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RINOE Journal-Public Economy

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Support the international scientific community in its written production Science, Technology and Innovation in the Field of Social Sciences, in Subdisciplines of Structure and scope of government; Taxation, Subsidies, and Revenue: Efficiency, Optimal taxation, Incidence, Externalities redistributive effects, Environmental taxes and subsidies, Personal income and other Nonbusiness Taxes and subsidies, Business taxes and subsidies, Tax evasion; Fiscal policies and behavior of Economic Agents: Household, Firm; Publicly provided goods: Public goods, Publicly provided private goods, Project evaluation, Social discount rate; National government expenditures and related policies: Government expenditures and health, Government expenditures and education, Government expenditures and welfare programs, Infrastructures, Social security and public pensions, National security and war, Procurement; National budget, Deficit, and Debt: Budget, Budget systems, Deficit, Surplus, Debt, Debt management; State and local government; Intergovernmental relations: State and local taxation, Subsidies, and Revenue, State and Local budget and expenditures, Interjurisdictional Differentials and their effects, State and Local Borrowing, Intergovernmental relations, Federalism; Miscellaneous issues: Governmental loans and credits, Governmental property, International fiscal issues.

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Presentation of the content

In the first article we present, *Evaluation tools and strategies used in customer service in micro and small businesses in the city of Chihuahua*, by Minor-Avila, Dulce Carolina Helo-Leos, José Roberto, Andrew-Sotelo, María Elena and Yáñez-Castañeda, Verónica, with adscription in the, Universidad Tecnológica de Chihuahua, in the next article we present, *Knowledge management factors in companies and their association with the performance of a tourist destination*, by Hernández-Ponce, Oscar Ernesto, De La Mora-Yocupicio, Arturo and Ramos-Godínez, Claudia, with adscription in the Instituto Tecnológico de Sonora, in the next article we present, *Diagnosis to determine the degree of indebtedness of households in Ciudad Obregón, Sonora*, by Osuna-Marrufo, Ericka Gudalupe, Acosta-Mellado, Erika Ivett, Ruíz-Pérez, Roberto and Valenzuela-Reynaga Rodolfo, with adscription in the Instituto Tecnológico de Sonora, in the last article we present, *Inclusive and participatory management of urban parks in Puerto Vallarta: perspectives and challenges in a tourist context*, by Reyes-González, Alberto, Valdez-Olmos, Fernando Daniel, Reyes-González, Andrés Enrique and Odetti, Jimena Vanina, with adscription in the Tecnológico Nacional de México.

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Evaluation tools and strategies used in customer service in micro and small businesses in the city of Chihuahua

Herramientas y estrategias de evaluación utilizadas en el servicio al cliente en las micro y pequeñas empresas en la ciudad de Chihuahua

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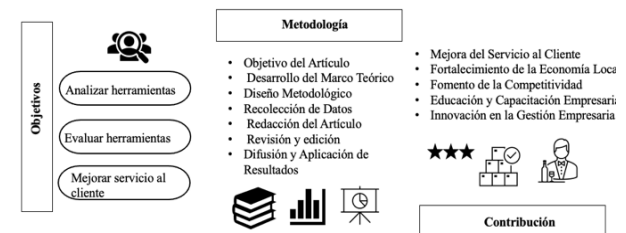
Abstract

The general objective of this research is to explore the tools and strategies used by micro and small enterprises (MSEs) in Chihuahua to evaluate and improve customer service during the first half of 2024. Specific objectives include identifying the most commonly used tools, analyzing their application through interviews with entrepreneurs, and proposing activities to enhance customer service. The methodology involves exploratory research with focus groups and in-depth interviews, using 12 open-ended questions in the Gesell chamber at the Universidad Tecnológica de Chihuahua. Thirteen entrepreneurs from commercial and service MSEs participate, and nine in-depth interviews are conducted. The research reveals that evaluating customer service is crucial for obtaining information about service perception and capitalizing on business opportunities, which is reflected in increased profits.



Resumen

El objetivo general de esta investigación es explorar las herramientas y estrategias utilizadas por las micro y pequeñas empresas (mypes) en Chihuahua para evaluar y mejorar el servicio al cliente durante el primer semestre de 2024. Se plantean objetivos específicos, como identificar las herramientas más utilizadas, analizar su aplicación a través de entrevistas con empresarios, y proponer actividades para mejorar el servicio al cliente. La metodología incluye una investigación exploratoria con grupos de enfoque y entrevistas en profundidad, utilizando 12 preguntas abiertas en la cámara Gesell de la Universidad Tecnológica de Chihuahua. Participan 13 empresarios de mypes comerciales y de servicios, y se realizan nueve entrevistas en profundidad. La investigación revela que evaluar el servicio al cliente es crucial para obtener información sobre la percepción del servicio y aprovechar oportunidades de negocio, lo cual se refleja en un aumento de las utilidades.



Evaluation, Service, Clients

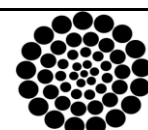
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Introduction

This document shows the tools and strategies that micro and small enterprises in the city of Chihuahua, Chihuahua use to evaluate customer service, which is understood as all those activities and processes that a company carries out to satisfy the needs and expectations of its customers, ranging from attention and follow-up before, during and after a purchase, to problem solving and complaint management. In addition to answering questions or solving problems, customer service also allows SMEs to foster customer relations and maintain customer loyalty.

It is mentioned that 'Customer service is not only about solving problems, but also about anticipating customers' needs and exceeding their expectations. This creates loyalty and promotes a long-term relationship between the company and its customers' (Ariza Ramírez & Ariza Ramírez, 2016).

To find out, through qualitative research, the tools and strategies of SMEs in the evaluation and improvement of customer service in the city of Chihuahua, in the first half of the year 2024.

Identify through two focus groups of entrepreneurs, the most used tools and strategies, analyse the application of tools and strategies with interviews with entrepreneurs, identify if these tools and strategies applied generate an increase in profitability and propose complementary activities to the MSMEs to strengthen customer service. The customer is the reason for the existence of any business (Albrecht & Bradford, 1990) and the reason why companies direct their policies, products, services and procedures towards satisfying their expectations (Pérez, 2006).

The above allows information to be gathered to accept or reject the hypothesis, which states that micro and small businesses use tools and strategies for the evaluation and improvement of customer service, which leads to increased sales and strengthened attention to their target market.

The article is composed of sections that give structure to the research, it describes the methodology used in the research process, the results obtained, conclusions and recommendations to the companies and/or representatives of the same, in the document there is also the section of annexes in which the instrument used and information that supports and complements the research is evidenced and finally the section of references.

Problem

What promotional tools and strategies are used by SMEs in the evaluation and continuous improvement of customer service?

Objectives

General objective

To find out, through exploratory research, the tools and strategies used by SMEs in the evaluation and improvement of customer service in the city of Chihuahua in the first half of the year 2024.

Specific objectives

- To identify, through focus groups of entrepreneurs, the evaluation tools and strategies most commonly used by the MSMEs.
- To analyse the application of tools and strategies through interviews with entrepreneurs.
- To identify whether the tools and strategies applied generate an increase in the usefulness of the MSEs.
- To propose complementary activities to the MSEs to strengthen customer service.

Hypothesis

Micro and small enterprises use tools and strategies for the evaluation and improvement of customer service to increase sales and strengthen the attention to their target market.

Methodology

Type of research

An exploratory research is carried out to collect information with a questionnaire to two focus groups with the process of saturation of categories, and in-depth interviews to entrepreneurs of micro and small enterprises in the city of Chihuahua, to identify if they use tools and strategies to evaluate customer service. (In the exploratory research a representative sample of the universe is not required). For the research, 12 open questions are posed for the focus group which is carried out in the Gesell chamber in the facilities of the Technological University of Chihuahua. Thirteen entrepreneurs from micro and small commercial and service enterprises participate in the focus groups (five in the first group and eight in the second).

Nine in-depth interviews were conducted with entrepreneurs with the support of students from the Business Development course as moderators and interviewers. The evaluation instrument is elaborated according to the problem statement and the research objectives. In the application of the research instrument, the aim is to identify the line of business and size of the enterprises. Questions 1 to 14 focus on identifying whether customer service is important, the quality they provide, as well as the tools they use to evaluate the quality of service and the benefits of the evaluation.

Eleven questions are elaborated to be applied in the in-depth interview regarding the importance of the use of tools for the evaluation of customer service.

Selection of interviewees

Entrepreneurs of micro enterprises and entrepreneurs of small enterprises through referrals in May 2024.

Box 1

Table 1

Name of the companies of the owners interviewed

Interviews	Interviewed owners
Objective.	Micro and small enterprises
To analyse the application of tools and strategies with interviews with entrepreneurs.	Barber DiCampo Inglés Vital Monte Horeb (tortillería) Sport Garden Seguros con alma Agente de seguros Higher Kicks Ever-Green Solutions.

Source: [own elaboration]

Selection of panelists for the focus group.

A selection of micro and small business entrepreneurs was made by convenience in May 2024.

Design of the assessment instrument for in-depth interview

1. When does the company start operations?
2. What market is the product and/or service aimed at?
3. How do you consider the quality of the service provided by your employees to the customer?
4. What tools do you use to measure customer satisfaction?
5. Have you implemented strategies for your employees to provide quality service and what are these strategies?
6. How do you evaluate service quality?
7. Have you lost customers because of your staff's attentiveness?
8. What corrective actions do you take if this situation occurs?
9. What kind of advice or training (for your employees) would you like to receive in order to improve customer service?

Article

10. Would you like students of Business Innovation and Marketing to do their internships in your company in order to carry out a customer satisfaction improvement project?
11. Would you like professors from the Business Innovation and Marketing course to carry out an analysis and development of strategies for quality in customer service?

Designing the evaluation instrument for the focus group

Business activity

Industria _____ commercial
 _____ service _____

Company size

Micro (1-10 employees) _____ small
 _____ (11-50 employees)

Years of staying in the market

1 to 2 years _____ 3 to 4 _____ 5 to
 6 _____

1. What is customer service for you?
2. Do you consider it necessary to measure the satisfaction of the service you offer to your customers?
 Yes _____ why? No _____ why?
3. Do you measure customer satisfaction?
 Yes _____ No _____ (Why?)
4. If yes, what tools do you use to measure customer satisfaction?
5. What benefits has this information given you?
6. What changes have you made since you started the company so far, considering the monitoring of customer service?
7. How do you perceive the customer service-sales-loyalty relationship?
8. Have you sought expert advice to assess customer service, and what kind of advice?

9. Have they lost customers as a result of poor quality customer service? How do they perceive the loss of customers?

10. Brainstorm what customer service quality measurement tools you are familiar with.

11. What customer loyalty strategies do you use to retain customers?

12. How do you evaluate and how often do you evaluate the quality of service you provide to your customers?

13. What aspects of customer service do you evaluate?

14. what benefits have you perceived when you evaluate the quality of service and implement improvements?

10. what is the best way for your company to carry out a customer satisfaction improvement project?

11. Would you like professors of the Business Innovation and Marketing degree to carry out an analysis and development of strategies for quality in customer service?

