Original Research Article

Business perception of the COVID-19 pandemic and its impact on tourism: A qualitative analysis of the destination Extremadura, Spain

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ABSTRACT

The COVID-19 pandemic has caused significant disruption to the tourism industry. This situation has forced industry players to take important steps, but it has also created new business opportunities. Using qualitative analysis tools, this study analyzes the perceptions of entrepreneurs in the sector on the COVID-19 pandemic and outlines measures that should be taken to help the sector recover in Extremadura, an emerging inland tourist destination in southwestern Spain. The purpose of this study was to assess the main concerns of Mexican tourism entrepreneurs about the economic impact of the crisis on their businesses and the main measures they requested to overcome the crisis.

Keywords: COVID-19; tourism; qualitative analysis; Extremadura

1. Introduction

Owing in mid-December 2019, the city of Wuhan, China, reported a first outbreak of coronavirus (COVID-19), a highly transmissible human-to-human respiratory disease similar to severe acute respiratory syndrome (SARS), which appeared in 2003[1]. During the months of January and February 2020, this outbreak was largely ignored, in some cases, and underestimated, in others, by most political leaders around the world, considering that the contagions were very localized geographically in China, despite warnings from the intelligence services of some countries about the possibility that the situation could lead to a global pandemic[2]. Faced with this situation of passivity and lack of foresight, the virus spread rapidly to Italy at the end of February and to Spain in the first weeks of March. Thus, following the declaration of the pandemic by the World Health Organization (WHO) on March 11, 2020, Europe and the United States became the center of the pandemic. The spread of the virus was so rapid that on March 23 there were confirmed infections in 190 countries or territories[1].

In the absence of a vaccine and the non-existence of medical treatments, most countries reacted with interventions of a non-pharmaceutical nature, such as confinements (home isolations, mandatory or voluntary quarantines), social distancing, closure of schools and universities, paraly-
sis of non-essential economic activity, cancellation or postponement of all types of events (trade fairs, concerts and music festivals, sporting events, etc.) and limitations on the number of people gathered in public or private spaces[2].

In addition, drastic restrictions aimed at limiting mobility, especially between people from different countries, were put in place. Thus, many airlines restricted or eliminated their commercial flights to or from the countries most affected by the pandemic.

While the greatest negative impact of COVID-19 has been, and continues to be, the loss of human lives, its social, economic and political effects, both in the short and long term, are and will be quite significant[3]. Precisely because of the mobility of people, inherent to the very nature of tourism activity, and because of the person-to-person interaction that characterizes it[1], tourism is undoubtedly the economic activity that is suffering the most from the negative effects of COVID-19. In fact, Farzanegan et al.[3] show that there is a significant and robust association between countries’ international tourism flows and their levels of exposure to COVID-19. Indeed, the countries that concentrate most of these tourist flows (China, the United States, Spain, France, Italy) are the hardest hit by the pandemic.

The economic impact of COVID-19 on tourism is unprecedented. The World Tourism Organization[4] noted that, during the first six months of the year 2020, the number of international tourist arrivals fell by 65% worldwide; the months of April (-97%), May (-96%) and June (-93%) were those that recorded a plunge never seen before in the movement of tourists at the international level. During these first six months of the year 2020, the geographical areas most affected by this slump in tourism activity were Asia-Pacific (-72%) and Europe (-66%).

Tourism receipts have recorded declines in line with the evolution of international tourist arrivals[4]. At the national level, and considering the first six months of 2020, the countries most affected by this situation were Spain (-70.6%), Italy (-67.7%), the United States (-50.5%), France (-49.4%) and China (-40.9%).

Although there are some studies that analyze the impact of the epidemic on the tourism supply or that present the changes in tourist behavior in the face of this new normality, the fact is that very little research has been done so far on the perception that tourism entrepreneurs have of this situation and on the business management measures that should be taken in the coming months. This article analyzed the perception of the sector’s entrepreneurs on the COVID-19 pandemic and outlined the measures that should be adopted to help the sector recover in Extremadura. To this end, more than one hundred responses were collected from tourism businesses located in one of the most important emerging inland destinations in the Spanish tourism market, Extremadura.

To achieve its objective, the paper is structured as follows: the theoretical framework addresses the effects that the epidemic is having on tourism activity, both from the point of view of supply and demand; it also presents some of the measures proposed in the scientific literature that tourist destinations should adopt to survive in an increasingly uncertain future, as well as the new opportunities arising as a result of the crisis. Next, the most relevant methodological aspects of the qualitative analysis are presented. The main results are then listed and, finally, the conclusions reached based on the information analyzed are presented.

2. Theoretical framework

2.1. Effects of COVID-19 on tourism activity

The COVID-19 epidemic is having a significant impact on economic development worldwide. The reduction in demand translates into a decrease in both the equilibrium price and the quantities offered in the markets[5]. In addition, the suspension of international travel has led to the reappearance of
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geographical barriers between countries, which has generated a process of temporary "de-globalization" practically worldwide[6].

