

# STAKEHOLDERS' PERCEPTION OF THE IMPACTS AND RECOVERY STRATEGIES TO APPLY IN THE FACE OF A SEVERE TOURISM CRISIS: THE CASE OF COVID-19 IN SPAIN<sup>1</sup>

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## ABSTRACT

This research begins with the possibility of taking advantage of a very unusual situation, such as the first days of a dramatic pandemic with a significant impact on tourism activity, to obtain relevant information on stakeholder perceptions at that precise moment. The aim is to capture the different perceptions on the effects and possible recovery strategies for destinations, which could condition the touristic make-decision process for its design. For this, 285 professionals in the Spanish tourism sector were surveyed between 03/27/2020 and 04/30/2020. A review of other exogenous touristic crises has been done to define this survey process, identifying the primary variables, dimensions and consequences, and the recovery strategies applied. The results permit identifying preferences of the sector in an extreme crisis and identifying differences between different stakeholder types. This research offers a substantial amount of relevant information which can be very useful to compare with future

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research after recovery and to be able to conclude this kind of rush and uncertain decision-making processes with a view to a more efficient early design of recovery strategies against the exogenous crisis.

**Keywords:** COVID-19; tourism crisis; stakeholders' perceptions; tourism recovery strategies; Spain.

### **Percepción de los actores sobre los impactos y estrategias de recuperación a aplicar ante una crisis turística severa: el caso del COVID-19 en España**

#### **RESUMEN**

Esta investigación parte de la posibilidad de aprovechar una situación muy inusual, como son los primeros días de una pandemia dramática con un impacto significativo en la actividad turística, para obtener información relevante sobre las percepciones de los actores en ese preciso momento. El objetivo es captar las diferentes percepciones sobre los efectos y posibles estrategias de recuperación de los destinos, que podrían condicionar la toma de decisiones turísticas para su diseño. Para ello se encuestó a 285 profesionales del sector turístico español entre el 27/03/2020 y el 30/04/2020. Para definir este proceso de encuesta se ha realizado una revisión de otras crisis turísticas exógenas, identificando las principales variables, dimensiones y consecuencias, y las estrategias de recuperación aplicadas. Los resultados permiten identificar las preferencias del sector en una crisis extrema e identificar diferencias entre distintos tipos de actores. Esta investigación ofrece una cantidad sustancial de información relevante que puede ser muy útil para comparar con futuras investigaciones posteriores a la recuperación y poder concluir este tipo de procesos de toma de decisiones apresurados e inciertos con miras a un diseño temprano más eficiente de estrategias de recuperación frente a La crisis exógena.

**Palabras clave:** COVID-19; crisis del turismo; percepción de actores; estrategias de recuperación turística; España.

## **1. INTRODUCTION**

Tourism activity has suffered various crises from natural phenomena (tsunamis, volcanoes, etc.), large-scale fires or terrorist attacks (Faulkner, 2001; Mair, Ritchie and Walters, 2016); however, we never witnessed such a shutdown, such a sudden and global blockage. The pandemic caused by COVID-19 was of such magnitude that the forecasts done it was highly speculative. Nevertheless, what individuals do in the present is, to a certain degree, influenced by their vision of the future (Moreira, 2008).

Tourism is one of the sectors most affected by the health crisis because it limits the bases of the tourism system: the movement of people and the crowding in the spaces most used by visitors. Various research and institutional studies (Exceltur, 2020c; Gössling, Scott and Hall, 2020; OECD, 2020; UNWTO, 2020d; WTTC, 2020) had envisaged a decisive setback in 2020 and the coming years. However, there is a notable

difference between this pandemic with other crises, the spread of COVID-19 does not destroy infrastructure or physically devastate the territory, which is positive because activity can be re-launched in a shorter period.

In this context, despite the uncertainty, countries must be practical and quick in their diagnoses and strategies. Those proactive destinations that anticipate the response and coordinate the different public and private stakeholders in crisis management can increase the positive impacts and decrease the negative ones (Faulkner, 2001; Evans and Elphick, 2005; De Sausmarez, 2007; Mair *et al.*, 2016; Chan, C. S., Nozu, K., and Cheung, T. O. L., 2020).

Tourist destinations are characterised by diverse stakeholders with different interests and united by competitive and/or cooperative relationships. According to Freeman (1984), a stakeholder is any group or individual that may affect or be affected by the achievement of the organisation's goals. The literature recognises different types of stakeholders, Getz and Timur (2005) propose six categories —tourists, companies, the local community, government, special interest groups and educational institutions—, Swarbrooke (2001) comes up with five —tourists, tourist companies, host communities, governments and other sectors—, the WTO (1999) proposes four —tourism professionals, public government, the press and other media—. It is essential to involve those actors in the decision processes, especially when sustainability is one of the keys (Waligo, Clarke and Hawkins, 2015; Chan, Nozu, and Cheung, 2020). Consequently, we must know the stakeholders' perceptions as soon as possible to establish tourism recovery strategies.

The research sets out to analyse, at the beginning of a crisis, the stakeholders' perceptions about the impacts of the pandemic and the recovery strategies in Spanish tourism. It is crucial to point out that in the first months of a crisis, there is a high degree of uncertainty and few objective and reliable data for which the diagnoses that are made about the impact, such as recovery strategies, are based in many cases on the different perceptions of the stakeholders involved. Our starting hypothesis proposes that depending on the type of stakeholder, at the beginning of tourism crises, there are significant differences in the perceptions of impacts and the recovery strategies.

To this end, a survey was carried out amongst professionals in the Spanish tourism sector — public, private and researchers — during the first few weeks of the crisis in Spain. This research provides an early knowledge of the stakeholder's perception at the beginning of the lockdown when an initial idea of the impact was starting to shape public policies.

After this brief introduction, the literature on crises will be reviewed, identifying the types of crises and variables involved. Subsequently, strategies applied in previous pandemics are analysed. The third section briefly presents some reports about the effects of COVID-19 on tourist activity and how their forecasts evolved in a context of uncertainty. The methodology is described in the fourth section. The results allow us to know the impacts and preferences of the sector in the strategies and identify differences between stakeholders. These results can help compare them with ex-post research (after recovery) and to have conclusions about the decision-making processes and the design of strategies in this exogenous crisis. The discussion concludes with some reflections.

