



Uncertainty and expectations in Portugal's tourism activities. Impacts of COVID-19

Norberto Santos^{*}, Claudete Oliveira Moreira

Univ Coimbra, CEGOT, Faculty of Arts and Humanities, Portugal

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ABSTRACT

Portugal has established itself as one of the most competitive tourist destinations in the world. The tourist destination, which comprises the mainland territory and two archipelagos, enjoyed unprecedented, sustained growth in tourist activity in 2019. The COVID-19 pandemic has had serious repercussions on the national tourism system, although government measures have been implemented to mitigate the impacts. The results for tourist accommodation show that after the first phase of the pandemic there was a slight recovery of some tourism activity indicators, mainly in more consolidated destinations: Algarve and Madeira. The low-density territories with *peri-urban* and rural features, very much leaning towards nature tourism (Alentejo and Central Portugal) suffered a less severe impact on tourism demand, and domestic tourism was able to mitigate some negative effects. The data is organized using year-on-year variation, considering the years 2019 and 2020. The conclusions seek to make proposals for the recovery of post-COVID-19 tourism and define some of the ways forward.

1. Introduction

The tourism system is a complex social and economic system with highly interdependent components; it is presented as an open system (Beni, 2001; Hall & Lew, 2009; de Jimenez Martinez, 2005; Leiper, 1979; Leiper, 2000; Leiper, 2004; McKercher, 1999; Mill & Morrison, 2009; Moreira, 2013). Any change in the system's setting (political, economic, social, technological, natural, environmental) has an impact on its components and its functioning. The tourism system and its components are extremely sensitive and vulnerable to any cyclical change. Economic crises, armed conflicts, terrorism, epidemic outbreaks have an impact on the local, regional, national and global tourism system. The typical economic activities that make up the tourism system and the agents that stimulate them, Destination Management Organizations, tourists and tourist destinations, are creating a range of adaptive mechanisms following the disruptive events that are affecting the tourism system.

Nowadays, many countries depend heavily on tourism and will experience dramatic effects on employment, especially on the non-renewal of temporary contacts in businesses forced to close, and national income (Marques Santos, Madrid González, Haegeman, & Rainoldi, 2020; Madani, Boutebal, Benhamida, & Bryant, 2020; WTTC, 2020; Sharma, Thomas, & Paul, 2021; UNCTD, 2020). This is due to SARS-

CoV-2 (*Severe Acute Respiratory Syndrome Coronavirus 2*), responsible for COVID-19 (*Coronavirus disease of 2019*), which was first identified in the city of Wuhan, Hubei province, China, in December 2019, from where it rapidly spread geographically on a global scale, multiplying and reducing the transmission hotspots. The current unprecedented globalization of social economics, with a worldwide mobility of people, goods and services in an increasingly spatially connected market and society, has fostered rapid geographical spread, which led the World Health Organization to declare the pandemic situation on 11 March 2020.

The World Economic Forum's global risk report (WEF, 2020) identifies economic, environmental, geopolitical, societal and technological risks. In this report risk "is defined as an uncertain event or condition that, if it occurs, can cause significant negative impact for several countries or industries within the next 10 years" (ibid., p. 86). One of the societal risks identified is "rapid and massive spread of infectious diseases". Infectious diseases are among the risks that have the greatest impact (O'Callaghan-Gordo & Antó, 2020). As the WEF notes: "Considerable progress has been made since the Ebola epidemic in West Africa in 2014–2016, but health systems worldwide are still under-prepared for significant outbreaks of other emerging infectious diseases, such as SARS, Zika and MERS. A recent first-of-its-kind comprehensive assessment of health security and related capabilities across 195

^{*} Corresponding author.

E-mail addresses: norgeo@ci.uc.pt (N. Santos), claudete@fl.uc.pt (C. Oliveira Moreira).

countries found fundamental weaknesses around the world: no country is fully prepared to handle an epidemic or pandemic. Meanwhile, our collective vulnerability to the societal and economic impacts of infectious disease crises appears to be increasing.” (ibid., p. 76).

According to Sobrosa Neto, Sobrosa Maia, de Silva Neiva, Scalia, and Guerra (2020) the magnitude of the disruption caused by COVID-19 can be compared to that caused by World War II, and they see this as the emergence of a new era catalyzed by a virus: “the fourth industrial revolution in our world”, marking the integration between the physical, digital and biological spheres. The COVID-19 pandemic has had very negative impacts in many economic domains. Activities related to travel, tourism and leisure have been particularly touched because they involve mobility and social contact. In general, COVID-19 has affected, is affecting and will certainly affect consumption levels of the most diverse services over the next year (Marques Santos et al., 2020), especially in societies where the growth-paradigm is centrally oriented (Sigala, 2020; Ötsch, 2020).

We know that “planning can be conceived as a set of ideas and principles that seek to control the spatial distribution of human activities over time” (Rahmafritia et al., 2020), in accordance with the interpretations of (Gunn & Var, 2002; Hall, 2008) and (Inskip, 1991). In the face of this crisis, tactics and strategy seem to have overlapped and “there is an [sic] unanimous call to see and use pandemic as a transformative opportunity” (Sigala, 2020), because a new normal or “the next normal and economic order” must be created at once (Sigala, 2020; Gössling et al., 2020; Ioannides & Gyimothy, 2020).

Indeed, tourism needs a resilient approach (Cochrane, 2010), because by allowing a systemic perception capable of coping with adversity it facilitates adaptability, response and the evolutionary process, under both extraordinary circumstances and incremental changes (Lew, 2014; Paiva & Santos, 2020). Cochrane (2017) states that the concept of resilience results from the complexity of socio-economic systems, “which do not evolve in a linear progression, but according to a cycle, which implies that after a disruptive event, the system does not return to its initial state, but evolves to a different one” (Paiva & Santos, 2020). In the case of the COVID-19 crisis, it is the expectation of an opportunity for transformation and the existence of another normal (Atejevic, 2020) that leaves some hope for a recovery with a positive projection and creation of added value in the medium term. We agree with Sharma et al. (2021) who clearly take this position when they state that “with the help of the resilient approach from governments, market players, technology innovators, and the workforce employed in the industry, the tourism sector may end up evolving in a much more sustainable way, post-pandemic” (Sharma et al., 2021). In this way, with stakeholder partnerships, governments could engage with the private sector, community and academia (Carayannis & Campbell, 2009; McAdam, Miller, McAdam, & Teague, 2012; Fitjar & Huber, 2015; Miller, McAdam, Moffett, Alexander, & Puthusserry, 2016; Lew, Khan, & Cozzio, 2018) and jointly create new mitigation processes and resilient collaborative approaches (WTTC, 2020).

This article focuses on a southern European tourist destination, Portugal. As a research methodology it favors the case study. Thus, the tourist destination is presented, focusing on its comparative and competitive advantages, as well as its positioning. The importance of tourism for Portuguese social economics is highlighted, as well as the growing internationalization of the tourist destination. The growth of tourism in the destination is highlighted by analyzing the evolving trend of some indicators. The solid growth of tourism activity is framed in the context of public policy. The main objective is to realize that the restrictive government measures imposed during the pandemic have had an impact on some economic activities typical of tourism. For this purpose, we have analyzed inter-month and year-on-year variations and territorial inequalities in some indicators. Finally, the adaptive mechanisms adopted in the management of the tourist destination are highlighted.

2. Methodology

2.1. Case study: Portugal as a tourist destination

The case study as a scientific research technique favors the analysis of a geographically defined and temporally delimited reality. In this article *the case* is a European tourist destination: Portugal. The analysis dates back to the 1980s, when the destination joined the current European Union, but covers the first two decades of the twenty-first century, finally focusing on the years 2019 and 2020 to understand the impact of COVID-19.

Portugal, an Atlantic tourist destination located in southern Europe, has become one of the most competitive destinations in the world (Moreira, 2016). The destination in the Iberian Peninsula is made up of mainland Portugal and two Atlantic archipelagos: the Azores and Madeira.

In 2019 Portugal was the twelfth most competitive tourist destination in the world, considering 140 countries (WEF, 2019). Tourism is extremely relevant for the Portuguese social economy. Travel and tourism have been increasingly important in Portugal’s exports of goods and services, representing 19.4% in 2019. This importance has grown gradually and consistently since 2013 (Fig. 1). Tourism has contributed to the internationalization of Portugal’s economy, to the international projection of the destination Portugal brand and to the reinforcement of the destination’s image. The number of international tourists has been steadily increasing, with the most significant growth since 2012 (Fig. 2). The income from international tourism follows this growth trend, which is the result of diversifying and enhancing the offer of tourism products and services.

In the twenty-first century the national tourism system has become more densely populated with public and private agents, investment in equipment and infrastructure geared to tourism has been strengthened and better dispersed territorially. The number of tourist developments has increased, particularly the number of local accommodation establishments, which has grown significantly since 2012, with a steady increase in the number of overnight stays (Fig. 3). Private investment in tourism-oriented activities has contributed to greater territorial cohesion. Although the supply is growing in the coastal and metropolitan areas of Lisbon and Porto, as well as on the south coast, the Algarve, it has been strengthened in the medium-sized and smaller towns and cities in the interior of mainland Portugal, in the border areas in the north (northwest) and in the Alto Alentejo. Investment in hotels in fact reflects this (Fig. 4). In Portugal the tourist offer has been upgraded. The political, economic, social and environmental sustainability of tourism has been appreciated. External promotion campaigns were run in numbers unheard of in the history of tourism in Portugal (Santos, 2018). A considerable number of international events were organized, especially cultural and associative ones, with Portugal being in 11th place worldwide in the case of the latter (International Congress and Convention Association). There was a very significant investment in creating *venues* in medium-sized cities. Local tourist markets were consolidated and tourist markets (Brazil, United States, China, Russia, Scandinavian countries) expanded, in a strategy of diversification to avoid excessive dependence on traditional source markets (Moreira, 2018). The comparative advantages of the destination are varied, but among them the heritage resources deserve special mention. Some monuments of the cultural heritage were recognized as being of exceptional universal value by UNESCO in the 1980s. Integration in the European Economic Community (Fig. 5) would have dictated the political will to establish the proposals then included on the Representative World Heritage List. Although the 1990s and the first decade of the twenty-first century put forward more Portuguese heritage to be stamped with the seal of UNESCO, it is in the next ten years, a period in which Portuguese tourism is projected across the world, that Portuguese goods, both tangible and intangible, are included in the UNESCO lists, with 11 heritage elements deserving this recognition. Within the intangible

