




Article

Positioning Axes of Sustainable Tourist Destinations: The Case of Aragón

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Abstract: The purpose of this research is to determine the optimal positioning strategies of Aragón as a sustainable tourist destination. An exploratory research is carried out based on the analysis of statistical information sources, the identification of global and multisectoral macro-trends with direct impact on the evolution of the tourist sector, and the use of the qualitative technique of the focus group. The main and secondary axes to provide a basis for the positioning strategy of the autonomous community are presented as a result.

Keywords: sustainable tourism; positioning; destination marketing; tourist intelligence

1. Introduction

The extraordinary economic boom experienced in Spain at the beginning of the 21st century had a demographic reflection in the depopulated rural areas. However, the economic crisis that broke out in 2008 had a clear demographic impact that remains. Expansion stopped and depopulation has reappeared with strong intensity. In addition, these depopulated areas show a high degree of specialization in the agricultural sector, which currently has a low capacity to generate employment, little structural diversification, and a significant impossibility to replace, in the short term, the active population close to the age of retirement.

The tourist activity is deeply rooted in the economic structure of the autonomous community of Aragón, representing an important source of income, creating employment, and serving as the backbone of the region. Tourism, and especially rural tourism, is seen as an attractive way of retaining the population in the territory [1–4], even if the reconciliation of interests and objectives of tourism and nature conservation is not that obvious [5]. Aragón is an inland community with no access to the sea, a high mountain area with small ski resorts, several regions with wide plains and mountains, numerous little rural centers dispersed all around, and the presence of the fifth Spanish city of population right at its heart: Zaragoza. In light of this reality, developing a tourism model different to the mass tourism of sun and beach so characteristic of the Spanish coastal areas becomes essential. The delay in the incorporation of Aragón as a tourist destination offers, at present, a great opportunity to introduce a model of tourism more in line with the paradigm of sustainability.

Sustainable tourism must follow three principles: Environmental sustainability (meeting the needs of the current generation without jeopardizing those of future generations), respect for the culture and livelihoods of the receiving place without the imposition of new models, and contribution to the generation of employment and income for the local population. Therefore, it is not a type of

tourism but a way of organizing and practicing tourism that equally engages tourism agents, public institutions, and consumers.

The challenge to be faced by tourism in Aragón is, therefore, creating and developing specific tourism activities and services based on the natural resources of the territory aimed to support the preservation of the landscapes and, at the same time, allow the development of an alternative economic activity with the biggest possible potential to generate employment and settlement for the population in the territory. However, to be sustainable, a tourist destination must also have the capacity to induce and attract a certain amount of demand that is able to maintain that economic activity over time. Research on tourist marketing is considered relevant to identify positioning strategies as well as the most popular products based on the sustainability principles that the autonomous community of Aragón must boost.

In 2018, there were 3,716,071 travelers who visited Aragón, with this being 1.22% more than in 2017 and representing an increase of more than 1 million compared to 2013. Overnight stays exceeded the 8 million barrier in 2018 [6]. According to these data, Aragón occupies the ninth position among the autonomous communities of Spain in the reception of tourism, even though it is not a beach destination.

Aragón has the capacity and infrastructure to support a significant growth in tourism demand. It is far from reaching the saturation level presented by other regions or areas of Spain. Hotels are the most chosen places by visitors (2,909,289), followed, with a significant difference, by campgrounds (372,749), rural houses (196,447), tourist apartments (196,060), and hostels (41,528) [6]. The indicators of tourist occupation linked to these figures are substantially lower than the national average.

The main characteristic of innovative tourism lies in having a continuous contact with the client. Just by knowing the opinion of tourists, public and private actors can design actions and programs that are both effective and efficient. Therefore, knowledge of the perceptions, attitudes, motives, and experiences of tourists is key to establishing the optimal positioning axes and configuring an offer that has an impact on the acquisition and loyalty of demand and allows greater use of the region's potential. The identification of the needs and desires of the tourist allows one to identify niche markets for the development of the positioning strategy of a destination [7]. Marketing is postulated in this context as a mechanism to achieve the strategic objectives of the destination regions [8], facilitating, with the help of its promotion mechanisms, the consolidation of positioning and effective market penetration [9] and emphasizing the set of specific attributes that represent dominant images of a destination that highlight its uniqueness [10]. The positioning process is essential for effective strategic marketing [11] because the tourist needs are increasingly wide [12].

Countries, regions, and cities compete for tourists in an increasingly aggressive way [13]. This soaring competition and pressure between destinations, the growing importance of the tourism sector in global, national, and regional economies, and the fact that the benefits of short-term tourism can be clearly analyzed, even if they are not so evident in the long term, have led to a significant increase in the production of literature on tourism competitiveness in recent years [14], which focuses on strategies for the introduction and promotion of tourism products and on market diversification.

Tourist destinations are amalgams of products that offer an integrated experience to consumers [15]. Although they are traditionally linked to very defined geographical areas, such as a city or an island, destinations can also be perceptual concepts, which tourists interpret subjectively according to the itinerary of their trip, the purpose of their visit, their educational level or past experiences [8], and the combination of functional or tangible and psychological or abstract attributes that they possess [16].

Destinations are relatively substitutable. In order to gain competitive advantages and to attract tourists, they must build images and offer unique benefits. The image of a destination is the holistic construct that derives from attitudes towards tourist attributes that are perceived from that destination [17]. Following Gunn's seminal contributions [18], the process of image formation implies, in this order, an organic image, which derives from the accumulation of mental images about the destination; an induced image, from the information obtained through different sources; and a final image, a consequence of the experience in the destination. Most tourism products are intangible

and can often only compete through images, so these are the best basis for a tourism destination management model, due to their relative simplicity, dynamism, versatility, integration capacity, and its impact on the purchase process [19]. In addition, the image of the destination directly influences the intentions of revisiting and recommending it to others [20].