## 2. COVID-19 AND TOURISM: LITERATURE REVIEW

In their bibliometric review of research on COVID-19 and tourism, Sigala (2021) provide a framework for analysing the existing literature and identifying the major issues that emerged due to the pandemic. The four major themes are: 1) Impact of COVID-19 on tourist decision making, destination marketing, and technology adoption; 2) Future of tourism post-COVID-19: Crisis, Recovery, and Future; 3) Managing change in the tourism industry: Change, resilience, and transformation; 4) Impact of COVID-19 on the tourism and hospitality stakeholders. According to Sigala (2021), articles on the theme of crisis management and tourism recovery reflect on learnings from previous crises to discuss how tourism stakeholders can identify and address the impacts of this crisis and get ready for future challenges. Several articles have focused on how tourism stakeholders manage change due to the pandemic. However, studies so far tend to be theoretical lacking empirical evidence and insights.

The increase in the literature related to the impact of the pandemic on mobility and tourism has also been noticeable in recent months (Viana-Lora *et al.*, 2021). In this context, Viana-Lora *et al.* (2021) conclude that published studies have focused on issues such as short-distance and proximity tourism, the increase in visits to natural and rural areas and the decrease in visitors to overcrowded urban destinations. Nevertheless, a lack of studies provides empirical evidence on how these phenomena are reproduced in different territorial contexts.

From a global and general perspective, Sigala (2020) provides an overview of the type and scale of COVID-19 tourism impacts and their implications for tourism research, while Gössling *et al.* (2020) compare the effects of COVID-19 with those of previous global crises and explore how the pandemic may change tourism. In the Spanish case, Duro *et al.* (2021) propose a COVID-19 vulnerability index for the Spanish provinces. The reactions of the destinations have also been the subject of research. Palomo *et al.* (2020) analysed the recovery strategies of European regions to identify whether the pandemic has promoted a tourism model aligned with the theories of degrowth, as there is a consensus in academia that the pandemic offered the opportunity to rethink tourism in a different way towards a more sustainable model (Romagosa, 2020).

Due to the mobility constraints associated with the pandemic, some studies analyse the role of technology as an adaptation tool for tourism businesses and destinations. For example, Garibaldi and Pozzi (2020) provide evidence of the application of information technology to create tourism experiences from home (online cooking sessions, live guided tastings, virtual reality tours...). The effects of COVID-19 on the wine tourism sector have been tackled too, such as in Portugal (Kastenholz *et al.*, 2022), Italy (Seccia and Garibaldi, 2021) and Spain (Marco-Lajara *et al.*, 2021).

However, despite the wide range of research themes relating to COVID-19 and tourism, the stakeholder's perception of the effects of COVID-19 and recovery strategies has so far attracted less attention, so there is a gap in the existing literature.

### 3. TOURISM IN THE FACE OF THE CRISIS

#### 3.1. Types of crises: sensitivity and resilience

Tourism has suffered multiple crises (Jafari, 1994). Terrorist attacks, periods of political instability, economic recessions, biosecurity threats or natural disasters have caused substantial impacts on tourist destinations (Ritchie, 2004). Tourism is a very vulnerable sector to crisis (Cróand Martins, 2017).

Some crises have been generated by factors endogenous to tourism: labour conflicts (Serrano, 2014), the bankruptcy of tour operators — Thomas Cook in 2019 —, airlines — Monarch Airlines in 2017 —, or the degradation of the destination due to overexploitation (Ritchie and Jiang, 2019). In short, a local/regional crisis demonstrated the vulnerability of the tourism system.

The drift of the economy has caused other types of crises. When an economy is in a recession, it unleashes a shock in tourist demand (Okumus, Altinay and Arasli, 2005). There are two key facts (Henderson, 2007): greater sensitivity to economic recessions — with falls more remarkable than the rest of the markets — and a great capacity for recovery. There are differences if one delves into a more detailed regional analysis. In Spain, the resistance of the tourism sector compared with the rest of the sectors in the crisis of 2008 is paradigmatic.

Finally, we have crises generated by exogenous factors whereby five typologies are differentiated (Faulkner, 2001; Mair *et al.*, 2016): Wars/social conflict (the Arab springs), epidemics/pandemics, terrorist attacks, natural disasters, catastrophes generated by human beings (industrial, nuclear or large-scale fires). These crises have had disparate impacts on destinations, depending on various variables (Backer and Ritchie, 2017). Some variables are independent of the tourism management model, such as the duration or the destination's geographical location. Other variables are dependent on the tourism management model, such as (I) the existence of a prior crisis management plan, which includes an investment plan and aid for those affected (Ritchie, 2004; Evans and Elphick, 2005); (II) the integration and the degree of collaboration between the different stakeholders (Faulkner, 2001; Evans and Elphick, 2005); (III) the communication strategy followed (Mair *et al.*, 2016; Gutauskas and Valdez, 2019); (IV) or the anticipation of the response, how proactive the different public and private stakeholders can be in crisis management (Faulkner, 2001; Ritchie, 2004; Evans and Elphick, 2005; De Sausmarez, 2007).

In any case, it is important to highlight certain singularities. Firstly, the impact on tourism is more important when the crisis is generated by exogenous factors rather than causes proper to tourism or the economic system (Henderson, 2007; Orchiston, Prayagand Brown, 2016, Ritchie and Jiang, 2019). Secondly, external shocks generally affect tourism and communication infrastructures. Thirdly, it is circumscribed in a tourist space of greater or lesser dimension but limited (Xu and Grunewald, 2009) — in the second and third cases, pandemics must be excluded, which would only affect human and intangible capital, and their delimitation is more complicated —; Finally, recovery is slower, either due to the need to rebuild the tourist area or due to the perception of insecurity that tourists may have of the destination (Xu and Grunewald, 2009; Ritchie and Jiang, 2019).

The fact of the matter is that tourism has shown sensitivity to crisis and a high capacity for recovery according to the degree of resilience of the model (McKercher and Chon, 2004; De Sausmarez, 2007; Orchiston *et al.*, 2016; Sheppard and Williams, 2016; Basurto and Pennington, 2018). Resilience is understood as the return to a state of “normality”, although in the literature on tourism crises, it is usually associated with the idea of recovering a growth trend (Hall, Prayag and Amore, 2018). It would be left for the subsequent debate to ask whether, after the current COVID-19 crisis, a return to normality could be interpreted as recovering growth rates and tourist volumes in pre-COVID-19 destinations. This idea would force us to explore models whose objectives are not to recover unlimited growth in activity, which offers an opportunity to rethink the tourism model that has symptoms of unsustainability (Saarinen, 2006; Ortega *et al.*, 2020).

