# Social Prosperity Perception in Cultural Tourism Destinations: the Case of Peña de Bernal, Huejotzingo and Yuanhuitlán, México

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**Abstract.** The present quantitative study with a descriptive design tries to determine the conditions of "social prosperity" of three Mexican cultural tourist destinations, Yanhuitlán, Huejotzingo and Peña de Bernal. These places face similar conditions in aspects like marginalization and poverty but with activities like tourism have tried to reverse these adverse conditions. The objective was to know the perception of their population about the improvement of their living conditions as a result of the tourist activity through the application of surveys carried out in the chosen destinations. The instrument used was a questionnaire with a Likert scale to facilitate the response of the informants and the processing of the information. For the validity and reliability of the measurement instrument a factor reduction analysis and a Cronbach's alpha were elaborated, after which a one-way ANOVA was elaborated to know the differences of means taking the Bonferroni and Scheffe tests. The results show a significant difference between the averages of destinations in how residents perceive prosperity in the selected tourist destinations.

**Keywords:** social prosperity; economy; tourism.

## Introduction

In the area of research on social prosperity (SP), there are several methods to measure it in different contexts, among them the one related to the tourism activity, which most of the times is conceive as a way to confirm the positive results of the activity specially in countries with emerging economies. This approach has been studied in developed countries where economic, environmental and social factors are adequate for the operation of tourism practice and its relation with the social prosperity of the destination (SPD). The SPD model was developed as a dimension of the competitiveness of the tourist destinations [4] that relates these variables.

The SPD from the tourism approach and its relation to competitiveness are topics of study that have managed to permeate developed countries of emerging economies [12]. However, in Mexico as it is so diverse in its tourist practices and tourist attractions, general tourist models are im-

posed mainly with the purpose of boosting the development of sun and beach tourism [19]. This approach has created patterns of behavior and development of the tourism industry by grouping them into poles or nuclei where a relevant sum of services and economic wealth is generated, but around these poles only poverty is generated in its inhabitants and a lack of basic services for the correct development and functioning of communities and people [22].

Rural communities in Mexico, like the ones chosen, are in some way dragged to this effort of develop tourism as a tool to increase economic and social development. The effectiveness of this strategy is always something that is under scrutiny for academics, authorities and the general population. *The goal of this research* to describe the factors that the resident links from his perception of the tourist activity to the social prosperity of the tourist destination according to the competitiveness approach of the destination.

That said, the present quantitative study tries to provide a better knowledge of the unique conditions of communities converted into tourist destinations with the objective of strengthening their economic development, as part of government policies that have tried to equate the development of tourism as an exit way to the conditions of poverty of many regions of the country and whose repercussions have been positive according to the results obtained here.

The following hypotheses were proposed in the present study:

$H_0$ – There are no significant differences between the means of the samples

$H_1$ – There are significant differences between the means of the samples

## Social prosperity of the tourist destination

The link between tourism and regional development has been studied [17] from the social, political, and cultural capital (SPCC) approach to how social characteristics of communities contribute to the success of sustainable tourism development [3], through innovation in the SPCC in a context of developed countries. At the same time, this model claims that there is a strong responsibility of the government [22] with the sustainable development of communities in any practical form of tourism development. The correct development of legislative policies and economic support policies allow the involvement of communities in the long term for sustainable social development [17]. From this approach the state intervention for the correct operation and regional economic development is appointed.

In the literature on destination competitiveness [2, 4, 5, 8], the assumption that has been handled is that the more competitive a destination is, the more possibilities of attracting tourists to spend more money, increasing real incomes to their residents, which means economic growth and constant economic well-being of the population [27].

Prosperity [21] speaks of the elimination of hunger, housing development, the end of poverty and injustice, the hope of a world of peace and security. Recent studies on the impact of tourism development [14, 26] have generated two streams to measure social prosperity, on one hand, the prosperity was linked to the economic spill that was made in the destiny by the tourists, leaving aside the active participation of the government and, on the other, the residents' perception of prosperity of the tourist destinations.

Another way to measure the contribution of tourism according to E. Northrop [21] is through the Gross Domestic Product (GDP). According to [26], it focuses its study on the quality of life (QOL) and classifies 4 indicators that group the benefits and tangible and intangible threats of the quality of life achieved through tourism. These indicators are directly related to the quality of life of the residents of the destination and are: economic effects, social effects, health effects and environmental effects.

