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The Flamenco Cluster in Jerez: Cultural Industries and Endogenous Local Development in a Global Context

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THE FLAMENCO CLUSTER IN JEREZ: CULTURAL INDUSTRIES AND ENDOGENOUS LOCAL DEVELOPMENT IN A GLOBAL CONTEXT

ABSTRACT

This paper examines the flamenco ecosystem in Jerez de la Frontera (Spain) as a cultural cluster capable of generating sustainable endogenous local development. It focuses on how this ecosystem operates as a locally embedded system with the capacity to generate sustained economic activity.

The analysis combines regulatory review, tourism data from 2021 to 2024, and a mapping of the local business landscape. The findings show that the sector's strength lies in its ability to attract international demand to the place of origin, allowing economic value to remain within the territory. As a result, this dynamic has supported macroeconomic success and contributed to reducing seasonal fluctuations in tourism.

At the same time, this model is marked by internal tensions. Public investment remains uneven, working conditions in the artistic sector are often precarious, and digital infrastructures are fragmented, limiting further value capture.

Rather than presenting a stable success model, the paper argues that the long-term sustainability of this cluster depends on more coordinated forms of governance capable of linking cultural production, economic activity, and institutional support. In this sense, the case of Jerez provides empirical evidence of how intangible cultural heritage can function within global value chains while remaining territorially anchored

KEYWORDS

Cultural Industries; Cluster; Flamenco; Local Development; Economic Policy; Jerez.

1. INTRODUCTION

In the twenty-first century, a redefinition of growth paradigms is taking place, moving beyond the traditional three-dimensional view of sustainable development (economic, social, and environmental). Within this context, culture emerges not as a mere recreational accessory, but as the fourth pillar of sustainable development, a concept theorized by Jon Hawkes (2001) and endorsed by institutions such as the Spanish Sustainable Development Network, which identifies cultural practice as a determining factor for the cohesion, well-being, and resilience of contemporary societies (REDS, 2021). From this perspective, the analysis of heritage assets becomes a matter of applied economics and territorial structuring.

Flamenco represents the paradigm of this transformation. Following its inscription on UNESCO's Representative List of the Intangible Cultural Heritage of Humanity in 2010, this cultural expression—defined by Cerezo-Gallego (2015) as the most important expression of Andalusia's intangible cultural heritage and the region's principal marker of identity—has undergone a process of resemanticization, moving from historical marginality toward its consolidation as a leading heritage asset (Cruces-Roldán, 2008).

Far from constituting a static cultural tradition, flamenco is characterized by its capacity for transcultural hybridization (Steingress, 2002), a quality that has enabled it to move beyond the purely local sphere and meet demand in global markets, thereby becoming a dynamic cultural and creative industry. The focus of this research is flamenco as a driver of local economic development, assessing its capacity to generate employment, income, and brand value. This economic relevance is supported by recent research confirming the existence of a specific tourist profile—the flamenco tourist—whose decision to travel is determined by the search for live experiences and the identity of the territorial brand (Muñoz-Fernández et al., 2023).

For this cultural and creative industry to be viable on a global scale, it must be embedded in a territory that functions as a seal of guarantee of flamenco authenticity. For this reason, this study selects Jerez de la Frontera as its case study. In addition to being a historical epicenter of the production and codification of flamenco art, Jerez functions as a cultural cluster (Porter, 1990), geographically concentrating artists, educational institutions, and a dense supporting industry, thereby generating positive and competitive externalities.

The aim of this study is to analyze how this local ecosystem in Jerez has managed to implement a mechanism for transmitting the local to the global, exporting high value-added services to mature international markets such as Japan and the United States (Steingress, 2002), while at the same time confronting the tensions inherent in preserving the local identity of flamenco in the face of the profitability demands of the global market.

Through a triangulation of quantitative data, regulatory analysis, and a review of the business fabric, this study will assess the capacity of this cultural cluster to act as a driver of sustainable endogenous development within the framework of the 2030 Agenda.

2. THEORETICAL AND REGULATORY FRAMEWORK

Conceptualizing flamenco as a driver of sustainable endogenous local development requires situating it within contemporary debates on the economics of culture and regional development. This section establishes the theoretical foundations that legitimize flamenco as a complex economic asset and analyzes the institutional framework that seeks to organize flamenco as a structured productive system.

2.1. FLAMENCO AS A MIXED GOOD AND AN INTANGIBLE ASSET

From the perspective of cultural economics, flamenco challenges the classical categorization of goods. Following Throsby (2001), flamenco operates simultaneously as a cultural good, generating symbolic, aesthetic, historical, and social value (use value), and as a commodity that can be marketed in local and global markets (exchange value). This duality explains its capacity for international projection without becoming delocalized, in line with the concept of glocalization (Robertson, 1995), which Steingress (2002) applies to the flamenco ecosystem to show that a cultural expression can only be globally competitive if it is firmly rooted in the local sphere.

This duality generates a structural tension. On the one hand, its status as Intangible Heritage (UNESCO, 2010) places it within the sphere of public or preferred goods—merit goods—that require state protection. On the other hand, its tourist and stage exploitation turns it into a private service subject to the laws of supply and demand, thereby positioning flamenco as the core of a cultural and creative industry (CCI) with its own market dynamics.

According to Throsby's concentric circles model, the pure cultural value of flamenco—its aesthetics, symbolism, and identity—constitutes its central core, which sustains the economic network extending outward to private tourism and performance-related services (the outer circle).

From the perspective of economic anthropology, authors such as Cruces Roldán (2008) highlight the risk of the commodification of authenticity, a process through which heritage identity is transformed into a negotiable asset, bringing about a resemanticization of the genre. In the same vein, research on cultural tourism has identified three motivational dimensions that act as pull factors toward symbolic destinations: the flamenco experience, the flamenco brand, and flamenco as a pretext (Muñoz-Fernández et al., 2023). In Jerez, far from being a process of cultural erosion, this manifests itself as a strategic revaluation in which heritage identity materializes in the accumulation of embodied cultural capital among its artists (tacit knowledge of *compás, cante*, guitar playing, and dance), functioning as a cultural designation of origin. This condition requires global demand to materialize physically at the local level, ensuring that value is captured within the territory, and therefore within the productive and social fabric of Jerez.

