

At the time of writing this article that day has not yet come, not even has peeked. But that day will come, and the system that has been suddenly shutdown will be restarted. From being trapped by the problems of over-tourism, we have gone to the uncertainty of when and how we can reactivate the machinery of the world's most competitive economy in terms of tourism and that of the second most visited country in the world. It is time to start again, literally from scratch: zero tourists. We have never experienced (or even imagined) anything like this and, therefore, it is not unreasonable to think that in the travel and tourism sector there will be a before and after (in the appendix, a decalogue of reasons can be found to justify this assertion).

Despite the enormous pressure for very short-term survival that tourism companies and their professionals are facing in an extremely hostile environment, it is also imperative to be prepared for the day after and avoid an improvised way out from the current hibernation state.

Science shows us that there is a very close relationship between chaos and order, so that one leads to the other, following an endless process. Therefore, if chaos is the prelude to a new order, this means that a window of opportunity is open to rethink the tourism industry and rebuild it from a new vision more aligned with the great challenges of humanity: environmental, social, technological...It can be hoped that the demonstrated resilience of this economic activity will once again become evident, but also a change in the behaviour of governments, tourists and operators in the sector.

Based on the fact that in such a volatile world, learning capacity is the only source of sustainable competitive advantage (with its consequent translation in terms of flexibility and responsiveness), although we do not know how long the pandemic will last, I would say that there are some lessons that we can already extract:

*The importance of early detection of signals (even if they are weak) about phenomena with a high potential impact level on tourist flows and a high level of urgency in the response. In other words, a proactive culture that encourages in-depth analysis of these signals and the development of prevention protocols and contingency plans that allow a reaction as quickly as possible. This is valid for health risks, but also for any other crisis scenario, whose management should introduce reinforced regional, national and international cooperation mechanisms. If not, the tolls to be paid multiply, as we are suffering now.

*Everything is interrelated. It is not enough to think about the actions (ours and those of others), but, in a hyper-connected world, we must pay special attention to interactions. For example, the great mobility that modern means of transport have made possible, which has benefited the travel and tourism sector so much, makes infectious outbreaks move around the world just as easily: did anyone think that, in an open society and economy, would not reach us? Today more than ever, therefore, it is necessary to have a global and systemic vision of tourism, although the new version of globalization that will follow will likely be different, based on new geopolitical balances.

*Each problem has its particular context, with its corresponding dynamics, from which it cannot be separated when finding solutions. China, for so many reasons, is not comparable to Spain; Spain is

not like Italy, although we are much closer geographically and culturally. The factors that influence the same phenomenon are many and varied (demography, population concentration, the density of urban centres, living conditions, social and consumption habits, transport infrastructure, etc.), with different behaviours. Therefore, solutions must accept the problem with its complexity, which requires studying it within its specific context. For example, to tackle the recovery of international tourism, we have to be aware of the differences between destinations and between outbound markets: not all of them, in all destinations, will recover with the same speed nor will they require the same type of stimuli. The inertia to apply a generic recipe should be quarantined.

*At critical moments the company must behave, more than ever, as a good corporate citizen, helping (to the extent of its possibilities) its employees, customers, suppliers and, in general, the community of which it is part. In the tourism sector, there have been numerous examples of this behaviour, which speaks in its favour. It is a question of solidarity, but also of reputation, brand credibility and building organizations based on values that strengthen the bond with its stakeholders. In the most difficult moments is when the leaders show their true scope.

*As a manager of a tourist destination or a company in the sector, plan the way out of the crisis, involve your collaborators in the exciting collective task of recovery and, when the time comes, execute the actions of the plan on time. There will always be problems that we will neither be able to anticipate nor avoid, but what will always depend on us is the way to face them: that is our margin of manoeuvre, which we cannot abandon. To do so would be to abandon ourselves to fatalism and give up influencing our future. Even knowing that the results do not depend only on us, it is better to have a strategy than to act without it; we will not always be right, but the most important thing is to go in the right direction and learn, with humility, from the mistakes made. However, today, this strategy cannot be based solely on tourist promotion, but also on the reconfiguration of our offer in light of the new social reality derived from the covid-19 catastrophe.

Under these circumstances the greatest enemy is uncertainty. And the best way to deal with it that we know, at the management level, is through the evaluation of the possible scenarios to which the post-coronavirus can lead us.

It is easy for uncertainty to lead us to confusion, which, in turn, can lead us through two paths: that of paralysis (not knowing what to do) or that of creativity (as a way to find new ways of acting that respond to the challenges of a situation that, to some extent, the drama of the covid-19 has changed).

In a first diagnosis, two key factors that can plausibly change are the following:

*One is how governments are going to react concerning the movement of people. For example, if the Schengen area will be re-established or some restrictions will be maintained (and for how long); whether visa policies will become more restrictive; if, globally, the borders will be less porous, reversing the process of opening and international integration. In turn, these restrictions on the movement of people can be of a conjunctural nature (that is, transitory or short-term) or

structural (that is, long-term or even permanent). We will denote this factor as "Government Policy", promoter, or not, of a certain distance to have a greater sense of control.

