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# COVID-19 Impacts and Recovery Strategies: The Case of the Hospitality Industry in Spain

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**Abstract:** The health crisis caused by the pandemic COVID-19 has been of such magnitude that the drop-off in economic and tourist activity in most countries is generating an economic crisis with consequences that are still difficult to measure. The present work analyses the origins and evolution of the coronavirus pandemic and reviews the literature related to the impacts and recovery strategies that were implemented in previous crisis situations affecting the hotel industry. In order to focus the study on one country, Spain was selected based on tourism indicators, the importance of tourism for this country and the importance of Spain as a leader in international tourist destinations. The influence of the pandemic on the Spanish tourism sector and, more specifically, on its hospitality industry is explored in depth. In addition, the main initiatives to support the tourism and hospitality sector that have been undertaken at the global, European and national levels are highlighted and, finally, the response and recovery strategies of the five largest Spanish hotel chains to guarantee a COVID-19-free stay in their facilities and to recover the accommodation activity are discussed.

**Keywords:** hotels; COVID-19; economic crisis; pandemics; response strategy; tourism; strategy management; health economics

## 1. Introduction

COVID-19—the acronym for coronavirus disease 2019—is an infectious disease caused by the SARS-CoV-2 virus. It was detected for the first time in Wuhan, Hubei province, China, at the end of 2019. Given its rapid expansion, the World Health Organization (WHO) declared a state of sanitary emergency on 30 January 2020; a month and a half later, specifically on 11 March, when the disease had surpassed the epidemic situation, it declared a state of pandemic. Since both the virus and the disease were unknown until then, there were no known drugs to stop the disease or vaccines to protect people against the virus, so the health authorities focused their greatest effort on recommending distance and social isolation (the evolution and characteristics of COVID-19 can be seen on the Johns Hopkins University website at <https://coronavirus.jhu.edu/map.html>, as well as on the Spanish version of the WHO website at <https://www.who.int/emergencies/diseases/novel-coronavirus-2019>).

Since its detection, the expansion of COVID-19 has been unstoppable and has reached practically all the countries of the world, affecting millions of people and causing hundreds of thousands of deaths. As of 29 September 2020, COVID-19 had affected more than 33 million people and caused more than a million deaths, and the numbering is still counting. The spread of the virus has not been homogeneous nor has its intensity been the same in all affected countries. As of that date, the five countries with the highest number of affected are the United States, with more than seven million and 21,281 per million inhabitants, followed, at a long distance, by India, Brazil, Russia and Colombia. The countries with the highest infection rates per million inhabitants are Qatar, Bahrain, Aruba, French Guiana and Israel, with rates exceeding 26,000 infected per million inhabitants. If we consider the

number of deaths caused by COVID-19, the United States again leads the ranking with more than 203,000 deaths, followed, by far, by Brazil, India, Mexico and the United Kingdom. The countries with the highest mortality rates per million inhabitants are San Marino, Peru, Belgium, Andorra and Bolivia, with rates exceeding 670 deaths per million inhabitants (<https://covid19.who.int/table>).

Although they have certainly saved thousands of lives, prophylactic measures based on distancing and social isolation, as well as strong limitations on all transport, have caused an economic crisis of incalculable effect in most of the countries of the world, whether they have been strongly affected by the virus itself or whether their economic activity is going to be strongly affected through its induced effects. Within the affected economic sectors, the tourism sector was the first affected by these limitations and will be the last to return to the “new normal”.

Spain is one of the few countries in the world in which a double situation occurs: tourism is a basic sector of the country’s economy and, at the same time, the country is a leading destination of world tourism. This double circumstance means that Spain is affected by the pandemic caused by COVID-19 in a very negative way and it is essential to have an adequate recovery strategy especially geared towards this sector and its companies. Until now, there has been little research that has analysed the impacts of previous crisis situations [1], and the existing studies on other epidemics have been focused mainly on Asia. In Europe, there is little experience in managing pandemic situations, and their consequences are unknown.

The research about COVID-19 impacts and recovery on hospitality is under construction with the most of contributions, conceptual [2,3] or critical reflections [4,5] and very scarce empirical research [6]. However, the current situation shows that the pandemic is not under control yet. Therefore, the situation is unpredictable, and research is essential to help recover tourism and its associated industries [7].

Therefore, this exploratory research, through a case study, aimed to measure and analyse the possible impacts that the pandemic will have on the Spanish hospitality industry. Likewise, it aimed to study the measures that are being taken by the main agents involved and the proposed strategies to speed up the return to normality and minimise the impacts of the economic crisis.

To achieve this objective, the following section will present a review of the literature related to the effect of some previous crises on the hospitality industry and the responses that were taken to get out of the situation. The choice of Spain as the centre of the study will then be justified due to the importance that Spain has for world tourism and the importance that tourism has for the Spanish economy. Next, the influence that COVID-19 is having on the world and the Spanish tourism sector will be explored, establishing medium-term forecasts based on the different scenarios with which the World Tourism Organization (UNWTO) is working. Then, the initiatives that are being implemented at the international and Spanish levels to support the emergence of the crisis generated by the pandemic will be analysed and, finally, the conclusions of the study will be presented, which will include the appropriate recommendations for the hospitality industry.

## 2. Literature Review: Crisis Situation and Hospitality Industry

When crises situations such as COVID-19 happen, they force hospitality companies to change their operating strategies. These events generate high levels of uncertainty and usually require quick responses in facing negative impacts [8]. Nevertheless, previous research has shown that there is little preparedness for a crisis situation in the hospitality industry [9], due mainly to a lack of devoted resources [10] and a lack of knowledge and experience about how to act [11,12].

Previous research has focused on destination response and recovery with little research specifically in hospitality responses and recovery strategies. However, the little research unanimity that exists has found that crisis situations have a strong impact on the hospitality industry. Table 1 presents a literature review focused on the hospitality industry classified by type of crisis impacts and response and recovery strategies. The immediate-term impacts are a severe decrease in tourists, occupancy levels and a fall in average daily rate (ADR) and revenue per available room (RevPar). In the short term, other impacts, such as job cuts, changes in operations and reduction in services, threaten the recovery

of the hospitality industry. In the medium–long term, difficulties in collecting loans, postponed future investment plans or difficulties in paying debts can accelerate the return to normal activity. Summarizing, the main response strategies are focused on cost reduction, push and relaunch local market, price reduction, preparation of contingency plans and human resource policies.