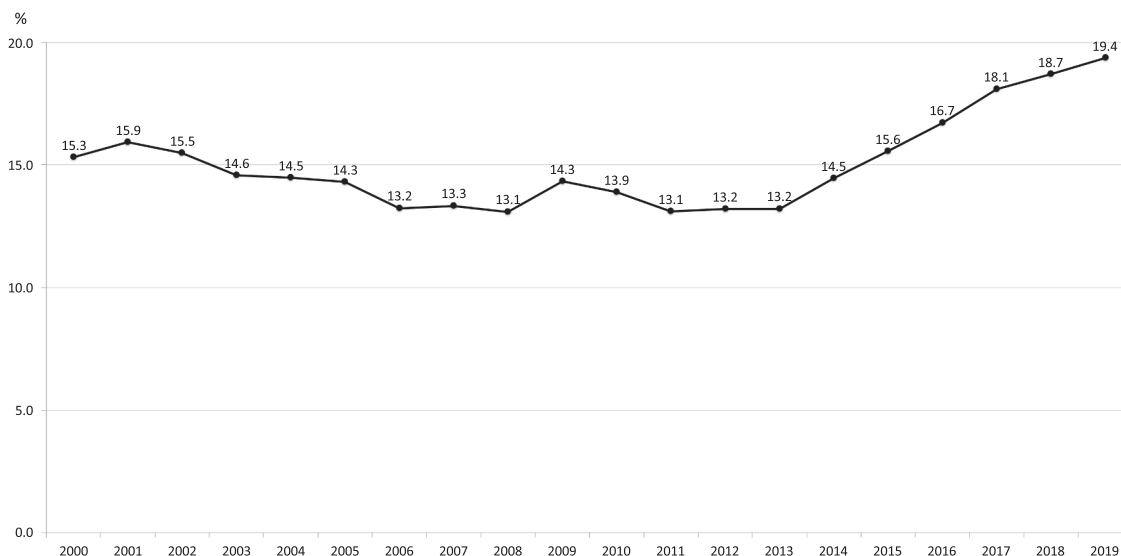


Fig. 1. Importance of tourism in exports of goods and services in Portugal from 2000 to 2019. Source: Banco de Portugal.

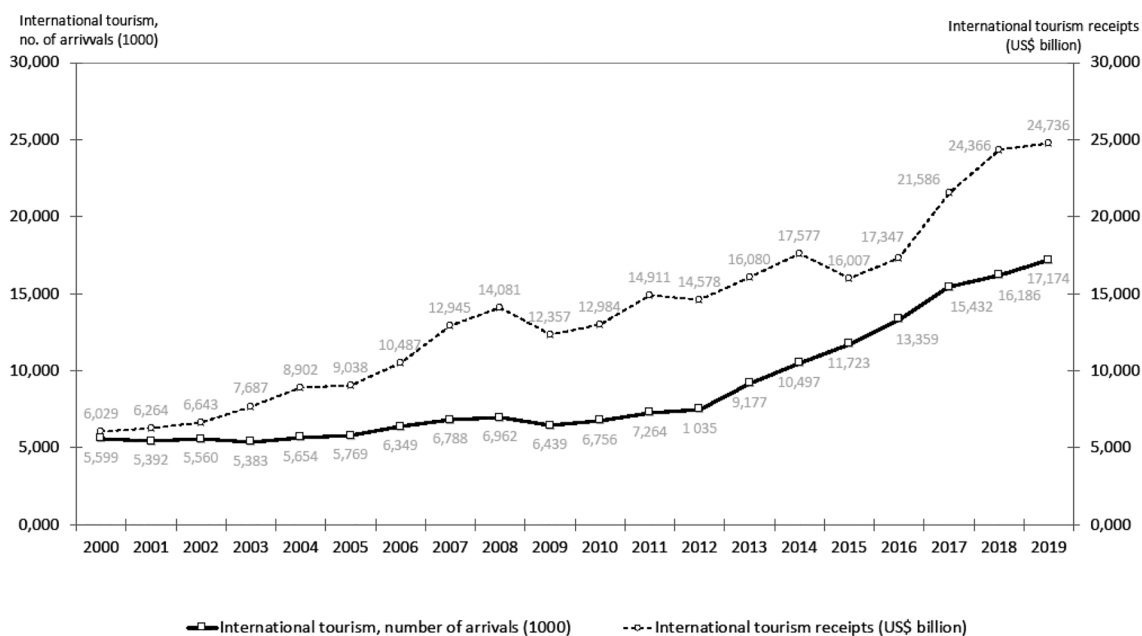


Fig. 2. International tourism, number of arrivals in Portugal and receipts, from 2000 to 2018. Source: The World Bank, World Tourism Organization, Yearbook of Tourism Statistics, Compendium of Tourism Statistics.

cultural heritage, we highlight Fado, the Mediterranean diet, the Podence winter carnival festival, the manufacture of cowbells, the production of clay dolls in Estremoz, the production process of black pottery in Bisalhães (Fig. 5), a heritage at risk which needs urgent safeguarding. This appreciation of heritage has sparked the demand for tourism, encouraging its territorial dispersion, emerging within the framework of public policies aimed at tourism. The deepening of both is evident in the second decade of the twenty-first century.

2.2. Public policies for tourism in Portugal

Tourism in Portugal in the first decade of the twenty-first century has been given special attention in public policies and governance agendas. It has become a strategic vector for the Portuguese economy. This assumption stems from the fact that it is endowed with the capacity to

create, in addition to wealth and jobs, the recovery of the image of the territories, the resurgence of values, customs and traditions, and the improvement in the quality of life of the local people. However, to achieve these goals, there had to be a profound change in the way of thinking about tourism. This change took shape in a series of public policies known as National Strategic Tourism Plans, which brought Portuguese tourism to levels of high quality of supply, now acknowledged internationally.

This is an economic activity where competitive advantages are easy to see, even becoming conspicuous, to the point of being an instrument of territorial cohesion, a goal which is very hard to pursue. The commitment made in terms of public policies is accompanied by the enthusiastic welcome from stakeholders, public and private, academia and local communities.

Gaining visibility since the post 1970s, as mentioned above, tourism

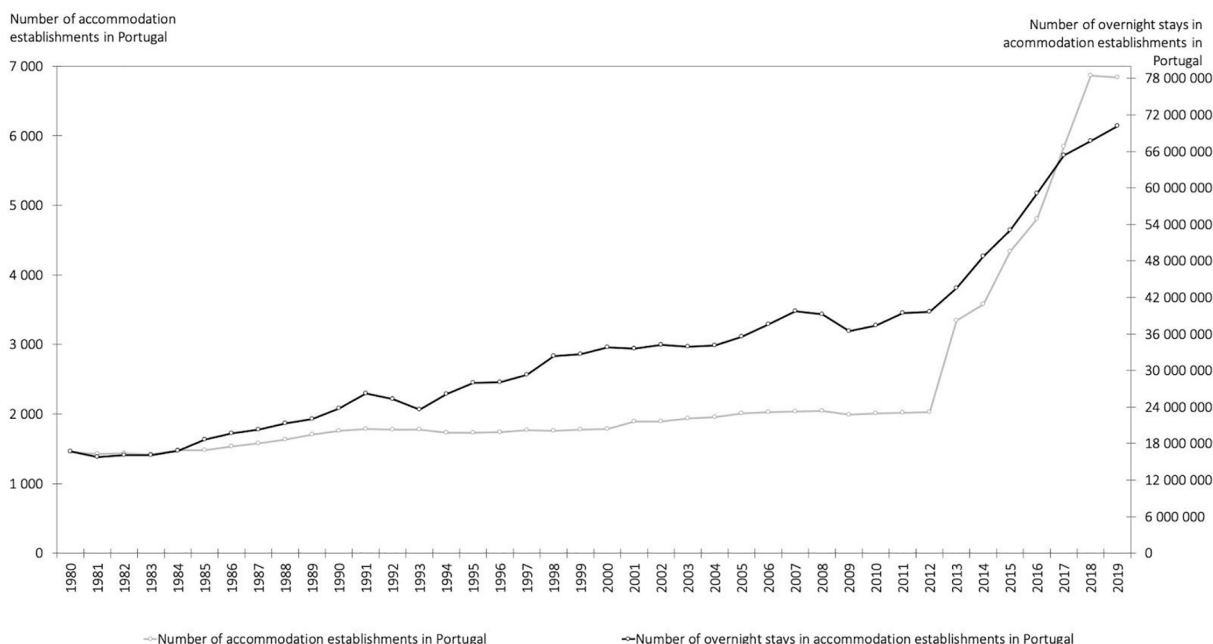


Fig. 3. Number of accommodation establishments and number of overnight stays in Portugal, 1980–2019. Source: Instituto Nacional de Estatística, Lisbon.

gained projection with the 2007 National Strategic Tourism Plan [Plano Estratégico Nacional do Turismo, PENT] (MEI, 2007). “Approved by Resolution of the Council of Ministers 53/2007, of 4 April, developed for the 2006–2015 time horizon (...) for the sustained growth of national tourism (...) there [having been] created a public entity with the goal of promoting the development of tourism: the Instituto de Turismo de Portugal, I.P. (Turismo de Portugal)” (Santos, 2014, p. 78). In Portugal, a systemic process was taking off that would see the country affirmed as a tourist destination of excellence in the following decade. The Plan sets out objectives and strategic development lines organized into 6 strands (Territory; Destinations and Products; Brands and Markets; Classification of Resources; Distribution and Marketing; Innovation and Knowledge) (MEI, 2007). The value proposition (Table 1) differentiates the destination by climatic features (sun, mild temperatures, sea and mountains), culture - which includes preserved customs, habits and traditions along with a history that takes us from beauty to chills -, its people, its facilities and its professionals, all of this in a small country with an area of 92,212 km². These differentiating elements intersect with very high levels of safety, authenticity and competitive quality, with a high-quality offer at competitive prices.

Lisbon, Algarve, and Porto and the North furnish the highest absolute contribution to the growth of national tourism, in the order of 2.5% (MEI, 2007). Some territorial cohesion between regions and poles is beginning to be felt, with a reduction in seasonality. The products that will support the strategic development at national level are defined in order to consolidate supply (Table 1).

These 10 products (Sun and Sea; Touring; City Breaks; Business Tourism; Nature Tourism; Golf; Nautical Tourism; Residential Tourism; Health and Wellness; and Wine and Gastronomy) are associated with an ambitious strategic vision and will serve to guide tourism planning in Portugal, with a special emphasis on cultural touring, perceived throughout the country, except in Algarve. Here it is Sun-and-Sea that prevails, with the offer of City-breaks in Lisbon and Porto, and Nature Tourism in the island territories, in Porto and North, and in the Central Region, also being first rate.