2.2. THE THEORY OF CULTURAL CLUSTERS: APPLYING PORTER'S MODEL

To understand why Jerez de la Frontera maintains a competitive advantage over other territories such as Utrera, La Unión, and Lebrija, which also offer flamenco, we turn to the theory of the industrial cluster or industrial district (Porter, 1990; 1998), in which the cluster is defined as a geographically localized concentration of interconnected companies related to a sector, specialized suppliers, and associated institutions in a particular field that compete, but at the same time also cooperate.

When applied to cultural and creative industries (CCIs), this theory shows how the geographical concentration of talent and industry facilitates not only local efficiency and competitiveness, but also their competitive integration into global value chains (Gereffi et al., 2005; UNCTAD, 2022).

In the context of Cultural and Creative Industries (CCIs), Porter's Diamond in the flamenco ecosystem of Jerez is structured around four fundamental pillars (see Figure 1). First, the high specialization of human capital and the transmission of inherited knowledge act as barriers to entry, since they constitute a specific, scarce, and difficult-to-transfer (non-tradable) asset. Second, the pressure of demanding local demand, together with international training tourism, ensures in situ consumption. The framework is completed by related industries, which generate synergies and feed back into the cluster, and by the intense competition among performing agents, which stimulates innovation, excellence, and the differentiation of the cultural product.

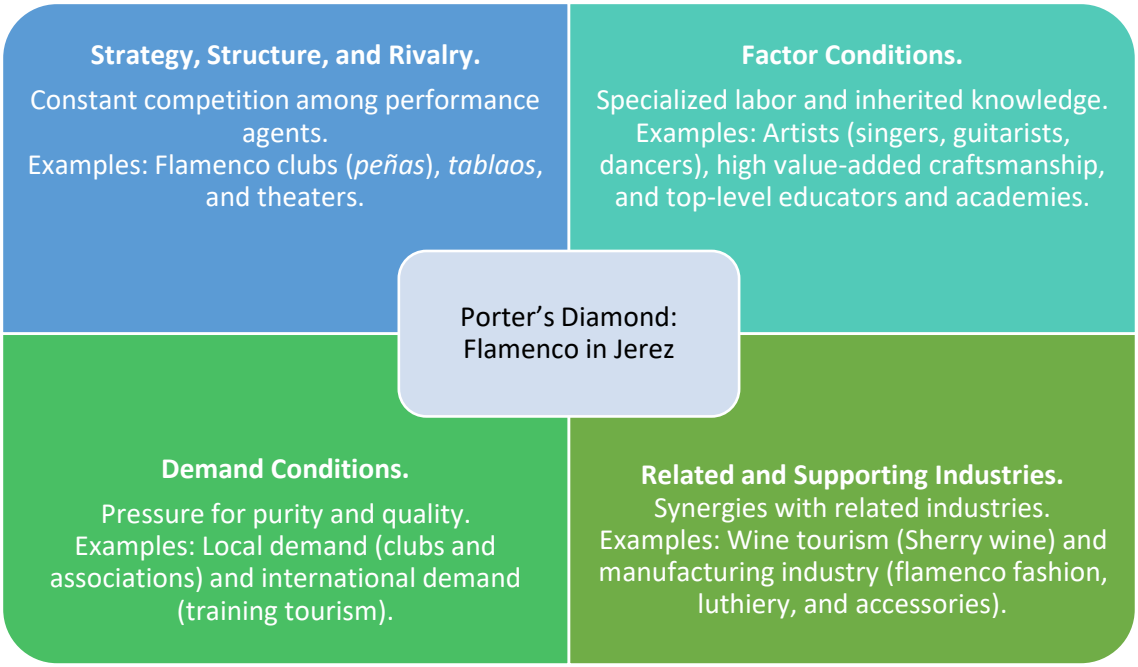


FIGURE 1: COMPETITIVE ADVANTAGE OF THE FLAMENCO CLUSTER IN JEREZ

Source: Author's own elaboration.

From this perspective, flamenco emerges as a local productive system capable of generating agglomeration economies derived from density and geographical proximity (Marshall, 1890), as well as knowledge *spillovers* with flows of ideas and innovation (Romer, 1990) toward other related sectors, such as cultural tourism, luxury craftsmanship, and audiovisual production.

2.3. INSTITUTIONAL FRAMEWORK: THE SDGs AND THE NEW REGULATORY ARCHITECTURE (2023–2024)

The sustainability of the cluster depends on an institutional framework that minimizes labor precariousness and promotes professionalization in the artistic sphere. Alignment with the 2030 Agenda has ceased to be merely an ethical recommendation (REDS, 2021) and has become, in Andalusia, a regulatory mandate, structured around four strategic axes:

1. SDG 8 (Decent Work and Economic Growth): aimed at the professionalization of the artistic fabric and the reduction of the informal economy through incentives for formal employment (Cerezo Gallego, 2015).
2. SDG 11 (Sustainable Cities and Communities): focused on the protection of intangible cultural heritage as a driver of urban regeneration in historic neighborhoods such as Santiago and San Miguel.
3. SDG 4 (Quality Education): the backbone of Law 4/2023, which establishes the mandatory inclusion of flamenco in the Andalusian educational curriculum. This objective ensures the continuous training of artistic human capital and the technical excellence required to maintain the competitive advantage of flamenco from Jerez in the international market.
4. SDG 17 (Partnerships for the Goals): establishes the imperative of a multi-stakeholder governance model for the cluster. In line with this mandate, the implementation of the

Destination Tourism Sustainability Plan (PSTD) and the use of Next Generation EU funds require public-private-community cooperation.

