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Hosting in turbulent times: Hoteliers’ perceptions and strategies to recover from the Covid-19 pandemic

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ABSTRACT

This research examines hoteliers’ perceptions and strategies in light of the Covid-19 pandemic and their predictions about an uncertain industry that has shifted attention to safety and hygiene concerns to regain guests’ trust. A cross-sectional study comprised of four assessments with hoteliers worldwide (Nstudy1 = 144; Nstudy2 = 105; Nstudy3 = 97; Nstudy4 = 66) was conducted between April and June 2020. Hoteliers’ forecasts and operating procedures were assessed in light of crisis management, providing important insights for researchers and the hotel industry. Remarkably, most of the hoteliers predict that the crisis is recoverable and believe that sales revenue will reach 2019 levels in 2021. They have implemented extraordinary recovery measures to make up for the loss of revenue caused by the crisis. From special health and safety protocols to long-term vouchers to promote reservations, strategic efforts to recover from the pandemic are ongoing.

1. Introduction

The hotel industry has been facing a massive disruption caused by the Covid-19 pandemic, which is severely impacting hotel revenues. In mid-March 2020, global travel fell drastically within less than 30 days as travel bans were imposed and air travel was shut down to stop the spread of the pandemic (World Bank, 2020). As a consequence, most hotels worldwide faced cancellations up to 100% and found themselves empty and looking to the future with uncertainty (Gössling et al., 2020). The battle to eradicate Covid-19 is a long one, and two-thirds of consumers worldwide are still pessimistic or uncertain about the effect of the pandemic in the long run (McKinsey, 2020a).

Like every crisis, the Covid-19 crisis has a cycle, where consumer needs and desires vary according to each stage. We have categorized the hotel industry response to the Covid-19 crisis cycle into four stages. The emergency began when the World Health Organization (WHO, 2020) declared the new disease a global pandemic, which caused hotel revenues to shrink drastically. Next came a period of short-term adaptation to the emergency. For instance, as European and US consumers navigated their initial response to the crisis, they slowed down their travel plans and became cautious about the location and the type of accommodation where they chose to stay, when traveling for either business or leisure (McKinsey, 2020b). Similarly, the travel industry – including airlines, the hotel industry and tourism companies – faced great market uncertainty, not only in terms of health and sanitary restrictions, but also in trying to understand consumer mindsets and concerns. The next phase was longer-term planning to adapt to changed circumstances. The hotel business recovery from this downturn now depends not only on global progress in controlling the pandemic, but also on the ability of businesses to react to a generalized constrained consumer sentiment. A fourth phase places more emphasis on planning for an eventual upturn and economic recovery – and, ideally, learning lessons for the next crisis.

The aim of this research is to shed light on hotelier perceptions across the initial stages of the Covid-19 crisis and to obtain insights about the type of crisis management strategies currently being used by the hotel industry to survive the crisis. This study starts by examining how prior crisis management research in the tourism and hospitality sectors impacted the hotel business. Second, the study identifies some of the recovery measures identified by prior researchers in this domain and some new ones adapted to the current crisis. Based on this, a survey instrument was built to analyze hoteliers’ responses during the Covid-19 crisis. A cross-sectional study was then conducted, which comprised four assessments made between April and June 2020 of hoteliers from different international property types – city center hotels, resort hotels, bed and breakfasts, and conference hotels. These four assessments...
reflect the four stages of the crisis cycle that we outlined above. The main challenges and opportunities in the current climate across the hotel industry were analyzed. The key recovery strategies employed by the hotels during the six weeks of the study were also assessed, as well as hoteliers’ recovery forecasts. To finalize, a general discussion of the four studies is presented, providing an overview of hotel’s management procedures during the initial stages of the Covid-19 crisis.

2. Research background

2.1. The impact of Covid-19 on the hotel industry

All over the world, hoteliers are sharing similar uncertainty towards the challenges they will face as a consequence of Covid-19. With guests’ fears on the rise, the hotel industry was hit by a double-digit downfall in three major metrics: occupancy rate, average daily rate (ADR) and revenue per available room (Hotels Now, 2020). According to the World Tourism Organization (WTO), in May 2020 major restrictions included a 98% decline in international arrivals worldwide (UNWTO, 2020a). The same month, hotel occupancy reached its lowest records across Europe (13%), Africa (14%), South America and Central America (15%), the USA (33%) and finally in the Middle East, Asia and Pacific region (36%) (STR, 2020).

Limited research has examined the effects of health-related calamities on crisis management in the tourism and hospitality sector, in particular the hotel industry. Most of the previous studies in this domain are country-specific (Keogh-Brown et al., 2010a, 2010b; Prager et al., 2017), while Covid-19 is likely to induce challenges on a global level (Gössling et al., 2020). In addition, information is scarce about how hotels are preparing for the upturn and recovery from a crisis that has led to millions of job losses in the tourism and travel industry (Hotels Now, 2020; Milojevic and Katsadze, 2020). Therefore, a global perspective is needed on how hotels are managing the crisis and preparing for the upturn. This research intends to bridge this gap by providing a real-life scenario based on hoteliers’ management of the crisis, assessing simultaneously their perceptions, the challenges and the opportunities affecting the industry, and its recovery globally.

2.2. Lessons learned from tourism and hospitality crisis management research

Crisis is a broad term used in the face of a disaster and the management of its consequences, preferably based on advance preparation (Boin et al., 2004). Stern, and Sundelius (2002) further argue that the term crisis is applied in all unwanted adverse situations that are difficult to control. Tourism and hospitality are one of the most vulnerable industries due to the increased number of severe natural and human-made crises that result in enormous financial loss to the sector (Kim et al., 2020; Duve et al., 2020). Despite the large number of devastating events that affect tourism activity, the tourism business cannot fully anticipate the impact of such threats (Ritchie, 2008). From a crisis management standpoint, a large number of hotels fail to predict a crisis and do not undertake any preventive measures (Wang and Ritchie, 2010). Nonetheless, crisis management is an important determinant that affects hotel sustainability (Wang and Ritchie, 2010; Jayawardena et al., 2008; Milojevic and Katsadze, 2020). Tourism crisis management involves developing measures, practices and strategies to quickly respond to crises in a way that minimizes the negative impact to guests and the tourism industry (Wang and Ritchie, 2010).