Theoretical Framework

Customer service refers to all those activities and processes that a company undertakes to meet the needs and expectations of its customers, from service and follow-up before, during and after a purchase, to problem resolution and complaint handling. Customer service is not only about answering questions or solving problems, but also about creating positive experiences and building relationships to foster brand loyalty. This can involve providing personalised attention, maintaining clear and effective communication, offering quality products and ensuring that customers feel valued and listened to at all times. Attracting and retaining customers is critical to a business, attracting new customers allows you to increase your customer base, which in turn can lead to higher sales volume and profits. Retaining existing customers is equally important, as their loyalty can generate recurring revenue over time. Both strategies are essential for a company's long-term growth and success.

Due to the interest shown by companies to meet the quality and needs of customers in terms of the service provided, the need arose to define the term quality in service (Llorens and Fuentes, 2000), undoubtedly, we can confirm it every day when 'customers buy from the company that offers the highest value perceived by them; that is, they evaluate the difference between all the benefits and all the costs of a market offer in relation to the offers of the competition' (Kotler & Armstrong, 2012) p. 13.

Thus, we can mention the importance of quality in products or services, from the business point of view, is related to the extent that a good or service meets the needs and expectations of customers, this perspective is not limited simply to meet technical specifications, and includes aspects such as reliability, durability, functionality, safety, and customer's point of view on the excellence of the product or service, in the business environment, quality is not only a desirable feature, but a fundamental strategy for long-term success. It involves the execution of production or service delivery processes and standards that ensure consistency and uniformity in the delivery of products or services free from defects or errors. It also involves the company's ability to adapt and continuously improve in response to changing customer feedback and needs.

Quality in products or services is also closely linked to brand reputation and customer satisfaction. High quality products or services not only generate satisfied customers, but can also help differentiate a company from its competitors and build a loyal and brand-loyal customer base.

To understand and intertwine the concept it is mentioned that 'the importance of product quality in the public mind has resulted in it becoming a top priority for most organisations' (Juran & Gryna, 1995 p. 11).

Customer loyalty is a business strategy designed to keep existing customers engaged and loyal to a specific brand, product or service. Rather than focusing on acquiring new customers, customer loyalty seeks to strengthen relationships with existing customers so that they will continue to buy repeatedly and become brand advocates.

'A good approach to a given loyalty programme requires a reflection on each and every one of the phases leading to its implementation' (Arranz & Gómez, 2014). Along with satisfaction surveys because they are tools used by companies to collect information about customers' opinions on their products, services or experiences. These surveys usually contain a series of questions designed to evaluate aspects such as product or service quality, customer service, response times, facilities, customer follow-up, among others.

The main purpose is to obtain direct feedback from customers to understand their needs, expectations and perceptions about the company, this allows the company to identify areas of opportunity and make corrective actions to increase customer satisfaction and strengthen relationships with them, the key to design these surveys is to design clear and meaningful questions to ensure that the survey is easy to understand and answer, can be conducted online, telephone or within the facilities, among others, so we can emphasise the importance of customer satisfaction. Satisfied customers offer the company the promise of increased profits and reduced operating costs' (Dutka, 2001).

In Chihuahua, the Escuela de Negocios Competitivos y Economía Solidaria (ENCES) supports with courses and trainings that serve as strategies for customer use in micro and small enterprises (MSMEs), a competitive advantage that contributes to the development and strengthening of business enterprises, enabling them to better understand the needs and expectations of their customers. By collecting and analysing data on customer satisfaction, perception of service quality and areas for improvement, businesses can adjust their practices and processes to deliver more personalised and satisfying experiences. This not only helps retain existing customers, but can also attract new customers through positive recommendations and reputation. By understanding customer preferences and behaviour patterns, companies can develop new products or services that better meet market needs. This gives them a competitive advantage and allows them to differentiate themselves in an increasingly saturated business environment.

Another important benefit is improved operational efficiency and value for money. By regularly assessing customer service performance, companies can identify inefficient or redundant processes and take corrective action to improve productivity and reduce costs. This is crucial for MSMEs, which often operate with limited resources and must maximise every opportunity to ensure their long-term viability. Development and Competitiveness Directorate (n.d.)

Results

Relevant responses from the panellists in the focus groups are presented below:

Box 2			
Table 2 Tabulation of responses			
Relevant aspects	Qualification	Measuring tools	Improvement strategies
Customer service	Excellent to good	The vast majority mention that they do not use them	Introduce and promote the use of tools
Quality	On average good	The vast majority say they do not use them	Defining clear quality standards for products or services
Customer satisfaction	Good to fair	The vast majority say they do not use them	Create customer loyalty and rewards programmes
Evaluation	If you rate the service	They do not have tools	Establish a system for collecting and analysing evaluation data

Source: own elaboration

Qualitative analysis of the focus groups

The objective of the focus groups is to identify the evaluation tools and strategies most commonly used by the MSMEs for customer service in order to propose strategies to improve customer service. Annex table 2. The participants of the first focus group have an entrepreneurial profile and work in areas such as: medicine and pharmaceuticals, leasing of flats, marketing and advertising services, insurance and bonds, advertising design. Most of them provide a service, but they are also traders of products aimed at the final consumer.

The members of the second focus group are involved in services such as banquets, internet, shadow teachers, as well as an architectural firm, and in the commercial sector they sell tamales, American clothing and car lots.

According to the data obtained, the companies have been established for an average of five years in the market, and the workforce ranges from three to thirty employees.

The number of employees may increase in the case of marketing and advertising agencies, as it depends on the size of the project to be developed, but five members of the second group have no staff.

The entrepreneurs consider it important to provide quality in customer service and agree that they must emphasise its measurement, which is why they are concerned and busy training their employees so that the service they provide to their clients is better and better. They say that in this way they are able to know what is being done well and what needs to be improved, in addition to using the information to solve the faults that arise, through the creation and implementation that contribute to the development and permanence of the company in the market. For this reason, the businessmen agree on applying a survey for post-sales follow-up, which is one of the main tools they use to measure the quality of the service provided to their customers, and which consists of three to five questions and is sent by e-mail. In the case of the leasing area, the businessman considers that tenants are satisfied with the agreement and the treatment they are given, since in all cases they remain in the property until the contract is terminated.

For their part, two of the panellists stated that they have not paid much attention to the use of tools to evaluate the quality of customer service, however, when reviewing the rating that customers make, through Google Maps, it reaches five stars, this criterion being the highest, so indirectly this tool is the one they use, especially those who are dedicated to the pharmaceutical industry.

The rest of the panellists have used satisfaction surveys and pre-service surveys, the latter with the aim of detecting whether they come by recommendation and their application carried out both physically and electronically, storing the information collected in databases, as well as using complaint and suggestion boxes, emphasising that none of them buy or hire any 'paid' tool or software to monitor, evaluate or measure the quality of customer service.

With respect to the second group, three of the participants indicate that they use the exit survey, while in the case of the shadow teacher, she only presents monthly reports on the progress of the work done with the child, while the representative of the architectural firm claims to carry out a follow-up survey of the work, and two of the panellists agree with the first group in the sense of using social networks, and only one does not carry out the measurement.

The entrepreneurs recognise that measuring the quality of customer service allows them to improve and obtain information to adapt the forms of customer service and create strategies that contribute to work to ensure customer retention and loyalty and increase sales and income.

In terms of making changes in the ways of monitoring and evaluation, they comment that fortunately they have always had customers, but not loyal customers, i.e., they did not keep the same ones and many did not repeat the purchase, the reason being that there were no actions to retain them and make them loyal, so they opted to strengthen communication mechanisms, attend and monitor interactions and metrics on social networks, in addition to new customer service strategies and, today, in the words of the entrepreneurs: 'happy together'.

For those in the health sector, they have opted to create a 24-hour hotline to provide 24-hour service, especially in emergencies, in response to patients' suggestions, which has had excellent results.

In the case of flat leasing, establishing clear policies has allowed them to maintain a captive market. Others mention that they changed the way they approached the client, for example, changing the phrase 'what do you want' to 'how can I help you' or 'what can I do for you'. Others comment that talking less so that the customer does not get lost with so much information, being specific in what the customer wants to hear has yielded positive results.

Box 3



Figure 1

Focus group using Gesell camera at the Technological University of Chihuahua

Source: (Own elaboration)

In the second focus group, they say that measuring customer service led to the expansion of the range of products they offer, inventory control processes, concern and care for the training of workers with the intention of personalising customer service and even restructuring the staff of suppliers. In addition, to develop new advertising campaigns, discount programmes, but above all to develop a culture of honesty and transparency with their customers.

As for customer loyalty, this has been maintained and increased with the changes made after evaluating customer service satisfaction (the customer feels that there is personalised attention) and therefore there has been an increase in sales.

Two focus groups are carried out for the saturation of categories, which results in coincidences in the answers of the panellists of both groups, and in the appearance of strategies that allow validating the approach and objectives of the research, and it is not necessary to carry out one more focus group.

Box4



Figure 2

Focus group participants, observation from the Gesell chamber at the Technological University of Chihuahua

Source: Own elaboration

Qualitative analysis of the in-depth interview

The aim of the in-depth interview is to identify whether entrepreneurs use tools and strategies to evaluate customer service, which will allow them to propose strategies to improve customer service. See table 2. appendices.

The following questions can be answered openly and provide experiences or examples that contribute to the analysis of the strategies that entrepreneurs use for customer service. The in-depth interviews were carried out with a total of eight entrepreneurs; three of them have been in the market for eight years, and the rest (five) have been in the market for 2, 5, 7, 14 and 35 years, respectively. Of all the interviewees, 50 % have a service business.

Regarding the quality of service offered by employees to customers, the assessment is as follows: two entrepreneurs consider it to be excellent, two more consider it to be good, another two consider it to be good, while of the two remaining participants, one states that it is average and one more defines it as 70%.

As for the tools they use to measure customer satisfaction, there are varied responses: one of the entrepreneurs says that he installs cameras in the customer service area to observe the performance of his employees, in addition to consulting the comments written on social networks; another entrepreneur indicates that he carries out the assessment by monitoring personal treatment; he also mentions that he monitors this aspect through comments expressed by salespeople in digital surveys; and only three of the participants agree that they consider the process of evaluating the quality of the service.

Two entrepreneurs agree that they carry out constant supervision of employees, and four identify training as an essential measure, one states that a reward system for employees to ensure motivation for good performance cannot be missing, and finally, only one of the interviewees acknowledges not using any strategy.

The interviews focus on whether the lack of attention from the team of workers to the clients causes a loss or decrease in the client portfolio, the answers to these questions are recorded as follows: five people recognise that it is a fundamental factor and that it does have a considerable influence, one of them attributes it to the lack of merchandise and two comment that they do not identify any situation within the company's operations that could be linked to it.

In addition, they are asked about the corrective actions they take when they detect the loss of a customer, a result associated with poor customer service or bad service, and they respond that they resort to dismissing or changing the employee's area, actions that reinforce supervision, contact with the affected customer, or have mediation between the customer and employee, in addition to talking to the employee involved about the consequences of their bad performance.

In response to the questioning about the acceptance of the entrepreneurs to receive advice from professors of the Business Innovation and Marketing degree at the Utch (Technological University of Chihuahua), to analyse and develop strategies focused on strengthening the quality of customer service in order to guarantee it, all the interviewees stated that they agreed to receive advice

Box 5

Entrevista a mercado barber

Figure 3

In-depth interview with businessman in the city of Chihuahua

Source: own elaboration

Conclusions

According to the results of the focus groups and interviews with entrepreneurs in Chihuahua, it is important to evaluate customer service, as it is through the use of these tools (exit interview, customer follow-up, and constant supervision of employees) that relevant information is obtained on the perception of customer service and service, and business opportunities are strengthened, reflected in increased profits. Likewise, in the analysis of the application of strategies to improve service, the implementation of employee reward programmes, constant training, among others, stand out.