While the above is true in any economic activity, it is more serious in tourism, given that it is one of the most sensitive and vulnerable sectors in the face of internal and external shocks[7-9]. The COVID-19 disease has affected all parts of the tourism value chain. For example, cancellation of events, closure of accommodations and attractions have negatively affected catering services, laundry services, restaurants, etc.[2] Although specific studies have been conducted to understand the effects of the pandemic on specific tourism destinations[10-16], what is certain is that all global tourism destinations are being affected, to a greater or lesser extent, by the negative effects of COVID-19.

However, unlike previous pandemics, whose effects on tourism activity have been local and concentrated in a relatively short period of time, everything seems to indicate that, both because of its global nature and its continuity over time, the COVID-19 epidemic will have a transforming effect on the tourism sector[6,17]. These changes affect both supply and demand.

From the supply side, several changes are taking place to adapt to the new normal of the pandemic. One of the most immediate and necessary changes is the implementation of sanitary protocols, which require, among other things, the disinfection of hands with hydroalcoholic gels, limitations on the capacity of indoor spaces, the establishment of safety distances between customers, the extension of meal hours, the limitation of restaurant capacity, among others[18].

For its part, the tourism supply will also have to rethink its pricing policies, as a result of the reduction in demand, the foreseeable depersonalization of tourism activity in the coming months and the capacity restrictions that many infrastructures will suffer. In fact, pricing policies will have to be much more dynamic from now on in order to adapt almost instantaneously to demand.

Another obvious change is the acceleration of digitalization[18] and the introduction of artificial intelligence and robotics in hotel management[19] to increase health safety in establishments, which will become a key factor in the recovery of the tourism industry in the post-COVID era[20]. In response to demand, tourism businesses will have to undertake a digital transformation, ranging from touchless technologies to service automation.

Traditional tourism destinations will also have to face two main problems. On the one hand, areas suffering from saturation problems, which clearly exceed their carrying capacity, will have to adopt measures to avoid crowds of tourists in certain areas and at certain times. To this end, the determination of a new carrying capacity of the destination is fundamental, and will be determined not only by the impacts that tourism activity may have on the environment, but also on the expansion of the pandemic, or of new epidemics/pandemics that may arise in the future. On the other hand, the emergence of new tourist destinations that are less crowded and progressively more demanded by tourists will significantly increase national and international competitiveness among them. We are heading, therefore, towards a tourism scenario with less overcrowding, but much more competitive.

From the point of view of demand, COVID-19 has generated a change in tourist behavior. This change is determined by the combination of interactions between internal factors (motivation, attitudes, beliefs, etc.) and external factors (economic environment, security, sociocultural environment, etc.[21]) But in this procedure, as well as in the decision making process to choose a specific tourist destination, the perception of risk plays a leading role[22,23].

When faced with the perception of high risk at a tourist destination, tourists tend to change their behavior: they cancel more trips[24], take more trips by car[25], make more last-minute reservations[26], are more concerned about the health aspects of the destination[27], avoid close contact with other people and
engage in more outdoor activities\cite{28}.

In the specific case of the COVID-19 epidemic, the study by Chebli and Said\cite{29}, based on a non-probabilistic survey of 308 tourists between April 10 and 20, 2020, reveals some significant changes in the behavior of tourists. Among the changes detected in this study are the following:

(1) Choice of less known tourist destinations: most of the tourists consulted maintain that in the next trips they will choose less popular destinations, in order to avoid being infected due to the over-crowding of tourists in the best known destinations.

(2) Refusal to travel in groups: the long confinements experienced in recent months by tourists from all over the world have generated in them the desire for independence, to feel free and to be the sole owners of their decisions. In this situation, group travel, in which the individual freedom of tourists is reduced and their activity is highly conditioned by an organized program, is no longer interesting.

(3) Increase in travel insurance: since the COVID-19 crisis, there has been a growing need for tourists to obtain accurate information on the safety of the destination to which they are going to travel and to take out travel insurance in the event of flight cancellations, hospitalization at the destination, high medical treatment costs, etc.

(4) Reduction of travel expenses: tourists will tend to reduce expenses, focus their interest on closer destinations (with lower travel costs) and reduce the average length of stay.

(5) Increased environmental awareness: the environmental regeneration of many tourist destinations during the period of confinement has generated an ecological awareness among tourists, which may have remained dormant until now.

(6) Growing search for information: the need to know the health conditions of the destination, its medical infrastructures, etc., translates into a growing demand for transparent and accessible information on the destination to be visited. Thus, knowledge and promotion of “COVID-free” establishments and destinations will be a fundamental management strategy in the coming years.

(7) Greater tendency to travel in the low season: the search for uncrowded places and the reduction of travel costs, not only for travel, but also for accommodation and meals, will generate greater interest in traveling in the low season, which will force tourism managers to restructure the offer, to define seasonal products, to redistribute labor recruitment, etc.

In short, the COVID-19 pandemic is proving to have a transforming capacity for tourism activity without historical precedent, both because of the need for tourism establishments and infrastructures to adapt to health protocols and because of changes in the preferences and motivations of tourists.

