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# **Journal of Business and SMEs**

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## **Presentation of Content**

In the first article we present, *Evaluation of the performance of financial management in SMEs of the manufacturing industrial sector in Ciudad Nezahualcóyotl, State of Mexico*, by OCAÑA-DE LA CRUZ, Eunice & MOLINA-MOREJON, Victor Manuel, with ascription in the Universidad Tecnológica de Nezahualcóyotl and Universidad Autónoma de Coahuila, as next article we present, *Proposal of an integral model for measuring productivity in a convenience store in Villahermosa, Tabasco*, by GARCÍA-JERÓNIMO, Beatriz, NOTARIO-PRIEGO, Roger, GARCÍA-REYES, David Antonio and NOTARIO-PRIEGO, Ezequiel, with ascription in the Instituto Tecnológico de Villahermosa, as next article we present *Agro-ecotourism and socio-cultural animation as an alternative for tourism development in the town of El Refugio in the municipality of Ruiz, Nayarit*, by ALTAMIRANO-ROLDÁN, Glafira Eugenia, QUESADA-RUIZ, Alejandra, GARCÍA- GONZÁLEZ, Frasin and MARTÍNEZ-FLORES, Eldy, with ascription in the Universidad Tecnológica de la Costa, as next article we present, *COVID-19 in the San Juan del Río, Qro. restaurant sector, effects and Outlook*, by PÉREZ-BRAVO, Julia, SALVADOR-LEDESMA, Martha and DÍAZ-NIETO, Elia Socorro.

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## Evaluation of the performance of financial management in SMEs of the manufacturing industrial sector in Ciudad Nezahualc6yotl, State of Mexico

### Evaluaci6n del desempe1o de la gesti6n financiera en las Pymes del sector industrial manufacturero en Ciudad Nezahualc6yotl, Estado de M6xico

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#### Abstract

Given the influence of SMEs in the creation of wealth and as a strategic sector for the development of the country, they must implement financial planning to develop their competitive advantage, visualizing business opportunities with adequate management and analysis of information, together with strategic objectives to know future scenarios, reduce exposure to financial risk contributing to efficient decision making. The objective of this research was to evaluate financial management in SMEs in the manufacturing industrial sector of Ciudad Nezahualc6yotl in the State of Mexico, to know the factors that contribute to their competitive advantage and generate a proposal for an adequate and accessible Financial Planning model, which allows them to visualize their internal potential contributing to their development and competitiveness, since their permanence and growth would improve the employment, poverty and competitiveness indices that the region needs. It is a mixed investigation that used the qualitative method in the exploration and non-experimental documentary and quantitative investigation stage, applying a questionnaire to collect information on 47 indicators of nine variables related to financial planning, of which 23 indicators are valued as unsatisfactory in its performance.

**Financial planning, Competitive advantage, Financial results**

#### Resumen

Dada la influencia de las Pymes en la creaci6n de la riqueza y como sector estrat6gico para el desarrollo del pa6s, deben implementar la planeaci6n financiera para desarrollar su ventaja competitiva, visualizando oportunidades de negocio con una adecuada gesti6n y an6lisis de la informaci6n, con objetivos estrat6gicos para conocer escenarios futuros, disminuir la exposici6n al riesgo financiero contribuyendo a la toma de decisiones eficiente. El objetivo de esta investigaci6n fue evaluar la gesti6n financiera en las Pymes del sector industrial manufacturero de Ciudad Nezahualc6yotl en el Estado de M6xico, para conocer los factores que contribuyen a su ventaja competitiva y generar una propuesta de modelo de Planeaci6n Financiera adecuado y accesible, que les permita visualizar su potencial interno contribuyendo a su desarrollo y competitividad, ya que su permanencia y crecimiento mejoraría los 6ndices de empleo, pobreza y competitividad que la regi6n necesita. Es una investigaci6n mixta que utiliz6 el m6todo cualitativo en la etapa de exploraci6n e investigaci6n documental y cuantitativa no experimental aplicando un cuestionario para recabar la informaci6n sobre 47 indicadores de nueve variables relacionadas a la planeaci6n financiera de los cuales 23 indicadores est6n valorados en poco satisfactorio en su desempe1o.

**Planeaci6n financiera, Ventaja competitiva, Resultados financieros**

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## Introduction

Small enterprises have been studied from various perspectives, given the influence they have on wealth creation, as a sector of strategic importance for the development of the country, and especially for the State of Mexico, since their permanence and growth would improve the employment, poverty and competitiveness indices that the region needs.

INEGI has pointed out that the average life span of a newly created company in Nezahualc6yotl Estado de M6xico is 6.2 years. The lack of financial planning in SMEs in Nezahualc6yotl puts them at a disadvantage compared to their competitors, they lose business opportunities due to inadequate management and analysis of financial information, the lack of strategic objectives leads to a lack of knowledge of possible scenarios and courses of action with a high exposure to financial risk both internally and externally, contributing to inefficient decision making.

This research aims to evaluate financial management in manufacturing industrial SMEs in Ciudad Nezahualc6yotl in the State of Mexico to understand the factors in financial management that contribute to their competitive advantage and financial performance.

The hypothesis proposed for this research is: the set of tools for financial planning and valuation will allow timely decision making of a strategic nature contributing to improve their competitive advantage and financial results of SMEs in the industrial manufacturing sector of Ciudad Nezahualc6yotl in the State of Mexico.

The objective of this research is to evaluate the financial management of SMEs in the industrial manufacturing sector of Ciudad Nezahualc6yotl in the State of Mexico, in order to know the factors in financial management that contribute to their competitive advantage and generate a proposal for an appropriate and accessible Financial Planning model, which allows them to visualise their internal financial potential contributing to their development and competitiveness, since their permanence and growth would improve the employment, poverty and competitiveness indices that the region needs.

## Theoretical framework

### *Definition of financial planning*

(Azarenkova et al., 2017) discusses methods and models of financial forecasting and proposes their unification. points out that financial planning is an important element of management, which ensures the achievement of strategic priorities, it is an essential tool for achieving the main objectives of the company profit maximisation and minimisation of company cost. (p.39)

(Gamage et al., 2020) "Defeating financial barriers, having sufficient capital, managing cash flows and the willingness to access global capital are identified as the prior suggestions to face global competition." (p.29)

Financial planning in this model has strategic and business philosophy bases, it defines the clear direction in the project management system based on the business philosophy as a competitive strategy (Gonz6lez Vilorio, 2011).

The model contemplates the use of financial planning tools such as budgets to obtain the most profitable use of resources. Providing an integrative system that helps the small entrepreneur to focus on medium-term financial objectives in order to obtain higher returns (Parra & Madriz, 2017).

Without losing sight of the requirement of using an adequate accounting system that few SMEs have managed to consolidate; in this regard the challenges of the accounting system revealed by (Ibrahim et al., 2020) in their research Accounting Information Systems in SMEs are more towards operational issues that are aligned with the business strategy, one of the main problems is related to data duplication, data inaccuracy, as well as the difficulty to access the data; it is time consuming and inefficient (p. 51). (Parra & Madriz, 2017)" One of the current needs of SMEs is to use management accounting methods, such as budgeting, aimed at planning and controlling profits, the success of any economic entity depends on the expertise to apply the stages of the management process and especially the planning and setting of revenue, expenditure and profit targets to be achieved competently with a systematic approach" (p.36).

Parra & Madriz, J. L. (2017). In his work "Budget as an instrument of financial control in small family businesses" he states that:

It is highlighted that they do not have a preliminary project where the dependence between total costs, income and profits is considered, also commercial activities are out of control which can lead to carelessness in transactions and poor results. SMEs lack project management where the flow of expenses and investment and the number of items to be produced are calculated (p.45).

(Saavedra-García et al., 2018) The main findings of their survey show that financial information systems are used in a rudimentary way, especially in microenterprises. It is also observed that there is an association between the manager's schooling and the professionalisation of the financial area. In the same way, it was found that financial management is reduced in this type of company, particularly with regard to the formulation of forecasts and financial analysis ratios. (Saavedra-García et al., 2018).

The SME manager as an ongoing business has developed valuable experimental knowledge that has allowed him to evolve from a reactive attitude in exercising command and decision-making in his administrative process to a proactive and innovative attitude that has allowed him to remain in a very competitive environment (Hernández Palma, 2011).

(Roa, María Del Pilar Báez & Martínez, 2018) if entrepreneurs do not have the knowledge to carry out adequate financial management, they hinder good performance and competitiveness.

(Azarenkova et al., 2017) The introduction of financial planning is a system that increases the efficiency of performance, allows to predict the financial results of the company, improve the efficiency and effectiveness of exploitation of resources, receive accurate information for decision-making, to improve the performance and competitiveness of the company (p.55).

The business environment becomes unpredictable day by day, the changes derived from endogenous causes such as non-existent planning, organisation without objectives, low levels of competence and management or extrinsic causes such as epidemics, market behaviour, governmental decisions, inflation, destabilise the competence of the companies, management and profitability become complicated (Quishpe, M. B. G., & Vaca, 2022).

INDEPENDENT VARIABLES	CONCEPTUAL DEFINITION
Value proposition	Understanding the market and customer relationships and constructive prototype-oriented analysis to develop the idea step by step (Gazca Herrera et al., 2020). Creates value for a market segment through a specific mix of elements (Osterwalder & Pigneur, 2011).
Vision	The components are: customer in the target market, marketing offerings and values provided to customers, the technology they use, concern for survival, growth, profit, (Esen & Oguz 2019) personality of the organisation highlighting its unique strategic approach. (Munelo & Atienzo, 2023)
Mission	Mission: to promote positive social and economic change through innovative business models (Osterwalder, A., & Pigneur, 2011). As part of its strategy, it has a positive impact on its customers, the satisfaction and professional development of its employees, the environment and the surrounding community, and current legislation (Huerta-Estévez & Andrade-Estrada, 2021).
Financial Information Management	"The organisation should determine the knowledge necessary for the operation of its processes and to achieve conformity of products or services; it should be maintained and made available as necessary. (ISO copyright office, 2015). Manage from its creation process, exchange, combination, application to clarify and enhance the organisational process, preserve and disseminate it (Villasana Arreguín et al., 2021).
Competitive strategy	In line with the strategic intent, customer-centric strategies have proven to be the most efficient in companies' efforts to adapt their value chains to customers' needs and expectations. (Guerola-Navarro et al., 2021).

	Cost leadership, differentiation, cost focus and differentiation focus. Porter (1980) Innovation, risk-taking and proactivity" (Lechner & Gudmundsson, 2014; Strategy is the determination of a firm's basic long-term goals and objectives, together with the adoption of courses of action and the allocation of resources necessary for the achievement of the objectives Chandler (2003)
Financial planning	Financial planning is a system that increases the efficiency of performance, allows predicting the financial results of the company, improving the efficiency and effectiveness of the exploitation of resources, receiving accurate information for decision-making, and improving the performance and competitiveness of the company (Azarenkova et al., 2017) Integrative system that helps the small entrepreneur to focus on medium-term financial goals for higher returns (Parra & Madriz, 2017)
Financial analysis	It represents a fundamental instrument in the work of the financial manager, it is the mechanism to evaluate the situation of liquidity, solvency, efficiency in operations, new sales strategies, collections, the need for financing and the yield generated; as well as to verify whether the financial objectives achieved are in accordance with what was planned. (Nava Rosillón, 2010) Percentage of unit participation of each source of financing in the total amount and the financial structure of a company considers the total financing of its assets, which refers to all liabilities and capital on the balance sheet of a company (Valencia, H, 2009).
Competitive advantage	Achieve leadership and stay there. Porter (2008) Establishing alliances with customers, based on parameters of quality and excellence; defining, implementing and executing the strategy should lead to the construction of a competitive advantage. Serna (2008) Customer relationship management as the solution with the greatest impact and relevance in the maintenance and enhancement of the advantage (Guerola-Navarro et al., 2021).

	The permanence of microenterprises from the strategic approach and from the tactical-operational approach has the following factors: the social dynamics of employees, consolidation, social cohesion for action, differentiation, organisational identity, formalisation for governance and efficiency in processes. (Becerra Bizarrón & Cortes Palacios, 2018).
Financial performance	They come from the performance of financial operations and refer to the levels of liquidity, profitability and risk that a company goes through in a given period. These results are a consequence of the management that has been carried out in the entity, so they are a good indicator of corporate performance; in addition, they allow the survival and development of organisations. (Acosta-Medina et al., 2019).

**Table 1** Conceptual definition of independent variables  
*Source: Own elaboration.*

## Methodology

It is a mixed qualitative study in the stage of exploration and documentary research and non-experimental quantitative, the temporality is transversal since the sampling occurs only once; it starts from a general hypothesis and seeks to refute it by discovering conclusions from the sample so it can be classified as hypothetical deductive (Ishtiaq, 2019).

