A comparative study for understanding the **impact and evolution** of the **tourism role** in Burgos province

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Abstract | Nowadays, tourism plays a very important role in the growth of the economy, and in particular, in the province of Burgos the tourism sector is an important source of economic and social development. Therefore, it is necessary to optimize the competitive advantages of this area of northern Spain by creating a responsible and sustainable tourism model that aims to reach the 17 SDGs. This study analyses the evolution of tourism supply and demand, comparing it with data from Castilla y León, Spain and five other provinces in Spain, as well as examining the tourist's profile and perception. The findings show that the increase in the number of hotel establishments was greater than that at national and regional level, but the growth of the supply of rural tourism accommodation establishments has stagnated in the last two years. The number of passengers in Burgos has been growing since 2012, with a slight decrease in 2018, in contrast the number of travellers in rural accommodation establishments has increased substantially since 2015. The visits are characterized by being short and with few expenses, focused mainly on the restaurant sector. The degree of overall satisfaction and loyalty continues to be high. Finally, all services related to catering, infrastructures, information points and complementary activities to historical tourism should be improved to maximize tourist satisfaction and loyalty.

Keywords | Tourism, Burgos, tourist indicators, smart destination, SDGs

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1. Introduction

Nowadays, tourism is one of the top and fastest growing sectors in the world; it plays a very important role in the growth of the economy (Osman, 2013). The total contribution of the tourism sector to the world GDP is more than 2.45 trillion euros and to the Spanish GDP is almost 178,000 million euros in 2018. It is also important to point out that these figures are going to increase in the coming years and therefore the tourism sector will have a greater weight in both the global and national economy, even its contribution is expected to increase the Spanish GDP by almost 50 billion for 2028 (Statista, 2019b).

In the province of Burgos, tourism is a sector that promotes both economic and cultural activity. In 2017 the tourism sector generated in that province an economic impact of 398.3 million euros, a figure that represents an increase of 32.9% over the previous year, which was also reflected in the steady increase in employment in this sector by approximately 3% (Burón, 2018). In addition, the tourist demand indicators show that the number of travellers has increased from 2015 to 2018 by 22.90% and the number of overnight stays has also increased by 21% in the same period (JCyL[1], 2019).

These data show tourism is an economic powerhouse and it has the potential to contribute to all of the Sustainable Development Goals (SDGs)[2]. In general, tourism has been included in Goals 8, 12 and 14 on inclusive and sustainable economic growth, sustainable consumption and production and the sustainable use of oceans and marine resources. Definitively, tourism should play an important role in delivering sustainable solutions for people, the planet, prosperity and peace (UNWTO, 2019).

In the case of the province of Burgos, tourism is an important source of economic and social development which gives a benefit to its local communities. Tourism provides income through job creation at local and community levels (SDG 1 – No poverty) and the tax income generated from tourism can be reinvested in health care and services (SDG 3 – Good health and well-being). Also, tourism in Burgos can be a powerful tool for community development and reducing inequalities (SDG 10 – Reduced inequalities) in terms of developing the rural destination of Burgos with an integrative vision that focuses its tourism evolution on the joint development of new information technologies, sustainability, innovation or social cohesion (Aguilar & García, 2019). Tourism can advance urban infrastructure and accessibility and promote regeneration and preservation of cultural and natural heritage, assets on which tourism depends (SDG 11 – Sustainable cities and communities) since rich biodiversity and natural heritage are often the main reasons why tourists visit a destination (SDG 15 – Life of land) (Cornell, Tugade & De Sagun, 2019). The pursuit of all these objectives will help to alleviate an important current problem which is that of the depopulation suffered by many places in the Spanish interior. Taking action to preserve natural and heritage resources is a key factor in enhancing the value of destinations from the point of view of territorial sustainability and tourist attractiveness.

In short, as PEBUR 15-20[3] says, it is necessary to optimise the province's competitive advantages by creating a more sustainable and economically efficient tourist destination model in order to position Burgos as a benchmark for quality of life, economic activity and smart destination (SODE-

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[1]Acronym for Board of Castilla y León in Spanish language
[2]The 17 Sustainable Development Goals address the global challenges the world faces, including those related to poverty, inequality, climate change, environmental degradation, peace and justice (United Nations, 2019).
[3]Acronym for Rural Strategic Plan of Burgos from 2015 to 2020 in Spanish language. http://pebur1520.org/
[4]Employment in the tourism sector in Burgos accounts for 7.74% of total employment in December 2018 compared to 6.98% in December 2010 (Turespaña, 2018).