2.2. Measures to be implemented and new opportunities in the post-COVID-19 scenario

It is clear that the current pandemic situation makes it necessary to implement a series of measures in the tourism sector that are here to stay, given that their duration is expected to be long and that future pandemics are likely to be increasingly frequent, given that the number of infectious diseases has increased fivefold in just a few decades\cite{30}.

Chang et al\cite{9} propose a decalogue of measures that represent a real revolution in the future management of tourism at the international level. Some of these measures are the following:

(1) Social distancing between tourists should be regulated and strengthened in all aspects of the tourism industry, but especially in religious tourism, adventure tourism, agritourism and Meetings, Incentives, Conventions & Exhibitions (MICE) tourism.

(2) Travel and entry restrictions should be applied to both domestic and international destinations.
(3) The health situation of destinations should be monitored to ensure safety, through frequent monitoring of diseases and epidemics; identification of seasonal indicators of the risk of outbreaks and re-infection; design and implementation of health protocols for residents, tourists and employees in the sector; and development of reliable tests for tourists.

(4) The transportation sector should update its rules and regulations on social distancing and safety standards, especially in the processes of embarkation and disembarkation, food service or onboard activities, medical services, and crew health qualifications.

(5) Major tourist events should also update their regulations on social distancing, especially at sporting events, musical or theatrical performances, concerts, fairs, exhibitions, etc.

(6) Hotel establishments should pay particular attention to social distancing at check-in and check-out, catering and social activities.

In addition, the countries most affected by the COVID-19 crisis are introducing measures of an economic nature. In particular, some of the most immediate changes have been cross-cutting fiscal and monetary changes to protect jobs in the sector and ensure the liquidity of SMEs. Among the fiscal benefits, the most frequent have been exemptions or deferrals of value added tax (VAT) and corporate income tax, as well as emergency aid and economic assistance to SMEs and self-employed workers in the sector. The most common monetary policies include the creation of credit lines with subsidized or zero interest rates, moratoriums on the repayment of loan installments and actions to facilitate access to credit and financing.

Finally, among the aid provided by the different countries are also those related to the labor market, with the priority objective of avoiding an increase in unemployment in the sector. Among these measures, the UNWTO points out the following as the most applied by international tourism destinations: temporary employment regulation files financed by the State, direct subsidies for sole proprietorships and microenterprises, reduction or deferral of social security contributions, monetary transfers to unemployed workers, reduction of taxes linked to wages, promotion of teleworking in cases where it is possible, online training on digital transformation of companies, etc.

But, as in any crisis, the COVID-19 pandemic is also creating new tourism business opportunities. Thus, the epidemic is generating greater awareness of the need to protect the environment and to move towards greater sustainability in tourism. Chang et al. point out that destinations should take advantage of this situation to restructure their tourism activity to maximize their economic, social and environmental contributions. For his part, Niewiadomski argues that the process of temporary de-globalization that the world is undergoing is an unrepeatable opportunity to redevelop tourism in terms of sustainability, i.e., to make tourism less exploitative and ambitious, more respectful of local communities and their cultures and traditions.

Moreover, the new normal represents an excellent opportunity to reopen the debate on the uncontrolled growth of tourist arrivals in oversaturated tourist destinations and to rethink the implementation of new tourism degrowth strategies, because it is known that environmental quality in many tourist destinations around the world has improved during the first wave of the pandemic, especially in air quality and pollution reduction.

On the other hand, the flight from crowds of people and the search for lesser-known destinations represents a great opportunity for emerging tourism destinations. The managers of these new destinations should be able to promote them and create an original and atypical destination image. In this sense, rural tourism is emerging as a niche market with great potential for future growth.

Likewise, the growing motivation of tourists to travel in the low season represents an excellent opportunity to depersonalize destinations.
The search for closer destinations, the shortening of the average stay and the reduction of travel costs represent a great opportunity to promote domestic or proximity tourism\cite{16}, or what could be defined as end tourism, that is, tourism practiced by tourists within their own region or province. In addition, travel by private car will tend to increase significantly\cite{37}, to the detriment of the use of public transport for travel.

Thus, the increased environmental awareness of tourists will possibly translate into a greater demand for environment-related activities, such as ecotourism, active or nature tourism, among others. But the greater demand for this type of tourism will also be accompanied by greater pressure on the environments in which it is practiced, which will force managers to anticipate the measures to be implemented to prevent excessive tourist pressure from resulting in environmental deterioration.

### 3. Methodology

As mentioned in the introductory section, the objective of this study was to analyze, from a qualitative point of view, the perception that tourism entrepreneurs have of the COVID-19 crisis, as well as to extract some of the concrete measures proposed by them to get out of this situation. It is, therefore, a descriptive research in terms of its scope, since the aim is to know the perception that tourism entrepreneurs have of the impact caused as a consequence of the health crisis. For this purpose, since this is a topic that has no precedents in the literature that would allow us to have previous indications, it was decided to opt for an unstructured approach. A content analysis assisted by the qualitative analysis software NVIVO was then carried out.

According to Smith\cite{38}, this technique consists of extracting desired information from a body of material by systematically and objectively identifying specific characteristics of the material. Thus, the aim is to categorize the data in order to be able to summarize, classify, tabulate and draw inferences from them.