The aims are to (i) make Portugal one of the fastest growing destinations for tourism in Europe, (ii) have a development based on classification and competitiveness, and (iii) turn tourism into one of the drivers of the national economy (MEI, 2007). Although this

aggressiveness has had an effect over the last 15 years, some excess investment in tourism, to the detriment of other activities, especially industrial ones, has left the country weaker in the face of the huge recession caused by the COVID-19 pandemic, with its effects on tourism and the services that support it (accommodation, entertainment, transport and catering).

Besides the regional tourism division (Porto and North, Centre, Lisbon, Alentejo, Algarve and Regional Authorities of Madeira and Azores; which overlap with the Portuguese administrative regions), in view of the resources and specific factors of some territories, centers have been created (Douro, Serra da Estrela, West, Alqueva, Alentejo Coast and Porto). Ministry of Economy and Innovation [Ministério da Economia e Inovação] (2017) assumes that it is intended “to share with the tourist moments of Portuguese history and culture, literature, music or others, depending on the context. It is also intended to develop and adapt elements of the cultural offer that can provide tourists with distinctive experiences, to improve the marketing of the museum and monumental offer - adjusting opening hours and combining the offers - and to reinforce the concept of the richness of Portuguese gastronomy by creating reference dishes” (MEI, 2007).

This strategy has borne fruit which is reflected in the years that followed, in (i) the organization of major events, (ii) the political will to see Portugal’s Monumental and Intangible Heritage recognized worldwide, (iii) the enhancement of food heritage and wine tourism in Portugal, (iv) the quality of human resources in tourism, and (v) the value of sustainability expressed in the preservation and qualification of natural and cultural landscapes.

As foreseen, it would be essential to pay attention to revising the Plan. The strategy for tourism in Portugal (MEE, 2013) was to be reviewed between 2013 and 2015. Thus the revision of the tourism development plan for 2013–2015 was carried out under the XIX Constitutional Government. The innovating element was to align tourism with the principles of sustainable development with a focus on the distinctive elements of the country. This would happen based on quality of service and competition in supply. Here, the ease of offering authentic content and genuine experiences, with high quality human resources, gains significance. The importance of tourism in the economy and in social and environmental development at regional and national level is assumed.

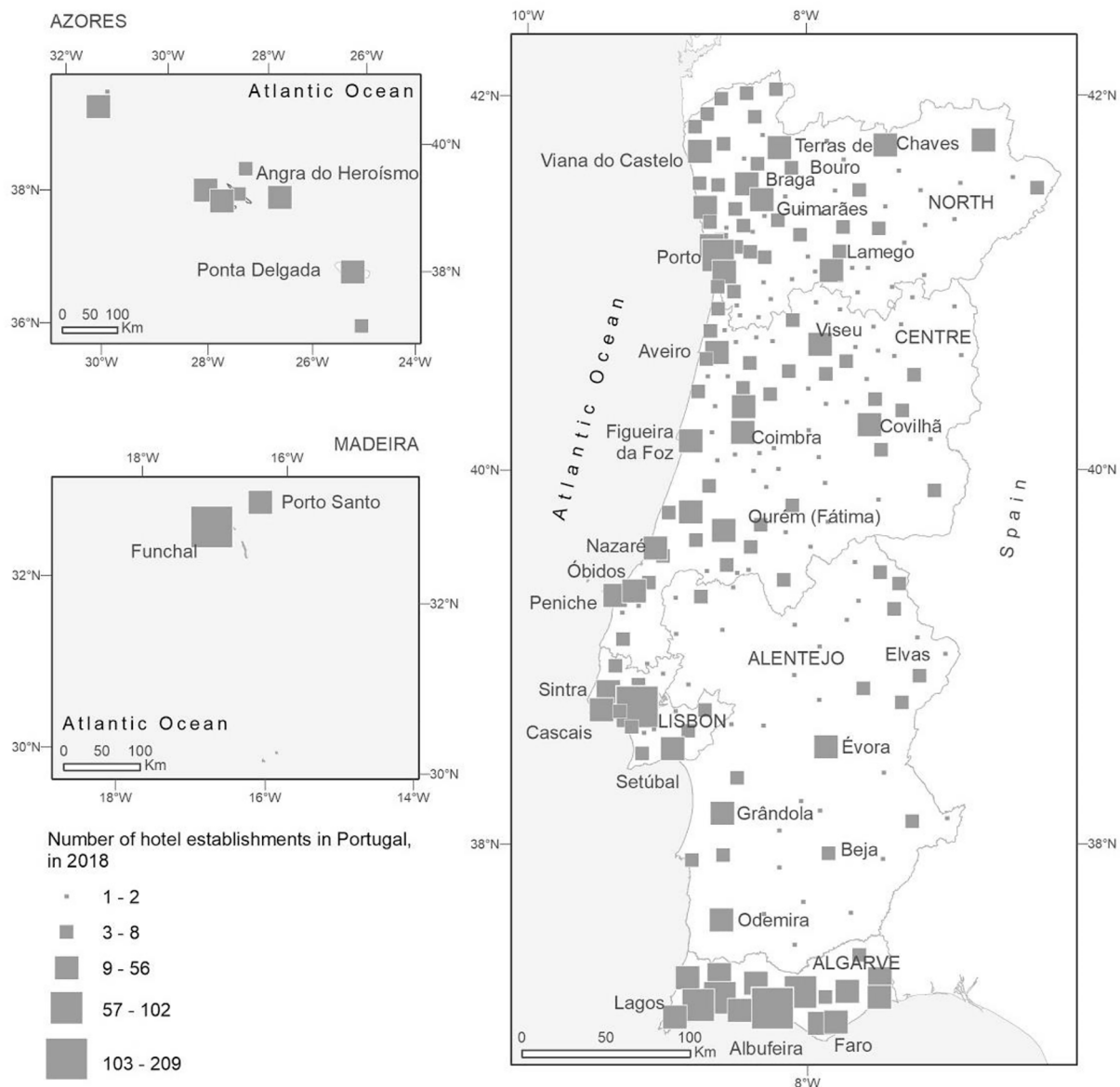


Fig. 4. Number of hotel establishments in mainland Portugal by municipality and in the archipelagos by island in 2018. Source: Instituto Nacional de Estatística, Lisbon.

The strategy is maintained in general, with the 10 products previously defined, but with adjustments that would allow for a more robust external perception, at national and regional levels alike (Table 2). To respond to international demand, benefiting the existing national demand, there is a “concentration of efforts, avoiding scattering into low-impact actions [classifying products] as: P) Consolidated product: organized supply, primary demand and object of external promotion; D) Product under development: supply structuring, primary demand, and object of external promotion; C) Complementary product: endorses and enriches supply and corresponds to satisfying a secondary travel motivation, and E) Emergent product: requires structuring for action in the medium term” (MEE, 2013).

This has been achieved with a greater segmentation of the offer of nature tourism, nautical tourism, and health and wellness tourism, together with cultural touring, where religious tourism is becoming popular. The combined approach also gains interest (MEE, 2013) in the tourist complexes, with a broadening of the residential tourism offer, and promotion of the natural, landscape and cultural offer, with the aim of enriching the product. Special attention is also reserved for the

Portuguese Communities, which number over 5 million people (mostly based in France, Switzerland, USA, Brazil and Canada). As they maintain priority and positively segregated relationships, they may represent more than 1 million trips (MEE, 2013). The whole strategy converges towards sustainable development (economic: upskilling of human resources and the product; innovative: seasonality management models; urbanism: authenticity expressed in the preservation and enhancement of heritage and public spaces; the environment: with the rational use of resources and natural heritage; and landscapes: promoting tourists’ relationships with places, communities and the territory) with the purpose of exceeding expectations and giving tourists an “overall experience of the visit” (MEE, 2013)

The plan, for the period between 2014 and 2020 [Turismo, 2020] (TP, 2015), was innovative because it gave more meaning to tourists’ motivations than to strategic products, while never failing to give them maximum attention. Stakeholders’ freedom of choice has increased in terms of decision making in order to better “respond to demand motives as opposed to the temptation to impose on tourists what we believe is best for them” (TP, 2015) (Table 3).

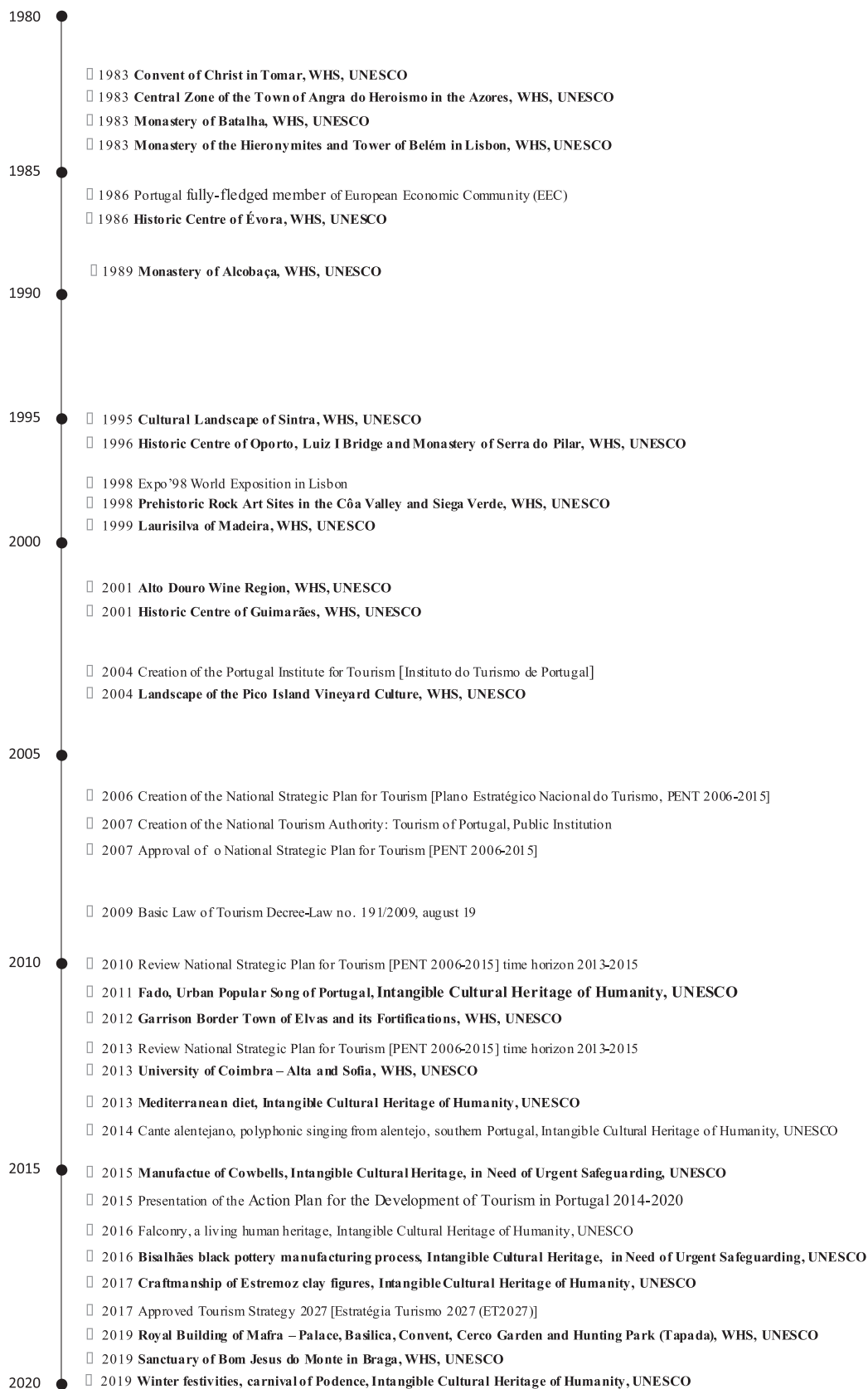


Fig. 5. Chronological sequence of Portuguese cultural, natural and intangible heritage recognized by UNESCO and public policies in Portugal, 1980–2020.

