Profile, characterization and estimation of expenditure of the flows of visitors to Santander

1. Visitors Behaviour Measurement and Deconstruction of Tourism Destinations Demand

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Abstract

Tourism is one of the transversal axes of the development plan and aims by 2015 to turn Santander (Colombia) in a world-class destination. In the period 2013-2015, a group of tourism mega-projects will be completed which will generate significant opportunities for the region, due to the arrival of new flows of domestic and international visitors, attracted by a tourist offer with multiple possibilities. One of the research projects included in the Santander Tourist Information System - Situr Santander has as its main purpose knowing the characteristics of the flow of visitors to and the estimation of the expenditure incurred (inbound tourism). This measure aims to provide information related to tourism from the perspective of demand, taking as study variables the associated aspects of the sociodemographic characteristics of visitors, as well as activities and expenses incurred during their stay in this region of Colombia. This paper aims to share the experiences of the methodological design, the collection and analysis of the data and the way the information will be available. It includes some findings considered relevant.

Background

In Colombia, tourism is considered one of the sectors with the greatest potential to contribute significantly to the development and sustainable growth of the economy, for being an industry with great potential to create jobs and prosperity in the regions. This fact is what motivates the actors responsible for making tourism a competitive sector, to work in an articulated and prioritized manner in order to take advantage of opportunities arising from the advantages of being the second most biodiverse country in the world, the number ONE in birds and orchids also we keep ancestral cultures and have natural, cultural and historical valuable to all visitors.

Santander is a department located in northeastern Colombia, also favored by natural biodiversity, historic and cultural heritage. Tourism is one of the transversal axes of the Development Plan and aims by 2015 to turn Santander in a world-class destination. To achieve this, we work in three major purposes: connectivity, productivity and competitiveness.

Since 2006 (December) with the opening of Chicamocha National Park, visitor arrivals to Santander increased significantly. It is expected in the 2013-2015 period, profound changes in the tourism
industry, because of the completion of a group of tourist megaprojects that will generate significant opportunities for the region, product of the arrival of new flows of domestic and international visitors attracted by new proposals with multiple activities in the following types of tourism:

1. **Turismo personal. Vacaciones – Ocio – Recreación**

   - **Adventure Tourism:** Metropolitan Paragliding Park in Ruitoque (2014) (Paragliding) and Roads Recovery from Lenguerke Zapatoca to Barichara (2014) (Hiking).
   - **Nature Tourism** Natural Regional Park Santurbán (Recently declared natural Park) in the region of Soto (ecotourism), Yarigua Park Natural Reserve and Mesa de los Santos (Birdwatching) and Coffee farms in Mesa de los Santos and the Guanenta Province (Rural Tourism)
   - **Health and Wellness Tourism:** Free trade hospital zone Cardiovascular Foundation of Colombia in Piedecuesta (2015) and the permanent Free Trade Zone Fosunab Foundation in Floridablanca (2014).
   - **Nautical Tourism:** : Bucaramanga Reservoir (2015) and the Hidrosogamoso Dam (2014)
   - **Cultural and heritage tourism:** East Cultural Center (2014)
   - **Geotourism:** Chicamocha Canyon proposed to enter Geoparks Network sponsored by UNESCO (2015)

2. **Business and Professional Tourism**

   - **Events and conventions Tourism:** Metropolitan Convention Center of Bucaramanga (2014)

Under these conditions, the Santander tourism is an economic sector with many possibilities to achieve, in the coming years better participation in the regional GDP. However, It hasn’t been studied yet the impact that the completion of the Macro-projects will have in the regional economy, the natural environment and the welfare of the communities involved. It is generally recognized that the arrival of new visitors flows will generate new challenges, but it is remarkable, the lack of reliable information of tourist activity, considered an essential input in the formulation of government policies and business strategies that allow the early identification and development of opportunities for the region and to be ready to successfully face the problems that can arise from this new reality.