Crisis management theory has been growing in importance since some prior crises seriously affected the hotel industry (Bilić et al., 2017). Consequently, hoteliers had to learn and deal with crisis management and to develop recovery strategies that help prevent future crises. A number of crisis management frameworks have been proposed as a response to the lessons learned from prior crises. For instance, Pearson and Mitroff (1999) suggest a framework based on five pillars to deal with crisis management from detection to prevention, recovery and learning. Faulkner (2001) further developed a six-stage model for crisis management in tourism based on this framework that encompasses i.) a prevention phase; ii.) a prodromal phase – when crisis is imminent, iii.) an emergency phase – when the crisis’s effects are felt and actions are necessary to guarantee people’s safety; iv.) an intermediate phase – when the short-term needs of people have been accounted for and the reestablishment of activities start; v.) a long-term phase – when the reestablishment phase is on course and the company and its stakeholders return to the status quo before the crisis; and vi.) a resolution and feedback phase – when companies learn from the crisis and update procedures as a response.

The world is currently facing stages iii.) to v.) depending on the region of the globe. Unfortunately, most of the past research and industry specialists have focused on the prevention of crises. Very few have examined containment and recovery mitigation during and after a crisis (Barton, 1994). An additional drawback of previous studies in tourism crisis management relates to the fact that earlier crises have been largely confined to a specific geographic location – e.g., Hurricane Katrina, heat waves in Europe, Mozambique floods, a series of earthquakes and massive tsunamis, terrorism attacks and political instability (Nelson and Nesmith, 2003; Pforr and Hosie, 2008).

From a health-related standpoint, and more in line with the current research, lessons can be learned from the 2003 outbreak of Severe Acute Respiratory Syndrome (SARS). Similarly to the Covid-19 pandemic, SARS created a crisis in the city of Hong Kong (one of the most severely affected areas). As a response, hoteliers in Hong Kong set up a contingency plan to minimize the crisis (Chien and Law, 2003). Efforts were placed on the cleaning and disinfection of rooms and common areas, and the use of protective equipment including masks. Part of the quarantine measures included refusing bookings from guests arriving from highly infected countries (Lo et al., 2006). Kim, Chun, and Lee (2005), who studied the impact of SARS in the Korean hotel industry, provide additional evidence of implications for managers in the hotel industry while dealing with the outbreak. For instance, contingency plans based on hygiene protocols, and education programs for employees concerning health and safety measures, were implemented during the six months of the SARS crisis. More recently, Kim and colleagues (2020), who examined the impact of epidemic disease outbreaks (e.g., the avian and swine flu and bovine spongiform encephalopathy) on the restaurant industry from 2004 to 2016 also make a few suggestions aiming to improve financial performance during and after a health crisis. That is, firms should develop a series of strategies to communicate with different stakeholders, namely guests, since these need to be educated and informed of the practices developed by the business to ensure safety, in order to motivate them to return (Kim et al., 2020).

The micro- and the macro-level strategies implemented during or shortly after a crisis are also emphasized by Israeli, Moshin, and Kumar (2011). The authors suggest that both short and long-term strategies are essential to prepare for the upturn while surviving the crisis, emphasizing the need for action plans (e.g., marketing to domestic and international markets; development of special offer programs; marketing and promotion of new products and services) that may deal with the immediacy of the situation and help with the hotels’ recovery. The ability to react and prepare for the upturn is essential while dealing with a crisis (Yu et al., 2005). After all, the future of the hotel industry depends on how hotels are able to manage the crisis (Evans and Elphick, 2009). In summary, the crisis management literature suggests that learning from past events is essential and the hotel business should implement crisis plans before, during and after its occurrence (Coombs and Lauffer, 2018). Building on this prior research and the lessons learned from prior crises, we look into global travel market concerns, hotels’ operation procedures, and strategies used by hoteliers when managing the Covid-19 crisis. These topics include the expected consumer concerns when considering traveling and lodging, the hotels’ business recovery
expectations, the key recovery strategies used by hoteliers while managing the crisis, and the financial forecasts they take into account when preparing for the upturn.

3. Method

Across four studies, we examine hotelier perceptions regarding the challenges, opportunities and the climate across the hotel industry during the initial months of the Covid-19 crisis. The management practices employed by hoteliers from different property types and across all (star/diamond) ratings in response to the crisis are also examined.

3.1. Data collection

The data collection was conducted in partnership with a digital marketing software and hotel services provider which distributed a survey to its database of hotels via e-mail and professional social networks such as LinkedIn. Four studies were then conducted entirely online via a SurveyMonkey interface using the same survey instrument across four time periods – Study 1: last week of April 2020; Study 2: second week of May 2020; Study 3: last week of May 2020; Study 4: second and third weeks of June 2020. Participants were invited for ongoing participation during this time period.

3.2. Procedure

A quantitative survey instrument was developed using adapted scales from the crisis management literature. The survey comprised seven parts. First, we asked hoteliers about the location of their hotel, their role at the hotel and what best described their property type (city center hotel, conference hotel, resort, or bed and breakfast). Second, the impact of Covid-19 on the hotel was assessed by asking hoteliers to describe the crisis’s impact in terms of complete shutdown, major restrictions (e.g., limited flights, travel and border restrictions), and financial recovery. We also assessed the business status of the hotel – that is, when hoteliers expected to reopen (“I am confident that my hotel will reopen and take guests in…”; see Appendix A for details). The third part of the survey examined hoteliers’ perceptions about travel market concerns, all measured using a 7-point scale (1 = not at all; 7 = very much; adapted from Kim et al., 2005). We examined perceptions of hoteliers when it comes to consumer concerns, specifically health and safety precautions (“How do you think guests will rate health and safety precautions when restrictions to travel are lifted?”) and consumer budgets (“How likely do you think it is that tighter consumer budgets will be an obstacle to travel when restrictions are lifted?”). In the fourth part of the survey, hoteliers’ business recovery expectations were assessed with respect to flight capacity (“How important do you think flight capacity is for your hotel’s business to recover?”), expected average daily rate growth (“Do you think your average daily rate will increase or decrease in the next 12 months?”) and direct bookings’ impact (“How likely do you think it is that direct bookings will increase its importance over the next 12 months?”). The fifth part of the survey assessed hoteliers’ forecasts in terms of which travel segment (leisure vs. business) that they foresaw would be the first contributor to property recovery once travel restrictions were lifted for both domestic and international markets (adapted from Assaf et al., 2017). The sixth part of the survey assessed the key recovery strategies utilized by hoteliers among a set of options (“Select your number one priority in overcoming the Covid-19 crisis and preparing for the upturn”; adapted from Israeli et al., 2011). The final and seventh part of the survey examined their financial forecasts among a set of alternatives (“What is your expectation of total hotel revenue in 2020 when compared to 2019?” “When do you estimate your business will recover to the same financial position as the year 2019?”). Hoteliers were then thanked for their participation.