Table 1
Matrix of strategic products, according to the Regional Tourism Areas and in the archipelagos.

| | Algarve | Lisboa | Madeira | Porto and Norte | Centro | Açores | Alentejo |
|-----------------------------|-----------|-----------|-----------|-----------------|-----------|-----------|-----------|
| Sun and sea | 1st level | 3rd level | 2nd level | | | | |
| Touring | | 1st level | 1st level | 1st level | 1st level | 2nd level | 2nd level |
| City breaks | | 1st level | | 1st level | | | 1st level |
| Business tourism | 2nd level | 2nd level | 3rd level | 3rd level | | | |
| Nature tourism | | 4th level | 1st level | 2nd level | 2nd level | 1st level | |
| Golf | 3rd level | 3rd level | 4th level | | 3rd level | 4th level | 3rd level |
| Nautical tourism (Cruises) | 4th level | 3rd level | 3rd level | | | 3rd level | 4th level |
| Resorts/Residential tourism | 4th level | | 4th level | | 3rd level | | 3rd level |
| Health and wellness tourism | 4th level | 4th level | 3rd level | 4th level | 4th level | 3rd level | 4th level |
| Gastronomy & wines | | 4th level | | 3rd level | 4th level | | 3rd level |

Source: Adapted from MEI (2007, p. 75).

Table 2
Matrix of products versus destinations in Portugal.

| | Algarve | Lisboa region) | Lisboa (city) | Madeira | Norte (region) | Porto (city) | Centro | Alentejo | Açores |
|----------------------------|----------------------------------|---------------------------------------|----------------|----------------------------------|----------------------------------|----------------|--------------|--------------------------|----------------------------------|
| Sun and sea | P | C | | D | | | C | C | |
| Touring | C | P religious P pilgrimage | P Short breaks | P | P religious | P Short breaks | P | P | D |
| City breaks | | | P | | | D | | | |
| Business tourism | D | | P | | | D | | | |
| Golf | P | | | C | | C | | | |
| Nature tourism | D birdwatch | C walk.tours D equestrian D birdwatch | | P walk.tours | D walk.tours D equestrian | | D walk.tours | D equestrian D birdwatch | P walk.tours birdwatch |
| Nautical tourism (Cruises) | D recreational boating D surfing | D recreational boating D surfing | | D recreational boating D surfing | E recreational boating D surfing | | E surfing | D surfing | D recreational boating E surfing |

Key - P: Consolidated Product; D: Product under Development; C: Complementary Product; E: Emergent Product.

Source: Adapted from National Strategic Tourism Plan, Horizon 2013–2015 (MEE, 2013).

Table 3
Motivations vs Products Matrix in Portugal, 2014–2020.

| | Motivations | | | | |
|------------------------------|------------------|------------------|----------------|------------------|-----|
| | Culture (máx. 3) | Pleasure (máx 4) | Relax (máx. 4) | Physical (máx 3) | Sum |
| Sun and sea | | 3 | 4 | 3 | 10 |
| Touring | 3 | 3 | 1 | 1 | 8 |
| City breaks | 3 | 3 | 1 | | 7 |
| Business tourism | 1 | 2 | | | 3 |
| Golf | | 2 | 1 | 3 | 6 |
| Nature tourism | 1 | 2 | 3 | 3 | 9 |
| Nautical tourism (Cruises) | | 4 | 1 | 3 | 8 |
| Resorts/ Residential tourism | | 1 | 3 | | 4 |
| Health and wellness tourism | | 1 | 2 | | 3 |
| Gastronomy & wines | 3 | 4 | 4 | 3 | 14 |

Key - **Culture**: 1. Culture and Religion, 2. Knowledge, 3. Local costumes; **Pleasure**: 1. Living, 2. Adventure, 3. Fun, 4. Break the routine; **Relax**: 1. Welfare, 2. Family, 3. Rest, 4. Enjoy the weather; **Physical**: 1. Contact with nature, 2, Sport, 3. Active life. Source: Adapted from Tourism (2020, p. 59).

“Tourism is experiencing fierce and growing competition on a global scale and is particularly subject to new trends of change: socio-demographic, economic, environmental, technological and in transport” (TP, 2015). It is essential to pay attention to the Person, because if the focus is on demand, supply will be created when the conditions are in place; to Freedom, since if we have to attract, captivate and make the tourist dream, we have to focus public policies or focus them precisely

where tourists circulate, thus forcing an adaptation to the digital economy; to Openness, creating conditions for adaptation to change; to Knowledge, to significantly improve the level of knowledge that is produced and put at the disposal of the sector’s agents; and to Collaboration, due to the interdependence between multiple action plans and the cross-cutting nature of the tourism activity (TP, 2015). The strategy, in terms of public policy, was definitely aimed at the tourist and an “excellent offer of the country at the level of some of the ‘secondary’ motivations of tourism (...), resulting from a strong qualification in recent years” (TP, 2015). This qualification arises at the level of specific tourism segments, such as nature, boating and seamanship, health, religion, events, business and gastronomy and wines, which require more specialized and complementary skills in the tourism supply.

The last strategic plan presented - Strategy for Tourism 2027 - was also innovative and reclassified the products into differentiating, qualifying and emerging assets (Fig. 6), aggregated around *People*, regarded as a cross-cutting asset. Taking up a more Keynesian logic, the strategy proposes to “Lead the tourism of the future”, focused on 10 assets - organized around *People* - aiming to position Portugal as a competitive and sustainable destination, on a level with the world’s finest (ME & TP, 2017). Priorities are established, with the following lines of action: (i) appreciating the territory; (ii) boosting the economy; (iii) enhancing knowledge; (iv) generating networks and connectivity; (v) projecting Portugal on the path of previous national tourism strategies (MEI, 2007; MEE, 2013-2015; TP, 2020). It is therefore not surprising that the commitment to sustainability is present and well defined economically (increases in demand and growth in value), socially (reducing seasonality, promoting tourism training and safeguarding the positive impact on indigenous populations) and environmentally (adopting measures for the efficient use of water, energy and waste management among tourism stakeholders) (ME & TP, 2017).

The ten strategic assets of national tourism: people; climate and light;

| STRATEGIC ASSETS | | |
|----------------------------------|--|------------------------|
| UNIQUE TRANSVERSAL ASSET | | |
| 1. PEOPLE | | |
| DIFFERENTIATING ASSETS | QUALIFYING ASSETS | EMERGING ASSETS |
| 2. Climate and sunlight | 7. Gastronomy and wine | 9. Well-being |
| 3. History, culture and identity | 8. Artistic-cultural, sports and business events | 10. Living in Portugal |
| 4. Sea | | |
| 5. Nature | | |
| 6. Water | | |

Fig. 6. Strategic assets of Tourism in Portugal. Source: Adapted from *Estratégia Turismo 2020* (ME & TP, 2017).

history and culture; sea; nature; water; gastronomy and wine; artistic-cultural, sports and business events; wellness; living in Portugal (Fig. 6), highlight the quality of resources as well as the value chain and diversity of the offer, always relating to welcoming. This is because “welcoming in Portugal is not mere marketing: it is culture, it is attitude, it is identity. It is a universalist vocation that expresses a genuine interest in learning about other cultures, and valuing difference and understanding with other peoples; our desire and capacity to value human relationships, expressed in the way we relate to others, is consistently recognized by those who visit us. People are thus a unique and transversal asset, with particular importance in tourism - an activity of people for people” (ME & TP, 2017).

2.3. Data collection

The case study draws on multiple sources to collect data, which are processed to carry out the study. According to Veal (2018) “the use of a variety of types of data and types of analysis can be said to be a key feature of the case study method”. The case study presented here combines data from the World Bank, the Bank of Portugal and the National Institute of Statistics for their relevance in monitoring tourism and its characteristic and related economic activities. The data presented in several indicators consider the year-on-year change (2019–2020); in addition to the care taken in compiling time series on domestic and international tourism (arrivals and revenues), on the number of accommodation establishments and overnight stays, reference is made to travel and tourism in the context of exports of goods and services.

3. Findings and discussion. Portugal as a tourist destination in the COVID-19 period

To reduce the impact of COVID-19, several measures were taken in different countries, some drastic (Fotiadis, Polyzos, & Huan, 2021), sometimes with underestimated situations (Skare et al., 2020), others seeing tourism as a major cause and transmitter of the new COVID-19 (Sharma et al., 2021; Sigala, 2020). As Fotiadis et al. (2021) put it, there was a need to “[lock] down the entire country or the most affected cities and also by prohibiting entry to their borders, resulting in an immense hit for the global tourism industry, particularly the travel and hospitality sector. The COVID-19 outbreak has forced many tourism destinations to stop their operations following lockdown measures and travel bans, as well as cancelled bookings and limited logistics”. Portugal had to take measures, too, and on 18 December 2020 the Portuguese Government, implemented certain restrictions in an effort to reduce the effects of a major crisis with tourism in the eye of the hurricane.

General behavior guidelines were enacted (VisitPortugal, COVID-19), and people had to respect social distancing, wash their hands frequently, and observe the mandatory use of a mask and respiratory etiquette. The Clean&Safe seal, defined by Turismo de Portugal, allows tourists to have greater security and confidence in the use of accommodation establishments, in the various tourist services and tourist

attractions (VisitPortugal, 2020).