BUR, 2015).

Given that tourism is fundamental in the generation of income, wealth and employment[4] in Burgos, this study aims to analyse the evolution of tourism in the Burgos province over last years from two points of view: tourism supply and demand, comparing the evolution of Burgos with other Spanish regions, as well as analyse the Burgos's tourists' profile and behaviours.

In this way, this study will serve as a working tool for supporting those agents and institutions involved in tourism in monitoring and better understanding the impact and evolution of tourism across its economy, to facilitate the assessment and performance of decision making on this activity. The overall study allows to obtain a general view and outline the characters to be taken into account in the design a tourism development model. This model should be aimed at improving the competitiveness of the tourism sector by boosting tourism demand and supply and the tourist satisfaction of the place visited in that province in a sustainable way.

The objectives pursued in this paper are to highlight the importance of tourism in the province of Burgos and to determine the profile and perception of tourists in order to identify proposals for improvement that contribute to achieving the aforementioned SDGs. The innovation of this work is to assess the tourism sector in a province in Northern Spain, particularly, in the province of Burgos which has a vast monumental and cultural heritage and natural resources, to be able to create a tourism development model that links the tourism activity with its industrial activity, the great gastronomic potential, the geostrategic location and its sustainable development.

To do so, the work is divided into 4 further sections. In "Theoretical background" section some similar studies are reviewed, in "Research methodology" section, the methodology behind the investigation is described; in "Results" section, the results are presented; and, finally, in "Conclusions" section, a series of conclusions, drawn from the development of the study, are presented.

2. Theoretical framework

Tourism indicators are key sources of information for tourism stakeholders such as entrepreneurs, institutions, tourism researchers, etc. since the tourism supply and demand will allow to know where it is necessary to open new establishments, whether hotels, hostels or restaurants, or improve infrastructures and tourists' attention and hospitality. The literature has analysed the tourism sector from different points of view for several places, often finding that the study varies depending on the specific country or region examined, the time periods considered and the tourist indicators used.

In the case of Spain, an analysis of the international demand for cultural tourism in the period 2005-2013 has been carried out by Gómez, Sánchez & Pablo (2018), studying the variety of motivations that induce tourists to choose a destination according to their profile and characteristics and the different packages of tourist products offered in Spain. In this way, the motivations that lead international tourists to choose Spain as a destination placed at the top of the tourist typologies framed around culture, sun and beach or the natural environment. In addition, the different statistical sources emanating from official institutions in Spain, such as the Institute of Tourism Studies, the National Statistics Institute or the Ministry of Education, Culture and Sports, have been used to specify significant aspects of the cultural tourist demand for each of the Spanish regions, in such a way that territorial comparisons of standardised statistical data can be established (Gómez, Sánchez & Pablo, 2018). Vizcaíno (2015) examines from an economic point of view the evolution of national tourism from the 1960s to 2015 and will specifically focus on cultural tourism through an

economic and social study, concluding that tourism generates the most income per year in the country and that the year-on-year rate of export increases the most compared to tourism for leisure and holidays.

As a complement to this national analysis, other tourism studies have been accomplished in different regions and cities of Spain, like in the region of Andalusia where the development of tourism activity has been studied through a series of statistical indicators, both for the contextualisation of Andalusia within the Spanish framework and for the chronological evolution of activity in the region and its internal distribution (Fernández & Mendoza, 2007). Also, within this region, in the city of Córdoba, the link between gastronomy and tourism was investigated by Jiménez, López-Guzmán & González (2016) determining the profile, motivations and satisfaction of international tourists that visit the city. The main results confirmed the presence of highly educated tourists with high purchasing power, who visit this destination with the motivation of knowing its cultural heritage, and who are satisfied with the overall visit. In another region of southern Spain, in the Region of Murcia, Moreno, Martínez, & García, (2018) have analyzed the situation of cultural tourism and have evaluated the impact of the actions carried out in the main regional places.