**Table 1.** Hospitality industry and crisis: impacts and recovery strategies.

| Type of Crisis & Geographic Area                        | Authors, Year                      | Description of Impact   | Response and Recovery Strategies   |
|---|------------------------------------|---|--|
| Terrorism<br>Terrorist attacks of 11 September 2001 USA | Stafford, Yu & Armoo 2002 [13]     | Dearth of businesses; Occupancy levels and room rates drop; Severe disruption of normal operations  | Ensuring a coordinated response of hospitality industry; Pushing to reopen airport and other major tourist attractions; Building a marketing plan  |
| Terrorism<br>Terrorist attacks of 11 September 2001 USA | Taylor & Enz 2002 [14]             | Occupancy levels, Average daily rates (ADR) and Revenue per room (RevPar) drop  | Push local market; marketing strategies; Human resources strategies; Focus in new segments; Cost rate-cutting strategies; Discounts on rates   |
| Terror of a war and terrorist attacks<br>Israel         | Israeli & Reichel 2003 [15]        | Decline in number of foreign tourists   | Relaunch domestic market; Focus on domestic market; Seek new domestic segments; Labour cutbacks; Reducing prices; marketing plan; Maintenance cost cut   |
| Pandemic<br>SARS 2003, Hong Kong                        | Chien & Law 2003 [16]              | International travel cancellations; Occupancy rate drop; Job cuts   | Closing of floors; Suspension of food and beverage services; Temporary closures; Pay cuts and no-pay leaves; Deploying of contingency plans; new operating measures; preventive health measures  |
| Pandemic<br>SARS 2003, Singapore                        | Henderson & Ng 2004 [17]           | Average hotel occupancy, Average room rates contracted, Revenues and earnings drop  | Cost savings; promotional packages for residents; improve services salaries reductions; new operating measures; preventive health measures   |
| Economic<br>Northern Cyprus                             | Okumus, Altinay & Arasli 2005 [18] | Tourist demand from Turkey decreased; Fixed and variable costs increased; Faced difficulties in collecting loans; Postponed future investment plans; Faced difficulties in paying debts   | Checked our business agreements and contracts; Increased our marketing and sales efforts; Reduced our costs; Postponed future investment plans; Reduced the number of staff  |
| Economic<br>Turkey                                      | Okumus & Karamustafa 2005 [11]     | Domestic demand decreased; Faced difficulties in collecting loans; Postponed future investment projects; Experienced a stressful working environment; Delays in services from the local authorities; Faced difficulties paying debts; Reduced budget for training | Cut costs; Improve quality; More cautious and conservative decisions on new investments; Increased marketing and sales efforts; Checked business agreements and contracts; Spent more time on environmental scanning and prepared plans  |
| Natural<br>Disaster<br>Indian Ocean tsunami; 2004       | Henderson 2007 [19]                | Hotel infrastructures were most severely damaged in Thailand, Sri Lanka and the Maldives; Mass exodus of tourists and cancellation of bookings; Decline in international tourists; Revenue per room down; Job loss  | Hotels arranged for the delivery of water and food supplies to those in need; Collected and distributed items such as clothing; Provided space and complementary accommodation for relief workers; Members of staff were released to assist with rescue and recovery operations as well as tasks such as translating and counselling; Human resource policies; Bargain rates |

Table 1. Cont.

| Type of Crisis & Geographic Area  | Authors, Year                              | Description of Impact   | Response and Recovery Strategies  |
|---|--|---|---|
| Pandemic SARS 2003, Toronto   | Tew, Lu, Tolomiczenko & Gellatly 2008 [20] | Loss in room nights; Occupancy rates were down; Losses in leisure and business travellers' cancelled plans; Losses in both visitors and revenue; Losses of jobs | Cutting costs; Laying off workers, Closing facilities and floors/wings of lodging areas (e.g., hotels); Employees to take vacation or unpaid leave; Redirected their marketing and sales; Discounted packages to boost their hotel occupancy; Laid off employees; Cut management salaries; Working actively with industry associations and governments; Offering large discounts to lure customers back and changing strategic plans; Using guest rooms for purposes other than accommodation (e.g., rent as commercial offices); "Tourist in your own city" strategy |
| Economic Global Economic Crisis, 2008 Spain   | Alonso-Almeida & Bremser 2013 [21]         | Reduction of income; Cancellations: Cost reduction; Efficiency improvement; Competitiveness improvement   | Measurements reactive; Added customer value; Flexibility; Proactive strategies: Customer loyalty and price reduction strategies   |
| Economic Global Economic Crisis 2008 Spain  | Bremser, Alonso-Almeida & Llach 2018 [9]   | N/A   | Prospectors were the best prepared to withstand an economic downturn with defenders scoring second. Reactors were the worst performers.   |
| Economic and Terrorist attacks Terrorist attack of 9/11 and Economic Crisis 2008 in Honduras and Costa Rica | Kubickova, Kirimhan & Li 2019 [22]         | Decline in hotel occupancy, rates and overall hotel performance; Lower prices; Decline in the average expenditure per guest; Hotel revenue                      | Terrorist attacks: international travel is substituted for domestic tourism; Revenue management tactics. Economic crisis: Domestic travel focus; Agreement between Honduras, Guatemala, El Salvador and Nicaragua to create a single Central American visa  |

Source: Own elaboration.

The natural disasters and pandemics resulted in longer periods of crises; as a consequence, they need more time to recovery than do economic crises (e.g., [22]). Some authors [23] summarised the critical factors for crisis recovery in such situations. These authors asserted that the factors are a crisis management and recovery plan; market segmentation; recovery promotion; recovery collaboration; and human resources management. As it is possible to see in Table 1, neither a crisis management plan nor recovery collaboration seem to be responses or strategies pursued by the hospitality industry before or after a major crisis situation. This could be very dangerous for hotel competitiveness and survival.