The literature review was conducted and the conceptual model was designed using Atlas Ti. As a theoretical basis for the design of the instrument for the collection of information, its construction was based on the documentary research of the theoretical framework and the operationalisation matrix of the variables, taking into account the hypotheses raised and the objectives of the research, each question is related to the indicators of the variables; same that was reviewed and assessed by the professors of the doctorate and entrepreneurs, The proposed measurement scale was from zero to ten, being appropriate for the analysis the categories from highly satisfactory to not satisfactory, according to the data collected from the respondents yielded a result of 0.943 in the reliability coefficient of the instrument measuring all 47 items, which indicates that the internal consistency is very good.

For the calculation of the sample, the National Statistical Directory of Economic Units was reviewed, specifically in economic activities of manufacturing, in the food industry, manufacture of clothing, manufacture of metal articles, manufacture of furniture, mattresses and blinds, as well as other manufacturing industries, the size of establishment that was searched was from 6 to 50 employees, in the geographical area of Ciudad Nezahualcoyotl.

The search results yielded 217 economic establishments. Using Cochran's sample calculation (1963:75)

$$N=N/1+N(e)^2$$

Table 2. Sample size for ±5%, ±7% and ±10% Precision Levels Where Confidence Level is 95% and P=.5.

Size of Population	Sample Size (n) for Precision (e) of:		
	±5%	±7%	±10%
100	81	67	51
125	96	78	56
150	110	86	61
175	122	94	64
200	134	101	67
225	144	107	70
250	154	112	72
275	163	117	74
300	172	121	76
325	180	125	77
350	187	129	78
375	194	132	80
400	201	135	81
425	207	138	82
450	212	140	82

Figure 1 Calculation of the sample  
Source: (Naing, 2003)

We had the support of the staff of the office in the area of SME Economic Development of the Municipal Government of Ciudad Nezahualcoyotl to survey 111 companies, but the final sample consisted of 96 companies with valid questionnaires and 15 invalidated questionnaires with which the database was formed.

For the statistical analysis of the data, the IBM SPSS STATISTIC software was used to analyse the descriptive data of the sample.

**Results**

The variables and indicators associated with financial planning that resulted from the analysis of the selected texts, and the coding of significant elements for the development of the theoretical model are as follows.

Variables of Characterization			INDICATORS	
1	A	Value proposal	A1	Based on technological knowledge
2			A2	Based on market knowledge
3	B	Vision	B1	Focus to result
4			B2	future aspiration
5	C	Mision	C1	Values
6			C2	Purposes
7	D	Management	D1	Information Management Practices
8		Information	D2	Repository of lessons learned
9		financial	D3	Learning-oriented culture
10	E	Strategy	E1	Generation and development of new business opportunities
11		Competitive	E2	Customer information
12			E3	Productive chains
13			E4	Innovation in production process
14			E5	Product innovation
15			E6	Costs reduction
16			E7	Productive investment
17			E8	Product differentiation
18			E9	Customer service orientation
19			E10	Electronic commerce
20			E11	Defensive actions customer rewards
21			E12	Loyalty programs
22			E13	Pricing policy
23			E14	Supplies and logistics
24	F	Planning	F1	Relevant financial information
25		Financial	F2	Financial analysis
26			F3	Breakeven
27			F4	Forecasts and sales targets
28			F6	Costs and expenses
29			F7	Current investment
30			F8	Fixed investment
31			F9	Cash Flow
32			F10	Financing management
33	G	Valuation and	G1	Solvency
34		Analysis	G2	Working capital
35		Financial	G3	Operating leverage
36			G4	Activity
37			G5	Cost effectiveness
38			G6	Collateral guarantees
39			G7	Financial structure
40	H	Advantage	H1	Customer satisfaction
41		Competitive	H2	Company longevity
42			H3	Expansion
43	I	Results	I1	Increase in sales
44		Financial	I2	Increase in production
45			I3	Lower costs
46			I4	Increased profitability
47			I5	Effective decision making

Table 2 Variables associated with financial planning  
Source: Own elaboration

Diagram of the initial proposed model and the results of the qualitative analysis embodied in the construction of the semantic networks elaborated on the basis of careful reflection and above all reflecting the project guidelines, Atlas TI 7 was used as a tool for storing and analysing information from various reference materials.

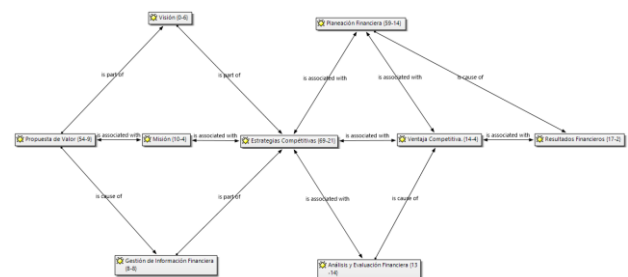


Figure 2 Semantic network of financial planning for the management and development of manufacturing industrial SMEs in Nezahualcoyotl State of Mexico  
Source: Own elaboration with Atlas Ti

Results obtained from the application of the questionnaire to the 96 industrial manufacturing SMEs in Ciudad Nezahualcóyotl that constituted the sample were as follows:

Data collected from the respondents show a result of 0.943 in the reliability coefficient of the instrument measuring all 47 items, which indicates that the internal consistency is very good.

In the total item statistics it is observed that it is not necessary to eliminate any of the coefficients because they do not present abrupt changes in the discrimination index and the scores in general oscillate between .940 and .944, all the items are good.

The calculated results of the measures of central tendency are presented in general for the 47 indicators evaluated, especially the arithmetic mean where results are interpreted both in individual rating values and in their appreciation by range of intervals.

Descriptive statistics 47 indicators	N	Min	Max	Media	Deviation	Variance
Based on technological know-how	96	0	10	7.99	2.566	6.579
Based on market knowledge	96	2	10	8.9	1.41	1.989
Focus on quality	96	0	10	8.65	1.723	2.968
Value orientation	96	0	10	8.53	1.783	3.178
Values	96	2	10	8.64	1.516	2.297
Purposes	96	0	10	8.06	2.071	4.291
Information management practices	96	2	10	8.83	1.494	2.232
Lessons learned repository	96	0	10	8.16	2.212	4.891
Learning-oriented culture	96	0	10	8.11	2.117	4.481
Generation and development of new business opportunities	96	0	10	8.23	1.768	3.126
Customer information	96	0	10	8.99	1.108	1.244
Production chains	96	0	10	7.77	2.673	7.147
Innovation in the production process	96	0	10	7.68	2.589	6.705
Product innovation	96	0	10	8.06	2.325	5.407
Cost reduction	96	0	10	8.08	2.379	5.193
Productive investment	96	0	10	7.51	2.902	8.421
Product differentiation	96	0	10	8.13	2.007	4.026
Customer service orientation	96	0	10	8.56	1.621	2.628
E-commerce	96	0	10	8.11	2.504	6.271
Delays across Customer research	96	0	10	8.28	2.414	5.823
Loyalty programs	96	0	10	8.43	1.989	3.957
Pricing policy	96	0	10	8.56	1.485	2.207
Procurement and logistics	96	0	10	8.14	1.969	3.880
Relevant financial information	96	0	10	8.51	1.698	2.884
Financial analysis	96	0	10	8.26	2.038	4.153
Break-even point	96	0	10	8.26	1.773	3.142
Sales forecasts and targets	96	0	10	8.31	1.71	2.921
Costs and expenses	96	0	10	8.24	2.094	4.016
Current investment	96	0	10	8.66	1.634	2.67
Fixed investment	96	1	10	8.5	1.654	2.737
Cash flow	96	0	10	8.1	2.042	4.171
Financial management	96	0	10	7.54	2.312	5.344
Solvency	96	0	10	7.72	3.104	9.636
Working capital	96	0	10	8.4	2.53	6.4
Operating leverage	96	0	10	7.77	2.685	7.21
Activity	96	0	10	8.46	1.818	3.304
Profitability	96	0	10	8.4	2.068	4.277
Collateral guarantees	96	0	10	7.83	2.951	8.709
Financial structure	96	0	10	8.28	2.611	6.813
Customer application	96	1	10	8.66	1.541	2.377
Logistics of the company	96	0	10	8.91	1.037	1.075
Expansion	96	0	10	8.25	2.157	4.653
Increase in sales	96	0	10	8.53	1.306	1.706
Increase in production	96	0	10	8.39	1.602	2.566
Increase in costs	96	0	10	8.19	2.399	5.754
Increase in debt	96	0	10	8.23	2.373	5.627
Effective decision making	96	2	10	8.78	1.275	1.625

Table 3 Descriptive statistics 47 elements of the model Source: Own elaboration with IBM SPSS Statistics.

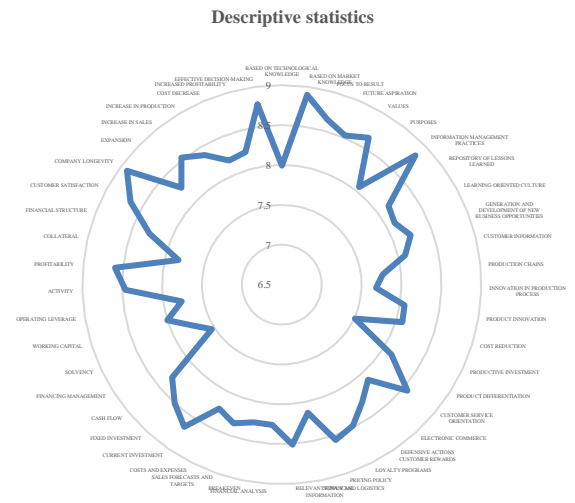


Figure 3 Radial average assessment of 47 indicator Source: Own elaboration

In the radial graph the average of the scores obtained in the 47 indicators evaluated is presented, highlighting those that were evaluated with the lowest average rating by the surveyed companies, among the lowest values is the reactive referred to Productive Investment "We expand and renew the investment in our fixed assets frequently" with an average rating of 7.51 points. 51 points; the Productive Process Innovation item "We constantly modernise our productive processes" with a rating of 7.68 points; the Productive Chains indicator "We have managed to successfully insert ourselves into productive chains" with an average rating of 7.77 points.

77 points on average, these items belong to the Competitive Strategy variable; also the Financing Management item "We have financing contracts with various financial institutions" with an average score of 7.54 points, this item belongs to the Financial Planning variable; the Operating Leverage indicator "Our level of fixed costs is higher than those of raw materials and labour" with a score of 7.7 points, this item belongs to the Financial Planning variable; the Operating Leverage indicator "Our level of fixed costs is higher than those of raw materials and labour" with a score of 7.7 points, this item belongs to the Financial valuation and analysis variable; the Technological Knowledge Base indicator with the item "The product or service we offer to the customer provides value in technology" valued at 7.99 points, this item belongs to the Value Proposition variable.

In the case of the indicator Collateral Guarantees "Our fixed assets are recorded as collateral for loans with financial institutions" belonging to the variable Financial Evaluation, it is a statement in the opposite direction, so that the companies surveyed have valued this indicator low with 7.83 rating points, which indicates that the assets owned by the SME are not recorded as collateral or only some of them, so that in this indicator the low valuation would be considered satisfactory.

On the other hand, indicators evaluated with a very satisfactory rating stand out, such as the indicators Longevity of the company with the reactive "We provide our clients with experience, reliability and quality assurance" which obtained 8.91 points, this indicator being the best evaluated on average, belonging to the variable Competitive Advantage; the indicator "Effective decision making" with the reactive "Decision making in the company always leads us to obtain the maximum benefits" with an evaluation of 8.78 points on average, belonging to the variable Competitive Advantage; the indicator "Effective decision making" with the reactive "Decision making in the company always leads us to obtain the maximum benefits" with an evaluation of 8.78 points on average, belonging to the Financial Results Variable; and the indicator based on Market Knowledge with the reagent "The product or service we offer meets the needs of customers" with a rating of 8.9 points on average, which belongs to the Value Proposition variable and the indicator Information Management Practices with the reagent "We collect and keep complete information in physical or electronic files of the company's operations" with an average evaluation of 8.83 points, which belongs to the Knowledge Management variable.

### **Conclusions or discussion**

The average of the sample data of the 47 indicators that were evaluated by the entrepreneurs indicates that 8 indicators were evaluated with an average rating of 7.51 to 7.99 points, which indicates a perception in the management of these processes with a performance ranging from poor to unsatisfactory on average, representing this group 17% of the total of the indicators evaluated.

24 out of 47 indicators were evaluated with average scores of 8.0 to 8.48 points, indicating a perception of management performance ranging from fair to satisfactory on average, representing 51% of the total number of indicators evaluated.

