

UNIVERSIDADE DE LISBOA  
Instituto de Geografia e Ordenamento do Território



**Crisis management framework for tourist destinations during health-related  
crises: A case study of Lisbon in the context of COVID-19**

Mariana de Oliveira Castanhas Casal Ribeiro

Orientadores: Prof.a Doutora Inês Sousa e Silva Boavida Portugal

Prof.a Doutora Ana Rita de Deus Rocha Alves Peres da Costa

Tese especialmente elaborada para a obtenção do grau de doutor no ramo de Turismo.

2025



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## **DECLARAÇÃO DE AUTORIA ORIGINAL**

Eu, Mariana de Oliveira Castanhas Casal Ribeiro, declaro que a tese de doutoramento intitulada “Crisis management framework for tourist destinations during health-related crises: A case-study of Lisbon in the context of COVID-19”, é o resultado da minha investigação pessoal e independente. O conteúdo é original e todas as fontes consultadas estão devidamente mencionadas na bibliografia ou outras listagens de fontes documentais, tal como todas as citações diretas ou indiretas têm devida indicação ao longo do trabalho segundo as normas académicas.



# Resumo

A presente investigação doutoral teve como objetivo principal o desenvolvimento de um modelo conceptual de gestão de crises em destinos turísticos, especificamente orientado para contextos de crises de saúde pública. A pandemia da COVID-19 expôs a vulnerabilidade sistémica da indústria turística perante emergências sanitárias de grande escala, revelando falhas estruturais nos mecanismos de preparação, resposta e recuperação. Neste enquadramento, tornou-se imperativo desenvolver modelos de gestão de crise mais adaptados e sensíveis às especificidades de riscos epidemiológicos. Desta forma, a presente investigação visa colmatar essa lacuna, apresentando um modelo teórico e operacional que responda às necessidades emergentes dos destinos turísticos contemporâneos. Com o intuito de alcançar esta meta, a investigação foi orientada para o estudo de caso do destino turístico da cidade de Lisboa, resultando no desenvolvimento de um conjunto de objetivos específicos: avaliar o nível de preparação pré-pandemia dos *stakeholders* turísticos locais; analisar em profundidade os impactos disruptivos da COVID-19 sobre o destino turístico; examinar as respostas institucionais e operacionais adotadas durante a fase de emergência; e investigar as estratégias adaptativas desenvolvidas na recuperação de longo prazo. Em paralelo, foi pretendido analisar a atuação do organismo nacional de turismo, Turismo de Portugal, no domínio da comunicação de crise, com especial enfoque nas estratégias utilizadas para preservar a imagem do destino e assegurar a confiança dos visitantes nacionais e internacionais. A investigação teve ainda como objetivo específico identificar as aprendizagens organizacionais resultantes da experiência pandémica, com vista a reforçar a resiliência do destino turístico perante futuras ameaças sanitárias.

Do ponto de vista metodológico, esta investigação adotou um desenho de estudo de caso longitudinal, com uma abordagem mista que integrou técnicas qualitativas e quantitativas. Esta opção metodológica permitiu um estudo aprofundado, contextualizado e evolutivo da crise, articulando a riqueza interpretativa das perceções dos *stakeholders* turísticos com dados empíricos quantitativos. A vertente qualitativa foi estruturada em torno de duas rondas de entrevistas semiestruturadas realizadas a 9 *stakeholders* turísticos institucionais. Os participantes representavam os principais segmentos da indústria

turística, incluindo o Turismo de Portugal, entidades regionais de turismo, associações empresariais de diversos setores e responsáveis pelas principais atrações turísticas do destino. A recolha de dados qualitativos foi realizada em duas fases distintas: a primeira, entre o final de 2021 e meados de 2022, com o objetivo de captar as dinâmicas iniciais de retoma; e a segunda entre 2023 e o início de 2024, com foco na análise da evolução da pandemia e nos processos de adaptação a longo prazo. Adicionalmente, foi realizada uma análise de conteúdo à comunicação institucional do Turismo de Portugal na rede social Facebook ao longo do período pandémico. A componente quantitativa baseou-se na aplicação de inquéritos por questionário a duas amostras distintas de operadores turísticos: 21 gestores de unidades hoteleiras e 98 proprietários de alojamento local. A utilização destes instrumentos teve como objetivo medir o nível de preparação pré-pandemia, avaliar as respostas operacionais durante a fase de emergência e identificar as medidas de recuperação implementadas nos períodos subsequentes. Os dados foram analisados com recurso a análise estatística descritiva e inferencial, com o intuito de identificar tendências e relações entre as variáveis relevantes, nomeadamente em termos de capacidade de resposta, perdas económicas, e perceções sobre o apoio institucional. Além da investigação empírica, foi realizada uma revisão sistemática e uma meta-análise da literatura científica sobre modelos de gestão de crises aplicados ao turismo e à hotelaria, abrangendo 36 artigos publicados entre 2000 e 2022. Esta análise permitiu identificar 14 modelos distintos, entre os quais se destacam os modelos de Faulkner (2001) e Ritchie (2004), que se encontram amplamente reconhecidos como referências estruturantes no campo. No entanto, os resultados da meta-análise revelaram lacunas significativas na aplicabilidade destes modelos a crises sanitárias contemporâneas, devido ao seu carácter generalista, estrutura linear e foco em eventos de curta duração, como desastres naturais. Verificou-se ainda uma escassa integração de perspetivas de saúde pública, uma limitada atenção à comunicação de crise digital em tempo real e uma fraca incorporação de mecanismos de aprendizagem organizacional. Os dados empíricos demonstraram que o destino turístico da cidade de Lisboa apresentava níveis reduzidos de preparação específica para crises sanitárias antes do surgimento da pandemia do COVID-19. Embora alguns *stakeholders* turísticos dispusessem de planos de contingência genéricos, estes não incluíam protocolos específicos para lidar com surtos epidemiológicos. A maioria das unidades hoteleiras e unidades de alojamento local não dispunha de qualquer plano de gestão de crise antes da pandemia. A resposta inicial foi, por conseguinte, fortemente reativa, marcada por encerramentos temporários,

dificuldades financeiras, perda de receitas e escassez de orientações. Não obstante, a crise impulsionou importantes processos de transformação, designadamente ao nível da reestruturação de operações, implementação de procedimentos sanitários, digitalização de serviços e valorização da sustentabilidade como princípio orientador na retoma da atividade. No âmbito da comunicação institucional, a análise das estratégias adotadas pelo Turismo de Portugal demonstrou a aplicação eficaz das diretrizes da *Situational Crisis Communication Theory* (SCCT), que orienta as estratégias de comunicação de crise de acordo com o grau de responsabilidade percebido pelo público. O Turismo de Portugal adotou predominantemente estratégias de resposta secundária, conseguindo preservar a imagem do destino e manter elevados níveis de *engagement* nas redes sociais. A transição discursiva da comunicação — desde mensagens centradas na empatia e na resiliência, como em *#CantSkipHope*, até aos apelos à redescoberta do destino nacional com *#TuPodes* e à reabertura segura com *#CantSkipOpening* — exemplifica a adaptação comunicacional à evolução do ciclo pandémico e expectativas dos públicos-alvo. Na fase de recuperação a longo prazo, observou-se uma evolução para estratégias de recuperação mais estruturadas, assentes na institucionalização da sustentabilidade como pilar estratégico para o futuro pós-pandémico. As aprendizagens organizacionais emergentes da crise foram igualmente significativas. A pandemia resultou num maior reconhecimento da importância de articulação entre a indústria turística e as autoridades de saúde pública, da cooperação inter-organizacional e da urgência em estabelecer sistemas de planeamento de crise que integrem componentes de vigilância epidemiológica, comunicação em tempo real e mecanismos de flexibilização e adaptação contínua.

Com base na articulação entre os dados teóricos e empíricos, foi desenvolvido um novo modelo conceptual de gestão de crises em destinos turísticos afetados por crises sanitárias. O modelo proposto é composto por cinco fases integradas e sequenciais: (1) fase de prevenção, (2) fase prodrómica, (3) fase de emergência, (4) fase de recuperação a longo prazo e (5) fase de resolução e aprendizagem. A inovação mais significativa deste modelo reside na introdução de mecanismos internos de flexibilização que permitem o ajustamento dinâmico e contínuo das ações em cada fase, em função da evolução epidemiológica da crise. A arquitetura não linear proporciona uma maior agilidade, reduzindo a rigidez dos modelos tradicionais e facilitando respostas ajustadas ao contexto. O modelo integra, também, uma lente de saúde pública, assegurando a articulação entre turismo, epidemiologia e segurança sanitária. Adicionalmente, o modelo contempla a

identificação e envolvimento dos *stakeholders* relevantes, tanto turísticos (autoridades turísticas, entidades de turismo regionais, operadores e empresas privadas) como não turísticos (autoridades de saúde, proteção civil, comunicação social), definindo o seu papel em cada fase do modelo. Em suma, este modelo oferece uma contribuição teórica e prática inovadora para o campo da gestão de crises em turismo. A abordagem integrada, flexível e centrada na saúde pública permite orientar a ação estratégica dos destinos turísticos perante futuras crises sanitárias, promovendo uma recuperação mais coordenada e resiliente. Ao aliar uma evidência empírica robusta a uma revisão crítica da literatura, esta investigação reforça a relevância de uma abordagem sistémica, colaborativa e orientada pela aprendizagem contínua como fundamento essencial para enfrentar os desafios que se colocam ao turismo em contextos de crise de saúde pública.

**Palavras-chave:** gestão de crise; crise de saúde pública; destino turístico; COVID-19; modelo.

# Abstract

This doctoral research developed a conceptual framework for crisis management in tourism destinations, with a specific focus on health-related crises. The COVID-19 pandemic exposed the tourism industry's vulnerability to health emergencies, revealing critical gaps in preparedness, response, and recovery. To address these challenges, the research presents a framework tailored to the evolving needs of contemporary tourism destinations.

Using Lisbon as a case study, the research aimed to: assess stakeholder preparedness prior to COVID-19; analyse the pandemic's impacts on the destination; examine emergency responses; and explore long-term recovery strategies. It also analysed Visit Portugal's crisis communication strategy and its role in safeguarding destination's image. Lessons learned from the crisis were identified to strengthen resilience to future health threats.

A mixed-methods, longitudinal case study design was employed. Qualitative data were collected through two rounds of semi-interviews with 9 key tourism stakeholders, alongside content analysis of Visit Portugal's Facebook communication. Quantitative data were gathered via surveys administered to 21 hotel managers and 98 short-term rental operators, assessing preparedness, response, and recovery measures.

A systematic review and meta-analysis of 36 academic articles identified 14 crisis management frameworks, revealing limitations in addressing prolonged health crises. Existing frameworks lacked integration with public health, real-time communication, and learning mechanisms.

Findings revealed Lisbon's limited preparedness and an initially reactive response. Nonetheless, the crisis triggered significant transformations - digitalization, operational restructuring, health protocol implementation, and increased focus on sustainability. Visit Portugal's strategic communication effectively followed SCCT principles. Organizational learning emphasized the need for greater collaboration between tourism and health sectors. The study proposes a five-phase, non-linear framework: prevention, prodromal, emergency, long-term recovery, and resolution and learning. It introduces flexibility mechanisms, integrates public health perspectives, and defines stakeholder roles - offering a practical and theoretical tool for future health-related crisis resilience.

**Keywords:** crisis management; health-related crisis; tourism destination; COVID-19; framework.

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# ABBREVIATIONS AND ACRONYMS

ACD – Arrendamento de Curta Direção

DGS – Direção-Geral da Saúde

DMO – Destination Marketing Organization

N/A – Not Applicable

NTB – National Tourism Board

RNAL – Registo Nacional de Alojamento Local

SARS – Severe Acute Respiratory Syndrome

SCCT – Situational Crisis Communication Theory

SEF – National Foreigners and Borders Service

SO – Specific Objective

UNESCO – United Nations Educational, Scientific and Cultural Organization

UNWTO – United Nations World Tourism Organization

WHO – World Health Organization

WTA – World Travel Awards



# Chapter 1 – Introduction

## 1.1. Theoretical and methodological background

The tourism industry, being inherently susceptible to external shocks, has become progressively more exposed to uncertainty and instability in recent years (Nair & Dileep, 2020). This escalating vulnerability underscores the critical importance of understanding and managing disruptive events. The genesis of crisis management research can be traced back to the 1960s, with significant contributions arising from the fields of psychology, sociology and disaster response (Jacques, 2009). A crisis is broadly defined as “an unpredictable event that threatens important expectancies of stakeholders related to health, safety, environmental, and economic issues, which can seriously impact an organization’s performance and generate negative comments” (Coombs, 2019, p. 3). Crises are inherently unstable and potentially catastrophic, often unfolding in non-linear and chaotic ways (Faulkner, 2001; Fink, 1986; Longman, 2009; Pennington-Gray, 2018). Their impacts on tourism vary in scale and complexity depending on their nature, magnitude, and scale (Backer & Ritchie, 2017).

Expanding on this foundational understanding, the concept of crisis has been dynamically applied across a multitude of domains, notably within the tourism literature, encompassing diverse events such as natural disasters (e.g. earthquakes, floods, wildfires), terrorist attacks, economic crises, events involving technical mistakes, political instability, acts of terrorism, and disease outbreaks (Berkbekova et al., 2021; Faulkner, 2001). Various emerging and reemerging pathogens have triggered significant health-related crises impacting the tourism industry in the past twenty five years, including the severe acute respiratory syndrome (SARS) (2002–2004), influenza A (2009–2010), avian influenza (2013–2017), Ebola (2014–2016), Zika (2015-2016) (Gao, 2018; Hu et al., 2021), COVID-19 (2019-2023), and the monkeypox (2022- 2023) (Alshahrani et al., 2022). Public health emergencies often produce slow and uneven recoveries (Lai & Wong, 2020). These health-related crises are also frequently compounded by the intense and widespread dissemination of negative media coverage, which has been shown to engender heightened public anxiety and to impede crisis

management efforts by accelerating the propagation of often conflicting information and by exacerbating reputational risks (Wut et al., 2021).

