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SARS-CoV-2 effects on tourism. The recovery of regional complexity: When less means more: The case of Balearic Islands

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ABSTRACT

The global effects of the pandemic have had a strong impact on tourism. However, the process of transformation began earlier, with the emergence of new technologies and social and cultural changes. Covid-19 has accelerated the diversification process and increased the degree of interrelation with other sectors, creating a more plural and complex perspective. The importance of tourism in the Balearic Islands makes this region an excellent case study for analyzing the current processes of change and their disparate consequences. Against this background, tourism in the archipelago is directed to follow the tenet of 'less is more', in a clear commitment to incentivizing exclusivity as a driver of the complex regional renewal of the Balearic Islands.

In this article, after debating the paradigm shift in tourism from a qualitative perspective, we will analyze examples of changes in access to the islands and its effects on sun-and-beach tourism. Additionally, we will analyze cases that allow us to begin to define the pillars of a new, more complex view of tourism that encompasses diversification (spatial, practical and economic) and exclusivity realigned with the regional scale (Balearic). We will conclude by describing the change in the economic paradigm that points towards the enhancement of regional complexity as a guarantee of strength within the global context.

Introduction: The acceleration of an ongoing transformation

At present, it is difficult to predict the effects of the Covid-19 pandemic. However, we can already confirm that it has affected societies around the world, with impacts that range from the strictly medical to social to economic. A scientific analysis of the phenomenon is impossible while the pandemic is still in progress. However, we should not succumb to the temptation to project our own visions for the future.

The pandemic has revealed all the issues that had remained on the sidelines in the prevailing economic model. Consequently, in every region of the world, diverse problems and situations have been made evident, including demographic crises with effects on aging populations, economic deprivation in polarized societies without support, social ruptures due to the lack of commitment and cultural ruptures with the limits of individualism and even crises of a political nature with accompanying institutional crises. However, the pandemic has been nothing more than the trigger that has revealed lingering problems. For a long time, societies have avoided looking at their margins despite glimpses of the beginnings of new economic and social models resulting

from ecological and technological revolutions (Jamal & Budke, 2020). Comfort led to social conformity that resisted change, but change nonetheless suddenly arrived. The result is a much more abrupt transformation for those who resisted change and an opportunity for those who adapt to the new realities. The new perspective adopts a global, universal vision but changes the way of acting to realign with the local, sustainable scale.

The search for a certain degree of autonomy at the local level as a formula for equilibrium (by interactions) reframes the very foundations of the concept of economic development (by accumulation). From this plural perspective, diversification (economic complexity; Hausmann et al., 2014) and multiplicity (tourist practices in five categories: discovery, relaxation, sociability, gambling and shopping; Cuvelier, 1998) allow for greater adaptability. The result is the establishment of more resilient and socially reconciled societies (synecism). The paradigm shift is evident when moving from a sectoral logic that optimizes an activity to a new, integrated logic that rewards complexity. The organization of this new paradigm is based on a direct and close political organization that operates on a local scale (region); although it is not necessarily

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Table 1

Schematization of the current recent transformation of tourism, from Fordist to complexity, related to the Covid-19 pandemic.

Type of tourism/Period	Pre Transformation (-2015)	Pandemic Accelerate (2020)	Post-Transformation (2021-)
Fordist (Mass)			
Diversification (A la carte)			
Complexity? (multiple)			

Source: HCM

Source: HCM.

incompatible with the global scale, it is understood to follow a new logic arising from the advances of new technologies and virtual communication.

The Balearic case: A tourism model in crisis?

The Balearic case has the particularity of having been a nucleus of tourism development, which is understood as a single activity and where benefits would serve to expand tourism worldwide to the Caribbean and China Seas. The Balearic Islands have participated in the construction of a tourism model based on the features of the archipelago that echoes the global sun and beach tourism model.

The pandemic has thoroughly affected tourism (Correa-Martínez et al., 2020), which is the main economic activity of the Balearic Islands. The first partial statistical reports show a more than 80% loss of tourists and economic benefits, which is affecting all aspects of life on the islands. However, it is also worth mentioning that small exceptions may show the direction of the transformation of tourism in the Balearic Islands and, by extension, elsewhere. Let us not forget that the great strength of the archipelago is its role as the engine of tourism development. It has the capital and benefits necessary for a transformation, with a considerable margin of autonomy. The new tourism scenario in the Balearic Islands had been brewing for more than five years, and now, with the pandemic, it has begun to take a clear shape. It has shifted from a global mindset that acted on specific places to a new, more regional logic that is articulated more globally. This new scenario is much more suited to the particularities of the Balearic Islands because of its dimensions and insular character, as well as for its economic characteristics.

The theoretical and methodological revaluation of regional economic complexity

Tourism studies offer an interdisciplinary, plural perspective that, far from being invalidated, complements the understanding of tourism with its complexity (quantitative and qualitative) (Hiernaux, 2006; Coles et al., 2006). Certain more progressive areas of the economic sciences have begun to incorporate the epistemological and methodological legacy of the social sciences into tourism (Ryan, 2018).