15 out of 47 indicators were evaluated with average scores of 8.5 to 8.91 points, indicating a perception of management performance ranging from good to very satisfactory, representing 32% of the total number of indicators.

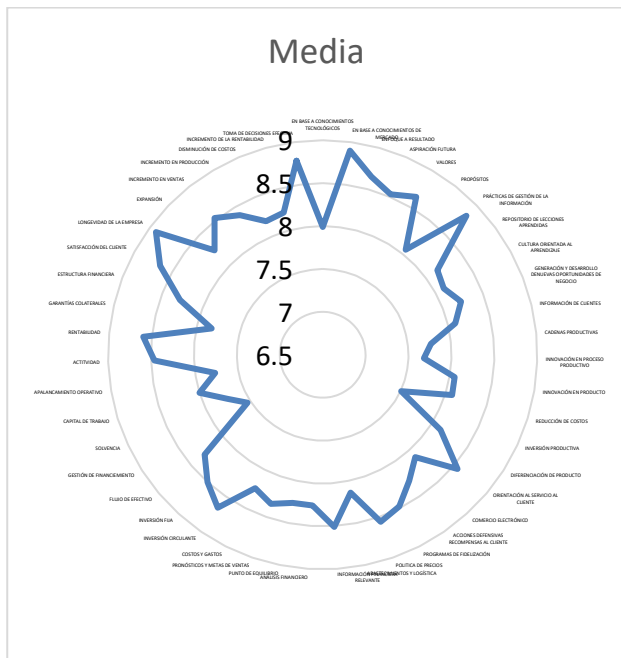
No indicator was evaluated with an average higher than 8.91, thus finding that no company in the sample rated the management of its processes from very good to highly satisfactory on average.

The actions proposed to improve the indicators evaluated as unsatisfactory are training in new technologies that allow the company to offer products with a higher degree of technological knowledge, how to generate meetings and workshops with staff to analyse strategies and operations to ensure success in future operations and consolidate itself as a learning company, investment and innovation projects and product differentiation, to offer differentiated attributes with respect to the competition.

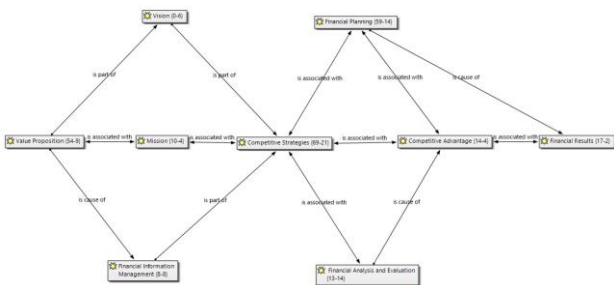
Training in calculating cash requirements, use of cash flow.

Solvency, sources of financing, disbursement management, temporary investments.

Annexes



**Annex 1.** Average radial graph of ratings of the 47 indicators associated with financial planning.



**Annex 2.** Semantic network of financial planning for the management and development of manufacturing industrial SMEs in Nezahualcoyotl, State of Mexico.

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## Proposal of an integral model for measuring productivity in a convenience store in Villahermosa, Tabasco

## Propuesta de un modelo integral para la medición de la productividad en una tienda de conveniencia en Villahermosa, Tabasco

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### Abstract

Nowadays, any company needs to be productive and competitive in order to function well, which signifies that productivity means doing the job in the best way, optimising the resources available to achieve the goals set within the company, and in turn is based on tangible and intangible factors. This project was based on measuring productivity in a grocery store in Villahermosa, Tabasco. For this purpose, a tool was developed to measure 8 basic criteria for creating and maintaining productivity, to be applied to each department of the store. We then developed a productivity improvement model to address these opportunities.

### Resumen

Actualmente, toda empresa u organización para su buen funcionamiento debe ser productiva y competitiva, deduciendo así, que la productividad es hacer el trabajo de la mejor manera posible optimizando los recursos disponibles para lograr nuestras metas establecidas dentro de la organización u empresa y a su vez, se basa en factores tangibles e intangibles. El presente proyecto, se basó en medir la productividad de una tienda de conveniencia en la ciudad de Villahermosa, Tabasco. Para ello, se diseñó un instrumento de medición de 8 criterios fundamentales para la creación y permanencia de la productividad, siendo aplicado a cada departamento de la sucursal. Posteriormente, se creó un modelo de mejoramiento de la productividad para la empresa y así mejorar las áreas de oportunidad.

### Productivity, Competitiveness, Instrument

### Productividad, Competitividad, Instrumento

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## Introduction

In current contexts, the study of productivity and competitiveness in organisations is a transcendental topic for their existence, being precisely the field of study of this research work.

Every company or organisation must be productive and competitive in order to function well, thus deducing that productivity means doing the work in the best possible way, optimising the available resources to achieve the goals established within the organisation or company and, in turn, it is based on tangible and intangible factors.

A company or organisation that does not have productivity is a company that does not generate quality, therefore, it will not meet all the attributes that the customer requires, in addition to innovating in the creation of products, services and processes, to generate a significant change and achieve commercial efficiency.

Similarly, competitiveness is a consequence of productivity, since, by being effective and efficient, consumer expectations will be met and will allow a company or organisation to maintain itself and achieve its objectives. Competitiveness depends on the continuous improvement of productivity over the long term.

To be a competitive company in the market, it is necessary to be willing to change, as it is known that the current globalised market will always be in constant change.

This project was based on measuring the productivity of a convenience store in the city of Villahermosa, Tabasco. To do this, a measurement instrument was designed with 8 fundamental criteria for the creation and permanence of productivity, being applied to each department of the branch.

Subsequently, a productivity improvement model was created for the company to improve the areas of opportunity.

## Methodology

This section shows a comprehensive productivity measurement instrument that was used to obtain information regarding the progress achieved in the total convenience store scheme. For the relevance of the study, it was decided to divide the application of the instrument by departments, which were:

- Human resources
- Commercial area
- Operations management

It is expected to obtain real and unbiased results, considering the elements that generate productivity and focusing on the participation of human capital in order to improve in the necessary areas and achieve integral growth.

The instrument shown in tables 1-8, consists of 8 fundamental criteria for productivity which are described below:

- **CRITERION 1: CUSTOMER SATISFACTION.** This module examines the effectiveness of the systems in meeting, anticipating and exceeding the full requirements and needs of customers before, during and after service delivery, and how it builds and strengthens a comprehensive and positive relationship with its customers.
- **CRITERION 2: LEADERSHIP.** This module examines the role and direct involvement of top management as the main "leader" of the continuous improvement process towards Total Quality. It also looks at their vision and commitment in the way they design, inspire, implement and evaluate the culture, through staff involvement and long-term performance and projection.

- **CRITERION 3: PEOPLE DEVELOPMENT AND INTELLECTUAL CAPITAL MANAGEMENT.** This module examines the systems and practices the institution has in place to identify, stimulate and optimise staff potential; how it designs its jobs, work systems, compensation and recognition schemes; training systems, skills and attitude development; and the promotion of staff health, well-being, satisfaction and motivation, as well as Intellectual Capital Management.

- **CRITERION 4: INFORMATION AND TECHNOLOGY MANAGEMENT.** This module examines how data and information are designed, selected and managed, how their analysis and reliability are performed, and technology management.

- **CRITERION 5: STRATEGIC PLANNING.** This module examines the planning process and how you develop your strategies and define your strategic objectives to improve your overall performance and competitive position. It also looks at how it establishes and deploys, from strategic planning, its objectives and plans.

- **CRITERION 6: PROCESS MANAGEMENT AND IMPROVEMENT.** The fundamental elements of the Quality, Environmental Protection and Industrial Safety Management System are examined; the design, planning, control, improvement and standardisation of key and support processes and the way in which the institution evaluates and continuously improves them.

- **CRITERION 7: IMPACT ON SOCIETY.** This module examines how the organisation makes continuous improvement efforts in its physical, social or economic environment so that other institutions in its community develop their own Total Quality programmes.

- **CRITERION 8: RESULTS.** This module analyses the interrelationships between the institution's key indicators and the value created by the quality maturity of its processes and systems, staff and suppliers in the internal value chain and for its patients, sectors of influence and society in its social value chain.

The measurement instrument is shown below, focusing on the 8 criteria to be evaluated, which will be filled in by the researcher, indicating the percentage of progress made in each criterion. It is important to clarify that the percentage of progress is established through interviews with experts in each area and depending on the evidence shown in each criterion.

CRITERION 1: CUSTOMER SATISFACTION		Progress in %				
		20	40	60	80	100
SUBCRITERIA						
1	Do you have a method for obtaining up-to-date information and understanding the requirements and needs of your clients?					
2	Do you have programmes to empower staff in contact with customers?					
3	Do you have mechanisms for receiving and resolving customer non-conformities quickly and effectively?					
4	Do you have a system for determining customer satisfaction levels?					
5	Do you have indicators of the effectiveness and efficiency of your system in relation to customers?					
6	Do you have a benchmarking process to compare your system practices with other organisations?					
7	Do you have customer satisfaction system improvement cycles?					

**Table 1** Comprehensive instrument for measuring productivity (Criterion 1)  
Source: Own elaboration

CRITERION 2: LEADERSHIP		Progress in %				
		20	40	60	80	100
SUBCRITERIA						
1	Does it have a method for implementing the Quality System?					
2	Does it have mechanisms for top management involvement in the activities of the Quality process?					
3	Does it have quality principles and values in place, defined, updated, oriented and aligned?					
4	Does it assess the organisational culture and identify and address identified gaps in the desired culture?					
5	Does it have records of leadership performance results?					
6	Does it have mechanisms to encourage union participation in the Quality process?					
7	Do you have indicators of effectiveness and efficiency of your leadership practices?					
8	Do you have a benchmarking process to compare your leadership practices with other organisations?					

**Table 2** Comprehensive productivity measurement tool (Criterion 2)  
Source: Own elaboration

CRITERION 3: STAFF DEVELOPMENT AND INTELLECTUAL CAPITAL MANAGEMENT		Progress in %				
SUBCRITERIA		20	40	60	80	100
1	Does it have a method for implementing the Quality System?					
2	Does it have mechanisms for top management involvement in the activities of the Quality process?					
3	Does it have quality principles and values in place, defined, updated, oriented and aligned?					
4	Does it assess the organisational culture and identify and address identified gaps in the desired culture?					
5	Does it have records of leadership performance results?					
6	Does it have mechanisms to encourage union participation in the Quality process?					
7	Do you have indicators of effectiveness and efficiency of your leadership practices?					
8	Do you have a benchmarking process to compare your leadership practices with other organisations?					

**Table 3** Comprehensive productivity measurement tool (Criterion 3)

Source: Own elaboration

CRITERION 4: INFORMATION AND TECHNOLOGY MANAGEMENT		Progress in %				
SUBCRITERIA		20	40	60	80	100
1	Do you have databases to plan, manage and evaluate your processes?					
2	Do you ensure the reliability, consistency, timeliness and updating of data and information?					
3	Do you consistently manage and analyse information and data including customer feedback?					
4	Do you have a method for managing technology?					
5	Do you have indicators of effectiveness to manage and improve your information and analysis and technology management systems?					
6	Do you have a benchmarking process to compare your information, analysis and technology systems with other organisations?					

**Table 4** Comprehensive instrument for measuring productivity (Criterion 4)

Source: Own elaboration

CRITERION 5: STRATEGIC PLANNING		Progress in %				
SUBCRITERIA		20	40	60	80	100
1	Do you have a method for developing your strategic planning?					
2	Do you determine strengths, weaknesses, threats and areas of opportunity?					
3	Do you have mechanisms to ensure that the Mission and Vision are in place and shared by staff?					
4	Do you have identified the main strategic performance indicators of your institution?					
5	Do you have a methodology to deploy Strategic Planning in the operation?					
6	Do you have a methodology to carry out the referential process of Quality practices?					
7	Do you use efficiency and effectiveness indicators to improve your Strategic Planning System?					
8	Do you have improvement cycles for your Strategic Planning System?					

**Table 5** Comprehensive productivity measurement tool (Criterion 5)

Source: Own elaboration

CRITERION 6: PROCESS MANAGEMENT AND IMPROVEMENT.		Progress in %				
SUBCRITERIA		20	40	60	80	100
1	Do you have a method for the analysis, development and improvement activities of your services?					
2	Do you have a Quality Management, Environmental Protection and Safety System?					
3	Are your Quality Management and Environmental Protection systems certified by a third party?					
4	Do you systematically apply the National Occupational Health and Safety Standard?					
5	Do you have methods for process improvement?					
6	Do you have effectiveness and efficiency indicators to improve your Quality, Environmental Protection and Safety Management Systems?					
7	Do you have a methodology for benchmarking your systems with other institutions?					
8	Do you have improvement cycles for your systems?					