Positioning is the process of study, definition, and implementation of a differentiated offer of value whose attributes provide a sustainable advantageous position in relation to competition in a competitive scenario, from the point of view of a target audience [21]. It implies developing the offer and the image so that they occupy a different and valued place in the minds of the target consumers [22]. It is a polysemic term. In the field of strategic planning, “positioning” is understood as the process of developing competitive strategies that focus on the identification of potential advantageous positions regarding competition and the creation of a unique and valuable position, composed of a different set of activities aimed at sustaining it [23]. Two apparent distant worlds, perceptual and strategic positioning, are linked, and they must not be mistaken but approached in an aligned manner.

The essence of positioning is to accept perceptions as reality and to restructure them in order to create the desired position: A battle for the mind of the consumer [24]. Positioning theory is based on three propositions. First, we live in a society bombarded daily with large amounts of information. Second, the consumer’s mind has developed a defense system against this disorder. Third, the only way to go through this system is the use of simplified and highly focused messages, whose acceptance has previously been tested with potential consumer groups.

The positioning of a tourist destination specifies the way in which customers are intended to notice, think, and feel in front of others. It refers to the individual perceptions of the client and has a high level of subjectivity, dealing with three themes: Adequate segmentation, the image and the selection of the characteristics of the destination to be emphasized [25], and its endowing with a unique identity [26]. Tourist destinations should be positioned around attributes that are significant for tourists, reflect the strengths of the destination and, finally, can be met by tour operators [27]. Thus, to ensure the success of the positioning strategy of a destination, it is imperative to identify the image and specific attributes needed to satisfy the customer [28]. The scientific literature collects numerous examples of attributes around which the various territories have built their positions [29–31].

An important objective of any target positioning strategy will be to reinforce the positive images that the target audience already has, correct negative images, or create a new image [32]. Destinations have therefore been involved in a brand building process [33]. Positioning is a dynamic process; it requires regular proactive efforts aimed at periodic reviews in order to maintain the desired brand image in a changing environment [34]. The monitoring, study, and interpretation of trends in global and sectoral environments and their influence on chance become critical: The consequences of making decisions based on incomplete, inadequate, or outdated information are severe [35].

Public policies, responsible for the planning, development, and promotion of destinations, coexist with private initiatives aimed at attracting tourists and developing goods and services to meet their needs [36] and those of their hosts [37]. The management of tourist destinations, including their commercialization, is complicated due to the complexity of the relationships between local stakeholders [38]. Marketing strategies affect the positioning of the brand and the theoretical demand of the tourist destination, but the real demand also lies in an optimal management of the offer: Price strategies, reservation channels, accessibility policy, security and protection to target level, etc. [39]. These factors have a prominent influence on market participation and cause relevant changes in the competitiveness of the destination so, finally, the fulfillment of the objectives of profitability and sustainability of tourist destinations goes through a comprehensive approach to their strategies, tactics, and operations.

The analysis of academic literature of marketing on sustainable tourism leads to the conclusion that, to boost a destination of this nature, the public actors must promote a tourism policy based on the three principles of sustainable tourism presented above. This public policy should be specified, at least, in the implementation of environmental measures for the prevention of climate change, programs

that facilitate the population's access to the resources and benefits of the tourist destination, citizen information plans about responsible tourism, fair trade development, accessibility plans, responsible economic management, programs of conservation and improvement of cultural heritage, and aids for the economic and social promotion and development of the local community. These principles shape the theoretical framework of the research presented below.

This study aims to define the strategic positioning lines that will facilitate the growth of Aragón as a sustainable tourist destination. This is a field where research opportunities are not yet exhausted: Despite the enormous documentation generated around the segmentation of tourism demand, the results are rarely translated into positioning strategies, new products, or brand customization or pricing [40]. In order to achieve this general objective, three specific previous objectives have been set: First, to establish and analyze the profile and activities of the tourist in Aragón; second, to examine the environment in order to identify trends of high impact on tourist destinations; and third, to determine the attributes of Aragón's positioning as a tourist community, describing experiences and actions that can facilitate the competitiveness of the Aragonese tourism offer.

2. Materials and Methods

It has been decided to opt for a qualitative research of exploratory nature, which combines the following methods and techniques in this order:

1. Collection and analysis of statistical information from sources of official information for the identification of the profile and activities of the tourist in Aragón. To design the optimal positioning, it is necessary to know the profile and activities of the current tourist. This requires having demographic, social, economic, and cultural information about travelers, calculating the average stay at the destination, knowing what they mainly do for their stay (resting, leisure, visits, shopping, activities, etc.), and discovering what type of activities they demand and perform (cultural visits and visits to monuments, nature hikes, visits to points of singular interest, sports practice, carry out workshops, etc.).

There are various sources of statistical information on the characteristics and evolution of the occupation in tourist accommodation for both the whole region and by provinces, main tourist regions, and the city of Zaragoza. The main sources of information are the National Statistics Institute (INE Madrid, Spain), which publishes the Hotel Occupancy Survey monthly, and the Aragonese Statistics Institute (IAEST, Aragón, Spain), which offers Excel information on incoming travelers (total, Spanish, foreigners), overnight stays (total, Spanish, foreigners), degree of occupancy by places in %, average stay in days, and staff employed. The IAEST also publishes a Tourist Situation Bulletin every month with all these data by provinces and by regions in Excel and pdf format, and an annual summary of the data on tourist occupation in the annual Basic Data of Aragón report.

Going down to a regional analysis level allows one to obtain deeper knowledge of the characteristics and motivations of tourists and discover the dominant profiles. The 132 tourism offices in Aragón have the obligation to register each of the information requests they receive in person. They collect information on people that have attended, which includes their autonomous community, country, age, form of travel, days of stay, motivation of the visit, type of information requested, type of accommodation, and how they knew about the area. The records are entered into a computer program of the General Board of Tourism of Aragón. This generates estimations based on adding data by regions, months, and years and disaggregating by profiles, origin, motivations, and behavior of travelers.