The COVID-19 pandemic, declared by the WHO in March 2020, represents the most impactful global health crisis to date. It led to a 74% drop in international tourist arrivals and over USD 1 trillion in export revenue losses (UNWTO, 2020). In an effort to contain the virus, governments around the world adopted stringent public health measures, including border closures, mandatory quarantines, and nationwide lockdowns (Fauci et al., 2020; Gössling et al., 2020). Considering the increasing frequency and potential severity of health-related crises (Pforr & Hosie, 2020), these events underscore the pivotal role of effective crisis management for tourism destinations, as well as for organizations operating within the tourism industry.

Crisis management is defined as a structured and strategic process through which organisations seek to anticipate, prepare for, and respond to disruptive events that may threaten their operations, reputation, or long-term viability (Pearson & Clair, 1998; Ulmer et al., 2017). Its primary aim is to reduce risks or prevent the adverse consequences that such events may have on organisational objectives (Gonzalez-Herrero & Smith, 2010). This process involves multiple interrelated phases, including the identification of risk, the planning of contingencies, and the implementation of response strategies. These are designed to safeguard the organisation's continuity and resilience during turbulent periods (Ponis & Koronis, 2012). Acknowledging the critical significance of crisis management for the tourism industry, a number of crisis management frameworks have been developed in the literature to provide valuable guidance (Pennington-Gray, 2014). However, despite the conceptual lifecycle-based approach to crisis management, scholarly attention in tourism studies has been concentrated on the response and recovery stages. In comparison, limited research has focused on the earlier phases of prevention and preparedness, which are crucial for building long-term resilience in tourism (Ritchie & Jiang, 2019).

The field of crisis management has undergone rapid and continuous transformation, shaped by an increasingly complex, interconnected, and volatile global landscape. Digital communication technologies have been identified as a significant catalyst of change. Social media and real-time digital platforms have revolutionized crisis communication, enabling the instantaneous dissemination of information – both factual and misleading – while facilitating immediate, bidirectional engagement with the public (Austin et al., 2012; Schultz et al., 2022; Veil et al., 2011). This paradigm shift has not only redefined

the speed and scale of crisis communication but has also significantly raised the stakes, compelling organisations to adopt more agile and strategic approaches to message control, audience engagement, and misinformation management (Wut et al., 2021). In this era of pervasive digital scrutiny, public expectations for accountability have intensified, and any delay or misstep in crisis communication can rapidly erode public trust, damage the organisation's reputation, and trigger serious financial repercussions (Coombs & Holladay, 2018; L'Etang & Pike, 2021). In this regard, the Situational Crisis Communication Theory (SCCT) offers a valuable theoretical lens for aligning communication strategies with stakeholder perceptions of responsibility (Coombs, 2007). In the context of public health emergencies, which are frequently categorised as low-responsibility crises, the SCCT offers guidance on safeguarding organisational reputation and restoring trust through the tailored message strategies, especially in the face of digital visibility and scrutiny (Coombs & Tachkova, 2023).

Concurrently, the discourse on crisis management research has expanded to place greater emphasis on resilience. Resilience is understood as the dynamic capacity of systems to not only withstand shocks, but to adapt, reorganise, and recover in the face of adversity. This shift denotes a transition from defensive approaches that prioritise the avoidance of failure, to a more proactive and adaptive mindset that is oriented towards thriving in complex and uncertain environments (Jiang et al., 2021; Lengnick-Hall et al., 2011).

Despite the growing body of knowledge, the existing literature on tourism crisis management continues to exhibit several notable limitations that impede a comprehensive understanding and effective response to crises. Tourism crisis management research often lacks robust theoretical foundations, particularly within the realm of destination crisis management. Much of the field is dominated by descriptive, event-specific studies with limited generalizability (Pennington-Gray, 2018). Conventional frameworks present crisis management as linear, phase-based sequence, which fails to capture the nature of real-world crises (Ritchie & Jiang, 2019; Pennington-Gray, 2018; Speakman & Sharpley, 2012). There is a clear need for more dynamic, integrated frameworks. Theories like Chaos Theory may provide important perspectives on the volatile and intricate dynamics of crises (Zamoum & Gorpe, 2018), supporting the development of more flexible and robust crisis management strategies within tourism organisations. Nevertheless, the integration of such theoretical perspectives into tourism crisis management remains underexplored, particularly concerning health-induced disruptions (Choi & Hyun, 2024).

Furthermore, tourism crisis research would benefit from greater interdisciplinarity (Pennington-Gray, 2018). This need becomes particularly salient in the context of health-related crises, where urban destinations face the added complexity of managing public health risks in densely populated settings while simultaneously striving to maintain their attractiveness as major tourist hubs (Ioannides & Gyimóthy, 2020). In such cases, it is especially crucial that tourism crisis management research adopts an interdisciplinary perspective, incorporating insights from epidemiology, media studies, and emergency management. These disciplines are essential for the formulation of comprehensive, context-sensitive strategies that can effectively respond to the unique challenges posed by health emergencies in tourism destinations (Pennington-Gray, 2018).

Lastly, there is a pronounced need for more longitudinal research (Pennington-Gray, 2018). The majority of crisis studies in tourism focus on single-event cases and short-term outcomes, offering little insight into how destinations build resilience or institutional learning over time (Hall et al., 2020; Scott et al., 2008). The distinct advantage of adopting a longitudinal approach lies in its inherent capacity to provide a temporal dimension to data collection, allowing researchers to accurately track the ripple effects and sustained impacts of unexpected events (Gerike & Gosselin, 2014). This temporal tracking is not merely beneficial but essential for critically evaluating the long-term effectiveness of crisis management strategies and understanding how tourism destinations, organisations, or businesses adapt and perform over time.

In view of the significant research lacunae and the acknowledged value of more robust theoretical foundations, the overarching purpose of the present doctoral research is to develop a conceptual crisis management framework specifically tailored for tourism destinations facing health-related crises. The proposal of a conceptual framework specifically for health-related crises aims to advance understanding of how such crises differ in dynamics, duration, and management challenges, thereby fostering the creation of more targeted and theoretically informed frameworks (Pennington-Gray, 2018). The objective is to be accomplished by conducting a longitudinal study (2020-2024) of the management of the COVID-19 pandemic in the tourism industry of Lisbon. The selection of Lisbon as a case study is particularly pertinent due to its high degree of international tourism dependency, its rapid growth trajectory in recent years, and the inherent complexities of managing a diverse urban tourism ecosystem. This established pre-crisis dynamism provides a critical baseline against which to assess the subsequent impacts of the pandemic, the efficacy of implemented response strategies, and the pathways to

recovery and enhanced resilience. Analysing Lisbon's experience offers invaluable empirical insights into how a major, internationally oriented urban destination navigates a large-scale, low-responsibility crisis, contributing significantly to the broader understanding of destination crisis management frameworks in the context of public health emergencies.

## **1.2. Study Area**

Lisbon, the capital of Portugal, stands as a pivotal European urban tourism destination, celebrated for its profound historical narrative, pulsating culture, and captivating scenic landscapes. Located on the western flank of the Iberian Peninsula, along the Tagus River and facing the Atlantic Ocean, this city functions as a major international gateway. It encompasses a rich array of cultural and historical landmarks, including UNESCO world heritage sites such as the Jerónimos Monastery and the Tower of Belém, which powerfully narrate Portugal's enduring maritime history. Beyond its historical grandeur, Lisbon's iconic neighbourhoods - such as Alfama, Bairro Alto, and Chiado - offer a blend of tradition charm and modern allure, attracting a diverse clientele seeking unique experiences.

Tourism is a cornerstone of Lisbon's regional economy, contributing significantly to the national gross domestic product and serving as a key driver of employment and wealth generation (Bunghetz, 2016). In 2019, the region welcomed a record of 5.9 million international visitors, collectively generating approximately 14.7 million overnight stays (TravelBI, 2024a). The COVID-19 pandemic severely disrupted this growth trajectory. In 2020, international visitor arrivals plummeted to approximately 1.3 million international visitors, resulting in a substantial reduction to around 3.3 million overnight stays (TravelBI, 2024b). Although a marginal recovery was witnessed in 2021, with international arrivals reaching roughly 1.9 million and overnights increasing to 5.0 million, the industry remained significantly below pre-pandemic performance levels (TravelBI, 2023a). The resurgence of the tourism industry began in 2022, as international visitor numbers rebounded strongly to approximately 5.4 million, generating about 13.9 million overnights (TravelBI, 2023b). This demonstrating a substantial return of confidence. By 2023, Lisbon's tourism industry evidenced a complete recovery, with international visitor figures reaching approximately 6.4 million and overnight stays nearing 16.0 million, thus surpassing the levels recorded in 2019 (TravelBI, 2024c). This

sustained recovery trajectory continued into 2024, with Lisbon recording 6.5 million international visitors and 15.9 million overnight stays (TravelBI, 2025). This represented a 4.1% increase compared to the previous year. Alongside the rebound of tourism, Lisbon has garnered growing prestigious recognitions as a tourism hub. The city of Lisbon has been consistently documented as a prominent destination in international tourism rankings. In 2024, the city was awarded the titles of “Europe’s Leading City Destination” and “World’s Leading City Break Destination” at the 31st edition of the World Travel Awards (WTA). Furthermore, Lisbon was also awarded the title of “World’s Leading Heritage City Destination” for the first time in 2024 at the WTA. These accolades serve to reinforce Lisbon's reputation as a premier global urban tourism destination.

### **1.2.1. Epidemiological timeline and governmental containment to COVID-19**

Portugal’s epidemiological trajectory during the COVID-19 pandemic was consistent with global patterns of succeeding waves yet was influenced by governmental containment strategies and societal adherence. The country faced five waves of the virus. The Direção-Geral da Saúde (DGS) functioned as the chief authority for the monitoring and dissemination of public health data, guiding the nation's response.

The first COVID-19 cases in Portugal were confirmed on March 2, 2020 (Expresso, 2020). Less than three weeks later, Portugal declared the first state of emergency on March 19, 2020 (Decree of the President of the Republic No. 14-A/2020, 2020). This period was characterised by stringent, nationwide lockdown measures, including mandatory lockdowns, the closure of non-essential services, schools, restaurants and businesses, the suspension of international flights, and strict limitations on social gatherings. These actions effectively curbed the propagation of the first wave, leading to a notable decline in daily cases from a peak of approximately 1,127 new cases on March 30 to significantly lower figures by late spring (DGS, 2025). On May 2, 2020, Portugal transitioned to a state of calamity (Decree-Law No. 20/2020, 2020), a process which was accompanied by an easing of restrictions and gradual return to certain routines. The containment measures were relaxed in most regions across the country, except in Lisbon, when infection rates rose (OECD & European Observatory on Health Systems and Policies, 2021). This resulted in a resurgence of the pandemic, which had a significant impact on the economic recovery and tourism industry during the summer months (Ferreira-da-Silva et al., 2022). In the period following the summer months, Portugal

experienced a significant second wave of the virus in autumn of 2020. The second wave, which began in October 2020, led to the declaration of a state of calamity on October 15 (Decree-Law No. 87-A/2020, 2020) and a state of emergency on November 9 (Decree of the President of the Republic No. 51-U/2020, 2020), introducing inter-municipal travel bans, capacity limits, mandatory face coverings, and fines for non-compliance. Following some equivocal public messages from the government during the Christmas holidays, a third wave of the virus hit Portugal in January-February 2021 (amidst the Alpha variant). This period witnessed a significant increase in infections, with daily new cases reaching peaks of over 10,000 in January 2021 (DGS, 2025), and a corresponding rise in hospitalisations and intensive care unit admissions, placing considerable pressure on the national health service (OECD & European Observatory on Health Systems and Policies, 2021). In response, the government implemented tighter restrictions, including a second full lockdown, curfews and inter-municipal travel bans to curb the second wave of the pandemic. The subsequent fourth wave (June to September 2021), marked by the Alpha and Delta variants and the fifth pandemic wave (November 2021 to March 2022), Omicron-dominant, coincided with the progressive rollout of Portugal's highly effective national vaccination campaign. By September 2021, 85 % of the Portuguese population were fully vaccinated, making Portugal the first country in the world to reach this milestone (Mathieu et al., 2021). This enabled a gradual easing of most containment protocols, transitioning from curfews, mandatory mask-wearing and capacity limits to a more endemic-oriented management strategy by the end of 2022.

### **1.3. Primary and specific objectives**

The primary objective of this doctoral research is to develop a conceptual crisis management framework specifically tailored for tourism destinations facing health-related crises. This objective is to be accomplished by conducting a study of the management of the COVID-19 pandemic in the tourism industry of Lisbon. To achieve this overarching aim, this thesis is guided by the following specific objectives (SO) to:

SO1 - Provide a foundational understanding of the COVID-19 pandemic's initial disruption to the tourism industry and its implications for crisis management.

SO2 - Review and critically analyse existing crisis management frameworks within the tourism and hospitality literature.

SO3 - Assess the pre-pandemic level of preparedness of Lisbon for public health emergencies.

SO4 - Analyse the digital crisis communication strategies employed by the national tourism board (NTB), Visit Portugal, during the COVID-19 pandemic to safeguard the destination's image and ensuring visitor safety.