3.3. Results

3.3.1. Study 1: the immediate response

Study 1 was conducted in the last week of April 2020, approximately one month after the Covid-19 crisis hit major countries in Europe and caused global travel to essentially stop.

The survey covered one hundred and forty-four hoteliers from properties across the globe, mainly from Europe. Hotel properties range from city center hotels to resort hotels, bed and breakfasts, and conference hotels. More than 50% of the hoteliers are the decision-makers at the hotels (see Table 1).

The impact of Covid-19 on the hotel and business status. Results show that hoteliers identified the complete shutdown (85.4%) as the major force behind the impact of the crisis on the hotel, followed by major restrictions (12.5%), and financial recovery (2.1%). Approximately 8.3% of hoteliers’ properties were taking guests at the time of the survey, while most (64.5%) expected to reopen between June and July 2020.

Consumer concerns. To examine hoteliers’ perceptions about consumer concerns about travel, specifically regarding health and safety precautions and consumer budgets, a pairwise comparison analysis was performed. Results show that hoteliers expected health and safety to be of greater concern than tighter consumer budgets (M_health_safety = 6.64, SD = .63 vs M_consumer_budgets = 5.35, SD = 1.21; t (143) = 13.46, p < .001).

Hoteliers’ business recovery expectations. In terms of business recovery expectations, we also examined how flight capacity diverged from consumer budgets. A pairwise analysis suggests that hoteliers expected flight capacity to be of greater concern for their hotel’s business recovery than consumer budgets (M_flight_capacity = 5.56, SD = 1.55 vs M_consumer_budgets = 5.35, SD = 1.21; t (143) = 3.34, p < .001).

The pairwise differences between direct bookings and ADR growth show that direct bookings were more positively regarded by hoteliers than average daily rate growth as an indicator of business recovery (M_direct_bookings = 5.21, SD = 1.31 vs M_ADR = 2.98, SD = 1.22; t (143) = 15.89, p < .0001).

The Impact of Travel Market Segment on Property Recovery Expectations. Hoteliers’ forecasts were then assessed in terms of the segment they anticipated being the first contributor to property recovery once travel restrictions were lifted. Hoteliers selected first the domestic leisure travel segment (56.9%), followed by domestic business travel (27.1%), international leisure travel (11.1%), and international business travel (4.9%).

A one-way multivariate analysis of variance (MANOVA) was then

| Table 1 | Sample descriptives. |
|---------|----------------------|
| Region  | Study 1 | Study 2 | Study 3 | Study 4 |
| Europe  | 84.7%   | 82.0%   | 83.5%   | 81.8%   |
| North America | 8.3%   | 13.0%   | 6.2%    | 12.1%   |
| South America | 3.5%   | 2.0%    | 3.1%    | 3.1%    |
| Africa   | 2.1%    | 2.0%    | 4.1%    | 3.0%    |
| Other - Asia and Australia | 1.4%   | 1.0%    | 3.1%    |
| Role     | CEO’s/Property Owners and General Managers | 52.8%   | 63.0%   | 57.7%   | 59.1%   |
| Sales Directors, Revenue Managers, Marketing Directors, and Front Office Managers | 36.2%   | 37.0%   | 42.3%   | 40.9%   |
| Other    | 11.0%   |
| Property Type | City Center Hotels | 52.1%   | 51.0%   | 48.5%   | 47.0%   |
| Resort Hotels | 33.3%   | 31.0%   | 28.9%   | 26.0%   |
| Bed and Breakfast Hotels | 13.2%   | 18.0%   | 20.6%   | 27%     |
| Conference Hotels | 1.4%   | 2.0%    |         |         |
performed to test the impact of the expected travel market recovery segment (domestic leisure travel, domestic business travel, international leisure travel, international business travel) on our dependent variables: perceptions of consumer concerns (health and safety precautions and consumer budgets) and business recovery expectations (flight capacity, hotels’ expected ADR growth and direct bookings). Significant main effects were observed for health and safety precautions (F(1, 144) = 3.14, p < .05), consumer budgets (F(1, 144) = 2.99, p < .05), and ADR growth (F(1, 144) = 2.87, p < .05) (see Table 2). Further tests were conducted to examine differences between conditions and t-test analysis.

Health and safety precautions. Findings show that those hoteliers who anticipated the domestic business travel segment to be the first contributor to hotel recovery also expected to show a greater concern for health and safety precautions when booking a hotel, when compared to those hoteliers who selected the international leisure travel segment as the first contributor to hotel recovery (M_{domestic_business} = 6.80, SD = .40 vs M_{international_leisure} = 6.25, SD = .78; t (55) = 3.55, p = .001). When examining the domestic leisure travel segment, significant differences were found when compared with international leisure travel, also on concerns with health and safety precautions (M_{domestic_leisure} = 6.63, SD = .68 vs M_{international_leisure} = 6.25, SD = .78; t (94) = 1.96, p = .05). No other significant main differences were found between travel market recovery segment conditions.

Consumer budgets. Similarly to the previous findings, a t-test analysis showed that hoteliers expecting the domestic business travel segment to be the first contributor to hotel recovery perceived recovery to be affected more by consumer budgets’ concerns than those who selected the international leisure travel segment (M_{domestic_business} = 5.59, SD = 1.16 vs M_{international_leisure} = 4.56, SD = 1.37; t (55) = 2.84, p < 0.01). The same pattern of results was seen for the domestic leisure travel segment when compared to the international leisure travel segment (M_{domestic_leisure} = 5.36, SD = 1.18 vs M_{international_leisure} = 4.56, SD = 1.37; t (94) = 2.41, p < 0.05). No significant differences were obtained between the other travel segment conditions.