### 3.2. Tourism crisis: impacts and recovery strategies

Scientific literature has paid significant attention to crises due to their socioeconomic impact (Okumus *et al.*, 2005; Moreira 2008; Mair *et al.*, 2016; Ritchie and Jiang, 2019). Ritchie (2004) points out that the relevance of tourism in some economies makes it necessary to understand the crisis and the strategies to limit its impacts. International organisations also prepare reports and create tools to help the sector respond to crises generated by exogenous factors (UNWTO 2011, APEC 2006, Misrahi, Turner, Hume, and Mroszczyk, 2019).

Crises require immediate measures, and although the key variables are known, there is a high degree of uncertainty and changing situations (Backer and Ritchie, 2017) because each crisis has its singularities. Recovery strategies in previous crises focused on repairing infrastructures, diversifying tourism products, lowering prices and improving marketing. The first case was the Southeast Asian Tsunami in 2004 (UNWTO, 2005). In Thailand and the Philippines, state plans to support SMEs were implemented to fill the market gap left by sizeable foreign capital chains (Cohen, 2007; Buultjens, Ratnayake and Gnana-pala, 2015). Cooperation between public and private stakeholders was essential for the success of the recovery (APEC, 2006). An interesting case is that of Villa La Angostura (Neuquén, Argentina), 70 km from the Chilean volcano Puyehue, which after being buried by ash from the eruption in 2011, a close public-private collaboration was established to recover visits and even increase them —in 3 years overnight stays increased by 20% — (Gutauskas and Valdez, 2019).

In 2008, after the Sichuan earthquake in China, they focused on measures of positive impact: the design of more than 1,000 self-guided routes, free access to sites of cultural interest (Zhang, Li and Xiao, 2009) and a Recovery and Reconstruction plan (Yang, Wang and Chen, 2011). In 2002, the Prestige Oil tanker contaminated the north coast of Spain and opted to enhance new resources and diversify products to replace its traditional beach offer (Padín and Pardellas, 2003).

Marketing strategies are the most widely used short-term actions. It is common to design a communication campaign using the disaster itself and the reconstruction process to sell the destination — New Orleans or New York case (Chacko and Marcell 2008; Madrid, 2012), Thailand (Cohen, 2007). The increase in promotion, together with the numerous

fam-trips and press trips to Tunisia, Jordan and Egypt, helped in the tourism crisis in North Africa due to the instability generated after the social unrest of the Arab Spring in 2011 (Avraham, 2015). In many cases, communication strategies must be based on transmitting the safety value of the destination (Sönmez, Apostolopoulos and Tarlow, 1999). The 9/11 terrorist attack had a global impact by creating an aversion to the risk of travelling (Evans and Elphick, 2005) and changing the air security protocol. Other strategies are based on isolating tourists in resorts, where security can be more controlled, as in Tunisia and Egypt, which promoted the “all-inclusive” model (Salman, Tawfik, Samy and Artal-Tur, 2017).

The upshot of these crises is clear, an absence of proactive planning of the destination is recognised, and only some large companies have prepared contingency plans in the face of exceptional situations and show a greater capacity for recovery (Madrid, 2012, Mair *et al.*, 2016). The most relevant negative impacts affecting SMEs are the disappearance of many and the restructuring of the business fabric, concentrating the market on a smaller number of companies (with some exceptions: Thailand and the Philippines after the tsunami). In most cases, unconditional financing for all affected has not been as efficient as marketing campaigns (Sönmez *et al.*, 1999; Madrid, 2012; Walters and Mair, 2012; Mair *et al.*, 2016); There are better results if the aid is conditioned to a business reactivation plan with external advice, as in the crisis generated by the fires in Australia in 1998 (Cioccio and Michael, 2007).

However, the onset of a pandemic could cause more damage to global tourism than all the disasters recorded over the past decades (Page, Yeoman, Munro, Connell, and Walker, 2006). Unlike the previous cases, pandemics only inflict damage on human capital. Four pandemics have been known in the last 20 years: SARS and AVIAR FLU in 2003, INFLUENZA A-H1N1 in 2009 and MERS in 2012. In line with the analysis diagram in Figure 1, the four crises with the most considerable impact on tourism caused by a virus are reviewed.

**Figure 1**  
**ANALYSIS OF THE IMPACT OF THE LATEST CRISIS CAUSED BY A VIRUS**

<b>SARS 2003</b>	
<b>Exogenous factor</b>	Epidemic (cases detected: 8096 / deaths: 774)
<b>Time scope (duration)</b>	March 2003 - July 2003
<b>Location</b>	27 countries, the majority in the Asia Pacific (mainly China, Hong Kong, Vietnam, Singapore and Taiwan and to a lesser extent Thailand, the Philippines and Malaysia). It also affected US, Canada, Germany and France
<b>Impact on the territory</b>	There was no effect on tourism or communication infrastructures
<b>AVIAN FLU (H5N1)</b>	
<b>Exogenous factor</b>	Epidemic (cases detected: 256 / deaths: 152)
<b>Time Scope (Duration)</b>	2003 - 2006
<b>Location</b>	9 countries (Cambodia, China, Djibouti, Egypt, Indonesia, Iraq, Thailand, Turkey and Vietnam)
<b>Impact on the territory</b>	There was no effect on tourism or communication infrastructures

<b>Influenza A H1N1</b>	
<b>Exogenous factor</b>	Pandemic (Cases detected: it was estimated that it could affect, with different symptoms, between 11% - 21% of the world population / estimated deaths: between 151,700 - 575,400)
<b>Time Scope (Duration)</b>	June 2009 - August 2010
<b>Location</b>	Practically all countries were affected to different degrees
<b>Impact on the territory</b>	There was no effect on tourism or communication infrastructures
<b>MERS 2012</b>	
<b>Exogenous factor</b>	Pandemic (an estimated 35% mortality, around 850,000 deaths, although there is no verified data)
<b>Time Scope (Duration)</b>	From 2012 to the present
<b>Location</b>	Cases have been detected in 27 countries, although 80% are concentrated in the Middle East.
<b>Impact on the territory</b>	There was no effect on tourism or communication infrastructures

Source: UNWHO (2006, 2017, 2019); Kuo *et al.*, (2008)

The pandemic that most affected tourist flows was SARS 2003, as the mobility of people was limited for four months in the Asia / Pacific region. Tourism GDP reached interannual variation rates of -40% for some countries, taking eight months to achieve favourable rates of traveller arrivals (McKercher and Chon, 2004; Cooper, 2005). The recovery strategy wanted to restore the confidence of tourists (Chen, Jang and Kim, 2007; Mao, Ding and Lee, 2010) with marketing strategies: “Be my guest” in Hong Kong (Pine and McKercher, 2004), “COOL” in Singapore (Henderson and Ng, 2004), “Visit Japan” and “Charming China” (Gu and Wall, 2006). Only Taiwan implemented a long-term recovery plan (Mao *et al.*, 2010). In Singapore, the collaboration between private stakeholders to recover activity stood out (Henderson and Ng, 2004). In South Korea, hotels worked with airlines, travel agencies and other companies, sharing information and marketing campaigns (Kim, Chun, and Lee, 2005). In China, destination management companies and other tourism companies collaborated to revitalise the tourism sector (Gu and Wall, 2006). Discount policies were implemented to revive demand in China, Hong Kong, Korea and Japan. In Hong Kong, Korea and Singapore, measures such as staff reduction have been found to lower costs (Kim *et al.*, 2005; Pine and McKercher, 2004; Tse, So, and Sin, 2006). In Singapore and Korea, some companies implemented improvements in the training of their employees (Henderson and Ng, 2004; Kim *et al.*, 2005).