It is recommended that companies link up with the education sector, specifically with the Business Innovation and Marketing degree programme at the Technological University of Chihuahua, through the internship process included in the curriculum. The internship is the four-month period in which students develop projects and/or proposals for improvement in the productive sector, with the aim of putting into practice the professional skills acquired throughout their academic preparation, and thus generate added value to the business community, achieving a bilateral benefit. According to the Technological University of Chihuahua (n. d.), students carry out two internships throughout their studies: the first one in the last term of the Technical University Degree (TSU) and the second one in the last term of the Bachelor's Degree.

During these internships, students develop a project within a company, which allows them to gain work experience before graduating.

Annexes**Box 6****Table 3**

In-depth interview questionnaire. Detect needs in order to provide counselling

Question	What we are looking for
When does the company start operations?	Identify the strength of the business.
What market is the product and/or service aimed at?	Positioning in the market
How do you consider the quality of service provided by your employees to the customer?	Employee training
What tools do you use to measure customer satisfaction?	Traditional and/or digital.
Have you implemented strategies for your employees to provide quality service and what are these strategies?	To know the degree of importance of customer service
How do you evaluate service quality?	Identify evaluation tools
Have you lost customers due to staff attentiveness?	Identify customer service failures
What corrective actions do you take if this happens?	Identify continuous improvement
What kind of advice or training (for your employees) would you like to receive to improve customer service?	Identify training issues
Would you like to have students from the Business Innovation and Marketing degree to do their internships in your company to carry out a customer satisfaction improvement project?	Whether they are willing to have trainees in their company to develop customer service improvement strategies.
Would you like professors from the Business Innovation and Marketing course to carry out an analysis and development of strategies for quality in customer service?	To find out if employers are interested in professional advice from teachers rather than agencies.

Source: own elaboration.

Box 7**Table 4**

Questionnaire for focus group. Detect needs to provide counselling

Question	What we are looking for
What is customer service for you?	Identify how important it is for the entrepreneur
Do you consider it necessary to measure the satisfaction of the service you offer to your customers?	If they consider measurement relevant
Do you measure customer satisfaction?	To find out what tools they use.
If yes, what tools do you use to measure customer satisfaction?	Identify whether the tools are relevant
What benefits has this information given you?	Updating tools to stay in the market
What changes have you made since you started the company, considering the monitoring of customer service?	Identify the importance of the client for the company
How do they perceive the customer service-sales-loyalty relationship?	Whether they are interested in seeking advice
Have they sought expert advice to assess customer service, and what kind of advice?	Monitoring customer service
Have they lost customers as a result of poor quality customer service?	Identify 100% of opportunity
How do they perceive the loss of customers?	Identify the most popular tools
In a brainstorming session, what customer service quality measurement tools do you know?	Identify strategies to strengthen the relationship with the customer.
What customer loyalty strategies do you use to retain customers?	Identify 100% evaluation
How do you evaluate the quality, and how often, of the service you provide to your customers?	Identify key aspects of customer service.
What aspects of customer service do you evaluate?	Utility of customer service evaluation.
What benefits have you perceived when assessing service quality and implementing improvements?	Identify how important it is for the entrepreneur

Source: own elaboration.

Statements**Conflict of interest**

The authors declare that they have no conflicts of interest. They have no known competing financial interests or personal relationships that might have appeared to influence the article reported in this paper.

Authors' Contribution

Minor-Avila, Dulce Carolina: Primarily responsible for the design and conduct of the research. She was responsible for the conceptualisation of the study, developed the general and specific objectives, and led the coordination of data collection activities. In addition, he supervised the elaboration of the evaluation instrument, participated actively in the analysis of the results obtained and revision of the final document.

Helo-Leos, José Roberto: Contributed to the formulation of the research methodology, including the organisation and implementation of the focus groups. He was in charge of the application of the category saturation process and collaborated in the identification of the tools and strategies most used by the MSMEs in the evaluation of customer service, and revision of the final document.

Andrew-Sotelo, María: Participated in the in-depth interviews with the entrepreneurs, ensuring the quality and consistency of the data collected. In addition, she helped in the interpretation of the results and in the drafting of the conclusions of the study and revision of the final document.

Yáñez-Castañeda, Verónica: She collaborated in the organisation of the complementary activities proposed for the MSMEs and in the validation of the evaluation instrument. She also supported in the drafting of the final report and in the revision of the contents to ensure its coherence and relevance and in the revision of the final document.

Availability of data and materials

One limitation was the limited availability of time on the part of the entrepreneurs from the city of Chihuahua to participate in the focus group at the facilities (Gesell chamber) of the Technological University of Chihuahua. Entrepreneurs were 100% available to provide relevant information for this research.

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Abbreviations

MSEs. Micro and small enterprises.

TSU. Higher University Technician.

UTCH. Technological University of Chihuahua.

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Knowledge management factors in companies and their association with the performance of a tourist destination

Factores de la gestión del conocimiento en las empresas y su asociación en el desempeño de un destino turístico

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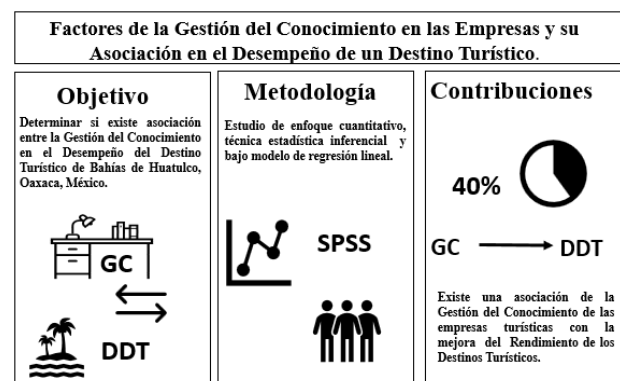
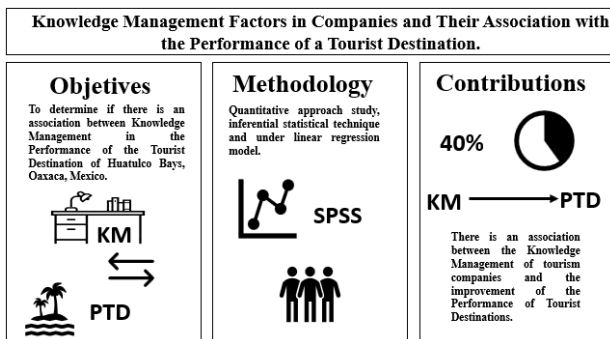


Abstract

The present study aimed to determine whether there is a significant relationship between knowledge management and the performance of the “Bahías de Huatulco” tourist destination in Oaxaca, Mexico. A quantitative, correlational research approach was used, and the hypothesis was tested using inferential statistics through linear regression via SPSS software. The analysis revealed that knowledge management significantly impacts destination performance ($p < 0.05$), explaining 40% of the variability, thus confirming the research hypothesis.

Resumen

La presente investigación consistió en determinar si existe una relación significativa entre la gestión del conocimiento y el desempeño del destino turístico de Bahías de Huatulco, Oaxaca, México. El método utilizado fue con base en el enfoque de la investigación cuantitativa con un alcance correlacional, y para la aceptación o rechazo de la hipótesis se utilizó la Estadística Inferencial bajo el modelo de la Regresión Lineal usando el software SPSS. El análisis mostró que la gestión del conocimiento impacta significativamente el desempeño del destino turístico ($p < 0.05$), con un 40% de variabilidad explicada, confirmando la hipótesis de trabajo.



Knowledge Management, Tourist Destination Performance, Tourism

Gestión del conocimiento, Desempeño, Destino Turístico, Turismo

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Introduction

Knowledge management (KM) is a crucial process that involves the creation, storage, distribution and application of knowledge within an organisation to improve its performance and competitiveness. In the tourism sector, characterised by intense competition and rapid technological evolution, knowledge management becomes even more essential. An organisation's ability to effectively manage its knowledge can determine its success in a globalised and highly competitive environment (Anand et al., 2023; Benedek et al., 2023).

Problem

Knowledge creation refers to the generation of new knowledge and innovative solutions within an organisation. In the tourism sector, this capability is critical to differentiate in the marketplace and to offer unique products and services that meet changing customer expectations. Benedek et al. (2023) highlight that tourism companies that invest in knowledge creation can develop personalised customer experiences, improving customer satisfaction and loyalty.

Knowledge storage involves the documentation and preservation of information and best practices within the organisation. This process ensures that valuable knowledge is not lost, even with the high staff turnover that characterises the tourism sector. Anand et al. (2023) point out that proper storage of knowledge enables operational continuity and informed decision-making, thus improving organisational efficiency and effectiveness.

While effective knowledge sharing fosters collaboration and communication within the organisation. This process is essential for the continuous training of employees and to ensure that everyone is aware of the latest trends and techniques in the tourism sector. Zhang et al. (2022) stress that knowledge sharing facilitates an organisational culture of continuous learning and improvement, which is crucial for maintaining competitiveness.

The application of acquired knowledge in day-to-day operations leads to improved service quality, reduced costs and increased operational efficiency. Tourism businesses that are able to effectively apply their knowledge can make more informed strategic decisions and respond nimbly to market changes. Koo et al. (2022) show how the integration of smart technologies into knowledge management can significantly improve the tourist experience and provide a competitive advantage.

However, despite the obvious benefits, the implementation of knowledge management systems in the tourism sector faces several challenges. These include resistance to change, lack of adequate technological infrastructure and the need for an organisational culture that is conducive to knowledge sharing.

Therefore, identifying these challenges, the enabling factors, as well as providing a basis for understanding these dynamics and suggesting strategies to overcome them, is crucial for developing effective KM strategies that can be successfully adopted by tourism enterprises (Anand et al. 2023; Zhang et al. 2022).

Therefore, the following question was structured: What is the relationship between knowledge management and the performance of tourism enterprises in the tourism destination?

Objective

Competitiveness is a critical factor for success in the tourism sector, especially in a globalised and highly competitive environment. This objective focuses on how knowledge management can improve the competitiveness of tourism enterprises by enabling them to innovate, adapt to change and optimise their resources. Studies such as Benedek et al. (2023) have highlighted the importance of knowledge management in improving business competitiveness.

Similarly, Abuanzaha et al. (2022) refer that there is a connection between knowledge management and competitive performance, where knowledge generation is an asset, a strategic source that allows companies to obtain better performance.

For [Esparza et al. \(2022\)](#), knowledge management is a process on an intangible resource of the organisation, which must be accessible for its use, since it allows for improved decision-making, as well as the development of competencies and capabilities of team members.

Based on the literature reviewed and the description of the problem of knowledge management and its association with the performance of tourism destinations (DDT), the research objective was proposed to determine whether there is a relationship between knowledge management and the performance of the tourism destination of Bahías de Huatulco, Oaxac, Mexico, in order to determine its association for its strengthening.

Therefore, the working hypotheses were:

Hi: Knowledge management in service companies impacts on the performance of companies in the tourist destination of Bahías de Huatulco.

Ho: Knowledge management in service companies does not have an impact on the performance of companies in the tourist destination of Huatulco Bays.