According to the General Law of Social Development (LGDS) of Mexico, article 36, sets out the definition and measurement of poverty and mentions 9 indicators as follows:

1. Current income per capita

2. Average educational backwardness in the home

3. Access to health services

4. Access to social security

5. Quality and spaces of housing

6. Access to basic services in housing

7. Access to food

8. Degree of social cohesion

9. Degree of accessibility to a paved road.

The last 3 indicators were added in 2013, meaning that compliance with all these indicators generates degrees of social prosperity, however, CONEVAL (National Council for the Evaluation of Social Development Policy) has annexed education, as an indicator that allows people to harmoniously develop all their faculties [20]. For this research, a reference is made to education as a factor that helps the resident to develop themselves in the tourist field [11].

In the revised literature [6], there is a clear picture of how tourism-related education at a destination improves quality of life [11]; the increasing competition in the tourist industry between destinations and between companies in a destination are in turn factors that induce the constant training and/or tourist education; these capacities of the residents (entrepreneurs, employees and merchants) allow to formulate strategies of competitive advantage for their organizations.

Tourism is also seen as a major economic force that can help eliminate poverty [28] through

what they call ATP (anti-poverty tourism). This concept refers to any tourism development in which to eliminate poverty is its main objective. Through their research, W. Zhao and J. Ritchie [28] specifically address three determinants of poverty elimination study: Opportunity, Strengthening, and Security.

According to the United Nations Development Program [25], public services have to ensure that electricity and drinking water services are efficient and effective and are equitably distributed to the population and to tourists to ensure sustainability and reduce negative impacts on the environment.

In the same document two groups of indicators are derived: the first group allows an environment conducive to the development of tourism: transportation infrastructure, public services, telecommunications infrastructure and IT, infrastructure and tourism services, security and medical services, hotel accreditation and establishment of standards, image of the country and marketing strategies, group 2 includes human resources, investment climate and SME development, local employment, business relations, environmental and social sustainability , and preservation of cultural heritage.

Another approach to poverty reduction through tourism (Pro Poor Tourism, PPT) and as a goal of the United Nations, the PPT focuses on how tourism affects the lives of the poor and how positive impacts can be achieved through A set of interventions or strategies to reduce poverty through tourism [16].

According to [16] there are three types of PPT strategies:

1 – Increase economic benefits such as: boosting local jobs and wages, boosting local business opportunities.

2 – Improve non-financial subsistence characteristics such as: constant training, mitigate environmental impacts, improve cultural and social impacts, adequate management of natural resources, improve access to infrastructure and public services.

3 – Improve fellowship and participation such as: creating a supportive political planning framework, increasing the participation of the poor in decision-making, building a partnership with the private sector, improving information and communication flows.

In this way tourism is seen as a force that can eliminate poverty, only if it is developed and managed in a sustainable way in the economy, in the environmental, and in the socio-cultural dimension, it could improve the living conditions of people in different destinations [5, 14]. However, in most cases this activity has been seen only as a further link for economic growth [1].

Among the different approaches used for community or rural development there is the Community-Based Tourism that can promote development in emerging economies [9, 10] and has been used in international cooperation projects as a tool to facilitate poverty reduction. The main objective of community-based tourism development is the implementation of strategies that link the need to reduce poverty with a decentralization of the structures that control the flow of tourism [9], which also generates benefits for not only economic, but also social by increasing the access to better public services [12].

The World Tourism Organization claims that sustainable tourism can be a tool for economic development and poverty reduction, diversification of tourism goods and services in communities, by creating economic opportunities in marginalized areas and building strategies based on culture, local community life and landscaping [18].

The community-based business or community-based approach can benefit the community broadly and lead to long-term development; however, community-based tourism enterprises are being evaluated through the creation indispensable factors in economic and social development in communities, bringing as a benefit the economic, educational and public services improvement [12, 18].

The formation and participation of community companies is a new approach that is being consolidated because is helping to provide better standards of quality of life in the community, however, many times the community itself has limitations such as lack of human capital to help strengthen the community organization; according to [12], there must be an external intervention link that allows the community to hire specialized human capital to help the proper functioning and development of such companies and thus achieve success in all aspects involving a community. In this way, the creation of community enterprises can be a way forward in the task of elimination of poverty.