The Portuguese airports (Lisboa, Porto, Faro, Ponta Delgada and Funchal) have established several procedures in order to preserve staff and passenger safety. A body temperature measurement system is implemented on arrival. Likewise, passengers will be requested to fill out a form by the Health Authorities. This information will be used to contact passengers in the event that someone on the same flight develops COVID-19 symptoms. Otherwise, passenger boarding and disembarkation at Portuguese ports is not permitted, except for resident passengers. With respect to gatherings, the movement and concentration of groups of more than 5 people in private or public spaces is prohibited unless they belong to the same household. The same rule applies in the case of restaurants and cafés. In the case of restaurants, the limit is 6 people. The use of face masks is mandatory on public transport, where passenger numbers have been limited to 2/3 of the capacity; taxis and TVDE (individual and paid passenger transport of vehicles demarcated from an electronic platform) can only use the rear seats, and passenger occupancy cannot exceed 2/3 of this space. Museums, cultural spaces and leisure spaces, where the use of a face mask is mandatory, reopened after the first wave with specific circulation measures and social distancing, with marked seats, reduced capacity and compulsory physical distancing.

The effect of the pandemic on travel and tourism in Portugal is evident. The fear of travelling combined with the extremely restrictive government measures imposed on the different economic activities resulted in a sharp fall in all tourism activity indicators. The impacts are clear in accommodation establishments. In Portugal the marked decline in overnight stays (Fig. 7) has led to the closure of a great many hotels and guest houses. In December 2020, in Portugal, 45% of the hotels were closed (AHP, 2020).

Since 2013 (Figs. 7 and 8), two factors (seasonality and increase in the number of tourists) have ceased to be a contingency and are now structural in Portugal. In fact, the existence of seasonality is striking, since it continues to set the pace of attraction of tourists to hotels, both domestical and international visitors. Although the number of tourists visiting Portugal in the low season (October to March) has doubled to around 3 million, in 2020 the increase, in the high season, was significantly greater (close to double), even before the crisis caused by the COVID-19 pandemic. This increase, in both the low and high seasons, has been continuous (Fig. 7), reflecting public policies, governance, private and public sector investment and innovation. Internal and external campaigns have promoted the destination, the enhancement of Portugal’s international image, and the qualification of human resources, the international recognition of Portuguese resources and products, which gained the status of authenticity, identity and sustainability, the concentrated diversity of landscapes, heritage and tourism products, the relative safety of the destination, the presence of the national tourism authority, Turismo de Portugal, in twenty-five source markets.

In addition to these references, perceived as structural, until 2019 the COVID-19 pandemic forced a requalification of these elements, since

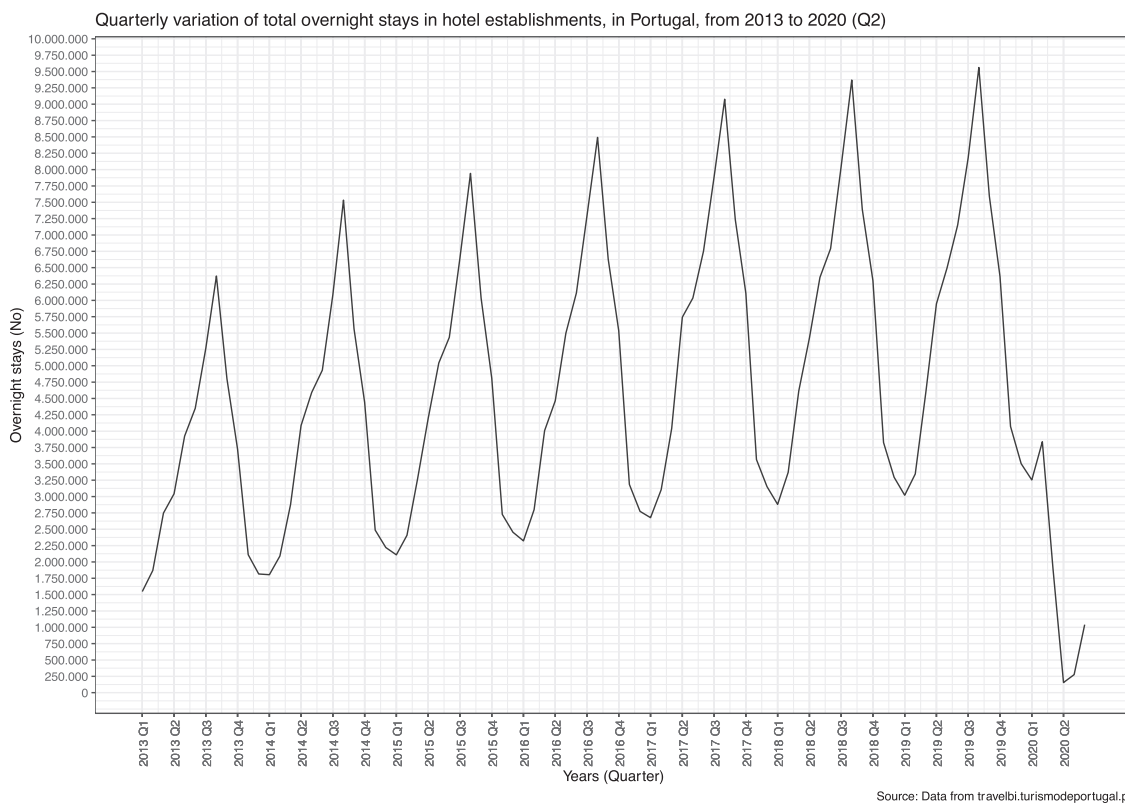


Fig. 7. Quarterly variation of total overnight stays in hotel establishments in Portugal, from 2013 to 2020. Source: From Santos (2018, p. 72), adapted and updated.

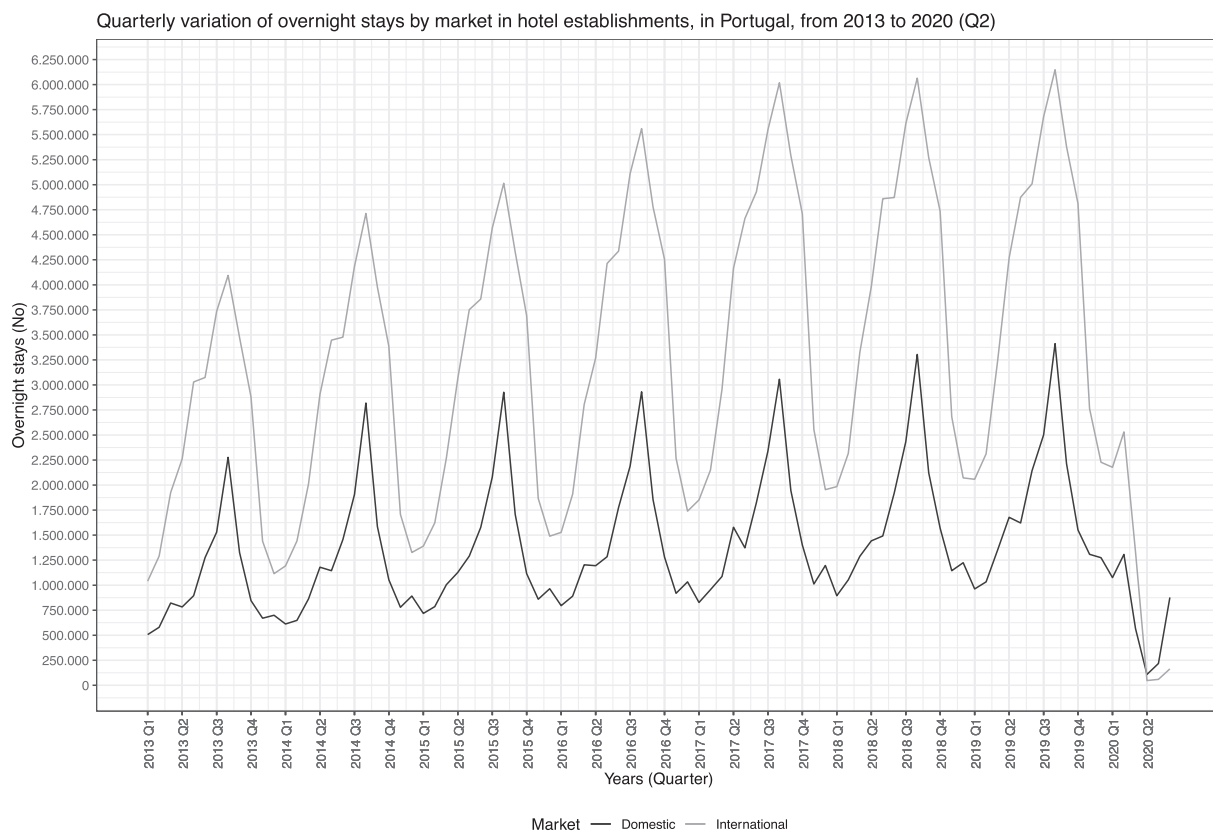


Fig. 8. Quarterly variation of total overnight stays by market in hotel establishments in Portugal, from 2013 to 2020 (Q2). Source: From Santos (2018, p. 72), adapted and updated.

the peaks were replaced by troughs (Figs. 7 and 8). This profound change requires a detailed analysis which is carried out below.

The Presidency of the Council of Ministers of Portugal enacted Decree-Law no. 17/2020, on April 23, with exceptional temporary measures relating to tourist activity, in the face of the virtual disappearance of tourists. It states that it will apply “to travel organized by travel and tourism agencies, to the cancellation of bookings in tourist resorts and local accommodation establishments and to relations between travel and tourism agencies, tour operators and tourist resorts and local accommodation establishments” (Decreto-Lei 17/2020), in view of the crisis that was looming.

The reading of Figs. 7 and 8 allows us to state at once that the slowdown, in this abrupt absence of tourists, begins with domestic tourism (Fig. 8). The proximity, the shortest time of stay, the security of the country, in the first wave of the pandemic, allowed the Portuguese to start their tourist trips, benefiting from less pressure on resources and attractions, more availability of human resources, in situations of ‘undertourism’. This was, in fact, a situation thought out in government terms, since an incentive of 50 million euros was launched on 29 September, to stimulate domestic demand, coordinated by Turismo de Portugal. This incentive covers reserves of tourist and gastronomic experiences throughout the country (Explora) which are joined by the platforms Click2Portugal, BookinXisto, Solares de Portugal, Schist Vilages and Tourism in Rural Space; the National Museums and Monuments managed by the Directorate General of Cultural Heritage and the train trips organized by CP-Comboios de Portugal (Publituris, 2020a), rounded off with the campaign #TuPodes - Visita Muito Por Pouco, supported by the government, with a contribution to bookings in the low season (Publituris, 2020b).