2. Analysis of the environment through tourist intelligence techniques. During the months of November and December 2018, the authors conducted, through seminars, several sessions of sharing and analyzing the main conclusions of different studies of public access on global trends of general type or sector specialization (economics, geopolitics, society, technology, etc.) published by intelligence companies such as Stratfor [41] and government organizations such as the National Intelligence Council [42]; and of the still few prospective reports on the evolution of

the tourist situation, highlighting those of the World Tourism Organization [43], the Organization for Economic Cooperation and Development [44], and the European Travel Commission [45]. A good exploration of the environment with a prospective orientation based on the technique of constructing scenarios can warn of trends or critical events before the changes have developed a discernible pattern, allowing one to adopt a reactive rather than proactive stance [46].

This allowed the identification and analysis of environmental trends with potential impact on the tourism sector in general and on the optimal positioning in particular.

3. Qualitative research technique: Focus group. During the first quarter of 2017, six focus group sessions were held with people residing in the high-density population centers closest to Aragón: Basque Country, Catalonia, Valencian Community, Madrid, and the French area of Midi Pyrenees and Aquitaine.

A discussion group or focus group is an organized and interactive discussion [47,48] with great potential as a collective and social activity [49,50], which allows one to know the various discursive positions of each participant, and to observe their ways of understanding and their own awareness about them [51]. So, it is a framework that allows one to combine reality and episteme, that is, to know the ways of perceiving (cognitively and pragmatically) through a fluid exchange of views.

The recruitment of the participants followed a specific filter that especially considered their knowledge of Aragón from the point of view of a tourist. In the focus group sessions, there were Spanish and French citizens between the ages of 25 and 65 years who, as tourists, had made stays in Aragón, provided information on the tourist offer and their concept about it, both currently and desired for the future. The size of the groups, eight people, stimulated the generation of adequate dynamics of communication between them [52] and the interaction of the reporting subjects; hence, conclusions have been established based on the analysis of their speeches. The simultaneous existence of intra-group homogeneity (similar experiences and socio-economic and cultural situations) and intra-group heterogeneity (existence of differences and contradictions that were homogenized in the consensus process) was assessed.

The sessions were held in rooms with a spy mirror of unilateral vision and were recorded in audio-video. A semi-open script was used, closing the researcher to those items of interest highlighted after the bibliographic investigation, but leaving open the interaction of the group members, with the following structure:

- Projective technique. Spontaneous evocation of the tourism offers of the communities: Andalusia, Aragón, Catalonia, Madrid, the Basque Country, and Valencia.
- Aragonese tourism demand. Motivation and reasons to visit Aragón.
- Aragonese tourism offer. Experience lived in Aragón. Positive and negative aspects.
- Perceptual memory and image of Aragón from the tourist point of view.
- Current and future identity of tourism in Aragón (real position versus aspirational).
- Positioning axis of Aragonese tourism.
- Expected concept of Aragonese tourism.
- Communication aspects of the tourist offer.

Following the recommendations of McNamara [53], the sessions advanced while generating useful information, respecting the following three basic rules: Stay focused, keep the momentum, and close issues. For the analysis of the obtained information, the description, the explanation of the reality studied, and the establishment of relationships between the phenomena were used. In all cases, a triple analysis of the discourse has been carried out as a means of converting the information into knowledge: Together with the merely literal transcription of the informants discourse, the tone in which everything has been said and gestures and emphasis of the participants have been analyzed.

3. Results

3.1. Identification of the Profile and Activities of the Tourist in Aragón

According to the INE, in 2017, a total of 3,671,259 travelers visited Aragón, without counting data on hikers, second homes, and tourist homes. With respect to the origin of the travelers, 78.53% were Spanish and the remaining 21.47% were foreigners.

As Figure 1 shows, the 2,882,906 national travelers were distributed as follows: 22.12% came from Catalonia, 18.78% from Aragón, 18.09% from Madrid, 13.04% from the Valencian Community, 7.24% from the Basque Country, 4.5% from Andalusia, 3.32% from Castilla y León, 2.66% from Navarra, and 10.25% from the rest of the autonomous communities. The tendency of Catalonia, Madrid, and Aragón itself to be the three main markets was maintained, adding to 58.99% of national tourism and 47.3% of the whole.

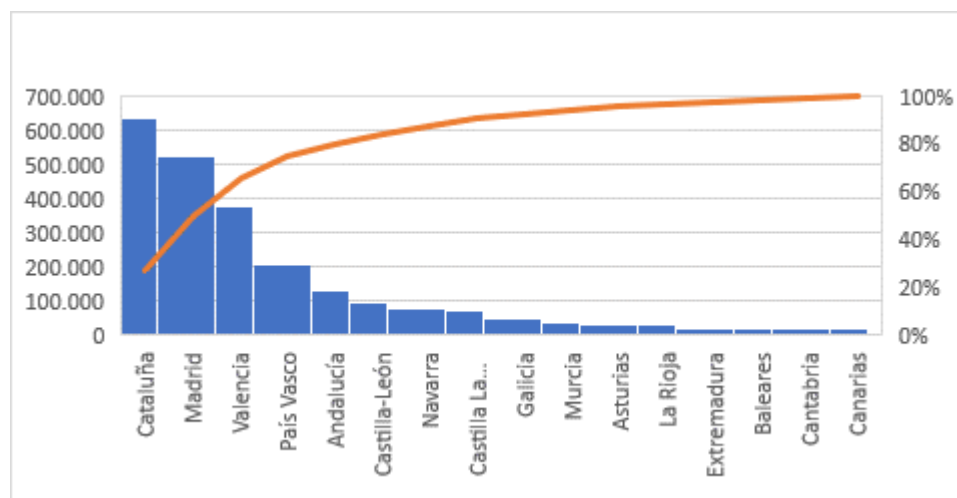


Figure 1. Origin of Spanish travelers to Aragón, 2017. Source: Own illustration, based on Reference [6].

Regarding the origin of the international tourist, as seen in Figure 2, France stands out with 27.81%, followed by the United Kingdom with 9.6%, and Germany with 7.69%.