To obtain the information, the collaboration of all the existing lodgings in the region is requested, a total of 1589 lodgings according to the census carried out by the Registry of Tourism Companies and Activities of Extremadura, whose distribution by typologies can be seen in Table 1. A self-administered questionnaire was sent to the total population, asking the entrepreneurs in an open-ended way what is their perception of the impact that the COVID-19 health crisis has had on their businesses; the responses were collected between the months of June and July 2020. In total, 122 valid questionnaires were obtained, whose distribution by type of lodging can be seen in Table 1. It should be clarified that a valid questionnaire is understood as one that allows identification, through the code provided for this purpose, of the type of lodging and that, in addition, is completed correctly.

<table>
<thead>
<tr>
<th>Types of lodgings</th>
<th>Total population</th>
<th>Sample</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hoteliers</td>
<td>450</td>
<td>19</td>
<td>4.22</td>
</tr>
<tr>
<td>Non-hotel</td>
<td>342</td>
<td>33</td>
<td>9.64</td>
</tr>
<tr>
<td>Rural</td>
<td>797</td>
<td>70</td>
<td>8.78</td>
</tr>
<tr>
<td>Total</td>
<td>1589</td>
<td>122</td>
<td>7.68</td>
</tr>
</tbody>
</table>

Once the questionnaire is closed, we proceed to the analysis that allows us to organize, classify and synthesize the information collected by creating a structure of nodes and sub-nodes, in which the frequency of occurrence of topics in the text is used.

For this purpose, the most frequent “word search” tool is used to determine the frequency of occurrence in the text of similar, derived and synonymous words, and to eliminate others that do not contribute value to the analysis. Based on this search, the word cloud is constructed after various tests to establish the optimum number of words to be included in order to achieve an enough frequency of repetition and acceptable visibility in the graphic representation. Based on the results, an initial structure of nodes is proposed and all the information in each of them is classified and codified. Finally, it is analyzed whether the initial proposed structure provides an acceptable coverage of the
available information and, when necessary, those topics that have not been automatically detected are created until an optimal coverage rate of the text is reached.

This process is iterative, and is repeated in each of the nodes and sub-nodes created until the number of references coded in each of the existing nodes and sub-nodes requires it. Next, a hierarchical map is created that graphically shows the structure of sub-nodes created according to the references coded in each one of them.

To conclude the analysis, the results obtained are interpreted and conclusions are drawn from the information analyzed.

4. Results

The total set of data used for this research work consists of 122 valid questionnaires received from tourism entrepreneurs in the region of Extremadura. First of all, in order to find out which themes underlie the information provided, it was decided to use an analysis tool, the word frequency search, the graphic expression of which can be seen in Figure 1.

Figure 1. Word cloud of the 50 most frequent words in the responses of entrepreneurs.

As can be seen, the word impact occupies a central place in the cloud and, together with aid, companies, sector and measures, is positioned as one of the expressions most used by tourism entrepreneurs to express their opinion on the current situation of the sector. It follows that much of the content will revolve around the description and assessment, from the perception of the tourism entrepreneurs themselves, of what has been the impact of the health crisis on their businesses. For this reason, it was decided that this will be one of the topics into which the information collected will be classified. In parallel, and based on the most frequently used words, it was decided that the second thematic axis would be in relation to the measures and aid requested by the entrepreneurs. In the same way, the term administration is included as a theme in which all the opinions expressed by the tourism entrepreneurs on the actions of the administration in relation to the health crisis are coded.

A first exploration of the information provided allows us to verify that there is an optimum degree of coverage with this first classification of nodes; therefore, it is decided to continue the analysis of the perception that tourism entrepreneurs have about the three main thematic axes identified: Impact, Measures and Administration.

4.1. Analysis of the Impact node

Firstly, and because it is the largest in terms of the number of references it contains, it was decided to analyze the thematic axis Impact, which can be schematized by means of the word cloud (Figure 2). This node gathers the information that the entrepreneurs have expressed to describe the consequences that the health crisis has had on the evolution of their businesses.

Figure 2. Word cloud of the “Impact” node Source: own elaboration.

As can be seen, the central axis of the theme is the impact they have suffered on different aspects, which explains the frequent use of this word cloud to define how they are experiencing the consequences
of the current health crisis on their businesses. Along with this, it can be seen that reserves, sector, income, expenses or season are positioned as the most frequently used words in the content collected on this topic and, for this reason, for the analysis of the Impact node it was decided to create a structure of sub-nodes that includes the following aspects: “perspective”, “economic level”, “drawbacks”, “description” and “closure”. The detailed analysis of each of these sub-nodes will make it possible to know what the perception of tourism entrepreneurs in the Extremadura region is of the impact of the COVID-19 crisis.