Towards a complex regional model

In the epistemological context, the current situation of SARS-CoV-2 (Table 1) has only accelerated a process that was already at work within tourism as a result of the adaptation of the sector to the technological revolution (Berchin & de Andrade, 2019). Tourism, like the rest of the service sector, has been greatly affected by the use of new technologies that influence the definitions of travel and tourism (Violier, 2013). This has resulted in a more autonomous tourist who is increasingly specialized and diversified as a result of being able to design his or her own “a la carte” trip but, at the same time, is in search of exclusivity and is experimenting with the experience, such as by seeking a better guarantee of the authenticity of the memory (Duhamel, 2018). The current pandemic represents a breaking point in the tourism market, which disappears when people are forced to keep isolated. However,

isolation and confinement only reinforce people's desire for a future return to travel, given that tourism has become central to the recovery of normalcy.

From this perspective, it is expected that the volume of tourism economy will recover. It has already been possible, for example, the domestic Chinese tourist market recovered during the Golden Week 2020 when health-related restrictions were lifted. Consequently, it can be expected that the previous transformation of tourism will continue in its increasingly complex process of diversification based on multiple practices (Carr, 2002). In the current scenario, it is possible that the proportion of tourists who travel for a single purpose, such as those who purchase a package to relax in a vacation destination, may decrease. In contrast, the number of people who travel for multiple purposes will increase (i.e., those who mix tourism goals such as discovery, relaxation, sociability, gambling and shopping at the same time, to a greater or lesser extent). Surely, those traveling for what is considered within tourism as “other reasons” will become one of the groups with the greatest increase in the global market after the pandemic.

Environmental awareness, increased post-pandemic costs and the prioritization of the experience over the distance of the destination as a marker of exclusivity (e.g., a young person valuing an escape room weekend with friends in the same city more than an exotic trip) leads to complexity in tourism (Milne & Ateljevic, 2001). Consequently, tourism is diversified not only in itself but also in its relationship with other services (leisure, transportation, real estate) and as a stimulus for other economic sectors, such as agriculture (with oenology, for example) or industry (with the recovery of local production).

Consequently, post-pandemic tourism should follow the general trend that was already developing (Kozak & Martin, 2012). It can be defined as a return to previous tourism forms that offer a greater degree of autonomy, but without being narrowed down to an elite experience. The implementation of new technologies in tourism offers advances towards fields such as simulated tourism formula, which allows people to travel without leaving home. We have already found cases of visits to museums or caves with cave paintings that can only take place cybernetically. Such forms of tourism (e-tourism) tend towards simplification as a result of technology (Buhalis & Jun, 2011) and of individualization, which values the exclusivity of the experience. Tourism is reunified with its original nature by focusing more on life experience, life being understood as a *journey*. Learning to leave one's comfort zone is once again at the center of tourism.

From a geographical perspective (Lozato-Giotart, 1993; Knafou et al., 1997), this innovation contributes to put place into perspective and revalue the local scale (Edensor, 2001). Far from being contradictory, these processes complement each other: On the one hand, the concept of travel can be projected independently of place and is based instead on the desire to experiment. Thus, a trip can be completed without leaving home or crossing the planet. The emphasis shifts towards guaranteeing the ‘exclusivity/authenticity’ of the experience. From this perspective, the local scale may be revalued with respect to the previous overvaluation of the global scale of tourism. The pandemic itself has demonstrated the discovery of opportunities for new experiences without leaving one's city or region, and many times, these experiences are unknown even to the inhabitants of the region. The



Fig. 1. Balearic Islands: A culture based on tourism (<https://www.behance.net/gallery/51516179/Map-of-The-Balearic-Islands>).

growing awareness of environmental and sustainability issues, as well as the desire for fair tourism, have led to a reconsideration of regional and local scales (Teo & Li, 2003). The confinement prompted by the pandemic encouraged a process that had already begun with, for example, the development of rural tourism.

Also, social awareness and its focus on greater sustainability, together with the current effects of the pandemic, are accelerating a process of reuniting people with the region and the local scale. Slow tourism is characterized by practices that are less hostile to the environment and more integrated with local communities (Fullagar et al., 2012).

Currently, we are observing a boom in more local tourism approaches that better adapt to the diversity of demands and allow personalization. Thus, for example, hotels and more familiar accommodations are profitable again because their costs are reduced by e-commerce (reservation websites, electronic payments, computerized administrative management). The development of the tourism sector occurred at the same time as economic globalization and accompanied a new ease of exchange, but currently, a return to a local focus but using current technologies is offering new potential to tourism (Neuhofer, Buhalis, & Ladkin, 2015).

The qualitative contribution of the social sciences to tourism

The application of a social sciences perspective within tourism has allowed us to move away from an understanding of tourism as a strictly economic activity and approach it from a more complex perspective (Antón i Clavé et al., 1996). This shift in perspective has also led to the introduction of more qualitative instruments, such as surveys, interviews, fieldwork and literature, to collect valuable information of a more social and cultural nature. These data allow us to analyze the effects of the pandemic on tourism in the short, medium and long term in the absence of quantitative data and sufficient time.