In the AVIAN FLU H5N1, the health impact was not very serious, but it did have a substantial impact on tourism, with a reduction of 12 million international tourists in the Asia-Pacific region, compared to the previous year (Wilder, 2006). The measures were not significantly different from those taken for SARS 2003; however, they were reactive despite knowing the consequences for tourism of the previous epidemic. Most countries did not have a plan to manage this situation, except for Taiwan (Kuo *et al.*, 2008).



In the other two epidemics, the health impact was greater. INFLUENZA A-H1N1 was declared a pandemic by the WHO and stands out because they identified rejection behaviours towards tourists from countries where the impact of the virus was more powerful (Oehmichen and Paris, 2010). As recovery strategies in countries where this virus hit hard, they opted for internal tourism, such as the “Live Mexico” campaign (Concanaco Servytur, 2009), and in general, marketing strategies were prioritised to convey destination security and mitigate the fear of tourists (Oehmichen and Paris, 2010; Mair *et al.*, 2016). MERS 2012 had no international restrictions on mobility (UNWHO, 2019) because it was located only in the Middle East.

### 3.3. Forecasts and uncertainty regarding COVID-19

In this section, a chronology of the central forecasts that organisations of recognised national (Exceltur) and international (UNWTO) prestige have published will be made until August 15th, 2020, when the research was closed. Exceltur is Spain's most important tourist lobby, with 33 leading companies nationwide.

The UNWTO forecasts started on 05/03/2020, warning that international tourist arrivals worldwide could decrease between 1% and 3% in 2020 compared to the 4% growth forecast for this year before the sanitary crisis. The consequences of this fall in international tourism revenue are between \$ 30,000 and \$ 50,000 million (UNWTO, 2020a). Just twenty days later, the UNWTO forecast worsened significantly, reducing international tourist arrivals by between 20% -30%, which meant a fall in international tourism income between \$ 300,000 and \$ 450,000 million, 30% of the revenue forecasts for 2020 made in 2019 (UNWTO, 2020b). The following report published on 04/14/2020 no longer offers quantitative estimates; it simply warns of the possible revision and proposes strategies for recovering the sector (UNWTO, 2020c). The latest data are not forecasts but the May Barometer, with a year-on-year decrease in demand of 56% and accumulated losses of \$ 320,000 million, advancing scenarios for the end of the year that forecast a decrease in demand of 60-80% and losses of around \$ 1,000,000 million (UNWTO, 2020d).

Exceltur's forecasts for Spain are not optimistic. If the report of 12/03/2020 (Exceltur, 2020a) estimated losses in the sector between € 18,000 and 33,000 million, the one on 03/24/2020 (Preferente, 2020) reached € 40,000 million and could destroy about 800,000 jobs. One week later, on 03/31/2020, the losses amounted to about € 55 million, a 32% drop compared to the previous year (Exceltur, 2020b). After just a few days, on 04/19/2020, it is known that until mid-June, it is prohibited to resume the activity and with the limitations on international mobility, estimating losses of € 124.150 million (Exceltur, 2020c). Two months later, on 06/18/2020, the lobby reduced the estimated € 83 billion losses in the sector (Exceltur, 2020d).

One conclusion can be drawn from this evolution of the forecasts: the scenarios are very dynamic due to high uncertainty. In this context, tourism stakeholders' perceptions of the pandemic's impacts and the design of strategies for recovery take on a particular role. For this reason, it is essential to study the formation of these perceptions in the early phases of the crisis.

#### 4. METHODOLOGY

The research comes in two parts: (1) the documentary study of the consequences of the tourism crisis — with particular attention to pandemics — and reports on the effects of COVID-19 on tourism; (2) A survey was carried out on 285 professionals in the tourism sector in Spain, between March 27th and April 30th, 2020. The sampling has a confidence level of 95% and a sampling error of  $\pm 5\%$ , with an intermediate degree of population heterogeneity ( $pq = 75\%$ ) given that they are professionals from the same sector. Professionals are considered those who work in the private sector, in public administrations, including political positions, and those who are dedicated to studying tourism (teaching and research). The distribution is representative of the sector:

**Figure 2**  
**DISTRIBUTION OF THE SAMPLE BY STAKEHOLDERS' TYPOLOGIES**

Private stakeholders	58%
Researchers	25%
Public destination managers	14%
Others (unions and private non-profit-making organisations)	3%

Source: Author's work.

It was not easy to define the sample because there is no accurate census of whole professionals participating in tourism activity. The online questionnaire was sent to business associations, different levels of tourism public administrations, research centres and tourism schools. A representative sample shows the perception of experts who are part of the decision-making of this sector.

The survey deals with six topics: (1) the impacts that the pandemic can generate, according to the study of other pandemics; (2) the assessment of the impact generated by issuing markets; (3) what typology of tourist space — coastal, interior and urban — the impact will be greater in; (4) the possibility that this crisis could generate some positive effect (open question); (5) evaluate the effectiveness of recovery strategies, based on the study of other pandemics; (6) and the assessment of possible future scenarios.