The main statement made by the entrepreneurs when describing the impact of this crisis is the incidence at the “economic level” on their businesses. In turn, different sub-nodes are highlighted to help structure the content of this sub-node. On the one hand, with respect to employment, the businessmen state that the current situation has had an enormous economic impact and, therefore, on employment, which affects both “new hires and older employees”. In reference to the sub-node “expenses”, it is stated that businessmen perceive that adapting to the new normality has meant an increase in the expenses associated with their business which, in turn, has been accompanied by a decrease in income due to the scarce movement of tourists, which makes it even more difficult for them to support the fixed expenses generated by their businesses. Thus, some entrepreneurs state: “the apartment right now only produces expenses” or that the situation has meant “higher expenses and lower income”.

In addition to this situation, also in the economic sphere, the decrease in income is cited, which in most cases they qualify as a total loss of income, but in other cases they refer to it as a decrease in income, so it is understood that the incidence has not been the same in all the companies; factors such as the total or partial cancellation of the business, the extension of the limitations imposed on mobility, the duration of the mandatory confinement, etc., have been identified, which affect this different evolution.

To conclude the analysis of the sub-node that includes the impact at the economic level, the entrepreneurs focus their attention on the description of the evolution of reserves. Thus, it is stated that the cancellation of reservations, during and after the months of confinement imposed as a preventive measure, has had a strong economic impact that is accentuated, above all, because it occurred during the months in which the high season began; “all the reservations for the highest seasons of the year were cancelled (Easter, May long weekend, concerts, etc.)”, “I have lost the income from the dates that provide the most income for the year...”, “[in] the spring season, the best season of the year, they cancelled all my reservations” or “everything is empty until July and August”. However, when it comes to the evolution of reservations, once the legally established period of impossibility to travel has ended, some establishments state that the suitability of their accommodations, being isolated and in less crowded places, “has favored an improvement in reservations”, “a slight improvement is now beginning”, and in some cases they even state that “after the reopening, the number of reservations has multiplied due to the high demand for inland tourism...”. Again, it can be deduced that the impact cannot be equally attributed to the sector as a whole, but that there will be differences that will require further analysis in order to understand more exhaustively what the impact of this crisis has been on the sector.

Another of the issues that emerges from the content analysis of the impact that businessmen state as a consequence of the current situation is the list of inconveniences that the measures implemented by the administration entail for the management of their businesses. These inconveniences are caused by the need for companies to adapt to the new regulations, in terms of both extraordinary expenses and time “... the measures we have to adopt to minimize contagion mean more working hours and loss of days of occupation”.

To conclude the analysis of the sub-node that includes the impact at the economic level, the entrepreneurs focus their attention on the description of the evolution of reserves. Thus, it is stated that the cancellation of reservations, during and after the months of confinement imposed as a preventive measure, has had a strong economic impact that is accentuated, above all, because it occurred during the months in which the high season began; “all the reservations for the highest seasons of the year were cancelled (Easter, May long weekend, concerts, etc.)”, “I have lost the income from the dates that provide the most income for the year...”, “[in] the spring season, the best season of the year, they cancelled all my reservations” or “everything is empty until July and August”. However, when it comes to the evolution of reservations, once the legally established period of impossibility to travel has ended, some establishments state that the suitability of their accommodations, being isolated and in less crowded places, “has favored an improvement in reservations”, “a slight improvement is now beginning”, and in some cases they even state that “after the reopening, the number of reservations has multiplied due to the high demand for inland tourism...”. Again, it can be deduced that the impact cannot be equally attributed to the sector as a whole, but that there will be differences that will require further analysis in order to understand more exhaustively what the impact of this crisis has been on the sector.
is included in the “outlook” sub-node. A first approximation allows us to assess which companies have a negative vision and which have a positive one; the former are in the majority among the region’s businessmen, with a total of 29 references out of the 31 that express their opinion on this subject. Those businessmen who show a positive vision of the future evolution of the sector express that “the region will not be one of the most punished areas of Spain as soon as the interprovincial trips are resumed”, they also indicate that “a very good season is presented, since the social distancing fits the profile of isolated tourist accommodation”. For their part, those who present a negative view of future developments consider, for the most part, that the impact is such that it could lead them to close: “in my case it may be decisive to continue with the opening”, “we will all end up closing”. Others believe that a long period of recovery lies ahead, before reaching pre-crisis levels again, and a time of great uncertainty.

The hierarchical structure of nodes that emerges from the analysis of the opinions expressed by the entrepreneurs on the impact of the health crisis on their businesses can be seen in Figure 3.