Theoretical foundation

The relationship between knowledge management and firm performance in tourism destinations can be analysed from different theoretical perspectives.

According to the Resource-Based Theory (RBT), knowledge management is linked to the strategic results of organisations, in a relationship that emphasises the role of physical and intangible resources in determining the competitiveness of an organisation; according to this theory, tourism companies must effectively manage their resources to maintain their competitive advantage ([Barney, 1991](#); [Anand et al., 2023](#)).

On the other hand, Knowledge-Based Theory (KBT) postulates that an organisation's competitive advantage comes from its distinctive knowledge assets and its ability to effectively use and share these assets within the organisation ([Grant, 1996](#); [Benedek et al., 2023](#)).

Furthermore, the Dynamic Capabilities Theory highlights the importance of a firm's ability to continuously learn, adapt and innovate in order to remain competitive. In the tourism context, this implies the ability to integrate new technologies and KM practices to improve customer experience and operational efficiency ([Teece et al., 1997](#); [Zhang et al., 2022](#)).

Additionally, [Kiseli and Senaji \(2016\)](#), consider that firms perform well and create value, when they implement strategies that exploit their internal resources and capabilities; where knowledge management (acquiring, converting and applying existing and new knowledge); enables the organisation to remain competitive in the marketplace.

Also, in the analysis of Institutional Theory, the role of external factors, such as business rules, industry policies and quality procedures, in shaping an organisation's competitiveness can be highlighted. This theory is relevant for understanding how tourism industry regulations and standards influence the implementation of QA practices ([DiMaggio & Powell, 1983](#); [Benedek et al., 2023](#)).

Having mentioned the different theories on the KM variable and its influence on performance, we first discuss the conceptualisation of the KM variable, which is described as a process of acquisition, transfer and application of knowledge, between the organisation and individuals, which helps to solve problems, make decisions, enabling the organisation to achieve high productivity and competitiveness ([Meihami & Meihami, 2013](#)).

Additionally, knowledge management is understood as the optimisation of knowledge seeking to obtain better performance in the organisation, advantage over competitors and profitability, all this making use of specific methods ([Farooq, 2019](#)).

In particular, [Mota et al. \(2020\)](#), state that knowledge management within a hotel involves the development of a plan focused and oriented to the management of the flow of knowledge in the company as part of an asset; where technological and non-technological infrastructure, internal and external knowledge is considered, in order to generate the exchange of knowledge and achieve the maintenance of these practices.

According to Yadav et al. (2020), knowledge management is the way to take advantage of past learning in the present and future with the intention of becoming a more effective organisation. Knowledge management seeks to constitute and put into practice the accumulations of knowledge generated (Obeso et al., 2020).

According to Zoogah et al. (2020) knowledge management refers to the constant process of reviewing knowledge to meet needs that arise in the organisation, as well as to detect opportunities in the environment.

At the same time, within knowledge management, smart technologies, such as augmented reality, the Internet of Things (IoT) and the use of big data, are transforming the way tourism companies manage knowledge. These technologies facilitate the collection, analysis and application of large volumes of data, improving decision-making and personalisation of services. Zhang et al. (2022) demonstrate that the implementation of smart technologies can significantly improve the tourist experience, increase tourist satisfaction and loyalty, and provide businesses with a competitive advantage.

On the other hand, to understand the performance variable of tourism destinations, it is necessary to make a conceptual reflection on competitiveness. For Nunes et al. (2017), the competitiveness of the tourism sector refers to the capacity that prevails in the market where physical and human resources generate benefits in favour of a country's economy.

Hafiz and Izzat (2019), refer that the competitiveness of tourism destinations involves the ability to attract visitors and income by offering unforgettable stays, while at the same time generating economic dividends for the benefit of the inhabitants of the tourist destination by taking care of natural assets for the benefit of future generations.

For Teixeira and Ferreira (2019), the competitiveness of a tourist destination is achieved when it offers comparative and competitive advantages. The former are the result of natural conditions (climate, flora, landscapes, etc.) and the latter are generated by the physical infrastructure generated by human resources and governmental lines.

The competitiveness of tourism destinations refers to the capacity of the site to satisfy the needs of visitors through products or services, surpassing other sites that also offer similar aspects and are considered valuable by visitors (Honore et al., 2023).

Complementarily, some empirical studies show a significant relationship between the variables knowledge management and performance. Meihami and Meihami (2013), for their part, conducted a study of manufacturing companies located in industrial areas, in which they found a direct correlation between knowledge management and organisational performance, finding that the Pearson correlation coefficient between the variables was equal to 78%.

Similarly, Kiseli and Senaji (2016), in a study applied to hotel managers in Nairobi, supported by SPSS 21 software, and using linear regression analysis, found the knowledge management process (Beta= .873) to be highly significant in its effect on the competitive advantage of five-star hotels.

In the same vein, Esparza et al. (2022), when analysing hotel and restaurant SMEs, related to meeting tourism, using the statistical technique of structural equations with the support of SMART PLS software to test the causal relationships between knowledge management and business competitiveness found a positive and significant relationship ($\beta=0.577$).

Similarly, Abuanzaha et al. (2022), analysed public higher education institutions in Jordan, using questionnaires and using a PLS SEM approach, inquired about the effect of knowledge management on competitive performance, however, they found a non-significant effect ($\beta = 0.060$, $t = 0.809$, $p < 0.419$).

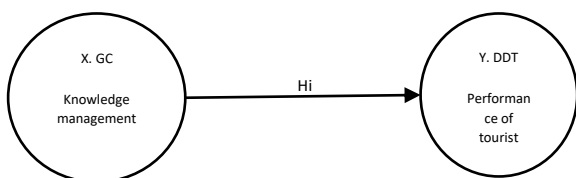
Based on the analysis, knowledge management can be considered as an essential component to improve the competitiveness and performance of tourism companies in a dynamic and globalised environment.

Thus, integrating relevant economic and management theories, together with the use of smart technologies, can provide a solid basis for developing effective KM strategies. Addressing the challenges and leveraging the enablers in the implementation of these practices will enable tourism businesses to stay ahead of the curve and deliver exceptional customer experiences. Based on the above, the following theoretical model was presented (Figure 1).

Box 1

Figure 1

Theoretical model of the research



$$Y_o = \beta_o + \beta_1 X_1 + e_i$$

Source: Own elaboration

Methodology

The research design was quantitative with a correlational scope on the variable of knowledge management and its association with the performance of tourism destinations. The data collection technique was non-experimental, as the study subjects were not manipulated. For the validation of the research hypotheses, inferential statistics were used by means of the Linear Regression parametric model using SPSS version 25 software, since the data presented a normality greater than $p > 0.05$. For the reliability analysis of the knowledge management variable and for the destination performance variable, Cronbach's Alpha was used. This method is used to assess the internal consistency of a set of items in an instrument, ensuring that the questions consistently measure the same construct.

For the knowledge management variable, the analysis included 19 items (GCO1 to GCO19), so the Cronbach's Alpha value obtained was above 0.80, indicating high reliability. This shows internal consistency, which validates the instrument used for its measurement. For the reliability of the destination performance variable, seven items (DDT1 to DDT7) were included in the data collection instrument. Thus, the analysis reveals that Cronbach's Alpha for this scale is above 0.80, indicating a high level of reliability.

The sample consisted of 132 study subjects and was composed of tourism service providers from the Bahías de Huatulco, Oaxaca, Mexico; which was representative. Based on Mercado's (2008) literature, it was determined that an adequate size was maintained to avoid errors derived from the heterogeneity of the information.

Results

A Cronbach's Alpha above 0.70 is generally considered acceptable, and values above 0.80 are interpreted as evidence that the set of items has a strong correlation and coherently measures the construct in question (Table 1):

Box 2

Table 1

Cronbach's Alpha for each construct

Dimension	Cronbach's Alpha
Knowledge Management	0.894
Tourism Destination Performance	0.909

Source: Own elaboration

Analysis of results

The relationship between the variables knowledge management (independent variable) and tourism destination performance (dependent variable) has been evaluated in order to determine whether there is a statistically significant association between these two variables, i.e. whether effective knowledge management in tourism companies has a positive impact on the performance of a tourism destination.

Based on the coefficient of determination (R^2): it is indicated that the variability in the performance of the tourism destination is explained by knowledge management. This indicates that 40% of the variability in destination performance can be attributed to how firms manage their knowledge. In addition, a t-value of 6.790 was obtained which is greater than 2.54 which means 99% confidence. With the ANOVA test it is determined that the regression is statistically significant, in which the p-value is less than 0.50 so the research hypothesis is accepted (Table 2).

Box 3**Table 2**

Correlation table

Dimension	V- Beta	V- "t"	Sig.	Res.
GC → DDT	0.401***	6.790	.000	Accepted

*Source: Own elaboration***Conclusion**

Based on the results obtained and having answered the research question, it can be concluded that knowledge management is an important factor in the performance of tourist destinations.

This is derived from the results of the linear regression analysis which show that knowledge management has a positive and significant impact on the performance of the tourism destination, with a strong association between the two variables. Once obtained a p-value of less than 0.05 in the ANOVA test thus confirming that the association is statistically significant.

In sum, the coefficient of determination is positive and significant, indicating that an improvement in knowledge management has a direct positive impact on the performance of the tourism destination.

The above results are in the same direction as those presented in the research of [Meihami and Meihami \(2013\)](#), who found a correlation between KM and performance, as well as the results found by [Kiseli and Senaji \(2016\)](#), in which they found a significant effect of KM and competitive advantage in five-star hotels. And in the same direction as [Esparza et al. \(2022\)](#), in testing the causal relationships between knowledge management and business competitiveness.

Additionally, these findings are aligned with the studies of [Benedek et al. \(2023\)](#), who highlight that knowledge management is key to improving the competitiveness and sustainability of tourism enterprises, as it facilitates innovation and adaptability in dynamic environments. Likewise, [Anand et al. \(2023\)](#) underline the importance of knowledge management to improve decision-making and operational efficiency within the sector.

This refers that better knowledge management within tourism enterprises contributes to improved performance of tourism destinations; it also contributes to the literature, which proposes that enterprises that manage to effectively implement knowledge management strategies not only improve their individual performance, but also contribute significantly to the success and competitiveness of tourism destinations globally ([Zhang et al., 2022](#)).

Declarations**Conflicts of Interest**

The authors declare that they have no conflicts of interest. There are no personal relationships that could have influenced what is reported in the article. The funders had no role in the design, collection, analysis or interpretation of results.

Authors' Contribution

All authors contributed to the conception and design of the study.

Research, formal analysis, methodology, writing and review [*OEHP*].

Conceptualisation, supervision and project management [*ADY*].

Conceptualisation, preparation of original draft and editing [*CRG*].

All authors read and approved the final manuscript.

Availability of data and materials

Data for this research are available according to the sources consulted.

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Diagnosis to determine the degree of indebtedness of households in Ciudad Obregón, Sonora

Diagnóstico para determinar el grado de endeudamiento de los hogares en Ciudad Obregón, Sonora

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Abstract

This research addresses a diagnosis of the degree of indebtedness of families settled in Ciudad Obregón, Sonora, in order to compare the level obtained regarding the management of their economic resources and visualize the effect caused according to the degree in which they are. This study was developed under the quantitative approach, with a descriptive scope. The design is field, non-experimental, cross-sectional. With the data obtained from the applied instrument, the debt-to-income ratio (DTI) of the households was calculated, resulting in a ratio of 0.15, which, according to the reference parameter, indicates that households in Cd. Obregón have a healthy DTI. Therefore, it can be concluded that families efficiently manage their resources and do not take the financial risk that a debt incurs, but neither do they take the benefit of assuming a debt responsibly.