As seen in some studies, the profile of tourists and the tourism supply and demand are different in the areas of northern and southern Spain (Llaneras, 2017; Serrano, 2018; Statista, 2019a). For example, in the Galician region, the situation of literary tourism has been analysed to verify whether the necessary actions are being taken to turn Galicia into a reference literary tourism destination (Vázquez & Araújo, 2018).

Analyses typically focus on a large region, not a province, or are based on the evolution of a particular type of tourism, such as cultural tourism or literature tourism, but not on all tourism categories as this work does.

In addition, there are also reports that analyse tourism in America, Asia and other European countries. Most of the studies found in America take place in different regions of Ecuador. Apolo, Sotomayor and Brito (2019) describe the economic characteristics of the hotel and tourist sector of the region of Pasaje through the execution of a socioeconomic analysis of the hotel situation by using a non-experimental descriptive analytical methodology that allows to contribute with relevant information for the application of design strategies and market tactics that strengthen the competitive position of the sector. Although this place does not have enough economic structure to improve the conditions of the sector, it has a variety of tourist resources that can economically boost tourism. In another region of Ecuador, Cuenca, a study has been conducted by Serrano and Villafuerte (2018) to identify tourism indicators of supply and demand through the collection of both primary and secondary information in order to characterize the local tourism market and determine the relationship with the macro tourist environment. The methodology used was very similar to the one used in this research in the province of Burgos, since a quantitative approach with descriptive scope was used by means of closed surveys through a non-probabilistic sampling for convenience. This analysis was an incentive for the alliances that can be generated among the actors of the tourism sector (Serrano & Villafuerte, 2018). In the case of the commune of Montañita, located in the parish of Manglaralto, province of Santa Elena in Ecuador, the work carried out was based fundamentally on the analysis of the profile, motivations and satisfaction of foreign tourists visiting this place, a sun and beach tourist destination. The purpose of the aforementioned research, like the one of this study, is to use the results obtained so that tourist service providers design products and offer services according to demand (Carvache, Torres & Carvache, 2017).

In Hong Kong, China, Cheng (2011) has exa-

mined economic and legal determinants such as purchasing power in relation to changes in nominal rates and changes in the level of foreign prices as well as relaxation in the VISA requirement, which affect tourist demand from tourists coming from mainland China, Taiwan and Japan. Also, in Europe, Bel, Lacroix, Lyserb, Rambonilazab and Turpinc (2015) analysed tourist demand with national data obtained from the French tourist demand survey and the profile of visitors in three rural areas of France, showing that visitors stay in campsites and rural houses in order to enjoy the natural, cultural and gastronomic services offered in the area.

Unlike the studies that have been reviewed in the literature, this study analyses a wide range of data jointly collected from indicators of tourist supply and demand and 1,554 surveys to examine the tourist's profile and perception in order to provide a fundamental diagnostic and decision-making key for the province's tourism activity.

3. Methods

The study of tourism demand and supply is based on obtaining different data through the search in databases such as the INE[5] of Spain with EOH[6] and EOHTR[7] (INE, 2019) and the Statistical Information System of the JCyL. comparing this evolution with that of the region of Castilla y León, with Spain and with five Spanish provinces with similar characteristics to those of Burgos which are Salamanca, León, Cáceres, Córdoba and Cuenca. When comparisons are made with the results obtained in Burgos, Castilla y León and Spain, index numbers are used, as otherwise it would not be possible to represent them graphically.

To determine the profile and perception of tourists face-to-face interviews have been carried out.

The target population of this study is 110,021 tourists in rural tourism accommodation in Burgos in 2018 (Table 6). The sample consists of 1,554 valid questionnaires, with a 95% confidence level for global data and a sampling error of 2,486% The geographic scope of information collection is the province of Burgos without including the city of Burgos.

The purpose of this survey is to collect representative information from tourists in Burgos as to the profile of the tourist, the preparation of their visit, the behaviour at the destination (i.e., the duration of the visit, whether the tourist spends the night or not, the type of accommodation where the tourist is staying, the itinerary the tourist makes, the total cost of the visit and the activities the tourist spends on, …), and finally, the degree of satisfaction, both general and specific, in different items, as well as the degree of loyalty of the tourist.