The scarce empirical research published regarding COVID-19 impacts until now reported severe falls in revenue per room and hotel occupancy [3]. In fact, the most worried issues for the hospitality sector concerning COVID-19 are financial issues and uncertainty related to pandemic duration and fear among tourists. Therefore, [24] recommend changes in revenue generation, plan post-lockdown and health protection measures in order to generate trust among tourists. In this sense, [6] advised the necessity of reinforcing the health and safety of their employees for none to be part of the problem due to a new coronavirus outbreak until there is a vacuum. Some of these future strategies are also considered in [25].

The following section will deepen an understanding of how the Spanish hospitality industry is facing the return to the "new normal" following a situation of zero tourism.

### 3. Case Analysis

#### 3.1. Importance of the Tourism Sector for Spain and of Spain for the International Tourism Sector: Contextual Analysis

Tourism has been making an important contribution to the GDP of the Spanish economy for many years. Specifically, it is estimated that, in 2018, the tourist gross domestic product stood at more than 147 billion euros, which represents 12.3% of the national GDP. Furthermore, this contribution has evolved very positively in recent years, with a growth rate in the 2015–2018 period of 25.3% in income and 11.8% in the percentage of national GDP [26].

This important contribution of tourism GDP to national wealth has been due to the attractiveness, welcoming capacity and high degree of tourism competitiveness that characterises Spain. In the period 2016–2019, inbound tourism grew 11.13%. The main origin countries for these tourists were the United Kingdom (21.60%), Germany (13.35%) and France (13.33%), which accounted for 48.28% of international tourist arrivals in Spain. This is a major added problem of the pandemic, because these three countries are especially suffering the COVID-19 crisis due to having very high levels of transmission among their population [27].

The attractiveness of Spain as a tourist destination has enabled it to occupy, in recent years, the second position worldwide for international tourist arrivals, reaching entries of 83.7 million tourists in 2019. It is important to highlight that the ten most important tourist destinations in the world (France, Spain, United States, China, Italy, Turkey, Mexico, Germany, Thailand and the United Kingdom) have, in general, had to bear the greatest impact of COVID-19. If international tourism receipts are used as an indicator of tourist attraction, Spain is again in second place in the world, this time behind the United States and ahead of France, Thailand, the United Kingdom, Italy, Australia, Germany, Japan and Macao (China), with an income close to US\$80 billion [28]. Finally, if level of competitiveness is used as an indicator to demonstrate the importance of Spain as a tourist destination, since 2015, Spain has been in the first position in the world in the competitiveness ranking of tourist destinations prepared biennially by the World Economic Forum. Spain has been the most competitive country in the world as a tourist destination over this long period of time, followed by France and Germany [29–31].

Within the tourism sector, the hospitality industry has a special role in Spain, because international tourists who visit Spain prefer hotel accommodations. Specifically, in 2019, 65.38% of these tourists stayed in a hotel. In addition, the evolution in recent years has been very positive, despite the strong growth in the use of rental housing and shared housing with their owners, reaching a growth rate of 13.61% in the 2016–2019 period, with an average stay in 2019 of 3.08 days [32].

On the other hand, most of the tourists who stay in Spain in hotels are foreigners. In 2019, overnight stays by residents abroad accounted for 65.20% of total overnight stays, compared to 34.80% corresponding to Spanish residents. This accommodation capacity is due to the fact that Spain has an important hotel offering. Specifically, the average number of hotels opened in Spain in 2019 amounted to 14,840 hotels that offered a total of 18,201,847 beds annually and hired, throughout the year, a global average of 219,796 employees [32].

Now that the importance of the tourism sector for the Spanish economy and the importance that Spain has in the field of international tourism have been demonstrated, along with the weight that hotels have in tourist accommodations, we will now analyse the influence that the pandemic is having both in the world tourism sector and in the Spanish sector, as well as its foreseeable evolution in the medium term.

#### 3.2. The Influence of COVID-19 in the World and Spanish Tourism Sectors

The UNWTO World Tourism Barometer of May 2020, prepared with a special focus on the impact of COVID-19, indicated that in March 2020, international tourist arrivals in the world fell by 57%. This means that in the first quarter of 2020, there was a reduction of 67 million international tourist arrivals and a reduction of US\$80 million in income. For the rest of the year, the experts consulted



by UNWTO have established three possible scenarios that contemplate a reduction in international tourist arrivals in 2020, ranging from 58% to 78%, depending on whether travel restrictions start to be lifted and national borders opened in early July (−58%), early September (−70%) or in early December (−78%), which could put 100 to 120 million of direct tourism jobs at risk. This data can mean, over the entire year of 2020, a loss of 850 million to 1.1 billion international tourist arrivals and between a US\$910 billion to US\$1.2 trillion loss in export revenues from tourism, putting at risk between 100 to 120 million direct tourism jobs. These calculations are based on available tourism data for January–March and other information, such as the shutdown of all national borders as of late April, although this is still in a context of high uncertainty [28].

According to UNWTO's Report on COVID-19-Related Travel Restrictions, as of 10 September, 115 (53%) of all worldwide destinations have eased COVID-19-related travel restrictions for international tourism and 93 destinations (43%) are keeping their borders completely closed for international tourism [33].

Following the SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis prepared in UNWTO's Report, the main threats generated by the pandemic can be specified in the economic environment: world recession; rising unemployment and jobs at risk; closure of businesses, mainly small and medium enterprises (SMEs); disposable income reduction; uncertainty weighing on consumer and business confidence; the uncertain length of the pandemic (including resurgence) and vaccine unavailability; the extent of lockdowns and travel restrictions; and, in the unknown form of the future, the "new normal". However, it can also provoke a series of opportunities that must be considered, such as the need to rethink the business model; the impulse of innovation and digitalisation; the sustainability and sustainable-oriented segments (rural, nature, health); or the progress in adaptation plans in destinations and companies. In this sense, COVID-19 can support the fulfilment of some of the United Nations Sustainable Development Goals (SDGs) included in the 2030 Agenda, such as 9, 12, 14 and 17 [34].