SO5 - Examine the immediate impacts of the Covid-19 pandemic and the response measures implemented by Lisbon's tourism stakeholders during the emergency phase of the COVID-19 pandemic.

SO6 – Explore the strategic and adaptive measures adopted by tourism stakeholders in Lisbon during the long-term recovery phase of the COVID-19 pandemic.

SO7 - Ascertain the transformative lessons learned from the COVID-19 pandemic by the Lisbon tourism stakeholders for enhanced destination resilience against future public health crises.

SO8 - Synthesize theoretical insights from existing scientific literature (SO 1-2) and empirical findings from the Lisbon case study (SO 3-7) to develop a conceptual crisis management framework explicitly designed for tourism destinations facing health-related crises.

#### **1.4. Thesis Structure**

The present thesis adopts a “by publication” structure, in accordance with the article 41 of the Regulation of Postgraduate Studies of the Institute of Geography and Spatial Planning of the University of Lisbon, Order no. 711/2023, published in *Diário da República - Series II no.10* - on 13 January 2023. It has been developed in accordance with the structure of scientific research articles and book chapters published in different peer reviewed journals indexed in the *Scopus* or *Web of Science* databases. Each publication contributes to the achievement of one or more of the defined specific objectives.

Chapter 2 comprises the research article “Reflection on COVID-19 Pandemic and Crisis Management in Tourism”. This chapter serves to contextualize the unprecedented scale and scope of the pandemic's impact, laying the groundwork for subsequent analytical components of the doctoral research. In doing so, it directly contributes to the achievement of SO1. Chapter 3 comprises the research article “Review of Crisis Management Frameworks in Tourism and Hospitality: A Meta-Analysis Approach”. This

chapter aims to identify the robustness of existing crisis management frameworks, identifying their theoretical applicability and limitations in responding to large-scale health-related crises such as COVID-19. In doing so, it directly contributes to the achievement of SO2. Chapter 4 comprises the research article “DMOs and Social Media Crisis Communication in Low-Responsibility Crisis: #Visit Portugal Response Strategies during COVID-19”. This chapter delves into a crucial aspect of destination management during a crisis, exploring the role of digital crisis communication in reputation and visitor safety. In doing so, it directly contributes to the achievement of SO4. Chapter 5 comprises the book chapter “Recuperação pós-COVID e adoção de práticas mais sustentáveis na atividade turística em Portugal”. This chapter explores the immediate impacts of the pandemic and the long-term recovery phase of the tourism industry at a national level in Portugal, with a particular focus on the strategic measures promoted by the national tourism board to rebuild and transform the industry following the COVID-19 crisis, setting the broader context for the subsequent analysis of Lisbon-specific stakeholder responses. In doing so, it directly contributes to the achievement of SO5, SO6 and SO7. Chapter 6 comprises the policy brief “COVID-19 e o arrendamento de curta duração: efeitos da pandemia na cidade de Lisboa” and the research article “Prescribing a crisis management framework for health-related crises in tourism destinations: lessons from Lisbon during COVID-19”. This chapter comprehensively addresses the destination's preparedness, emergency response, long-term recovery, and pivotal stakeholder learning. Integrating these insights, it proposes a novel conceptual crisis management framework tailored for tourism destinations confronting public health emergencies. In doing so, it directly contributes to the achievement of SO3, SO5, SO6, SO7 and SO8.

In addition to these chapters, this doctoral thesis comprises an introduction and conclusion chapters. For the thesis' purpose, the included articles, book chapter, and policy brief have been formatted to ensure consistency and harmony in reading. The respective DOIs are provided with active hyperlinks directing the reader to their original published versions, allowing direct access for consultation if desired. Table 1 briefly describes the thesis structure, relating the published outputs to the research objective.

**Table 1.** Research structure scheme.

<b>Chapter</b>	<b>Title</b>	<b>Publication Type</b>	<b>Publication Name</b>	<b>Goal</b>	<b>Specific Objective</b>
1	Introduction	N/A	N/A	Theoretical and methodological structure, description of the study area, presentation of objectives	N/A
2	The COVID-19 pandemic and crisis management	Review Article (published)	Reflection on COVID-19 Pandemic and Crisis Management in Tourism	Reflect on the impacts of the pandemic, laying the groundwork for crisis management research in tourism	SO1
3	Crisis management frameworks in tourism and hospitality literature	Review Article (published)	Review of Crisis Management Frameworks in Tourism and Hospitality: A Meta-Analysis Approach	Comparative analysis of existing crisis management frameworks in the literature	SO2
4	Unveiling Visit Portugal crisis communication during COVID-19	Research Article (published)	DMOs and Social Media Crisis Communication in Low-Responsibility Crisis: #Visit Portugal Response Strategies during COVID-19	Analyse the digital crisis communication employed by Visit Portugal during the COVID-19 pandemic concerning destination image and visitor safety	SO4
5	National-level strategic recovery: context for Lisbon's long-term tourism recovery	Book Chapter (published)	Recuperação pós-COVID e adoção de práticas mais sustentáveis na atividade turística em Portugal	Analyse the national long-term recovery strategies in Portuguese tourism, providing context for the Lisbon destination-level recovery strategies	SO5 / SO6 / SO7
6	Lessons from Lisbon: crisis management during COVID-19	Policy Brief (published) Research Article (submitted)	COVID-19 e o arrendamento de curta duração: efeitos da pandemia na cidade de Lisboa Prescribing a crisis management framework for health-related crises in tourism destinations: lessons from Lisbon during COVID-19	Synthesize empirical findings from Lisbon's tourism stakeholders across the full cycle of crisis management, proposing a conceptual framework tailored for health-related crises in tourism destinations	SO3 / SO5 / SO6 / SO7 / SO8
7	Conclusion	N/A	N/A	Main findings, discussion, limitations and further research	N/A

# Chapter 2 –The COVID-19 pandemic and crisis management

This chapter offers a foundational reflection on the unprecedented disruption caused by the COVID-19 pandemic to the global tourism industry, highlighting its immediate impacts and broader implications for crisis management. By contextualizing the scale and complexity of the crisis, the chapter lays the groundwork for the subsequent analytical components of this doctoral research.

## 2.1. Publication I - Reflection on COVID-19 Pandemic and Crisis Management in Tourism

*The material presented in this section has been published in a peer-review journal, Barataria. Revista Castellano-Manchega de Ciencias Sociales:*

Casal Ribeiro, M. O. C. (2021). Reflection on COVID-19 pandemic and crisis management in tourism. *Barataria. Revista Castellano-Manchega de Ciencias Sociales*, 30, 143-153. DOI: <https://doi.org/10.20932/barataria.v0i30.606>

### REFLECTION ON COVID-19 PANDEMIC AND CRISIS MANAGEMENT IN TOURISM

### REFLEXIÓN SOBRE LA PANDEMIA DE COVID-19 Y GESTIÓN DE CRISIS EN EL TURISMO

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ABSTRACT

The contemporary history of tourism has been shaken by different types of crises as natural disasters, economic crises, terrorist attacks and pandemics, resulting in economic, political and social implications that impact the tourist destination, the volume and direction of tourist flows. In early 2020, COVID-19 took the world by surprise, causing a worldwide pandemic in just a few months. The dimension of this outbreak coupled to the mobility that characterizes tourism in the Anthropocene, now raises a need for reflection on the arising and control of future pandemics. Several models of crisis management in tourism are presented in the scientific literature, however, all of generalist nature. It is urgent to examine and refine the existing crisis management models, since the models already developed have little specificity in the theme of pandemic crisis management in tourism.

#### KEYWORDS

COVID-19; Crisis Management; Pandemics; Tourist Destinations

#### CONTENTS

1. Introduction. 2. The context of Crisis and Tourism. 3. Crisis Management Models in Tourism. 4. The Pressure of Anthropogenic Pandemics in Tourism. 5. The COVID-19 and Future Outlines for Crisis Management in Tourism 6. References

#### RESUMEN

La historia contemporánea del turismo ha sido sacudida por diferentes tipos de crisis, como los desastres naturales, las crisis económicas, los ataques terroristas y las pandemias, lo que resulta en implicaciones económicas, políticas y sociales que afectan al destino turístico, al volumen y a la dirección de los flujos turísticos. A principios de 2020, la COVID-19 tomó al mundo por sorpresa, causando una pandemia mundial en solo unos meses. La dimensión de este brote, unido a la movilidad que caracteriza al turismo en el Antropoceno, plantea ahora la necesidad de reflexionar sobre la aparición y el control de futuras pandemias. Varios modelos de gestión de crisis en el turismo se presentan en la literatura científica, sin embargo, todos de carácter generalista. Es urgente analizar y depurar los modelos de gestión de crisis existentes, ya que los modelos ya desarrollados tienen poca especificidad en el tema de la gestión de crisis pandémicas en el turismo.

## PALABRAS CLAVE

COVID-19; Gestión de Crisis; Pandemias; Destinos Turísticos

## SUMARIO

1. Introducción. 2. El Contexto de Crisis en Turismo. 3. Modelos de Gestión de Crisis en el Turismo. 4. La Presión de las Pandemias Antropogénicas en el Turismo. 5. El COVID-19 y Esbozos Futuros para Gestión de Crisis en el Turismo. 6. Bibliografía.

### **1. Introduction**

The social and ecological changes in the Anthropocene are driving the emergence of new pandemics, threatening the global economy and human lives (Zheng et al., 2021). No tourist destination is immune to such future events, placing tourism under constant threat (Pforr & Hosie, 2008; De Sausmarez, 2004). It is important to analyse how pandemics are studied and managed by the tourism literature. In this context, this paper aims to explore the literature on crisis management in tourism with a focal point on the COVID-19 pandemic. Towards a better understanding of the roots of COVID-19, a discussion about the emergence of anthropogenic pandemics and its impacts on tourism is presented. The COVID-19 pandemic is now the trigger point for a critical reflection on existing crisis management models in tourism literature and the development of pandemic management strategies suitable for resilient tourist destinations. It is hoped that this paper will provide a benchmark of current understanding and contribute to the development of future crisis management models more adapted to pandemic crises in tourism.

### **2. The context of crises in tourism**

The term “crisis” is usually applied in different scenarios in tourism as in natural disasters, economic crises or pandemics, resulting in a lack of precision in terms of scientific literature (Laws & Prideaux, 2005). Therefore, the authors tried to broadly define crisis as an event of small or large scale that disturbs the well-organized operation of the tourism industry, threatening their stability. It is important to considerate the probabilistic component and the event’s unknown element, as a crisis it is also a: “low-probability,

high-consequence event that develops very rapidly and involves ambiguous situations with unknown causes and effects (Robert et al., 2007:109)”.

Faulkner (2001) noted that the disturbing event might originate outside the tourist system or represent an extension of the system itself, distinguishing for the first time a crisis from a disaster. Thus, a crisis is then a partially self-inflicted event in the system, resulting from prolonged structural problems, management failures or inadequacy to change as, for example, an economic crisis. The United Nations World Tourism Organization (UNWTO) itself expressed its concern about the unfitting management of crises that affect the tourism industry, creating a set of guidelines for professionals, governments and destinations (UNWTO, 2003). A disaster, on the other hand, results from a shock between the tourist system and rapid and unexpected catastrophic changes, over which it has little or no control as, for example, a pandemic caused by a new virus (Faulkner, 2001). Ritchie (2004) categorized crises and disasters identified in the literature into groups by different criteria: level of uncertainty, scale and geographical dimension, temporal dimension, level of threat, extent and potential impact and the degree of control and response.

In the case of a tourist destination, crises and disasters directly and indirectly impact tourism, both in terms of tourism supply and demand. Financial and economic crises can weaken the income and capacity of tourism demand, while pandemic outbreaks and natural disasters cause direct impacts on tourist destinations and flows (Faulkner, 2001). From a macroeconomic perspective, crisis and disasters cause a decrease in tourist numbers, triggering a fall in private sector profits and, possibly, interruption of new investments in the destination (Laws & Prideaux, 2005). Crises and disasters are not linear (Pennington-Gray, 2018), but chaotic situations between human and non-human systems, as suggested by complexity or chaos theory (Ritchie & Jiang, 2019; Faulkner, 2001). Their impacts on tourism may be complex, depending on their nature, magnitude and scale (Backer & Ritchie, 2017). By consequent, the boundaries between human activity and rise of new crises are becoming more difficult to identify, due to their increasing complexity (Ritchie, 2004). The complexity between systems is easily evident in the case of the foot-and-mouth outbreak in the United Kingdom, which started as an agricultural crisis and, due to the way it was managed, ended up becoming a crisis for the tourism industry across the country (Miller & Ritchie, 2003). In the end, destinations and tourism stakeholders have a short window period to control the event, recover losses and restore order.

### **3. Crisis management models in tourism**

The tourism industry is not well prepared to manage crises and disasters (Wang & Ritchie, 2012). However, a well-structured crisis management is essential to boost the preparedness of destinations to effectively mitigate the impacts and accelerate the destination recovery. As crisis management is contemplated as a process, instead of a one-shot operation (Cioccio & Michael, 2007), a number of crisis management models and frameworks have been researched by tourism literature over the years.

Faulkner (2001) shaped the first model of disaster management exclusively for the tourism industry. Resulting from an analysis of crisis management strategies developed in other disciplines and a comparative study of disasters that occurred, the author created an important model for analysing different tourism disasters and management strategies. Six sequential phases have been identified -pre-event, prodromal, emergency, intermediate, long-term recovery, resolution- with each phase covering key elements for efficient disaster management response and recovery. Faulkner's model has been tested in Bali Bombing terrorist attack and in a flight crash of Singapore Airline (Henderson, 2003a, 2003b). Henderson (2003b) argued that identifying threats for terrorist attacks and the time available to avoid a plane crash are variables somewhat intangible, blended the first three phases of Faulkner's (2001) framework into event phase of crash. In the same year, Faulkner's model was also applied to a health crisis, the outbreak of Food and Mouth disease in the UK (Miller & Ritchie, 2003). It was noticed that in that case the prodromal phase was very short, giving no time to prepare for an imminent crisis. A more recent study divided the long-term recovery stage of Faulkner's model into three sub-stages: (1) infrastructure recovery, (2) individual firms and tourism organizations marketing response and (3) system adaptation (Scott et al., 2008).