Two recent legislative milestones have reshaped the management landscape:

1. Law 4/2023, of 18 April, Andalusian Flamenco Law (Junta de Andalucía, 2023). This regulation elevates flamenco to the status of Andalusia's intangible cultural heritage, reinforcing the obligation of public administrations to promote not only its conservation, but also its professional and artistic fabric. Particularly noteworthy is the introduction of the concept of flamenco teaching within the educational system (Title IV), thereby strengthening the foundation for human capital formation in the sector.
2. Agreement of 19 November 2024 (Regional Ministry of Culture and Sport, 2024). This document institutionally identifies, for the first time in an official provision, the four subsectors that, for the purposes of this research, constitute the basic core of what we refer to as the Flamenco Cluster in Jerez: luthiery, flamenco fashion, private academies, and sustainable performances. In section four.c (Regional Ministry of Culture and Sport, 2024), the following subsectors of the flamenco industry are explicitly identified as priority areas for promotion:
    - The creation and performance of environmentally sustainable flamenco shows [2nd priority].
    - The artisanal manufacture of flamenco musical instruments (*luthiery*) [5th priority].
    - The creation and dissemination of flamenco fashion [6th priority].
    - The presence of flamenco in private teaching centers and academies [12th priority].
    - The promotion of flamenco research from an academic, labor, and business perspective [15th priority].

This regulatory framework demonstrates a shift in the promotion of flamenco toward a policy of investment in the productive fabric, recognizing that the sustainability of flamenco depends on the economic health of its supporting industries and on its capacity to integrate into global markets. It remains to be seen whether this orientation will translate into funding commensurate with the sector's real economic weight.

3. METHODOLOGY

To address the complexity of the flamenco ecosystem in Jerez de la Frontera, this research adopts an intrinsic case study approach, analyzing the territory as a specific economic unit in which cultural production processes and tourism consumption converge. The methodology employed is based on the triangulation of sources, combining the quantitative analysis of statistical series, the critical review of the academic literature, the analysis of the regulatory framework, and the mapping of the business fabric.

The research design has been structured into three analytical phases:

I) DOCUMENTARY AND REGULATORY ANALYSIS

In the first phase, a systematic review was conducted of the institutional framework governing the flamenco sector, analyzing strategic planning and legislative instruments at both the regional

and local levels, with particular emphasis on the Andalusian Flamenco Law 4/2023 (Junta de Andalucía, 2023) and, especially, the Agreement of 19 November 2024 (Regional Ministry of Culture and Sport, 2024) and the Resolution of 11 December 2024 (Andalusian Agency of Cultural Institutions, 2025). These documents were analyzed to identify how public administration has categorized and funded the subsectors of flamenco, making it possible to compare institutional discourse with actual budgetary implementation (PSTD; Jerez City Council, 2021) and Next Generation EU funds. In addition, the doctoral thesis by Cerezo Gallego (2015) and the REDS Guide (2021) were used to establish the theoretical baseline for the economics of the sector.

II) LONGITUDINAL QUANTITATIVE ANALYSIS (2021–2024)

To measure the economic and tourism impact, a longitudinal analysis was carried out of the key performance indicators (KPIs) contained in the Tourism Barometers of the Jerez City Council (2021–2024). Data processing consisted of calculating year-on-year variation rates and conducting a comparative analysis of time series, cross-referencing hotel profitability variables with the event calendar in order to identify the specific contribution of flamenco in:

- The evolution of RevPAR (Revenue per Available Room) and ADR (Average Daily Rate) as profitability indicators.
- Demand flows, comparing tourists' declared interest (inquiries at tourist offices) with actual consumption (visits to flamenco-related resources).
- Seasonality adjustment, evaluating the impact of the Festival de Jerez on hotel occupancy during the low season months (February/March).

III) MAPPING OF THE BUSINESS FABRIC: THE PHYSICAL CLUSTER

Finally, in order to validate the application of Porter's cluster model, a qualitative census was conducted of the main supporting industries in the territory of Jerez, identifying and categorizing the principal actors that make up the value chain, selected for their function as driving agents of the system.

The census was prepared through a digital verification strategy, cross-checking data from specialized sectoral portals, such as flamenco fashion and luthiery directories, with an analysis of positioning on geolocation platforms (Google Maps). This made it possible to identify not only registered firms, but also those maintaining an active digital footprint, a key requirement for attracting international tourists, while always prioritizing the strategic representativeness of the model over exhaustive census coverage.

The mapping covered:

1. Manufacturing Industry: luthiery workshops and instrument-making craftsmanship.
2. Fashion and Design: flamenco fashion brands and events.
3. Training: private dance academies and non-formal educational centers.

This triangulation makes it possible to diagnose potential structural tensions between the territory's value-generation capacity and current governance mechanisms, thereby going beyond a merely descriptive perspective.

4. THE CASE OF JEREZ: CULTURAL CLUSTER AND GLOBAL CONNECTION NODE

Jerez de la Frontera, in addition to operating as a territory of artistic representation, acts as a central *hub* for the production, training, and distribution of cultural services. Applying Porter's *Diamond* model (1990) to the territory reveals a functional cluster structure characterized by a high density of interconnected actors and specialization mechanisms that enable the export of local know-how to global markets.

4.1. FACTOR CONDITIONS: THE SPECIALIZATION OF HUMAN CAPITAL

Jerez's competitive advantage lies not only in its historical heritage, but also in the accumulation of specialized human capital that acts as a vector for the internationalization of its flamenco. Unlike other destinations that depend on imported talent (Madrid, Barcelona), Jerez functions as a training center and net exporter of artists, artisans, and knowledge.

This system is grounded in a unique foundation: the cultural capital embodied in its artists. These artists are the custodians of specialized tacit knowledge of *compás*, *cante*, dance, and guitar playing, based on oral transmission and historically preserved within the families of neighborhoods such as Santiago and San Miguel (Lefranc, 2004). This heritage, which began in the domestic sphere, was later institutionalized with the *Cátedra de Cante Jondo* in 1958 (currently the *Chair of Flamencology and Andalusian Folklore Studies*) and has evolved into a network of public and private education that professionalizes this transmission for the global market.