**Introduction**

The **Santander Tourist information System – Situr - Santander** is the answer to the lack of information about the region’s tourist activity. It contemplates implementing progressively over the next few years, research projects aimed at studying the impact of tourism on various levels of regional administrative structure. In the first phase (2013), four projects were designed and implemented aimed at studying **tourism as an economic sector** from the perspective of demand and supply.

Specifically, in relation to the study of the movement of people from their place of origin to a destination (demand), was addressed in two projects:

- Study of the flows of visitors arriving to Santander and the estimation of the expenditure (inbound tourism). This measurement, aims to provide information related to tourism from the perspective

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1 See paper MOVE 2013 “Santander Tourist Information System _ Situr Santander Colombia”
of demand, taking as research variables all of the aspects associated with the characteristics of visitors and tour groups, during the visit, means of transport used, activities, purchase of goods and services, use of media and evaluation of experience in Santander.

- Study the trips made by residents in Santander to other municipalities (domestic tourism) and other domestic and international destinations (outbound tourism). The study variables are similar to those of inbound tourism.

Profile study, characterization and estimation of expenditure of the flows of visitors to Santander

The purpose, to provide information about Santander that allows to know and understand the flow of visitors who come to this region of Colombia and estimate the expenditure level, allowing the identification of new market segments, to find innovative ideas to improve existing tourism products, display more effective channels to reach target audiences of interest, identify problems and anticipate trends. This knowledge should serve as a reference for government agencies to design plans for tourism development, employers to improve their market supply and the community to understand the importance of providing the best conditions for visitors to turn Santander in a sustainable competitive destination.

Framework

It is highlighted that the measurements related to the study of the flow of visitors to the region, have gained attention among researchers. It is highlighted the contributions in various scenarios such as the International Conference on Measuring Tourism Economic Contribution at Sub-National Levels in the city of Malaga Spain (2008), the First International Conference on the Measurement and Economic Analysis of Regional Tourism in Donostia Spain (2009), the Second Conference on the Measurement and Economic Analysis of Regional Tourism – MOVE in Bilbao Spain (2011) and the First Regional Seminar on Tourism in Venice Italy (2012).

Situr - Santander for the development of research projects, took as a reference conceptual and methodological guidelines and recommendations set by the World Tourism Organization (UNWTO), specifically in relation to the conceptual framework for the Tourism Satellite Account (TSA): Recommended Methodological Framework (CST: RMF 2008) and the proposal of the International Network on Regional Economics, Mobility and Tourism (INRouTe) – World Tourism Organization (UNWTO) “A closer look at the Tourism: Subnational Measurement and Analysis - Towards a set of WTO Guidelines”. Also incorporated contributions made by various researchers in academic events that have addressed the issue of measurement of tourism at the subnational level.

Specific research objectives

To study the profile, characterization and estimation of the expenditure of visitor flows to Santander, the following research topics were raised:

A. Socio-demographic profile of the visitors
   To know the profile of the visitors involves identifying the origin (place where they perform their usual activities), determining the place of birth, knowing the gender, age, educational level and work activity. Annual income variable not included due to the difficulty to obtain this data in Colombia.

B. Travel group profile
   Although visitors are the center of attention of tourism, so is the tour group, consisting of all (group) who made a trip and share expenses. To know the profile of the tour group requires the identification of the relationship of the members of the group and the number of members. You
should also consider the solo travelers or the ones who travel in groups composed of several people or travel groups.

C. **Reason for the trip**
The main reason for the trip is defined as the cause without which the trip had not been performed. For this data, is taken as reference the classification proposed in IRTS (2008)\(^2\) in Section 3.17 and the recommendations of the B.1. For each reason are defined the categories of time and frequency in order to exclude travelers who are not considered visitors.

D. **Places and activities performed during the visit**
The places visited and activities undertaken by the group travel while in Santander, allow us to identify the type of higher-value experiences for visitors. The knowledge of this aspect of the trip, seeks to determine the number of municipalities visited from the time of entry to Santander until the departure, identifying the main destination (town or place), the order in which they were visited and the activities undertaken in each municipality (IRTS 2008 Annex 3).