ADRs growth. When analyzing ADR growth, interesting results emerged from the t-test analysis. Within the domestic market, results show that the business rather than the leisure travel market segment was more optimistic towards hotels’ average daily rate growth (M_{domestic_business} = 3.27, SD = .98 vs M_{domestic_leisure} = 2.73, SD = 1.26; t (119) = 2.41, p < .05). That is, although the average mean score of the sample is below the scale midpoint, results indicate that the hoteliers who expected business to be the first travel market segment to recover were less likely to decrease their ADR when compared to those who expected leisure to be the first contributor to hotel recovery. Further, when examining the impact of travel market segment on ADR within the international market, no significant differences were obtained between the business and the leisure recovery segments (M_{international_business} = 3.57, SD = .79 vs M_{international_leisure} = 3.25, SD = 1.44; t (21) = .55, ns). No other differences were observed between the other conditions (see Table 2).

3.3.1.1. Key recovery strategies and financial forecasts. In respect to the major key strategies to prepare for the upturn, an unequivocal majority of the hoteliers across the different properties (see Fig. 1) prioritized special cleaning programs to accommodate consumers’ health and safety concerns. The remaining strategies, more related to marketing and sales, were also in place, although to a considerably lesser extent – namely the offer of long-term vouchers for bookings, the redesign of sales and marketing strategies to attract new markets or segments, the creation of special offers and packages, the introduction of offers and incentives around local markets to generate new bookings, the upskill of the workforce to meet future demands, and the renegotiation of distribution partnership.

In terms of financial forecasts, hoteliers across the different property types expected the crisis to severely impact hotel revenue, with approximately 61.8% of them expecting a revenue decline of more than 50% in 2020 when compared to 2019 levels. However, none of the hoteliers believed the crisis to be unrecoverable. Approximately 47% of them expected their business revenue to reach 2019 levels in 2021. The most optimistic segment were resorts and bed and breakfasts, with approximately 58.3% and 57.9% respectively expecting to recover during 2021, while only 34.6% of city center hotels expected the same (Fig. 2).

3.3.2. Study 2: the evolution of the response

Study 2 was carried out in the in the second week of May 2020. One hundred hoteliers from an international sample of hotel properties, mainly from Europe, participated in the study. Most participants were again the decision-makers at city center hotels, resort hotels, and bed and breakfasts. No conference hotels took part in this study.

The impact of Covid-19 on the Hotel and the Business Status. When asked about the impact of Covid-19 on the hotel, hoteliers still identified complete shutdown (79%) as the most cause behind the impact of the crisis on the hotel, followed by major restrictions (16%) and recovery (5%). Around 10% of the properties were already taking guests while a majority (61%) expected to reopen between June and July 2020.

Consumer concerns. Similarly to Study 1, a pairwise comparison analysis was used to examine health and safety precautions and consumer budgets’ concerns. Results show that hoteliers still perceived health and safety precautions to be of greater concern than tighter consumer budgets (M_{health_safety} = 6.41, SD = 1.0 vs M_{consumer_budgets} = 5.53, SD = 1.44; t (99) = 8.29, p < .001).

Hoteliers’ business recovery expectations. When comparing consumer budgets with flight capacity, the analysis shows that hoteliers still expected flight capacity to be of greater concern than consumer budgets (M_{flight_capacity} = 5.92, SD = 1.83 vs M_{consumer_budgets} = 5.33, SD = 1.44; t (99) = 2.79, p < .01).

The pairwise comparison differences between direct bookings and ADR growth also highlight that direct bookings were more positively regarded by hoteliers than average daily rate growth in terms of business recovery (M_{direct_bookings} = 4.84, SD = 1.48 vs M_{ADR} = 2.70, SD = 1.22; t (99) = 11.32, p < .001). These findings are aligned with those obtained in Study 1 and show that health and safety concerns, flight capacity and direct bookings were among the key concerns for hotels’ business recovery.

The Impact of Travel Market Segment On Property Recovery Expectations. Results show once more that domestic leisure travel (54%) led the trend, followed by domestic business travel (26%), international

| Table 2 | Results of the Impact of Travel Market Segment On Property Recovery Expectations. |
|---------|---------------------------------------------------------------|
| N = 144 | Domestic Leisure Travel | Domestic Business Travel | International Leisure Travel | International Business Travel | F test |
| (n = 7) | (n = 80) | (n = 16) | (n = 41) |          |
| Health & Safety Precautions | 6.63 (.68)\* | 6.80 (.4)\* | 6.25 (.78)\* | 6.71 (.49)\* | 3.14\* |
| Consumer Budgets | 5.56 (1.18)\* | 5.59 (1.16)\* | 4.56 (1.37)\* | 5.37 (1.79)\* | 2.99\* |
| Flight Capacity | 5.76 (1.71)\* | 5.98 (1.31)\* | 5.87 (1.59)\* | 6.29 (1.95)\* | 0.35 |
| ADR Growth | 2.73 (1.26)\* | 3.27 (.98)\* | 3.25 (1.44)\* | 3.97 (1.9)\* | 2.87\* |
| Direct Bookings | 5.20 (1.30)\* | 5.29 (1.38)\* | 5.13 (1.31)\* | 5.00 (1.16)\* | 0.14 |

Note: \*\*p < .001, \*\*p < .01, \*p < .05, \*p < .1; standard deviations are in parentheses; numbers in the same row with different superscripts differ significantly at p < .05.
leisure travel (14%), and international business travel (6%).

A one-way MANOVA test was again performed to examine the impact of expected travel market recovery segment (domestic leisure travel, domestic business travel, international leisure travel, international business travel) on our dependent variables. Significant main effects of travel market recovery segment were observed only for consumer budgets ($F(1, 99) = 2.98, p < .05$) and flight capacity concerns ($F(1, 99) = 2.83, p < .05$) (see Table 3).

Consumers’ budgets. T-test analysis results show that hoteliers who selected domestic business travel as the first contributor to hotel recovery showed greater concerns with consumer budgets than those who selected domestic leisure travel as the primary contributor to recovery ($M_{domestic\ business} = 6.00, SD = 1.36$ vs $M_{domestic\ leisure} = 5.00, SD = 1.39$; $t(78) = 3.04, p < .01$).