Since 2014, the collection of personal surveys has been ongoing, but due to the proximity in time, this study focuses on the results obtained in 2018.The fieldwork has been carried out on a continuous basis through collaborators in different hotel and rural tourism establishments, and on a seasonal basis, in the holiday periods of Easter and Summer break (July and August) through street pollsters, students and professors from the University of Burgos. The questionnaire is structured and approved according to the objectives established to carry out this study. In the questions related to the satisfaction of the trip and with the valuation of the experience, the Likert scale is used (valuation of different aspects in a numerical scale with a range from 1 (minimum) to 5 (maximum)). The methodology proposed, in short, consists of carrying out a face-to-face survey in tourist places both in the street and in Tourist Offices and other points of interest to people over 16 years of

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[5]Acronym for National Statistics Institute in Spanish language.
[6]Acronym for Hotel Occupancy Survey in Spanish language.
[7]Acronym for Rural Tourism Hotel Occupancy Survey in Spanish language.

age, not resident in nearby municipalities, who visit the province of Burgos. The type of sampling is random, stratified by region, and the localities are sampled according to the calculated tourist poten-

tial index of each of the localities of Burgos (Table 1). The source of information, INE, does not provide data on the number of visitors disaggregated by survey area.

Table 1 | Distribution of the sample in the different zones of the province of Burgos

ZONE	TOTAL SAMPLE	PROPORTION
Arlanza	232	14.93%
Bureba-Ebro	187	12.03%
Amaya-Camino	334	21.49%
Sierra de la Demanda-Pinares	286	18.40%
Merindades	321	20.66%
Ribera del Duero	194	12.43%
TOTAL	1,554	100%

Source: Own elaboration

4. Results

The findings of this study are presented in the following three sections.

4.1. Indicators of the tourist offer

In table 2 it can be seen that in 2018 the number of hotel establishments (hotels and hostels) in

the province reached 187 establishments, representing an increase of about 8% compared to 2017, this growth being greater than that registered in Castilla y León and the national whole, a situation that shows the consolidation of the upward trend in the last three years, despite which, the number of hotel establishments is still lower than those existing in 2012 in Burgos, Castilla y León, Spain, León, Salamanca, Cuenca and Cáceres.

Table 2 | Evaluation of the total number of hotel establishments. (Comparative Data)

	Burgos	Castilla y León	Spain	Córdoba	Cuenca	León	Salamanca	Cáceres
2012	198	1,309	13,045	196	146	260	200	234
2013	184	1,260	12,794	203	128	273	193	240
2014	177	1,196	12,572	193	122	235	188	235
2015	150	1,161	12,387	191	131	239	189	220
2016	164	1,165	12,511	188	131	262	180	213
2017	173	1,141	12,444	207	131	237	184	200
2018	187	1,168	12,477	201	137	221	185	180
Variation 2017-2018	8.09%	2.37%	0.27%	-2.90%	4.58%	-6.75%	0.54%	-10.00%
Variation 2012-2018	-5.56%	-10.77%	-4.35%	2.55%	-6.16%	-15.00%	-7.50%	-23.08%

Source: Adapted from EOH elaborated by the INE

The supply of rural tourism accommodation establishments in Burgos in 2018 is higher than that existing in 2012 after the increase observed from

2016, although the increase has stagnated in the last two years (Table 3).

Table 3 | Evolution of the total number of rural tourism establishments. (Base 2005 = 100)

	Burgos	Castilla y León	Spain	Córdoba	Cuenca	León	Salamanca	Cáceres
2012	354	3,299	15,117	203	304	412	475	448
2013	362	3,373	14,544	206	281	430	503	445
2014	343	3,245	14,682	235	284	414	511	464
2015	312	3,123	14,900	214	288	368	473	467
2016	377	3,319	15,351	215	323	452	500	490
2017	375	3,374	15,709	241	310	435	493	469
2018	374	3,514	15,993	246	336	434	517	475
Variation 2017-2018	-0.27%	4.15%	1.81%	2.07%	8.39%	-0.23%	4.87%	1.28%
Variation 2012-2018	5.65%	6.52%	5.79%	21.18%	10.53%	5.34%	8.84%	6.03%

Source: Own graphics elaboration

In the table 4, the supply of food and beverage services is shown. There is a slight decrease in restaurants and an increase in the number of cafeterias, comparing the years 2017-2018 in the province. These data show the same relationship with those of the capital, there being a small decrease in restaurants and an increase in cafeterias.

