

Tourist Well-Being and Health Emergencies

Spanish scale





Co-Evolve4BG

Analysis of Threats and Enabling Factors for Sustainable Tourism at Pilot Scale

Touristic well-being and health emergencies Spanish scale

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OVERVIEW

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REVIEW

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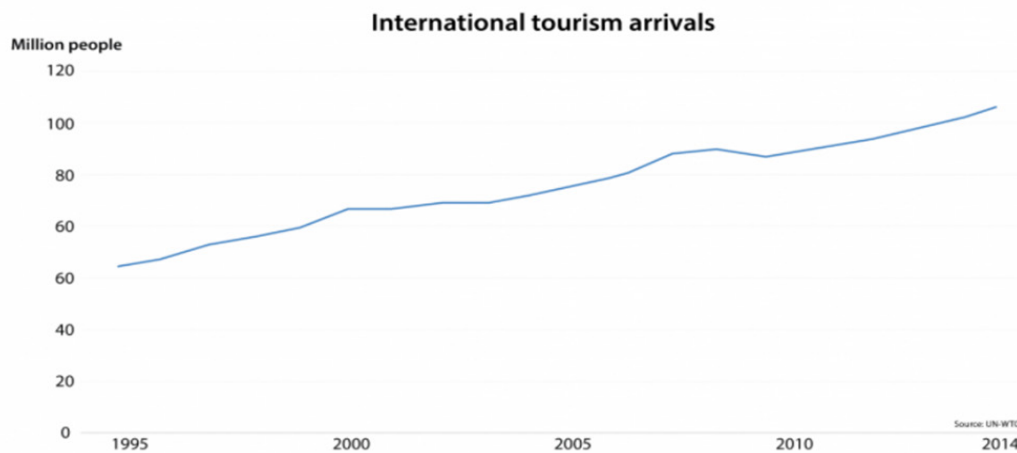
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Abstract

This report aims at describing the relevance of well-being tourism in the Spanish economy, as it was affected by the crisis caused by the Covid-19 pandemics. This document is structured as follows: the first section is a brief introduction to the economic importance of tourism worldwide. The second section describes the characteristics of health tourism and how it develops in Spain. The third section deals with how Covid-19 has affected tourism. The fourth section develops the measures related to tourism taken by the Spanish government to alleviate the effect of covid-19, and finally, the fifth section raises possible future scenarios of tourism development after the pandemics.

I. Introduction

In terms of both international and domestic tourism, the Mediterranean is the world's leading tourism destination, with more than 300 million international tourist arrivals which represent 30% of total world tourism for 2014. From 1970 (with 58 million), the international tourist arrivals have grown to nearly 314 million in 2014 and is expected to reach 500 million by 2030. About 50% of these arrivals are in coastal areas (Fig. 1) (The MAP- Barcelona Convention).



International Tourism Arrivals trends from 1995 to 2014 (Source UN-WTO)

Figure 1. International tourism arrival trends from 1995 to 2014 (UN-WTO, 2021)

The Mediterranean coastal areas receive approximately 30% of international tourist arrivals, 80% of which come from Europe, mostly from northern and western countries. Germany is the largest market, followed by the United Kingdom, France and Italy. Almost 80% of Mediterranean tourism is received by Spain, France, Italy and Greece (Fig. 2).

Due to the tourism magnitude as playing a crucial role in the region's economies; acting as a relevant source of economic growth and employment; and making a positive contribution to a country's external balance of payments.



Figure 2. International tourism arrivals in the Mediterranean countries in 2015 (UN-WTO, 2021)

In 2016, Tourism contributed to the creation of \$333.2 billion USD in the Mediterranean countries. During the last 20 years, the direct contribution of tourism to GDP in the Mediterranean region has increased by 53%. Tourism is a major pillar for the Mediterranean economies, offering consistent employment (11.5% of total employment in 2014) and economic growth (11.3% of regional GDP). In the Mediterranean basin, tourism is vital for many countries: considering exclusively coastal areas' economies, tourism represents over 70%, in terms of Production Value and Gross Value Added.