Flight capacity. In terms of flight capacity, results show international leisure travel to be more severely impacted by flight capacity concerns.

Fig. 1. Hotels’ Key Recovery Strategies in Preparing for the Upturn.

Note: Some percentages may not total 100% due to rounding; 0% represents unselected options.

* Conference hotels in this study just represent 1.4% of the total properties analyzed.

Fig. 2. Hotels’ Financial Recovery Forecast.

Table 3

|                      | Domestic Leisure Travel | Domestic Business Travel | International Leisure Travel | International Business Travel | F test |
|----------------------|-------------------------|--------------------------|-----------------------------|-------------------------------|--------|
|                      | (n = 54)                | (n = 26)                 | (n = 14)                    | (n = 6)                       |        |
| Health & Safety Precautions | 6.43 (1.11)$^a$       | 6.62 (.90)$^a$          | 6.36 (.93)$^a$             | 6.67 (.52)$^a$               | 0.35   |
| Consumer Budgets     | 5.00 (1.39)$^a$        | 6.00 (1.36)$^b$         | 5.36 (1.65)$^{ab}$         | 5.33 (1.03)$^{ab}$           | 2.91*  |
| Flight Capacity       | 5.46 (2.13)$^a$        | 6.27 (1.46)$^{ab}$      | 6.79 (.58)$^b$             | 6.50 (1.23)$^{ab}$           | 2.83*  |
| ADR Growth            | 2.61 (1.19)$^b$        | 2.46 (.95)$^b$          | 3.21 (1.58)$^a$            | 3.33 (1.37)$^a$              | 1.85   |
| Direct Bookings       | 4.91 (1.38)$^a$        | 4.65 (1.77)$^a$         | 5.00 (1.62)$^a$            | 4.67 (.52)$^b$               | 0.25   |

Note: $***p \leq .001$, $**p \leq .01$, $*p \leq .05$, $^p \leq .1$; standard deviations are in parentheses; $^a$ numbers in the same row with different superscripts differ significantly at $p < .05$. 

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than domestic leisure travel ($M_{\text{international leisure}} = 6.79$, $SD = .58$ vs $M_{\text{domestic leisure}} = 5.46$, $SD = 2.13$; $t (66) = 2.30, p < .01$).

3.3.2.1. Key recovery strategies and financial forecasts. When asked about key recovery strategies, responses from hoteliers across the property types were more homogeneous than in Study 1. On average, special cleaning programs to accommodate consumers’ health and safety concerns continued to be a priority, followed by the creation of special offers and packages to generate new bookings, shaping offers and incentives around local markets, and redesigning sales and marketing strategy (see Fig. 3).

Financial forecasts. As more properties were preparing for the upturn and moving toward a recovery stage, the outlook on the climate faced by hoteliers was generally positive, with 18.6% of the properties already open and 59.8% mentioning that they were planning to reopen before 2021 levels in 2021. The most optimistic were those hoteliers from the city center hotels, with 68.6% expecting to recover financially in 2021, an increase of 34 percentage points from Study 1 (see Fig. 4).

3.3.3. Study 3: longer-term adaptation

Study 3 was carried out in the last week of May 2020, four weeks after the first study was conducted. Ninety-seven hoteliers from different hotel properties – city center hotels, resort hotels, bed and breakfasts, and conference hotels – participated in the study. Similarly to the previous two studies, the international sample of hotels comes mainly from Europe, and most hoteliers are the CEOs or the decision-makers at the hotel. Although all hoteliers said their properties continued to be greatly affected by the crisis, they were positive, with 18.6% of the properties already open and 59.8% mentioning that they planned to reopen between June and July 2020.

The impact of Covid-19 on the Hotel and the Business Status. Similarly to Study 1 and 2, hoteliers identified complete shutdown (74.2%) as the major cause behind the crisis impact on the hotel, followed by major restrictions (18.6%), and an increasing percentage perceiving a positive impact due to recovery (7.2%).

Consumer concerns. A pairwise comparison analysis was again performed. Results show that hoteliers still perceived health and safety precautions to be of greater concern than tighter consumer budgets ($M_{\text{health safety}} = 6.45$, $SD = .75$ vs $M_{\text{consumer budgets}} = 5.18$, $SD = 1.37$; $t (96) = 89.16, p < .001$).

Hoteliers’ Business Recovery Expectations. When examining the differences between consumer budgets and flight capacity, the pairwise comparison analysis indicated that hoteliers still expected flight capacity to be of greater concern than consumer budgets ($M_{\text{flight capacity}} = 6.08$, $SD = 1.32$ vs $M_{\text{consumer budgets}} = 5.18$, $SD = 1.37$; $t (96) = 5.35, p < .001$).

The pairwise differences between direct bookings and ADR growth showed once more that direct bookings were more positively evaluated by hoteliers than average daily rate growth in terms of business recovery ($M_{\text{direct bookings}} = 5.32$, $SD = 1.22$ vs $M_{\text{ADR}} = 2.89$, $SD = 1.33$; $t (96) = 14.57, p = .000$). Consistent with the previous studies, results showed that health and safety concerns, flight capacity and direct bookings were still among the leading concerns and priorities among hoteliers when preparing for the upturn.

3.3.3.1. The impact of travel market segment on property recovery expectations. Similarly to Study 1 and 2, the domestic leisure travel segment (49.5%) was rated as the greatest recovery contributor, followed by domestic business travel (27.8%), international leisure travel (18.6%), and, lastly, international business travel (4.1%).

One-way MANOVA results showed significant main effects of travel market segment only on the dependent variables flight capacity ($F(1, 96) = 6.01, p = .001$, and ADR growth ($F (1, 96) = 2.90, p < .05$).

Flight capacity. The t-test analysis showed domestic business travel to be of greatest concern among hoteliers when thinking about flight capacity constraints, when compared to domestic leisure travel ($M_{\text{domestic business}} = 6.33$ vs $M_{\text{domestic leisure}} = 5.58$, $SD = 1.50$, $SD = 1.11$; $t (73) = 2.27, p < .05$) or international leisure travel ($M_{\text{international leisure}} = 6.83$, $SD = .38$; $t (64) = 3.48, p = .001$).