Due to the immediacy of its topic, this article has focused primarily on a bibliographic compilation of some of the current trends in tourism (pre-pandemic) to determine the state of the art as well as of general news published in the specialized press. Second, regarding the analysis of the situation in the Balearic Islands, interviews and recent ethnographic work (Salazar, 2010; Richards, Munsters, Binkhorst, Castellanos-Verdugo, & Collins, 2010) conducted in the process of writing five articles - two book chapters on Ibiza (Capellà, 2018, 2020) and three articles on Mallorca (S'Arenal and Ternelles) and Ibiza - published in the scientific journal *Ongoing*. Additionally, we filled information gaps with items from the local island press and the initial incomplete statistical data on tourism in the Balearic Islands (IBESTAT). The resulting methodological approach is mixed and is based on indirect information and allows the question posed to be addressed from an interdisciplinary perspective (Berdoulay, 1998).

Development: The transformation of the tourism model

The Balearic Islands are an archipelago in the western Mediterranean composed of four inhabited islands: Majorca, Menorca, Ibiza and Formentera, in order of importance (Fig. 1). They have become one of the most important tourist destinations in Spain (the country with the second-highest number and volume of tourists in the world). In terms of the volume of tourists and capital, the Balearic Islands have recently been placed second among Spanish destinations in volume, behind Catalonia and ahead of the Canary Islands, and are third in terms of tourism expenditure (2019), despite being one of the smallest Spanish territories. With just over one million inhabitants and an area of 4,992 km² (slightly larger than Long Island), they receive approximately 13.5 million tourists annually (2019), concentrated in summer; this represents a total of 14,800 million Euros from tourism alone (36% of the islands' GDP), while many of the services provided are indirectly

associated with tourism (up to 85% of the GDP; IBESTAT, 2019). While the Fordist formula of sun- and beach-related mass tourism expanded in the islands from the 1960s onwards, inspiring the name *Balearization* (Horrach Estarellas, 2009) for the model of coastal tourism and single-activity urbanization (Pons, 2000), it is worth mentioning that there is great inter- and intra-island variety (Garín-Muñoz & Montero-Martín, 2007). The Balearic economy and society have changed in the past 50 years and have come to depend almost exclusively on increasingly international European tourism (mainly German and British tourists), a transition that has also brought about heavy dependence on air transport by the main *low-cost companies* (such as Ryanair, Vueling, Germanwings, Air Berlin, Easy Jet, Jet2com, Wizz air, Transavia and Volotea) and charter flights by large travel companies such as TUI, Condor and Thomas Cook. Economic activity on the Balearic Islands is directly or indirectly related to tourism, which generates great fragility due to the strong dependence (Butler, Vera-Rebollo, & Rodríguez-Sánchez, 2012). However, tourism is also a great asset; the islands are among the centers of development of the tourism services sector at the international level and host the headquarters of conglomerates and global reservation centers such as Globalia, Hotelbeds, Barceló, Meliá, Rius and Iberostar. Therefore, we believe that this case study allows an analysis of the transformation trends of the sector, as well as the direct impact of the pandemic, to foresee future scenarios in the short, medium and long term.

The confinement and containment measures in response to the pandemic have had a strong impact on the economy of the Balearic Islands according to the first official regional figures for July and August (high season), which show a reduction of almost 80% in tourists and income (Ultimahora, 2020). The limited access to the destination (because it is a group of islands) and the deterring health measures resulting from the generally poor control of the pandemic in Spain and in some of the countries of origin of tourists further aggravated the situation of the Balearic Islands. Unlike in other regions of the country, neither national nor inter-island tourism could compensate for the lack of international tourists and the resulting economies of scale, the former because of the insular nature of this destination and the health concerns in airports and on flights, the latter because of its small volume and short travel distances.

However, from the perspective of the transformation of tourism, we see a process that has long been in progress for both structural (since at least 2005) and economic (since 2015) reasons and to which the pandemic has contributed. From a structural point of view, tourism investors were already in the process of adapting the Fordist model in favor of a more diversified and exclusive model that includes the conversion of tourist destinations (since 2005) to adjust to new demands, the technological adaptation of the sector, and an increase in *tourismophobia* in the face of image degradation due to drunken tourists and *low-cost tourism* (Blázquez Salom, Murray Mas, & Artigues Bonet, 2011).

Among the economic trends it is worth noticing that the important British tourism market has been changing since 2015, mainly due to Brexit, and that alternative markets in the Eastern European Union countries (Poland, Slovakia, Czech Republic, Hungary), as well as in Ukraine and Belarus are emerging. Furthermore, a crisis of the Fordist model arose when the *Air Berlin hub* project in Mallorca in 2017 filed for bankruptcy (El Mundo 16/08/2017), and some of the largest tour operators (TUI and Thomas Cook-Neckermann) abandoned operations in 2019 when the *all-inclusive* market was saturated. This affected the Balearic Islands heavily, which had focused a considerable proportion of reserves on these structures when, in reality, they were no longer necessary.

We can confirm, then, that the transformation of tourism in the Balearic Islands had been anticipated for more than 15 years, and the pandemic has only accelerated and generalized changes that were previously more specific. In this sense, the Balearic case is of interest because, from the beginning of its tourism development, it has been one of the most innovative and visionary regions in the world. For example, leisure tourism originated in Ibiza in the 1960s. The Balearic tourism

model was also exported and used in the development of resorts in the Dominican Republic, Cuba, the Mayan Riviera in Mexico, Thailand and Indonesia. Tourism in the Balearic Islands was not externally driven; rather, it arose from an internal transformation that the islands themselves proposed an economic engine for the region. From that perspective, although the pandemic has had clear negative effects in the short term, in the Balearic Islands, it has provided an excuse for taking a new innovative leap towards a model that had already been brooding, one that revolves around practices (of tourism) within a complex regional economy.