In any case, Spain is going to be one of the tourist destinations most affected by the pandemic due to the magnitude and influence that the tourism sector has on its economy and the incidence of COVID-19 in the country. If we apply the possibility of any of the three scenarios foreseen by UNWTO, the tourism situation in Spain by the end of the year would be disastrous under any of them. With the information available at the time of this paper, in the first seven months of 2020, there had already been a decrease of 72.43% in international tourist arrivals, or more than 34.8 million tourists. January had a fall of 1.36%, followed by a recovery of 0.98% in February, but March was a disastrous month with a decrease in the entry of foreign tourists of 64.27%, shifting from an entrance of more than 5.5 million tourists to just over two million. However, April and May were even worse, because there was no entry of international tourists [27]. If the most favourable of the three planned scenarios were to occur, which represents a reduction of 58% in international tourist arrivals, Spain would receive in the entirety of 2020 a little more than 35 million tourists; if the second scenario were to occur, which is based on a 70% reduction, it would place the entry of international tourists at just over 25 million; and if the worst-case scenario were to occur, which would be based on travel restrictions starting to lift and national borders opening in early December, this figure would be reduced to almost 18.5 million international tourists (see Table 2).

These abrupt reductions in the entry of foreign tourists would have a dramatic impact on tourist income. In the first seven months of 2020, there had already been a reduction of 72.82% of income, or more than €38 billion (although there had been a cumulative rise of 1.66% in the first two months of the year, there was an enormous decrease in the number of international tourists who came to Spain since March). For the rest of the year, if the best of the three planned scenarios were to occur, Spain would receive in all of 2020 some 38 thousand seven hundred million €; if the second scenario were to occur, revenues would be just over €27 billion; and if the worst-case scenario were to occur, this figure would be reduced to just over €20 billion (see Table 3).

**Table 2.** Foreign tourist arrivals in 2019 and forecast for 2020.

|            | Tourist Arrivals |            | Variation 2019–2020 (%) | Accumulated Variation 2019–2020 (%) |
|------------|------------------|------------|-------------------------|-------------------------------------|
|            | 2019             | 2020       |                         |                                     |
| January    | 4,195,641        | 4,138,371  | −1.36                   | −1.36                               |
| February   | 380,504          | 4,423,576  | 0.98                    | −0.17                               |
| March      | 5,649,577        | 2,018,323  | −64.27                  | −25.63                              |
| April      | 7,169,675        | 0          | −100                    | −50.55                              |
| May        | 7,952,788        | 0          | −100                    | −63.95                              |
| June       | 8,828,499        | 204,926    | −97.68                  | −71.75                              |
| July       | 9,887,047        | 2,464,441  | −75.07                  | −72.43                              |
| August     | 10,121,985       |            |                         |                                     |
| September  | 8,914,761        |            |                         |                                     |
| October    | 7,624,486        |            |                         |                                     |
| November   | 4,664,345        |            |                         |                                     |
| December   | 4,314,612        |            |                         |                                     |
| TOTAL      | 83,703,920       |            |                         |                                     |
| Scenario A |                  | 35,155,646 | −58%                    |                                     |
| Scenario B |                  | 25,111,176 | −70%                    |                                     |
| Scenario C |                  | 18,414,862 | −78%                    |                                     |

Source: Estadística de Movimientos turísticos en fronteras (Frontur) and own elaboration. Estimate for 2020 based on UNWTO World Tourism Barometer in May 2020 scenario forecasts.

**Table 3.** Spain International tourism receipts in 2019 and forecast for 2020.

|            | Foreign Tourist Income |            | Variation 2019–2020 (%) | Accumulated Variation (%) |
|------------|------------------------|------------|-------------------------|---------------------------|
|            | 2019                   | 2020       |                         |                           |
| January    | €4678.67               | €4778.57   | 2.14                    | 2.14                      |
| February   | €4658.61               | €4713.58   | 1.18                    | 1.66                      |
| March      | €6034.87               | €2214.89   | −63.30                  | −24.84                    |
| April      | €7095.08               | €0         | −100.00                 | −47.89                    |
| May        | €8194.64               | €0         | −100.00                 | −61.82                    |
| June       | €9696.43               | €133.37    | −98.62                  | −70.66                    |
| July       | €11,979.69             | €2450.09   | −79.55                  | −72.82                    |
| August     | €11,764.51             |            |                         |                           |
| September  | €9705.72               |            |                         |                           |
| October    | €8367.07               |            |                         |                           |
| November   | €5067.76               |            |                         |                           |
| December   | €5013.38               |            |                         |                           |
| TOTAL      | €92,256.43             |            |                         |                           |
| Scenario A |                        | €38,747.70 | −58.00                  |                           |
| Scenario B |                        | €27,676.93 | −70.00                  |                           |
| Scenario C |                        | €20,296.41 | −78.00                  |                           |

Data in € millions. Source: Egatur and own elaboration. Estimate for 2020 based on UNWTO World Tourism Barometer in May 2020 scenario forecasts.

The great reduction in international tourism arrivals will cause a sharp contraction in hotel demand in Spain in 2020. Already in March 2020—Spain started the confinement on 11 March—total hotel overnight stays in Spain had gone from more than 21 million in March 2019 to just over 8 million in the same month of 2020, a figure that was aggravated by the prohibition of entry of foreign tourists and by the closure of the entire hospitality industry during the month of April, which gave rise to zero overnight stays in that month compared to almost twenty-seven million in the same month in the previous year. In the first seven months of the year, the total hotel overnight stays in Spain had gone from more than 184.7 million in 2019 to just over 46.4 million in the same period of 2020 [27] (Data as of 3 September 2020). In addition, the pandemic caused a strong contraction in March 2020 in the number of hotels open—reduction of 22.02% compared to the same month in the previous year—the number of beds offered—reduction of 8.53% with respect to the same month of the previous year—and the number of employees hired—reduction of 30.94% with respect to the same month of the previous year—due as well to the isolation and reduction of mobility measures that were taken in Spain in the middle of that month. The situation worsened in May, as all the hotels were closed except for those that were offered as medicalised hotels. These data have improved during the summer months, but they are still far from the pre-pandemic situation [32] (Data as of 3 September 2020) (see Table 4).