ADR growth. The main effect of the travel market segment for ADR growth shows that hoteliers who believed domestic leisure travel to be the first contributor to recovery were more positive towards ADR growth than those who selected domestic business travel ($M_{\text{domestic leisure}} = 3.19$, $SD = 1.39$ vs $M_{\text{domestic business}} = 2.52$, $SD = 1.19$; $t (73) = -2.10, p < .05$). However, when examining differences within international travel, those hoteliers who believed the international leisure travel would be the first contributor to recovery were marginally more negative towards ADR increasing when compared to those who selected international business travel ($M_{\text{international business}} = 3.75$, $SD = .50$ vs $M_{\text{international leisure}} = 2.44$, $SD = 1.25$; $t (73) = 2.03, p = .056$) (see Table 4).

3.3.3.2. Key recovery strategies and financial forecasts. Similarly to Study 1 and 2, major key recovery strategies were being prepared by hoteliers for the upturn. While the emphasis that was put on special cleaning

![Fig. 3. Key Recovery Strategies in Preparing for the Upturn.](image-url)
Note: Some percentages may not total 100% due to rounding.
programs was reduced across all property types, most were investing substantially in marketing and sales strategies to attract new markets or segments, or in the creation of special offers and packages. Offers and incentives were also introduced to the local market to generate new bookings, as a strategy to appeal to the domestic travel market. The upskilling of the workforce to meet future demands gained relevance especially among resorts, bed and breakfasts and conference hotels (see Fig. 5).

In terms of financial forecasts, hoteliers were pessimistic regarding 2020, with 83.0% of city center hotels, 75.0% of bed and breakfasts and 57.1% of resorts expecting over 50% revenue decline compared to 2019. However, hoteliers appeared to be optimistic concerning the timeline of properties’ financial recovery, with 60% of bed and breakfasts expecting business to recover to 2019 levels in 2021, while 55.4% of city center hotels and 53.6% of resorts expect revenue will recover to 2019 levels in 2021 (see Fig. 6).

3.3.4. Study 4: preparing for the future

Study 4 was run in the second and third weeks of June 2020, six weeks after Study 1 was conducted. According to the UNWTO World Tourism Organization barometer (UNWTO, 2020b) the travel and hospitality sector began to restart in June 2020 in some Northern Hemisphere destinations while some travel restrictions remained in place.

This survey was conducted with sixty-six hoteliers from hotel properties across the globe, mainly in Europe. As in the previous studies, most participants are Group CEOs or decision-makers at city center hotels, bed and breakfasts, and resort hotels. As in Study 2, no conference hotels participated in the survey.

The impact of Covid-19 on the Hotel and the Business Status. The sentiment across hoteliers was more positive, although the majority still identified complete shutdown (68.2%) as the major cause behind the crisis impact on the hotel, followed by major restrictions (22.7%), with 9.1% noting positive impacts of recovery. Over 50% of the hotels had already reopened while 25% planned to reopen in July.

Consumer concerns. Similarly to Studies 1, 2 and 3, a pairwise comparison analysis was performed, showing that hoteliers continued to perceive health and safety precautions as more important than consumer budgets (Mhealth_safety = 6.41, SD = .86 vs Mconsumer_budgets = 5.18, SD = 1.14; t (65) = 7.54, p < .001).

Hotellers’ Business Recovery Expectations. The pairwise comparison analysis continued to indicate that flight capacity was of greater concern than consumer budgets (Mflight_capacity = 6.23, SD = 1.25 vs Mconsumer_budgets = 5.18, SD = 1.14; t (65) = 5.33, p < .001).

Direct bookings were also more positively evaluated than ADR growth by hoteliers as factors in their recovery (Mdirect_bookings = 5.29, SD = 1.19 vs MADR = 3.02, SD = 1.40; t (65) = 10.94, p < .001).

The Impact of Travel Market Segment On Property Recovery Expectations. Similarly to the previous three studies, the domestic leisure travel market (43.9%) was perceived to be the first contributor to property recovery by hoteliers, followed by domestic business travel (19.7%) and international leisure travel (19.7%) in equal measure, and lastly the international business travel market (16.7%).

A one-way MANOVA was again performed and results show a non-significant main effect of travel market segment on consumer concerns (health and safety precautions and consumer budgets) and on business recovery expectations (flight capacity, hotel’s expected ADR growth and direct bookings). These findings show that hoteliers’ perceptions towards the aforementioned dependent variables became more
homogeneous across all travel markets as the recovery progressed (see Table 5).

3.3.4.1. Key recovery strategies and financial forecasts. Interestingly, in Study 4 the key recovery strategies used by hotels were more balanced across the three property types with the creation of special offers and packages, as well as redesign of sales and marketing strategies gaining more relevance (see Fig. 7). This may be an indication of why no significant differences were observed when examining the impact of travel market segment on consumer concerns and business recovery expectations, since hoteliers across all property types were behaving similarly when preparing for recovery.

In terms of financial forecasts, a staggering increase in the percentage of hoteliers who expected their hotels to recover to 2019 levels in 2021 was verified across all property segments in just two weeks: 74.2% of city center hotels, 72.3% of bed and breakfasts and 58.8% of resorts expected to recover to 2019 revenue levels in 2021 (see Fig. 8).

Table 5
Results of the Impact of Travel Market Segment On Property Recovery Expectation.

|                  | Domestic Leisure Travel | Domestic Business Travel | International Leisure Travel | International Business Travel | F test |
|------------------|-------------------------|--------------------------|-----------------------------|-------------------------------|--------|
|                  | (n = 29)                | (n = 13)                 |                             |                               |        |
| Health & Safety Precautions | 6.38 (.90)*           | 6.31 (.86)*              | 6.46 (.97)*                 | 6.55 (.69)*                   | 0.17   |
| Consumer Budgets | 5.03 (1.09)*            | 5.23 (1.24)*             | 5.00 (1.41)*                | 5.73 (6.5)*                   | 1.14   |
| Flight Capacity  | 6.00 (1.60)*            | 5.77 (1.01)*             | 6.85 (.38)*                 | 6.64 (6.7)*                   | 2.52   |
| ADR Growth       | 3.24 (1.33)*            | 3.00 (.92)*              | 3.00 (1.63)*                | 2.45 (1.41)*                  | .84    |
| Direct Bookings  | 5.48 (.95)*             | 5.15 (1.21)*             | 5.08 (1.32)                 | 5.18 (1.60)*                  | 0.47   |