Objetivo	Methodology	Contribución
To prepare a diagnosis of the level of indebtedness of families living in Ciudad Obregón, Sonora, in order to compare the level obtained in relation to the management of their economic resources and visualize the effect caused according to the level in which they are found.	The research was carried out using a quantitative approach, with a descriptive scope. The design is field-based, non-experimental, describing and analyzing the variables with their natural results, with a cross-sectional approach.	Valuable information for academic observation in the area of economics and finance as it provides a general overview of the levels of income obtained and the composition of debt in households in Ciudad Obregón, Sonora. It provides the financial perspective on the types of credit most used and the debt behavior in households.

Resumen

La presente investigación aborda un diagnóstico sobre el grado de endeudamiento de las familias asentadas en Ciudad Obregón, Sonora, con la finalidad de comparar el nivel obtenido respecto a la administración de sus recursos económicos y visualizar el efecto causado según el grado en que se encuentre. Dicho estudio se elaboró bajo el enfoque cuantitativo, con alcance descriptivo. El diseño es de campo, no experimental, de corte transeccional. Con los datos obtenidos del instrumento aplicado se calculó la ratio deuda-ingresos (DTI, por sus siglas en inglés) de los hogares, resultando una ratio de 0.15, el cual, de acuerdo al parámetro de referencia indica que los hogares en Cd. Obregón tienen un DTI saludable. Por lo que, se puede concluir que las familias administran de manera eficiente sus recursos y no toman el riesgo financiero que contrae una deuda, pero, tampoco el beneficio al asumir una deuda de manera responsable.

Objetivo	Metodología	Contribución
Elaborar un diagnóstico sobre el grado de endeudamiento de las familias asentadas en Ciudad Obregón, Sonora, con la finalidad de comparar el nivel obtenido respecto a la administración de sus recursos económicos y visualizar el efecto causado según el grado en que se encuentre.	La investigación se elaboró bajo el enfoque cuantitativo, con alcance descriptivo. El diseño es de campo, no experimental describiendo y analizando las variables con sus resultados naturales, de corte transeccional	Información valiosa para observación académica en el área de economía y finanzas ya que aporta una visión general sobre los niveles de ingresos obtenidos y la composición de la deuda en los hogares de Ciudad Obregón, Son. Al sector financiero le proporciona una perspectiva de análisis sobre los tipos de créditos más utilizados y el comportamiento de endeudamiento en los hogares.

Household, Income, Debt

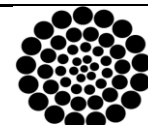
Hogar, Ingresos, Endeudamiento

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Introduction

Background

Family is defined as a ‘Group of people linked by marriage, kinship, cohabitation or affinity’ according to the Royal Spanish Academy ([RAE], 2023, definition 1); however, there are people who live together and may not be from the same genes, these groupings are called households.

The National Institute of Statistics and Geography ([INEGI], 2020) defines households as a group of people who may or may not be family members and live in the same dwelling. The difference then lies in the blood ties of the family who may also live anywhere, whereas in the household they strive to live in the same house sharing expenses and contributing to the income. These two concepts can be unified by forming a family household in which some members are related to the head of the family, living in the same dwelling and sharing living expenses.

In order for the household members to develop their lives in the best possible conditions, it is essential to have a planned household economy that allows for the correct management of income and expenditure. The planning of the household economy does not differ significantly from that of a company in both cases, the objective is the same: to efficiently manage capital to cover the expenses derived from daily needs and activity (BBVA, n.d.). In order to make the best decisions, financial tools are a requirement to be used, and the budget is one of them, in which a planning of income, savings, investments and expenses is projected for a certain period of time, considering the source of income and financing (indebtedness).

According to the main gateway to statistical information collected, systematised, produced and published by the Economic Commission for Latin America and the Caribbean ([CEPASTAL], n.d.) ‘Household income is the sum of the amounts received by its members as salaried or independent workers, plus the amounts received from retirement, pensions and social transfers or from other households plus the amounts received from interest, dividends and other property income’.

For his part, Maiterst (2020) mentions that indebtedness is the term given to the acquisition of credit or credits to be paid in certain amounts in determined periods, whereby a part of the income is kept committed to pay it according to the obligations acquired with the third party.

For the purposes of this research, at the time of writing, there are empirical studies and documents that are related to resource management and families, one of them is the Strengthening of Financial and Administrative Education in Latacunga Families, research conducted by Montero and Gallardo (2022), which was developed to carry out a project where families in a city in Ecuador were taught about finances, one of its objectives being to determine financial indicators in each family to use them as premises that allow them to identify their levels of economic solvency.

The second document consulted is called Student's Handbook. Family Economy developed by the International Labour Organisation (2020), which serves as a financial education tool for families, where in each chapter concepts, cases, exercises and templates are presented for the elaboration of family financial plans considering savings, budgeting, indebtedness and risk management. In addition to the thesis called Financial Plan for Families by Gómez (2016), whose objective focuses on families learning to effectively manage their income and maintain control over debts.

Problem statement

The National Survey on Household Finances ([ENFIH], 2019), reveals among its main findings that 66.5% of households live up to date with their income and expenses, while 20.7% do not have sufficient income for their basic needs, and only 12.8% have savings as part of their financial planning. More than half of the households have debts, representing 56.9% of the population, in total 20.9 million households, divided into mortgage debt (11.6%) and non-mortgage debt (53.8%); mortgage debt represents 15% of monthly income and non-mortgage debt represents 17%.

According to these results, it is assumed that there are two aspects, one is that families truly cannot afford to obtain more income to cover their needs, and the other is that they mismanage their income, quickly using it up and resorting to loans incorrectly; some even go beyond their means by acquiring more things than their salary allows with credit, and without realising they have used it for everything, they end up asking for a new loan, repeating the same steps, generating a cycle of over-indebtedness. Ramos (2021) indicates that this happens because the debtor overestimates their income due to the inability to manage their expenses or give in to the temptations of consumption and advertising.

Manjón and Cremades (2020) mention that getting into debt immoderately brings with it economic and financial problems in the household, which cause shortages of food, services and other inputs, by directing most of their income to pay debts, and even, in the absence of more income, they go to the extreme of selling personal property. This leads to family conflicts, stress, health problems and unproductiveness, keeping family members in a state of constant survival. Likewise, over-indebtedness negatively affects a person's credit history, which can make it difficult to access loans and credit in the future according to Garrido (2023), this being one of the most logical consequences of non-payment and legal action taken by creditors towards the debtor.

Research question

What is the relationship between the degree of indebtedness of households in the municipal capital of an entity and the management of their resources?

Objective

To carry out a diagnosis of the degree of indebtedness of households in Ciudad Obregón, Sonora, in order to compare the level obtained with respect to the administration of their economic resources and to visualise the effect caused according to the degree of indebtedness.

Justification

The present research is considered pertinent, since carrying out its objective will benefit researchers and the financial sector, providing them with a perspective of analysis on the behaviour of indebtedness and the administration of resources maintained by families settled in the municipal capital of an entity.

Methodology

The research was carried out using a quantitative approach, with a descriptive scope. The design is field-based, as data collection was carried out on the delimited subjects and no variable or condition was manipulated, describing and analysing the variables with their natural results, therefore, it is non-experimental with a transectional cut, as it was carried out over a certain period of time,

The instrument developed and used for data collection was divided into two sections, I. Household income and II. Indebtedness. The questions were designed in numerical sequences, where the respondent selects a single range corresponding to the question according to the options provided.

The ranges used in the questionnaire sections are in scale order; and the numerical series method defined by Anderson et al, (2019) as a series of values used to analyse patterns and trends in the data. Applying this method, the options provided in the questionnaire are adjusted according to the data retrieved concerning income, expenditure and expenses collected from inhabitants of the State of Sonora.

Within this sequence, the subject selects one of the options closest to the monthly monetary value, which is requested according to the section in which he/she finds him/herself. In such a way that, at the end, we obtain the income, expenses and debts incurred by the families of the surveyed subjects, which allows us to calculate the debt-income ratio.

The following Table identifies the units of measurement for each of the variables:

Box

Table 1

Operationalisation of variables

Variable	Definition	Unit of measurement
Household Income	The sum of the total financial resources that a household receives in a certain period of time, through work, business, transfers, investments, from the government, or others.	Monthly income between less than \$5,000 and more than \$80,000. Items 1 and 2.
Household Indebtedness	The sum of financial obligations that the household assumes in order to finance in a certain period, needs, expenses, investments, or others, being these obligations obtained by credits, loans or debts.	Educational, mortgage, auto debt less than \$5,000 and up to more than \$70,000. Item: 3-10.
Credits	A financial transaction in which a financial institution temporarily provides the use of an amount of money to a borrower, who undertakes to repay the amount within a set period of time, together with agreed interest.	Credit card debt under \$5,000 and up to more than \$100,000.
Insurance	A contract whereby an insurance company undertakes, in return for the payment of a premium, to indemnify the insured or his beneficiary for damages suffered as a result of an uncertain and fortuitous event.	ITEM 11.
Loans	A contract whereby one party delivers to the other a certain sum of money or other fungible thing, and the other party undertakes to return the sum in the same kind and quality.	Minimum monthly payment of \$500 and a maximum of \$30,500.

Note: The definitions given in the table are the author's own elaboration

The research is carried out in the state of Sonora, specifically in Ciudad Obregón, the municipal capital with 436,484 registered inhabitants, of which 221,883 are women and 214,601 are men; in other words, for every 97 men, there are 100 women in the municipality, the average age being 32 years old, and 61% are economically active from the age of 12.

From this entity, households have been selected as the subject of research, which according to the 2020 population and housing census conducted by INEGI resulted in 135,701.

To select the ideal sample for the purposes of this research, we applied the suggestions of Hernández et al (2010) on the calculation of probability samples through the simple random method for finite populations, the authors point out that this type of sample is essential in survey research designs, where the aim is to generalise the results to a population. The quality of this type of sample is that all elements of the population have the same probability of being chosen, so the sample elements will have values very close to the values of the population, since the measurements of the subset will be very precise estimates of the larger set. This precision depends on the sampling error, also called standard error.

The formula for calculating the size of a probability sample was developed by Krejcie et al. in 1970. This formula is used to calculate the appropriate sample size for a finite population with a specified level of confidence and level of precision. The formula for the probability sample size is:

$$n = (N * Z^2 * p * q) / [(N - 1) * e^2 + Z^2 * p * q] \quad (1)$$

Where:

N= 135, 701 households

Z= 1.96

p= 0.5

q= 0.5

e= 10%

$$n = (135,701 * 1.96^2 * .5 * .5) / [(135,701 - 1) * .10^2 + 1.96^2 * .5 * .5] = 95.952482 = 96$$

According to the above calculation, 96 households in Ciudad Obregón are represented by one person over 18 years of age who forms and maintains a household.