On the other hand, the development of cultural tourism has led many destinations to start their tourism activity by promoting their tangible and intangible cultural heritage and that these goods can be transformed into tourism products; the result of this change is given as a process of tourist massification that has positive and negative effects on the quality of life of the residents, however, much of the literature focuses on the positive economic impacts leaving aside the non-economic benefits that help even more the community in ways such as the strengthening of the local identity or, on the contrary, ignoring the negative impacts as the loss of the local identity [15, 26].

Finally, and for the purposes of this research, social prosperity is conceptualized as a constant development of human groups based on the equitable and fair distribution of wealth, a constant improvement in the quality and access of the services that are provided to the people, in addition to the development of infrastructure which also improves the living conditions of everybody in the community.

## Methodology

A quantitative method with a descriptive design and a transverse temporal dimension was used to carry out this research; three cultural tourist destinations were selected, Peña de Bernal in the state of Querétaro, Huejotzingo in the state of Puebla and Yanhuitlán in the state of Oaxaca, which share some conditions of marginalization and poverty and where tourism activity has been, from the governmental perspective, an important element to promote the advance in the socioeconomic development in situ. In addition, the sample was selected for the similar characteristics in the natural, cultural, historical and social dimensions that these destinations have. Previous experiences reinforce the intention to include this number of destinations like the recommendation of M. Enright and J. Newyon [8] who states that in order to make a statistical analysis of tourist competitiveness it is necessary to evaluate and compare at least 3 destinations.

The list below shows the destinations chose and some of the characteristics indicated above:

1. *Peña de Bernal, Querétaro.* This destination is located at the gateway to the Route of the Sierra Gorda, considered as part of the program of Magic Towns of the Secretary of Tourism. It has

traditions that are included in the list of cultural heritage of mankind according to the UNESCO [24].

2. *Huejotzingo, Puebla.* It stands out for its monastery of the XVI century and the carnival that celebrates to remember the battle of 5 of May in Puebla (an important Mexican celebration).

3. *Yanhuitlán, Oaxaca.* It has a Dominican monastery of the sixteenth century which is also a museum authorized and sponsored by the INAH (National Institute of Anthropology and History).

In this investigation, the non-probabilistic convenience sampling type was used, since there are no exact quantitative data of the number of residents in each of the destinations. To meet the statistical criteria for analysis of parametric data requires a sample of N = 30 minimum, so it was decided to select an average sample size of 35 people for each of the places in the sample. The information or response units were 105 questionnaires for residents of destinations using the face-to-face modality for data collection.

To compare the three destinations, we used the statistical analysis called ANOVA of a Factor. For the statistical analysis, SPSS ver. 22 was used and as a first step of each dimension a factorial analysis were conducted consisting of a factor reduction analysis (KMO=.693; Bartlett's Sphericity=498.65; p=.000; see table 1); the analysis of Cronbach's alpha reliability was also used and showed $\alpha$=.642. The analysis of variance of a factor, was applied to obtain the results of which destination is perceived more prosperous by residents in a comparison of statistical means.

Prosperity was operationally defined as the degree to which the inhabitants of tourist destinations have improved their living conditions by infrastructure development, quality in basic services, distribution of wealth related to the tourist activity of the destination and access to new products and services.

The design of the measurement instrument of this research is a semi-structured questionnaire containing 4 questions for socio-demographic data and 18 for measuring social prosperity of the destination using a Likert scale of 1 to 5 to facilitate responses, where 1 = has not improved nothing; 2 = almost no improvement; 3 = has improved a little; 4 = has improved a lot; 5 = has improved way too much. Residents are asked, from their perception, if their living conditions have improved since the community declared

themselves as a tourist destination and the overall percentage of improving their quality of life, divided into four fundamental factors that build up the prosperity of destinations: *Wealth distribution; Quality of services; Infrastructure development; Access to basic services.*

## Results

According to the results of the ANOVA analysis, we found that Prosperity among the three sites have significant differences (MC = 5.75, F = 52.01, gl = 2, p = .000). In the *distribution of wealth factor*, significant differences were found in the three destinations (MC=24.27, F=57.11, gl=2, p=.000). In the *quality of services factor*, significant differences were also found between the three sites (MC=10,726, F=18.37, gl=2, p=.000). Regarding *infrastructure development*, a significant difference of means between the three destinations was not found (MC=.522, F=1.009, gl=2, p=.368). In the access to basic services factor no significant differences were found between the three destinations (MC=.131, F=.431, gl=2, p=.651). The post-hoc test (Scheffe and Bonferron, see Table 1) was used to corroborate the difference of means between the destinations.