*To this institutional type factor we can add another one of a psycho-sociological nature: how will people react, from this trauma, regarding the risks of travelling, which always existed and there will be, but which now, after this tragedy, can become greater caution (or even fear) and sensitivity regarding everything related to safety and health? We will call this factor "Tourist Behaviour", whose plausible greater caution when deciding how much, where and how to travel can also be temporary (conjunctural) or settle with a vocation of permanence (structural). It is reasonable to think that variables such as the duration of confinement and social (physical) distancing, as well as the cost in both human lives and money that we have to pay, will be decisive in this regard and will also influence political decisions.

The combination of these two factors gives rise to four possible scenarios:

| CHANGE IN | | THE TOURIST'S BEHAVIOUR (more cautious and sensitive to safety and health) | |
|---|--------------|--|---|
| | | STRUCTURAL | CONJUNCTURAL |
| THE GOVERNMENT POLICY (restrictions on the movement of people) | STRUCTURAL | Scenario 1: Reconfiguration of the sector (quantitative and qualitative) | Scenario 2: Quantitative contraction |
| | CONJUNCTURAL | Scenario 3: Qualitative change in tourism demand | Scenario 4: Return to the pre-covid-19 situation |

Starting at the end (scenario 4), if government restrictions on the movement of people were temporary and / or not significant, as well as the tourist's fears or cautions generated by the pandemic, in a relatively short time the sector would return to the pre-crisis situation.

If the corsets of the governments gradually subside but the trauma of the coronavirus settles in the mind of the tourist (apart from in his/her wallet), we would find ourselves in the scenario 3, in which the tourist demand would have changed qualitatively, with criteria in purchase decision (and therefore with attributes in products and tourist destinations) that should be reviewed.

If the behaviour of the tourist were only temporarily affected but government policies continued to slow down the flow of travellers, we would find ourselves in the scenario 2, of quantitative contraction of demand, particularly at the international level, that would alter the pre-crisis tourist flows. Domestic or shorter radius mobility would be encouraged by these policies. Likewise, although for another reason (the increased prudence of the tourist), the aforementioned scenario (3) could also feed this situation, favouring domestic or proximity tourism. In any case, it would be a demand initially limited and conditioned by the economic crisis.

Finally, scenario 1 would be the most complex, with structural changes in both government action and tourist behaviour. The sector would be called for a reconfiguration of its offer to adapt to

these quantitative and qualitative changes. That of reinventing oneself or dying would take resonance again, bearing in mind that the perception of trust that companies and destinations transmit, appeasing the fear of travelling, will be fundamental in a recovery of the tourist activity that, presumably, will be closer to U-shape (progressive growth) than V-shape (fast rebound), especially in terms of international tourism, both due to the (health and economic) situation of markets (of origin, of destination and in the route) and to the prudence in dismantling the established controls. In this regard, attention should be paid to possible reactions of tourism phobia due to the concentration of tourists; or to possible threats of social rejection depending on the origin of the tourist, while the wound of this drama is still fresh.

Be that as it may, companies and destinations will need strategies to adapt and respond to any of these scenarios (or others), in which, to be effective, the focus will have to be on the configuration of the most favourable relational web. In other words, if governments and people change their relationship with tourism, companies and destinations will be forced to change their strategies. Even within the tourism supply chain itself, new balances could emerge. For example, the union of hoteliers against some practices of some Online Travel Agencies can alter the relationship of forces in the distribution channels.

From what we are confirming in terms of the intensity of the effects of this crisis, it seems more plausible to think of structural changes than of conjunctural ones. In any case, the organizational culture (reactive or proactive) will be a fundamental variable in the response of companies, assuming the "business as usual" (with some modifications), or the need for a model change (with a speed of advance conditioned by the available resources).

In this sense, a great question mark is whether this "war" is going to leave companies in the sector (and even governments) with enough financial muscle to face the change in model brought about by the technological revolution that is underway and that advances faster than we usually think. Or perhaps competitive pressure will speed it up.

Appendix: Why does the covid-19 crisis represent a before and after? Here is a decalogue of reasons.

| TOURISM | |
|--|---|
| Before (From) | After (To) |
| More Liberalization | More Control (sanitary, capacity, distancing, etc.) |
| More Globalization | More Regionalization |
| Dynamism | VUCA (*) |
| Competition (rivalry) | Hyper-Competition |
| Creativity | Extreme Creativity |
| Flexibility & Agility | Extreme Flexibility & Agility |
| 3Ps Model of governance (Public-Private Partnership) | 4Ps Model of governance (Public-Private-People Partnership) |
| Experience | Regenerative Experience |
| Physical Socialization | Socialization with a reinforced virtual layer |
| Digitization | Robotization and Artificial Intelligence |

(*) Volatility, Uncertainty, Complexity, Ambiguity.