Results and discussion

In Section I: Household income, according to the information collected, 9.4% of the respondents earn less than \$5,000; 26% of the respondents have monthly household incomes ranging from \$5,000 to \$10,000, followed by 17.7% who earn between \$11,000 and \$15,000 per month; while 9.4% have incomes between \$16,000 and \$20,000. 3% between \$26,000 and \$30,000, 10.4% report incomes between \$31,000 and \$40,000; 6.3% between \$41,000 and \$50,000; 4.2% between \$51,000 and \$60,000; 0% between \$61,000 and \$79,000 and 1% more than \$80,000. According to the National Survey of Occupation and Employment (ENOE), as of the first quarter of 2023, half of the households in Mexico have an income equal to or less than \$10,320 per month. Likewise, the average income of Mexican households was \$13,854 (Luna & Gallegos, 2023).

The results obtained in section II: Family indebtedness show that 68.8% of the families do not have a mortgage loan, and the remaining 31.2% do have a mortgage loan. Regarding educational debts, 92.7% stated that they did not have any, while 7.3% said that they did. With regard to car loans, 84.4% of those surveyed do not have this type of debt, while 15.6% of families pay this type of loan.

Regarding the level of debt acquired through the use of credit cards, 33.3% mentioned not using this financial instrument, of the remaining % who do use it, 14.6% have a debt of less than \$5000; 18.8% from \$5000 to \$15,000; 8.3% between \$15,000 and \$25,000; 9.4% between \$25,000 and \$35,000; and 9.4% between \$25,000 and \$35,000. 4% between \$25,000 and \$35,000; 1% between \$35,000 and \$45,000; 0% between \$45,000 and \$55,000; 3.1% between \$55,000 and \$65,000; 3.1% between \$65,000 and \$75,000; 2.1% between \$75,000 and \$85,000; 1% between \$85,000 and \$95,000; and 5.3% over \$95,000.

These results differ from those obtained by the ENFIH (2019) in finding that 55.4% of the total value of household debt corresponds to mortgage debt, 11.5% to credit card debt and 9.3% to vehicle debt.

Based on the data collected, only 18.8% of the families surveyed have contracted health insurance, indicating that 81.3% of families do not have contracted health insurance. Continuing in the area of insurance, 4.2% do not have auto insurance, while of the remaining % that do have auto insurance, 23.4% pay less than \$500 per month for auto insurance, 42.6% pay between \$500 and \$1,500, 14.9% pay between \$1,500 and \$3,500 per month for their insurance, and another 14.9% pay more than \$55,000 per month. According to data from the 2021 National Financial Inclusion Survey (ENIF), only 21% of the Mexican population had some type of insurance, either Life (13%), Auto (10%) or Medical Expenses (6%).

In light of the data obtained, 70.8% of the families surveyed do not have any debts with friends or relatives, while 29.2% have this type of debt. Both to make ends meet and to meet an economic emergency, among the main options of the population in Mexico, is to ask for loans from family and friends, as reported by the National Survey on Financial Health (ENSAFI) presented in 2024 by INEGI and the National Commission for the Protection and Defence of Users of Financial Services (CONDUSEF), according to Juarez (2024) of the Economist. There it is revealed that, of the population over 18 years of age, 30.5% reported that during the last month (prior to the survey), they did not have enough money to cover their expenses without going into debt, and 41.6% revealed that they had borrowed from family or friends to face the difficulty.

Conclusions

With the results obtained from the applied instrument, the debt-to-income ratio (DTI) of the households was calculated by dividing the total monthly debt payments by the total monthly income, resulting in a ratio of 0.15, taking into account that a debt-to-income ratio of 0.36 or lower is considered healthy, while a ratio higher than 0.43 may indicate financial difficulties (Faster Capital, 2024), it is considered that the households in Cd. Obregón, Son. have a healthy DTI.

In the analysis of the results it is observed that most households have debt, however, this does not represent a high percentage of their income, so it can be concluded that families manage their resources efficiently and do not take the financial risk that debt entails, but neither the benefit of assuming debt responsibly.

This research generates valuable information for academic observation in the area of economics and finance as it provides an overview of the income levels and debt composition of households in Ciudad Obregón, Son, which can be used to develop financial education programmes that provide them with strategies for resource management and debt management. It provides the financial sector with an analytical perspective on the types of credit most commonly used and the debt behaviour of households.

Declarations

Conflict of interest

The authors declare that they have no conflicts of interest. They have no known competing financial interests or personal relationships that might have appeared to influence the research reported in this article.

Authors' contribution

Osuna-Marrufo Erika: Contributed to the project idea, rationale, instrument construction, data collection and processing.

Acosta-Mellado, Erika Ivett: I contributed to the methodological assessment of the entire research.

Ruíz-Perez, Roberto: I contribute to the research method and technique.

Valenzuela-Reynaga Rodolfo: I contribute to the discussion of the results.

Availability of data and materials

The instrument and the results obtained are kept by the authors in the cloud associated with their institutional e-mail addresses. The sources consulted in the references are available in electronic databases outside the institutional ones, so their availability over time cannot be assured.

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Abbreviations

BBVA Banco Bilbao Vizcaya Argentaria

CEPASTAL Statistical Database and Publications of the Economic Commission for Latin America and the Caribbean (ECLAC)

CONDUSEF National Commission for the Protection and Defence of Financial Services Users (Comisión Nacional para la Protección y Defensa de los Usuarios de Servicios Financieros)

ENSAFI National Financial Health Survey

ENIF National Financial Inclusion Survey

ENFIH National Survey of Household Finances

INEGI National Institute of Statistics and Geography

ENOE National Occupancy Survey and Employment

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Inclusive and participatory management of urban parks in Puerto Vallarta: perspectives and challenges in a tourist context

Gestión inclusiva y participativa de parques urbanos en Puerto Vallarta: perspectivas y desafíos en un contexto turístico

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Abstract

This article examines the inclusive and participatory management of urban parks in Puerto Vallarta, a rapidly growing city with a strong tourism orientation. Using a mixed-methods approach, it analyzes inequalities in access to public spaces, the lack of citizen participation, and the impact of tourism on sustainability. A bibliometric analysis and cartographic review identified the state of the art, case studies, and the distribution of parks within the city. Successful participatory management models from Mexico City and Medellín are highlighted, emphasizing the importance of involving the local community in decision-making. The findings propose a balanced management approach that integrates the needs of residents and tourists, ensuring equity and sustainability in the use of urban parks.

Goals	Methodology	Contribution
This article aims to analyze the inclusive and participatory management of urban parks in Puerto Vallarta, focusing on identifying inequalities in access to these spaces, evaluating the impact of tourism on their sustainability, and proposing management models that integrate the needs of the local community and tourists, ensuring equitable and sustainable use.	The research combines qualitative and quantitative methods. A bibliometric analysis was conducted to identify the state of the art, a cartographic review was carried out to map the parks within Puerto Vallarta's urban structure, and a field evaluation assessed their current condition. Additionally, successful participatory management cases in cities like Mexico City and Medellín were analyzed, providing insights applicable to the local context.	The study identifies key inequalities in the access and use of urban parks in Puerto Vallarta, highlighting the impact of tourism and the limited citizen participation in their management. As a contribution, it proposes a participatory management model that balances local and tourist demands, offering a practical, context-adapted framework to promote sustainability and equity in the use of urban public spaces.

Resumen

Este artículo explora la gestión inclusiva y participativa de los parques urbanos en Puerto Vallarta, ciudad en rápido crecimiento y orientada al turismo. Mediante un enfoque mixto, se analizan desigualdades en el acceso a espacios públicos, la falta de participación ciudadana y el impacto del turismo en la sostenibilidad. Un análisis bibliométrico y una revisión cartográfica identificaron el estado del arte, casos de estudio y la distribución de los parques en la ciudad. Se destacan modelos de gestión participativa exitosos en Ciudad de México y Medellín, subrayando la importancia de involucrar a la comunidad local. Los resultados proponen una gestión equilibrada que integre las necesidades de residentes y turistas, garantizando equidad y sostenibilidad en el uso de los parques.

Objetivo	Metodología	Contribución
El artículo busca analizar la gestión inclusiva y participativa de los parques urbanos en Puerto Vallarta, enfocándose en la identificación de desigualdades en el acceso a estos espacios, la evaluación del impacto del turismo en su sostenibilidad y la propuesta de modelos de gestión que integren las necesidades de la comunidad local y los turistas, garantizando un uso equitativo y sostenible.	La investigación combina métodos cualitativos y cuantitativos. Se realizó un análisis bibliométrico para identificar el estado del arte, una revisión cartográfica para mapear los parques dentro de la estructura urbana de Puerto Vallarta y una evaluación de campo sobre su estado actual. Además, se analizaron casos exitosos de gestión participativa en ciudades como Ciudad de México y Medellín, permitiendo adaptar aprendizajes a las características locales.	El estudio identifica las principales desigualdades en el acceso y uso de los parques urbanos en Puerto Vallarta, destacando el impacto del turismo y la limitada participación ciudadana en su gestión. Como aporte, propone un modelo de gestión participativa que equilibre las demandas locales y turísticas, proporcionando un marco práctico y adaptado al contexto local que promueve la sostenibilidad y la equidad en el uso de los espacios públicos urbanos.

Participation, Urban, Contexts

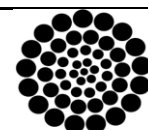
Participación, Urbano, Contextos

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Introduction

Inclusive and participatory management of urban public spaces has been recognised as a fundamental pillar for improving the quality of life in contemporary cities. Parks and gardens play a central role in promoting social cohesion, public health and environmental sustainability, especially relevant in growing cities such as Puerto Vallarta, where the coexistence of tourism and local life poses multiple challenges. This article, part of an ongoing research project, explores the prospects for inclusive and participatory park management in Puerto Vallarta, highlighting the importance of integrating citizens into decision-making processes and balancing the needs of both residents and tourists. Based on an analysis of the current state of urban parks and a review of successful models from other Latin American cities, a theoretical and methodological framework is proposed to enable a more equitable and sustainable management of these spaces.

Justification

Puerto Vallarta's urban growth has been significant in the last decade, with a population increase of 22.4% between 2010 and 2020, according to INEGI data (2021). This growth has generated pressures on urban infrastructure and public spaces, particularly in areas where tourism activity is intense. While Puerto Vallarta has a varied offer of parks and gardens, these spaces are not always equally accessible to the local population. The Ministry of Agrarian, Territorial and Urban Development (SEDATU, 2020) highlighted the unequal distribution of green areas, especially in the more peripheral areas, where inhabitants have limited access to quality parks. This context justifies the need to develop a management approach that promotes active community participation, which is considered key to ensure that parks respond to local needs and are maintained in a sustainable manner over time.

Issue

Inequality in access to public spaces and lack of citizen participation in their management have been recurrent problems in Puerto Vallarta.

On the one hand, the tourist boom has favoured the creation of attractive public spaces for visitors, especially in the city centre and the coastal zone, while in less privileged residential areas, parks are scarce or poorly maintained. In addition, decisions on the design, maintenance and use of parks were often made without the inclusion of local communities, leading to a disconnection between the population and public spaces. This not only affected the perception of the parks, but also their use and conservation, as the lack of ownership by residents contributed to a reduced sense of shared responsibility.

Another relevant challenge was the impact of tourism on the sustainability of the parks. Although tourism represented an important source of income for the city, overuse of the parks by visitors led to accelerated wear and tear on the infrastructure and increased maintenance costs, often resulting in poor service for local residents.