The most common tourism development model used in the region is based on seaside summer holidays and the attainment of quantitative goals. For this purpose, it is estimated to have exceeded a critical limit of coastline urbanisation with 25,000 km urbanised out of a total of 46,000 km of coastline.

Also, the visitor travel patterns have evolved: traditionally, they used to spend their holiday at the same place for a long period, but nowadays it is more common to get away more often during the year for shorter stays away from home. The relationship between the economic benefits, usually captured by large international operators, and the transformation induced social and environmental levels and destinations remain, in general, problematic. Local communities are progressively concerned with the preservation of their natural, economic and social assets from negative impacts, which may have originated from the development of facilities for tourism purposes.

Many issues have been identified in relation with uncontrolled human activities associated with the coastal tourism (The MAP- Barcelona Convention):

- Linear and coastal urbanization, consuming the precious but very limited resources of coastal areas.
- Water pollution, waste production and marine littering.
- Overconsumption of scarce natural resources (water, *etc.*), during seasonal periods (summer).

- Land degradation, biodiversity losses and decrease of the aesthetic value of landscapes.
- Greenhouse gas emissions due to energy mismanagement and inefficiencies.
- Obsolescence of 3S model, low level of competitiveness, resilience and innovation.
- Poor quality of employment generated (seasonal, low salaries, unqualified, *etc.*).
- Economic leakage, i.e., unbalanced distribution of tourism generated revenues.
- Lack of integration of sustainable tourism needs in planning for other sectors.

Furthermore, the Mediterranean Sea is one of the most important cruise areas in the world with 27 million passengers in 2013 and a sustained increase of 5% per year. Alluding to cruise infrastructures, the most of them are located on the Northern shore: 75% of Mediterranean ports are in Italy, Spain, France, Greece, Croatia and Slovenia, 9% of ports are in Turkey and Cyprus, and 7% in Northern Africa (Plan Bleu, 2017).

II. Well-preserved tourist well-being in the Mediterranean region

Health tourism describes the practice of traveling to a foreign country, looking for a medical treatment and at the same time doing activities typical of more traditional tourism. But the concept of health tourism goes beyond medical tourism, including the subsegment of wellness tourism, which is much more related to the prevention of diseases that affect the health of the tourist.

According to the definition given by McKinsey and Company (2010), health tourism is the export of health services focused on 4 specific areas (Fig. 3): curative, preventive, aesthetic and wellness medicine (Inspired Wellness); on the other hand, the World Health Organization (WHO) define Health as a state of complete physical, mental and social well-being and not only the curing of diseases or illnesses. Following these definitions, the types of services that tourists want is to include all those services that aim at the recovery, maintenance and promotion of health.

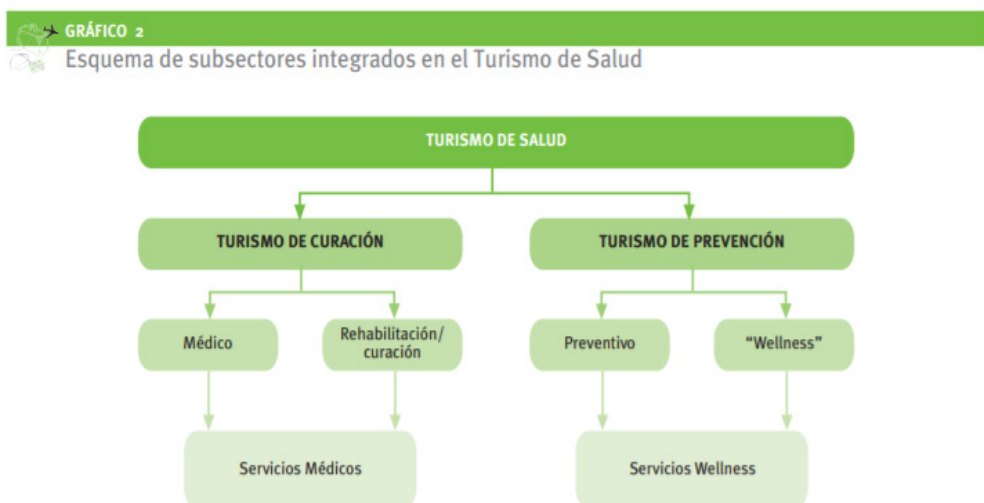


Figure 3. Diagram of Health tourism's sub sectors (Turismo de salud en España)

II.1. Favorable characteristics for tourist well-being

Based on the 2020 Strategy, the main motivation for health tourism is to maintain and/or to improve the physical and mental balance of the tourists, who usually enjoy good health, but because of their lifestyle, they need to spend time taking care of themselves and relaxing.