This transformation is made possible primarily by existing capital for the reconversion but also by the demand guaranteed by a settled population with great purchasing power, as has been observed in the *gentrification* in certain neighborhoods in Palma, such as Sa Calatrava and Santa Catalina. It is not surprising that some island municipalities are among the cities with the highest average incomes in the country. According to data from the Ministry of Finance published in 2020 on the taxed income for the year 2018, the municipalities of Valldesza, Purpunyent, Esporles, Calvià and Andratx in Majorca, Santa Eulària des Riu in Ibiza and the island of Formentera as a whole represent some of the most expensive and exclusive destinations.

Accessibility rethought

The limitations that being an island place on economic development have been exacerbated in the current pandemic by health safety measures that restrict mobility. Son Sant Joan in Palma de Mallorca is among the Spanish airports that receive the highest volume of passengers, with numbers very close to those of Madrid-Barajas and Barcelona-El Prat. However, it is the main airport visited by *low-cost* companies and has the highest number of daily operations on some summer days, which allows its flights to be directly related to tourism, unlike those of the other two airports. Although slightly behind, the Ibiza airport follows the same model as the Palma airport.

In this context, the pandemic has exposed certain pre-SARS-CoV-2 shortcomings and, paradoxically, has led to the revaluation of other aspects. On the one hand, although the commercial flights of *low-cost* companies and charter flights disappeared, the number of *private jets* traveling to the islands increased by more than 11% (El Mundo, 10/10/2020); private flights to the islands continued even during the state of highest alarm, as was the case in Ibiza, where quarantine was necessary (Diario de Ibiza, 24/08/2020), reinforcing the image of the Balearic Islands as a refuge for the elite. Most of the *private jet* passengers were foreigners with property on the islands. Wealthy tourists came mainly from Germany, the United Kingdom, Switzerland and, to a lesser extent, Italy, France, Sweden and Spain (mainly from Madrid to Ibiza and from Barcelona to Menorca). It is worth mentioning that a similar phenomenon occurred with yachts.

These data allow us to understand a paradox in the tourism market of summer 2020. While the majority of large hotels and many chain hotels were unable to cover the costs of opening this season, luxury hotels and homes were able to cover their costs; in fact, some increased their prices due to high demand and limited supply. This situation reflects a transformative trend in tourism towards exclusivity, a shift that had already been anticipated by certain entrepreneurs.

From this new perspective, isolation and limited accessibility further reinforce the exclusive nature of the islands. *A la carte* travel and more expensive connections serve as a filter that readjusts the market to favor a smaller number of tourists who contribute more. In this way, the market also responds to growing social demands for sustainability of a sector that is considered saturated.

The situation of the (for now) transitory reduction in access by air has had two consequences. First, the gradual decrease in interisland connectivity (by air, but also by sea) in recent years has been reversed due to the lack of other available markets. In recent months, certain companies (such as Iberia and Air Europa by air and Trasmediterranean



Fig. 2. Magaluf: Conversion of a mass tourism resort to an exclusive destination Sources: Magaluf Innside Calvià Beach Hotel (<https://www.majorcadailybulletin.com/london-fair/where-stay/2019/11/04/59205/the-new-magaluf-have-you-heard.html>).

and *Balearia* by sea) have increased their flight frequencies and offered new maritime routes (such as the *direct fast ferry* between Mallorca and Formentera), changes that the island and regional authorities had been requesting for a long time but that the pressure of the tourist market had prevented.

Second, the pandemic has had a more measured impact on the decrease in maritime connectivity. While the volume of traffic linked to the transport of goods by *ferry* was maintained, there was some increase in tourist travel by sea as tourists sought more competitive prices and the possibility of traveling with their own cars (which is highly valued in times of pandemic). The recovery of regular and seasonal shipping lines increased with the pandemic, although this change had been coming for some years with the appearance of foreign shipping companies that resurrected and reinforced historical connections that had been abandoned years ago due to their low competitiveness. This is the case of the connection of the Port of Alcudia with Toulon by *Corsica Ferries* (of the Grimaldi group) starting in 2018, which opened a door to new connections with Genoa and between islands (Corsica and Sardinia) that were boosted by the current conversion of the cruise market. Additionally, the port of Alcudia in Mallorca has been relaunched as an alternative to Palma de Mallorca for reasons beyond its connection with Ciutadella (in Menorca), thanks to its direct connections with France. As a result, despite the decline in tourist numbers, tourism from France has regained second place after many years, surpassing the declining British market but remaining behind the German market (*Diario de Mallorca*, 02/02/2020).

In contrast, cruise tourism has completely disappeared in the Balearic Islands since the pandemic, a change that has had a direct effect on high-end commerce in Palma's city center (the *golden mile*, with the flagship stores of major brands such as *Louis Vuitton*, *Cartier*, *Tous* and *Zara* on Es Born and Jaume III Boulevards). The priority concentration of cruises in the city of Palma (there are few docks in other ports in the archipelago) has led to heavy dependence on cruise traffic (single activity), with controversial results. In addition to the saturation of the Port of Palma with the carrying capacity of cruises, it is worth mentioning that the peak flow of 60,000 daily cruise passengers has been concentrated in the center of a city with 400,000 inhabitants (*El Diario de Mallorca*, 13/08/2019) in recent years.