These steps, along with several others, appear in the face of the collapse that had occurred in terms of tourist demand and leisure visits, in a set of services that function as pillars of tourism (accommodation, transport, tourist entertainment and catering). In October the government forecasts began to emerge and refer to revenue shortfalls of between 50 and 60%, year-on-year (Publituris, 2020b), for the year 2020, with the Secretary of State for Tourism pointing out that there are conditions for the year 2021, 2022 to reach the figures not of 2017, 2018 and 2019, but of 2016.

3.1. Overnight stays

When analyzing the available statistical data (Featured, Information to the media, Tourist Activity, Monthly, INE) for 2020, it is easy to see that the upheaval in tourism in Portugal was very deep, does not seem

likely to recover quickly, and exposes the dependence of the Portuguese economy on tourism. In 2019, it was responsible for 52.3% of exports of services and 19.7% of total exports, with tourism revenues corresponding to 8.7% of national GDP (TP, 2020).

Fig. 9 immediately gives a clear picture of the extent of the changes caused by the pandemic. It should not be forgotten in January and February 2020, overnight stays exceeded those of 2019, but the total number of overnight stays up to October 2020 was 38,324,600 less (61.36% below 2019).

As we can see, the trend was not homogeneous; on the contrary, the figures are particularly low in April and May, a period in which the decrease in overnight stays was 96.12%, with almost all tourist activities halted. In fact, Fig. 9, which shows the year-on-year rate of change 2019–2020, shows this negative evolution, which it was thought could be offset at the peak of the high season (July, August), but this did not occur. The continued high number of infections, restrictions on the movement of people, and on air travel in particular, led Portugal to have figures for international tourist arrivals in August comparable to those it had in the 1990s.

When comparing the data according to the type of tourist accommodation (Fig. 10), taking into account the year-on-year rate of change (overnight stays 2019–2020), it is interesting to note that *rural and guest house accommodation* showed a higher growth trend in the first months of the year (January and February) than hotels and local accommodation (local lodging establishments; apartments booked on airbnb, booking or other similar websites). It also maintained a less negative variation than these, in the critical period after February. This finding indicates that this type of accommodation is emerging as an important alternative competitor, even in periods of crisis such as the one we are going through. It also shows that urban and rural as well as multiple-attraction destinations (the urban one acting as visiting hub for its hinterland) are part of the demand for tourist accommodation in Portugal. Smaller tourist resorts, with good accessibility and in low density areas have benefited from higher demand. In any case, the year-on-year variation in overnight stays remains extremely negative, with the recovery in August being particularly significant in rural areas, with accommodation *in rural areas and guest houses* recovering from minus 94.2% to minus 13.9%, but not being able to remain above that figure in the months that followed (September and October), although remaining well above the rate of variation in hotels (minus 48.9%) and local accommodation (minus 46.6%).

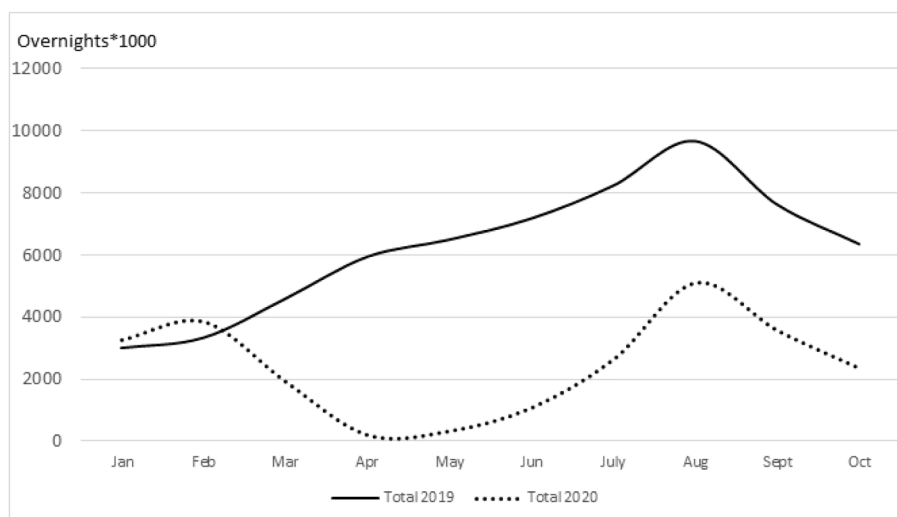


Fig. 9. Monthly total overnight stays in Portugal from January to October in 2019 and in 2020 Source: Instituto Nacional de Estatística, Lisbon.

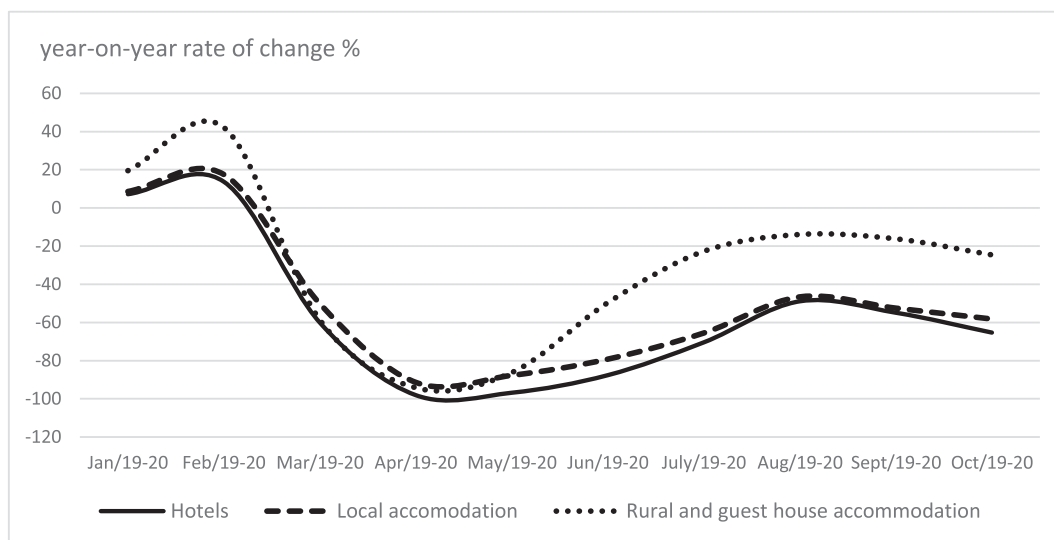


Fig.10. Year-on-year rate of change (overnight stays) in Portugal (2019–2020), by type of accommodation. Source: Instituto Nacional de Estatística, Lisbon.

3.2. Occupancy rate

Another indicator where the huge negative impact of the pandemic on tourism is demonstrated is the net occupancy rate (Fig. 11). When this variation is observed in the Regional Tourism Areas of the mainland and in the Autonomous Regions, a very approximate sinusoidal behaviour between them can be recognized. After a well differentiated regional occupation at the beginning of the year without the effect of the pandemic (Centre – 19.6%; Madeira – 45.4%; average in Portugal – 29.1%), the amplitude of variation diminished in October (January – 25.8%, October – 12.3%), indicating that the main regional tourist destinations were losing out to the traditionally less sought-after destinations. An evolution in line with that expressed in Fig. 11 is felt here, in relation to rural areas. The Regional Tourism Area of Alentejo has a value of 19.8%, in January, and 23.2%, in October, and it is the only Regional Tourism Area at the end of the period under analysis to increase the net rate of bed occupancy. This seems, therefore, to be a positive change, provoked by the pandemic, in allowing the peripheral areas to have more demand, in tourist terms.

It is not clear, however, that the overall analysis is positive (Fig. 12). In fact, when analysing the year-on-year rate of change, between 2019 and 2020, one can see a huge disparity in the values found. After parity in January and February, the variation reaches values between 41.4% and 38.5% less between April and July, making it impossible for a large

number of tourist accommodation establishments to keep their doors open. However, the above-mentioned economic situation continues (Figs. 13 and 14).

When comparing the annual rates of change of the main regional tourist destinations in Portugal (Algarve, Lisbon and Madeira - (Fig. 14) with those with lower attractiveness values (Fig. 13) - Centro and Alentejo) it is clear that the rates are less negative in these two regions. When comparing the average figures for the 10 months under analysis, it can be seen that while Lisbon, Madeira and Algarve show a variation of 37.21% less, 33.47% less and 26.56% less, respectively, Alentejo and Centre have smaller negative average figures 10.49% less and 14.81% less, respectively). This is a commonality that should be underlined. The lower density of the tourist supply, together with the smaller dimension of the tourist resorts and a closer and more intimate contact with nature (Spalding, Burke, & Fyall, 2021) help to explain these inter-regional variations.

The net occupancy rate per bed and average stay are two indicators with a significant inverse correlation, allowing for differentiated analyses. In fact, the average stay is an indicator (Fig. 15) that has values indicative of better attractiveness results of the destinations, during the most critical period. The number of day stays grew in the different tourist destinations, which in the case of Madeira and Alentejo provides a significant increase in values from before the pandemic (a rise of 346% and 115%, respectively). Growth also took place in the Centre, Algarve

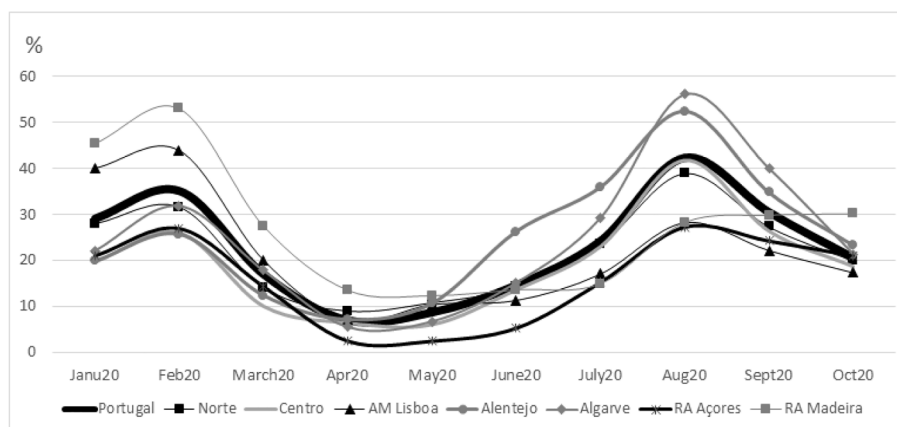


Fig. 11. Net monthly bed occupancy rate from January to October 2020 in Portugal by Regional Tourism Area and by Autonomous Region. Source: Instituto Nacional de Estatística, Lisbon.