The analysis of the business fabric reveals the existence of high-performance centers such as IFI (*Instituto Flamenco Internacional*) (IFI Instituto Flamenco Internacional, n.d.), *Centro de Baile Jerez* (Centro de Baile Jerez, n.d.), *La Bailaora Flamenco Jerez* (La Bailaora Flamenco Jerez, n.d.), and *Patricia Ibáñez Centro de Baile Flamenco* (Patricia Ibáñez Centro de Baile Flamenco, n.d.). These spaces not only serve local demand, but also function as nodes of professional specialization for international students, responding to the flows of external demand recorded in municipal reports (Jerez City Council, 2024). It should be noted that this system generates stable employment in the training segment, in contrast to the dynamics of informality found in the productive base, which will be analyzed in the results section.

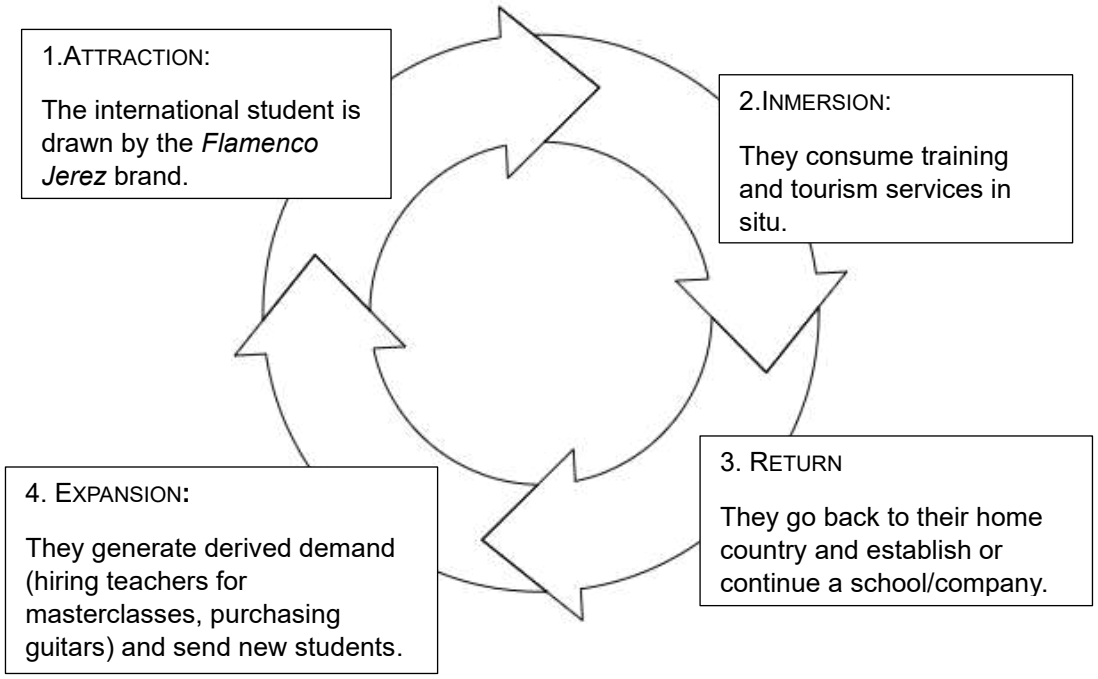
This training ecosystem has refined a system of internationalization which, from the logic of transcultural hybridization (Steingress, 2002), ensures that value is retained within the territory.

As illustrated in Figure 2: Reverse Export Model, the Jerez cluster has consolidated a cycle characterized by four stages: attraction, immersion, return, and expansion.

The key to this model lies in its final stage, in which the international student becomes a commercial advocate in their home country (Japan, the United States, France, etc.). Upon returning, they generate constant derived demand by hiring teachers from Jerez for masterclasses, recommending the purchase of tangible goods such as guitars and flamenco attire, and sending new students to Jerez. In this way, a global loyalty network is created in which the product *"Flamenco from Jerez"* is consumed remotely, consolidating a sustained inelastic demand upheld by these ambassadors without the need to relocate cultural production.

This strategic dependence on international students should not be interpreted as a threat to the purity of flamenco, but rather as a mechanism for its sustainability as a professional economic activity. As Aoyama (2009) demonstrated in her analysis of the flamenco industry, the qualified international tourist from markets such as Japan or North America acts as a necessary "co-producer" in a relationship of co-dependence that finances the local ecosystem and consolidates Andalusian cities as the irreplaceable core of this Global Value Chain. Jerez thus monetizes *staged authenticity* by compelling the consumer to travel to the original source.

FIGURE 2. REVERSE EXPORT MODEL: THE ACADEMY CYCLE



source: Author's own elaboration.

4.2. DEMAND CONDITIONS: DESEASONALIZATION AND THE *PROSUMER* TOURIST

The longitudinal analysis of the Tourism Barometers (2021–2024) shows that flamenco acts as the main deseasonalizing factor in Jerez's local economy, correcting the market failures caused by the seasonal decline of sun-and-beach tourism.

The data show that, while conventional tourism declines in winter, the Festival de Jerez generates notable peaks. According to the 2023 Tourism Barometer, during the festival period average hotel occupancy reaches 70.51%, with peaks of 79.09% in 3-star establishments (Jerez City Council, 2023), figures that are countercyclical for an inland destination. This profitability is accompanied by box-office success, with attendance rates above 90% in performance venues and a media impact that rose from 8.3 million euros in 2022 (Festival de Jerez, 2022) to 21.4 million in 2025 (Festival de Jerez, 2025).

From the demand-side perspective, the Jerez ecosystem has succeeded in cultivating a qualified segment that goes beyond the profile of the passive tourist: the prosumer. This user, who combines the roles of producer and consumer (Toffler, 1980), is characterized by loyalty and by extended stays linked to training.

Particular note should be taken of the resilience and consolidation of this segment, whose inelastic loyalty associated with training was already evident in 2022, when, in a context of post-pandemic recovery, students from 34 different nationalities were recorded (Festival de Jerez, 2022). By 2025, training provision had reached 100% occupancy, with 1,125 students from 41 countries and a media impact valued at 21.4 million euros (Festival de Jerez, 2025). These data consolidate Jerez as a global node of certification and legitimation of authenticity.