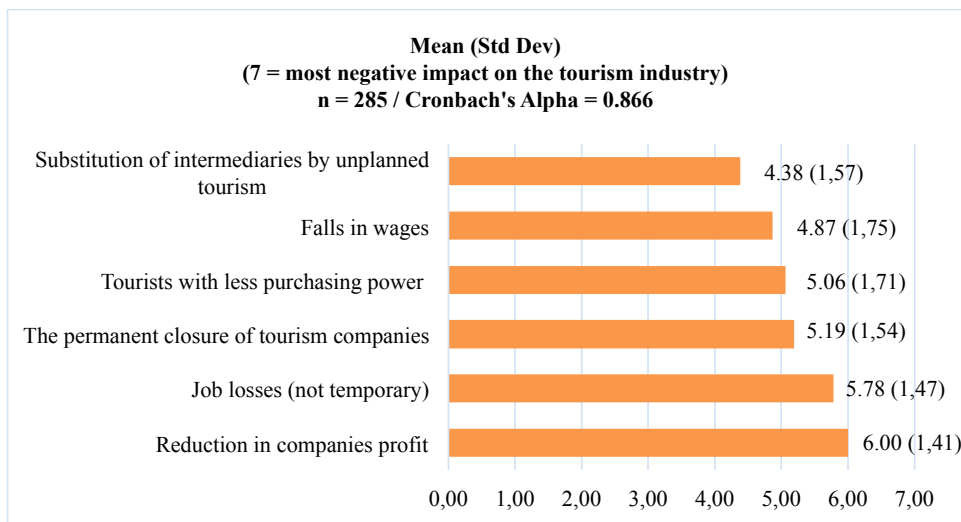
The results are analysed descriptively, their average value on a scale of 1 to 7 validated by the Cronbach's Alpha test (always obtaining values greater than 0.8). Standard deviations are also analysed as an indicator of homogeneity in the responses. In the cases of a high degree of dispersion in the responses, an analysis by type of stakeholder was carried out, segmenting them into two groups: the private sector ( $n = 165$ ) and the rest of the sample ( $n = 120$ ), made up of researchers and professionals from the public sector. Applying the t-student test, the differences between both groups are sought; This segmentation, although it does not reach high statistical representativeness, is indicative of the different perceptions groups of stakeholders have, which are related to their interests.

### 5. ANALYSIS OF THE PERCEPTION OF TOURIST STAKEHOLDERS

#### 5.1. Assessment of the impact of COVID-19 on Spanish tourism activity

The most feared effect in the tourism industry is the “fall in business profit”, with a 6 out of 7, representing the most negative score —Figure 3—. It is followed by “permanent job loss.” At a secondary level, with valuations close to 5 would be the “bankruptcy of companies” that have not been able to overcome the crisis, the fear that when the activity starts again “, tourists with a lower spending capacity” will arrive, as well as the “Lower wages” to employees. In a more lagging position is the possible loss of weight of the intermediation in the commercialisation of tourist products in favour of the arrival of “unorganised tourism” or self-organised. The standard deviations are within a high range, with values above 1, although there is an exceptional dispersion in the evaluation of the items “fall in wages” with 1.75 and “arrival of tourists with less purchasing power” with 1.74.

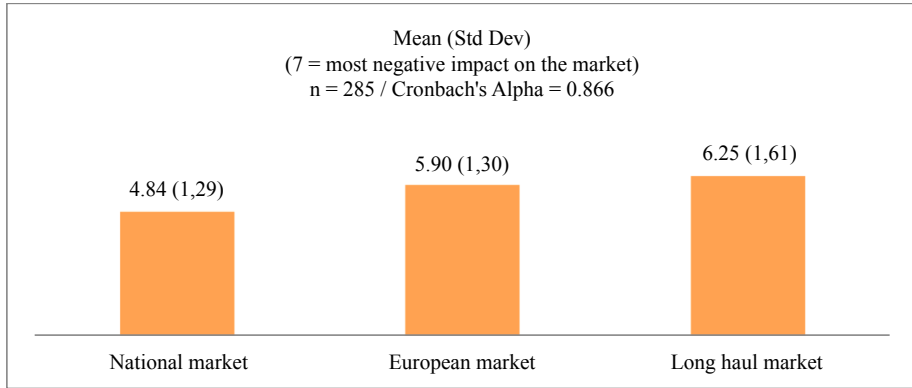
**Figure 3**  
**ASSESSMENT OF THE IMPACTS THAT THE COVID-19 CRISIS CAN GENERATE IN THE SPANISH TOURISM INDUSTRY IN 2020**



Source: Author’s work.

Regarding the impact on the outbound markets, the results indicate that the long-haul markets will be the most affected, with the greatest difficulties in recovering, followed by the European market. The domestic market obtains the lowest score of all (4.84), which could be expected but is quite striking in terms of dispersion, which is higher than the others (1.61). This score indicates a certain disagreement between professionals about the evolution of this market.

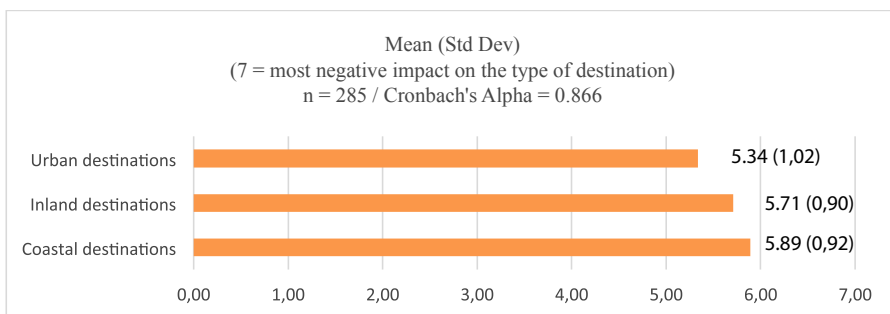
**Figure 4**  
**ASSESSMENT OF THE IMPACT GENERATED BY THE COVID-19 CRISIS IN OUTBOUND MARKETS**



Source: Author's work.

As far as the impact by type of destination is concerned, at the beginning of the pandemic, it was conjectured that the most affected areas could be those with the highest concentration of population, such as the coastline in summer. However, data suggests the stakeholders did not perceive this concentration in urban destinations (5.34) and thought they would have less impact than inland destinations (5.7). Reality shows that these perceptions were wrong.

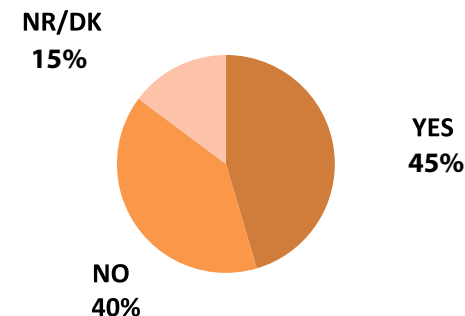
**Figure 5**  
**ASSESSMENT OF THE IMPACT GENERATED BY THE COVID-19 CRISIS BY TYPE OF DESTINATION**



Source: Author's work.