**Table 6** Comprehensive productivity measurement tool (Criterion 6)

Source: Own elaboration

CRITERION 7: IMPACT ON SOCIETY		Progress in %				
SUBCRITERIA		20	40	60	80	100
1	Does it have mechanisms to stimulate and facilitate the development of other companies and institutions in its area of influence in the Total Quality process?					
2	Does it use indicators of effectiveness and efficiency to manage and improve its system for promoting the culture of quality?					
3	Do you have a methodology for benchmarking your quality culture promotion system with other organisations?					
4	Do you have improvement cycles for the promotion of quality culture?					

**Table 7** Comprehensive productivity measurement tool (Criterion 7)

Source: Own elaboration

CRITERION 8: RESULTS		Progress in %				
SUBCRITERIA		20	40	60	80	100
1	Do you have outcome indicators for your key and support processes?					
2	Do you have outcome indicators for profitability, performance, productivity and target achievement?					
3	Do you have outcome indicators that show the impact on growth, profitability, productivity, achievement of objectives and targets; derived from the systems of: Customer Satisfaction, Leadership, Staff Development and Intellectual Capital Management, Information and Technology Management					
4	Information and Technology Management, Strategic Planning, Process Management and Improvement, and Impact on Society.					
5	Do you analyse your comparative position with other institutions?					
6	Do you have properly documented favourable and unfavourable levels and trends over the last year? If so, please attach graphs for points 1, 2, 3 and 4.					

**Table 8** Comprehensive productivity measurement tool (Criterion 8)

Source: Own elaboration

**Results**

After the application of the instrument in each department, the data were processed and the following results were obtained:

HUMAN RESOURCES	Percentage
Customer satisfaction	93%
Leadership	91%
Personnel development and intellectual capital management	89%
Information technology management	78%
Strategic planning	90%
Management and process improvement	93%
Impact on society	83%
Results	80%
	87%

**Table 9** Results in percentage of the Human Resources area

Source: Own elaboration

With respect to table 9, in the area of human resources, there is a deficiency with respect to criterion 4 (information and technology management), where 78% of the answers to questions 5 and 6 indicate that there is no knowledge of the effectiveness indicators for managing and improving the information and analysis systems. However, it is worth noting that criterion 6 (management and improvement of processes) has 95%, which indicates that they have methods, analysis, development and improvement in their services, they have a quality management system, environmental protection and safety, safety standards and they have cycles of improvement in their systems.

COMMERCIAL AREA	Percentage
Customer satisfaction	84%
Leadership	91%
Personnel development and intellectual capital management	86%
Information technology management	87%
Strategic Planning	89%
Management and process improvement	89%
Impact on society	93%
Results	90%
	89%

**Table 10** Results in percentage of the Commercial area

Source: Own elaboration

In the commercial area, criterion 1 (customer satisfaction) has 84%, which is the lowest percentage in the graph, which is why it indicates non-conformity, as the answers obtained in questions 3, 4, 5 and 6 did not show knowledge about the mechanisms for receiving and resolving customer non-conformities quickly and effectively, nor about levels of satisfaction, indicators of effectiveness and efficiency, nor a reference process for comparison with other organisations.

It is important to highlight that in criteria 2 and 7 (leadership and impact on society) they show that they know and apply a good method of quality systems, as well as the participation of top management in the activities of the same, the principles and values of quality are in force and defined, and highlight that they have indicators of effectiveness in their leadership practices, as well as a referential process to compare their practices with other organisations.

OPERATIONS MANAGEMENT	Percentage
Customer satisfaction	91%
Leadership	94%
Personnel development and intellectual capital management	84%
Information technology management	87%
Strategic planning	90%
Management and process improvement	95%
Impact on society	90%
Results	88%
	90%

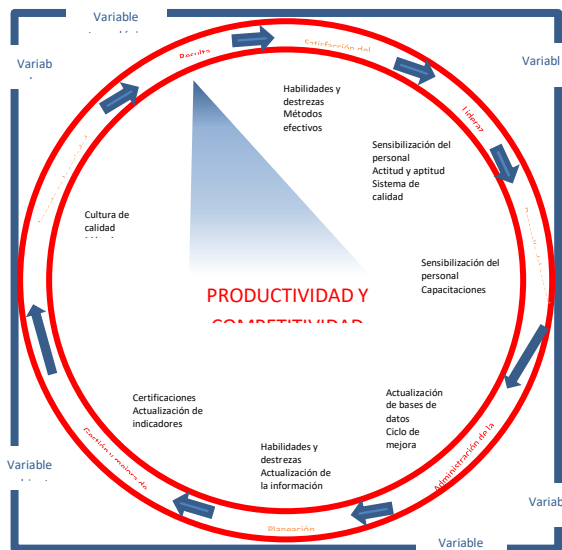
**Table 11** results in percentage of the Operations Management area

Source: Own elaboration

As can be seen in table 11, which belongs to the area of operations management, we observe that in criterion 7 (impact on society), which corresponds to 80% and is the lowest of the criteria evaluated in this area, it is mainly due to the fact that the way in which the organisation makes continuous improvement efforts in its social, physical and economic environment to help other organisations develop their own quality programmes is neutral, they have improvement cycles for the promotion of quality culture without updating, which means that their environment does not develop in an efficient manner. However, in criterion 6 (management and improvement of processes), with 95%, the fundamental elements of the Quality Management, Environmental Protection and Industrial Safety System stand out, where they have efficient methods for analysis, development and improvement of services, as well as certifications of their Quality Management and Environmental Protection System, indicators of effectiveness and efficiency for the improvement of this system and improvement cycles.

### Improvement proposal

The following is a graphic representation logically ordered according to the results obtained from the application of the integral productivity measurement instrument to the respective areas of the organisation, with this information it was possible to determine the structure of the productivity model:



When analysing the results obtained from the self-diagnostic instrument through the integral productivity measurement model, it was possible to identify some deficiencies in the convenience store and according to the organisation's personnel, it refers to the management of information and technology where there are some opportunities for improvement such as updating information in the databases to plan, manage and evaluate processes, consistent analysis of information and data, including customer feedback. This analysis can provide the organisation with opportunities for improvement.

Having knowledge about the current situation of the organisation, we started with the sensitisation of the staff to motivate and work in synergy, as it is difficult for staff without sensitisation to undergo training.

Proposing to the organisation to develop skills and abilities is of great benefit, as if this aspect is exploited in an adequate way, an active participation can be achieved when making a significant change within the company, in addition the personnel can develop the aptitudes and capacities for a good leadership.

A database update is proposed to the organisation for optimal information management, updating information in the databases, efficient improvement cycles, measurement indicators, for a noticeable improvement in the areas of the company.

Around this, there are also the six variables of the context that must be taken into account, as well as the projection that they have, since they have a direct or indirect impact on the organisation.

### Conclusions

In the present project a productivity improvement model was proposed for a convenience store in Villahermosa, Tabasco, this model will help the company to improve the areas that were low in productivity of the areas analysed through the measurement instrument based on 8 criteria, with which we were able to measure 3 areas (Human Resources, Commercial Area and General Management).

The model is adaptive and flexible to the variables of the context and with important elements to be useful in the context that is used, in this way, the study guides the company towards productivity and in the same way, aims to boost competitiveness to achieve a successful position in the current market.

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## Agro-ecotourism and socio-cultural animation as an alternative for tourism development in the town of El Refugio in the municipality of Ruiz, Nayarit

### El agro ecoturismo y la animación sociocultural como alternativa de desarrollo turístico en la localidad del Refugio en el municipio de Ruiz, Nayarit

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#### Abstract

The main objective of this work is to propose a product made up of agro ecotourism and sociocultural tourism animation in the town of El Refugio, in the municipality of Ruiz, Nayarit, to contribute to tourism development. This work is based on the results previously obtained from the tourism diagnosis of the municipality of Ruiz, Nayarit and its Tourism Characterization carried out by Altamirano et al. (2019), in which a documentary, field and descriptive research was developed, where tools were used for the characterization, compilation, classification and ranking of the natural resources of the municipality of Ruiz Nayarit, as well as the determination of the tourist inventory, the degree of knowledge about tourism, its potential, the acceptance of tourism and the tourism product of the town of El Refugio, through the tourist inventory survey form and finally it was known through interviews with the residents of the town. locality, the degree of knowledge about tourism, its potential, acceptance of tourism and the tourism product. Once all the evidence was documented, the design of the agroecotourism product proposal was carried out as a viable and valuable option for tourists who visit the town and who are interested in knowing the agricultural process of coffee and pineapple, as well as that of carrying out activities in contact with nature and social integration, applying the techniques of sociocultural tourist animation to contribute to the tourist development of the community.

Agroecoturismo, Tourist diagnosis, Characterization

#### Resumen

El objetivo principal de este trabajo es proponer un producto conformado por el agro ecoturismo y la animación turística sociocultural en la localidad de El Refugio, en el municipio de Ruiz, Nayarit, para contribuir al desarrollo turístico. El presente trabajo parte de los resultados previamente obtenidos del diagnóstico turístico del municipio de Ruiz, Nayarit y su Caracterización turística realizada por Altamirano et al. (2019), en la que se desarrolló una investigación documental, de campo y de tipo descriptiva, donde se utilizaron herramientas para la caracterización, compilación, clasificación y jerarquización de los recursos naturales del municipio de Ruiz Nayarit, así como la determinación del inventario turístico, el grado de conocimiento sobre turismo, su potencial, la aceptación sobre realizar turismo y el producto turístico de la localidad de El Refugio, por medio de la ficha de levantamiento de inventario turístico y finalmente se conoció a través de entrevistas a los pobladores de la localidad, el grado de conocimiento sobre turismo, su potencial, la aceptación sobre realizar turismo y el producto turístico. Una vez documentada toda la evidencia, se procedió a realizar el diseño de la propuesta del producto agro ecoturístico como una viable y valiosa opción para los turistas que visiten la localidad y que estén interesados en el conocimiento del proceso agrícola del café y la piña, así como el de realizar actividades en contacto con la naturaleza y de integración social, aplicando las técnicas de la animación turística sociocultural para contribuir al desarrollo turístico de la comunidad.

Agro ecoturismo, Diagnóstico turístico, Caracterización

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## Introduction

The history of the development of tourism in the world shows its increasing diversification and extension to different sectors of society, which contributed to it acquiring a massive character and consequently responding to all the preferences of different groups.

The need for differentiated treatment, the need for contact with new cultures and their representatives, their higher level of activity, among other things, all influence the current trends in the practice of tourism.

Today, one of the most important challenges of the 21st century for Latin America is to achieve the development of rural areas.

Of the rural environment and, within the main strategic actions aimed at promoting its sustainable development, elements such as seeking the multifunctionality of agriculture, the valorisation of the natural environment and biological resources stand out (IICA, 2010).

Romero (2015) states that agrotourism are experiences that take place during a trip in a rural environment with an agricultural vocation. While ecotourism encompasses a set of tourism activities also practised within a rural territory, but where the human impact is minimal, i.e. in a place where a space where nature is still preserved in its natural state, both in terms of biotic and abiotic factors.

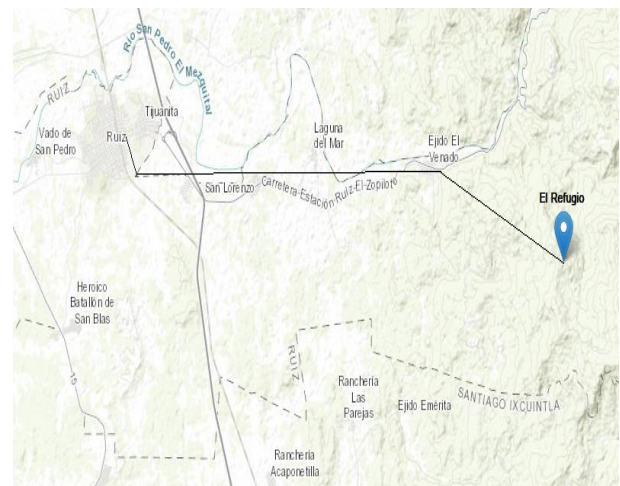
### Abiotic factors

According to Pumares (2019), agritourism is an activity that allows for increased social contact (94.4%), the realisation of personal goals (77.8%) and prevents family members from working outside the farm (36.1%). This is the opinion expressed by the respondents respectively as the most important additional advantages of diversification into tourism.