E. **Length of stay**
The length of the trip or the group’s visit is essential to estimate the demand for tourist services and the expenditure. In each village visited knowledge of the length of stay in hours, days or nights. The overnight trips are categorized by the length of stay.

F. **Transport and accommodation type**
Transportation refers to the primary medium used for the displacement in Santander. Accommodation is required by visitors when they spend the night, which is why is necessary to know the various options used. (IRTS 2008 Annex 3). It includes accommodations unrelated to the market as is the service provided by relatives or on their own or in cases where this service is not requested (backpackers).

G. **Estimated expenditure before, during and after the trip**
Tourist expenditure corresponds to the amounts paid by visitors or reimbursed by others, due to the acquisition of consumption goods and services and valuable objects, for personal use or as gifts before and during the trip to Santander, taking into account the recommendations on exclusions (IRTS 2008 Chapter 4 Paragraph A). It is important to identify, if the expenses are part of a tour package and which group members took on the trip expenses. Likewise, the total cost estimate divided by each of the components (IRTS 2008 Chapter 4 Paragraph D) and the recommendations provided for output measurement (IRTS 2008 Chapter 4 Paragraph D).

H. **Measuring the level of satisfaction of the journey and experience rating**
The satisfaction measurement seek to know the assessment of the contrast the visitor make between their expectations before arriving to Santander and the experiences that occurred during their stay, classified by category of services, environmental factors, types of activities, tourism infrastructure and frequency of visits. It is also important to know the behavior of the visitors in relation to the possibility of re-elect as a destination or recommend Santander.

I. **Communication channels used before, during and after the trip**
The media play a key role in promoting tourist destinations, to know how the visitors gathered information from Santander before making the trip, allows identifying the most effective channels to reach target markets. The digital and social era, has allowed visitors to search for information, share experiences and express opinions, which is why is considered essential to know the use of these media during and after the trip.

**Methodology**

The profile study, characterization and estimation of expenditure of the flows of visitors to Santander, takes the following methodological elements:

• **Research Design**: Research is conclusive at the descriptive level, adopts a crossover design in several representative samples adjusted for seasonality.

• **Data collection instrument's design**: The instrument developed for data collection to study the profile and the estimated visitor expenditure to Santander, includes a set of structured questions in two questionnaires:

  - Questionnaire to collect traveler data
    - This instrument collects data to meet specific goals A - B and is divided into the following parts:
      - Part A. Identification of respondents
      - Part B. administrative data
      - Part C. Sociodemographic data - Total Questions: 7

  - Questionnaire to collect data of the travel group
    - This instrument collects data to meet specific objectives B-D-E-F-G-H-I and is divided into the following parts:
      - Part A. Characteristics of people visiting Santander - Total Questions: 3
      - Part B. Typology of the travel group - Total Questions: 2
      - Part C. Main purpose of the trip - Total Questions: 1
      - Part D. Visited places, activities performed, length of stay, type of accommodation and transportation - Total Questions: 5
      - Part E. Gastos antes y durante el viaje a Santander – Total de preguntas: 18
      - Part F. Satisfaction assessment of the trip - Total Questions: 6
      - Part G. Use of media before, during and after travel - Total Questions: 5

• **Sample design**

  - **Universe**: all non-residents traveling to Santander for any reason.
  - **Study population**: nonresident people in Santander that targets this department, with an under one year stay and any main purpose for the trip (leisure, business, or any other reason), other than being an employee of a resident entity in the region.
  - **Coverage and geographical breakdown**: Bucaramanga, Chicamocha National Park (Aratoca), San Gil and Barichara, locations where tourist activity is concentrated in Santander.
  - **Population element**: Travelers in a first stage and then exclude those who do not meet the quality of visitor (are classified as a tourist, if your trip includes an overnight stay or as a day visitor (or hiker) otherwise).
  - **Statistical unit**: Visitor – Travel Group
  - **Reference period**: Monthly
  - **Collection period**: Weekly
  - **Sample frame**: It is defined by all non-resident visitors (tourists and hikers) who visit and are in the Chicamocha National Park (Aratoca), Bucaramanga (hotels and transportation terminals), San Gil (Hosting sites and The Gallineral Park) and Barichara (Tourist Point).
  - **Data collection Method**: taking as a reference the statistical units of the target population, the selection of respondents, will be done with the following procedure:
    - Phase I
      - One of the necessary conditions to ensure the validity and reliability of the data collected is to ensure that the respondent meets the conditions of what is considered a visitor. As in the places defined to contact the target population is not possible by simple observation, to identify who are travelers, the interviewer by systematic sampling contacts travel groups. In a control sheet registers the travel group size within the group and how many are living in Santander or how many are not, ranked over and under 15 years. Then apply to the
members of the travel group not resident in Santander (over 15 years) a short survey that collects demographic characteristics, at the departure of Santander, name, email address and permission to once they get to their home, send a link to a survey in digital format.