The fourth issue questioned whether this crisis could be a turning point and serve as a driver for change to address many of the challenge's tourism must face; slightly less than half considered this feasible.

**Figure 6**  
**CAN THE COVID-19 CRISIS CONTRIBUTE TO IMPROVING THE TOURISM SECTOR IN ANY WAY?**



Source: Author's work.

Secondly, this 45% were openly asked why, and they were positive; Most of those surveyed thought long-term and perceived that this crisis was the opportunity to develop more sustainable tourism and rethink the sector in terms of efficiency and innovation, although this means the bankruptcy of many less competitive companies in terms of sustainability. In this sense, the risk that small companies are the most affected and that large ones swallow them up is named. It shows the importance of taking better care of domestic tourism, which will gain prominence, improving the quality of services. Surprisingly, despite being the most valued recovery strategy, it is surprising that the improvement in safety and salubrity does not obtain the same support when it is considered a structural change. In addition, there is little or no mention of the construction of solid and lasting business cooperation and public-private collaboration structures. Nor are there many explicit references to a change in product policy.

**Figure 7**  
**IN WHAT WAY CAN THIS HEALTH CRISIS HELP TO IMPROVE THE TOURISM SECTOR?**

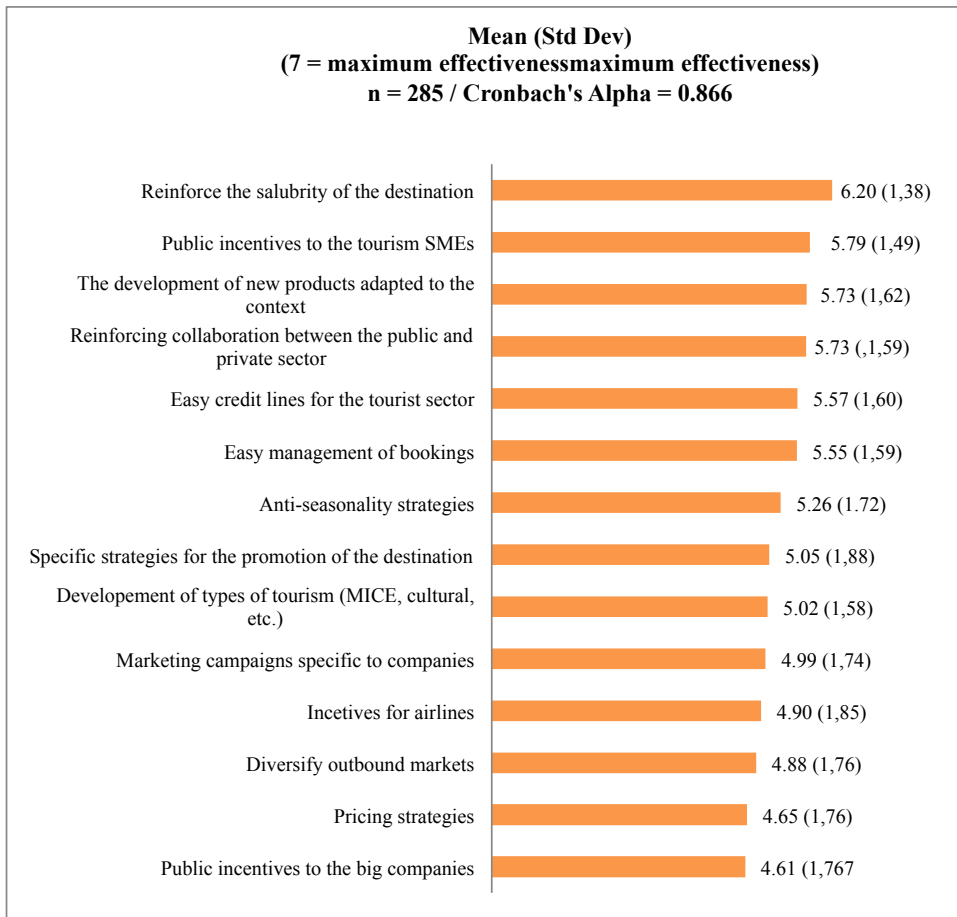
Most prominent aspects of improvement (n = 129)	% of comments out of total
Development of more sustainable tourism	27%
Restructuring and reinvention of the sector: efficiency and innovation	19%
National tourism growth	17%
Improving the quality of tourism services	14%
Improved safety and hygiene	11%
Others	12%

Source: Author's work.

**5.2. Prioritisation of strategies for the recovery of tourism**

The fundamental strategy is the “reinforcement of the hygiene of the destination”. Next, priority is given to “public incentives to SMEs in the sector”, the “development of new products adapted to the context” of health measures, generating more solid structures of public-private cooperation “reinforcing collaboration”, the urgent opening of “Credit lines at low interest and specific to tourism” and, finally, “facilitate the management of reservations made” before the crisis, both with intermediaries and with the end consumer.

**Figure 8**  
**ASSESSMENT OF THE EFFECTIVENESS OF RECOVERY STRATEGIES IN THE FACE OF THE COVID-19 CRISIS**



Source: Author’s work.

It is surprising that little weight is given to “promotion” in the destination and companies among the least valued aspects. On the other hand, just as great importance is given to the Administration’s financial support to small companies, the stakeholders do not appreciate the same effectiveness when these aids are proposed to large companies or airlines, even when doubts begin about the viability of flights since the beginning of the pandemic due to the capacity restrictions that the health authorities wanted.

The sector does not want to enter a downward “price strategy” —although it will be inevitable— assigning it one of the lowest valuations and the “diversification of source markets”, probably because this crisis affects the whole planet. The prioritisation is evident, but the lowest score is 4.6, a high value within the proposed scale. Regarding the standard deviations, a high range is appreciated -values greater than 1.30—but the two actions with the highest consensus are the two most highly valued.

**5.3. Comparative analysis of the results by type of stakeholder**

It draws attention the low valuation and little homogeneity in the replies regarding “lower wages” for employees. On the contrary, the impact on business profit has been assessed as the most negative of all, inferring that stakeholders perceive that most crisis costs will be borne by the entrepreneurs, reducing their business profit. However, when performing a segmented analysis by a group of stakeholders, it is observed that since the contrast statistic (Z) is greater in both cases than the theoretical value that follows the Student’s-distribution, there are significant differences between the average evaluations of each group. Entrepreneurs assume that the crisis, in economic terms, will affect them more and not so much their employees, resulting in 4.695 vs 6.154, while, in the rest of the respondents, these differences are not so evident: 5.110 vs 5.780. This fact can be attributed to the implications of having direct interests in the sector’s evolution after the crisis, skewing their perception of the evolution and integration into the tourism system of the economic impacts that may be generated. Regarding the rest of the impacts evaluated concerning the tourism industry and in the different issuing spaces and markets, no significant differences are observed between both populations.