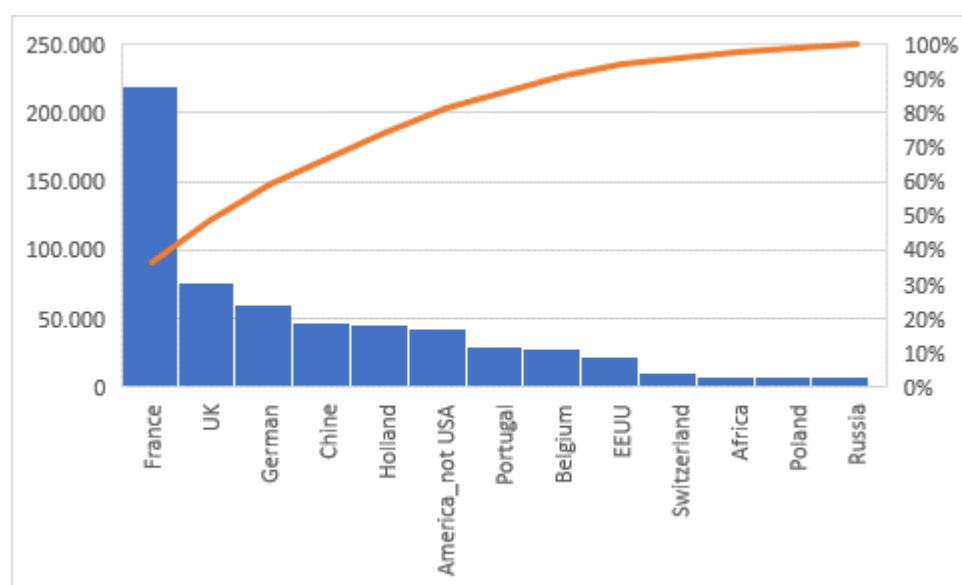


Figure 2. Origin of international travelers to Aragón, 2017. Source: Own illustration, based on Reference [6].

The mainly national character of Aragonese tourism stands out, with approximately four out of five travelers. It is very relevant to note that 54.87% of all tourism that Aragón receives comes from its Spanish border regions, together with Madrid, La Rioja, and the Basque Country; that is, more than half of the tourists inhabit less than a 4 h trip from the main Aragonese tourist destinations by road transport. As a matter of fact, participants in the focus groups noted that the main reason for travelling to Aragón was its closeness, something foreseeable considering the strategic localization of the community, set at 2–4 h from the main visitors' communities. It is also interesting to appreciate that throughout the last five years, an internationalization of Aragonese tourism has been taking place, since the growth rate of foreign tourists is higher than that of Spaniards (in 2017, a 10.1% increase compared to a 7.35% rise of nationals), there is a greater diversification of the country of origin, and an increase of the presence of extra-European tourists (15.78%, 2017).

Knowing what tourists are looking for in a destination and designing the activities that can be offered requires considering the number of days of their stay in the territory, if they are traveling through different tourist areas within Aragón during a trip, and what their budget is.

The average stay of visitors in Aragón in 2017 was 2.17 days, differently distributed by type of accommodation: 1.94 days in hotels, 3.04 in campsites, 3.07 in tourist apartments, 2.83 in rural tourism, and 3.05 in shelters. This observation was ratified by the participants in the focus groups, who argued that *“visiting Aragón means one long weekend trip, as it is close enough to go for three days but not as far as to spend one entire week”*.

The average for the period 2014–November 2018 also shows different behaviors depending on the areas visited: 2.25 days in the province of Huesca (2.31 in the Pyrenees), 1.74 days in Zaragoza (1.66 in the capital), and 1.76 in Teruel. As shown in Figure 3, the highest average daily stay corresponds to high Aragón destinations and in particular to the region of La Ribagorza with 2.63 days.

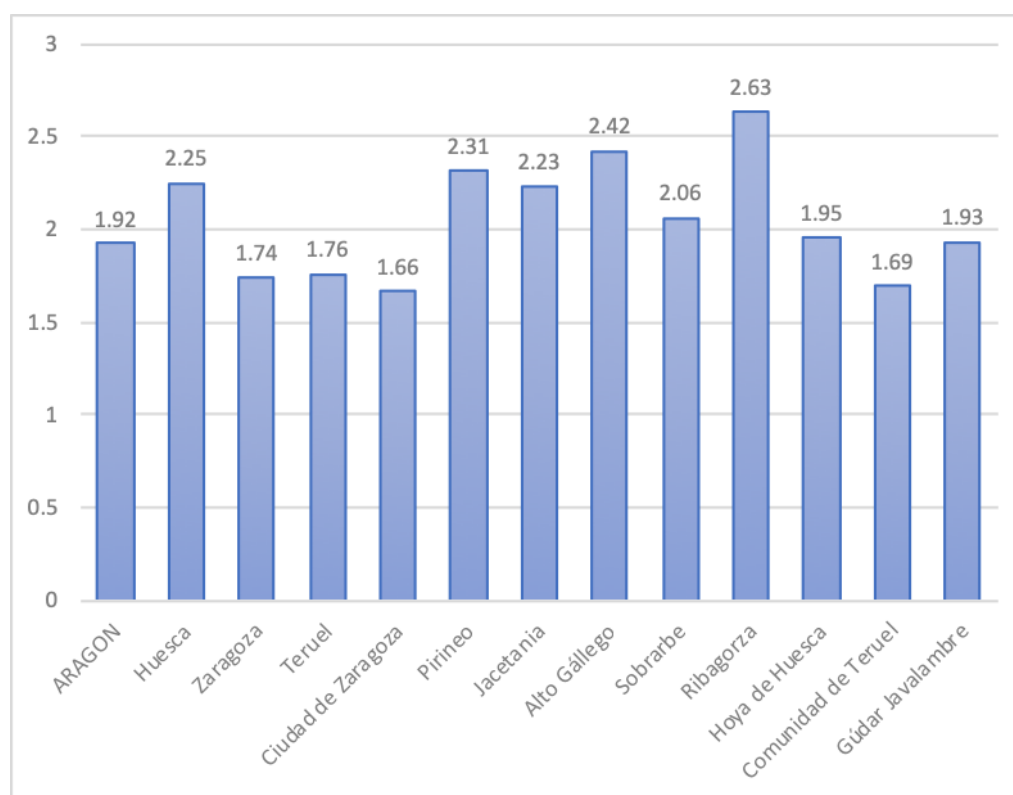


Figure 3. Average stay in hotels by tourist areas of Aragón, 2014–Nov 2018. Source: Own illustration, based on Aragonese Statistics Institute (IAEST).