Table 4 | Evolution of the restaurant supply in Burgos

	Restaurants			Cafeterias		
	Total	City	Province	Total	City	Province
2012	683	211	472	105	61	44
2013	714	216	498	106	62	44
2014	732	216	516	113	65	48
2015	741	219	522	120	71	49
2016	760	228	532	127	79	48
2017	767	229	538	131	78	53
2018	766	228	538	136	81	55
Variation 2017-2018	-0.13%	-0.44%	0.00%	3.82%	3.85%	3.77%
Variation 2012-2018	12.15%	8.06%	13.98%	29.52%	32.79%	25.00%

Source: Adapted from the Statistical Information System of the JCyL

The offer of tourist apartments, tourist camps and shelters is practically the same as in the year 2017, not being its relevant weight in the global tourist offer of the province.

4.2. Indicators of the tourist demand

In contrast, in 2018, the number of guests in rural accommodation establishments has increased by 17.5% annually and the number of overnight stays increased by 15.68% over the year 2017. In

The table 5 shows that the number of guests in Burgos has been growing since 2012, with a slight decrease in 2018, although in the whole of Spain this growth has been greater than that observed in Burgos and Castilla y León.

the period 2015-2018 the increase in guests in rural tourism is 40.86% and the number of overnight stays is 45.6%. (Table 6)

Table 5 | The number of registered guests in hotel establishments 2015-2018

	Burgos	Castilla y León	Spain
2015	814,141	4,559,683	93,216,968
2016	865,351	4,780,760	99,840,032
2017	903,956	4,953,637	103,496,999
2018	874,657	4,938,653	105,259,819
Variation 2017-2018	-3.24%	-0.30%	1.70%
Variation 2015-2018	7.43%	8.31%	12.92%

Source: Adapted from EOH elaborated by the INE

Table 6 | Comparison of the number of guests and overnight stays in rural tourism accommodation (2015-2018)

	Guests			Overnight stays		
	Burgos	Castilla y León	Spain	Burgos	Castilla y León	Spain
2015	78,106	651,916	3,264,188	161,571	1,439,413	8,825,066
2016	95,633	715,702	3,633,620	191,325	1,590,690	9,922,064
2017	93,633	748,308	4,023,983	203,363	1,663,423	10,982,083
2018	110,021	818,258	4,250,768	235,246	1,800,202	11,407,881
Variation 2017-2018	17.50%	9.35%	5.64%	15.68%	8.22%	3.88%
Variation 2015-2018	40.86%	25.52%	30.22%	45.60%	25.07%	29.27%

Source: Adapted from EOHTR elaborated by the INE

The degree of occupancy by rural tourism bed places and rooms presents a change of trend from 2014, since from 2005 to 2013 had been descending, and despite the slight increase in 2018 (1.67%) it remains at values below 20% and the average stay is 2.1 days.

4.3. Analysis of the profile and perception of the visitor in the province of Burgos

The socio-demographic profile of the visitor in the year 2018 has not changed much with respect to previous periods[8]. The most visitors to the province come from Castilla y León (22.89%), Madrid (21.51%) and the province of Vizcaya (12.27%); they travel as a family (45.01%) or as a couple (30.07%) and have an age range between 40 and 54 years (41.22%). In addition, many people choose their destination to enjoy their holidays (59.44%) compared to 78.85% in 2017, visit monuments and heritage (49.37%) and the natural environment (48.65%) compared to 65.20% in 2017; among many other aspects. The main means of transport used is still the car (81.80%) and they usually carry out the visit without previous hiring (61.89%) obtaining information from family and friends and using Internet to search for information on portals such as Google, Google Maps and Portals of municipalities. Although, only a few use Internet to contract or pay (23.68%), being Booking the main portal they use.