**Figure 9**  
**COMPARATIVE ANALYSIS OF IMPACTS BY PROFESSIONAL TYPE**

IMPACTS	Private Sector (n = 165)		Other Professionals (N=120)		Z	d.f.	t-student ( $\alpha / 2; df$ ) <sup>2</sup>
	Mean	StdDev	Mean	StdDev			
Fall in wages	4.695	1.866	5.110	1.528	<b>2.061</b>	279	<b>1.969</b>
Reduction in business profit	6.154	1.363	5.780	1.427	<b>2.230</b>	250	<b>1.970</b>

Source: Author’s work.

2  $\alpha = 0.05$

In recovery strategies, the little importance given to promotion and marketing strategies is striking, when in the literature, they are revealed as one of the main strategies for the recovery of destinations. Recovering the destination's image has been one of the strategies with greater prominence, but here they are valued with relative importance. The private sector assigns a higher valuation to promotion strategies compared to the rest of the tourism professionals (5.176 vs 4.744 in destination promotion and 5.221 vs 4.658 in companies). In destination promotion strategies, there are no significant differences between the value of the contrast statistic and the value of the t-student. However, it is practically at the limit, and its standard deviation is the highest of all the strategies, suggesting a great heterogeneity in the assessments. In the case of public incentives to airlines, there are also major differences.

**Figure 10**  
**COMPARATIVE ANALYSIS OF RECOVERY STRATEGIES BY PROFESSIONAL TYPE**

STRATEGIES	Private Sector (n = 165)		Other Professionals (N=120)		Z	d.f.	t-student ( $\alpha / 2$ ; df) <sup>3</sup>
	Mean	StdDev	Mean	StdDev			
Specific destination promotion strategies (carried out by the Administration)	5.176	1.914	4.744	1.779	<b>1.960</b>	267	<b>1.969</b>
Specific promotional campaigns carried out by companies	5.221	1.752	4.658	1.670	<b>2.751</b>	263	<b>1.969</b>
Incentives to airlines provided by the Tourist Administration	5.091	1.934	4.573	1.676	<b>2.417</b>	274	<b>1.969</b>
Public incentives for large companies in the sector (hotel chains and tour operators)	4.799	1.875	4.385	1.568	<b>2.026</b>	277	<b>1.969</b>

Source: Author's work.

#### 5.4. The assessment of possible scenarios

The last topic is the assessment of four scenarios so that the percentage sum was 100%. It must be remembered that the survey was conducted in April 2020, when uncertainty in Spain was at its highest level.

<sup>3</sup>  $\alpha = 0.05$

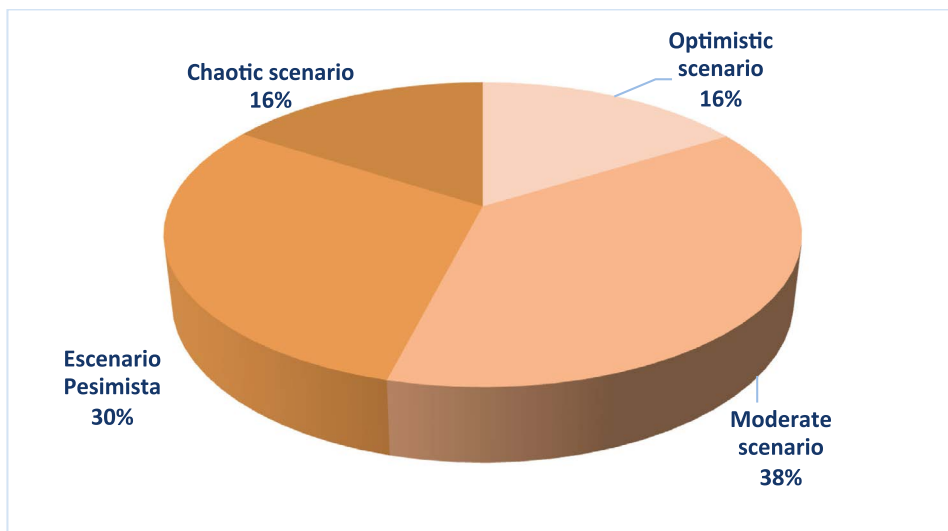


**Figure 11**  
**SCENARIOS PROPOSED**

<b>OPTIMISTIC SCENARIO</b>	<b>MODERATE SCENARIO</b>	<b>PESSIMISTIC SCENARIO</b>	<b>CHAOTIC SCENARIO</b>
There are no tourist movements until May 2020.	There are no tourist movements until July 2020.	There are no tourist movements until September 2020.	There are no tourist movements until January 2021
In May, almost all (70%) shops, restaurants and hotels open.	Some (50%) shops, restaurants and hotels open in July.	Some (30%) shops, restaurants and hotels open in September.	In 2021 some (30%) shops, restaurants and hotels open.
More than 30% of tourist businesses are bankrupt or sustained thanks to State aid.	More than 50% of tourist businesses are bankrupt or sustained thanks to State aid.	More than 30% of tourist businesses are bankrupt or sustained thanks to State aid.	More than 50% of tourist businesses are bankrupt or sustained thanks to State aid.
Residents' social reaction to tourists' origin is not adverse.	Residents' social reaction to tourists' origin is uneven.	Residents' social reaction to tourists' origin is not adverse.	Residents' social reaction to tourists' origin is very adverse, with a ban on some source markets due to the risk of contagion.

Source: University Institute of Intelligence Research and Tourism Innovation.

**Figure 12**  
**ASSESSMENT OF POSSIBLE SCENARIOS**



Source: Author's work.

It seems clear that the outlook at that time pointed to a scenario between moderate and pessimistic. Unfortunately, a clear positive perception arises from these assessments since only 16% were in chaotic scenarios, a perception that is more in line with the reality that we have been able to verify in Spain.

## 6. DISCUSSION AND CONCLUSIONS

### 6.1. Theoretical implications

The perceptions of tourism stakeholders can help anticipate responses (Faulkner, 2001; Ritchie, 2004; Evans and Elphick, 2005; De Sausmarez, 2007, Moreira, 2008). Some lessons have been learned from previous crises (Page et al., 2006; Mair *et al.*, 2016; Backer and Ritchie, 2017; Chan, Nozu, and Cheung, 2020) that could be extrapolated to this crisis despite the high degree of uncertainty it has generated. This research identifies some variables that explain destinations' resilience against exogenous crises. According to Ritchie and Jian (2019), comparing crisis impacts and discussing strategies based on crisis typologies is scarce, so the present research tries to fill this gap.