### 4.2. Analysis of the Measures node

Within the thematic axis referring to Measures, it should be noted that the purpose of this axis is to collect those proposals that, from the business perspective, should be implemented by the administration in order to overcome the situation as efficiently as possible. As can be seen in Figure 4, the words “aid”, “companies” and “measures” focus much of the attention of businessmen when expressing their perception. For their analysis, a sub-node structure is proposed that divides the measures proposed by the entrepreneurs according to their nature, such as “promotion”, “regulation”, “training”, “economic”, “opening of resources” and “aid” measures. Each of the sub-nodes created, in turn, requires the construction of a sub-node structure to classify and structure the information contained in each of the aspects to be dealt with.
Thus, the “promotion” sub-node, which contains a total of 15 references, is in turn structured in four sub-nodes. It can be seen then that the request for promotion by businessmen refers mainly to the request for greater promotion of Extremadura as a tourist destination, “making the area better known in different areas”, “...as quality tourism” and exposing this message both “...on national and local TV, as well as on social networks”. On the other hand, they also state that it would be convenient to take advantage of the current situation of tourism, in which the need for isolation favors the development of alternative tourism modalities to mass tourism, to promote “tourism products from Extremadura”, such as rural tourism, ecotourism, cycling tourism, etc. In addition, they emphasize the importance of promoting the destination as a place of safe tourism, and emphasize populations or areas “free of COVID-19, populations that have not been infected throughout the pandemic”. Finally, it would be considered appropriate to promote regional tourism as a solution to allow the development of the sector while restrictions on inter-regional mobility remain in place.

With respect to the suggested “regulatory” measures, tourism entrepreneurs have expressed their perceived needs to address the current health crisis. This sub-node is in turn divided into three sub-nodes that manage to capture the information contained in their proposals in this area. Thus, on the one hand, the businessmen request that the current prohibitions to avoid contagions be replaced by “measures to be followed” to avoid them, both in the operation of the establishments themselves and also to allow visits to monuments and natural resources. On the other hand, they emphasize the need for the regulations developed to regulate the new situation to be flexible, both in the particularities of the companies and in what has to do with contagions and the overcrowding of the areas. They also request this flexibility in the rest of the bureaucracy and deadlines required to comply with the measures imposed. Finally, they ask for “clarity” in the measures to be implemented, that the regulations be “clear and credible” and that they be developed with adequate time in advance to allow them to adapt with sufficient time, so that they can know “what they will be able to do and what they will not...”, in order to develop the necessary investments to be able to comply with them.

With respect to the “training” needs that entrepreneurs consider should be developed by the administration, two sub-nodes can be distinguished. On the one hand, the request for training in “hygiene and disinfection protocols”, as well as in new technologies to be developed to achieve this disinfection, “use of ozone”. On the other hand, it is considered that it would be appropriate to receive expert advice “to make the necessary investments”, in order to adapt to the current situation while being competitive.

Most of the opinions expressed by the businessmen focus their attention on the need to develop economic measures to help companies. Thus, the “economic” sub-node gathers a total of 25 references; it is the most numerous sub-node of this thematic axis. At the same time, the “help” sub-node contains a total of 11 references among which, although it is not explicitly stated, it is clear from the context that the request is associated with financial aid, especially requested for the self-employed and small businesses. Thus, the request for financial assistance is one of the measures that receives most attention from entrepreneurs.

Within the “economic” sub-node, a hierarchical structure is established that allows the information to be grouped according to the nature of the economic aid requested. Thus, the majority of requests are centered on direct aid to companies, such as aid for cessation of activity, which is requested to be maintained until tourism activity can resume normally. It is considered that these aids are essential to avoid the closure of the companies. In addition, although in some cases they request and the receipt of loans is well appreciated, in other cases they insist that this is not the solution and that the aid should be non-refundable to compensate the deficit of income
of the companies and not to continue indebted them. In the same way, another of the measures that the businessmen suggest that would be welcome in the sector in economic matters is a reduction or discount in the taxes that they have to bear, reason why in some occasions they go so far as to request a remission of some rates and taxes. With reference to employment, they express the desire to prolong the Temporary Employment Regulation Expedients (ERTE), in order to be able to maintain the levels of employment, although “with the requirement to maintain the contract for the time stipulated”. They also request direct aid to be able to meet the extra expenses that have been incurred as a result of the health situation “ozone apparatus, masks, gel...”.

To conclude the analysis of the thematic axis Measures, the sub-node “opening of resources” is created in which are grouped those references expressed by the businessmen through which they request the opening of tourist resources, such as monuments or natural pools and the realization of events, since they consider that this “is the attraction that Extremadura can offer to attract tourists”.

Once the analysis of the Measures node has been completed, Figure 5 shows the final hierarchical structure of nodes created for this purpose. The graphical representation shows the relative importance given within the node by the entrepreneurs to each of the aspects addressed with respect to the measures requested.