According to “Health Tourism in Spain” (Auren, Fundacion EOI, 2013), the health tourist’s profile is a middle-aged person, with a medium-high purchasing power who prioritizes safety and accessibility over the price. The stay is usually in a specialized establishment that has specialized equipment, services and personnel, though there is another growing demand (especially at the central- European level) looking for health prevention programs or recovery from ailments; while the tourist is on vacation. These programs combine the health’s services with the tourism’s services, including transport, travel agency, insurance company, the funding of the treatment, *etc.*

According to Smith et al. (2014), there are different types of well-being tourism:

- Spa tourism: it’s focussed on relaxation, rehabilitation and recovery using water-based treatments, like thermal pools, steam baths or sauna. In this sector, recreation tourism can be included because many people make use of these facilities for non-medical use.
- Thalassotherapy tourism: The thalassotherapy uses sea products (sea water, seaweed, salts, *etc.*) for the treatment of illnesses.
- Holistic tourism: holistic tourism is focussed on the balance of body, mind and spirit by the realization of different activities like yoga, Pilates, *etc.*
- Spiritual tourism: it’s focussed on the spiritual search, without necessarily religious connotations.
- Health tourism: it is about traveling to other countries to undergo medical treatment. Spain is considered to have the 7th best healthcare by the WHO, and the 4th country that receives more tourists, because the health tourism market is extremely important. The offer based on this kind of tourism is broad, including assisted reproduction, cosmetic and plastic surgery, cardiology, oncology.

The diversity of services associated with the idea of well-being are:

- Auxiliary aesthetic services.
- Auxiliary hairdressing services.
- Barber Shop.
- Aesthetic services of hygiene, depilation and makeup.
- Advanced tanning, makeup and waxing.
- Hydrothermal.
- Personal image
- Aesthetic care of hands and feet.
- Aesthetic massages and associated sensory techniques.
- Aesthetic treatments.

To sum up, the wide variety of offers, the quality of Spain's health care, together with the nice weather, which can be used in some therapies; turn Spain into an ideal country for the well-being of tourism.

II.2. Towards a generalization of travel medicine

According to FNCP report, 51% of health tourism business comes from European countries, while 32% comes from America. In a global view, EEUU and Germany are the most tourism-emitting countries; followed by France, the United Kingdom, the Middle East, Scandinavian Countries and Italy (Table 1). More than 80% of this business occurs at places with less than 3- hour flight (Turismo de salud en España, 2013).

According to the report "Studies of tourism products and Health Tourism" (Turespaña, 2008), 3% of the tourist flows that occur in Europe have health tourism as their main motivation, although the majority occur within the country itself, which means that health tourism receives more than 9 million Europeans per year and following the forecasts, in 2020 trips with health and well-being as motivation Will increase by 90%. According to the OECD, 1% of the population travels in search of medical assistance.

In the report "Studies of Tourist Product and Health Tourism", the data seem to be contradictory for Spain, due to the lack of sources (Turespaña, 2008). A total of 186,000 health tourists were counted, most of them from the United Kingdom, followed by Germany.

Table 1. Number of foreign health and well-being tourists in Spain by country (Studies of tourist product, Turespaña (2008))

País emisor	Turistas extranjeros en España con motivación principal de turismo de salud	%
Reino Unido	57.000	30,6
Alemania	55.000	29,6
Holanda	14.000	7,5
Irlanda	9.000	4,8
Bélgica	8.000	4,3
Francia	8.000	4,3
Suiza	5.000	2,7
Austria	4.000	2,2
Italia	3.000	1,6
Otros	23.000	12,4
TOTAL	186.000	100,0

The Department of Applied Economics of Malaga's University estimates that Health tourism left benefits of 2,300 million dollars (1,740 million euros) in Spain by 2011.