The case studies identify the unique factors of pandemic-motivated crises. However, when comparing the data of this pandemic with others, differences are established since the scale that COVID-19 has acquired in terms of diagnosed cases and deaths, as well as how it affects tourism, making it hard to predict medium-term global impact. The forecasts made by the main tourist institutions show great volatility, having evolved exponentially during the first months of the crisis.

As observed in other cases of pandemics, recovery strategies will need approaches that enhance collective intelligence from the participation and collaboration of the different stakeholders in the sector, which will be the key to reducing the degree of uncertainty and maximising the efficiency of recovery strategies.

### 6.2. Impacts, strategies to recovery and managerial implications

This work begins with the possibility of taking advantage of a very unusual situation, such as the first days of a dramatic pandemic, to obtain relevant information on stakeholder perceptions at that precise moment. Several conclusions can be drawn from the evaluation of the impacts by the stakeholders: (1) The need to commit to national tourism, as it is the least affected market. (2) By type of destination, the binomial impact and resilience capacity have been assessed, with urban destinations perceived as those interpreted to recover better, possibly due to having more possibilities to diversify their offer. Likewise, the perception that inland tourism will not come out as unscathed as might be thought stands out, perhaps due to its fragile business network. (3) The perception of the impacts on the industry in the first few weeks of the crisis tends towards pessimism with relatively high valuations — above 4.3 out of 7 — and positioning itself in worse scenarios than they have been, inferring a possible aversion of people to leave their countries, along with the fear that there may be a general fall in the income of Spanish families that will restrict the decision to travel. According to those surveyed, these negative perceptions translate into

greater impacts for the employer, with decreases in business profits compared to lower wages or the precariousness of workers' working conditions. The permanent destruction of jobs is perceived as one of the most severe impacts. Nevertheless, these perceptions can be nuanced when analysed and segmented by type of stakeholder, as will be explained later.

Recovery strategies must be efficient, optimising the scarce resources available in this new tourist reality, where the drop-in demand is severe, as indicated by all the forecasts presented. The assessments carried out by the stakeholders of the different strategies draw attention to a certain heterogeneity — all Dev. Std. Higher than 1.30— in the general perceptions and very high importance to any of the proposed actions —with 4.6 out of 7 the lowest value. This indicates that all the strategies were welcome for the sector in these first weeks, which reveals a great concern, considering that public intervention and implementing actions to reactivate tourism are necessary.

Regarding the evaluations given of the different proposed strategies, the promotion of the destination is not a priority strategy, contrasting with that which has been observed in other crises studied (Walters and Mair, 2012; Chen *et al.*, 2007; Mao *et al.*, 2010; Chacko and Marcell 2008; Cohen 2007). As stated in section 2.2 when other crises caused by viruses such as SARS in 2003 were analysed, marketing and communication strategies to restore the tourists' confidence were essential, or as in the case of the crisis caused by INFLUENZA A-H1N1, where marketing campaigns were also a priority. However, in the empirical results obtained in this research, strategies based on marketing campaigns have not been the best valued by Spanish stakeholders. Discount policies were implemented to reactivate demand in China, Hong Kong, Korea and Japan during SARS in 2003 and INFLUENZA A-H1N1, yet, price strategies have been among the worst value in our study. The same happens with the strategies developed by Singapore and China in other crises, based on a reinforcement of collaboration between private stakeholders, a strategy Spanish stakeholder do not even value for this crisis.

Financing lines for SMEs are also considered essential, especially since these companies are the least prepared to face a crisis —in terms of liquidity to meet fixed costs— (Bain and Ernst and Young, 2020). This is one of the most significant adverse effects because if there is a future recovery in tourism in Spain, it could transform the structure of the tourism industry, with the disappearance of small companies and subsequent market concentration in the large firms within the sector (Mair *et al.*, 2016; Madrid, 2012).

It is important to note that at the end of this research in August 2020, the specific measures to support and reactivate the tourism sector began to be defined. The Tourism Sector Boost Plan (GE, 2020) announced at the State level does not solve the most urgent and necessary aspects, such as the issue of the destruction of jobs or encouraging local tourism. Although it seems that it is beginning to commit to some strategies that seem to fit in with the perception in April of the stakeholders, because the incentives to airline companies and large companies are few and far between —remember that these were the least valued strategies—, in fact, Spain has not rescued any airlines. Of the 4.262 million Euros of the “Plan to Promote the Tourism Sector”, there are no specific lines in this regard (GE, 2020). The constant claims of tourists to air companies and travel agencies because these companies are not refunding the money from the reservations have begun to be a problem for the sector's image. The stakeholders know that “those companies

that best manage cancellations will see their reputation strengthened”, as stated by some professionals surveyed.

Professionals in the tourism sector are not sufficiently aware of this situation’s seriousness, so their perceptions are positioned in more neutral scenarios. The idea of taking advantage of the crisis to improve the sector’s sustainability has just not caught on. There are significant biases according to the interests depending on the type of stakeholder, so their perceptions could condition the definition of recovery strategies to overcome the crisis because some of these stakeholders are precisely the ones who make the decisions or influence it. Finally, it is essential to note that several of these perceptions at the beginning of the pandemic are not materialising in later phases of the crisis, and consequently, the design of strategies to be applied could not be adequate.

### 6.3. Limitations and future research

The first and foremost limitation of this study is the volatility of the data and the uncertainty generated by the pandemic when analysing the stakeholder’s perception and the quantitative forecasts. Secondly, to achieve a more representative sample for the segmentation of stakeholder typology, which includes tourists, local community and press.

The research findings offer new insights that point to future work lines, complementing this research with a new survey process once the crisis is over. Thus, it can be seen if the decisions prioritised at the beginning of the crisis were made, assessing the influence that the different stakeholders have been able to have on the definition of management strategies recovery, as well as evaluating the effectiveness they have had.

As mentioned above, it seems essential to study whether this crisis can lead to a change in tourism development criteria closely linked to growth, which has dominated most destination management models until now. It is necessary to explore the possibility of more sustainable models that work under different parameters, closer to the idea of post-growth (Ortega *et al.*, 2020).

In the same way, it is possible to delve into the theoretical model proposed to assess destinations’ recovery capacity —or degree of resilience— in the face of a crisis generated by exogenous factors. It may be interesting to analyse the empirical experience of this crisis, both in the definition of its dependent variables and its level of significance.

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