Table 1 − Rotated component matrix. Social prosperity

| Since this place was declared as a tourist destination how much has improved the: | Factor 1 Wealth distribution | Factor 2 Quality of services | Factor 3 Infrastructure development | Factor 4 Access to basic services | Communities |
|---|---|---|---|---|---|
| PRO1. Your income from the arrival of tourists | **0.785** | 0.351 | -0.068 | 0.081 | 0.750 |
| PRO2. Your housing for the income generated by tourism | **0.789** | 0.342 | -0.036 | -0.013 | 0.742 |
| PRO3. The roads | 0.098 | -0.212 | **0.757** | 0.031 | 0.628 |
| PRO5. Street lighting | -0.360 | 0.002 | **0.682** | 0.130 | 0.612 |
| PRO6. Quality and accessibility of health services | 0.130 | **0.884** | 0.006 | 0.039 | 0.799 |
| PRO7. Timely and effective health services | 0.222 | **0.840** | 0.169 | -0.050 | 0.787 |
| PRO9. Access to purified water | 0.081 | -0.272 | 0.148 | **0.710** | 0.606 |
| PRO10. Access to electricity | -0.444 | 0.096 | -0.162 | **0.662** | 0.672 |
| PRO11. Drain service available | 0.240 | 0.212 | -0.072 | **0.717** | 0.621 |
| PRO12. Quality of education services | 0.215 | **0.587** | -0.203 | 0.020 | 0.432 |
| PRO13. Your education related to tourism | **0.749** | 0.028 | -0.066 | -0.054 | 0.570 |
| PRO17. Education and tourism infrastructure construction | 0.172 | 0.191 | **0.593** | -0.195 | 0.456 |
| PRO18. Your overall quality of life | **0.737** | 0.173 | 0.280 | 0.183 | 0.685 |
| | | | | | |
| Variance by factor | 22.196 | 17.785 | 12.319 | 11.994 | |
| Total variance explained | | | | 64.294 | |
| KMO | | | | .693 | |
| Bartlett´s sphericity | | | | 498.65 | P=.000 |
| Cronbach´s Alpha | | | | .642 | |

Note: Extraction method: main component analysis. Rotation method − Varimax with Kaiser normalization. The rotation has converged in 6 iterations.

The results of the analysis of variance (ANOVA) of the Prosperity variable between groups found a significant difference between 1=Yanhuitlán where people perceived that nothing has improved or almost not improved, 2=Huejotzingo where almost nothing has improved or has improved a little and 3=Peña de Bernal, that has improved a little or has improved a lot. This difference of means (DM1=2.72, DM2=2.99, DM3=3.52) related to social prosperity allows us to observe how a destination managed correctly for the operation of tourism is also perceived by its residents as prosperous in the socio-economic sphere.

The *distribution of wealth*, it was found that the variance between groups has significant difference (MC=24.27, F=57.117, p=.000) the comparison of means between sites (DM1=2.03, DM2=2.62, DM3=3.68) in this factor shows that in Yanhuitlán it "has not improved anything and almost has not improved"; in Huejotzingo was perceived as "almost has not improved and has improved little"; In Peña de Bernal the distribution of wealth was perceived between "it has improved and it has improved a lot". Yanhuitlán's wealth distribution has a negative perception compared to Peña de Bernal, where is widely distributed among different demographic and social groups.

The *quality of the services* was found to be significantly different (MC=10.72, F=18.37, p=.000) among the means of the group, that is, the quality in Peña de Bernal is higher than it is in Yanhuitlán. However, in the *infrastructure development* and *access to basic services*, no difference in means was found, so this shows that residents of the destinations do not perceive an increase in infrastructure development, as well as access to basic services.