This dynamic corroborates the findings of Rastrollo-Horrillo and Navarrete (2020), who demonstrate that flamenco festivals operate as strategic platforms for internationalization "at

origin." By concentrating global demand within the territory, the festival generates social capital, understood as the network of contacts and bonds of professional trust created between local artists and foreign promoters, as well as commercialization networks in which international students themselves, upon returning to their countries, act as sales channels for the Jerez brand. This framework enables both SMEs and local artists to overcome barriers to entry into foreign markets without assuming the financial costs of relocation.

4.3. RELATED AND SUPPORTING INDUSTRIES: THE AUXILIARY VALUE CHAIN

According to Porter, the competitiveness of a cluster requires the presence of capable local suppliers and competitive related industries. In Jerez, flamenco has fostered the development of a manufacturing industry and auxiliary services that has been explicitly recognized in the recent Agreement of 19 November 2024 issued by the Regional Government of Andalusia (Regional Ministry of Culture and Sport, 2024). This regulatory framework elevates subsectors such as luthiery (5th priority) and flamenco fashion (6th priority) to the status of strategic interest.

Three basic subsectors can be identified as constituting the auxiliary industry of the Jerez cluster:

1. Craftsmanship and Luthiery (Manufacturing): The construction and repair of flamenco guitars is a high value-added activity with a strong local hallmark. Firms such as Esteban Eijo Luthier (Esteban Eijo Luthier, n.d.) and Gerónimo Mateos e Hijos (Gerónimo Mateos e Hijos, n.d.) not only supply the local market, but also export their guitars—such as the Jerez model—at both the national and international levels, linking the territorial brand to artisanal excellence.
2. Fashion and Design (Innovation): The textile sector has evolved from traditional dressmaking into runway fashion, consolidating Jerez as a space for artistic expression and conceptual innovation (Jerez City Council, 2020). In this process, the Pasarela Flamenca Jerez Tío Pepe (2024) acts as a launch platform for designers and brands that combine tradition with innovation in design.

From the cluster perspective, this industry performs a dual function. On the one hand, it energizes the network of local suppliers; on the other, it commercializes its creations through a dual circuit. In this way, it satisfies internal demand by stimulating retail trade (Diario de Jerez, 2025), while also projecting itself externally through digital channels and trade fairs (Flamenco Fashion, n.d.; GuiaFlama, n.d.).

3. Synergy with Wine Tourism: The connection between wine and flamenco is one of the most distinctive features of the Jerez model. Evidence of this can be found in initiatives such as "Veranea en la Bodega" by González Byass (2024), whose economic impact on the city was estimated at more than €18.8 million, as well as in the integration of performances into the *cathedrals of wine*, which shows how two industries reinforce one another in order to create a specific hybrid tourism product that is difficult for external competitors to replicate (Porter, 1998).

4.4. TWO MANAGEMENT MODELS: THE PRODUCTIVE TENSION BETWEEN THE ASSOCIATIVE AND THE BUSINESS-ORIENTED APPROACH

Within the cluster, there are two contrasting management models, both of which enhance competitiveness:

- The associative model (social base): Represented by the Local Federation of Flamenco Peñas of Jerez (Turismo Jerez, n.d.), which brings together entities such as Peña Flamenca Los Cernícalos, founded in 1969 (Garrido, 2019), Peña Flamenca Tío José de

Paula (Castaño, 2007; Montes, 2025), Peña Flamenca Buena Gente (Festival de Jerez, n.d.), and the recently incorporated Asociación Cultural Flamenca Las Cadenas (Jerez City Council, 2025). These institutions act as custodians of orthodoxy, flamenco quality, and the designation of origin, ensuring the authenticity of the cultural product and serving as a breeding ground for talent.

- The business model (market): This consists of an ecosystem of private performance venues such as *tablaos* and *tabancos*, which professionalize and structure the performance experience. These venues offer flamenco of a high artistic standard for tourism consumption and also ensure the regularity of the offer. Particularly well established in Jerez are professional venues such as Puro Arte Flamenco Jerez and Tablao Flamenco Jerez (Puro Arte Flamenco Jerez, n.d.), La Guarida del Ángel (La Guarida del Ángel, n.d.), and Tabanco El Pasaje (Tabanco El Pasaje, n.d.).

In addition to fostering constant innovation, these two ways of managing flamenco become a strength of the system. While the *tablao* must maintain high artistic standards in order not to be delegitimized by the artistic social base, the *peñas* are in turn compelled to professionalize their business management.

It should be noted that this transition toward professionalization is now supported by the 2024 Agreement, which explicitly establishes as priority 15.a the "promotion of flamenco research from an academic, labor, and business perspective" (Regional Ministry of Culture and Sport, 2024), thereby institutionally legitimizing the sector's transformation toward more rigorous management structures.

Ultimately, the uniqueness of the Jerez cluster lies in its capacity to articulate a model of sustainable endogenous development in which the cultural capital embodied in its artists is commercialized through a dense network of actors within the territory. As analyzed here, this ecosystem rests on four interconnected pillars: academies as a training engine and vector of internationalization; peñas as custodians of flamenco orthodoxy; supporting industries (*luthiery*, fashion, and wine tourism) that add value to the Flamenco in Jerez brand; and tablaos as spaces for the professionalization and performance of artists.

The existence of this network functions as a mechanism for territorial value capture, ensuring that the wealth generated by the designation of origin of Flamenco de Jerez is not externalized, but instead reverts to the local socioeconomic fabric itself.

5. RESULTS AND DISCUSSION: STRUCTURAL TENSIONS OF THE CLUSTER

The cross-analysis of the statistical series (2021–2024), the recent regulatory framework, and the reality of the business fabric reveals that, although Jerez functions as a global node of cultural production (flamenco), the cluster faces structural tensions that threaten its long-term sustainability.

5.1. FINANCIAL ASYMMETRY: MACRO STRENGTH VS. MICRO INVESTMENT

There is a significant asymmetry between the aggregate economic impact attributed to the flamenco sector in Andalusia and the reality of public investment. According to recent studies on the state of the sector, although 72% of the Spanish population consumes this genre, 80% of citizens perceive that support from public administrations is insufficient (Fundación Paco de Lucía and EY, 2025). The analysis of the support instruments, which include Law 4/2023, the Tourism Sustainability Plan for Destinations (PSTD), and the mobilization of *Next Generation* EU funds for infrastructure, reveals a fragmented and limited public investment.