Sharing the profits, the health tourism has some negative connotations associated with the fraud committed by a few tourists like being in Spain for more than 6 months with the purpose of getting access to the Spanish health card or to go to emergency, exaggerating the symptoms of a disease. There are regulations for medical assistance in the European Union.

In Spain, however, they are left unpaid. An important part of medical assistance is provided to the tourist in addition to the cost of the tourist going to Public Health. It's expected that with the health tourism organization these losses will be removed (Turismo de salud en España, 2013).

III. Tourism and health risk effects of COVID-19

Tourism is one of the sectors mostly affected by the coronavirus disease (COVID-19) pandemic, which has impacted economies, livelihoods, public services and opportunities in every continent. According to the hypotheses of the sector, the number of international tourists could decrease between 58% to 78% in 2020, which would result in a drop in spending by these tourists from 1.5 trillion dollars registered in 2019 to between 310,000 and 570,000 million dollars in 2020. That puts more than 100 million direct jobs at risk (*Informe de políticas: la Covid-19 y la transformación del turismo*, 2020). In Spain, the negative effects on public health have been one of the most important factors around the world. Despite the good quality of Spanish healthcare, which has been weakened in the last years by budget cuts, Spain has been one of the first European countries where the Covid-19 has propagated quickly. This bigger impact is explained by the backwardness in research and development, the government delay in their response and the difficulty of coordinating with the health system of the 17 autonomous governments (García, 2020).

The impact of COVID-19 on tourism threatens to increase poverty and inequalities and disrupt natural and cultural conservation efforts. The pandemic could also slow progress towards achieving the Sustainable Development Goals (SDGs). Tourism is referred to directly in three of them: Goal 8 (Decent work and economic growth), Goal 12 (Responsible consumption and production) and Goal 14 (Life under the sea).

To accelerate recovery, it is essential to help maintain the millions of livelihoods that depend on an industry affected by months of inactivity and to create a sustainable and responsible travel experience that should be safe for host communities, workers and travelers alike. The application and communication of appropriate health and safety protocols at all levels of the journey will be essential to restore trust while ensuring the safety of travelers, workers and host communities. It will be necessary for countries to collaborate and cooperate for this end.

In addition, the necessary health and safety protocols can lead to more waste, such as masks, gloves, gowns, food containers, and other disposable protective equipment. It can also increase water consumption, which would increase pressure on water shortages and on waste management. Therefore, it is essential to adopt sustainable consumption and production models and circularity as a basis for the design, operations and supply chains of tourism to increase the efficiency in the use of resources, the production and supply of food and the use of supplies, and ensure the rational management of energy, water and waste.

While maintaining livelihoods that depend on tourism should be a priority, rebuilding the sector also offers an opportunity to transform it by paying particular attention to harnessing the effects it has on the destinations visited and creating more resilient communities and businesses through innovation, digitization, sustainability and partnerships (*Informe de políticas: la Covid-19 y la transformación del turismo*, 2020).

In order to slow down the Covid-19 infection in the touristic sector, the Spanish government has developed a series of guides. These guides explain some service specifications, cleaning and disinfection, maintenance and risk management for every sub sector of tourism.

For the health resorts, the guide establishes general requisites for all the workers, which can be summarized in avoiding the physical contact, wearing masks, frequently washing hands and disinfecting objects for personal use. Also, the guide gives instructions for every position and every spa's facility. In the same way, establishes the information that the spa must be made available to customers. (Instituto para la Calidad Turística Española (ICTE), 2020)

It is time to rethink how the sector affects our natural resources and ecosystems, building on the work that has already been done in terms of sustainable tourism; to examine how it interacts with our societies and other economic sectors; to measure its effects and manage it better; to ensure a fair distribution of benefits and advance the transition towards a carbon neutral and resilient tourism economy. A collective and coordinated response from all stakeholders can stimulate the transformation of tourism, along with economic recovery packages and investments in the green economy.

IV. Consequences of Government measures against COVID-19

Due to the pandemic, the Spanish Government ordered the alert state, on March the 14th 2020 that implied the restriction of people circulation and the enactment of containment's measures in different economic activities, especially in touristic activities.