Objectives

The overall objective of this research was to analyse perspectives for inclusive and participatory management of urban parks in Puerto Vallarta, with a focus on equity, sustainability and citizen participation. The specific objectives were:

- To assess the current state of urban parks in Puerto Vallarta, with a focus on the equitable distribution of spaces and access for different social groups.
- To identify obstacles to citizen participation in park management, considering residents' perceptions of decision-making processes and the management of these spaces.
- To explore successful models of participatory park management in other cities in Mexico and Latin America in order to propose recommendations adapted to the Puerto Vallarta context.
- Analyse the impact of tourism on the sustainability of urban parks and propose strategies that balance the needs of residents and tourists.

Conceptual framework

The conceptual framework for this research was based on the concepts of inclusive city and participatory management of public space, as proposed by authors such as [Ostrom \(1990\)](#) and [Carr, Francis and Rivlin \(1992\)](#). These authors argued that public spaces, particularly parks and gardens, not only serve a recreational function, but are also crucial for promoting social equity and community well-being. In this sense, inclusion and citizen participation are conceived as key tools to ensure that parks are sustainable in the long term and respond to the diverse needs of the different social groups living in the city.

The concept of an inclusive city implies the creation of urban environments where all inhabitants, regardless of social class, gender or age, have equal access to public spaces and services. In the context of urban parks, this means ensuring that decisions about the design, use and maintenance of green spaces are made in a participatory manner, involving both local authorities and residents.

State of the Art

The literature on public space management has increasingly highlighted the importance of community participation in the planning and management of urban parks. According to [Wolch, Byrne and Newell \(2014\)](#), parks need to be managed in a participatory manner if they are to fulfil their role in promoting social cohesion and improving quality of life. This view has been supported by studies by [Cohen et al. \(2015\)](#), who noted that participatory management not only improves the perception of safety in parks, but also increases users' sense of ownership of the spaces.

In Latin America, the experience of cities such as Mexico City and Medellín has shown that participatory park management can generate significant benefits in terms of social cohesion, violence reduction and urban revitalisation. These case studies have served as a reference for the analysis in Puerto Vallarta, as they provide examples of how inclusive management models can be adapted to complex urban contexts, characterised by socio-economic inequality and tourism pressure.

Methods and Instruments

To carry out the research, a mixed approach was adopted, combining qualitative and quantitative methods. The following methods and instruments were used:

- Surveys of local residents: A structured survey was designed to assess the perception of the inhabitants of different areas of Puerto Vallarta on the quality, accessibility and management of the parks. Questions included both Likert-scale items and open-ended questions to capture the diversity of opinions and experiences of respondents.
- Semi-structured interviews: Interviews were conducted with key stakeholders, including local government representatives, NGOs and community leaders, to understand their perspectives on park management and citizen participation in decision-making processes.
- Direct observation: Direct observation was carried out in several urban parks in different areas of the city (downtown, hotel zone and peripheral residential areas), assessing the quality of infrastructure, the use of spaces and the dynamics of interaction between tourists and residents.
- Case study analysis: A comparative analysis of participatory management models in cities such as Mexico City and Medellín was carried out, with the objective of identifying successful practices that could be applied in Puerto Vallarta.

Results

Inequality in access to urban parks

The results obtained from the surveys and direct observation in various urban parks in Puerto Vallarta revealed a marked inequality in the distribution, quality and accessibility of these spaces.

This phenomenon is particularly evident in the differentiation between the tourist areas, located mainly in the city centre and on the coast, and the peripheral residential areas, where the majority of the local population is concentrated. In tourist areas, urban parks are attractively designed, well maintained and easily accessible. These spaces not only serve the recreational needs of visitors, but also form part of the tourism infrastructure that the city has developed to enhance the tourist experience. The parks in these areas, often equipped with modern facilities suitable for entertainment, reflect a high level of investment in terms of maintenance and services. These parks tend to be visible, well signposted and connected to the city's main thoroughfares, making them easily accessible to both tourists and residents living nearby.

In contrast, in peripheral residential areas, where a considerable part of the local population lives, green spaces are scarce and, where they do exist, they are often in a deteriorated condition. The parks located in these areas present problems ranging from a lack of adequate infrastructure to a lack of regular maintenance. This situation means that residents of these areas not only have fewer recreational options, but also face a lower quality of public spaces. In many cases, these parks lack basic facilities such as children's playgrounds, rest areas or well-maintained green spaces, limiting their use and enjoyment.

This disparity has not only physical but also social implications. Residents of peripheral areas tend to perceive a lower quality of life due to lack of access to adequate public spaces. The scarcity of well-maintained parks contributes to a sense of exclusion and marginalisation, as infrastructure investments seem to concentrate on areas that are meant to attract and serve tourism, while the needs of local inhabitants are neglected. This situation creates a divide between tourist zones and peripheral areas in terms of enjoyment of public goods.

The lack of accessibility to quality parks in peripheral residential areas directly affects the health and well-being of residents. Studies have shown that green spaces play a key role in promoting healthy lifestyles by providing places for physical activity, recreation and social interaction.

The lack of such spaces in less favoured areas can contribute to social isolation and reduced community participation, which in the long term has a negative impact on social cohesion and residents' sense of belonging.

Another relevant point is the disconnection between local residents and decision-making processes related to park management and maintenance. In many of the interviews conducted, stakeholders pointed out that decisions about the management of public spaces tend to be made without consultation or participation of local communities, which reinforces the perception that parks are not designed to meet their needs. This lack of inclusion in management processes not only generates frustration among residents, but also limits the development of a sense of shared responsibility for the use and maintenance of parks.

The research findings reveal that unequal access to urban parks in Puerto Vallarta is a significant problem that affects both the quality of life of local residents and equity in the enjoyment of public spaces. While tourist areas enjoy well-maintained and accessible parks, peripheral residential areas face a lack of adequate green spaces, limiting recreational opportunities and well-being for their inhabitants. To address this situation, it is essential that the city's public policies adopt a more inclusive approach that considers the needs of all social groups, ensuring equitable access to urban parks in all areas of the city.

Introduction to the Participation Analysis of Park Management in Puerto Vallarta

The analysis process examined citizen participation in the management of parks and green spaces in Puerto Vallarta according to the Ecology Regulation, using Sherry Arnstein's Ladder of Participation as an interpretive framework. The review identifies key competencies of the bylaw, assesses levels of citizen participation, and highlights opportunities for improved government-community collaboration.

Article

The Ladder of Participation allows a ranking of levels of inclusion in public decisions, from non-participation to delegation of power, which makes it easy to see where citizen involvement in environmental management can be increased.

The table, entitled ‘Analysis of Competencies and Gaps in Participatory Park Management in Puerto Vallarta’, organises the relevant competencies in the regulation along with the gaps in participation according to Arnstein's levels. The analysis is based on the following levels of the Ladder of Participation:

Non-Participation - The community is informed without interference in decisions.

Informational Participation - Citizens receive information, but cannot contribute to change.

Consultation - A space for opinion is provided with no guaranteed impact.

Symbolic Participation - Citizens are minimally included, with little effect.

Collaboration - Intervention in projects is allowed under municipal supervision.

Delegated Power - Control of certain decisions is transferred to the community.

Each relevant article of the bylaw is assessed against this framework to identify the current level of participation and to point out areas where citizen inclusion can be increased, encouraging more collaborative parks and green space management. The table below details the results of this analysis:

Box 1			
Table 1			
Competence and Gap Analysis of Participatory Park Management in Puerto Vallarta			
Article	Competition	Description	Shortcomings according to the Ladder of Participation
Article 56	Establishment of municipal natural protected areas	Includes municipal ecological parks as protected areas of municipal interest.	Limited consultation: Although the regulations designate natural protected areas, no direct community consultation process is specified, leaving the decision in the hands of the municipality without including the voice of local residents in decision-making.
Article 61	Protection and conservation of green areas	Promotes nurseries, wooded areas and ornamental plants in parks and gardens.	Informational participation: The community is informed about protection actions, but there is no clear mechanism for citizen involvement in the design or implementation of these green area projects.
Article 67	Environmental education	Promotes respect and maintenance of parks and green areas under municipal jurisdiction.	Symbolic participation: Although the aim is to raise public awareness, environmental education here is more oriented towards communication than participatory action, lacking programmes that actively integrate the community in environmental management.
Article 207	Urban vegetation management	Regulates the planting, maintenance, pruning, removal and transplanting of species in public spaces and parks on a technical basis.	Technical consultation without community collaboration: Vegetation management activities are carried out under technical regulations without citizen involvement, reducing the opportunity for local collaboration or volunteerism in these processes.
Article 204	Administration of vegetation management	Establishes the City Council as responsible for vegetation management in	Control without participation: Responsibility rests solely with the City Council, limiting

		public property, including parks.	transparency and not allowing the community to influence or collaborate in the management of these spaces.
Article 68	Education and environmental dissemination policies	Promotes park conservation policies through educational systems and the media.	Information without community involvement: Although there is environmental communication, the community is not included in the creation of these policies or in the evaluation of their effectiveness, resulting in a low level of participation.

Source: Own elaboration 2024.

Table 1 allows us to emphasise the flow of participation and inclusion in the management of parks in Puerto Vallarta:

1. **Clarity in the Distribution of Powers:** The table shows how the bylaws concretely assign various competencies to the City Council in relation to the management and conservation of parks and green areas, providing a regulatory framework that structures municipal responsibilities in these environmental issues.
2. **Levels of Citizen Participation:** Most of the competencies reflect an informational or consultative participation approach, where citizens have access to information on environmental actions and policies but with limited opportunities to influence final decisions. This suggests that, although the community is aware of the measures taken, their ability to directly influence them is limited.
3. **Inclusion Mechanisms:** Although there are instances of consultation and environmental education programmes, active community participation in decision-making and policy implementation is perceived as limited. Park management processes remain largely in the hands of the municipality, which may reduce active citizen collaboration.

4. **Educational and Awareness Raising Function:** Several articles highlight the importance of environmental education and awareness raising as management tools. This approach implies an effort to raise awareness, although without integrating citizens directly into the planning or implementation of park conservation policies.

5. **Protection and Conservation of Green Areas:** Provisions on the creation and maintenance of green areas support municipal green infrastructure. However, the implementation and regulation of these policies is centralised in the municipal government, without clear mechanisms that allow the community to actively participate in decision-making or direct management of these spaces.

6. **Opportunities for Community Collaboration:** Although some articles suggest possibilities for community participation in technical and maintenance activities, their role appears to be secondary, acting more in support or oversight roles than as actors with real control or influence over management decisions.

These findings indicate that, while the regulation establishes a solid framework of competences, citizen participation in park management is mainly limited to an informative or consultative level. This suggests a participatory structure in which the community is kept abreast of decisions, but not deeply or actively involved in the management of green spaces.

Lack of citizen participation in management

Analysis of the interviews conducted during the research revealed a clear lack of citizen participation in decision-making processes related to the management, design and maintenance of urban parks in Puerto Vallarta. Community leaders and other key stakeholders stated that although parks are a fundamental public good for social cohesion and community well-being, local residents are rarely consulted when decisions are made about these spaces.

One of the main findings is that decisions related to the design and management of parks are generally made by municipal authorities without effective mechanisms for citizen consultation. This unilateral process not only ignores the needs and expectations of local residents, but also generates a sense of disconnection between inhabitants and public spaces. As a result, parks do not reflect the priorities and particular characteristics of the communities that use them, undermining their value as meeting and recreation points.