From a macroeconomic perspective, the Resolution of 11 December 2024, issued by the Andalusian Agency of Cultural Institutions (2025), allocates a total of 210,000 euros for the promotion of the professional fabric across the entire autonomous community, an amount that is insufficient to sustain an industrial sector such as flamenco in Andalusia. Similarly, at the local level, investment through the Tourism Sustainability Plan for Destinations (PSTD), financed with *Next Generation* EU funds, allocates 132,000 euros for the completion of the Lola Flores II Cultural Center (Jerez City Council, 2021).

This imbalance suggests that the development and sustainability of the Jerez cluster are not being driven by public spending, but rather depend fundamentally on the investment efforts and resilience of local SMEs.

5.2. SOCIAL SUSTAINABILITY (SDG 8): THE PERSISTENCE OF INFORMALITY

The sustainability of the model, analyzed through the lens of SDG 8 (Decent Work and Economic Growth), reveals structural fragility. While the mapping of the business fabric carried out in this research confirms the existence of a performance segment (festivals) and centers for the transfer of knowledge (academies), together with an auxiliary industry operating under formalized market standards, the scarcity of formalized business structures among grassroots artists suggests the persistence of the dynamics described by Cerezo Gallego (2015) as "a-business" in nature, which favors the informal economy and makes it difficult for the cluster's tourism success to translate into decent work for the individual artist.

In this regard, the November 2024 Agreement and Law 4/2023, by requiring professionalization and documentary proof, such as invoices and contracts, as a necessary condition for receiving aid, implicitly reveal the institutional need to combat an informality that remains latent in the sector.

There is therefore a growing tourism market coexisting with an artistic base that, in the absence of robust intermediary business structures, risks remaining within the informal economy in order to survive.

In contrast to this labor precariousness, the profitability of the tourism sector associated with flamenco stands out. Although the increase in RevPAR from €48.42 in 2022 to €56.46 in 2024 is due to multiple factors (Jerez City Council, 2024), flamenco demonstrates its added value by generating hotel occupancy rates above 70% and show attendance above 90% during the low season (Festival de Jerez), providing a strategic countercyclical profitability that is effectively captured by the tourism and real estate infrastructure, with 1,273 registered tourist-use dwellings (Jerez City Council, 2024).

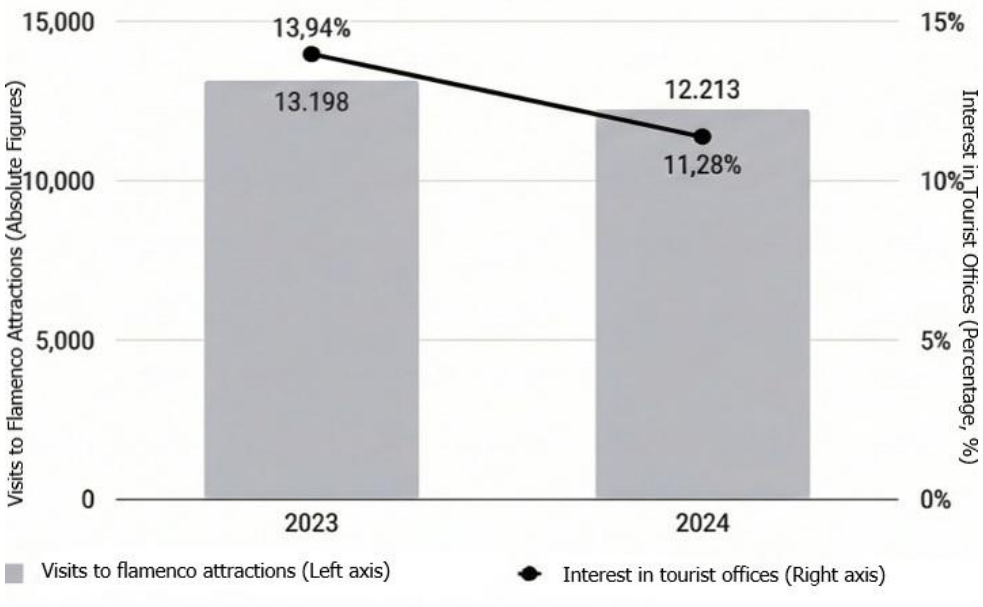
By contrast, this real estate pressure may generate a risk of cultural *gentrification* (Cruces Roldán, 2008), arising from tensions between the needs of the tourism market for cultural immersion in these neighborhoods and the preservation of their identity, potentially resulting in the displacement of the local community (the artist) due to rising prices in historic areas such as Santiago and San Miguel.

5.3. RECONFIGURATION OF DEMAND AND THE DIGITAL DIVIDE

The analysis of tourist flows reveals shortcomings in the channeling of demand, as shown in Figure 3. According to the 2024 Tourism Barometer, declared interest at tourist offices fell from 13.94% in 2023 to 11.28% in 2024, and visits to the flamenco heritage offer declined by 7.46%, from 13,198 to 12,213 visitors (Jerez City Council, 2024). This figure is striking when compared with the destination's overall trend: while the total number of visitors to the city's attractions grew by 9.16%, reaching 1,260,841 recorded visits, interest in the institutional flamenco offer

declined. This clearly reveals a decoupling between the macro growth of tourism and the consumption of official heritage offerings (Jerez City Council, 2024).

Figure 3: Evolution of Flamenco Tourism: Interest vs. Actual Visits



Source: Author's own elaboration based on data from the tourism barometer.

This generalized decline in official records reveals a shift in preferences toward experiential consumption. Although shortcomings in the promotion of museums cannot be ruled out, the main hypothesis is that demand prioritizes direct experience over passive contemplation.

This abandonment of the traditional museum offer finds strong justification in behavioral economics. Recent research such as that of Fernández-López et al. (2025) empirically demonstrates, through structural equation models, that in flamenco tourism, affective engagement (emotional connection) and novelty are the only significant predictors of satisfaction and return intention, whereas cognitive and physical engagement have no statistical impact. This confirms that tourists reject passive and intellectualized forms of consumption, preferring direct immersion in living ecosystems such as tablaos, peñas, or academies, where this affective experience is materialized.