The degree of occupation also shows differences by areas. Figure 4 displays that Zaragoza city has the lowest average stay, but the highest degree of hotel occupancy.

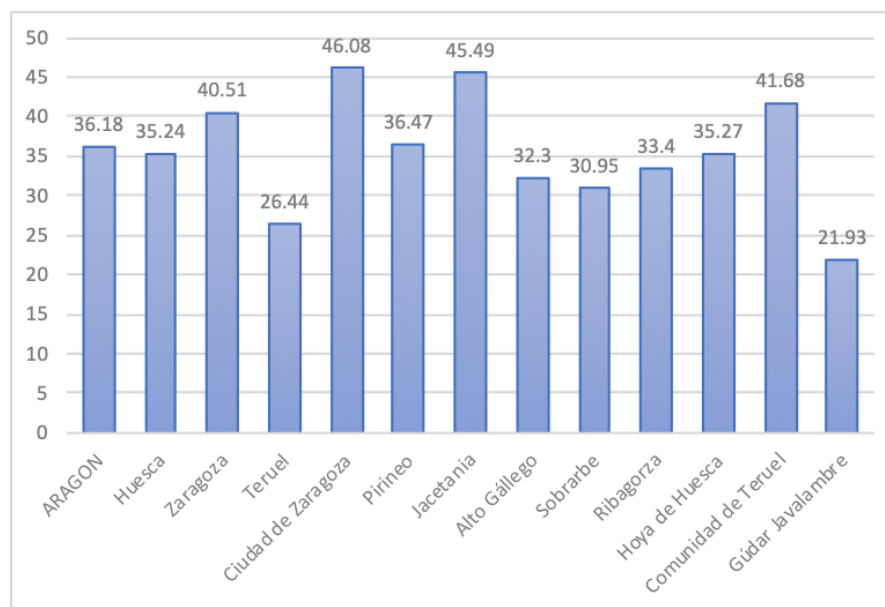


Figure 4. Average degree of occupation by tourist areas of Aragón, 2014–2018. Source: Own illustration, based on IAEST.

Average daily spending per person has a seasonal pattern, but is inversely proportional to the average length of stay (Figure 5).

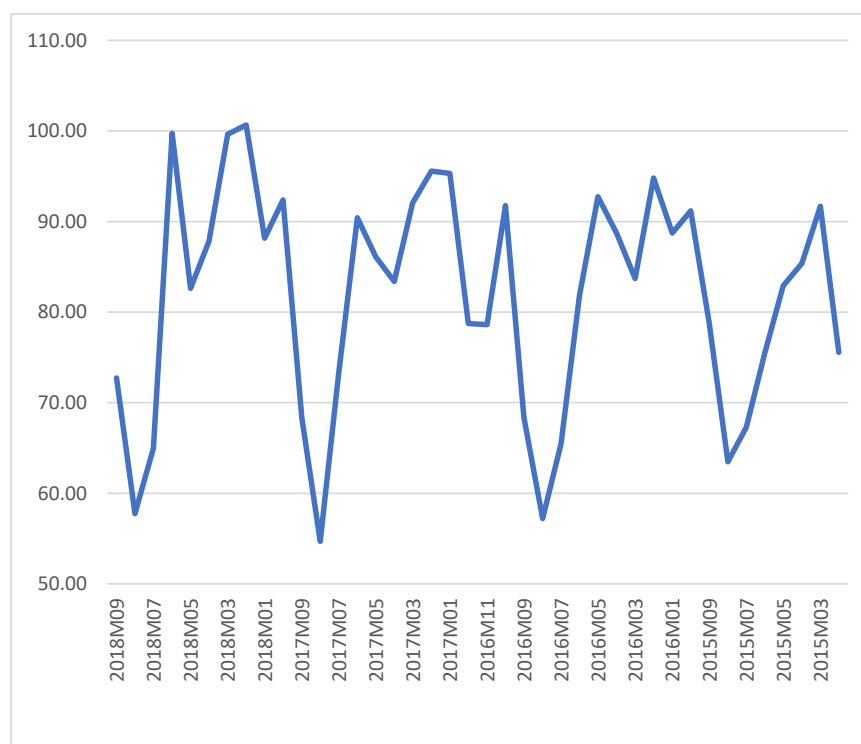


Figure 5. Average daily expenditure per person of trips to Aragón 2015–2018. Source: Own illustration, based on National Statistics Institute (INE).

As for the specific places for which information is requested, in 2017, they were in the following order: National Park of Ordesa and Monte Perdido, the valleys of Tena and Benasque, the Natural Park of Moncayo, the Matarraña, the Sierra de Guara, the Canfranc Station, the castles of Loarre and Peracense, the monasteries of San Juan de la Peña and Piedra, Zaragoza, and the towns of Jaca, Aínsa, Alquézar, Tarazona, Daroca, Sos del Rey Católico, Teruel, and Albarracín.

The National Park of Ordesa and Monte Perdido leads the ranking of demands, confirming that it is one of the biggest tourist attractions in Aragón. Its number of visitors has stabilized in recent years to a little over half a million people a year: 590,050 in 2014, 598,950 in 2015, 608,950 in 2016, and 566,950 in 2017. In 2018, the Centennial year, this figure had risen to 660,000 people. It should be considered that these figures are determined by the park being closed to saturation during the central summer days: In 1996, the visitors were 624,503 and in 2001, the maximum was reached with 657,045 people. Its evolution has been different from the rest of the national parks, since its total number of visitors has almost doubled during the last 20 years: From 8,469,074 people in 1996 to 15,439,502 in 2017, according to data from the Spanish Ministry for Ecological Transition.