4.3. Analysis of the Administration node

To conclude the analysis of the main thematic axes into which the information provided by the tourism entrepreneurs of Extremadura regarding the COVID-19 health crisis has been divided, the Administration node is created with the aim of gathering how the entrepreneurs evaluate the administrative response to this crisis. In view of the nature of the subject in question, it was decided, firstly, to divide the information on the basis of the rating given to this action as positive, negative or neutral. Once this first classification has been made, it is obtained that, of the total of 27 references coded in the Administration node, a total of 20 references give a negative rating, five references give a positive evaluation of the measures developed by the administration in the area of tourism and two references are classified as neutral, as they do not have a strictly positive or negative evaluation of them. To find out the reasons for the evaluation given, each of the sub-nodes created is analyzed independently. To find out the reasons given for the positive rating, it was decided to analyze each of the sub-nodes created. Thus, first of all, it is investigated which are the actions developed by the public administration that help the businessmen to give a positive evaluation to the administrative management of the COVID-19 health crisis. Figure 6 represents the word cloud of the sub-node of positive evaluations of the administration.
As can be seen, it is obtained that the highest frequency of words falls on the terms thanks and help. Therefore, it was decided to create sub-nodes to analyze what is expressed in relation to these topics. Thus, in the first place, it is observed that the entrepreneurs are grateful for the management carried out by the administration and for the economic, material and informative help they have received from it. They are especially grateful for the economic aid that has allowed them to "compensate for the burdens of self-employment", with which they have managed to "pay part of the fixed monthly expenses". Likewise, they are also grateful for the aids included in the sub-node "other sanitary measures", among which the disinfection of rural lodgings by means of ozone treatment stands out. With regard to those who give a neutral rating—a total of two references in which the employers do not clearly evaluate the actions of the administration as positive or negative—, on the one hand, they positively evaluate the measures adopted by the administration, but at the same time point out that they are insufficient due to the length of time the health crisis has lasted. On the other hand, they criticize the impossibility of carrying out certain actions in the administration, despite the implementation of teleworking for these matters, but at the same time they praise the freezing of administrative deadlines for carrying out other procedures.

Finally, to close the topic of the perception that tourism entrepreneurs in the region have of the actions of the administration, we analyze the sub-node that gathers the references that qualify this administrative response in a negative way (Figure 7). Thus, the negative opinion is based on the complaints underlying the measures developed by the different public administrations in relation to the management of this pandemic, which are described as insufficient, late, inadequate or contradictory.

![Figure 6](image-url) Word cloud of the positive assessment sub-node
Source: own elaboration.

![Figure 7](image-url) Word cloud of the negative assessment sub-node
Source: own elaboration.

The sub-node “contradictory” refers to the lack of information and the existence of contradictory information depending on the legislation consulted, which has led entrepreneurs to situations of high uncertainty, in which they themselves have had to decide what measures to take in order to ensure the safety of their customers. The sub-node “inadequate” includes those references in which businessmen express their disagreement with the measures adopted by the different administrations. Thus, they criticize the change of criterion in the measures adopted on the initial prohibition to lodge workers, which caused that “the economic structure has been broken and that it costs much more to start everything up again”. On the other hand, some of the measures taken, such as the disinfection of the lodgings, are also questioned, since they consider that this money could have been used in other matters, such as “reducing the tax burden” or “adapting resources so that tourists can enjoy them”. On the other hand, those who qualify the measures as late make special reference to the management of the ERTEs, which “have arrived late” and, for this reason, “...for the workers it has not been easy”; in addition, this reference also includes the mention of other aids, such as the COVID-19 loans, which are...
still waiting and they consider that “they will arrive when they are no longer necessary”. To conclude the node of negative evaluation of the administration’s response, most of the entrepreneurs qualify the response given to the health crisis as insufficient. Some businessmen qualify this response as null, non-existent or nefarious. Most of the references collected in this sub-node indicate an insufficiency of the economic measures implemented. It is considered that these aids only cover “a small part” of the fixed costs and that, although the deferral of taxes is a relief, it is not a solution to the problem, “sooner rather than later, we have had or we are going to have to assume the costs”, to which must be added that some of the measures adopted have contributed to an increase in costs. For all these reasons, some of the small companies report a feeling of abandonment on the part of the administration.

To conclude the analysis of this last thematic axis, the hierarchical map is included (Figure 8), in which the resulting node structure can be seen once all the references within the Administration node have been coded.

![Figure 8. Nodes by number of references coded in the Administration node.](image)

To finalize the analysis of the three main thematic axes into which the opinion expressed by tourism entrepreneurs in the region of Extremadura has been divided, a hierarchical map is created in which the different nodes are represented in relation to the number of references collected in each case (Figure 9). This graphical representation allows, therefore, to know the relative importance given by the entrepreneurs to each of the topics considered.
As can be seen, the topic Impact is the focus of most of the attention of the entrepreneurs of the tourism sector in Extremadura. Describing the impact that the health crisis has had on their operations, especially at the economic level, and stating their prospects for future evolution are the aspects on which the opinion of tourism entrepreneurs is focused. For its part, the proposal for Measures to mitigate the effects of the health crisis on their businesses is in second place, based on the number of references included in this node. Once again, the request is focused on the economic level; although the requests at the level of promotion, training or regulations are also important. Finally, there is the eminently negative assessment that Extremadura’s business community has of the performance of the administration.

5. Conclusions

Considering the nature of this activity, the tourism sector is postulated as one of the economic sectors most affected by the COVID-19 crisis, with a forecast fall in its worldwide gross domestic product of 2.7 trillion USD, according to the WTTC\(^{39}\). Therefore, based on the potential traditionally associated with this sector to generate wealth and employment, its recovery is essential.

The objective of this paper was to analyze, from a qualitative point of view, the perception that tourism entrepreneurs have of the COVID-19 crisis, as well as to extract some of the concrete measures proposed by them to get out of this situation. To this end, a qualitative approach is used by analyzing the opinions of the entrepreneurs, which makes it possible to identify the impact on their businesses, to list the measures they consider necessary to overcome the current situation and to qualify the response of the public administration to date.