Along the same lines, the study by Heredia-Carroza et al. (2021) shows that the valuation of flamenco depends by more than 50% on the emotional dimension (feelings). This factor, which is activated almost exclusively during the artist's live performance, explains why the static museum format loses competitiveness compared with immersion in tablaos, peñas, or private courses, where cultural capital is transmitted in real time. Thus, while the "prosumer" seeks training (as evidenced by course occupancy), the general tourist redirects consumption toward live performance, penalizing in both cases the static museum offer. This shows that the traditional model is losing effectiveness in comparison with immersive experience.

Despite having strong digital communities, with 13,680 followers on Facebook and 4,136 on Instagram, according to municipal data from 2024 the offer remains fragmented because there is no unified digital platform—a cluster marketplace—that would allow users to book a class, purchase a guitar, or reserve a table at a tablao in a single transaction. This digital atomization of the sector prevents the high initial interest of the flamenco tourist from being converted into greater direct value capture.

5.4. THE CLUSTER AS A VECTOR OF ENDOGENOUS DEVELOPMENT: ASSESSMENT AGAINST THE SDGs

Beyond the financial impact that flamenco may have in Jerez, the relevance of the case lies in how flamenco in Jerez acts as a driver of sustainable endogenous local development, configuring itself as a heritage asset that emanates from the local community itself.

The analysis of the ecosystem makes it possible to assess its alignment with three objectives of the 2030 Agenda:

- Impact on SDG 4 (Quality education): Jerez has succeeded in transforming traditional knowledge into a high-level technical training asset through the *Chair of Flamencology*, the professional music conservatory, and the network of professional academies that structure the Academy Cycle. The success of flamenco training in 2025, with 100% occupancy in training places and students from 41 countries (Festival de Jerez, 2025), demonstrates that the cluster fulfills the goal of providing high-level technical and professional skills. This pedagogical ecosystem contributes to SDG 4 in a twofold way: on the one hand, through Target 4.4, by professionalizing the transmission of technical skills for artistic employability; and on the other, through Target 4.7, by ensuring the safeguarding of intangible cultural heritage through global education.
  To guarantee equal and universal access to this heritage, in accordance with Target 4.5, the recent 2024 Agreement establishes as 8th priority the "mandatory teaching of flamenco in educational centers" (Regional Ministry of Culture and Sport, 2024), an essential measure to ensure the universalization of heritage knowledge beyond the circuits of professional specialization.
- Contribution to SDG 11 (Sustainable cities and communities): Flamenco acts as a driver of urban regeneration in historic neighborhoods such as Santiago and San Miguel, supported by investment in infrastructure such as the Lola Flores II Cultural Center (€132,000 from Next Generation EU funds), thereby contributing to the protection of cultural heritage (Target 11.4) (Jerez City Council, 2021). However, there is a risk of cultural gentrification (Cruces Roldán, 2008), since the possible displacement of the local community would threaten the very social sustainability that this SDG seeks to protect if tourism growth is not balanced with housing policies for local artists.
- Governance and SDG 17 (Partnerships for the goals): The Jerez model is an example of public-private partnerships. The implementation of the flamenco PSTD in Jerez requires multilevel cooperation between the City Council, the Regional Government of Andalusia, the business fabric, and the associative fabric (*peñas*). As the REDS Guide (2021) points out, culture is only sustainable if it is managed through governance involving multiple stakeholders.
  The results show that, although partnerships exist for specific events, Jerez still lacks a permanent collaborative structure capable of maximizing European funding and reducing the atomization of the sector. In this way, SDG 17 is not a mere formality, but rather the indispensable operational tool for cohesively structuring the ecosystem, maximizing its competitiveness, and gaining access to European funds.

Millán Vázquez de la Torre et al. (2019) emphasize this need for collaborative governance. By applying the Lean Startup methodology to flamenco tourism, these authors warn that, although the transformation of flamenco into a tourism product cannot be stopped, its sustainability requires effective coordination among public administrations, promoters, and artists in order to prevent flamenco heritage from being distorted.

6. CONCLUSIONS AND RECOMMENDATIONS

The findings of this research suggest that flamenco constitutes a significant endogenous cultural resource that contributes to the development of Jerez de la Frontera as a specialized cultural cluster. The case illustrates how a territory's intangible cultural heritage may support its positioning within the global economy through connections with tourism, related manufacturing activities (particularly luthiery and fashion), and the international provision of educational services. The evidence also points to potential positive externalities for the local economy, although their magnitude and causal relationships require further investigation.

6.1. SYNTHESIS OF FINDINGS: THE MODEL OF GLOCALIZATION AND TERRITORIAL EMBEDDEDNESS

The findings suggest that flamenco in Jerez extends beyond the dynamics of cultural exportation and exhibits characteristics consistent with a model of glocalization (Robertson, 1995; Steingress, 2002)—thinking globally, producing locally. Unlike the delocalization processes observed in certain industrial sectors, the Jerez case illustrates how territorial embeddedness (Granovetter, 1985; Hess, 2004) may constitute a source of differentiation and competitive advantage.

1. Reverse exportation: Unlike agriculture, which exports physical products beyond the territory, flamenco in Jerez also operates through a form of reverse exportation, attracting international consumers, particularly students, who travel to the place of origin to access cultural and educational services. In line with Aoyama (2009), these visitors can be understood as co-producers who contribute to the local cultural ecosystem through direct consumption. The activities of flamenco academies suggest that Jerez's reputation for authenticity represents an important attraction for international students and professionals seeking continued engagement with the territory.

2. Territory as a designation of origin: The cluster exhibits characteristics comparable to those of a cultural designation of origin. The Flamenco de Jerez brand encompasses artistic expressions associated with cante, toque, and baile, with their distinctive local musical and expressive characteristics, as well as related industries such as luthiery and fashion. This territorial identity may function as a differentiation mechanism within increasingly globalized cultural markets, contributing to the preservation and recognition of the local flamenco ecosystem.