The results have been ambivalent and have led to social polarization in Palma among defenders of cruise tourism, largely merchants, and its detractors, in a growing phenomenon of rejection of tourism (*tourismophobia*). Certain social sectors warn about the need to set limits for the number of cruise passengers given the real benefit they provide during their brief stay. However, the idea that global saturation of the Balearic Islands has been reached is an overstatement because tourism is still very specific to time (summer) and place (specific destinations). The pandemic has been more than a parenthesis for reflection; it has led to a hasty transformation that has resulted in the closure of numerous businesses that survived in part due to sales to cruise passengers. The crisis affecting commercial premises has also slowed the process of rental speculation and impacted the property market in the center of Palma; the average annual decrease in Mallorca is 16% (*Ultimahora*, 17/08/2020). In conclusion, connectivity in the islands is reorienting in favor of the residents' perspective and is increasingly conceived as a means of regulating the flow of higher-quality tourism.

The crisis of the single-activity tourism model

The crisis of the sun-and-beach tourism model in the Balearic Islands (Blázquez et al., 2015) began in the 1990s with the emergence of new, competing destinations. At that time, the crisis was used by business men on the island as an excuse for initiating an innovative restructuring of the sector. Thus, the introduction of product diversification, adaptation to new technological challenges and commitment to a new strategy to improve the quality of tourism products began, with investments to increase added value. In this way, two problems were solved. First, the niche was refocused on tourism that was lower in volume (quantitatively) but provided the same or more benefits (qualitatively). Second, it allowed the islands to differentiate themselves from competing destinations (mainly Turkey, Tunisia and Egypt) by focusing on its associations with more exclusive Mediterranean destinations (such as Monaco, Côte d'Azur and the Sardinian Emerald Coast). The tourism business in turn diversified to include real estate services, namely, the sale of apartments and houses, as a speculative offering.

In this sense, the pandemic has only reinforced the need to diversify single-activity tourism using a variety of approaches, such as presenting



Fig. 3. Conversion to luxury services on the Balearic Islands: The most expensive rented villa in Spain (300,000 euros/week) is in Ibiza (<https://www.expansion.com/fueradeserie/arquitectura/2019/05/29/5cebd0c5468aeb6e338b46d7.html>).

specific island destinations for each type of tourist. However, it has also led to the expansion of diversification towards a more complex economy to ensure the adaptation of tourism itself.

Thus, we see the nuanced effects of this particular year on the traditional sun-and-beach Balearic tourist destinations (S'Arenal, Magaluf, Cales de Mallorca and Bahía de Alcudia in Mallorca and Platja d'en Bossa, Sant Antoni de Portmany and Santa Eulària des Riu in Ibiza) despite the generalized decline. It has been observed that destinations with larger hotels and those associated with large tour operators have been more heavily affected. In these cases, decisions were made to focus on one of the hotels in the chain and close the others. However, new hotels that were more local or more family oriented or that focused on more exclusive (luxury) products were better able to cover the costs of opening for the season. In some cases, luxury mansions have seen increased profits due to local tourism and paradoxically have been able to increase their prices. The pandemic has highlighted a problem already known among specialists, namely, the great dependence on external tour operators when agreeing on prices for tourist offers. The Balearic Islands, despite being an engine of world tourism, was not able to manage the joint logistics of Balearic tourism, even with regional public institutional support, as the particular interests of each group prevailed separately.

In this sense, the crisis was already evident in 2018, with the bankruptcy of one of the main international tour operators (Thomas Cook). The 2020 pandemic has only accelerated the process. The beginning of the diversification of these mass tourism destinations in the last few years (since 2005) has reduced the impact of the crisis for those who anticipated the coming change. Large groups, such as Melià, for example, opted to convert some of the seafront hotels in Magaluf (Fig. 2). Small investors launched more familiar projects with the opening of small boutique hotels (in Palma, Ciutadella) or hotels in the rural interior (on all islands). The sale of apartments, which has been used for years as a diversification approach in destinations such as Alcudia, has also reduced the effects of the pandemic, since the investment is already guaranteed and the foreign resident is already loyal.

On the other hand, diversification in the Balearic Islands has led to growing interrelation or a drift towards services in other sectors, such as real estate or leisure. From the social perspective, tourism practices are multifaceted and integrate diverse interrelated economic sectors (i.e., they are conglomerated). Thus, the sale of luxury real estate straddles tourism and the real estate sector and is only definable according to the initial capital source of the project. The complex features of the

economic fabric of tourism are interrelated and expand into other sectors; they have progressed from generating dependence to driving the diversification of other economic sectors beyond interrelated services, including the agricultural and even the industrial sector.