Given these disastrous data, it is necessary for Spain to adopt recovery strategies that apply in general to the tourism sector and in particular to the hospitality sector that mitigate, as much as possible, the negative effects that the pandemic is causing to these sectors. In the next section, an analysis will be made of the initiatives that are being undertaken both internationally and in Spain to try to properly recover the tourism sector.

**Table 4.** Hotels, beds and employees of the hospitality industry in Spain.

|           | Number of Hotels Open |        | Variation 2019–2020 | Number of Beds Offered |           | Variation 2019–2020 | Number of Employees |         | Variation 2019–2020 |
|-----------|-----------------------|--------|---------------------|------------------------|-----------|---------------------|---------------------|---------|---------------------|
|           | 2019                  | 2020   |                     | 2019                   | 2020      |                     | 2019                | 2020    |                     |
| January   | 11,995                | 11,987 | −0.07               | 1,101,179              | 1,106,289 | 0.46                | 153,568             | 155,521 | 1.27                |
| February  | 12,749                | 12,662 | −0.68               | 1,180,863              | 1,185,245 | 0.37                | 161,563             | 164,710 | 1.95                |
| March     | 13,808                | 10,768 | −22.02              | 1,301,579              | 930,203   | −28.53              | 179,138             | 123,711 | −30.94              |
| April     | 15,139                | 0      | −100.00             | 1,497,219              | 0         | −100.00             | 212,089             | 0       | −100.00             |
| May       | 16,144                | 1567   | −90.29              | 1,763,479              | 81,827    | −95.36              | 249,885             | 5526    | −97.79              |
| June      | 16,585                | 5896   | −64.45              | 1,823,073              | 322,508   | −82.31              | 268,016             | 28,341  | −89.43              |
| July      | 17,003                | 12,068 | −29.02              | 1,860,292              | 1025713   | −44.86              | 282,483             | 114,990 | −59.29              |
| August    | 16,900                |        | −100.00             | 1,855,939              |           | −100.00             | 285,578             |         |                     |
| September | 16,541                |        | −100.00             | 1,831,780              |           | −100.00             | 274,467             |         |                     |
| October   | 15,360                |        | −100.00             | 1,653,045              |           | −100.00             | 238,608             |         |                     |
| November  | 13,294                |        | −100.00             | 1,196,165              |           | −100.00             | 169,731             |         |                     |
| December  | 12,559                |        | −100.00             | 1,137,234              |           | −100.00             | 162,420             |         |                     |
|           | 14,840                |        |                     | 18,201,847             |           |                     | 219,796             |         |                     |

Source: Encuesta de Ocupación Hotelera. INE. Data to 3 September 2020.

#### 4. Initiatives to Support the Spanish Tourism and Hospitality Industry

In the face of the economic crisis caused by the COVID-19 health pandemic, a wide range of initiatives have been undertaken, both internationally and nationally, which have been complemented by specific actions by hotels and hotel chains operating in Spain.



#### 4.1. International Initiatives to Support the Tourism Sector and Hospitality Industry

At the international level, two general types of initiatives have been launched to support the crisis generated by COVID-19. The first set of measures are of an economic-financial nature and were initially promoted after a telematic meeting of G20 ministers held on 24 April 2020, in which the need to work together and in a coordinated way worldwide was raised, setting homogeneous measures to create safe destinations that allow an adequate recovery in the tourism sector. In this way, the G20 tries to take on the challenge that the World Travel & Tourism Council (WTTC) launched two days earlier; that is, to lead a coordinated recovery of the tourism sector worldwide, since the countries that make up the G20 have a tourism activity that represents more than three quarters of world tourism GDP [35].

The European Council approved, on 23 April 2020, an initial budget of 540,000 million euros to help countries finance their plans to avoid mass layoffs due to the COVID-19 pandemic. With the aim to repair damage from the crisis and prepare a better future for the next generation, the Commission sent to the European Parliament, the European Council, the Council, the European Economic and Social Committee and the Committee of the Regions (Brussels, 27 May 2020 COM (2020) 456 final) a Communication on 27 May 2020 entitled Europe's moment: Repair and Prepare for the Next Generation. It proposed a new €750 billion recovery instrument, Next Generation EU, embedded within a powerful and modern long-term EU budget. In addition to Next Generation EU, the Commission proposed to revamp the EU budget, amounting to some €1100 billion between 2021 and 2027 (<https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52020DC0456&from=EN>). From the Next Generation EU, it is estimated that Spain could receive around 140,000 million, of which 77,000 million would be non-repayable and the remaining 63,000 million in loans.

The second set of measures are sanitary protection. The tourism sector, through the WTTC, developed a series of protocols [36] to reactivate safe tourism in the world, and, at the end of May 2020, the protocols to be applied in hotels had already been published. The "suggested protocols for hospitality were compiled based on input from leading hospitality companies either directly or from their public announcements around the safe, healthy and responsible reopening of hotels to the public. The protocols also take into account World Health Organization (WHO) and the US Centers for Disease Control and Prevention (CDC) guidelines. The objective is to ensure that protocols are in place across all relevant functions with an increased focus on health, safety and social distancing guidance which travelers will need and expect" [36].

#### 4.2. National Initiatives to Support the Tourism Sector and the Hospitality Industry

At the Spanish state level, economic-financial initiatives can be classified into two categories. The first includes all those policies and measures to support companies in the sector whose survival may be at risk due to the harmful effects of the pandemic. This support to the tourism sector can be classified into four categories: (a) labour measures, through the possibility of applying temporary employment regulation files to companies in the tourism sector (until 2 June, a total of 3,386,000 workers used these files; <http://www.sepe.es/HomeSepe/COVID-19/noticias.html>); (b) financial aid, through the application for bank loans with public guarantees (by mid-May 2020, more than 80,000 applications had been processed from 68,000 companies for a total of almost 6,500 million euros); (c) support for self-employed workers in the tourism sector through financial benefits (in mid-May 2020, more than 250,000 workers in the tourism sector received these benefits); and (d) tax measures, which are specified in the deferral of debts, business and self-employed taxes for a period of six months. Most of these measures have also been implemented, with their specific features, by the rest of the European countries. A comparative summary of the main measures to support the hotel sector implemented in Germany, Austria, Spain, France, Finland and the United Kingdom can be seen in [37].