Phase II
Given the number and complexity of the data required to meet the proposed objectives and given the impossibility to locate travelers at the time of their departure from Santander, to each one is sent to the e-mail provided a link to a survey that includes security password. The questionnaire sent automatically adapts to different types of travelers and is easy to process and refer.

Once the completed questionnaires are received, it is verified if members of the same travel group responded to the survey sent, in this case, it is only taken into account the questionnaire that has the best description of the expenses incurred and will be complemented with information provided by the other related activities undertaken, if relevant.

- Sample size: takes as a reference the timing of visitor flows to Santander. For the offseason sample size was estimated at 800 tour groups (monthly) and to the peak seasons 1600 travel groups (monthly), foreseeing an error not exceeding 5% and a confidence level of 95%.

- Fieldwork Plan

The instrument of data collection is accompanied by instructions for filling out and basic concepts, which will guide the field work. Also was drafted a manual which describes in detail the procedures for the formation of the working group and data collection.

- Data analysis plan

A manual was drafted, describing the procedures related to the validation and consistency of the data collected, quality control of the methodology used in the study and the analysis and discussion of the data.

- Information dissemination:

A preliminary review of tourism observatories in the world, allowed concluding that all documents provide information with relatively easy access for users, but only allowed to see the perspective of researchers. To overcome this difficulty, this project will use a technology platform available on the web that allow users to access data not only on documents, but the possibility to use an application where the user can customize the statistical analysis, edit and print graphics, have access to computer graphics, learn how to interpret the results, plus the ability in the future to access applications on mobile devices.

Results

The data collection was carried out monthly since December 2012. 18,000 Travelers have been contacted (data collection phase I) and 4,800 completed surveys have been received via web (data collection phase II) corresponding to travel group data. The data collected are in the statistical parameters initially planned: confidence level of 95% and an allowed error lower than 5%. The results of the study "Profile, characterization and estimation of expenditure flows of visitors to Santander" will be available on the website of the Santander Tourist Information System - Situr Santander starting from November 2013.

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3 See detail in paper MOVE 2013 "Santander Tourist Information System , Situr Santander Colombia"
As previously mentioned, was the lack of data related to the activities of the tourism industry in Santander, which inspired the design and implementation of Situr Santander, which is why the results of all investigations will be the first contribution in the region considered unreleased, because there was no previous similar experience. The following is a brief mention of the most relevant findings.

**Figure 1. Origin of the visitors to Santander**

**Visitors Profile**

It is emphasized that the promotion of Santander as a tourist destination has not obeyed a structured plan and focused on pre-defined target markets. On the contrary, the arrival of visitors has been due to the natural attractions and historical and cultural heritage. Coordinated actions are not visible, product of the integration of efforts from government agencies and unions to turn this region into a competitive destination.

Knowing the profile of the visitors is a key activity in the process of understanding their needs and expectations, as well as to determine the origin, i.e., the usual place where they perform everyday activities.

Half of the visitors who have arrived to Santander have their residence in the city of Bogota (Colombia capital district) which along with three bordering departments (Antioquia, Northern Santander and Boyaca) contribute with 70% of the 260,000 people who have come to this region in the period December 2012 - September 2013. It is notable that the remaining 30% visitors from all other regions of Colombia. (See figure 1)

The arrival of foreign tourists is one of the most important indicators in the future of tourism in Santander. In the study period, out of 100 visitors only six are residents in countries other than Colombia.