The transformation: towards the complexity of tourism practices

As analyzed above, the diversification of tourism starts with tourist diversification, new destinations, new ways to book vacations and complementary activities. This stage began at the end of the 1990s and led to a second stage marked by the expansion of diversification through growing interrelationships among services, tourism, transportation, real estate and leisure (Rydén et al., 2020). This stage is sometimes understood almost as a dissolution of the tourism sector itself (Pronovoat, 2008). Starting in the 2010s, the services sector has been more affected by recent technological adaptations in the tasks of logistics and administrative management, such as E-working, E-commerce and E-office, which have transformed banking, logistics and tourism services. In the Balearic Islands, the development of these service sectors has led to rapprochement, creating a true economic conglomerate with close interrelations. Thus, tourist groups such as Melià have diversified by investing in real estate, urban planning, transport and leisure. In the same way, certain international luxury real estate companies, such as Engel & Völkers, Sothebys, Bjarförs and even the real estate subsidiary of Swedbank (Fastighetsbyrå), organize trips for their clients from Sweden, Germany and the United Kingdom. The most genuine example of this type of interrelationship is found in Ibiza and focuses on leisure, with the sale of tickets for parties that include the management of accommodation and travel, including from the visitor's place of origin.

In this way, the concept of tourism is increasingly associated with the central drivers of the Balearic economy and includes a whole range of services aimed not only at tourists but at island residents and foreigners as well. This innovation roots not only in the islands but also in the reaffirmation of the conglomerate of international tourist services, such as reservation centers and other emerging sectors of E-tourism (Stamboulis & Skayannis, 2003). All of these organizations operate from headquarters in Palma. They serve to delocalize tourist activity from the destination and consequently offer a more flexibility product.

In the last decade, diversification has led to a growing specialization of products and a greater focus on exclusivity that is consistent with previous tourism approaches. It is possible to find different approaches in the same tourist destination; for example, in Magaluf, the young, all-



Fig. 4. Gentrification of Ciutat: Rialto Living .

Source: <https://www.estilopalma.com/2014/09/like-movie-star-rialto-living/>

inclusive leisure tourism in the Punta Ballena sector contrasts with the presence of the *Nicki Club*, one of the most exclusive clubs in Mallorca, or the luxury port sector Port Adriano, and in Ibiza, the *Westend* de Sant Antoni de Portmany contrasts with Santa Eulària des Riu, home of the most expensive luxury villas in the country (Fig. 3).

Sporting events, such as the *King's Cup Sailing Regatta* or the more recent *Mallorca Cycling Challenge*, along with the gradual preservation of heritage with the Cabrera National Park in 1991, the declaration of the Biosphere Reserve of Menorca in 1993 and the Declaration of World Heritage of Dalt Vila de Ibiza in 1999 and of the Serra de Tramuntana de Mallorca in 2010, are part of a commitment to the representation of a more exclusively Mediterranean quality of life.

The Balearic Islands have presented an economic image associated with luxury by attracting famous tourists, such as royalty from the Emirates, presidents and celebrities and especially new residents with high purchasing power from Northern Europe, such as Germans, Scandinavians, British, Swiss, French and Italians, who have begun to invest in various businesses on the island such as Rialto Living (Fig. 4), an old palace and theater in the center of Palma that was restored with Swedish capital and turned into a store that offers various luxury services, from clothing to decor, and includes a cafeteria, a real estate agency and even a show room. Cities such as Palma, Ibiza, Ciutadella and Maó have begun to observe the gentrification of their urban centers and certain neighborhoods, although gentrification is also occurring in rural areas such as Formentera, inland Ibiza and Mallorca, similar to the pattern observed in other Mediterranean areas, such as Tuscany or Provence. Exclusivity has become a new strategy in the Balearic Islands to reorient the market and diversify in a Monegasque-style process.

These changes have also caused processes of exclusion as a result of price speculation and rents that are higher than the average salaries. This process is affecting and expelling some of the first residents who settled decades ago, particularly the tourism workers who were among the first to come (in the 1980s), first from other regions of Spain and more recently (in the 2000s) from other countries such as Ecuador, Morocco, Romania and Italy.

The pandemic represents a third step of diversification, this time in relation to other economic sectors. The transformation of the tourism sector has caused it to take refuge, directly or indirectly, in other sectors that have traditionally been regarded as having great importance in the economy of the Balearic Islands, such as agriculture, and, to a lesser

extent, in construction and industry. This process began with the qualitative transformation of agriculture in parallel to the agro-industrial sector. The presence of ecological and sociocultural guarantees allowed improvements in the quality of the products and increases in added value as a result of growing demand. On the other hand, the economic crisis of 2010 led to a slight return to the rural world as a refuge, with the renewal of small family farms, the creation of new co-operatives and even the arrival of excess labor from other sectors, such as construction.

In general, and very particularly in the case of Mallorca, the rural interior has been revitalized. After being neglected for decades in favor of tourism, new agricultural development, stimulated in part by tourism, is revitalizing the rural parts of the islands. Thus, for example, we find the development of new quality winemaking in Binissalem and Felanitx in Mallorca and in Ferreries in Menorca, stimulated in some cases by investors from the world of tourism and by new foreign residents on the islands. Furthermore, through sales, visits to wineries and consumption in local restaurants, tourists provide a direct outlet for their products.