In addition to the above, it is necessary to highlight the importance of generating an interaction that promotes a close approach between the user or tourist and the place, provoking a discovery of the environment, integrating socio-cultural tourism animation through its techniques linked to cultural entertainment and traditional activities, since according to Jakovlev et al. (2016) this variety of recreational, cultural and entertainment activities motivates participation.

According to Kalcheva (2016) socio-cultural tourism animation is a methodology of social intervention in order to promote popular culture and generate experiences by creating conditions for the active participation of the consumer or subject. Within the activities of socio-cultural tourism animation Isidor et al. (2017) point out that we can find activities of socio-cultural interaction and communicative aspects that contribute to economic and community development.

### Location of the locality



**Figure 1** Location map of El Refugio locality

Source: Own elaboration with information taken from google maps.

The locality of Refugio is 21.5 kilometres from the municipality of Ruíz and is located at an altitude of 699 metres above sea level. There are 189 inhabitants in the community.

Ruiz is a municipality in the state of Nayarit, which has a wide range of diversified tourist resources that mainly include natural resources such as natural water streams, traditional festivities and customs whose characteristics depend on the place where they take place. Likewise, on the agrarian sector, according to the Food and Livestock Information System (SIAP) of the Ministry of Agriculture, Livestock, Rural Development, Fisheries and Food (SAGARPA), 33 types of crops are produced in the municipality, of which grass, coffee, cherry, pineapple, sorghum, grain and rice palay stand out as more or less stable crops in the municipality (Torres et al. 2013).

El Refugio, located in the highlands of Ruíz, is a locality dedicated mostly to agricultural activity, mainly consisting of coffee, pineapple and jihuete crops, surrounded by natural resources that can be used for economic and tourism development. Based on the research work carried out by Altamirano et al. (2019) regarding the tourism characterisation of the Municipality of Ruiz, Nayarit, which shows the potential of the territory in its rural area and the great variety of products that can be offered with the implementation of new strategies such as agrotourism, seeking a sustainable balance between nature and the agro-systems that contemplate the social, economic and cultural development of rural communities, looking for a sustainable balance between nature with the agro-systems that contemplate the social, economic and cultural development of rural communities, economic and cultural development of rural communities, mainly seeking to provide services, products and entertainment both in places little altered by man, and in places where man has already disturbed the natural environment to practice either agriculture, livestock, fish farming, forestry or all at once (Romero, 2015), and linking it with socio-cultural tourism animation.

It was also found that resources and attractions in the locality are underutilised due to the lack of tourism culture in the community, the lack of tourism infrastructure, the lack of tourism promotion, the lack of coordination between public and private actors, as well as the low level of productivity and competitiveness.

For the aforementioned reasons, it was decided to create a tourism product based on agro-ecotourism, linking socio-cultural tourism animation as an alternative for development in the municipality that allows for the generation of new experiences, the exploitation of the productive chains dedicated to agricultural activity, as well as the attractions and natural resources to contribute to the social, economic and cultural development of the locality.

This tourism product is a novel proposal that seeks to offer a new way of tourism, to value, enjoy and admire the natural wealth of the locality of El Refugio, but at the same time to interact with the inhabitants of the host communities through socio-cultural tourism animation, generate economic revenue, create sources of employment, expand and diversify the tourist offer, provide the tourist with a differentiated service and treatment, but above all contribute to the sustainable development of the region.

Nowadays, rural tourism has become an initiative for the development of communities with the aim of improving their living conditions, generating additional economic income for the population, who organise themselves collectively by implementing initiatives that meet the needs of tourists seeking tourism in rural areas, as in the case of El Refugio.

For years, agrotourism has been seen as a recreational activity within the modalities of tourism in rural areas, where one or more of the phases related to agricultural production can be articulated, in addition to agro-industry, handicrafts or gastronomy.

Rural tourism as a tourist activity is a strategy for the development of rural communities as it aims to help curb problems such as poverty and migration, strengthening the organisational structures involved in local decision-making, involving the entire local population, revaluing cultural expressions and environmental conservation. Although tourism alone does not solve all these problems, it does represent an important support within the solution of these problems through the implementation of adequate management strategies, premises that will be addressed during the development of this research.

## Theoretical framework

### *The tourism system and its elements*

The tourism system is a conceptual model of a process formed by a set of elements ordered according to their functions and their spatial location, which are rationally linked to each other by means of the principles or rules of the market (supply, demand and regulation), while maintaining exchange relations with other systems of a different rank. Like any conceptual system, it comes from a real system and is parallel adjusted methodologically and symbolically, facilitating the analysis and understanding of that real system and it is in this sense that its importance as a research tool lies.

#### Composition:

It is appropriate to analyse tourism from an overview, as a system in which its parts can be defined and links between them can be specified. The tourism system is composed of a set of heterogeneous elements that are closely linked to each other and in constant dynamism. According to Molina's model (2006), the tourism system is composed of 6 elements that pursue a common goal:



**Figure 2** Molina's tourism system  
Source: Molina (2006)

### *Tourist attractions*

These are places that arouse the tourist's interest in visiting a destination thanks to their outstanding tangible and/or intangible characteristics. To be considered attractive, a destination must be competitive and to achieve this, it must satisfy the motivations that drove visitors to travel to it.

The tourist attractions of a destination are divided into natural attractions such as parks, deserts, beaches, etc., and cultural attractions such as gastronomy, folklore and the architecture of its monuments and historical sites.

### *Superstructure*

These are public and private organisations that represent service providers in sectors related to tourism, in the same way that they establish policies, look after the interests of their members, develop projects and promote investment.

In Mexico there are, for example: the Ministry of Tourism (SECTUR), the Ministry of Economy, the National Chamber of Restaurants and Seasoned Food Industry (CANIRAC), the Ministry of Environment and Natural Resources (SEMARNAT), the National Fund for Tourism Development (FONATUR), etc.

### *Infrastructure*

Defined by the dictionary of the Royal Spanish Academy as the set of elements, endowments or services necessary for the proper functioning of a country, a city or any organisation.

In the case of the tourism sector, they are the communication routes that are indispensable for the traveller to be able to move in and out of the tourist destination. There are 3 types of infrastructure: (1) Maritime, (2) Land and (3) Air.

### *Services (supply)*

In the tourism system we find 2 types of services, the basic ones such as hotels, travel agencies and restaurants, i.e. they are those properties that a tourist needs in a fundamental way when travelling; and the complementary services, which do not intervene directly with the tourist, but are necessary, examples of these are banks, exchange offices or petrol stations.

### *Demand (tourists)*

None of the above elements could exist without tourists. They are the counterpart of the law of supply and demand, i.e. they are the ones who consume, use and/or benefit from what the destination has to offer; moreover, it is from their experience that strategies can be established within the destination to satisfy their needs in a better way, encouraging the development of the host community.

### *The host community*

These are the local residents who directly (such as tourism service providers) or indirectly (general population or human resources of various companies) have contact with the tourism community.

For its part, the World Tourism Organisation (WTO, 1991) focuses the tourism system on four elements: demand, supply, geographical space and market operators.

Boullón (2006) proposes the following elements: demand, supply, infrastructure, superstructure, attractions and facilities.

**Demand:** this is the most dynamic component of the system and involves the group of people (actual or potential) who travel and make use of the services and facilities created for their recreation. From a socio-economic point of view, demand is determined by ease of access to transport, income, educational level and the desire to get away from routine; tourism demand is generated when society has generally exceeded a level of income sufficient to cover basic needs.

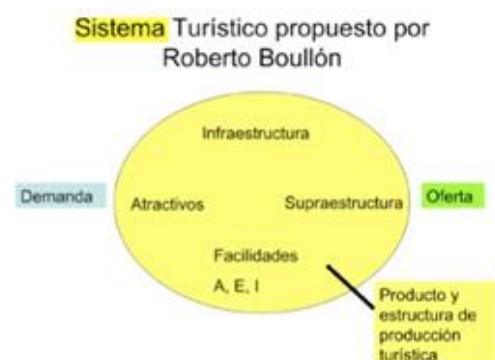
**Supply:** this is the set of elements that make up the tourist experience, i.e. it is made up of those elements that attract tourists to the destination and manage to satisfy their needs and expectations. Thus, the following components can be distinguished: tourist resources and attractions, the tourist plant (companies related to the sector), infrastructures and institutional elements (public and private institutions involved in tourism development).

Tourist resources and attractions are those elements that motivate tourists to travel. They can be of natural, cultural, etc. origin. A distinction can be made between resources and attractions, the former being potential attractions, while the latter are those resources that have already been put to good use.

**Tourist facilities:** these are all the companies that facilitate the tourist's stay at the destination by providing accommodation, catering, leisure, travel, etc. services.

**Infrastructure:** all those elements that provide services that are not exclusively tourist services and that primarily seek the satisfaction of the local population, but which and which primarily seek the satisfaction of the local population, but without which it would not be possible for tourism services to function. These are roads, railways, ports, airports, communications, energy networks, drinking water and wastewater networks, waste collection systems, etc. Some authors make a distinction between infrastructure and support infrastructure, referring to the former as static elements and the latter as those that are transformed according to needs (e.g. infrastructure: an air route, a sea route; support infrastructure: an airport or a seaport).

**Institutional elements:** these are tourism legislation in general, public, private or mixed tourism bodies, promotional actions, facilitation of private companies, i.e. all activities carried out by the public sector in the field of tourism. This element is also known as the superstructure and is responsible for the overall smooth functioning of the whole system. It follows that the more important the tourism activity is for the region, the stronger and more efficient should be the superstructure that manages that territory.



**Figure 3** Roberto boullón's tourism system

Source: Boullón (2006)

Although these authors represent different approaches to visualise the tourism system, the actors are fundamentally the same, the difference lies mainly in relation to the tourism space according to the UNWTO (2005) and supra structure of Boullón (2006), the latter according to the approach to the tourism system more focused on the economic activity it produces, while Vera mentioned by Boullón (2006) makes a more spatial appreciation of the elements of the tourism system, somewhat more territorial.

### *Importance of Tourism Planning*

In order to work on the tourism development of a country or to promote it, it is essential to carry out a series of actions that must be aimed at achieving concrete and well-defined objectives, in order to then translate them into a coherent and integrated development plan.

According to Ander-Egg (2007), planning is to rationally foresee the actions to be carried out according to the resources and objectives to be achieved in order to generate transformations. In other words, planning is the decision on how to use the things at hand to get to where one wants to be.

It is a fact that tourism provides a country with substantial socio-economic benefits and, for this reason, many countries, developed and underdeveloped, see in these activities an opportunity to achieve sustained growth, a stable source of foreign exchange and an instrument of employment generation. Therefore, a country needs to have a number of preconditions, including a combination of natural, scenic, historical, archaeological, natural and climatic attractions. Tourism is not a panacea for a country's development either, as it certainly has great advantages, but it also has detrimental effects and consequences. It is therefore worthwhile to take stock of the known advantages and disadvantages of tourism development, which underlines the importance of careful planning (Quijano, 2009).

### *Concept and Importance of Tourism Diagnosis*

The tourism diagnosis is a study whose main objective is to know the current situation and potential of the tourism activity in the commune.

In order to carry it out, it is necessary to analyse its strengths and weaknesses, as well as its opportunities and threats (SWOT analysis) (Quijano, 2009).

### *Importance of the Tourism Diagnosis*

The diagnosis includes the analysis of: the current situation, the historical situation and the main obstacles to development, and points out the prospects for progress, taking into account the resources and potential of the geographical space, at sub-regional and regional level, and the existing structural conditions. In this primary phase of planning, the aim is to detect the main obstacles that impede the fulfilment of the image and the identification of the potentialities that could help to achieve it.

### *The functions of the Diagnosis.*

To measure the distance and the difference between the current real situation and the ideal future situation that this implies in the definition of objectives.

1. To corroborate and confirm at concrete levels the objectives set.
2. To provide the conditions that confirm and rectify the deadlines set for the achievement of the objectives.
3. Define and explain those internal or external variables that may constitute an obstacle to the process.

### *The process*

The diagnosis involves, among other areas, drawing up an inventory of resources and attractions that will allow to know, among other aspects, the five different tourism products, the stage in which each one of the products is: introduction, stabilisation and the type of demand that it motivates.

### *Tourism and regional development*

Tourism is the economic activity that has had the greatest dynamism in recent times at a global level.

It has become the spearhead of global capitalism, representing a very effective vehicle for financial globalisation and the movement

for financial globalisation and the worldwide movement of capital (Dachary and Arnaiz, 2002).

According to the World Tourism Organisation, tourism activity has grown at average annual rates of up to 7.2%.

Annual rates of up to 7.2%, tourist visits have exceeded 700 million in 2002, the UNWTO forecasts that by the end of 2002, the number of tourists will be over 700 million (Dachary and Arnaiz, 2002).