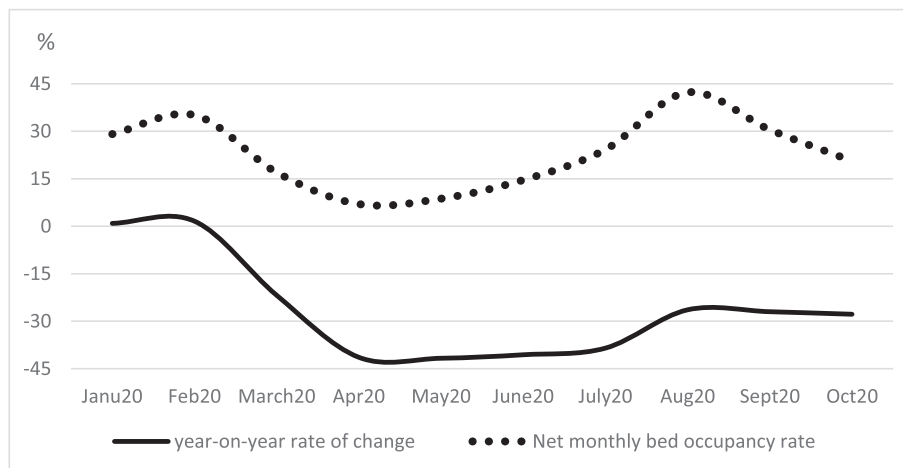


Fig. 12. Net monthly bed occupancy rate from January to October 2020 and year-on-year change from (2019–2020) in Portugal. Source: Instituto Nacional de Estatística, Lisbon.

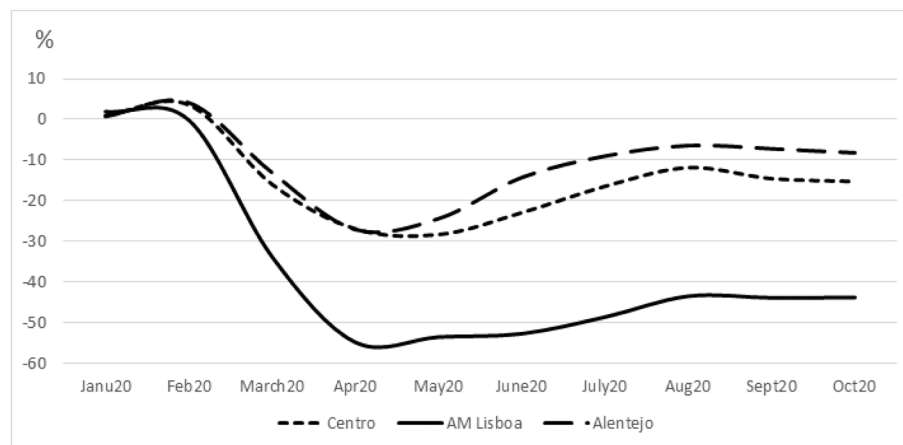


Fig. 13. Year-on-year monthly variation (January-October) of the net bed-occupancy rate in the Central Region Area, Lisbon and Alentejo, in Portugal. Source: Instituto Nacional de Estatística, Lisbon.

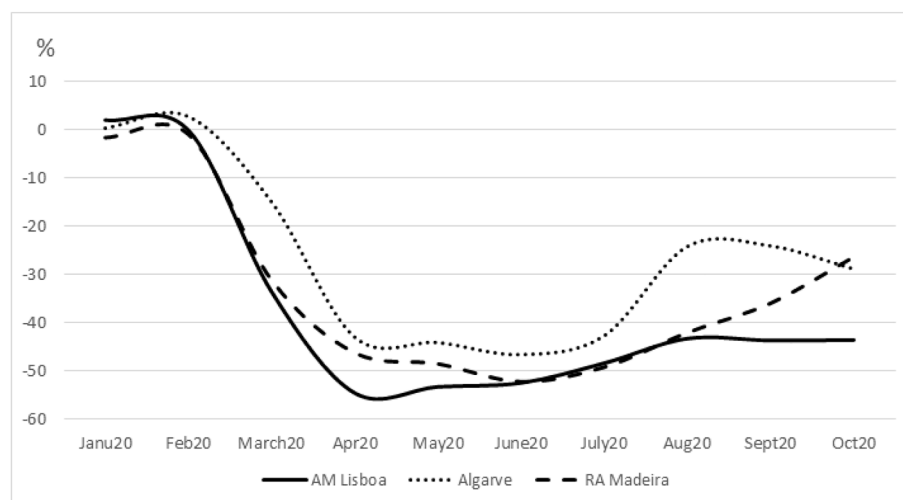


Fig. 14. Year-on-year monthly change in net occupancy rate per bed (2019–2020), in the Regional Tourism Areas of Lisbon and Algarve and in the Autonomous Region of Madeira in Portugal. Source: Instituto Nacional de Estatística, Lisbon.

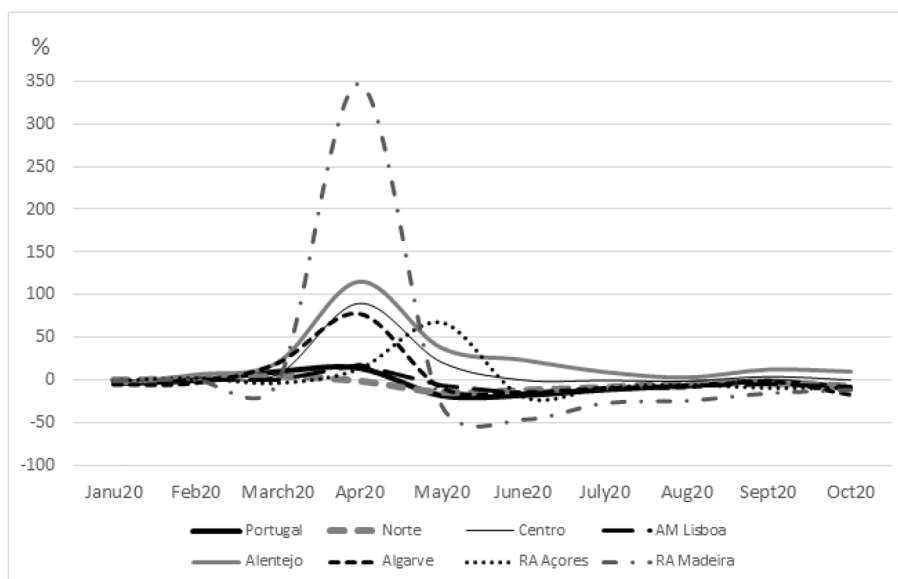


Fig. 15. Year-on-year monthly rate of change from January to October (2019–2020) of average stay in Regional Tourism Areas and island tourist destinations in Portugal. Source: Instituto Nacional de Estatística, Lisbon.

and Azores (this one in May), in any case due to the mobility restrictions (Cheshmehzangi et al., 2021) which, as the arrivals did not allow, conditioned the departures of those who were at the destination. These figures are also the result of the fact that the assessment is made on a very small number of tourists (the reductions exceeded 90%), probably those who were more motivated to travel and therefore stayed longer at the destination.

3.3. Income

In the face of such a negative set of indicators, it would not be expected that the profits from the activity would be positive. All the Regional Areas of Tourism and Autonomous Regions show an evolution with very low profits, with the Algarve reaching less negative values that contribute to the quantity reached in Portugal in August (Fig. 16). Once again, the profits for January and February (Fig. 17) began 2020 with a good omen, but these figures were quickly replaced by significant losses in the following months of the year, with an average year-on-year rate of change (2019–2020) in these eight months of 73.81% less, with the lowest figures in April (less 98.3%). It was thought that after the first wave there could be a recovery and tourism stakeholders could save the

year, but this did not happen. Although there was a reduction in the negative year-on-year rate of change in income, in fact, the second wave, which began to be felt in Central Europe and around the world before it reached Portugal, allowed for the arrival of international tourists in a small window of time, insufficient for the long-awaited recovery. Moreover, given the intensity of this second wave, the resumption of travel, so eagerly awaited by the entire population, was even more limited and the start of the low season will have been even earlier than usual. Only at the regional level significant changes are felt in the length of stay of tourists. The pandemic caused a positive change in April, with the length of stay reaching figures only achieved in July and August. However, soon afterwards, in May, there was a significant reduction that had continued into October, with a trend towards shorter stays than in 2019 (Fig. 18).

As a complement to the previous indicator, the comparison between the RevPAR (Average income Per Available Room) of 2019 and 2020 is added to this study. Fig. 19 provides an easy interpretation, corroborating the analysis previously carried out and proving that tourist accommodation is experiencing very difficult times and the recovery seems to be slower than what could have been expected at the end of the first wave. With an extremely intense second wave and the possibility of

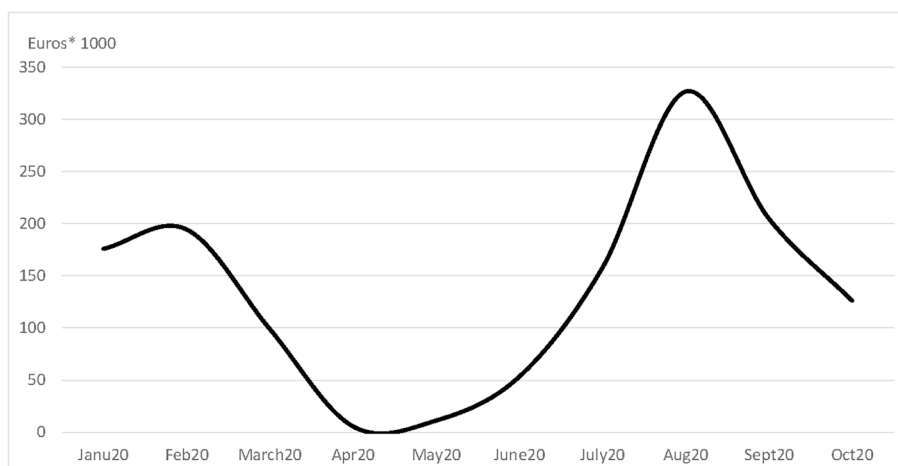


Fig. 16. Total monthly income per tourist accommodation in Portugal from January to October 2020. Source: Instituto Nacional de Estatística, Lisbon.