The case of the agricultural cooperative *Agromart* is an example of the new revitalization of Mallorca's island agricultural system through direct distribution by a chain of establishments throughout the island. *Agromart* began in 2010 and was inspired by the demand for quality local products by foreign residents. Tourism has stimulated the traditional local production of products. In addition to wine, products such as oil, olives, almonds, cheese, cold meats, lemons, oranges or sweets have experienced a recovery of production for sale to locals and tourists. All of these products are sold both in specialized gourmet stores and for tourists; they are available at airports, in special sections of "Balearic products" in supermarkets (such as *Eroski* or *Corte Inglés*) and in general stores. Thus, for example, the plant nurseries in the *Magatzem Verd* chain in Mallorca have incorporated a section for the direct sale of gourmet products from Balearic cooperatives for an exclusive clientele of residents of Palma and foreign residents. Another example of this growing economic interrelation is *Es Rebost*, a chain of traditional Mallorcan food bars that promotes mostly island products and gastronomy for a local clientele but also serves as an attraction for foreign residents and tourists.

In the 1970s, tourism and construction activities were financed with the capital of an agricultural world that was displaced; however, currently, we see how tourism is serving as an engine of Balearic

economic diversification. The pandemic is accelerating this process with the emergence of numerous family micro investments in the rural world. Thus, in recent months, the remodeling of secondary residences in towns and in the countryside to serve as primary residences for those who wish to obtain more space and avoid urban confinement has been observed. In recent years, innovations in crops have also been observed, with plantations of Paulownia (whose wood is used in the surfing industry) and tropical fruits; in Marratxí, a businessman from a local coffee roasting plant has even embarked on the creation of a coffee plantation (Ultimahora, 2020). At the same time, traditional crops such as almonds, figs and fruit are being renewed after decades of neglect.

In the Balearic Islands, tourism is beginning to be seen as the engine for restructuring towards a more diversified, more complex and less foreign-dependent economy. This revitalization affects not just agriculture but the traditional industrial fabric, which has been abandoned for decades. New strategies have emerged for the expansion of certain footwear companies, such as *Camper* in Inca and in Menorca, and of the textile sector, with initiatives such as *AdLib* fashion in Ibiza and the artisan recovery of prints of the *fabric of Llengües* and cloth and esparto grass work in Artà, to give some examples. Industries linked to construction, such as cement, quarry, brick and traditional roof tiles, have also become a new source of economic growth.

Conclusion

In this chapter, we have analyzed the evolution of tourism from the first step of diversification to the expansion towards other services and the more recent interrelations with other economic sectors. In the case of the Balearic Islands, tourism serves to drive the conversion to a complex economy (Lazoglou & Angelides, 2020) while at the same time returning to its earliest forms, becoming more autonomous and simplified as a result of technology and more integrated at the regional level, marking the return to the concept of taking a journey.

The pandemic has only highlighted and accelerated the processes, and in the case of the Balearic Islands, which are dependent on tourism, a real paradox is being experienced between islands and inland areas. Upon first analysis, the pandemic appeared to cause a crisis in the tourism sector and in the Balearic economy, which is very dependent on that sector. This was reflected in an increase in unemployment rates, the slowdown of the arrival of seasonal tourism workers and the migration of Balearic residents to other regions. However, this migratory flow was replaced by resident tourists who decided to move definitively to the Balearic Islands by transforming their second homes into primary residences to take advantage of the tranquility and quality of island life.

However, a more detailed analysis revealed factors that lead us to qualify the findings presented above. If we compare islands, Mallorca, despite its internal tourist diversification, has been more affected by the decrease in volume of tourists and business than the other islands in the archipelago. Sectors of Cales de Mallorca, and part of the Bay of Alcudia, have not opened for the tourist season, while in the Bay of Palma, exchange has remained at a minimum and has only been compensated by the exchange of services among the residents themselves. In the case of Ibiza and Formentera, a specialized focus on more exclusive tourism offerings has been able to partially compensate for the losses. In the case of Menorca, the number of tourists with second homes has helped to maintain a minimum of open activities.

Despite indirect or direct single-activity tourism on all islands, areas that are less dependent on tourism have experienced a boom in other activities. In the case of Mallorca, we find an almost unprecedented historical situation. Historically, the growth of the island has focused on tourism-related development of the coastal areas at the expense of a traditional rural interior that could not keep up. However, in the past year, the tables have turned; while some coastal areas were ghost towns during the summer season, the island interior and the city of Palma experienced a new dynamism that was difficult to explain, with the emergence of jobs and the construction of new businesses, new

Table 2

Tourism change.

Pre-SARS-CoV 2	Post-SARS-CoV 2
Mass tourism	Exclusive tourism
Mono-activity	Multi-activity
Tourism & services diversified	Economic diversification of tourism
Sectorial economy	Complex economy
Global tourism	Regional tourism
Quantitative	Qualitative
Travel	Journey

Source: HCM.

industrial buildings and renovations, mostly in the private sphere. It seems as if the island's productive fabric has emerged more now that there is no focus on tourism.