UNWTO forecasts that by 2020 tourist visits will be around 1560 million per year (UNWTO, 2005).

(UNWTO, 2005). The development of new information and communication technologies will further strengthen the growth of tourism activities. Further strengthen the growth of tourism activities, these figures allow us to infer that the tourism phenomenon of growing importance at a world level.

The development of new information and communication technologies will further strengthen the growth of tourism activities. globalisation phenomenon will further strengthen it.

Tourism has become one of the world's most centralised and competitive industries and almost no other economic sector so clearly illustrates the global reach of transnational corporations.

No other economic sector so clearly illustrates the global reach of transnational corporations.

In recent years, the industry has lobbied governments around the world to liberalise trade and investment in services, and it is likely to reap enormous benefits from this and investment in services, and is likely to reap huge benefits from the General Agreement on

#### *Trade in Services, a multilateral*

Trade in Services, a multilateral pact under the World Trade Organisation (WTO).

(WTO)

Tourism becomes a model within global capitalism as stated by Dachary and Burne (2006).

Burne (2006) and thus reproduces all its externalities. The model is of a real estate nature, produces spaces and territories with major influences and modifications of economic, social, political, cultural and environmental structures (Dachary and Burne, 2006). social, political, cultural and environmental structures (Rubio, Torres and Velázquez, 2014).

Capital determines its movements and moves from distant areas to the tourist spaces that they build, obeying always obeying the logic of the market, in many cases provoking high social costs borne by the receiving groups that social costs borne by the receiving groups, who become societies controlled by tourism developers and entrepreneurs developers and tourism entrepreneurs, (Dachary and Burne, 2006).

The complex nature of tourism leads it to manifest itself as a phenomenon in various contexts. The regional sphere is one of the most relevant insofar as it requires space for its development, it is a constructor and consumer of spaces and modifier of landscapes (Asaud, 2001).

Dachary and Burne (2004) clearly establish the relationship between tourism and regional development, using the approaches of P. P. P. P. P. P. P. P. P. P. P. P. P. P. P. P.

Using the approaches of Panosso (2012), Álvarez and López (2010) and Santos (1996) from the conception of space, taking it as an abstract reality or as a dialectical abstraction, where both material objects and human actions converge, typified as geographical objects, natural objects and social objects that manifest themselves in dynamics that characterise them, identified through the relations that are established between these groups, which in turn have the capacity to generate new relations, giving particularity to the spaces and to the society that is found in them, that is, the spaces begin to find their identity from this dynamic and are constructed socially and historically.

Tourism is part of human activity and, as such, it is carried out in a spatial environment, creates and appropriates territories, and thus and appropriates territories, significantly modifying the structures formed by the relationships between geographical, natural and historical objects.

Geographical, natural and social objects that are originally located in these spaces, its implications and its the implications and effects of this have led the governments of many countries to take up the theoretical principles of the theoretical principles of thinkers such as Perroux, who considers cities to be the ideal poles that as ideal poles that favour the creation of complex networks that produce both economies of scale and external economies that facilitate the economies of scale and external economies that facilitate the accumulation of capital (Santana Talavera, 1997).

As a result of these actions, the so-called poles of tourism development have emerged, which are nothing more than tourist cities created by the creation of a network of tourist resorts.

These are nothing more than tourist cities created ex profeso, giving rise to relations and modifications to the economic, social, environmental, political and cultural environment of great magnitude. Moreover, tourism corridors have emerged in which the poles are combined and spatially extended, resizing the effects of tourism on space, territories and regions on a larger scale, generating differentiated conditions in the development process.

The multiplier effect of tourism establishes forward and backward linkages in many economic activities, which gives a dynamic to regional economies, generating jobs, changes in the structure of income and consumption, but also generates inflationary pressures, insufficient supply of food and other goods for resident populations, population movements that also put pressure on public services, housing and in general on the standard of living, tourism uses natural or cultural resources that, depending on their forms of consumption, can lead to degradation and irreversible harmful effects.

*Ecotourism*

Ecotourism, according to Ibáñez and Rodríguez (2012), is a new conservation movement based on the tourism industry, defined as responsible travel that conserves the environment and sustains the well-being of the local community. It is accompanied by ethical codes and a huge group of international travellers, students, thinkers; it is supported by governments in a large number of countries.

It seeks education and recreation through observation and study of the values of the place, and its development should generate resources for its preservation and for the community.

Among the main activities carried out in ecotourism are: educational workshops, hiking, sidereal observation, flora and fauna rescue, flora observation, ecosystem observation, geological observation and observation of natural attractions. Some of these activities are defined in the following table:

Type of tourism	Activity	Definition
<b>Ecotourism</b>	Interpretive Hiking	Activity where the visitor travels on foot or in non-motorized transport, along a predefined cross-country path equipped with information cards, signs and/or guided by nature interpreters, whose specific purpose is knowledge of a natural environment. Tours are generally short in duration and educationally oriented
	<b>Sidereal observation</b>	Appreciation and enjoyment of the manifestations of the cosmos in the open field. Traditionally associated with stellar observation, with the increasing use of specialized equipment the range of objects observed has expanded to large expressions of the universe.



	<b>Environmental education workshops</b>	Didactic activities, in direct contact with nature and where possible involving local communities; Its purpose is to sensitize and make participants aware of the importance of the relationships between the different elements of nature..
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**Table 1** Classification of Ecotourism Activities

Source: own elaboration with data taken from the Ministry of Tourism (SECTUR), 2004.

According to Ibáñez and Rodríguez, (2012), rural tourism is that type of tourism that is carried out in non-urban areas, enhancing the culture, values and identity of the local population, through their direct and active participation in the provision of tourist services. This type of tourism complements traditional economic activities and allows positive exchange between visitors and recipients.

It should be noted that it does not necessarily link visitors to agricultural activities. Finally, it is worth highlighting that the main motivations for practicing this type of tourism are: contemplation of specific areas, the landscape, recreation and, of course, rest.

Type of tourism	Activity	Definition
<b>Adventure Tourism</b>	<b>Eco-archaeology</b>	Trips to archaeological sites in order to learn about the relationship between man and his environment in ancient times, based on the material remains left behind.
	<b>Agritourism</b>	It is based on the use of a rural environment, occupied by a peasant society, which shows and shares not only its idiosyncrasy and agricultural techniques, but also its natural environment in conservation.
	<b>Agro ecotourism</b>	They are the set of social relations resulting from the visit of eco-tourists to peasant communities, living with them.

	<b>Preparation and use of traditional medicine</b>	To get to know and participate in the rescue of one of the richest and oldest manifestations of Mexican popular culture, which is the preparation and use of traditional medicine, is the motive of different travellers.
	<b>Ethnotourism</b>	Trips that relate to indigenous peoples and their habitat in order to learn about their culture and traditions.
	<b>Gastronomic workshops</b>	These activities have the motivation to learn, prepare and taste the gastronomic variety offered by the hosts of the places visited.
	<b>Craft workshops</b>	This experience is based on participating and learning the elaboration of different handicrafts in the scenarios and with indigenous procedures.
	<b>Dialect learning</b>	Travel with the motivation to learn the dialect of the place visited, as well as its customs and social organisation.
	<b>Rural photography</b>	This activity is of great interest to travellers who like to capture in images the different cultural manifestations and natural landscapes of the rural environment.
	<b>Mystical experiences</b>	It offers the opportunity to live the experience of knowing and participating in the richness of the beliefs, legends and divine rituals of a people, inherited by their ancestors.

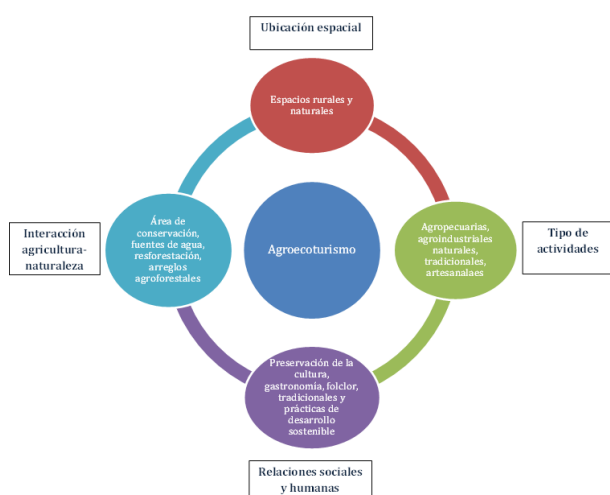
**Table 2** Classification of Rural Tourism activities

Source: own elaboration with data taken from Secretaría de Turismo (SECTUR), 2004.

## Agro-ecotourism and its elements

According to Ramírez (2014), agro-ecotourism is that which takes place in rural areas where agricultural or forestry activities are carried out, which in turn offers the specialised tourist the possibility of contemplating the natural attractions of flora and fauna present in spaces reserved for this purpose, sharing the culture, roots and customs of its inhabitants.

The above definition brings together the following elements that stand out in agro-ecotourism and are shown in Figure 4.



**Figure 4** Elements of agro-ecotourism

Source: own elaboration with information from Ramírez (2014).

Ramírez (2014) stresses that the areas of peasant, rural agricultural or non-agricultural influence have a rich culture, represented in the habits and customs, the varied and colourful typical gastronomy, the infrastructure in houses, old buildings and roads, as well as the vocabulary, folklore and traditional production practices which, combined with rural and nature activities, constitute a differentiated and holistic typology of tourism that is not limited to nature reserve areas, nor to agricultural work, but which finds in biodiversity its greatest product. This makes the socio-cultural component of agro-ecotourism one of the characteristics of the tourism typology, as it facilitates a more personalised and intimate interaction between the tourist and the receiving communities, which allows for a true understanding of the tourist experience, making the activity a true strategy of social and economic development for the populations and where socio-cultural tourism animation makes an excellent combination.

## Sociocultural Tourism Animation

According to Kalcheva (2016), Sociocultural Tourism Animation is a methodology of social intervention with the aim of promoting popular culture and generating experiences by creating conditions for the active participation of the consumer or subject; this is achieved through practices such as popular education, cultural promotion, leisure time education, leisure time education, social tourism development, and the combination of a sport and recreation perspective.

One of the fundamental aspects of socio-cultural tourism animation is that, through programmed and planned strategies and activities, the user can have an interaction with the place that surrounds him/her. This is extremely enriching, both in terms of personal and social development. When a tourist visits a destination, a value chain with economic benefits is developed. This is similar to the design of the tourism product developed in this project, where the tourist who visits a locality, consumes food in situ, carries out cultural activities and through the use of various services leaves an economic spill that brings benefits to the people who live in that place, that is, the tourist consumes local products and services and not industrial or commercial chains, which is why socio-cultural tourism animation adds personal and economic value that generates direct economic spill with artisans and local services, thereby achieving community development.

To achieve all of the above, we must not forget the main actor and important resource in the process of offering the tourist service, which is the animator, who is the person capable of motivating others to participate and integrate, through their psychosocial skills and knowledge, techniques and dynamics of working with groups, motivational strategies and pedagogical strategies that provoke the development of self-learning by tourists with the environment (Hernández, 2014).

## Methodology to be developed

This is an exploratory descriptive documentary research project.

The methodology was developed in the following 3 stages:

Stage 1: **COLLECTION OF BIBLIOGRAPHIC BACKGROUND:** a bibliographic review of background information that contributed to the object of the study was carried out (cabinet bibliography, Tourism Development Plans, Theses related to the object of the study, historical background, and Web pages).

Stage 2: **COLLECTION OF INFORMATION IN THE FIELD:** the characterisation of the locality of El Refugio was identified, the compilation, classification and ranking of the natural resources of the locality was carried out by means of the tourist inventory survey form and finally, through interviews with the local inhabitants, the degree of knowledge about tourism, its potential, the acceptance of tourism and the tourist product, as well as the determination of the type of demand.

Stage 3: **DESIGN OF THE TOURIST PRODUCT:** the tourist product was designed and its relationship with the resources and tourist attractions of the place, as well as its location in the territory.

**Results**

The locality of El Refugio has a wide variety of natural and cultural resources, which can be used to develop and promote tourism in the region. It is important to mention that its resources have not been exploited to date due to the lack of execution in the planning and promotion of the attractions it possesses; In addition, there is a visible lack of tourism awareness and culture, which has limited the development of this economic activity in the region, which is why the need arises to propose the creation of a tourism product focused on agro-ecotourism combined with socio-cultural tourism animation, which is capable of promoting tourism development and social integration to offer alternatives of differentiated tourism products that are an economic trigger for the inhabitants of the locality, thereby increasing the range of rural tourism development and nature to contribute to the sustainable development of the region.