The castles of Loarre and Peracense occupy a prominent place. Loarre Castle has accumulated nearly 2,000,000 visitors since 2006, when this influx began to be registered (with a significant number of foreign tourists from France, Germany, Belgium, and England), of which 30,000 correspond to the months of July and August 2018. For its part, Peracense Castle, during its 233 opening days of 2017, had 21,941 visitors, which is 14% more than the previous year. This upward dynamic is maintained during the last four years, with an increase of 67% in that period. The months of greatest arrival were the first week of August and holy week. The tourists came mainly from Zaragoza with 5277 visits, Valencia with 3810, Teruel with 3376, Madrid with 2005, and Barcelona with 1379. The percentage of foreigners remained around 2.4% of the total, coming from European countries such as France, Holland, and Germany, but also the USA and other exotic origins such as Japan, China, or Australia.

The historical urban complexes and the great monuments of Aragón follow the great natural places as tourist interests. After El Pilar and La Aljafería, the places located in the Pyrenees and the Pre-Pyrenees get the attention of the tourists, first and foremost attracted by nature. Thus, the castle of San Pedro (The Citadel) of Jaca, a pole of attraction for tourists and residents in the area who come to discover its exhibitions, theatrical visits, the deer that inhabit its moat, or the recreations that take place inside, received 90,000 visits during 2018.

It is also important to underline the interest generated by the reopening of other monuments thanks to public investment and the concerted activity of various administrations. Around 12,000 people have visited the Royal Monastery of Santa María de Sijena (Huesca) during the year since the return of the artistic works that were retained in the Museum of Lleida. The Royal Monastery of Our Lady of Rueda, near Sástago, one of the greatest exponents of the Cistercian order in Aragón together with Veruela, Piedra, and Casbas, had already been visited by 6806 people since its reopening at the end of January 2018 until September. La Cartuja de las Fuentes, close to Lanaja (Huesca), already exceeded 12,700 visits since its opening by the Provincial Council of Huesca, of which 5355 correspond to the year 2018, with tourists from 44 Spanish provinces, although they are mainly residents in Zaragoza, followed by those from Cataluña, Navarra, and Madrid.

At last, visits to the different centers of the paleontological and leisure complex Dinópolis in Teruel increased 2018 by 10.83%, reaching a figure of 192,949 visitors, which has already reached almost 3 million visitors since its opening in 2001.

A projection of the information requested in 2017 at the tourist offices informs that the main activities carried out by tourists in Aragón are, in addition to requesting information about the town to visit: Hiking trails, river walks, nature excursions (including natural bathing areas), the network of protected natural areas, heritage and monuments in the area, guided tours, museums and interpretation centers, charming villages, and gastronomy [6]. There is, therefore, a greater interest after the knowledge of a locality for nature tourism.

It is interesting to indicate that the study carried out at the request of the Chambers of Aragón in 2010 already showed, as seen in Figure 6, a balanced distribution between cultural visits, the practice of sports in nature, and establishing a contact with the rural world. That same study concluded that there were no significant differences by age segment in the type of tourist activities demanded [54].



Figure 6. Reason for the tourist visit to Aragón during Easter 2010. Source: Own illustration, based on Reference [54].

3.2. Environment Trends

The strategies to be designed and developed by public and private tourism agents must be aligned with the dominant trends in the environment to succeed, especially the ascending ones: Swim against the current and try to make reality come true to desires, and more in a global world, usually leads to failure. The methods and techniques of tourist intelligence are very useful because they allow us to obtain applicable ideas for the development of innovative products and services and to increase the presence in the markets.

The study has made it possible to obtain results as relevant as the fact that the evolution of the tourism sector is conditioned by the direct impact of the following global macro-trends of a global and multisectoral nature:

- Continuous and rapid advances in information and communication technologies (ICT): Promotion of mobility, dependence on mobile telephony, creation of new ways of communicating, increasing conversion of any social and mobile activity, interaction between machines without human intervention, appearance of virtual and augmented reality, creation of fingerprints of the actions of people, machines, and natural phenomena as data that can be exploited, etc.
- Incorporation of new regions to the consumer society such as the Chinese, Arabic, Russian, Indian, and Latin American, contributing hundreds of millions of people to the global market for mass consumer goods, including tourism.
- Globalization, diversification, interconnectivity, speed increase, and cheaper transport systems.
- Concern about the environmental impact of economic activities.
- Rise of the collaborative economy: Choice and planning of activities, means of transport, consumption of goods and services, offer of products and services by economic agents, creation of product clubs, etc.
- Variations in the social and demographic profile of consumers: Incorporation of millennials, seniors, and single or single-parent families, emergence of better-informed people with greater quality requirements, generalization of the prosumer, etc.

- Social and cultural changes in the consideration of leisure and rest: Travel as the main way to dedicate free time, demand for new experiences, narration and sharing of actions and emotions through social networks, etc.

These global macro-trends are manifested in macro-trends in tourism, among which the following stand out:

- Complete digitalization of tourism: In the design, management, and sale of the tourism product from the capture and processing of millions of data through the help of artificial intelligence throughout the value chain; and in the choice, planning, and purchase (websites and online marketplaces) of the travel package by the tourist himself and in the enjoyment (app) and communication of the travel experience (social networks) through the use of ICT.
- Cosmopolitanism and the interconnection of markets and destinations: There are no limits for a destination to be attractive for a new market and all destinations can be exotic for a consumer sector.
- Seasonally adjusted tourism: A growing number of people become travelers; more tourists want to alternate their work and travel time more frequently, even combine both; and destinations try to be attractive and profitable throughout the year, even if the intensity of the high season is decreasing in order to provide better services.
- Diversification of demand: The segmentation of the tourism market in niches both internationally and in each state is growing, with the incorporation of all demographic strata with their specific demands, the request for new tourism products and services, the search for unique experiences, and the option for multiple consumption on the same trip.
- Concern for the sustainability of tourism both by tourism agents and by consumers in three aspects: Environmental, social, and cultural. It is linked to the search for local and unique experiences.
- Emergence of intelligent tourist destinations: Creation of innovative, widely accessible spaces that use cutting-edge technology in search of sustainable development and the integration of tourists into the environment, in order to achieve a quality tourism experience. It is about combining the concepts of innovation, sustainability, accessibility, and technology around a tourist destination, in order to provide it with greater competitiveness and improve its positioning on the national and international tourist map. Spain is at the forefront with the recent publication of the standard UNE 178501: 2018 Intelligent tourist destination management systems, which lays the foundations for the design and development of these destinations.