3. Human capital as a vector of internationalization: Enrollment data from the Festival de Jerez indicate the international reach of flamenco education in the city. In the 2025 edition, the participation of 1,125 students from 41 countries (Festival de Jerez, 2025) illustrates the existence of an international audience with the potential to contribute to the dissemination of Flamenco de Jerez. Furthermore, the presence of international students may help diversify tourism demand and generate economic activity beyond the immediate performance sector. However, the extent to which these flows contribute to tourism deseasonalization and sustained local income requires more detailed longitudinal analysis.

4. The governance gap: financial asymmetry: The analysis identifies a potential imbalance between the growing visibility of flamenco as an intangible cultural asset and the public funding mechanisms examined. The reported media impact valuation of the Festival de Jerez increased from 8.3 million euros during the post-pandemic recovery period (Festival de Jerez, 2022) to 21.4 million euros in 2025 (Festival de Jerez, 2025). However, this increase in estimated media visibility does not necessarily correspond to an equivalent expansion in the public funding

examined. This apparent asymmetry raises questions about the adequacy of existing support mechanisms for the long-term sustainability and professionalization of the sector, particularly in relation to decent work (SDG 8). The findings also highlight the relevance of private initiative and the local business fabric in sustaining flamenco-related activities.

5. Resilience vs. atomization: The cluster's business fabric presents a potential structural tension. The predominance of small and medium-sized enterprises may provide flexibility and adaptability, while also creating challenges related to coordination, digital visibility, and market access. The 99% year-on-year increase in the number of visitors recorded in 2022 (Jerez City Council, 2022) reflects the recovery of tourism activity during that period, although it cannot be directly attributed to the organizational structure of the flamenco cluster. Similarly, the 7.46% decline in registered visits to flamenco attractions in 2024 (Jerez City Council, 2024) suggests changes in recorded visitation patterns but does not, in itself, establish a structural transformation in tourist preferences. Nevertheless, research by Heredia-Carroza et al. (2021) and Fernández-López et al. (2025) highlights the relevance of participatory and immersive cultural experiences. In this context, improved digital coordination and integrated marketing tools could strengthen the visibility and accessibility of Jerez's flamenco-related offerings.

6. Flamenco as a vector of sustainable endogenous development: The ecosystem analyzed illustrates the potential of a development model based on the valorization of territorially embedded cultural and heritage resources. The presence of local SMEs, academies, tablaos, and artisans suggests opportunities for retaining economic activity and strengthening local productive linkages. However, the extent to which the economic value generated is retained and reinvested within the territory cannot be conclusively established from the available data. The findings therefore support the interpretation of flamenco as a potentially relevant contributor to endogenous local development, whose long-term sustainability depends on appropriate governance, institutional coordination, and the preservation of cultural authenticity.

6.2. ECONOMIC POLICY AND MANAGEMENT PROPOSALS

Based on the findings and the identified challenges, three policy and management measures are proposed to strengthen the potential contribution of the flamenco cluster to sustainable local development, in line with the 2030 Agenda. These proposals should be understood as strategic recommendations rather than interventions whose effectiveness has been empirically demonstrated by this study.

A. CREATION OF A CLUSTER MANAGEMENT ENTITY (CME)

In line with Millán Vázquez de la Torre et al. (2019), who, following the application of the Lean Startup methodology to the flamenco sector, emphasize the importance of strategic planning, greater coordination among public administrations, entrepreneurs, and cultural creators could contribute to heritage preservation and destination competitiveness.

It is therefore recommended to explore a transition from a predominantly institutional management model (City Council/Regional Government) toward a Public-Private-Community Governance model (REDS, 2021), integrating public administrations, businesses (tourism operators, academies, and artisans), and community organizations (peñas and associations).

Such an entity could facilitate data management, access to European funding, coordination among stakeholders, and the development of a shared internationalization strategy.

B. FROM PERFORMANCE TO STRUCTURE

Existing aid schemes, including those established under the 2024 Resolution, could be complemented by measures aimed at strengthening the long-term business structure of the sector. Alongside support for artistic performances, greater attention could be given to the digitalization of SMEs, quality certification (including the ICTES "S" Seal for tablaos and academies, where applicable), and occupational risk prevention and employment formalization measures.

These initiatives may contribute to improving organizational capacity, professionalization, and working conditions, although their effectiveness would require subsequent evaluation.

C. UNIFIED DIGITAL PLATFORM: TERRITORIAL MARKETPLACE

To address potential information asymmetries and improve the accessibility of the local flamenco offer, the development of an integrated digital platform could be considered. Such a platform might connect different components of the value chain, enabling visitors to access educational activities, artisan products, and live performances through a coordinated digital environment.

For example, it could facilitate bookings for flamenco classes, the purchase of locally produced instruments, and reservations for performances or related cultural experiences. Its implementation would require stakeholder participation, technical feasibility assessment, and evaluation of its potential economic benefits.

Ultimately, the case of Jerez de la Frontera suggests that flamenco can be understood not only as an artistic and heritage expression but also as a cultural resource with potential relevance for sustainable endogenous development. Its contribution to the local economy appears closely linked to territorial identity, specialized cultural activities, and the interaction between local stakeholders and international audiences.

6.3. LIMITATIONS OF THE STUDY

This study has several limitations that should be acknowledged. First, the research relies on secondary quantitative data from municipal tourism barometers, which are aggregated at the destination level and do not allow for individual-level tracking of flamenco tourists. Second, the qualitative business mapping, while systematic, is based on digital verification and may not capture informal or unregistered actors within the flamenco ecosystem, potentially underestimating the true size of the cluster. Third, the study adopts an intrinsic case study design focused exclusively on Jerez de la Frontera; therefore, the findings may not be directly generalizable to other flamenco territories (e.g., Utrera, La Unión, Lebrija) without further comparative research. Fourth, the analysis is primarily descriptive and correlational, meaning it does not establish direct causal relationships between flamenco activity and the observed economic outcomes. Finally, the reliance on publicly available data means that certain variables of interest, such as individual artist incomes or informal employment rates, could not be directly measured. These limitations do not invalidate the findings but should be considered when interpreting the results and designing future research.

Data availability statement

The data supporting the findings of this study are derived from publicly available sources cited in the reference list.

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