Note: ***p ≤ .001, **p ≤ .01, *p ≤ .05, "p ≤ .1; standard deviations are in parentheses; numbers in the same row with different superscripts differ significantly at p < .05.
4. General discussion

This research analyzes the impact of the Covid-19 crisis on the hotel industry. Across four studies conducted between the end of April and June 2020, we analyze how an international pool of hoteliers from different property types (city center hotels, resorts, bed and breakfasts, and conference hotels) are dealing with hotel crisis management. As travel restrictions and lockdowns are being lifted in some parts of the world, especially in the Northern hemisphere, hoteliers around the globe are making efforts to understand the major consumer concerns and business recovery expectations when preparing hotels for the upturn. Identifying the major key recovery strategies and being able to forecast the major financial constraints impacting the business in the short and long term has never been so crucial for the hotel industry (Wang and Ritchie, 2010; Jayawardena et al., 2008; Milojevic and Katsadze, 2020). Findings from our four studies therefore provide important insights for researchers and the hotel industry in dealing with an unprecedent crisis, especially the need for predictions and consumers’ travel motivations and factors (e.g. sales and marketing strategies) that contribute to the performance of hotels when dealing with a crisis (Hao et al., 2020). Study 1 and 2 show the immediate and evolution of the response of hoteliers to survive the crisis. Study 3 shows the long-term adaptation of hotels to new measures and operating procedures to prepare for the upturn, while Study 4 shows how hoteliers are preparing for the future.

The Impact of Covid-19 on the Hotel and the Business Status. While towards the end of June 2020 (end of Study 4) hoteliers still identified complete shutdown as the major force behind the impact of the crisis on the hotel, a 17.2 percentage-point decrease in this factor was verified since the first study was conducted. As the crisis progressed, this decrease gave way to other forces impacting the hotels’ business from Study 1 to Study 4. Namely, we found a 10.2 percentage-point increase in major restrictions and a 7 percentage-point increase in financial recovery expectations. Likewise, as hoteliers navigated through the crisis, a gradual increase in the percentage of Fig. 7. Hotels’ Key Recovery Strategies in Preparing for the Upturn.

Note: Some percentages may not total 100% due to rounding; 0% represents unselected options.

Fig. 8. Hotels’ Financial Recovery Expectations.
properties that opened their doors or planned to open doors between June–July 2020 was also verified, showing hoteliers’ optimism throughout the timeline of events.

### 4.1. Consumer concerns and hoteliers’ business recovery expectations

Overall hoteliers perceived health and safety precautions to be of great concern to consumers. Business-wise, flight capacity constraints and average daily rate growth were thought to greatly impact the recovery of the hotels. Direct bookings, however, were regarded more favorably, showing that a direct contact between the hotel and its guests seems a valuable relationship to be taken into account to strengthen the business.

The Impact of Travel Market Segment on Property Recovery Expectations. Although the domestic leisure travel market was the segment hoteliers most anticipated as a contributor to their recovery, it kept decreasing in importance across the four studies, revealing a 13 percentage-point decrease since the first study (see Fig. 9). A similar pattern was observed for the domestic business travel segment, showing a 7.4 percentage-point decrease from Study 1. The international leisure and business travel segments, however, showed a steady increase, of 8.6 and 11.8 percentage-points, respectively, from Study 1–4. This finding seems to indicate that while complete shutdown and major restrictions were being lifted, hoteliers became more optimistic toward the international travel segment for their property recovery.

Interestingly, when analyzing the impact of travel market recovery on consumer concerns (health and safety and consumers’ budgets) and on business recovery expectations (flight capacity, average daily rate growth and direct bookings), we were able to unveil some of the factors that concerned hoteliers the most. For the first two studies, among those hoteliers who anticipated that domestic business travel would be the first contributor to property recovery, health and safety precautions and tighter consumer budgets were perceived to be consumers’ greatest concerns when traveling. Domestic business travel was also seen as more promising than domestic leisure travel in terms of ADR growth, which is understandable since most households worldwide were stuck at home, probably without (family) vacation plans. However, this pattern changed as the crisis evolved. For instance, in Study 3 we found an increase in ADR growth expectations for both domestic leisure travel and international business travel. This is likely to be due to the fact that, globally, most of the workforce was working remotely from home, and thus slowing down their business traveling domestically. Nevertheless, as international travel restrictions were being lifted, international business travel also gained more relevance in terms of ADR growth expectations. The easing of international travel restrictions may have enhanced hoteliers’ concerns about flight capacity. This may justify the fact that, overall, the international (leisure and business) travel segment was more severely impacted by flight capacity concerns than the domestic (leisure and business) travel segment. These differences between international travel and domestic travel on flight capacity concerns also emerged in Study 4. Specifically, when running an extra analysis and examining the impact of (leisure and business) domestic travel versus (leisure and business) international travel on flight capacity concerns, a significant main effect emerged ($M_{\text{domestic}} = 5.93, SD = 1.44$ vs $M_{\text{international}} = 6.75$, $SD = .53; F(1, 66) = 7.23, p < .01$). These results confirm hoteliers’ flight capacity concerns when thinking about the international rather domestic travel as a primary contributor to recovery. When examining expectations about the impact of (domestic and international) leisure versus business on flight capacity concerns, no significant differences were observed.

Key Recovery Strategies and Financial Forecasts. As hoteliers were working 24/7 to prepare for the recovery, a number of key recovery strategies related to sales and marketing were put in place. Among these strategies was the emphasis that was placed on health and cleanliness protocols across all property types, to guarantee guests’ safety. This measure is in line with some of the procedures discussed in prior studies examining crises related to outbreaks of infectious diseases (Chien and Law, 2003). Unlike prior studies, however, this research shows that the tourism and travel industry implemented training and new certification programs in the local markets (e.g., Safe Travels in the US, Clean & Safe in the Portuguese market) to promote domestic demand (Travel & Leisure, 2020). In just six weeks, the intense work led by hoteliers to recover from the Covid-19 crisis is indeed notable. In spite that initial findings show a significant emphasis on the priorities related with the launch of cleaning programs to mitigate the uneasiness of consumers as the crisis progressed, such effect decreased in importance in the consecutive three studies. That is, a shift was made in attempts to initiate business recovery as seen in the weight placed on the introduction of offers and incentives around local markets and the creation of special offers and packages to generate new bookings across all property types. The offer of long-term vouchers for bookings, the renegotiation of distribution partnerships and the upskilling of the workforce to meet future demands were additional strategies used by hoteliers to recover from the crisis. In terms of financial forecasts, even though hoteliers were pessimistic in the short term and expected a revenue decline of more than 50% in 2020 when compared to 2019, almost all hoteliers were positive about the future and felt confident that revenue would recover to 2019 levels in 2021 (Fig. 10).