**Graph 1. Travel Group Size**

**Travel Group profile**

When the visitors arrive at a tourist destination they can do it alone or in travel groups sharing some affinity and expenses.
Identifying the tour group sizes is very useful information to design products and tourist services, by allowing, for example, assess, and condition the infrastructure requirements to meet their needs and expectations.

Of ten travel groups coming to Santander, 42% have an average of two or three members, another 42% between four and six, 15% over seven and only 1% is traveling alone. The average size of travel groups is four members (See Graph 1)

Graph 2. List of members of the tour group

Type of travel group

The members of the tour group always have some affinity, aspect that determines the activities to be performed and the expense associated with the acquisition of products and services to meet their needs.

The study's findings allow us to confirm that out of ten travel groups, nine have family members. (See Graph 2.)

Graph 3. Reasons for the trip

Reasons for the trip

The main reason for traveling is defined as the cause without which the trip had not been made. The knowledge of this indicator will be of great importance for Santander in the future, keeping in mind that the completion of mega projects in construction, will allow the arrival of new flows of visitors, attracted by different proposals that will be available in a few years.

So far, it is notable that nine out of ten travel groups see Santander as an attractive destination to enjoy family holidays with passive entertainment activities. As can be observed in graph 4, the participation of other reasons, it's still hardly representative, however, it's expected to change dramatically in the coming years. (See Graph 3.)

Figure 2. Main Destination
Main Destination
Knowing the places visited by the tour group and identifying the activities undertaken during their stay in Santander, it allows us to identify the higher valued experiences for visitors.

Traditionally, tourism has been concentrated in the city of San Gil, considered the tourist capital of Santander. In late 2006, Chicamocha National Park opened, fact that has allowed Bucaramanga (capital of Santander) to progressively become the main destination.

This situation becomes visible by observing that in ten travel groups, three have preferred Bucaramanga as the main destination. Is expected over the coming years, to increase such participation because most tourist macro projects are being built very close to its Metropolitan (See figure 2).

Graph 4. Number of municipalities Santander visited

Municipalities visited
It is noteworthy that a region is more attractive, if visitors find many attractions that can respond to the expectations of the tour group members.

The knowledge of this aspect of the trips to Santander, entails determining the number of municipalities visited from the time of entry until their departure and the order they were visited also the activities undertaken in each, in order to identify the top rated attractions.

As can be seen in Figure 4, half of the groups visit between two and three municipalities, while 40% do so between four and six municipalities, only one in ten, chooses specifically a place.

Graph 5. Length of stay
Length of Stay
The estimation of the demand for tourist services and the expenditure incurred by tour groups requires the knowledge of the length of the trip in each municipality, measured in hours, days or nights. This value identifies the type of stay.
15% of tour groups didn’t stay overnight in Santander. The third part of tour groups stayed overnight one to two nights, while 41% did so three to five nights. It highlights that 15% of the groups stayed over six nights. (See Graph 5)

Graph 6. Sources of information before coming to Santander
Sources of information before coming to Santander
The promotion of a tourist destination is fundamental to progressively increase visitor arrivals to a region.

As already mentioned, in Santander there aren’t designed coordinated activities oriented to position Santander as an attractive differentiated destination. The efforts made were only non-integrated government or private initiatives.

As can be seen in Figure 6, is notable that about half of the tour groups chose Santander as a holiday destination, especially for recommendations from friends or family. It is emphasized that out of ten travel groups, three have looked for information on the Internet or specialized websites. Also, it is noteworthy that two had already come another time. The importance of traditional media as a means of pre-trip information is remarkably little.

Graph 7. Sources of information during the stay in Santander
Sources of information during the stay in Santander
The travel groups during their stay in a destination would like to have more information of interest about how to access products and services to meet their needs.