Table 2 – Multiple comparisons

| Dependent Variable | | (I) PLACE | (J) PLACE | Difference of means (I-J) | Standard error | Sig. | 95% of confidence interval | |
|---|---|---|---|---|---|---|---|---|
| | | | | | | | Lower limit | Upper limit |
| Prosperity | Scheffe | 1.00 | 2.00 | -.27332* | .07896 | .003 | -.4695 | -.0772 |
| | | | 3.00 | -.80028* | .07954 | .000 | -.9979 | -.6027 |
| | | 2.00 | 1.00 | .27332* | .07896 | .003 | .0772 | .4695 |
| | | | 3.00 | -.52696* | .08009 | .000 | -.7259 | -.3280 |
| | | 3.00 | 1.00 | .80028* | .07954 | .000 | .6027 | .9979 |
| | | | 2.00 | .52696* | .08009 | .000 | .3280 | .7259 |
| | Bonferroni | 1.00 | 2.00 | -.27332* | .07896 | .002 | -.4655 | -.0811 |
| | | | 3.00 | -.80028* | .07954 | .000 | -.9939 | -.6067 |
| | | 2.00 | 1.00 | .27332* | .07896 | .002 | .0811 | .4655 |
| | | | 3.00 | -.52696* | .08009 | .000 | -.7219 | -.3320 |
| | | 3.00 | 1.00 | .80028* | .07954 | .000 | .6067 | .9939 |
| | | | 2.00 | .52696* | .08009 | .000 | .3320 | .7219 |
| Wealth distribution | Scheffe | 1.00 | 2.00 | -.59385* | .15476 | .001 | -.9783 | -.2094 |
| | | | 3.00 | -1.64910* | .15591 | .000 | -2.0364 | -1.2618 |
| | | 2.00 | 1.00 | .59385* | .15476 | .001 | .2094 | .9783 |
| | | | 3.00 | -1.05525* | .15699 | .000 | -1.4452 | -.6653 |
| | | 3.00 | 1.00 | 1.64910* | .15591 | .000 | 1.2618 | 2.0364 |
| | | | 2.00 | 1.05525* | .15699 | .000 | .6653 | 1.4452 |
| | Bonferroni | 1.00 | 2.00 | -.59385* | .15476 | .001 | -.9706 | -.2171 |
| | | | 3.00 | -1.64910* | .15591 | .000 | -2.0286 | -1.2696 |
| | | 2.00 | 1.00 | .59385* | .15476 | .001 | .2171 | .9706 |
| | | | 3.00 | -1.05525* | .15699 | .000 | -1.4374 | -.6731 |
| | | 3.00 | 1.00 | 1.64910* | .15591 | .000 | 1.2696 | 2.0286 |
| | | | 2.00 | 1.05525* | .15699 | .000 | .6731 | 1.4374 |

Table 2 (continued)