Regarding sanitary protection measures, a series of initiatives have been approved to convey to domestic and foreign tourist the feeling of sanitary security, which has always been a virtue of Spain as a tourist destination and which has been seriously affected by the significant number of people contaminated and killed by COVID-19 during this period.

The Institute for Spanish Tourist Quality (ICTE), by delegation from the Secretary of State for Tourism, assumed the coordination of a National Project of Technical Specifications and Guarantee Seals for the Prevention of COVID-19 that would allow companies, Spanish tourist organisations and territories encompassed in 21 subsectors or tourist activities to assure tourists of sanitary conditions that would make their stay in Spain safe. Specifically, the guide entitled “Measures to reduce the spread of the SARS-CoV-2 coronavirus. Hotels and tourist apartments. Guidelines and recommendations” contains a series of guidelines and recommendations that must be applied by hotels, tourist apartments, hostels and pensions to minimise the risks of contagion by the SARS-CoV-2 virus (<https://www.mincotur.gob.es/es-es/COVID-19/GuiasSectorTurismo/Hoteles.pdf>).

In summary, Table 5 shows the different types of institutional initiatives that are being implemented in the tourism and hospitality sector to support the way out of the crisis caused by COVID-19. These initiatives are focused on supporting tourism companies, encouraging tourism and reducing infections.

**Table 5.** Types of initiatives, driving entities and scope of action against COVID-19 in the tourism sector.

| Types of Initiatives                                  | Driving Entities     | Scope of Action           |
|---|----------------------|---------------------------|
| Policies to support companies in the tourism sector   | European Commission  | Labour                    |
| Tourism incentive policies                            | Government of Spain  | Financial                 |
| Policies for reducing contagion in the tourism sector | Regional Governments | Tax                       |
|   | Town halls           | Support payments of rents |
|   | Tourism associations | General sector support    |

Source: Own elaboration.

#### 4.3. Initiatives Undertaken by Large Spanish Hotel Chains

In addition to the measures being taken by the main agents related to the tourism sector, in general, and with the hospitality industry, in particular, the companies of the sector themselves are undertaking a series of policies and initiatives aimed at trying to recover their economic activity as soon as possible while complying with the sanitary protection measures that are being demanded or recommended by public tourist and health institutions.

To analyse the private initiatives that companies in the sector are developing in Spain, the five largest Spanish hotel chains based on turnover have been selected. As shown in Table 6, these chains are Meliá Hotels International (hereinafter Meliá), Iberostar Hotels & Resorts (Iberostar), Barceló Hotel Group (Barceló), Riu Hotels & Resorts (Riu) and the NH Hotel Group (NH). All of them invoice more than 1500 million euros, have between almost 100 and more than 350 hotels and offer between 32,000 and 83,000 rooms to their guests.

**Table 6.** Receipts and number of hotels and rooms of the first five Spanish hotel chains.

|                            | Receipts * | Hotels | Rooms  |
|----------------------------|------------|--------|--------|
|                            | 2018       | 2019   | 2019   |
| Meliá Hotels International | 2946.5     | 329    | 83,018 |
| Iberostar Hotels & Resorts | 2659       | 102    | 32,404 |
| Barceló Hotel Group        | 2559       | 251    | 55,944 |
| Riu Hotels & Resorts       | 2114       | 95     | 45,648 |
| NH Hotel Group             | 1623       | 369    | 57,356 |

\* Data in € millions; Source: [38] and own elaboration.

Four of them were among the 50 largest in the world by number of rooms in 2018. Specifically, Meliá was in 20th position, Barceló in 31st, Riu in 38th and Iberostar in 46th. NH does not appear in that ranking because, after its acquisition by Minor International, all its hotels became part of the Thai group that was ranked 23rd worldwide in that year (hotelsmag.com/July-August 2019. Special Report 325 hotels).

As shown in Table 7, the five large Spanish hotel chains have taken advantage of the period of total closure of the economy (period March to June) to carry out studies aimed at making their facilities free of COVID-19 so that, during their stays, their clients are not contagious. One of the main factors for the recovery of tourism is the confidence of the tourist in the destination and in the hotel company [21].

The five have deployed collaboration strategies with certifying entities specialised in the field of security, in general, and health security, in particular. In the specific case of Meliá, it has had the support of Bureau Veritas, an entity that certifies the restart of activity in establishments, complying with the new security measures due to COVID-19 in relation to the protection of people, to processes and facilities. Iberostar and NH relied on SGS (Société Générale de Surveillance), an entity that provides inspection, verification, testing and certification services related to COVID-19. Riu had the participation of the Preverisk Group, an international consultancy firm specialised in consulting, auditing and training in health and safety in the tourism sector. Finally, Barceló used the protocols and recommendations issued by Cristal International Standards, providers of security and risk management solutions from Biolinea, a company specialised in the field of public health and tourism, as benchmarks against COVID-19, Bio 9000, a food consulting company, and Biolab, a company that performs biological tests, mainly in the area of toxicology and microbiology.

Regarding the contents of said contagion prevention programmes, the approach that these chains have followed has been similar in substance but heterogeneous in the form of presentation. Thus, some chains have preferred to establish general lines of action that were aimed at meeting the objectives set in this area, such as the case of Meliá, Iberostar, Barceló and NH. Instead, Riu has preferred to directly target the different departments or areas of hotel activity and has presented RIU Protect, a new service for its clients that provides medical assistance to its guests, including infection by COVID-19, during their holidays (<https://www.smarttravel.news/2020/06/18/protocolos-sanitarios-sostenibilidad-e-igualdad-genero-nuevas-prioridades/>).

In any case, the five Spanish hotel groups have set themselves the common objective of protecting the health of customers and their employees, implementing strict hygiene standards in the facilities and in the processes, promoting social distancing and avoiding, as much as possible, direct contact between employees and customers by strengthening digitisation and opting to undertake extensive communication and awareness programmes that involve both customers and employees in the adoption of and compliance with these prevention measures against COVID-19.