The design of the tourism product is presented below:

Name		Agro-ecotourism and socio-cultural tourism animation in El Refugio.	
Animation product components	Pineapple crops Coffee cultivation Holistic and sensory experiences Flora (holm oak, holm oak, tepehuaje, papelillo, guapinol, soursop, banana, passion fruit, hibiscus, jihuite, myrtle, nanche, guamaras, huisache and capomo). Wildlife (deer, wild boar, badgers, armadillo, rabbits, doves and reptiles).		
Who it is aimed at	Market segment  Local and national tourism between 20 and 55 years of age.	Market Segment Characteristics Visitors who like to enjoy activities in contact with nature (agricultural and ecotourism), interested in holistic, sensory activities and meaningful experiences.	
Animation product description	ACTIVITY	CONCEPTUALISATION	
	Modality	Agroturismo-Ecoturismo	
	Equipment	Áreas adaptadas para ofrecer hospedaje en camping, alimentación con gastronomía artesanal de la etnia Cora y Huichol, servicios sanitarios básicos.	
	Physical state	Buenas condiciones	
	Seasonality	Todo el año	
	Requirements	Ropa cómoda y deportiva, cámara fotográfica y linterna	
	Description	Ver tabla 3 Itinerario producto turístico	
Price	\$ 1,300 por PAX		

**Table 3** Animation product design

Source: Own elaboration

Activity	Description	Activitys	Duration
<b>Day 1</b>			
<b>Visit coffee plantations</b>	Tour of the coffee plantations of Rancho "Don Chon"	Explanation of coffee production and processing (pulping, drying and roasting), coffee picking technique and coffee tasting, visitors will be able to buy coffee to take away.	9:30-11:00 hrs
<b>Hiking</b>	A tour to admire the landscape (flora and fauna).	Sighting of flora and fauna, visit to the "loca" stream and a tour of the pine groves.	11:00-14:00 hrs
<b>Handmade food prepared by the local hostesses</b>			14:00-15:30 hrs
<b>Craft workshop</b>	Participants will make traditional chaquira handicrafts.	Elaboración de Huichol handicrafts taught by Wixaric people from the community, cost of package \$150 pesos (includes material)	16:00-17:00 hrs

<b>Making of tents</b>	Visitors will set up tents for the overnight stay.	Visitors will be given explanations and instructions on how to set up their tents.	17:30-18:00 hrs
<b>Holistic meditation activity</b>	Participants will go through the process of meditation to renew the senses.	Activity to connect the senses through meditation in a natural environment using the Zen technique.	18:00-18:30 hrs
<b>Dinner</b>			
<b>Bonfire</b>	Sharing experiences for visitors and having a fun time	Through the dynamic of the comedy club, visitors will perform different types of comedy tests that will make them spend a fun and enjoyable evening with the aim of encouraging participants to get to know and interact with each other.	20:00 hrs
Activity Day 2	Description	Activities	Duration
<b>Natural energy recharge activity</b>	Participants will go through the process of vital energy renewal.	The activity consists of sunbathing for 10 minutes to recharge the energy stores in the body and vitamin D in the skin.	7:00-7:15 hrs
Breakfast (thanks and farewell)			8:00 hrs
Return to the place of origin			9:00 hrs

**Table 4** Tourist product itinerary

Source: own elaboration

## Acknowledgement

Tourism development in the state of Nayarit is an alternative to achieve the local development of the communities, it is considered a basic element to really look for the social and economic development that is so much desired. We are grateful to Ecorfan as a publisher of academic works, as their funding contributes to more academic researchers being able to publish and share the progress of their research, as well as to socialise it so that it can have a greater impact.

We thank the host community for having allowed us to develop this research that undoubtedly seeks to contribute to the improvement of social and economic conditions for the human development of the community.

## Conclusions

This project was carried out with the aim of taking advantage of and promoting the agro-ecotourism activity linking socio-cultural tourism animation as a tourist attraction offered in the town of El Refugio, for which a tourist product was designed around the activity of agriculture, complemented with ecotourism and rural tourism, which leads us to create an integral product that links the social, economic and cultural development of rural communities, mainly seeking to provide services, products and entertainment in places little altered by man.

The proposal of the agro-ecotourism product seeks to promote the valorisation of the activity by both the producer and the consumer through the knowledge of the places, the work, the process and the environment where coffee and pineapple are produced, which contributes to the strengthening of the identity and the well-being of the community's inhabitants.

Undoubtedly, the proposal allows the diversification of the natural attractions of the municipality to be used, which will make it possible to offer a differentiated and innovative product to tourists, thus providing a unique and revitalising experience.

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**COVID-19 in the San Juan del Río, Qro. restaurant sector, effects and Outlook****COVID-19 en el sector restaurantero de San Juan del Río, Qro., afectaciones y perspectivas**

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**Abstract**

COVID-19 burst in the whole world and put Mexico in challenging situations in several areas, in the State of Queretaro the government in turn implemented a series of measures decreed and suggested at national and international level to preserve the health of its citizens, among these measures was the temporary closure of various establishments where there was contact and coexistence of people, including local restaurants, which faced great challenges such as: dismissal of staff, emergent adaptation with survival strategies and sales, among others. The objective of this work is to find the impact of COVID 19 on the restaurant sector of San Juan del Río, Qro., as well as the future perspectives on the part of the businessmen, emphasizing the effects on the workers. The need to collaborate on the part of the local government in the total reactivation of the sector included in the program for the activation of tourism in the city is what summarizes the justification for this research. The synthetic analytical method was used, descriptive, mixed type, using an instrument with quantitative and qualitative elements to detect the impact of COVID 19 in the restaurant sector of the city, the perception of future perspectives and affectations in its human capital; 76 establishments were surveyed out of a total of 955 recognized and with denomination according to the National Statistical Directory of Economic Units (DENUE) and by the representative of the Queretaro Council of restaurateurs AC, although a tourist blog in the country, reports that there are 124 main ones. The main meetings: the variation in income, number of workers, salaries, priority activities, investment in pre and post COVID items, the future prospects of the sector and information on human losses and worker capacities by COVID-19.

**COVID-19, Restaurant Sector, Workers****Resumen**

COVID-19 irrumpió en el mundo entero y puso a México en situaciones desafiantes en diversas áreas, en el Estado de Querétaro el gobierno en turno puso en marcha toda serie de medidas decretadas y sugeridas a nivel nacional e internacional para poder preservar la salud de sus ciudadanos, dentro de estas medidas estaba al cierre temporal de diversos establecimientos en donde existía el contacto y la convivencia de gente, incluyendo los restaurantes locales, mismos que enfrentaron grandes retos como: despido de personal, adaptación emergente con estrategias de supervivencia y de ventas, entre otras. El objetivo del presente trabajo, encontrar el impacto del COVID 19 en el sector restaurantero de San Juan del Río, Qro., así como las perspectivas futuras por parte de los empresarios, haciendo énfasis en las afectaciones a los trabajadores. La necesidad de colaborar por parte del gobierno local en la reactivación total del sector que se incluye en el programa de activación del turismo en la ciudad es lo que resume la justificación de esta investigación. Se utilizó el método analítico sintético, tipo descriptivo, mixto, utilizando un instrumento con elementos cuantitativos y cualitativos para detectar el impacto del COVID 19 en el sector restaurantero de la ciudad, la percepción de perspectivas futuras y afectaciones en su capital humano; se encuestaron 76 establecimientos de un total de 955 reconocidos y con denominación de acuerdo al Directorio Estadístico Nacional de Unidades Económicas (DENUE) y por el representante del Consejo Queretano de restauranteros AC, aunque un blog turístico en el país, informa que son 124 los principales. Los principales encuentros: la variación en ingresos, número de trabajadores, salarios, actividades prioritarias, inversión en rubros pre y post COVID, las perspectivas a futuro del sector e información de pérdidas humanas y capacidades de trabajadores por COVID-19.

**COVID-19, Sector restaurantero, Trabajadores**

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## Introduction

With the appearance of the SARS VOC 2 virus there was a revolution or a disruptive social event, which changed the way of doing things, a great number of paradigms were broken, not only in Mexico, but in the whole world, in the State of Querétaro the government in turn put in place a series of measures decreed and suggested at national and international level to combat this pandemic, within these measures the temporary closure of various establishments where there was contact and coexistence of people was forced, including restaurants, economic entities that are part of the service or tourism sector, This is how we can find research such as that of Caldearte, Gifra and Akhmedova (2021), whose objective was to gauge the opinion of business leaders in this industry in Spain on the impact of COVID-19 on the food and beverage sector and its companies, and to find out their vision of the future in the face of the previous challenges and the new ones posed as a result of the pandemic; This research helped to identify the key factors in the sector that were in force in the pre-COVID-19 scenario, which are still relevant and which are no longer relevant, as well as the new priorities and urgencies that the post-pandemic world presents to the sector; Other research that can be mentioned are those of La industria restaurantera frente al Covid-19 by Martínez Lomelí (2020) and Montecinos (n.d.), which, because they refer to similar but not the same topics as our own, are discussed in the corresponding section; however, on the tourism sector in San Juan del Río, Qro. , only two research studies are detected, one by Pérez Bravo (2017) and the other by Pérez Guzmán (2021), the first on competitiveness and knowledge management in SMEs in the restaurant sector and the second on an analysis of the promotion of cultural tourism in the municipality of San Juan del Río, Querétaro, both theses, In other words, they are not current and do not provide information about the effects on the post-COVID 19 sector in the locality, which, as mentioned above, was affected by the temporary closures and thus the decrease in sales and the dismissal of employees, and in some cases the definitive closure of the sector. Therefore, the main objective of this research was to find out the impact of COVID 19 on the restaurant sector in San Juan del Río, Qro., as well as the future prospects for entrepreneurs, with an emphasis on the effects on workers.

## Theories

### *COVID-19*

COVID-19 or novel coronavirus as a pandemic in the words of Castro, (2020), began in December 2019 in Wuhan, Hubei province in China and was declared a global pandemic on 11 March 2020 according to Zigiang Xin (2020) although the World Health Organization (WHO) proclaimed it for the first time as a public health emergency of international concern in January 2020, according to the Pan American Health Organization (PAHO) which agrees with what was stated by Lizaroso, both in the same year 2020.

As stated by the WHO (2020), Coronavirus belongs to a large family of viruses that can cause disease in both animals and humans, and is known to cause respiratory infections ranging from the common cold to more serious illnesses such as middle and acute respiratory syndrome. On the other hand, another author who adds to this definition is Bachelet (2020) who stated that the disease is infectious, caused by the coronavirus which was discovered later in the pandemic. The aforementioned virus is mainly characterised by mild symptoms such as sore throat, cough and fever and can be more severe in some people and cause pneumonia or respiratory difficulties Gómez (2020) and was mainly spread by direct contact with infected people or by contact with surfaces with respiratory droplets (saliva or nasal secretions).

### **Restaurant sector**

As indicated by Sallés (2018), it is said that the restaurant sector has its beginnings in Egypt in 512 BC. c it is said that there is evidence that there was a public dining room in which dishes were served with a limited menu, the concept as a restaurant was already used in Paris France, as shared by Garduño (2007), where there was a place opened in 1765 where it served dishes accompanied by wine making it known as the first restaurant, over time there has been a continuous growth of this sector with a number of businesses as referred by Banner (2015), 515,059 establishments engaged exclusively in the preparation of food and beverages.



This restaurant sector is a set of establishments that are dedicated to the preparation of food and beverages instantly, Lopez (2015) the gastronomy industry has a permanent interaction with other economic areas, making the production chain of food preparation extends to sectors such as agriculture, livestock, fisheries and rural development, among others. Ferrari (2018) commented that the national restaurant sector has become an engine of the economy and one of the main generators of employment, with more than 428 thousand establishments, of which 96 per cent are micro, small and medium-sized businesses, representing a way for many Mexicans to develop their entrepreneurial spirit and start a business, Torruco (2015), for his part, argues that the restaurant sector has been essential in the country's tourism development, allowing Mexico to position itself in a privileged place in the world, by having a varied gastronomy, and a quality service at the height of the best in the world, it is assured that the restaurant industry in the country represents 2% of the national GDP and 15.3% of the tourist GDP.

**Methodology**

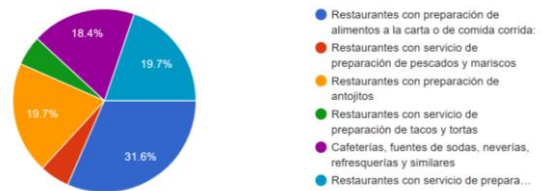
In this article we used the synthetic analytical method, descriptive type, the methodology applied focuses on the mixed research technique, using the survey through the questionnaire instrument consisting of two sections: general company data and questions on the Likert rating scale, in an instrument with quantitative and qualitative elements to detect the impact of COVID 19 on the city's restaurant sector. The information sought was related to the perception of the future of the sector after COVID 19, the impact of the crisis on the companies themselves, effects on human capital and future prospects, as well as personal reflections of the entrepreneurs; 76 establishments were surveyed out of a total of 955 (8%), recognised and named according to the National Statistical Directory of Economic Units (DENUE) and by the local representative of the Queretaro Council of restaurateurs AC, among which were also those mentioned in a tourism blog in the country which stated that there are 124 main restaurants.