The inhibition of tourism has generated an unexpected rebound in the island economy and has triggered a process of economic rebalancing that is not just affecting the agricultural and construction sectors. There are also new approaches to domestic tourism, urban tourism and, for a more exclusive international audience, the luxury market. The first statistical data show the arrival of a lower number of tourists to the Balearic Islands who spend the same amount of money; qualitatively, but stay for much days. Because they are no longer concentrated in crowded locations, tourists have traveled more freely and have interacted more with the locals, following a tourism pattern of yesteryear that has almost been forgotten. In the case of Menorca, there have been two processes: that of more exclusive tourism, which has not been heavily affected by the pandemic, and the resurgence of the importance of the inter-sectoral economic activity that is still very active on the island (footwear and agri-food). In summary, those territories that are no longer so dependent on Fordist sun-and-beach tourism are those that have been able to use the pandemic as an opportunity to shift towards changing trends, while island destinations that are strongly anchored to mass tourism have been forced into rapid and sometimes tragic conversion.

The reunion of tourism with the archipelago

During this stormy period, the Balearic Islands took advantage of the opportunity to rediscover tourism after a long period. After decades of disagreements between the tourism sector and Balearic society, which was very critical towards tourism urbanization excesses, 'new' tourism has emerged as a dynamic and innovative instrument for the restoration of a more complex economy that is better adjusted to people's needs and allows the resumption of a certain autonomy at the regional level. It also allows the creation of a complex neotourism society. It is not about surpassing tourism to embrace posttourism (Gravari-Barbas, 2017; Jansson, 2018) or postproductivism (Cohen, 1995) since in the Balearic Islands, tourism is the economic base. Rather, this new society should be understood as a form of innovation based on the variety and quality of human resources that the islands have been able to secure as a result of tourism.

By way of synthesis, we can propose an analysis of the main aspects driving the transformation of tourism pre- and post-SARS-CoV-2 (Table 2), although the processes began before the pandemic and the only thing the pandemic did was accelerate change and highlight everything in the economic model that was no longer adequate. The application of a pluralistic and integrative vision of tourism allows for an adjustment of the economy towards balance, sustainability and long-term objectives, in a step beyond neoliberal precepts.

The Balearic Islands are an excellent example with which to analyze the transformation of tourism in the current economic context and in the face of the pandemic. At the same time, from a more general perspective, this case study allows us to reposition the role of the regional scale so that it is not inherently in opposition to the global scale. In this case, each territory becomes a tile that is part of a large, complex mosaic.



Fig. 5. Back to the journey: Hotel Formentor. .

Source: http://vidagoimagens.blogspot.com/2012_07_01_archive.html

Rediscovery of the journey

Regarding tourism, the case of the Balearic Islands leads to a rediscovery of travel based on experimentation and complex individual practices. Autonomy and freedom that had been negated have been rediscovered, and tourism has resumed the definition of leaving one's comfort zone to discover the other and oneself.

The example of the recent recovery of the *Hotel Formentor* (Fig. 5), an emblem of the earliest *grand hotel* tourism in Mallorca, serves as a metaphor for how, despite the changes, the sensations of surprise and beauty remain the same, regardless of the time period. The exclusivity of the experience will be part of our lived spaces and will feed our memories.

This transformation is illustrated by numerous people, such as the young Chinese tourist who came for one night to a party in Ibiza; the illegal Senegalese temporary worker in the 'top tier' in S'Arenal (Mallorca); the German magnate in love with the beauty of the Serra de Tramuntana who ends up settling on a farm in Deià (Mallorca); the Ecuadorian room cleaner living in Pere Garau (a neighborhood in Palma, Mallorca); the Slovakian Erasmus student who is captivated by the cosmopolitan and quiet life of Palma (Mallorca); the Argentinean 'porteña' who finds her ancestors in Felanitx (Mallorca); the retired Swiss artist living in Santa Gertrudis (Ibiza); the Uruguayan singer and entertainer in hotels in Mallorca and throughout the world; the Murcian worker who ends up marrying and settling with a Menorcan woman from Sant Lluís (Menorca); the Danish cyclist who finds the ideal landscape for his sport in the interior of Mallorca; the Moroccan cook at a hotel in Cala Millor in Mallorca; a resident of Hamburg, a tourist services agent who works for a German tour operator in the Son Castelló industrial estate (Mallorca); the Castilian soldier stationed at the national park on the island of Cabrera (Cabrera); the Colombian night watchman at a hotel in Ca'n Pastilla (Mallorca); the Swedish investor in Es Terreno (Barrio de Mallorca); the Majorcan events manager at a boutique hotel in the center of Palma; the young man from Marratxí who works in logistics at the Son Sant Joan airport (Mallorca); the Catalan archaeologist settled in Ciutadella who studies his universe in Menorca; the Polish resident in Son Vida (Palma, Mallorca), a leisure events agent for hotels in the Balearic Islands; the Granada-born drag queen who found his refuge and retreat in Palma after his artistic journey through Berlin; the Majorcan manager who was able to set up a hotel in the Mayan Riviera;

the Italian who took refuge at a trattoria in Es Pujols (Formentera); and a queen emerita who stayed increasingly longer in Marivent upon finding the Greece of her childhood (in Majorca) – all these people came as tourists but ended up being part of the richness of the territory because of its complexity. These testimonies show the sociocultural complexity of tourism from a qualitative perspective.

Tourism has contributed a wealth to the islands that can only be properly valued with time, and the pandemic has meant a return of regional economic complexity with a global mindset.

Declaration of Competing Interest

The authors declare that they have no known competing financial interests or personal relationships that could have appeared to influence the work reported in this paper.

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