Just three years later, Wilks & Moore (2004) framed crisis management into four distinctive phases – reduction, readiness, response and recovery – by presenting the “Four Rs” framework of crisis management. The authors argue that the focal point for a successful crisis management must be an effective preparedness during the first two phases by creating crisis awareness, crisis plans and safety procedures, which will be successfully implemented in the last two phases. Industry associations as Pacific Asia Travel Association have already implemented the “Four Rs” framework to bring forth practical guidelines of how to manage a crisis (Wilks & Moore, 2003). In the same line of thought, De Sausmarez (2004) indorses a crisis management policy grounded on

proactive crisis management during the pre-crisis period over post-crisis response. Therefore, crises may be anticipated by continuum risk assessments, identifying sources of greatest risk, tracking risk indicators and developing crisis plans ready to be implemented. This is also reinforced by a growing literature tying the important role of crisis prevention (Donohoe, Pennington-Gray, & Omodior, 2015; Becken & Hughey, 2013).

Ritchie (2004) designed a crisis management model for both disasters and crises in tourism by analysing these events in a holistic way. Ritchie's model keeps the six sequential phases of Faulkner's model yet adds an element of flexibilization to all six phases, by considering the unique characteristics of each event, such as its typology or its duration. With this encouragement to modify models, researchers have attempted to develop more accurate models from various perspectives.

For Ketter (2016) preventive and inclusive measures must be created in order to be able to safeguard and reinforce the public image of destinations, in the long-term recovery phase. Using the theory of image repair, destinations will thus be able to manage the destination image during crisis and reinforce the image before the crisis.

Stafford et al. (2002) recommended a response-recovery model for malevolence-based crisis as terrorist attacks, while Paraskevas and Arendell (2007) suggested a detailed anti-terrorism model grounded on a strategic crisis management approach (Ritchie, 2004).

Scott et al. (2008) outlined that recovering from a crisis demands only a sequence of curative steps to restore balance, by dividing the long-term recovery phase of Faulkner's model into three sub-phases: (1) infrastructure's recovery, (2) marketing response by companies and tourism stakeholders, and (3) system adaptation.

Pennington-Gray's (2014) developed a framework for studying the impacts of disasters in destination context, while Avraham's (2015) added the effect of sensationalist media for impacting destination images after crises.

Several authors such as Brown et al. (2017) corroborate Ritchie's crisis management model. On the other hand, Speakman & Sharpley (2012) point out limitations to Ritchie's model, by deconstructing the principle that crises follow a sequential life cycle and recommending the use of alternative models, based on complexity and chaos theory, to better analyse crisis events in tourism and, even, pandemic crises. The complexity theory states that the chaos resulting from periods of stability is an intrinsic and potentially beneficial aspect to any tourism system (Kaklauskas et al., 2009). This process is relevant

for helping destinations to reinvent themselves and, therefore, plays an important role in the life cycle development of tourist destinations (McKercher, 1999).

Although disaster and tourism crisis models have been researched, they have had few empirical tests and modifications so far (Ritchie & Jiang, 2019). At this time, no model has been developed or adapted to fit pandemic crises in tourism. In summary, to this day Ritchie's model remains the most studied framework to systematically investigate crisis management processes in tourism (Pforr & Hosie, 2008).

#### **4. The pressure of anthropogenic pandemics in tourism**

Many crises have hit tourism over the past hundreds of years. However, epidemic and pandemic outbreaks are one of the greatest threats of the 21st century to the well-being of societies and tourism (Hall et al., 2020; Scott & Gössling, 2015; Page & Yeoman, 2007). Despite this growing threat and the increasing research on crises in tourism, the academy's focus of study continues to fall on economic crises, rather than studying pandemic and health-related crises (Jiang et al., 2017). Mair et al. (2014) identified that in sixty-four studies carried out between 2000 and 2010, only four analysed health-related crises in tourism.

It must be asked why pandemic outbreaks pose a threat to modern societies and tourism sector in the 21st century? Paul Josef Crutzen & Eugene Stoermer introduced us the notion of Anthropocene, to highlight the global impacts of present-day human activities and to prove that the emergence of new pandemics outbreaks are not natural phenomena, but complex events (David et al., 2021). Anthropocene is well defined in the literature as: “[...] the proposed name for a new geological epoch demarcated as the time when human activities began to have a substantial global effect on the Earth’s systems (Whitmee et al., 2015:1975)”.

In this new era of the Anthropocene, pandemics are today enhanced by the global society in which we live in, resulting from the increase of landscape change, wildlife exploitation (McMichael, 2001) and the increase of world population, urban areas with high concentration of people, the mobility between societies and the augmented and hyper-mobile growth of tourism (Hall, 2010). At the same time, the development of global transport networks, the agricultural intensification (McMichael, 2001) and the changes in food habits with an increase of eating super-foods, exotic foods and processed foods are

proving to be excellent vectors for pathogens transmission (Labonte et al., 2011; Pongsiri et al., 2009). Wu et al. precisely identify areas of high risk for new infectious diseases outbreaks in the Anthropocene as:

“High-risk areas for the emergence and spread of infectious disease are where [...] wild disease reservoirs, agricultural practices that increase contact between wildlife and livestock, and cultural practices that increase contact between humans, wildlife, and live-stock [intersect] (2017:18)”.

Consequently, all outbreaks of SARS (SARS-CoV), Ebola, Zika, Avian influenza and now the most impactful pandemic of COVID-19, are consequences of anthropogenic impacts caused by the human actor on non-human actors as ecosystems and biodiversity (Petersen et al., 2016). As a result, it is verifiable that the incidence rate of major pandemic outbreaks has increased. While the past century was hit by three events - the Spanish flu (H1N1) of 1918, the Asian flu (H2N2) of 1957 and the Hong Kong flu (H3N2) of 1968 - the first twenty years of the 21st century are already marked by five global pandemics – the SARS in 2002, the Avian influenza (H5N1) in 2009, the Middle East Respiratory Syndrome (Mers-CoV) in 2012, the Ebola in 2013 and the COVID-19 (SARS-CoV-2) in 2019 (Gössling et al., 2021; Coker et al., 2011).

At the beginning of this century, SARS was identified as a severe acute respiratory syndrome that began in China, with some similarities to COVID-19 virus and, therefore, deserves our attention. The SARS virus has caused a substantial impact on tourist flows in Asia. About nine thousand people were infected with the virus and eight hundred and seventy died (McKercher & Chon, 2004). After its rise in 2002, the outbreak quickly spread globally through traveling tourists (Mason et al., 2005), reinforcing the characteristic of travel and tourism as first-rate transmission vectors of pandemic outbreaks (Nicolaidis et al., 2019). For the first time in forty-five years, the World Health Organization (WHO) issued a note discouraging tourism in affected regions and recommending closing borders (Smith, 2006; Wall, 2006). Cooper (2005) noted that Japanese tourists automatically stopped traveling to destinations affected by SARS. The most affected countries like Singapore, Vietnam, China and Hong Kong lost close to \$ 20 billion dollars in GDP and three million jobs in the tourism sector (Kuo et al., 2008). Despite a rapid attempt to manage and contain the crisis, the information shared by WHO, labelling the outbreak as a “pandemic”, added to the sensationalism in media coverage,

led to a global panic (Mason et al., 2005; McKercher & Chon, 2004). Pandemic crises are more susceptible to negative coverage by media, inferring an extra challenge for tourist destinations to successfully manage crises (Schroeder & Pennington-Gray, 2014). The global economic cost is estimated to have reached \$ 100 billion dollars, of which \$ 48 billion dollars refer only to China, the destination where the outbreak emerged (McKercher & Chon, 2004).

## **5. The COVID-19 pandemic and future outlines for crisis management**

At the end of 2019, the COVID-19 virus was first identified in Wuhan region, China. It is interesting to note that it is believed that the outbreak erupted most likely in Huanan meat market, a market where species of wild and protected animals are sold as delicacies foods. Markets of this type, where wild animals often result from poaching, abound in China and have given rise to other pandemic in the past, such as SARS in 2002 (O'Callaghan-Gordo & Antó, 2020). Once again, the human actor is somehow culprit of this new pandemic that put society on hold, with an unprecedented impact on the global tourism industry as travel has being considered a high-risk activity (Zheng et al., 2021). COVID-19 is not as contagious as measles or as deadly as SARS, but it has the distinctive characteristic of having a high incubation period, assisting the virus transmission several days before symptoms start to develop (Bai et al., 2020). In addition, the virus has also a high rate of asymptomatic transmission (Li et al., 2020). After its identification in Huanan market, the virus rapidly spread to other places in China and worldwide. On Feb 2020, already 80 countries had enforced travel restrictions, borders closure, visa restrictions and flight suspensions (Kiernan & DeVita, 2020). One month later, the WHO was categorizing COVID-19 as a worldwide pandemic disease (World Health Organization, 2020). On April 2020, UNWTO reported that all main tourist destinations had implemented travel restrictions in an attempt to mitigate the COVID-19 pandemic (UNWTO, 2020), forcing them to stop their operations following lockdown measures, travel bans and cancelled bookings (Fotiadis et al., 2021). Due to COVID-19, global tourism suffered its worst year on record in 2020, with an estimated loss of USD 1.3 trillion revenues in international travel, leaving between 100 and 120 million tourism jobs at risk. This number represents more than 11 times the loss recorded during the 2009 global economic crisis (UNWTO, 2021).

The COVID-19 is already the deadliest pandemic in the Anthropocene (Fotiadis et al., 2021). At the beginning of 2021, first steps were taken towards mass vaccination, but until herd immunity is reached, we live in troubled periods of lockdowns, curfews, social distance measures, restrictions and travel blocks. At the time of writing, COVID-19 already counted more than 147 million infections and exceeded 3 million deaths worldwide (ECDE, 2021). We have now reached a point where we must reflect. The COVID-19 pandemic may be baptized as an ‘Anthropocene disease,’ underlining this new ecological era in where the human actor and his activities are pressuring the ecosystems, with painful consequences on environment, society and public health (David et al., 2021). It is important to be aware that new and more severe pandemics may arise in the near future and that the rate of new infectious diseases is likely to increase in the Anthropocene, as interaction with non-human animals, climate change and pressure on ecosystems accelerates (Stephen, 2020).

So, what can be done to prepare and secure tourist destinations hit by future pandemics? The COVID-19 pandemic embodies the ideal scenario for this analysis considering the level of complexity and multi-typology of the pandemic. The features of COVID-19 have made it be classified as a combination of natural disaster, a socio-political crisis, an economic crisis and a tourism demand crisis (Zenker & Kock, 2020). To deal with this high complexity and interconnectedness, future crisis management adapted to pandemics must be able to incorporate the level of complexity of each pandemic and the destination resilience towards each outbreak. It should also be accounted the crisis typology, in order to differentiate its impacts and develop specific crisis management strategies for pandemics (Zeng, Carter & De Lacy, 2005; Miller & Ritchie, 2003). Alike COVID-19, future pandemics may request the development of preventive and control strategies to protect human health such as social distancing measures, lockdowns or reinforce health systems to deal with a huge burden (O’Callaghan-Gordo & Antó, 2020).

Although research on tourism crisis and disaster management has occurred, it has several limitations in terms of scope and depth. Current and future research on existing crisis management models should focus on conceptual and theoretical tests and refinements through empirical studies, fitting them to pandemic crises in tourism (Ritchie & Jiang, 2019).

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# Chapter 3 – Crisis management frameworks in tourism and hospitality literature

This chapter embarks on a systematic review and critical analysis of existing crisis management frameworks within the tourism and hospitality literature. Through a meta-analytical approach, this chapter examines 36 peer-reviewed studies published between 2000 and 2022, identifying 14 distinct frameworks and evaluating their theoretical foundations, structural components, and contextual applications across various crisis types, including natural disasters, pandemics, economic shocks, and socio-political conflicts.

## 3.1. Publication II - Review of Crisis Management Frameworks in Tourism and Hospitality: A Meta-Analysis Approach

*The material presented in this section has been published in a peer-review journal, Sustainability:*

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### REVIEW OF CRISIS MANAGEMENT FRAMEWORKS IN TOURISM AND HOSPITALITY: A META-ANALYSIS APPROACH

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## ABSTRACT

Given the global impact of COVID-19 (SARS-CoV-2) on the tourism industry, crisis management has once again become a hot topic for research. This article reviews the state of the art in the existing literature on crisis management frameworks in tourism and hospitality through a meta-analysis approach. A total of 36 articles published in peer-reviewed journals between January 2000 and December 2022 were included in this review. The articles covered perspectives of different crisis events, including natural disasters, conflicts, weather-related events and pandemics. The findings show 14 key crisis management frameworks developed in past literature. These findings are critically reviewed, analysing their core concepts in each stage and highlighting their common elements and differentiating components. The study also recognizes the relevance of adopting a multi-perspective approach and proactive planning in crisis management for destinations and tourism organizations to achieve long-term resilience. Lastly, suggestions and directions for future research in this research field are pointed out.