Some of these initiatives are similar to those undertaken in previous health crises in Asia [16,20]. Specifically, if we compare these initiatives with those implemented after the Pandemic SARS 2003 in Hong Kong, Singapore and Toronto (see Table 1), it can be seen that they have as a common link the adoption of preventive health measures aimed at avoiding contagions caused by this virus, as well as reactivating the demand by increasing confidence.

However, there are also substantial changes that affect the core of the hotel business, such as those related to the acceleration of digitisation, the operation of accommodation and food and beverage services and the use of common areas, as well as internal security protocols and the creation of new departments and jobs.

**Table 7.** Initiatives taken by the main Spanish hotel chains against COVID-19.

|                            | Programme Name       | Main Axes and Areas of Action against COVID-19  |
|----------------------------|----------------------|---|
| Meliá Hotels International | Stay Safe with Meliá | <ul style="list-style-type: none"> <li>- Security for employees and clients</li> <li>- Reduction of customer–employee contact</li> <li>- Optimisation of operational processes (simplification and digitisation)</li> <li>- Adaptation of brands to new customer needs</li> </ul>   |
| Iberostar Hotels & Resorts | How we care          | <ul style="list-style-type: none"> <li>- Offer a safe environment</li> <li>- Apply hygiene standards</li> <li>- Secure social space</li> <li>- Offer innovative experiences</li> </ul>  |
| Barceló Hotel Group        | We Care about You    | <ul style="list-style-type: none"> <li>- Sanitation and disinfection</li> <li>- Ensure health security</li> <li>- Strengthen the digital experience</li> <li>- Comply with protocols in food and beverages</li> <li>- Employee training and awareness</li> <li>- Specific plans for meetings and events and other services</li> <li>- Communication plan</li> </ul>   |
| Riu Hotels & Resorts       | Sanitary Protocol    | <ul style="list-style-type: none"> <li>- Staff reception and access</li> <li>- Suppliers</li> <li>- Maintenance</li> <li>- Restaurant, bar and kitchen</li> <li>- Housekeeping</li> <li>- Laundry</li> <li>- Animation</li> <li>- Spa, fitness and swimming pools</li> <li>- Stores</li> </ul>  |
| NH Hotel Group             | Feel Safe at NH      | <ul style="list-style-type: none"> <li>- Supervision of disinfection and cleaning</li> <li>- Advanced scanning</li> <li>- Cleaning and disinfection protocols</li> <li>- Adapted catering services</li> <li>- Rules of social distancing</li> <li>- Protocols and personal protection material</li> <li>- Air and water purification protocols</li> <li>- City Connection advisory service</li> <li>- Safety and health protocols for employees</li> <li>- Creation of a person in charge of health security</li> </ul> |

Source: [39–43] and own elaboration.

One of the response strategies that has been implemented in all health crises as a recovery strategy has been the offer of rooms for purposes other than tourism accommodation. This response strategy was implemented by the sector during COVID-19 after Spain closed all its economic sectors and the health sector was on the verge of collapse. The Madrid Hotel Business Association offered the Government of Madrid the possibility of medicalising some hotels during the harshest phase of the pandemic. Specifically, beds were offered in 13 hotels (Ayre Gran Hotel Colón, Hotel Marriott Auditorium, Hotel Vía Castellana, Hotel City House Florida Norte, Hotel Vértice Roomspace, Hotel Miguel Ángel, Hotel NH Parla, Hotel Ilunium Atrium, Hotel Praga Santos, Hotel Euroforum Palacio, Hotel Las Provincias, Catalonia Plaza Mayor and Barceló Occidental Aranjuez) and more than 2500 patients infected with COVID-19 stayed and were treated there. Other hotels served as temporary accommodations for workers from essential economic sectors and the state security forces who had to travel throughout the territory to work where the government required them to be ([https://www.hosteltur.com/136208\\_comienza-en-madrid-el-repliegue-de-hoteles-sanitarizados-por-el-covid-19.html](https://www.hosteltur.com/136208_comienza-en-madrid-el-repliegue-de-hoteles-sanitarizados-por-el-covid-19.html)).



Other recovery measures that are common in all health crises have been implemented, such as the redirection of hotel marketing and sales programmes and promotional packages. As can be seen in Table 7, four of the five chains have given names to the infection prevention programmes that they are implementing. Specifically, Meliá has named it “Stay Safe with Meliá”; Iberostar, “How we care”; Barceló, “We Care about You” and NH, “Feel Safe at NH”. All these programmes are available on the website of each chain. See Figures 1–5 for the websites of the channels in which these programmes are cited.



Figure 1. Meliá. Source: <https://www.melia.com/es/home.htm>.

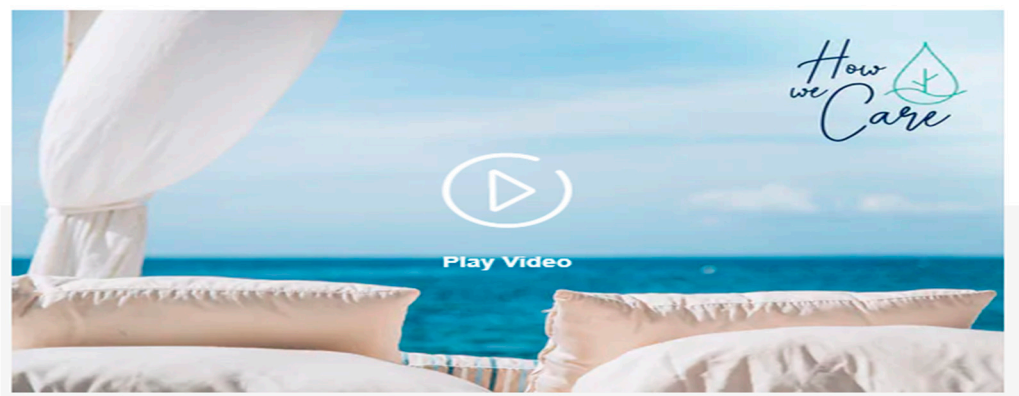


Figure 2. Iberostar. Source: [https://www.iberostar.com/en/?new\\_fastbooking=true&old\\_fastbooking=true](https://www.iberostar.com/en/?new_fastbooking=true&old_fastbooking=true).