The results of this article show that the main concern of tourism entrepreneurs is the impact this crisis has had on their businesses, especially in economic terms. Cancellations and the drop in bookings have led to a decrease in their income; a decrease that, together with the increase in expenses as a result of the sanitary measures necessary for the operation of the business in the new scenario, has kept tourism companies in a delicate situation. With respect to the actions of the administration, it should be pointed out that there is a majority opinion that qualifies it negatively, since they consider that its response has been insufficient, late and inadequate.

The most relevant part of the results obtained consists in being able to enumerate, from the business perspective, the measures they consider necessary to overcome the current crisis in the sector, which can be summarized as follows:

1. In economic matters, there is a high frequency of requests for direct aid to companies, either in the form of subsidies or non-refundable subsidies.
(2) Entrepreneurs state that they have lost most of their income and need to recover this liquidity in their businesses without increasing the level of indebtedness.

(3) Regarding tax measures, the businessmen indicate that a reduction or remission would be a good formula to compensate for the drop in income they are experiencing as a result of the reduction and cancellation of the number of reservations in their businesses. Likewise, they express the need to reduce labor taxes in order to be able to maintain employment in the new context.

(4) Regarding employment, they request that the ERTEs be maintained until the sector can return to normal operations in order to guarantee the level of employment.

(5) It is indicated that it would be advisable to increase the promotion of Extremadura as a destination in several directions. On the one hand, it is suggested that, given the suitability of the destination in the current tourist context, as it is an inland destination with a wide range of rural and nature tourism, there is an opportunity that should not be underestimated, and its promotion in the domestic market should be encouraged. On the other hand, given the low rate of contagion, in comparison with other destinations, Extremadura should be sold as a safe area, with a low rate of contagion and promoted as a COVID-19-free zone.

(6) In terms of training, it is indicated that it would be advisable to take measures to provide companies with information and training in hygiene so that they can manage their businesses in ideal conditions to avoid contagion. In the same line, expert advice is requested to guide the measures and investments to be able to continue with the activity and avoid the risk of contagion for customers.

(7) Finally, the opening of tourist resources, the resumption of events and the adoption of the necessary measures to guarantee the social distancing and safety of tourists are requested.

Many of the measures that businessmen say are necessary are in line with some of those already being implemented in the countries most affected by the virus in economic terms[^31]. Other needs, on the other hand, have not yet materialized in the different plans implemented. In any case, the measures identified through the statements made by the region’s businessmen constitute a valuable tool for tourism managers to begin to design a plan B for tourism, with which to achieve the resumption of this important activity for the Extremadura economy.

In general, there seems to be a clear distinction in the impact and repercussion that the current health crisis is having on the evolution of their businesses according to the type of accommodation. Thus, the owners of rural lodgings consider that the current tourist context may favor the exploitation of their tourist model, since the social and sanitary measures necessary to avoid contagion are more adaptable to their business model. This perception coincides with the opinion of tourists, expressed in the study developed by Chebli and Said[^29], which indicates that tourists are changing their preferences towards less crowded destinations, closer destinations, increased awareness of environmentally responsible practices and the need to know the epidemiological situation of the destination prior to their visit.

For all these reasons, it seems that both from a supply and demand perspective, it is suggested that destinations with less overcrowding, such as Extremadura, where rural tourism has a relevant weight, have a preferential position in the new post-COVID tourism context. Therefore, listening to the opinion of tourism entrepreneurs is essential to guide the action plan to be followed, so that the sector can meet the challenges posed by this new scenario.

One of the main weaknesses of the current research is that the novelty of the topic addressed prevents the comparison of the results obtained with other destinations, since, at least to the authors’ knowledge, there is no similar work from a supply perspective. The work developed by Ugur and Ak-
biyik (2020) is, as far as the authors of this research are aware, the most similar to the study proposed. In their study they perform a qualitative analysis in which they include word cloud and text mining technique, based on the comments made by travelers on the TripAdvisor platform, between December 30, 2019 and March 15, 2020. In other words, they carry out a qualitative analysis from the perspective of tourism demand, unlike the present study, which qualitatively analyzes the opinions of tourism service providers, with the intention of using the results obtained to make proposals for concrete actions to recover the tourism activity figures prior to the COVID-19 epidemic.

One of the main limitations of the present work lies in the nature of the methodology used, since the qualitative techniques prevent the generalization of the results obtained to the general population; therefore, it would be appropriate in future research to be able to design a study of a confirmatory nature.

Finally, and depending on the object of study of this research, it is considered necessary to replicate this work on a destination that presents a different tourism development model to the one analyzed, in order to be able to contrast possible differences in the impact arising as a result of the type of destination. Likewise, and given the nature of some of the differences found, in future research it would be pertinent to disaggregate the study by type of accommodation, in order to identify differentiated impacts and needs as a consequence of the new current tourism context according to the type of accommodation.

Conflict of interest

The authors declare no conflict of interest.

References

from: https://wttc.org/Research/To-Recovery-Beyond.