## KEYWORDS

Crisis management; framework; tourism; hospitality; systematic review; PRISMA

### 1. Introduction

The tourism industry is extremely vulnerable to both internal and external shocks, placing tourism under constant threat [1,2]. The recent enduring COVID-19 pandemic has had a profound and far-reaching impact on tourism and hospitality on a global scale, prompting scholars' attention to studying strategies and actions to mitigate the devastating consequences of COVID-19 on tourism [3]. Crisis management comprises the actions,

communications and measures regularly taken by organizations to prevent a crisis, mitigate the impacts caused by one and bounce back to normalcy [4]. Over the years, scholars have studied and produced substantial research related to crisis management in tourism and hospitality [5], from crisis preparedness and prevention and the description of crisis events, crisis impacts and crisis response and recovery to crisis communication, crisis resilience and crisis management, with multiple topics [6].

Reviews on past literature have been also published to consolidate the knowledge on crisis management. Mair, Ritchie and Walters [7] focused on the strategies of post-crisis recovery for tourism destinations. Ritchie and Jiang [8] used a thematic approach to review articles addressing all management stages of crisis. Jiang, Ritchie and Benckendorff [9] conducted a bibliometric analysis to identify the network structures of tourism crisis research. More recently, Wut et al. [10] concentrated on crisis management literature in the fields of tourism and hospitality. Leta and Chan [11] reviewed hospitality literature on crisis management from the perspective of service providers and stakeholders. Lastly, Berbekova et al. [12] employed a thematic analysis to set future research directions for sensemaking in crisis management in tourism and hospitality.

Although the research on tourism crisis management continues to grow, recent studies [5,8] still highlight the importance of continuous testing and improving of crisis management frameworks to develop new theoretical knowledge and management strategies. As a result, the review conducted in this paper strengthens previous review articles by providing an in-depth examination of existing crisis management frameworks, thereby adding to a broader comprehension of their adaptability within the field of crisis management in tourism and hospitality.

The purpose of this article is fourfold and seeks to address the following questions:

- (1) What are the main crisis management frameworks in the tourism and hospitality literature?
- (2) To what type of crisis are crisis management frameworks applied?
- (3) What are the research methodologies employed?
- (4) What lessons can be drawn from existing crisis management frameworks and their applicability to the COVID-19 pandemic crisis?

The remainder of this paper is organised as follows. Section 2 reviews the literature regarding crisis in tourism and crisis management. Section 3 discusses the methodology used to conduct this study and explains the choice of systematic review analysis as the

inquiry method. Section 4 presents the findings of the systematic analysis conducted on crisis management frameworks. Then, Section 5 discusses and compares the identified crisis management frameworks. Section 6 displays the study's conclusions and limitations, outlining directions for future research.

## **2. Literature review**

The concept of a crisis has been applied to different events in tourism, e.g., natural disasters, economic recessions, terrorist attacks, disease outbreaks, political instability, with literature lacking a consensual definition [11,13]. Typically described as adverse incidents, crises inflict negative effects on organizations' or destinations' activities [1]. Thus, a crisis in tourism can broadly be defined as a small or large-scale event that disrupts a well-organized operation, with unknown causes and effects that will impact the stability of the tourism industry [14]. However, some scholars disagree and distinguish the terms "crisis" from "disaster", according to the nature of the event. Unexpected events instigated outside the tourist system over which it has little control are called "disasters", while the term "crisis" is applied only to disruptive and internal events that are partially self-inflicted to the tourism system itself, such as an economic crisis [15].

As scholars do not always agree on the definition of "crisis", there may be some lack of accuracy in the literature and interchangeable use of terms [14]. By acknowledging this fact and for a broader scope, this study will use the term "crisis" to refer to both internal and external events and will review articles that have studied crisis and/or disasters.

Crises are non-linear and chaotic events [16] that impact tourism directly and indirectly with economic, political, social and environmental implications [17], according to their nature, scale and magnitude [18]. For instance, financial crises deteriorate the monetary capacity of tourism demand [15], while epidemic outbreaks may lead to travel restrictions and city lockdowns [19]. Moreover, health-related crises, including epidemic outbreaks, are more susceptible to adverse and negative media attention, making them more challenging to manage [20].

Due to the vulnerability of tourism and hospitality industries to crises, there has been a notable increase in crisis management research over the last two decades [9]. Before 2010, the primary focus of tourism crisis management research was centred on financial crises

and idiosyncratic, one-off incidents, such as 9/11 and unforeseen oil shocks [21]. In the past decade, scholars have begun to turn their attention to environmental crises, approaching them through the lens of environmental sustainability, adaptation to uncertainty and resilience [22]. In the most recent period, COVID-19 has attracted the attention of scholars. The COVID-19 pandemic has had a profound effect on global tourism [23], with severe social and economic repercussions such as travel bans, layoffs and business shutdowns [24]. The COVID-19 virus has had a far more prolonged and complex impact on the tourism and hospitality industries than any other crisis [5], requiring stricter containment strategies than in previous epidemic outbreaks due to its global scale, extended duration, level of uncertainty and capacity for viral mutation [25]. The growing frequency and complexity of such crises highlight the pivotal role of crisis management for destinations, tourism and hospitality organizations [26].

In an environment of unpredictability that characterizes disruptive events such as COVID-19, crisis management emerges as primary tool to help restore normalcy [4,27]. The purview of crisis management encompasses crisis prevention, preparedness, response and revision. Over the years, many studies have addressed research into the response and recovery phases by investigating the impacts and assessing the effectiveness of strategies. However, less attention has been given to studies regarding crisis prevention and preparedness [8].

The survivability of tourism and hospitality industries rely on competent crisis management strategies, both for organizations and destinations [28] and must encompass reactive and proactive procedures [29]. By acknowledging the significance of crisis management for the tourism and hospitality industries, a number of crisis management frameworks have been developed in the literature to provide guidance [30]. These frameworks tend to assist practitioners in mitigating crises, while providing a roadmap for policymaking [31]. Furthermore, throughout the years, scholars have attempted to tailor crisis management frameworks to cater to specific crisis events [8]. Despite the increasing volume of publications, the literature on crisis management remains fragmented and lacking cohesion [1]. Therefore, it is relevant to investigate the frameworks developed in the literature and understand the extent of their contributions.

### 3. Materials and methods

Conducting periodic reviews of existing research to find new contributions to knowledge is key for the advancement of the field [32]. A systematic review is a distinct method for carrying out periodic reviews of existing literature by detecting the available studies, synthesising data and identifying and evaluating contributions to clearly understand what has already been studied and is already known [33]. Systematic reviews are the most consistent form of research review due to their precise [34] and transparent method to reduce bias and bring harmony to the field of research [35]. Thus, this systematic literature review applied the Preferred Reporting Items for Systematic Reviews and Meta-analysis (PRISMA), a method that allows breaking the literature review process into a four-phase flow diagram: (1) identification of connected articles through databases, (2) records screening, (3) eligibility assessment of full-text articles and (4) included studies for analysis [36].

Two international databases were used in this review—Web of Science™ Core Collection and Scopus. This choice of using two databases not only made it possible to cover several fields and add a multidisciplinary perspective, but also allowed the expansion of the research and reduces the scope of bias in journals indexed exclusively in one of the databases [37]. The keywords used to identify relevant articles were “tourism” OR “hospitality” AND “crisis management framework” OR “disaster management framework” in the title, abstracts and keywords in an iterative process to search for a greater number of articles, regardless of the nature of the crisis and industry focus. To appraise a wider spectrum of perspectives on the topic, the search was not restricted to tourism and hospitality journals only. This phase identified a total of 642 records published before 10 December 2022 (Figure 1). The papers identified were then screened for duplicates, and 83 duplicate articles were removed. A pool of 197 articles was also excluded since they were books, book chapters, conference reviews and proceedings or non-English material. In the eligibility phase, the titles, abstracts and full texts of the articles were reviewed and examined to ensure they were relevant to the focus of this study [6]. A total of 326 articles were excluded, as they could not answer this paper’s research questions by: (i) not exploiting or applying any crisis management framework in their study; (ii) focusing only on one element of crisis management (i.e. crisis communications); or (iii) the study purpose is not aligned with the research topic under

analysis. Lastly, a final set of 36 articles was considered suitable and included for subsequent analysis.

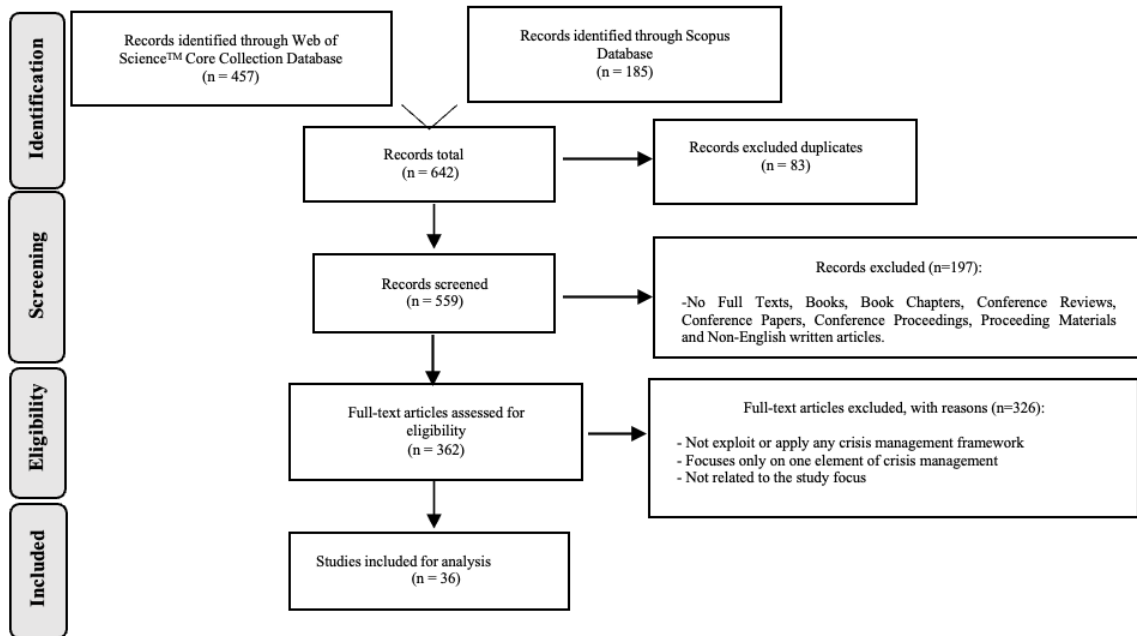


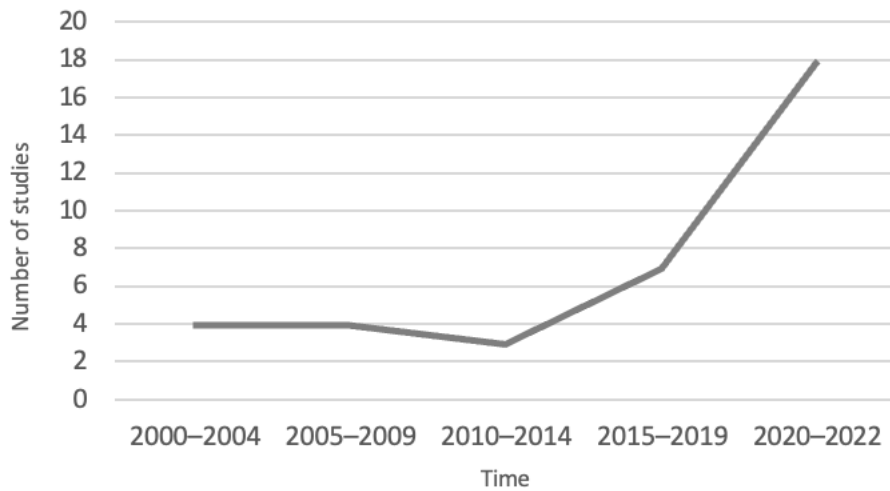
Figure 1. The PRISMA study flow.

## 4. Results

This section provides an in-depth analysis of the profile of the studies under review and methodologies used and details all crisis management frameworks found.

### 4.1. Studies, Journals and Authors

Figure 2 shows the distribution of 36 publications referring to crisis management frameworks in 5-year periods, from 2000 to 2022. Publication numbers increased, particularly in the last decade with the occurrence of more severe natural disasters and COVID-19. Considering how the tourism industry has been and is being heavily impacted by COVID-19, 18 out of 36 articles on crisis management frameworks were published in the last three years.



**Figure 2.** Studies related to crisis management frameworks in literature over time (n = 36).

The results display that 22 (61.1%) of the articles under study came from six journals, all with a high H-index rate (Appendix A). *Tourism Management* published seven articles; *Annals of Tourism Research* had three studies, *Current Issues in Tourism*, *International Journal of Hospitality Management*, *Journal of Travel and Tourism Marketing* and *International Journal of Tourism Research* had three studies each. The others came from 14 different journals, with a publication rate of one article per journal.

Tourism-focused journals were preferred (n = 23, 63.9%) to hospitality-related journals (n = 4, 11.1%) or hospitality and tourism-related journals (n = 2, 5.6%). Journals from other disciplines were also chosen but with less expression (e.g., *Communications*, *Journal of General Management*, *Geographia Technica*, *Journal of Destination Marketing and Management* and *Journal of Park and Recreation Administration*). Location was studied for the country of the journal in which the articles were published. Most journals are Europe-based (n = 27, 75.0%), with British journals being the most predominant (n = 24, 66.7%), followed by American-based ones (n = 7, 19.4%).

Regarding authorship, the majority of studies had two authors (n = 14, 38.9%) or three authors (n = 13, 36.1%). Four-person authorship (n = 4, 11.1%) and single-person authorship (n = 5, 13.9%) were less represented. The most productive scholar was Brent W. Ritchie (n = 7, 19.4%) from Queensland University in Australia, who published two articles as first author, four articles as second and one as fourth author.