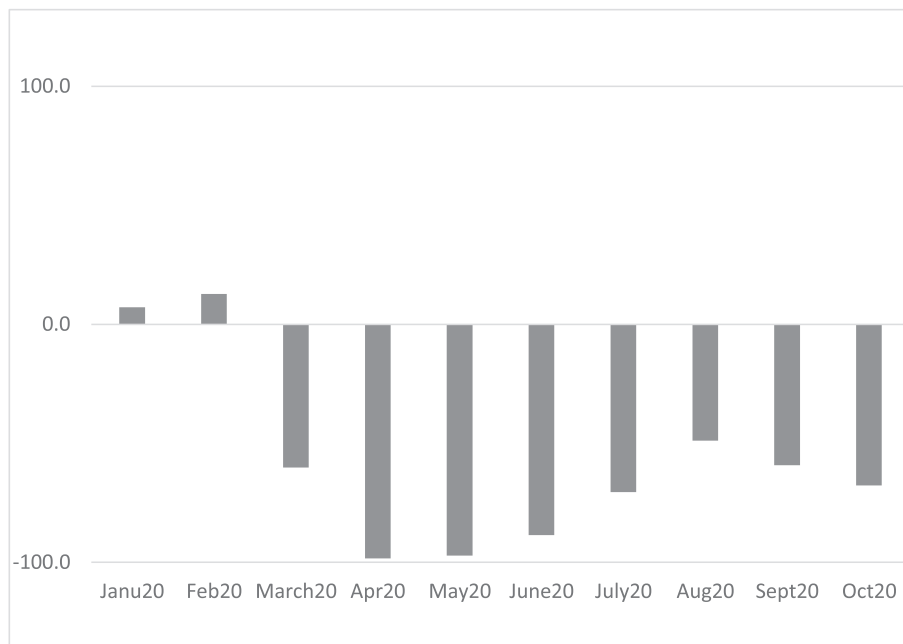


Fig. 17. Year-on-year rate of change (2019–2020) of total income in Portugal from January to October. Source: Instituto Nacional de Estatística, Lisbon.

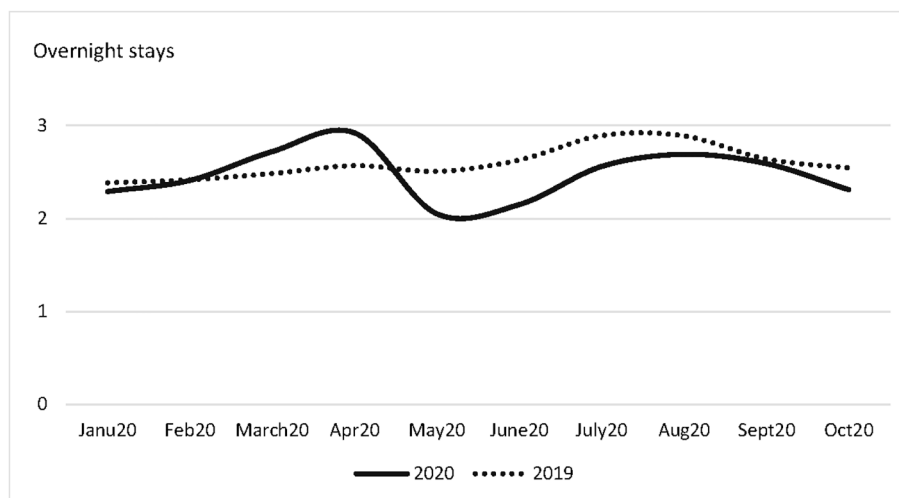


Fig. 18. Time spent in Portugal from January to October (2019–2020). Source: Instituto Nacional de Estatística, Lisbon.

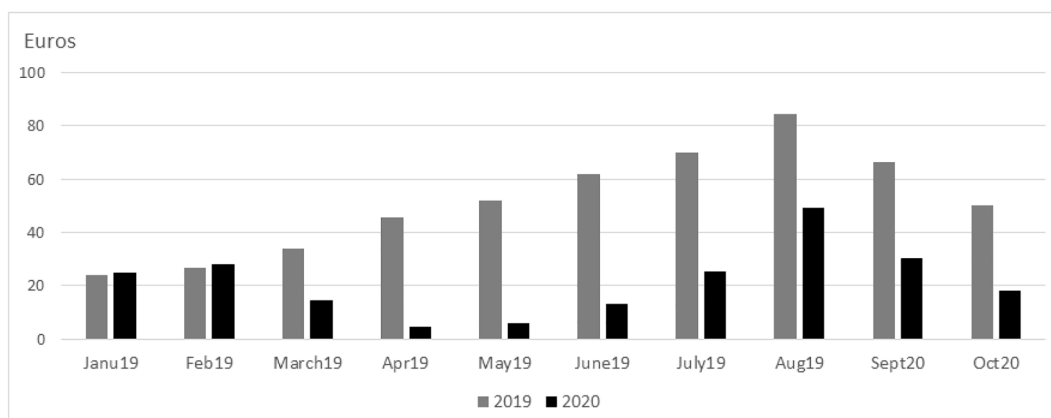


Fig. 19. Average income per available room in Portugal from January to October (2019–2020). Source: Instituto Nacional de Estatística, Lisbon.

a third wave, as long as vaccination does not allow group immunisation, the evolution of tourist accommodation income will remain at very low levels, combined with the tourist seasonality coinciding with the low season. As a result, the possibility of a rapid recovery of the various stakeholders is low, and many of the companies, especially the SMEs without liquidity, may be forced to close.

4. Conclusion

The proposals for the recovery of post-COVID-19 tourism and the ways forward are specified here. The research methodology values the case study of Portugal. The present case study combines data from the World Bank, the Bank of Portugal, and the National Institute of Statistics for its relevance in monitoring tourism, its characteristic and related economic activities. The data considers inter-month and year-on-year change change on domestic and international tourism (arrivals and revenues), on the number of accommodation establishments and overnight stays, and on travel and tourism in the context of exports of goods and services.

The COVID-19 pandemic affected the entire Portuguese population and its economy, in addition to culture, society, communities and families. Fewer mobilities, political control, high level of medical care, reduced transport, were fundamental to combat COVID19 (Cheshmehzangi, 2021). Therefore, in Portugal, the mobilities of people were restricted and sometimes prohibited - either to enter the country (international tourism) or to move between municipalities (domestic tourism) - deeply affecting tourism, because conditioned mobilities (with quarantines) were also a reason not to move.

The fear of traveling combined with the extremely restrictive government measures imposed on the different economic activities have resulted in a sharp fall in all indicators of tourism activity.

Since 2013 and until 2019, seasonality and an increase in the number of tourists were structural. Subsequently, the pandemic of COVID-19 forced a re-qualification of these elements, as the peaks were replaced by troughs. The slowdown, in this abrupt absence of tourists, begins with domestic tourism, as an incentive of 50 million euros was launched to stimulate internal demand.

In this way, accommodation and tourist transport were enormously shaken, despite government directives of specific support for these economic activities. However, catering/restaurants have also seen their function almost disappear due to the absence of customers and government directives. Similarly, visitors and residents who were quarantined or with mobility restrictions no longer used the catering facilities. On the other hand, the government has also imposed conditions on restaurants during the periods when they were open to the public. The same happened with tourist attractions and leisure activities, as the economic crisis was accompanied by social and psychological problems.

Tourist accommodation is going through very difficult times and the recovery is slower than what could be expected at the end of the first wave. It was thought that after the first wave there might be a recovery and that tourism stakeholders could save the year, but this has not happened. However, the government is committed to five (5) drivers to revive tourism from 2021 onwards: investment (through programmes such as REVIVE and Capitalise); territory (promoting the authenticity and identity of each place and paying attention to the motivations of tourists); connectivity (air, rail and road, paying attention to domestic tourism but also to exports, in the person of the international tourist); knowledge (giving rise to smart tourism based on the digital empowerment of stakeholders, services and visitor participation); and promotion of destinations (conveying an image of safety, health control and continuous qualification of resources, from sun and sea to creativity in tourism and human resources). With an extremely intense second wave starting in November 2020, vaccination did not allow groups to be immunised and the evolution of tourism demand and accommodation revenues remained at very low levels. As a result, many SMEs were forced to close.

However, the future is very uncertain, with low expectations in the short and medium term. In Portugal, tourism will have to change, but change was already happening, even before the pandemic. Aviation needs to have other modes of transport able to compete with it (e.g., high speed trains and hyperloop modes of transport), because sustainability is undermined by so much air travel associated with tourism. A new tourism position has been achieved through the valorisation of business travel as “bleisure”/“bizcation”, complementing academic, scientific, professional, or work tasks with an extended stay. Accommodation establishments are finding innovative ways to respond to respond to all tourists’ choices, with valid alternatives. Tourist activities, combining fun, training, education, and development, promote creativity and allow more emotion and emotiveness, more participation, more experience, and better knowledge of the Other. Catering and hospitality are a breeding ground for innovation, diversity, and continuous qualification, specialised human resources, which make people the main asset of tourism in Portugal. It is therefore necessary, to always have the territory as a tourist resource par excellence.

It is important to value health and safety, directly under the influence of the COVID-19 pandemic, of course, but also because of the pressing need for tourist environments. Safety involves not only health, but also climate, terrorism, accessibility. One way to promote this safety and health/sanitation care must involve smart processes. Smart tourism, related to assistive technology and augmented reality (artificial intelligence, virtual reality, speech recognition and standardised responses), needs to be present in all tourism environments to provide quality, service, satisfaction, thereby exceeding expectations, improving accessibility, and promoting heritage and culture.

One proof offered by the pandemic was the importance of less frequent use of overtourism spaces. Getting away from crowds is paramount, giving preference to small groups of visitors and places that are outside the tourist hotspots.

But other changes are needed, due to the influence of COVID-19. It is worth mentioning the increased demand for natural destinations - tourism, outdoor leisure activities, valuing land, air, and water. Rural Portugal destinations are popular, with the greater spatiotemporal distribution of visits, with the maximisation of micro-trips, extended short breaks, city-breaks, shared holidays, the closest ones being also good (valuing staycations). Therefore, it is normal that more attention is given to *peri-urban* leisure, allowing escape from routine, but in spaces of significant proximity. The valorisation of good relations between the visitor and the resident populations, today assumed by experienced and creative tourism, is an argument of the attractiveness of destinations with growing significance. In fact, all processes involving personalised attention, associated with cultural, creative and/or natural tourism of proximity and sharing have gained importance with the COVID-19 pandemic.

CRedit authorship contribution statement

Norberto Santos: Conceptualization, Methodology, Data curation, Supervision, Writing – original draft, Writing – review & editing.
Claudete Oliveira Moreira: Methodology, Software, Formal analysis, Visualization, Writing – review & editing.

Declaration of Competing Interest

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

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