The first measures aimed at the tourism sector, established in the Royal Decree 463/2020, which determined the suspension of hotel and restaurant activities, and only home delivery services may be exclusively provided. It has also established the suspension of the opening of museums to the public, archives, libraries, monuments and premises where public performances take place, sports and leisure activities were developed. Likewise, the "opening of all hotels and similar accommodation, tourist accommodation and other short-stay accommodation, campsites, caravan parks and other similar establishments, located anywhere in the national territory to the public, were suspended. Exceptionally, the provision of surveillance, security and maintenance services in these establishments is permitted".

However, in the Royal Decree-Law 8/2020, of March 17th, on urgent measures to deal with the economic and social impact of COVID-19, measures are established to try to mitigate the negative effects on employment, declaring essential services to certain tourist accommodations, which would remain closed to the public, but would provide service to workers who perform essential tasks such as:

- Maintenance, health care, repair and execution of works of general interest.
- Supply of agricultural and fishery products, and crews of fishing vessels, as well as complementary services to them, in the field of health, port, airport, road and rail, food, rescue and maritime safety.
- Installation, maintenance and repair of telecommunications networks and data processing centers, energy and water supply, supply and transport services of goods or passengers related to the activities allowed by Royal Decree 463/2020.
- Essential services such as security forces and bodies.
- Workers who must develop activities related to the supply of electricity, petroleum products and gas.
- Workers of critical operators of essential services provided for in Law 8/2011, of April 28th, on the protection of critical infrastructures.

All accommodation declared as essential could provide the catering service and any other service that is necessary for the right provision of the accommodation service since as an exception access to the facilities and services of cleaning and restoration was allowed to professional carriers of goods. Likewise, the provision of all services should be carried out, taking into account all the protection measures and instructions indicated by the Ministry of Health.

Due to the congestion of the ICU rooms, an order was established which allowed the rehabilitation of public or private spaces that met the necessary conditions to provide health care, giving rise to different hotels being enabled to accommodate people with COVID symptoms, hospital staff, residents in senior centers, etc. In these situations, the owner of the hotel facility assumes the services of maintenance, night security and two receptionists; while the rest of the services, such as the cleaning of rooms, is carried out by personnel designated by the competent ministry of the Community Government. Regarding the liability regime, it should be noted that the hotel staff is exempt from all responsibility for the attention and fulfillment of the obligations assumed under this order. Thus, the owner of the hotel will assume the responsibility of his own staff that works in the dependencies and in the event of damage to the facilities will be entitled to compensation. While the responsibility of the residents and social care professionals housed in it will be assumed in its entirety by the Community Government.

To address the socio-economic consequences, the Spanish Government created the Decree-Law 7/2020, of March the 12th, adopting urgent measures to respond to the economic impact of COVID-19 (*Boletín Oficial del Estado (BOE)*, 2020) and dedicates Chapter III to the articulation of a series of measures to support the tourism sector.

First, a line of financing was articulated to certain companies and self-employed workers who were particularly affected by COVID-19. Through this line, urgent measures were adopted to mitigate the effects of the opening of insolvency proceedings of the Thomas Cook business group, and its development instruments, which established a financing line of 200 million euros, managed by the Official Credit Institute and with a partial guarantee of 50% from the Ministry of Industry, Trade and Tourism, for companies and self-employed workers in the tourism sector and related activities. The financing line provided an additional €200 million to the €200 million initially planned. These help lines have been criticized by business partners for being insufficient.

Secondly, a set of measures was established to support the extension of the period of activity of workers with discontinuous fixed contracts in the tourism, trade and hospitality sectors linked to tourism activity. In these cases, a bonus may be applied in those months of 50 percent of the business contributions to the Social Security for common contingencies, as well as for the concepts of joint collection of Unemployment, FOGASA (Wage Guarantee Fund) and Vocational Training of said workers, between January the 1st and December the 31st, 2020.

Finally, it provides for the suspension, in general, without the need for a prior application and for a period of one year, of the payment of interest and repayments corresponding to the loans granted by SETUR, within the program of EMPRENDETUR. The payment of these loans will be due on the same date of the following year without interest rates.