#### 4.2. Type of Crisis and Type of Study Analysed

The type of crisis investigated by each article reviewed can be divided into eleven types: conflict, COVID-19 pandemic, cyclone, earthquake, forest fire, health-related crisis,

political crisis, shipping accident, tsunami, multiple natural disasters events and multiple crises (Appendix B). Based on the findings, a large volume of studies has investigated natural disaster crises rather than human-induced or health-related crises.

Empirical studies prevailed in the pool of articles, accounting for around 39% (n = 14). Most studies conducted a case study approach to researching a specific crisis, e.g., [38,39], or a particular tourism destination, e.g., [40,41]. A small sample surveyed several cases of crises that affected a particular tourism region [17,42] or researched a particular type of tourism, such as the passenger shipping industry [43].

Conceptual studies (n = 6, 16.7%) used literature, principles and concepts of other studies or adapted frameworks from previous studies to generate new crisis management frameworks. Pennington-Gray [30] and Faulkner [15] developed conceptual frameworks for natural disaster events; Agustan et al. [44], Jiang, Ritchie and Verreyne [45], and Ritchie [26] developed conceptual frameworks for all crisis events; and Reddy et al. [46] developed a conceptual framework exclusively for armed conflict events.

Eight studies (22.2%) were classified as mixed studies, as they not only created or adapted a framework, but were also applied to a case study, e.g., [47,48].

Lastly, review articles (n = 8, 22.2%) followed distinct approaches to analyse crisis management in tourism and hospitality literature, pointing out some frameworks to deal with crises. Ritchie and Jiang [8] applied a thematic approach to review risk, crisis and disaster management, while Berbekova et al. [12] used a thematic approach to analyse literature concerning crisis management in tourism and hospitality. Mazurek [49] followed a conceptual approach to overview the literature on crises and proactive risk management in tourism, and Leta and Chan [11] carried out a review on crisis management in hospitality. A narrative approach was taken by two studies to analyse post-crisis recovery [7] and crisis management strategies for tourist destinations [42]. Estevão and Costa [50] adopted the PRISMA method to review crisis management practices in tourist destinations during natural disaster crises, and Wut et al. [10] used the same technique to review crisis management practices in the hospitality and tourism industry.

#### *4.3. Methodological Design of Previous Research*

Table 2 depicts the type of approach and data collection methods used to investigate crisis management frameworks in tourism and hospitality. Qualitative approaches were dominant in our review (n = 34, 94.4%). All review and conceptual studies (n = 14,

38.9%) used literature as their primary source of data collection. Four articles (11.1%) used a variety of secondary data in their studies, such as operational information, financial statistics or government response reports. For example, Paraskevas and Quek [51] used archival data from Hilton Hotels to identify correlations between Hilton’s actions before the Cuban revolution and modern-day concepts of crisis management.

In relation to primary sources of data, semi-structured interviews were the most popular means of data collection (n = 9, 25.0%). The samples of interviewees were mostly hospitality and tourism owners or senior managers (e.g., [47,52,53]), destinations management and emergency organizations (e.g., [42]) or key tourism stakeholders [38,54,55]. Interviews were also paired with on-site observation and/or secondary data. Secondary data were acquired from diverse channels such as government reports, tourism policy plans and organizational surveys (e.g., [56,57]); content analysis from newspaper articles (e.g., [41]); public information found on corporate websites and company-related press- releases (e.g., [39,58]); and printed material provided by interview respondents (e.g., [17]). Quantitative approaches were less dominant, summing only two studies (5.6%).

Racherla and Hu [59] conducted a survey to gain the perceptions of senior managers about crisis management, while Wu et al. [40] employed geospatial data to measure the potential risk of severe weather on Oklahoma State Parks.

**Table 2.** Analysis by research methodology (N= 36).

<b>Approach</b>	<b>Method</b>	<b>N. Studies</b>	<b>Studies</b>
Qualitative	Interview	9	[38,42,43,47,52–55,60]
	Interview + secondary data	4	[17,41,57,58]
	Interview + on-site observation	1	[61]
	Interview + on-site observation + secondary data	2	[39,56]
	Literature	14	[7,8,10–12,15,26,30,42,44–46,49,50]
Quantitative	Secondary data	4	[48,51,62,63]
	Survey	1	[59]
	Geospatial data	1	[40]

#### 4.4. Crisis Management Frameworks in Tourism and Hospitality

Of the 36 articles analysed, 14 crisis management frameworks were found, corresponding to the total of conceptual and mixed articles previously identified in Table 2. The literature recognizes that it is crucial to anticipate crises to be able to manage them properly in the future [64]. Thus, over time, scholars have produced different crisis management

frameworks for the tourism and hospitality industry by incorporating theories and concepts from diverse disciplines (Table 3).

Faulkner [15] drew the first natural disaster management framework exclusively for the tourism industry, grounded on previous literature on crisis management, chaos theory and a comparative study of natural disasters that had occurred in the past. Faulkner's tourism disaster management framework was based on the phases of a crisis evolution in a destination, counting six sequential phases: "pre-event, prodromal, emergency, intermediate, long-term (recovery) [and] resolution" [15] (p. 144). In each phase, the author describes key elements of risk assessment, actions and strategies to be taken for an efficient crisis management. Scholars have used Faulkner's framework to study several crisis events. Miller and Ritchie [41] applied it to the outbreak of Foot and Mouth disease in the UK. Prideaux [63] tested the Australian government's response to the impacts of three unrelated crises that severely affected the industry in 2001: the collapse of HIH Insurance, the September 11th terrorism attack and the bankruptcy of Ansett airline. Niininen et al. [43] adapted the framework to the Greek passenger shipping industry to measure the level of crisis preparedness of the industry after two famous incidents (Superfast III and Express Samina). Gani et al. [42] explored the level of preparedness and recovery strategies adopted by tourism stakeholders in two destinations in India during natural disaster crisis. Derham et al. [52] employed Faulkner's framework to the 2004 Indian Ocean Tsunami by studying the response of Australian-based tour operators to the crisis. Permatasari and Mahyuni [60] used it to study the measures taken by the senior leaders of a new hotel in Bali during COVID-19.

**Table 3.** Differentiating elements of each crisis management framework (N = 14).

Study	Elements
[15]	Key prerequisites and ingredients of effective crisis management strategies.
[26]	A strategic and holistic framework with a component of flexibility, evaluation and strategy modification when necessary.
[62]	Risk amplification and stigmatization.
[57]	Dynamic roles of various stakeholders (emergency organizations, tourism organizations and tourism businesses) throughout all phases of a natural disaster crisis event.
[59]	Component of knowledge management strategy and feedback loop.
[30]	The coupling of actors and destination impacts to each crisis phase.
[44]	Integration of knowledge management by incorporating the use of GIS.
[55]	Collaborative approaches to build resilience of entire destinations and tourism businesses within.
[48]	Crisis assessment; safety of employees, customers and property ensured; self-saving and business activation and revitalization.
[46]	The role of vulnerability and resilience in driving the adaptive capacity of post-conflict destinations to adopt a transitory 'Phoenix' phase of initial recovery.
[58]	GPS strategy by taking agile, adaptive, resilient and innovative measures.
[47]	Influential antecedents shape responsive and reactive operational measures from owners-managers in response to the on-going COVID-19 pandemic to ensure business continuity.
[61]	Crisis-coping and post-recovery strategies amongst small and medium-sized hospitality and tourism firms.
[56]	Resilience as a dynamic and cyclical process, linked to each crisis management stage through three steps of dynamic capabilities.

Ritchie [26] delineated a strategic and holistic view to crisis management, suited to natural disaster and human-induced crises, by considering the need for public and private sector managers to plan and limit the impacts of a crisis. The author's framework respects the crisis anatomy proposed by Faulkner [15] and offers a strategic management over three stages: the development of crisis prevention and planning; strategic implementation to limit the impacts and control the crisis; and crisis resolution, evaluation and feedback enabling future crisis prevention and development of anti-crisis planning strategies for tourism destinations and organizations. Nevertheless, Ritchie [26] claims that the need for flexibility, feedback loops, evaluation and potential modification of strategy implementation must be considered at all stages of the process, depending on the unique attributes of each crisis (type, scope and duration) and the stakeholder's response to it. Novelli et al. [39] employed Ritchie's [26] framework to study the strategic process of managing health crises in a developing country context, analysing how the Gambian government and tourism sector responded to the "Ebola-induced tourism crisis". From an anticipating perspective of crisis phenomena, Ritchie's [26] framework was also employed by Wu et al. [40] to analyse the potential risk of severe weather crises in Oklahoma state parks (e.g., tornados, lightning) and to design mitigation measures and recovery strategies for state-level administration. Chan, Nozu and Cheung [54] and Chan, Nozu and Zhou [38] applied Faulkner's [15] and Ritchie's [26] frameworks to collect the tourism stakeholder perspectives on crisis management and destination resilience in the face of earthquake events in Japan.

Another crisis management framework was created specifically for the tourism industry in Taiwan to be able to efficiently manage natural disaster crises [62]. By studying the 21 September 1999 earthquake, the authors noted that while the physical impact caused by the earthquake was short-lived, the impact on the tourism economy was proportionately greater due to a large drop of inbound tourism in the region. Huang et al. [62] proposed a more comprehensive integrated crisis management framework, coupling Faulkner's [15] crisis management guidelines to Ichinosawa's [65] risk amplification and stigmatization model to control both physical and secondary impacts simultaneously. Thus, the incorporation of Ichinosawa's [65] risk amplification and stigmatization model was made in four sequential phases, namely (1) sources of stigma, (2) stigma formulation, (3) stigma ripples and effect and (4) stigma mitigation [62], to understand the engines and impacts of risk-induced stigmatization process, control physical and secondary impacts and stimulate a positive effect on tourism recovery in the long-term using sound crisis management practice.

By examining Kelowna's long-term recovery from a vast forest fire in Canada, Hystad and Keller [57] distanced themselves from the tendency to assess crisis management from a buttoned-up perspective. Instead, the scholars came up with the destination tourism disaster management framework, a cyclic frame with a top-down method to access the interactions of various stakeholders - emergency organizations, tourism organizations and tourism businesses - during the four stages of a natural disaster crisis: (1) pre-disaster, (2) disaster, (3) post-disaster and (4) resolution. Hystad and Keller [57] recognized that stakeholders play different and dynamic roles over time, allowing for on-going review, revision and improvement of existing crisis management plans.

The integration of knowledge management principles into crisis management leads to the development of another framework for knowledge-based crisis management [59]. The authors merged Faulkner's [15] six stages of crisis to Ritchie's [26] strategic crisis management phases, adding three key knowledge management strategies. Knowledge acquisition, creation and storage must occur during crisis prevention and planning, while the strategic implementation phase of crisis management must integrate knowledge retrieval, dissemination and application. In addition, the post-crisis phase integrates resolution, evaluation and feedback processes through knowledge internalisation and feedback for future crisis prevention [59]. Racherla and Hu [59] claimed that by following this process, tourism and hospitality organizations could improve the gain and sharing of critical information, improving their response to any type of crisis.

Pennington-Gray [30] produced the destination disaster impact framework to comprehend the different actors and impacts of natural disaster crisis on tourist destinations, stimulating the destinations for crisis planning and impact mitigation plans. By following a linear flow from a pre-crisis state to emergency and recovery, this framework listed six categories of impacts in natural disaster crises borrowed from Lindell [66]: (1) built environment, (2) social/psychological, (3) cultural, (4) political/economic, (5) technological, (6) natural environment. Additionally, it also identified the set of actors involved in the pre-crisis stage (e.g., emergency managers, urban planners or the hospitality industry) and those who must respond in the aftermath (e.g., government, medical fields, the hospitality industry or tourists). Pennington-Gray's [30] framework was used, for example, by Fung et al. [53] to examine a disease outbreak in the Metropark Hotel group in China.

Agustan et al. [44] framed a crisis management framework specifically for urban tourism destinations, considering risks in urban areas as complex, varied, but connected. Therefore, the scholars combined Faulkner's [15] crisis framework and Mistilis and Sheldon's [67] knowledge management framework, adding the spatial geographical information system (GIS) as a tool to promote response synergies and share of information between emergency command centres, policy makers and tourism stakeholders at all phases of a crisis.

In light of viewing tourism destinations as complex systems vulnerable to crisis, a framework was developed to manage the recovery and development of post-conflict destinations by Reddy et al. [46]. The authors determine that a destination's vulnerability comprises three distinct elements—(1) exposure, (2) sensitivity to impact, (3) adaptive capacity. These elements take post-conflict destinations to an interim phoenix phase, in which their ability to adapt and recover from crises are enhanced to become more resilient. Filimonau and De Coteau [55] added a layer to crisis management by proposing the collaborative destination and natural disaster crisis management framework. The authors show that the tourism destination and businesses must adopt proactive collaborative actions (e.g., innovation, adaptability or human resources) in order to become more resilient to crisis. The framework was then empirically tested using a case study of a Caribbean destination affected by a range of natural disaster events [55].

More recently, Jiang et al. [56] developed a dynamic resilience framework for crisis management, helping tourism organizations acquire resilience based on three dynamic capability steps: sensing, seizing and transforming. Considering resilience as an on-going

and dynamic process, the framework displays key resilience elements (e.g., information monitoring, product adaptation, industry innovation) that must be linked to each crisis management stage (before, during and after) by employing a trial and error process to preserve the competitiveness and resilience of tourism organizations.