The purpose of sustainable tourism is to develop specific tourism models for each destination area, taking into account the social, economic, and environmental implications. This way of understanding tourism is aligned with three of the above tendencies, mainly in western societies, the main consumers of tourism: Development of an ecological conscience, respect for cultural diversity, and appreciation of the exotic and the singular. In this sense, current visitors of Aragón affirmed that activities such as craft workshops performed by the local people within the cultural and rustic environment would be a very interesting tourist experience.

3.3. *Perceptions and Attitudes towards Tourism in Aragón*

The methodological approach of qualitative analysis allows one to preserve the original language of the subjects, investigate their definition of the situation, and the vision they have of their own history and the structural conditioning [55]. Therefore, although the focus groups do not allow for obtaining measurable data [56], they have been an appropriate technique since they have made it possible to know and understand, in detail, the opinions, habits, motivations, attitudes, and beliefs about the subject of study.

During the focus groups, the interaction between the participants was favored through different dynamics and games, as well as projective techniques that have allowed for the identification of the insights with which Aragonese tourism is related and the attributes and images that best symbolize

the tourist offer. Specifically, after requesting the participants to examine a series of images, they were asked to group them according to what, by group consensus, they considered reflected what Aragón could be in a better way and what they would like Aragón to say of itself.

The consensus by unanimous practice of the sample of all the localities under study, selected the images of Figure 7 as representative of the Aragonese tourist offer. In fact, the travelers that participated in the focus groups perceived Aragón as a “living nature”, and confessed that this was precisely what they were looking for when visiting it: *“a quiet natural place where you can find an authentic and wild nature surrounded by a countrifield environment in which is possible to rest and to do active sport at the same time”*.

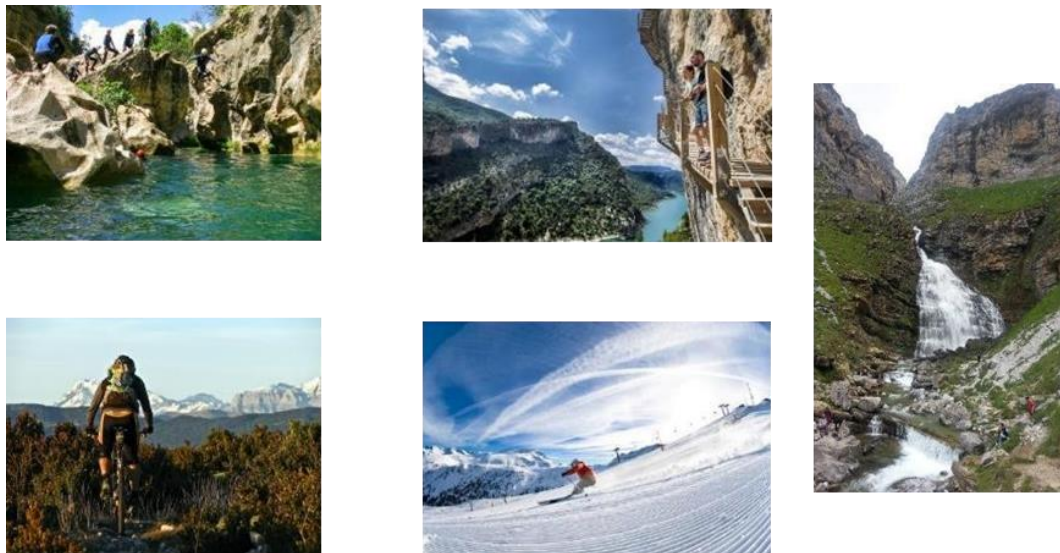


Figure 7. Representative images of the Aragonese tourism offer. Source: Own illustration.

Regarding the rest of the images presented during the sessions (Figure 8), they were considered interesting and a good complement to the tourist experience. This was expressed in terms like: *“they are places that are great and are a good complement to the trip you are doing”*; *“if you are there, then fantastic, because it is another attraction, but someone has to give you information about it.”* In this respect, these destinations could be part of the backbone of the communication that must be done to enhance tourism in Aragón and that is represented by the previous images (Figure 7).



Figure 8. Representative images of the Aragonese complementary tourist offer. Source: Own illustration.

This work with images condenses the desired characteristics of the Aragonese tourist offer: Nature, landscapes, hiking, active tourism, and snow.

Further, the analysis of the speeches highlighted that, compared to other autonomous communities, Aragón can claim a defined position and provide it with differentiation. This positioning can be articulated around a triple axis formed by the concepts of “Authentic nature”, “Active tourism”, and “Rest and disconnection”.

- The territory “Authentic Nature” is shaped by the idea of a wild nature, not spotted and alive, where the tourist can feel the emotion of a real and vivid nature through the contemplation of landscapes of unparalleled beauty. The almost universal presence of sustainability in tourism discourses runs the triple risk of banalizing the concept, of identifying it with rural tourism, and of reducing it exclusively to ecotourism or the enjoyment of nature. Nature tourism is not the same as sustainable tourism. Tourism practiced in nature is only ecotourism when it is sustainable.
- The territory “Active Tourism” refers to the wide range of activities that meet in Aragón. This is related to snow and adventure and other discovery activities for all audiences.
- The territory “Rest and disconnection” constitutes a fundamental element for a tourist who “flees from the city” and seeks authenticity and rest in a non-massified environment where he can disconnect from the daily routine. Disadvantages such as depopulation or connectivity problems in some areas can become opportunities, since many travelers seek loneliness and silence, to get a few hours or days of infocination, so they do not consider whether there is coverage or access to quality Internet to be a decisive factor for the decision to purchase that in the place of destination.