It should be noted that the Autonomous Communities have launched a series of fundamental economic aids, in addition to the measures taken by the City Councils and Provincial Councils. Among the measures that have been taken, we can highlight the postponement of the payment of certain fees, or the elimination of some during the period of inactivity. All the facilities for entrepreneurs in the sector will be decisive for its recovery.

From its part, EXCELTUR (Alliance for Tourism Excellence) proposes five measures:

1. The postponement of the payment of taxes and Social Security contributions (deferral of fractional payments of corporation tax and adapt the calculation of its amount to the actual settlement, deferral of payment of social security contributions, deferral in the settlement and payment of VAT and postponement of regional taxes)
2. Replace returns with redeemable bonuses
3. Facilitate business liquidity by extending the amount of guarantees up to 80% of loans for all companies and raising the initial amount from 20,000 million euros to 200,000 million; apart from specific lines for airlines, hotels and tour operators.
4. Ensure the management capacity of ERTes (Temporary Employment Regulation File)
5. Facilitate the possibility of renegotiating the rentals of tourist assets, subject to adequate tourist coverage.

In short, ambitious proposals for which financing require a special effort that will not be possible without European funding (Arcos, 2020).

V. Future scenarios for tourism

Due to the complexity and uncertainty of the current circumstances, the best way to approach management is through possible scenarios to which the post-covid situation can lead us. Following the premise of Van't Klooster et al. (2006) of proposing a combination of external and internal axes for a better understanding of the studied reality, Sánchez (2020) presents scenarios to try to explain the possible future considering the following factors:

- The reaction of governments when it comes to the movement of people (whether restrictions will be maintained and for how long, for example). This in turn can have a conjunctural (short-term) or structural (long-term or permanent) character. We will refer to this factor as government policy (Table 2).
- The reaction of people to the risk of traveling, which we will call tourist behavior, based on caution when deciding how much, where and how to travel, which can also be conjunctural or structural.

Table 2. Possible scenarios for tourism (Turismo post-Covid 19: el turismo después de la pandemia global. Análisis, perspectivas y vías de recuperación)

Changes		Tourist behavior (more prudent and sensitive to security and health)	
		<i>Structural</i>	<i>Relevant</i>
Government policies (Restriction on movement)	<i>Structural</i>	Scenario 1 Sectorial reconfiguration	Scenario 2 Quantitative contraction
	<i>Relevant</i>	Scenario 3 Changes in touristic demand	Scenario 4 Back to the Pre-Covid-19 situation

In addition to these factors, the author includes variables such as the duration of confinement and physical distancing and the cost in both human and economic lives as they influence political decisions. This combination of factors gives rise to possible scenarios:

The first scenario would be the most complex since there would have been structural changes both in the action of governments and in the behavior of tourists, which would lead to a reconfiguration of the offer of the tourism sector to get adapted to these changes considering that the perception of confidence transmitted by companies and destinations will be a key issue to its recovery. Likewise, the attitude of the communities receiving tourism flows must be considered since tourism needs the complicity of residents for its development.

The second scenario contemplates an interim change in the behavior of the tourist, but structural in the governments, which would continue to slow down the flows of travelers. These policies would encourage domestic tourism, as in the third scenario, in which the situation would be the opposite: political decisions are aimed at increasing the flow of tourists, but fear and the economic crisis affect the decisions of the tourist influencing his decision to buy.

Finally, in the fourth scenario, it is contemplated that the return to the pre-covid situation, for which government decisions on the restrictions on people movement would be temporary as well as the caution with which the tourist decides upon his destination.

Whatever the scenario, if the governments and the individuals change their relationship with tourism, companies and destinations will need to change their market strategy to remain effective.

VI. Conclusions

The main conclusions are:

- Tourism is one of the greatest economic powers of the world, especially in the Mediterranean area.
- Health tourism is a very powerful niche market in Spain as long as you know how well you take advantage of the demand.
- Covid-19 has especially affected tourism activity and will probably lead to a change in the tourism model developed so far.
- To recover the tourism development that existed until now, we must bet on a more sustainable type of tourism that allows us to recover consumer confidence.

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