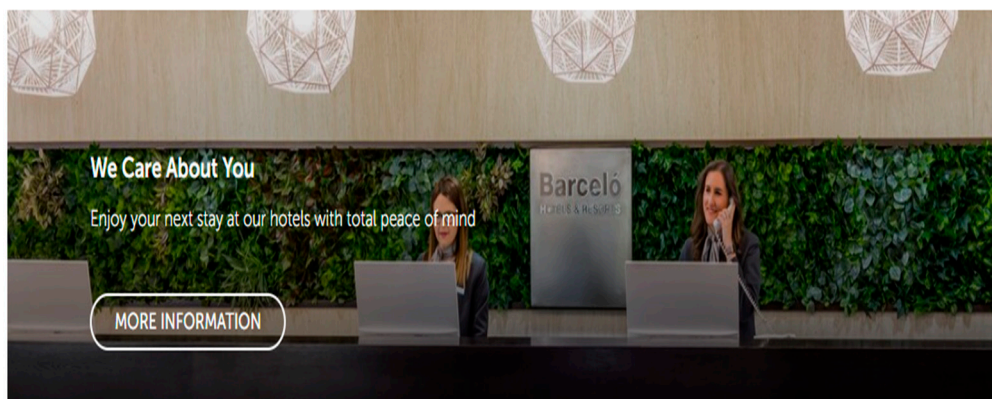


Figure 3. Barceló. Source: <https://www.barcelo.com/en-es/>.



Figure 4. Riu. Source: <https://www.riu.com/en/home.jsp>.



Figure 5. NH. Source: <https://www.nh-hoteles.es/>.

These campaigns are aimed at attracting and rebuilding confidence in tourists, one of today's main priorities. The hotel sector has taken sanitary measures, and these campaigns aim to create value from them by showing the creation of social distance in the jobs and leisure places, as well as changes in the accommodations. However, these measures and campaigns will only be successful if there is close collaboration between the government and the hotel sector. The government's support is needed in relation to the permitted mobility measures, opening of borders and airports, elimination of quarantine periods and other measures that pose barriers to the enjoyment of tourist activities. In addition, the hotel sector must ensure the health of tourists staying at its facilities.

Therefore, as previous research has shown (see Table 1), pandemics have a severe impact on the hospitality industry during the medium–long term [22]. Nevertheless, the current pandemic seems to be more dangerous and challenging than previous ones because of its global expansion and nobody knows when it will be controlled and have a vacuum at this moment.

## 5. Conclusions

In conclusion, it can be said that the epidemic caused by COVID-19 is the largest pandemic that has affected the world in the last hundred years and has caused devastating effects both on the world economy and on that of the individual nations and, especially, the tourist field. These negative effects have been due to: (a) the drastic restrictions on mobility that were initially decreed by the governments of most countries which have paralysed a large part of productive and service activity, as well as transportation and movements between territories, and which have cancelled the movement of tourists around the world; and (b) the reduction in disposable income of many families who have seen their incomes disappear or decrease for a considerable period of time, which will affect tourist spending capacity even after the measures of confinement and restriction of mobility have been made more flexible, at least in the short and medium term.



Faced with this situation, the response of supranational institutions, especially the European Union, has been overwhelming. The European Union has involved itself as never before in the revival of economic activity in its sphere of action, granting significant financial resources to countries more affected by the pandemic, some in non-repayment and others in the form of repayable credits. In the same way, all nations have made an important commitment to emerge from the crisis with labour, financial and fiscal measures.

In the field of tourism, the repercussions for Spain, as a leading country in the world in terms of tourism competitiveness, receipts and inbound tourist, are going to be enormous. The fall in tourism GDP, tourism employment and tourism income will be of a magnitude never seen before. If, as everything seems to indicate, the first scenario contemplated by UNWTO occurs, in which travel restrictions will start to be lifted and national borders opened in early July 2020, the reduction in entries by international tourists would be around 58%. This would mean that, in the entirety of the year 2020, the volume of entry of international tourists would be around 35 million people and the generated income would be about 38,747.70 million euros, figures far removed from those of the previous year. In order to restore confidence in tourists, the tourism sector in general, and the hospitality industry in particular, have mobilised with the aim of protecting tourists from the virus by promoting—in the case of public and private tourism institutions—and implementing—in the case of hotel establishments—action protocols to make the stay of tourists in their facilities safer.

In the specific case of Spain, the Secretary of State for Tourism, through ICTE, has published action protocols in the tourism sector in the face of the pandemic which are being followed by companies in the sector. Furthermore, the hospitality industry is adopting its own protection measures, as evidenced by the case study conducted, which show that the five largest Spanish hotel chains by turnover have their own action programmes against COVID-19. Given the sharp drop in the entry of international tourists into Spain, one of the possible short- to medium-term solutions is to try to take advantage of domestic tourism while restrictions on international mobility continue to be maintained. Given this situation, the Spanish authorities will focus, like many other countries that receive international tourism, on trying to support domestic tourism, as has happened in other past crises situations. Thus, in the meantime, public–private collaboration is crucial, as well as governmental measures to support the tourism industry.

The hospitality industry should be focused on building trust in tourists, reinforcing their brand and adapting their operations to the so-called “new normal”. Those strategies could be valuable in this period and in the near future when the pandemic is controlled.

The main limitation of the present study is that, during its execution, the pandemic was still in the process of expanding, with uneven rates depending on each affected country. This does not allow an analysis of this situation from the proper perspective, since it is still unknown if the virus can be eradicated, if there will again be outbreaks in the countries that have it more controlled or if the coronavirus will mutate. With regard to subsequent studies, it would be convenient to analyse what the real evolution of the tourism and hospitality industry has been, at least during the year 2020, and what the forecasts are for the following years, establishing scenarios that facilitate a prospective study. Another future line of research will be to analyse the result of these strategies in tourists, the perception of Spain as a tourist destination, and the recovery of the hospitality industry. Future research should measure the impact of governmental initiatives to support the tourism and changes in hospitality in organization, operations and performance to survive in the “new normal”.

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