| Dependent Variable | | (I) PLACE | (J) PLACE | Difference of means (I-J) | Standard error | Sig. | 95% of confidence interval | |
|---|---|---|---|---|---|---|---|---|
| | | | | | | | Lower limit | Upper limit |
| Quality of services | Scheffe | 1.00 | 2.00 | -.56164* | .18137 | .010 | -1.0122 | -.1111 |
| | | | 3.00 | -1.10730* | .18272 | .000 | -1.5612 | -.6534 |
| | | 2.00 | 1.00 | .56164* | .18137 | .010 | .1111 | 1.0122 |
| | | | 3.00 | -.54566* | .18398 | .015 | -1.0027 | -.0886 |
| | | 3.00 | 1.00 | 1.10730* | .18272 | .000 | .6534 | 1.5612 |
| | | | 2.00 | .54566* | .18398 | .015 | .0886 | 1.0027 |
| | Bonferroni | 1.00 | 2.00 | -.56164* | .18137 | .008 | -1.0031 | -.1202 |
| | | | 3.00 | -1.10730* | .18272 | .000 | -1.5521 | -.6625 |
| | | 2.00 | 1.00 | .56164* | .18137 | .008 | .1202 | 1.0031 |
| | | | 3.00 | -.54566* | .18398 | .011 | -.9935 | -.0978 |
| | | 3.00 | 1.00 | 1.10730* | .18272 | .000 | .6625 | 1.5521 |
| | | | 2.00 | .54566* | .18398 | .011 | .0978 | .9935 |
| Infrastructure development | Scheffe | 1.00 | 2.00 | .05529 | .17079 | .949 | -.3690 | .4796 |
| | | | 3.00 | -.18028 | .17206 | .579 | -.6077 | .2471 |
| | | 2.00 | 1.00 | -.05529 | .17079 | .949 | -.4796 | .3690 |
| | | | 3.00 | -.23557 | .17325 | .400 | -.6660 | .1948 |
| | | 3.00 | 1.00 | .18028 | .17206 | .579 | -.2471 | .6077 |
| | | | 2.00 | .23557 | .17325 | .400 | -.1948 | .6660 |
| | Bonferroni | 1.00 | 2.00 | .05529 | .17079 | 1.000 | -.3604 | .4710 |
| | | | 3.00 | -.18028 | .17206 | .892 | -.5991 | .2385 |
| | | 2.00 | 1.00 | -.05529 | .17079 | 1.000 | -.4710 | .3604 |
| | | | 3.00 | -.23557 | .17325 | .531 | -.6573 | .1861 |
| | | 3.00 | 1.00 | .18028 | .17206 | .892 | -.2385 | .5991 |
| | | | 2.00 | .23557 | .17325 | .531 | -.1861 | .6573 |
| Access to basic services | Scheffe | 1.00 | 2.00 | .11376 | .13087 | .686 | -.2113 | .4389 |
| | | | 3.00 | .01852 | .13185 | .990 | -.3090 | .3460 |
| | | 2.00 | 1.00 | -.11376 | .13087 | .686 | -.4389 | .2113 |
| | | | 3.00 | -.09524 | .13276 | .774 | -.4250 | .2345 |
| | | 3.00 | 1.00 | -.01852 | .13185 | .990 | -.3460 | .3090 |
| | | | 2.00 | .09524 | .13276 | .774 | -.2345 | .4250 |
| | Bonferroni | 1.00 | 2.00 | .11376 | .13087 | 1.000 | -.2048 | .4323 |
| | | | 3.00 | .01852 | .13185 | 1.000 | -.3024 | .3394 |
| | | 2.00 | 1.00 | -.11376 | .13087 | 1.000 | -.4323 | .2048 |
| | | | 3.00 | -.09524 | .13276 | 1.000 | -.4184 | .2279 |
| | | 3.00 | 1.00 | -.01852 | .13185 | 1.000 | -.3394 | .3024 |
| | | | 2.00 | .09524 | .13276 | 1.000 | -.2279 | .4184 |

Note: * - the mean difference is significant at the level 0.05.

According to the alternative hypothesis $H_1$=There are significant differences between the means of the samples, a variance analysis (ANOVA) of one factor was developed, not rejecting the $H_1$, that is, the perception of social prosperity in the selected destinations is different in the means of the samples, so that the analysis between 1=Yanhuitlán, 2=Huejotzingo and 3=Peña de Bernal shows that there are significant differ-

ences, thus the perception of the prosperity for the sample of residents of Peña del Bernal is bigger than Yanhuitlán and Huejotzingo.

## Conclusions

Tourism as an economic activity has multiple repercussions in all the dimensions that surround the social whole. Government policies in develop-

ing countries have generally been a promoter of tourism as a key element for improving the adverse conditions of quality of life of its population in general and especially in rural areas where these conditions are even more critical. The strategy of creating cultural tourism products of communities with some traditions or historical legacy has had a relative success in some communities and in others it just hasn´t changed their quality of life.

This is corroborated by the mixed results obtained in this research that shows both positive and negative outcomes, proving that there is still a long way to go. As an example, the results show that the residents of Peña de Bernal have noticed a change in the distribution of wealth and this has been associated with an increase in their in-

come due to the arrival of tourists, as well as the improvement of the dwelling of the residents, in addition, an important element according to the literature, education, is seen as a key factor in the development of the residents to improve their quality of life. But on the other hand, the community of Yanhuitlán hasn´t noticed any changed in the distribution of wealth yet, so this is an attention call for the people and authorities responsible of this condition.

Therefore, it is concluded that the competitiveness of destination in cultural tourism communities is a factor that generates social benefits in the destination, as long as it is managed in a correct way involving different stakeholders like civil organizations, the government, local residents and entrepreneurs.

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