The visits are characterized by being short and with few expenses, focused mainly on the restoration. The degree of overall satisfaction (4.57 out of 5 in 2018, the same as in 2017, compared to 4.42 in 2014) and loyalty continues to be high to see that more than 80% have been previously in Burgos city and province. In addition, there are very high percentages of those who would recommend

[8]The data for previous periods for comparison with the data analysed in 2018 can be found in the official publications of the Burgos Tourism Observatory (https://www.ubu.es/observatorio-de-turismo-de-burgos/publicaciones).

the destination (98.80%) and those who believe that the place visited has a high tourist attraction (97.90%).

Visitors in 2018, remain highly satisfied with all aspects considered, highlighting the information points (4.31) and cultural spaces (4.26) with values slightly higher than the values obtained in 2017 (4.24 and 4.23 respectively). Aspects with a lower degree of satisfaction among visitors of the province are: the local trade (3.73) and hours of the monuments (3.89) with an increase in satisfaction in the supply of accommodation (4.15) as against (3.98) in 2017. Despite this high level of satisfaction, the main incidents reported are related to infrastructures, restaurants and bars, accommodations and the museums and monuments. Among the aspects that tourists point out to ex-

tend their stay in the province of Burgos include: more activities for children, increase cultural activities and guided tours, among others. Only 20% of visitors know the website www.turismoburgos.org although the majority (87.7%) have a good or very good assessment about it which continues to demonstrate the need to improve the channels of communication and diffusion and the placement in different sites of Burgos's province from the point of view of tourism.

By assessing visitor loyalty with the questions that appear in the following table (Table 7), very high loyalty percentages have been obtained, highlighting that 98.80% of visitors to the province recommend Burgos as a tourist destination. Likewise, the percentages of the province's potential as a tourist attraction remain very high.

Table 7 | Visitors' Loyalty (only population data for the year 2018 are shown)

Province of Burgos	2018
Before deciding on this destination, I have evaluated and compared different alternatives N = 1,409	26.50%
The area visited has a high tourist attraction N = 1,427	97.90%
I will try to return to this destination N = 1,403	96.30%
I would recommend this destination N = 1,440	98.80%

Source: Own elaboration

5. Conclusion

As a final conclusion and once it is known the importance and weight that rural tourism has in the province of Burgos, it would be highly desirable to focus resources on an increase in the promotion of the those places with the greatest potential for tourist attraction, so that they have an impact on nearby towns such as web portals, blogs and travel search engines, as well as improving all services related to catering, infrastructures, information

points and complementary activities to historical tourism in order to maximize tourist satisfaction and loyalty.

In short, this analysis allows us to obtain a general vision and to profile the characters to take into account in the design of the tourism development model of the province, so that the agents involved in tourism, such as public institutions, development companies or companies in this sector, can take decisions aimed at transforming tourism in the province of Burgos into a creative and ex-

periential tourism, thus satisfying the desires and needs of both tourism supply and demand.

The findings of this study provide decision-makers with guidance on the most effective destination management strategies to attract and satisfy tourists so that they recommend the destination. As a result, an increase in tourism demand will be achieved which, in turn, will provide socio-economic benefits in the rural areas of Burgos.

In this way, a responsible and sustainable tourism model should be created that promotes synergies for the internationalisation and loyalty of tourists, that creates an image of a destination and that promotes synergies between cultural and patrimonial heritage, through 4 strategic lines related to the 17 SDG's: environment, technology, people and territory.

Finally, one of this work's limitations is the difference between tourist supply and demand data of the province of Burgos from the INE and the SIE JCyL, which puts in evidence the reliability of this data. Likewise, there is no data about the demand of restaurants and cafes in either of these two official sources mentioned above. Similarly, the lack of data on the total number of visitors per zone in the province of Burgos makes it difficult to determine the level of significance for each survey area. Also, the results are of an exploratory nature and should be interpreted with caution due to the subjective character of the responses, as they are based on opinion surveys. To reduce this caution, some possible lines of future investigation which will drive the development and improvement of scientific progress initiated in this work are presented. In this sense, first, it is proposed to complement this study by conducting a more disaggregated regional analysis among the regions of the province that will allow different tourism policies to be developed to fit each area. Also, other complementary research could analyse the drivers influencing the final impact that tourism quality in Burgos has on overall tourism satisfaction through a structural analysis of correspondence. As for the analysis

of the evolution of tourism in Burgos, the idea is to add an analysis of employment in this sector in order to have a broader view of the evolution.

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