#### *COVID-19 Crisis Management Frameworks*

With COVID-19 harshly impacting tourism, scholars are focusing their attention on how to effectively manage the COVID-19 pandemic. A COVID-19 crisis management framework was specifically created to help small and medium-sized tourism and hospitality businesses facing the COVID-19 pandemic [61]. The framework follows a three-state timeline—(1) occurrence, (2) recovery, (3) resolution—displaying all crisis-coping strategies and recovery strategies adopted by small and medium-sized tourism and hospitality businesses in Ghana [61]. Similar research was conducted in Pakistan to assess how hospitality businesses were coping with COVID-19, outputting a framework for crisis management in small and medium-sized hospitality businesses [47]. The framework identifies influential factors (e.g., lack of crisis anticipation, product and experience trade-off) that have shaped different reactive and resilient measures (e.g., operational cost-cutting, preventive measure, innovative promotions) to safeguard businesses continuity during the pandemic [47].

On the other hand, Hao et al. [48] reviewed the impact of COVID-19 on China's hotel industry and introduced the COVID-19 management framework, a framework that followed Faulkner's [15] six phases of crisis management. In addition, it lays out four sequential principles – (1) disaster assessment; (2) safety of employees, guests and property; (3) self-saving; (4) business revitalization - and well-defined anti-pandemic strategies to be implemented by hotels during COVID-19.

The air transportation sector was also severely affected by the COVID-19 pandemic. By analysing how the air travel services sector of Dubai responded to COVID-19, Bodolica et al. [58] shaped a GPS framework for crisis management in air transportation. This framework follows a three-step strategy—(1) guard against failure, (2) potential innovative change and (3) shape the future of air-travel—spurring the implementation of agile, innovative and resilient measures to better manage the effects of COVID-19.

## 5. Critical discussion

The findings of this study illustrate how the crisis management literature has evolved over time, with each crisis event presenting an opportunity to deepen the knowledge and improve the preparedness of tourism and hospitality organizations and destinations. It is identified that most frameworks available in literature share common elements such as risk assessment, crisis planning, crisis communications and a collective mitigation response to the crisis, but vary in their conceptualisation and variables (Appendix C). It is interesting to note that these frameworks carry a positive view on crises, recognizing the importance of proactive planning across the tourist chain to drive the recovery and revitalize tourism in the aftermath [12].

In contrast to the point above, Figure 3 visually unveils the top 25 most cited keywords in the analysed articles concerning crisis management frameworks, via NVivo software (Version 11).

From a critical perspective, this easily underlines that even though the developed crisis management frameworks highlight the need for a proactive approach towards risk assessment and crisis preparedness, most studies still concentrate most of their attention on the impacts caused, the post-crisis phase and recovery strategies [8,10]. By engaging in crisis preparedness, organizations and destinations can expedite their return to normalcy after a crisis by leveraging insights from previous crisis experiences. This knowledge is then integrated into an ongoing and adaptive strategic planning process, enabling them to effectively navigate similar crises in the future [8,68]. Despite the importance of crisis preparedness, research has demonstrated that most small tourism organizations often lack the necessary time and resources to allocate towards crisis planning [69]. As a result, crisis planning is perceived as being of limited relevance to their operations. Moreover, Parmenter [70] also found that the manager's leadership style and commitment to the process are key determinants of effective crisis planning, leaving proactive crisis planning at the discretion of managers. This points out the relevance of planning as a differentiator in post-crisis management, contributing to the preparedness of organizations and destinations and the development of more resilient policies for tourism and local communities [71].



**Figure 3.** Portrait of the 25 most cited keywords in the articles analysed (N = 36).

Three other important critiques should be drawn from the findings on pandemic-appropriate crisis management frameworks.

Firstly, tourism in the Anthropocene is threatened not only by sudden and unpredictable crises, but also by more predictable cause-and-effect events (e.g., pandemics, climate change). Chaos and complexity theory provide a multi-perspective view on crisis management by considering the non-linear and chaotic interactions intrinsic to the tourism system [15,17,26,72,73]. For instance, COVID-19 is distinguished by its complex context of a multifaceted nature and unprecedented magnitude, incorporating features of natural disasters, health crises and economic and tourism demand crises [5]. This growing complexity of crises highlights the need for more multidisciplinary approaches between crisis management and other disciplines, including medical sciences [16]. Thus, pandemic-appropriate crisis management frameworks (e.g., COVID-19) must also take an epistemological angle to incorporate specific crisis management strategies [41,74] through the development of preventive and control sanitary measures to protect the safety and health of tourists, tourism employees and residents [48,75].

This wide-ranging perspective has the potential to allow us to comprehend the relationships, on the edge of chaos and interdependent, that form during a crisis [72] and the adaptive responses of the tourism destination or organization to overcome it [46]. To scope with the complexity and nature of crisis events, a more comprehensive incorporation of technology is imperative at all stages of crisis management [8,16]. For example, scenario planning [2], simulation and signal detection tools [76] can help develop emergency response plans or test evacuation routes for tourists [16]. The integration of GIS tools throughout the planning and response phases can leverage spatial

analysis, visualization and informed decision making [16]. Furthermore, agent-based models can be used to gain new insights into how tourism stakeholders behave in response to external shocks [77,78].

In the same vein, research has shown that pandemics are more exposed to negative attention by media than other types of crises [20] due to the easy and quick sharing of (mis)information on social media [20,26]. As the old adage says, ‘a lie can travel halfway around the world before the truth has put on its boots’. Therefore, the strategic use of social media in crisis communications becomes paramount to effectively managing and facilitating decision making during outbreaks. The frameworks should incorporate key crisis communications measures by developing contingency communication plans during the pre-crisis phase; sharing accurate and up-to-date information on social media during the early-stage crisis; creating promotion and marketing campaigns to generate positive media coverage mid-crisis; and implementing crisis recovery marketing to repair the image of destinations and organizations and increase the perception of confidence in the after-crisis phase [20,48,61,79].

Secondly, tourism exhibits a non-linear and non-deterministic developmental path, marked by chaotic and disruptive crises from time to time. Also, crises by their very nature lack linearity [72]. However, crisis management frameworks have attempted to segment crisis management activities into distinctive phases by following a sequential and prescriptive approach [17]. While some frameworks identified six phases [15,26,44,48,62], others only recognized four [57] or just three [47,56,58,61]. Hence, there is still an ongoing debate among scholars regarding the specific number of phases involved [16].

On the other hand, recent frameworks are being tailored with a more holistic perspective to assess the complex life-cycle of crises and add elaborated and tangled elements of crisis management such as stakeholder collaboration, dynamic capabilities or resilience [55,56]. This supports the observation of Berbekova et al. [12] that crisis management frameworks can be catalogued into two main groups according to their approach to crisis: temporal assessment vs. holistic assessment of crisis events. Nonetheless, although it has been valuable to comprehend the sequential evolution of a crisis, this approach has presented certain limitations by assuming a strictly linear approach. Therefore, it is relevant that future research shifts attention towards extending the traditional crisis management framework to incorporate clusters of interconnected and interrelated activities, which can overlap or take place simultaneously [16].

Lastly, most studies focus on case studies of specific crisis events by adopting frames to examine the crisis management process. A total of 14 different crisis management frameworks for tourism and hospitality were identified. The findings revealed that Faulkner's [15] framework has been revised and improved by authors [80], while Faulkner's [15] and Ritchie's [26] crisis management frameworks have been the most applied to the study of different tourism crisis events. Although there is a growing trend towards developing frameworks with a more holistic perspective to capture the dynamic nature of crises, empirical validation of these newer frameworks remains limited [8]. Future research should prioritize the continuous testing and validation of these frameworks to ensure their effectiveness. Moreover, crisis management frameworks are still infrequently applied to health-related crises [9] and hospitality crisis management at the macro-level, supporting Leta and Chan's [11] research. These findings highlight the need for future research to seek a theoretical deepening of the nature and scale of each event under study to assist in its identification and successful management [8]. Once again, complexity theory may offer a valuable lens to understand the nature and scale of each crisis, as attempted by Reddy et al. [46].

On the other hand, a deeper theoretical understanding of the various typologies of crises in tourism can help to develop more resilient approaches [81] and action-oriented frameworks with practical and effective applications [16]. For example, Hao et al. [48] identified that the current pandemic has led many guests to prefer contactless digital service options in hotels to ensure service safety and reduce the risk of COVID-19 transmission. This finding could be used to scale up the digital transformation of hotels in the post-crisis period and increase resilience to future health-related crises.

Ultimately, a more sustained theoretical foundation will not only foster the development and refinement of frameworks but will also contribute to the generalization, adaptability and transfer of knowledge across different types of crises [8,16].

## **6. Conclusions**

This study systematically reviewed the literature of crisis management in tourism and hospitality to overview the crisis management frameworks developed by scholars. The primary aim of crisis management frameworks is to offer valuable guidance and support to tourism stakeholders in all stages of a crisis event, from the pre-crisis phase to the

actual crisis response and the subsequent recovery process [17]. Therefore, a total of 14 distinctive frameworks were identified and critically analysed above. A comprehensive overview of the major findings and the research methodologies employed in this area of study was provided. The study brought into focus the dynamic evolution of frameworks over time, demonstrating a remarkable shift from traditional sequential approaches to more integrated and flexible perspectives that attempt to recognize the inherent individuality of crisis events.

The analysis of the existing literature revealed a predominant focus on researching a specific type of crisis, mainly natural disasters. Scholars developed different crisis management frameworks to specific contexts and particular crisis events [8]. Unsurprisingly, there has been a surge in research dedicated to understanding the challenges posed by the COVID-19 pandemic and its impact on crisis management over the course of the last three years.

Crisis management research will likely continue to be a hot topic for the foreseeable future, as the rate of new pandemics is expected to increase in the Anthropocene [82]. As we progress towards increasingly intricate events such as pandemics and environmental crises, it becomes crucial to establish a stronger theoretical foundation for research in crisis management. A complexity-based perspective presents a road map for a more comprehensive understanding of crisis management and planning by moving beyond the traditional sequential approaches [46]. This integration will drive the refinement of crisis management frameworks with a more action-oriented lens and bolstering their resilience to crises of varying natures and scales.

Additionally, this study offers valuable practical insights for both scholars and practitioners. Considering the relevance of crisis preparedness in crisis management, one recommendation for both scholars and practitioners is to keep developing proactive crisis planning plans. A better integration of technology at all stages of crisis management is another recommendation. Technological tools can help tourism organizations and destinations to incorporate effective contingency plans in the pre-crisis period, facilitate information sharing via social media during the crisis and aid post-crisis recovery. Lastly, it is important that scholars and practitioners use their empirical investigations to refine and improve existing crisis management frameworks, ensuring their generalisation and applicability to different crises in comparative and longitudinal studies, rather than single-case studies, to fortify the empirical results [7]. By continuously enhancing these efforts, transfer of knowledge will be facilitated across all stages of crisis, fostering the

development of more resilient crisis management frameworks for the tourism industry in times of crisis.

The research findings of this study are subject to certain limitations that must be highlighted. First, the research process was limited to (i) articles available on Web of Science™ Core Collection and Scopus databases; (ii) articles published in English; and (iii) only to research or review articles. Secondly, the criteria used for the inclusion of articles to be analysed were restricted, possibly leaving out articles that did not contain the keyword framework but could cover other crisis management frames. Consequently, the possibility exists that some other valid findings may have been unintentionally left out. Therefore, future research may consider broadening the subject selection criteria or broadening the search criteria to relevant research published in other databases, in different languages, in other document formats and by including other complementary keywords in the literature search.

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**Data Availability Statement:** All relevant data generated and analyzed during this research were collected from the Scopus and Web of Science databases and are accessible with the help of the search query mentioned in the materials and methods section.

**Conflicts of Interest:** The authors declare no conflict of interest.

## Appendix A

**Table 4.** List of Journals (N = 36).

Journal	No. Studies	H-Index	Country
Tourism Management	7	199	United Kingdom
Annals of Tourism Research	3	171	United Kingdom
Current Issues in Tourism	3	74	United Kingdom
International Journal of Hospitality Management	3	122	United Kingdom
International Journal of Tourism Research	3	58	United Kingdom
Journal of Travel and Tourism Marketing	3	73	United States
African Journal of Hospitality, Tourism and Leisure	1	11	South Africa
Asia Pacific Journal of Tourism Research	1	37	United Kingdom
Communications—Scientific Letters of the University of Zilina	1	21	Slovakia
Cornell Hospitality Quarterly	1	75	United States
European Journal of Tourism Research	1	16	Bulgaria
Geographia Technica	1	11	Romania
Journal of Destination Marketing and Management	1	39	United Kingdom
Journal of General Management	1	20	United Kingdom
Journal of Hospitality and Tourism Insights	1	70	United States
Journal of Park and Recreation Administration	1	-	United States
Sustainability	1	85	Switzerland
Tourism Analysis	1	36	United States
Tourism Review	1	32	United Kingdom
Worldwide Hospitality and Tourism Themes	1	20	United Kingdom

## Appendix B

**Table 5.** Analysis by type of crisis and study (N = 36).

Total	Type	Empirical	Conceptual	Mixed	Review
1	Conflict	0	1	0	0
4	COVID-19	1	0	4	0
1	Cyclone	0	0	1	0
3	Earthquake	2	0	1	0
1	Forest fire	1	0	0	0
4	Health-related crisis	4	0	0	0
1	Political	1	0	0	0
1	Shipping accident	1	0	0	0
1	Tsunami	1	0	0	0
6	Natural disasters (multiple)	2	2	1	1
12	Crises (multiple)	1	3	1	7
36	Total	14	6	8	8

## Appendix C

**Table 6.** The crisis management frameworks analysed (N = 14).

Framework	Phases			Components													Structure		Type of Crisis	
	Pre-Crisis	Crisis	Post-Crisis	Risk Assessment	Contingency Plans	Mid-Crisis Management	Crisis Communications	Evaluation and Review	Flexibility	Stigma	KM	GIS	GPS	SC	DC	RE	SE	CY	CS	ND
[15]	X	X	X	X	X	X	X	X									X			X
[26]	X	X	X	X	X	X	X	X	X								X		X	
[62]	X	X	X	X	X	X	X	X		X							X			X
[57]	X	X	X	X	X	X	X	X	X					X				X		X
[59]	X	X	X	X	X	X	X	X	X									X		X
[30]	X	X	X	X	X	X	X	X									X			X
[44]	X	X	X	X	X	X	X	X	X			X	X				X		X	
[55]	X	X	X	X	X	X	X	X	X					X				X		
[48]	X	X	X	X	X	X	X	X									X		X	
[46]	X	X	X			X											X		X	
[58]		X	X			X							X				X		X	
[47]	X	X		X	X	X			X							X	X		X	
[61]		X	X			X	X	X									X		X	
[56]	X	X	X	X	X	X	X	X	X						X	X		X		X

Abbreviations: KM, knowledge management; GIS, geographical information system; GPS, three-step strategy; SC, stakeholders' collaboration; DC, dynamic capabilities; RE, resilience; SE, sequential; CY, cyclic; CS, all type of crisis events; ND, natural disaster crisis events only.