### 4.2. Implications for the future of the hotel industry and limitations

Living an unprecedented era where millions of jobs and businesses are expected to be lost in travel and tourism, this research was among the first to analyze how hoteliers across the globe managed the crisis during its initial stages. With this research, we contribute to the body of literature on crisis management in the hotel industry (Boin et al., 2004;
Pforr and Hosie, 2008; Wang and Ritchie, 2010; Yu et al., 2005) in light of an outbreak of a highly contagious disease. Some strategies have been discussed in prior studies related with the need to have more information about sales and marketing tactics and education programs involving different stakeholders (Kim et al., 2020). We are amongst the first to report some of the strategies used and the lessons learned from hoteliers at a global scale and at an historic moment in time. This is also in line with a call from prior research about the need to plan a cover that shows both preventive and reactive measures during crisis and post-crisis full recovery (Yu et al., 2005).

We acknowledge that different samples were used across the four studies, which could have led to some divergence in our results. However, providing hoteliers with the possibility of ongoing study participation is likely to have contributed to a greater consistency in the results while also contributing to understanding how they managed the crisis while it evolved. The decreasing sample of participants from Studies 1–4 is a manifestation of this situation, where managers most likely became busier while preparing for the upturn and might have been less available to participate in the studies. We also acknowledge that most of our samples are European-based, which may have provided a less heterogeneous perspective of how hotels are dealing with the crisis in other parts of the world. For instance, in the Southern hemisphere, Brazil has been amongst the hardest hit by Covid-19 in the world. The inbound tourism is a dominant source of revenue for the country. It is urgent that Brazil finds new strategies to attract tourists. One possible way is to promote its nature base tourism (e.g., eco-tourism) that allows domestic and foreign tourists to escape from urban areas that are currently associated with strict measures due to Covid-19 while helping local communities. The fact is, the Covid-19 pandemic brought the travel industry to a stand-still worldwide.

Hoteliers, as central players in the travel industry have been challenged to prepare for the upturn with limited time and information. These are living lessons that are likely to serve as benchmarking examples for the future, showing that hoteliers’ resilience during this crisis will probably maintain a viable hospitality industry. This series of studies shows that, while in the beginning of the crisis there was some divergence on the steps required for demand to come back, in a very short time (six weeks), we have seen hoteliers think more alike. What the future holds is still uncertain, especially as a second wave in fall 2020 is a reality. Although the main goal of this research was to examine how hoteliers from different property types perceived, reacted to the Covid-19 crisis and prepared the recovery, future studies could further examine differences between hotels with different star/diamond ratings. This form of categorization is common in several countries and could provide another interesting segmentation analysis of the recovery.

As travel restrictions are being lifted with caution and more recovery strategies are being adopted, one critical area is innovation. Ward and colleagues (2001) state that innovation can’t stop the spread of a disease; however, it can mitigate the effects. Following a new trend for social distancing during the check-in processes, hotels can also find a new opportunity to maximize customer value by implementing solutions based on technology (Hao et al., 2020), that will avoid the unpleasant experience of a crowded check-in encounter even after the pandemic is over (Cheong et al., 2017; Forgacs and Dimanche, 2016; Kokkinou and Cranage, 2013). Facilitating chat-based guest services and encouraging direct bookings with free cancellation policies are additional technological solutions that may aid the hotels’ recovery while mitigating risk concerns. More studies are needed to evaluate the progress of the crisis and to understand additional opportunities and challenges to hotels around the world. These are living lessons that are likely to serve as benchmarking examples for the future, showing that hoteliers’ resilience during this crisis will probably maintain this a viable industry.

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**Appendix A. Hoteliers’ Crisis Management During Covid-19***

**Covid-19 Impact & Business Status**

What statement best describes the impact of the Covid-19 crisis on your hotel? (1 – complete shutdown; 2 – major restrictions; 3 – recovery).

I am confident that my hotel will reopen and take guests in... (scroll-down)

- My hotel is already open and taking guests now
- My hotel is open and taking guests from May 2020
- My hotel is set to reopen from June 2020
- My hotel is set to open in July 2020
- My hotel is set to be open in August 2020
- My hotel is set to be open in September 2020
- My hotel is set to be open in October 2020
- My hotel is set to open in November 2020
- My hotel is set to be open in December 2020
- I will wait until 2021

**First Contributor to Property Recovery**

What segment do you think will be the first contributor to your recovery once restrictions are lifted? (Domestic Leisure Travel, Domestic Business Travel, International Leisure Travel, International Business Travel)

**Key Recovery Strategies**

Select your number 1 priority in overcoming the Covid-19 crisis and preparing for the upturn (scroll-down)

- Special cleaning program to accommodate health & safety concerns
- Redesign sales and marketing strategy to attack new markets or segments
- Offer long-term vouchers for bookings
- Shape offers and incentives around local market
- Create special offers and packages to generate new bookings
- Renegotiate distribution partnerships

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1. e.g., Limited flights, travel and border restrictions.
2. e.g., Financial recovery.
Financial Forecasts

What is your expectation of total hotel revenue in 2020 when compared to 2019?

- Decline of more than 50%
- Decline of 50%
- Decline of 20%
- Decline of 10%
- 0% (same in both years)
- Increase of 10%
- Increase of 20%
- Increase of 50%
- Increase of more than 50%

When do you estimate your business will recover to the same financial position as the year 2019? (scroll-down)

- Between January and June 2021
- Between January and June 2022
- Between July and December 2021
- Between July and December 2022
- In 2023 or later
- Never

*Note: Due to space constraints only the variables that were not fully described in the text are presented here. The full survey is available upon request.

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