The research results lead to the conclusion that the tour groups have as major sources of information personnel hosting site or search on the internet. Other important sources are family, friends or simply interacting with other travel groups. (See Graph 7)

Graph 8. Use of social networks before and during the stay in Santander
Use of social networks before and during the stay in Santander The digital and social era has provided visitors with the ability to share real-time experiences from their stay in a destination.
In this sense, identifying the networks used by visitors is a very important aspect in order to track the comments shared, as well as to notice the problems encountered by visitors during their stay.

It is noteworthy that out of ten travel groups, one of seven members used social networks to share comments. It is observed that Facebook is the most used network, while only one in every ten groups uses Twitter. (See Graph 8)

Assessment of visitor satisfaction

Satisfaction is the comparison that visitors make between the expectations they had before coming to Santander against all the experiences during the stay at each of the visited sites. The marks obtained should serve as a reference to find the most valued aspects and visualize areas for improvement.

To assess the level of visitor satisfaction, we took into account the following aspects: (See Graph 9)

- The accommodation service: evaluation of the elements considered most valuable such as condition of the infrastructure, furniture, toiletry items, staff treatment, room service and accommodation rates. In this aspect the visitors rating is 8.7 out of 10, highlighting the staff treatment with the best reviews.
- Food service: evaluation of the elements considered most valuable as quality of food, variety, staff treatment, hygiene and cleanliness and the price of the dishes. In this aspect the visitors rating is 8.3 out of 10, highlighting the staff treatment with the best reviews.
- Environmental factors: assessing the environmental aspects of the places visited such as cleaning and grooming of the municipalities and of the visited sites. Hospitality of the residents of the region. In this aspect the visitors rating is 8.6 out of 10, highlighting the hospitality of the residents as the highest rated.
- Leisure activities, recreation and free time: assessment of aspects related to the experience in cultural and sports activities and amusement parks. In this aspect the visitors rating is 9.1 out of 10, highlighting the experience in entertainment places as the highest rated.
- Infrastructure: assessing the aspects related to road conditions, local transportation and security. In this aspect the visitors rating is 8.4 out of 10, the state of the roads standing out as the weakest factor.

Graph 9. Assessment of visitor satisfaction
Travel group’s Tourism Expenditure

During the stay of a tour group in a destination, members buy products and services for consumption or purchase valuable objects to give away. The sum of all these values is the tourist expenditure.

Measuring tourist expenditure is a care task, if you want to determine the total expenditure made by each visitor on products and services purchased in the region. A first approach allows estimating that on average a visitor spends $ 295 during their stay in Santander, i.e. an average of USD82 daily. It’s important to highlight the variations in tourist expenditure. 50% of visitors spend on average less than USD73 per day, while the rest is above this value. (See Table 1)

Table 1 Tourism expenditure of visitors to Santander

<table>
<thead>
<tr>
<th></th>
<th>Percentile 25</th>
<th>Percentile 50</th>
<th>Percentile 75</th>
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<tbody>
<tr>
<td>Total expenditure per capita</td>
<td>USD157</td>
<td>USD263</td>
<td>368</td>
</tr>
<tr>
<td>Daily expenditure per capita</td>
<td>USD43</td>
<td>USD 73</td>
<td>USD102</td>
</tr>
</tbody>
</table>

Source: Situr Santander December 2012 – July 2013

If a first calculation estimates that in the period of December 2012 to July 2013, Santander has reached 260,000 visitors, one might conclude that the total revenue generated could be around USD77,000,000

Conclusions and implications
The Santander Tourist Information System - Situr will provide the region with a vital tool in order to make tourism a sustainable and competitive industry. The project “Profile, characterization and estimation of expenditure of the flows of visitors to Santander” is a pioneer in our region and is expected to be a reference to be implemented in other departments of Colombia.

The information that will be available will allow all the key actors in the tourism industry to have a better understanding of the movements of tourists coming to Santander, identifying opportunities to generate new business ideas, encouraging the flow of investment to improve tourism infrastructure and allowing the associated communities to see tourism as a feasible alternative to improve the quality of life in the context of a sustainable and competitive tourism.

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- Shareppy which provided the graphic design of the platform and the construction of the technological tool for the processing and analysis of the data.


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