Representatives of local communities indicated that this lack of inclusion in decision-making has reinforced a perception of exclusion, especially among the most vulnerable sectors of the population, who tend to live in the peripheral areas of the city. The interviews reflected that many inhabitants do not feel part of the planning and development processes of the parks, which has resulted in a lack of ownership and responsibility over these spaces. The lack of direct participation limits the possibility for residents to take ownership of the parks and actively contribute to their maintenance and care.

Furthermore, the lack of citizen participation mechanisms undermines opportunities to implement a more equitable and sustainable management model for urban parks. International studies have shown that when communities are involved in the management of public spaces, they are better maintained and more valued by users. However, in the case of Puerto Vallarta, the exclusion of citizens from these processes has contributed to parks in peripheral areas remaining in poor condition and lacking adequate services, some of which were identified in the documentation process as not having access infrastructure and not being legible to residents.

Lack of participation not only affects the quality of parks, but also has a negative impact on residents' perception of public spaces. Not feeling involved in decisions, many residents see parks as foreign spaces, which decreases their use and contributes to the deterioration of facilities. This phenomenon is particularly visible in areas where parks are not well maintained, as residents do not see the point of investing time or resources in their care if they feel they have no say in their management.

On the other hand, community leaders noted that efforts to include citizens in park decisions have been limited and ineffective. While some initiatives have attempted to integrate residents into the dialogue on urban planning, these initiatives have been sporadic and have failed to institutionalise a true culture of citizen participation. This reflects a lack of political will to establish participatory processes that empower communities and allow their voices to be heard in park management.

The lack of citizen participation in the management of Puerto Vallarta's urban parks is a significant obstacle to the development of public spaces that are truly inclusive and equitable. The disconnect between local residents and decision-making processes reinforces existing inequalities in access to and use of parks, especially in the most vulnerable areas of the city. In order to move towards more sustainable and equitable park management, it is essential that municipal authorities adopt effective mechanisms for citizen consultation and participation, allowing residents to be an active part of the design, use and care of public spaces.

Impact of tourism on park sustainability

Tourism in Puerto Vallarta, as a key economic driver for the city, has a profound impact on the sustainability of urban parks, particularly those located in tourist areas. These parks, located in areas with a high influx of visitors, are subject to intensive use, resulting in a rapid deterioration of their infrastructure. The paths, green areas and street furniture in these parks are often underutilised, resulting in the need for constant and costly maintenance. This pressure on infrastructure impacts not only tourists visiting the parks, but also local residents, who often perceive a decline in the quality of services and the state of conservation of these spaces.

Local residents, who also use these parks, are affected by tourist overexploitation, as the accelerated wear and tear of the spaces leads to a decrease in their functionality and attractiveness. As a result, residents perceive that the parks, instead of being a quality recreational and leisure space, are mainly oriented towards tourist use, with a prioritisation of investment in tourist areas over residential areas.

This creates tensions between the interests of residents and the demands of tourism, which could lead to a negative perception of the tourism sector by the local population.

The high cost of maintenance is another significant challenge arising from tourism.

The constant flow of visitors demands increased investment in the repair and renovation of parks, which increases operational costs for municipal authorities. In many cases, this priority investment in tourist areas diverts resources that could have been allocated to improving parks in peripheral or residential areas, deepening disparities in access to quality green space between different parts of the city.

Despite these challenges, urban management stakeholders recognise that tourism can also be a crucial source of revenue to improve infrastructure and ensure adequate maintenance of urban parks. Tourism generates resources through taxes, access fees and commercial activities that take place in parks, which could be reinvested in park maintenance. However, for these revenues to effectively contribute to the sustainability of parks, it is necessary to implement a balanced management that considers both the needs of residents and tourists.

In this sense, a more equitable management would imply allocating the resources generated by tourism not only to parks located in the areas with the highest tourist influx, but also to those located in residential areas that require urgent improvements. Furthermore, it would be essential to establish clear limits on the intensive use of certain parks to avoid accelerated deterioration, promoting the development of policies that better distribute the flow of visitors to other less saturated areas of the city. By rethinking the use and concepts of public space, [Carrión, F. \(2003\)](#).

Tourism represents both an opportunity and a challenge for the sustainability of urban parks in Puerto Vallarta. While the intensive use of parks in tourist areas accelerates their wear and tear and increases maintenance costs, tourism also provides a vital source of income that, if properly managed, can contribute to the improvement of these spaces.

To ensure that the benefits of tourism do not compromise equity in access to urban parks, it is necessary to develop strategies that balance tourism demands with the needs of local residents, ensuring that all Puerto Vallarta residents can enjoy quality green spaces.

Successful models of participatory management

Comparative analysis of successful models of participatory management in Mexico City and Medellín revealed that the active involvement of citizens in the management of urban parks can generate important benefits for both the sustainability of spaces and social cohesion. In these cases, participatory processes have allowed local communities to become directly involved in decision-making related to the design, use and maintenance of parks, which has strengthened the sense of ownership and responsibility towards these public spaces.

In Mexico City, for example, the implementation of participatory projects in parks such as Alameda Central and Parque Bicentenario has shown that the inclusion of citizens in the planning and management process significantly improves the perception and use of parks [Carrión, F. \(2016\)](#). Local residents, feeling involved in the creation and maintenance of these spaces, have developed a greater sense of ownership, which translates into better care of the facilities and more intensive use of the parks for community, recreational and cultural activities. This approach has also allowed for greater equity in the distribution of resources, as decisions reflect the needs and priorities of local communities.

On the other hand, Medellín has been internationally recognised for its innovative participatory public space management policies, such as the Library Parks and Green Corridors project. These initiatives have transformed previously unsafe or abandoned areas into vibrant and accessible spaces, where the community plays a central role in the daily management of the parks. In addition to improving the infrastructure and services offered in the parks, community participation has reduced perceptions of insecurity and contributed to urban revitalisation. These spaces have become symbols of social inclusion, promoting interaction and cohesion between different social groups living in the city.

These examples of success in Mexico City and Medellín provide a valuable frame of reference for the development of a participatory approach to the management of urban parks in Puerto Vallarta. Implementing similar participatory processes could address challenges identified in the city, such as unequal access to parks and lack of ownership of public spaces by local residents. Involving communities in park management would not only contribute to better conservation and use of parks, but would also foster greater spatial justice by ensuring that decisions about park design and maintenance reflect the real needs of local people.

In addition, a participatory approach in Puerto Vallarta would balance the tensions between tourism demands and the needs of local residents. By incorporating the voice of citizens in park planning, strategies could be developed to ensure that parks serve both tourists and the local community, ensuring equitable and sustainable use of parks. This would be particularly relevant in peripheral areas, where citizen participation could drive the creation or improvement of parks that are currently in poor condition, generating a positive impact on both the quality of life of residents and the social cohesion of communities.

Successful models of participatory management observed in Mexico City and Medellín show that active community involvement in the management of urban parks is key to promoting their long-term sustainability and improving the quality of life of residents. Applying these approaches in Puerto Vallarta would offer a unique opportunity to address inequalities in access to public spaces and foster a greater sense of responsibility and ownership of parks. Citizen participation would not only ensure that parks reflect the needs and desires of the community, but would also contribute to creating more inclusive, equitable and sustainable spaces. In turn, the analysis of other models applied in tourist cities such as the case of Barcelona, Spain, Crespi Vallbona, M. (2022) or models of integrated management linked to private initiative such as the experience of El Salvador is maintained,

Conclusions

The research concludes that inclusive and participatory management of urban parks in Puerto Vallarta is essential to address inequalities in access to public spaces and ensure their sustainability. The results reveal a marked difference in the quality and accessibility of parks between tourist areas and peripheral residential areas, affecting mainly the local population. In addition, a lack of effective mechanisms for citizen participation was identified, contributing to the disconnection between residents and parks.

It is highlighted that while tourism represents a challenge in terms of sustainability, it also offers an opportunity to generate the necessary resources for the maintenance of the parks. However, it is essential to balance the use of these spaces between tourists and residents, to prevent economic interests from affecting equity in access and use of the parks.

Finally, participatory management models analysed in other Latin American cities proved to be an effective strategy to improve social cohesion and ensure a more equitable and sustainable management of parks. The implementation of participatory practices in Puerto Vallarta can contribute significantly to the revitalisation of its urban parks and the strengthening of the link between the community and public spaces.

Discussion

The findings of this research raise important questions about how to balance the needs of residents and tourists in a growing city like Puerto Vallarta. Unequal access to urban parks highlights the urgency of developing public policies that promote a more equitable distribution of green spaces, especially in peripheral areas. The lack of citizen participation in the management of these spaces underlines the need to create mechanisms that actively involve the community in decision-making processes, which could improve not only the quality of parks, but also residents' perception and ownership of them.

The impact of tourism on urban parks is an issue of particular relevance in this context because, although it generates income that can be used for the maintenance of these spaces, it also implies an overexploitation that compromises their long-term sustainability. Participatory management, as observed in the cases of Mexico City and Medellín, offers a viable solution to face this challenge, allowing a more equitable use of parks and guaranteeing their conservation.

This study opens the door for future research to further explore the dynamics between tourism, sustainability and citizen participation in urban park management, and to analyse how to adapt these successful models to the particularities of Puerto Vallarta. The implementation of inclusive and participatory policies will be crucial to ensure that parks are not only recreational spaces, but also catalysts for social cohesion and urban sustainability.

Statements

Conflict of interest

The authors declare that they have no conflicts of interest. They have no known competing financial interests or personal relationships that might have appeared to influence the article reported in this paper.

Authors' contribution

The contribution of each researcher in this research was defined based on:

Reyes- González, Alberto: Contributed to the conceptualization of the research and the methodological design of the project. Participated in the initial drafting of the article and in the overall coordination of the fieldwork.

Valdez-Olmos, Fernando Daniel: Supported the literature review and the development of the theoretical framework. Contributed to the data analysis and the drafting of sections related to participatory management and inequality in access to urban parks.

Reyes-González, Andrés Enrique: Collaborated in data collection and the systematization of the results obtained through surveys and interviews. Also participated in the final review of the document.

Odetti, Jimena Vanina: Conducted semi-structured interviews with key stakeholders and participated in direct observation of urban parks. Assisted in drafting the conclusions and reviewing the final version of the article.

Availability of data and materials

All data and materials used in this research are available and can be consulted through the links and references provided by the authors.

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Abbreviations

INEGI - National Institute of Statistics and Geography.
ONGs - Non-Governmental Organisations.
SEDATU - Ministry of Agrarian, Territorial and Urban Development.

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Antecedents

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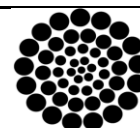
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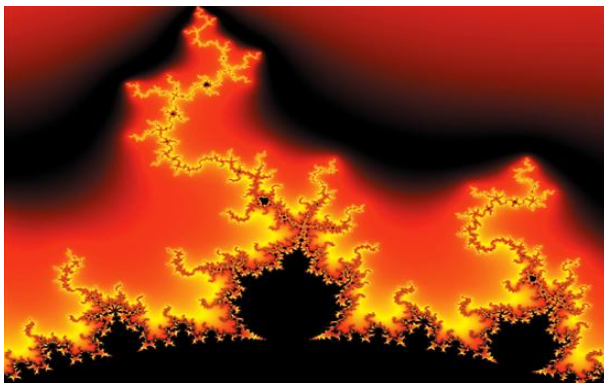


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