The three territories are intimately connected, so that the generic communication of Aragón’s tourism offer can be combined or treated separately depending on the market segment to which certain specific actions are directed. Lastly, as participants declared, the main reason to visit Aragón is its nature, landscapes, and protected natural parks, but the opportunity of exploring a rustic location and meeting its inhabitants and their way of life and history is an added inducement that must be promoted.

The focus group sessions conducted led to evidence of the high potential that agrotourism has to integrate these three dimensions (authenticity, action, and disconnection) and give an answer to the demands formulated in this respect. The physical characteristics and the human and economic geography of Aragón are revealed as a great strength to develop this sustainable tourist practice. Aragón can be leader in the organization of short stays or even family holidays with children or friends sharing authentic rural experiences, where rest and tranquility are compatible with discovering other ways of living in nature, producing food, enjoying the landscape, and cohabitating with the local population. The proposals on agrotourism are integrated in the family structure, they are part of the agrarian, livestock, or artisan activities, and they include didactic, entertainment, and exhibition activities related to the resources and jobs on the holding. Agrotourism also offers the possibility of supplementing many rural families’ incomes, thereby combating depopulation, one of the focuses of Aragonese tourism policy.

This generic positioning strategy must be accompanied by complementary axes that reinforce it considerably. In this sense, accommodation and catering services, historical and artistic heritage, and Aragonese folklore represent clear incentives that help to configure a global positioning from which the region will be directly benefited.

4. Discussion

The macro-trends identified with the help of the tourist intelligence together with the analysis of the opinions of the participants regarding the knowledge and perception of the Aragonese tourist offer, their motivations, and the possible reasons for their demand and potential loyalty have facilitated the identification of the axes of ideal positioning of Aragón as a tourist destination, as shown in Table 1.

Table 1. Tourism positioning axes in Aragón.

Axis	Main Axis	Secondary Axis	Tendency
Authentic nature	Nature alive, wild and preserved, not stained by the footprint of man.	<ul style="list-style-type: none"> Landscapes of extreme beauty; Lack of massification; Tranquility. 	<ul style="list-style-type: none"> Concern about the environmental impact of economic activities. Search for local and unique experiences.
Active tourism	Wide range of activities for all audiences.	<ul style="list-style-type: none"> Routes and excursions; Sports and adventure activities for everyone: hiking, canyoning, canyons, biking, canoeing, theme parks, etc.; Mudejar and Romanesque art; Aragonese folklore: festivals, traditions, commerce and crafts. 	<ul style="list-style-type: none"> Variations in the social and demographic profile of consumers. Demand for new experiences, Narration and sharing of actions and emotions through social networks. Option of multiple consumption on the same trip.
Rest and relaxation	Rest and total disconnection from the daily routine.	<ul style="list-style-type: none"> Non-existence of massification; Hotels and rural houses with resorts, spas and restaurants; Friendly, hospitable and welcoming people. 	<ul style="list-style-type: none"> Social and cultural changes in the consideration of leisure and rest: travel as the main way of spending free time.

The crossing of the results and the analysis of the information obtained during the investigation also guides the formulation of recommendations with strategic objectives and guidelines for action:

1. Align the offer with a strategy aimed at the customer, sensible to the emergence of a demand of diverse and sustainable products and services. Tourism actors must promote the specialization and differentiation with the presentation of an offer bounded to the characteristics and values of the Aragonese territory, as requested by the tourists from the focus groups. This offer must also be presented to be consumed in a short and intense period of time or as a complement in periods devoted to rest and leisure tourism. The reports of the tourist offices and the qualitative research developed agree that most tourists visiting Aragón aim to complement experiential and relax tourism.
2. Search for emerging market niches linked to experiential and sustainable tourism; especially those related to the organization of ecotourism products of a photographic nature, agritourism type “live like a countryman”, gastronomy for specialized niches (vegetarians, vegans, foodies, etc.), literary and cinematographic routes, spiritual and inner growth experiences, discovery of slowness, and getaways for groups of women.
3. Identify each tourist area with a specific type of experience tourism, promoting the preferential realization of activities of that type and the creation of an own brand for each tourist area.
4. Specialize the main towns and cities in the sustained realization of cultural activities, in order to promote transnational thematic tourism products, taking advantage of the synergies between tourism and the cultural and creative industries.
5. Promote investment in inland tourism, understanding it as a strategic economic activity for the future of the Aragonese economy and the fight against depopulation, which needs a determined public–private collaboration, the promotion of a specific line of financing and public aid, and the introduction of tax benefits, such as the granting of incentives, from local and regional administrations, to companies that make the effort to open in the middle and low season.

6. The empowerment of agrotourism highlights one of the main strategies to keep sustainability from the tourism activity of Aragón in the future, together with an effective instrument to fight against depopulation.

5. Conclusions

The method and techniques used in this research have allowed us to achieve the objective, so it is considered that similar works can be replicated in other geographical regions or administrative political units by agents interested in understanding the phenomenon of the positioning of tourist destinations.

Obtaining, processing, and analyzing relevant data and information about the environment for its conversion into intelligence that supports strategic planning and tourism decision making is essential. Therefore, the implementation of tourism intelligence systems of a territorial nature within public agencies with responsibility for tourism, and their convergence in a macrosystem encouraged by the Regional Administrations, is urgent. These territorial tourism intelligence systems must be able to equally identify risks and threats to the sector within the territory, in order to prevent them, and opportunities that guide the design of innovative products and services, the exploitation of strengths to capture loyal tourists, or the access to new markets. They should rely on two complementary pillars: Big data and competitive intelligence. Big data provide advanced tools of artificial intelligence software for the capture and massive analysis of structured and unstructured digital data from multiple sources, the results of which can be displayed in comprehensive scorecards. Intelligence offers the design and implementation of an early warning system appropriate for the needs of the organization and the peculiarities of the environment, the collection and analysis of non-digital information, and, in particular, the application of advanced human analysis techniques to evaluate and interpret the information provided by informatics with orientation towards prospective, recommendations, and support for operations.

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