**Results**

General data on the economic units:

Of those surveyed, 59.2% were owners, 19.7% directors or managers, 13.2% partners and the remaining 7.9% hold other positions; regarding the type of business 89% are local, 7.9% national and 3.1% foreign.

The income of these economic units that in 2019 were below 50,000 pesos per month was represented by 46.1%, those in the range of between 51,000.00 and 100,000.00 pesos per month were 28.9%, from 101,000.00 to 200,000.00 were 10.5% and more than 200,000.00 were 14.5%.



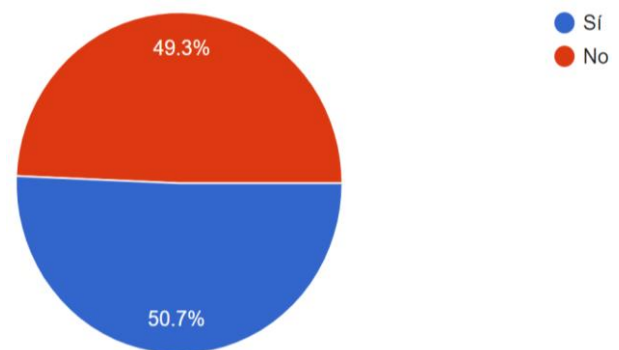
**Graphic 1** Segments of the restaurant sector in which respondents operate

Source: Own elaboration

Workers	2019	2023	Increment
Less than 10	71.1%	64.5	-6.6
11 to 50	26.3	30.3	4%
51 to 100	0	0	0
More than 100	2.6	2.6	0

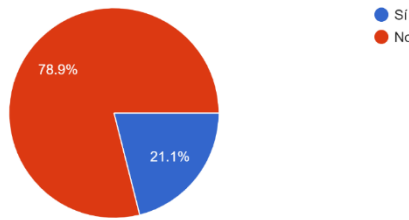
**Table 1** number of workers in economic units before the pandemic and nowadays

Source: Own elaboration



**Graphic 2** Respondents who lost a family member or worker to COVID-19 due to death

Source: Own elaboration



**Graphic 3** Workers who lost skills due to sequelae by COVID 19

Source: Own elaboration

Options	Number of respondents who strongly agree	Percentage of total
Sales will tend to start a growth process	21	27%
Alliances between restaurateurs will increase	36	47%
Home delivery sales will increase	21	27%
Local restaurants will gain market share	24	31.5%
There will be more innovation in the products and services offered	19	25%
Health preservation measures will continue	19	25%
Local restaurants will gain specific weight in sector decision making.	28	37.80%
Government involvement and support will grow	40	52.60%

**Table 2** Respondents' opinion on possible future developments in the local restaurant sector.

Source: Own elaboration

Indicator	Most cited indicator	Percentage of respondents citing the indicator
Invoicing for on-premises consumption	Decreased by 20%.	29%
Invoicing for door-to-door sales	Increased by more than 20%.	35.5%
Number of employees	Change insignificantly	33%
Variation in employee salaries	Changed significantly	39.5%

**Table 3** Changes in companies due to COVID 19

Source: Own elaboration

Indicator	Most cited indicator	Porcentaje de encuestados que citaron el indicador
Planned capital investments against 2019	Fallen by 10 to 20%.	39.5%
Investments in digital transformation projects	Increased by 5-10%.	42%
Investments in new product development vs. 2019	Grew by 5-10%.	35.5%
Investments in staff training vs. 2019	Increased by 5-10% Growth	42%

**Table 4** Changes in the companies in terms of investment volume as a consequence of COVID-19

Source: Own elaboration

In the open-ended questions, respondents expressed what they considered to be their main lessons learned from the crisis that began in March 2020.

On a personal level, they considered that they now value their work and their health as well as the people around them; they have learned about themselves in the face of adversity; they want to prepare and take better care of themselves, seek immediate medical attention for health problems, learn to save and make improvements in their habits, help their fellow human beings, etc.

In their company they consider that they learned to keep more controls to keep the business afloat, to work as a team and on sanitary measures; they learned to organise their time and not to take for granted that every year will be favourable, to prepare workers for innovation, to study the market and detect needs in order to implement efficient solutions, to learn to save. To have a better administration, to be attentive to strong changes, to take care of the capital of the business, to look for competitive prices and to be always at the forefront, offering quality products and services to continue positioning themselves, to take care of the personnel by providing them with the adequate training to give special attention to the client and also to elaborate the products with the corresponding hygiene, to keep a better control of expenses, to be resilient to future changes;

it is very important to use technology and platforms or applications to distribute their services at home; to learn how to make decisions under uncertainty; to keep the business as healthy as possible in terms of fiscal or financial debts and debts to suppliers.

At the sector level, they learned to comply with more regulations such as the preventive ones before COVID-19, about the opportunities to innovate and to seek the comfort of the diner, they learned about the strengths of their companies, that it is a vulnerable sector, that they must be resilient to unforeseen situations and adapt, be open to probable expansions to new markets.

This coincides with the responses of the respondents when asked to mention other aspects that they consider important and related to the future of the sector in the locality, highlighting that they consider it necessary to use social networks to expand their market share, use more technology and applications for home delivery of products, anticipate innovation because the market is always changing, emphasise hygiene and safety for diners, savings, be resilient, set competitive prices, attract tourism, request government support in terms of logistics, simplify procedures and financial support, and join development programmes for the restaurant sector, vary and innovate in the food offered.

## Discussion

After finding out about the variation in income, number of workers, salaries, priority activities, investment in pre and post COVID items, the future prospects of the sector and information on human losses and worker capacities by COVID-19 and analysing studies by other authors in this regard, it is realised that the study carried out in San Juan del Río, Qro, agrees in part with some of the research, for example, with the findings of Caldart Adrian, Gifra Júlia and Akhmedova Ana, (2021) where it was stated that the economic units studied in the food and beverage sector, They also find that the European Union (EU) is helping many sectors to recover and is boosting support for tourism, culture and the arts across the Union and making them more digital and sustainable.

Another research that agrees with the results is called gastronomic tourism vs. COVID-19 by the doctor in tourism Antonio Montecinos (n/d) in the magazine CEDOC in its special COVID-19, where he mentions that COVID would have many effects on gastronomic tourism and that it was necessary to contribute to the resilience, recovery and regeneration of the sector; He highlights here as an important finding that resilience in gastronomy and gastronomic tourism is required for its recovery, a sustainable and competitive regeneration with a profound social and spiritual transmutation, good governance and a sustainable, innovative and intelligent food system, as well as the production and consumption of regional products with quality labels and the prioritisation of endemic ingredients. This is consistent with the comments made by respondents to the local research that there is a need to be resilient in the face of the challenges currently being faced by the changes demanded by the pandemic, as well as the consumption of regional or endemic products.

The local research findings also agree with data from the research study La industria restaurantera frente al Covid-19 by Martínez Lomelí (2020), where he stated that in the midst of the pandemic, the industry was forced to reconvert in order to offer its takeaway food services and in the organisation of staff for food preparation; they highlight the importance of the restaurant industry in the life of society and its experiences as essential places in everyday life for socialising, in the generation of employment and in its contribution to national economies. Martínez Lomelí (2020) stated how chefs predicted and speculated that it would be very likely that, at the end of the pandemic, hygiene control regulation measures in public places would change and become stricter in relation to the maximum seating capacity of restaurants, the minimum compulsory distance allowed between diners, the provision of toilets at the entrance or the compulsory use of mouth covers. This information is consistent with what was also stated by local respondents that the sanitary measures put in place in and during the pandemic have remained part of the new order forever, such as the use of the washbasin at the entrance, the use of gel and the ventilation of the premises.

## Conclusions

After surveying 76 establishments out of a total of 955 (8%), recognised and named according to the National Statistical Directory of Economic Units (DENUE) and by the local representative of the Queretaro Council of restaurateurs AC, of which the data was obtained that of these 59.7 were owners and 19.5% were managers, and 89.6% were local businesses, mainly restaurants with food preparation, a la carte or set meals 32.5% and preparation of pizzas, hamburgers, hot-dogs and rotisserie chicken to take away 19.5% and antojitos 19.5%. It was found that the number of workers in companies with less than 10 workers decreased by 6.6% from 2019 to 2023 and in companies with between 11 and 50 workers this number increased by 4%; it was also found that 51.3% of respondents lost a family member or worker to COVID 19 due to death and that 20.8% of employers stated that workers had sequelae due to COVID 19 that affected their capacities although not in a relevant way such as to affect their work activities.

Regarding possible future developments in the local restaurant sector, it was found that, optimistically, it is believed that alliances between restaurateurs will be maintained 47%, that there will be support and participation from the government 52.60%, that there will be a process of growth and participation in the market, that door-to-door sales and sanitary measures will be maintained, and that there will be 'more innovation in products and services that will be offered'.

On the other hand, changes were observed in the companies due to COVID 19, such as a decrease in sales by on-site consumption and an increase in door-to-door sales in terms of the number of employees and the variation in their salaries were insignificant. Although planned capital investments decreased, investments in digital technology development, new product development and staff training increased.

It could also be noted that, on a personal level, there was personal and/or spiritual growth, since there was a great deal of learning, as the respondents stated that they value their work and their health, as well as the people around them; they learned about themselves in the face of adversity; they want to prepare themselves and take better care of themselves, as well as improve their habits and help their fellow human beings. At the company level, they also learned about the urgent need to keep health, financial and administrative controls, especially to know how to plan time, activities and investments, to work as a team, to know how to make decisions in uncertain conditions and to be attentive and resilient to emerging changes, to improve and innovate in their products, to take care of their staff and to use technology to the benefit of the company. At the sector level, they learned to work as a team as they united in the face of uncertainty, to comply with more regulations such as the preventive ones before COVID 19, to use the opportunity to innovate in the threat and to take care of the diner and the worker.

As for future expectations for the sector, they visualise it with optimism and growth, they highlighted the importance of continuing to use what they have learned during the pandemic, such as technology and social networks, although they also visualise the need to request government support in terms of logistics, simplification of procedures and financial support, as well as access to development programmes for the restaurant sector.

As the restaurant industry is an important pillar of the local economy and job creation, as well as a support for tourism, and as it is still overcoming the negative effects of the COVID 19 pandemic, it is necessary for local and state governments to establish agendas and programmes to support or rescue the sector, It is also important to promote among them the consumption of regional products, as well as to maintain the sanitary measures established during the pandemic regarding the care of production, transportation, handling, preparation, consumption of food, workers' equipment, and in general what has been learnt about good hygiene practices for the hygienic handling of food throughout the production process.

Unfortunately, there were losses in families and workers in the restaurant sector, the number of workers and their salaries in businesses of less than ten, i.e. in micro-businesses, and entrepreneurs were under financial pressure, but this was a great personal, business and sectoral learning experience that they will know how to use to their advantage in any situation, after all, as the representative of the sector in the locality stated, "after COVID 19 nothing is the same anymore".

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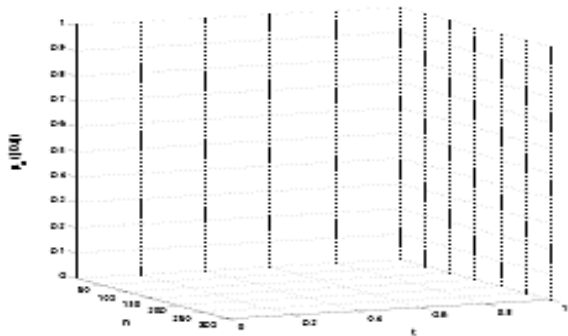
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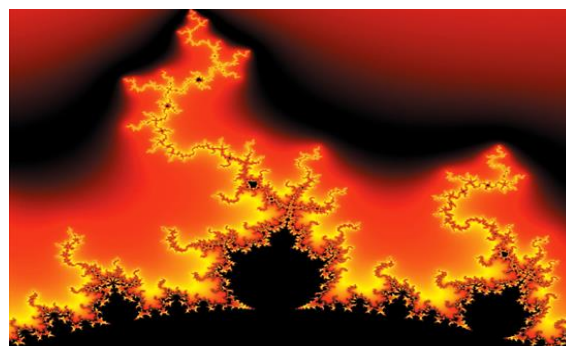
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