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# Chapter 4 – Unveiling Visit Portugal crisis communication during COVID-19

In this chapter, an in-depth analysis is conducted of the crisis communication strategies adopted by Visit Portugal - the NTB responsible for promoting Portuguese tourism destinations - in response to the COVID-19 pandemic. Guided by the SCCT, the chapter explores how Visit Portugal adapted its social media messaging to align with stakeholder expectations, reinforce trust, and promote safety. In doing so, it assesses the board's efforts to protect the destination's image and contribute to reputational resilience amid the unprecedented challenges posed by the pandemic.

## 4.1. Publication III – DMOs and Social Media Crisis Communication in Low-Responsibility Crisis: #VisitPortugal Response Strategies During COVID-19

*The material presented in this section has been published in a peer-review journal, Tourism and Hospitality:*

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### DMOs AND SOCIAL MEDIA CRISIS COMMUNICATION IN LOW-RESPONSIBILITY CRISIS: #VISITPORTUGAL RESPONSE STRATEGIES DURING COVID-19

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## ABSTRACT

Guided by the situational crisis communication theory (SCCT), this study explores how a destination marketing organization (DMO) managed crisis communication during a prolonged low-responsibility crisis. It analyzes the production process of crisis communication, the crisis communication content shared on Facebook to protect the destination's image during COVID-19, and evaluates which crisis response strategies led to higher audience engagement. This study used a single instrumental case study with an exploratory sequential approach. A semi-structured interview was conducted with Visit Portugal's Communication and Digital Marketing Director. Then, Facebook content from Visit Portugal, posted between 1 January 2020 and 5 May 2023, was collected and analyzed. By analyzing the DMO's crisis communication workflow, decision-making processes, and content shared on social media, it was found that secondary response strategies effectively safeguarded and improved the destination's image, leading to higher audience engagement. This study provides DMOs with valuable insights into the development of effective crisis communication strategies when navigating low-responsibility crises.

## KEYWORDS

Crisis communication; SCCT; destination marketing organization; COVID-19; social media; Facebook

## 1. Introduction

A sudden occurrence that leads to an unfavorable situation is called a crisis (Laws & Prideaux, 2005). The tourism industry is highly vulnerable to crises (Ritchie, 2004). Just in the past few years, tourism destinations have faced different types of crises, including terrorism attacks, natural disasters like earthquakes, hurricanes, floods (Mansfeld & Pizam, 2006), and health-related crises such as the SARS outbreak, the Ebola virus, and the recent COVID-19 pandemic (Gössling et al., 2021; Novelli et al., 2018). These events frequently culminate in devastating and long-lasting impacts on destinations (Faulkner, 2001). Short-lived adverse incidents can trigger abrupt damage to the destination's image, while extensive and prolonged negative events can result in a more enduring impact on the destination's image (Avraham & Ketter, 2013). Destination marketing organizations (DMOs) are policy tools that assist the tourism industry by managing and coordinating destination activities, strengthening the industry's capabilities (Dredge, 2016), and playing a pivotal role in developing and promoting the destination's brand and image (Pike, 2006). DMO-generated communications are highly valuable in directly informing current and potential tourists (Labanauskaitė et al., 2020), as it significantly influences tourist perceptions, notably destination awareness and image (Huerta-Álvarez et al., 2020).

Accordingly, crisis communication emerges as a critical component of destination recovery (Lehto et al., 2008). Crises are turbulent events that drive individuals to seek information to comprehend and rationalize the situation at hand (Sellnow & Seeger, 2013). Crisis communication covers the strategic processes of managing both the dissemination of crisis-related information and shaping people's perceptions about the crisis and the organization involved. These strategies aim to minimize adverse effects and restore trust and reputation (Coombs, 2010). During the crisis, communication focuses on mitigating the harm caused to an organization and its stakeholders, prioritizing public safety above all else (Coombs, 2019). Furthermore, post-crisis strategic communication seeks to reposition the organization as safe, thereby repairing its reputation (Coombs, 2007, 1999).

In destination-wide crises, the DMO should assume the role of tourism manager, disseminating crisis information to tourists and local tourism businesses, in coordination with official sources such as emergency responders and government authorities (Pennington-Gray et al., 2009). This top-down communication approach ensures consistency in the information provided, maximizes information reach, and enhances its credibility, which is

crucial for tourists who may access information from various channels (Barbe & Pennington-Gray, 2020). Experimental research shows that media coverage of health crises directly impacts perceived risk and, subsequently, influences attitudes toward tourism experiences (Liu et al., 2016). Moreover, the marketing efforts undertaken by DMOs during health crises are especially vital for nurturing loyalty and fostering engagement among repeat visitors (Otoo & Kim, 2018).

A key theoretical framework in the domain of crisis communication research is the situational crisis communication theory (SCCT). SCCT employs an attribution-based approach to assist organizations in developing tailored crisis response strategies, based on the type of crisis and perceived responsibility by the public (Coombs & Tachkova, 2023). This approach underscores the need for appropriate responses to protect organizational reputation assets (Coombs, 2007) and to avoid undesirable behavioral intentions during times of crisis (Coombs & Holladay, 2002). These response strategies should be chosen according to the type of crisis, its severity, and the organization's level of responsibility for the crisis (Coombs, 2015). Crises vary from simple, moderate to complex, or extreme, such as prolonged crises and scams (Coombs et al., 2021). Depending on the perceived attribution of responsibility, SCCT recommends the use of specific response strategies, ranging from primary crisis response strategies—deny, diminishing, and rebuilding—to secondary response strategies—bolstering (Coombs, 2007). The use of deny strategies aim to distance the organization from the crisis by refuting its existence or its responsibility, while diminishing strategies seek to mitigate the organization's responsibility for the event or its adverse impacts (Coombs, 2007). Rebuilding strategies focus on restoring the organization's reputation through compensating victims and seeking forgiveness (Coombs, 2007). On the other hand, bolstering strategies involve portraying the organization as a victim of the event and reminding stakeholders of its past good works (Coombs, 2007, 2023). Kim and Liu (2012) augmented the SCCT with two supplementary secondary response strategies - enhancing and transferring - crafted to incorporate the organization's good deeds during a crisis, aligned with public interests. Natural disasters and health-related crises (e.g., the COVID-19 pandemic), also known as low-responsibility crisis, are events where tourism organizations hold minimal responsibility (Faulkner, 2001).

The use of crisis response strategies that prioritize public well-being over organizational interests has the potential to lead to more positive outcomes, particularly in crises where the organization holds low responsibility (Kim et al., 2011), as in the case of a prolonged

pandemic. This aligns with the principles of SCCT, which underscore the significance of proactive and open communication in mitigating the propagation of negative word-of-mouth (Coombs, 2007). When stakeholders perceive an organization's response as genuine and comprehensive, they are less inclined to engage in negative word of mouth, thereby enhancing trust and mitigating reputational damage (Chung & Lee., 2021). Despite the findings of previous studies reveal limited effectiveness of primary response strategies in mitigating threats to organizational reputation (Ma & Zhan, 2016), research has frequently neglected to consider the relevance of secondary crisis response strategies (Leung et al., 2022).

The SCCT has been a commonly used framework in tourism and hospitality research (Liu-Lastres, 2022). For instance, the SCCT has been employed to study the communication strategies used by multiple destination management organizations over Twitter during terrorist attacks (Barbe et al., 2018). In the context of health-related crises, Liu-Lastres (2022) underlined the importance of employing SCCT to assess the crisis response strategies of hotels during health emergencies. In a study of hotels facing a bed bug health crisis, bolstering and enhancing emerged as the two most prevalent crisis response strategies (Liu et al., 2015). More recently, an empirical study explored how airlines might employ appropriate crisis response strategies on Twitter to restore their reputations and recover from COVID-19. The study investigated the impact of these strategies on travelers' behavioral intentions, such as booking intentions and Twitter likes (Leung et al., 2022). Analyzing the types of crisis response strategies used by a national DMO on social media during COVID-19 is essential for understanding which strategies triggered the highest levels of public engagement, thereby contributing to the broader discourse on effective crisis communication in the tourism sector.

The rise of social media has revolutionized the crisis communication environment (Eriksson, 2018), making it more challenging for destinations to manage health-related crises, as these events are more exposed to negative media scrutiny (Schroeder & Pennington-Gray, 2015). Additionally, research has demonstrated that social media influences public reactions to crises (Dong et al., 2021). Social media platforms such as Facebook focus on current happenings, enabling DMOs to disseminate real-time information (Hays et al., 2013), restore the destination's image, and re-start tourism (Beirman, 2006). Regularly being the primary source of news and information during crises (Westerman et al., 2014), social media has revolutionized the landscape of crisis communication by enabling immediate interaction

between organizations and their audience (Sigala, 2011). Additionally, the interactive and open nature of social media fosters secondary crisis communication, which encompasses the user's online behaviors of sharing, forwarding, or commenting on crisis-related content (Utz et al., 2013; Schultz et al., 2011). Consequently, social media platforms have become a predominant communication tool for marketers seeking to rebuild a positive image of organizations, including destinations, in the post-crisis phase (Avraham & Ketter, 2016; Avraham, 2015). The extant literature on social media and crisis communication in tourism has been exploring four dimensions: the use of social media by tourists during a crisis, the industry's adoption of social media for crisis communication, the impact of social media on risk perceptions and reputation, and the role played by social media during crises (Barbe & Pennington-Gray, 2020).

Tourist-specific studies have investigated tourists' use of social media to obtain crisis information during their travels (Schroeder et al., 2013) and to communicate in the event of natural disasters (Park et al., 2019), destination attacks (Zhai et al., 2019), hotel assaults (Su et al., 2019), and the COVID-19 pandemic (Liu-Lastres et al., 2022). Additionally, Liu et al. (2015) analyzed how social media discourse during crises (i.e., the New York bed bug crisis) impacted tourist perceptions. A study by Filieri et al. (2021) demonstrated how Instagram users with an emotional connection to a destination express empathy and call for unity during crises (i.e., terrorist attacks). Furthermore, scholars have also employed web analytics to identify crisis communication influencers and opinion leaders (Park et al., 2019).

Industry-specific studies have examined crisis communication practices in hotels (Zizka et al., 2021; Möller et al., 2018; Barbe & Pennington-Gray, 2018), DMOs (Barbe et al., 2019; Oliveira & Huertas, 2019; Barbe et al., 2018), airlines (Leung et al., 2022; Ou & Wong, 2021), and cruise lines (Liu et al., 2016; Ryschka et al., 2016). Specifically, prior research explored the strategic use of social media by hotels to communicate during health-related crises (Liu et al., 2015). Ketter and Avraham (2021) explored the adaptation of digital marketing strategies by DMOs, involving digital ads and YouTube content, while Mele et al. (2023) investigated DMOs' strategic use of Instagram for effective communication during COVID-19.

Despite these contributions, research on social media and crisis communication is still in its early stages (Filieri et al., 2021; Spence et al., 2016). Research in the field of social media crisis communication in tourism has primarily focused on the general use of social media. When focusing on specific platforms, scholars most frequently analyze TripAdvisor and

Twitter (Barbe & Pennington-Gray, 2020). Studies on Facebook - the world's most popular social media platform with more than three billion monthly active users worldwide (Statista, 2024) - remain limited, underscoring the importance of analyzing DMOs' use of this platform during a global health crisis. This study focuses on Facebook, offering a broader understanding of social media crisis communication strategies and complementing existing research, which has largely prioritized other platforms.

In addition to serious public health implications, pandemics typically instigate devastating socioeconomic and political crises in affected destinations (Chakraborty & Maity, 2020). The COVID-19 pandemic was one of the most profound health crises in recent history, significantly affecting the global tourism industry (Fauci et al., 2020). Just in 2020, the tourism industry experienced a dramatic 74% decline in international tourist numbers and an unprecedented loss of one trillion US dollars in export revenues, highlighting the extensive damage inflicted by the pandemic on the tourism sector worldwide (UNWTO, 2020). Given the scale of this impact, scholars have studied the crisis communication messages sent by tourism stakeholders during the prolonged COVID-19 pandemic (Mele et al., 2023; Kwok et al., 2022; Salem et al., 2022; Scheiwiller & Zizka, 2021). DMOs are pivotal in the tourism industry, as they are responsible for the promotion and management of destinations (Pike & Page, 2014). Understanding how DMOs communicate during a pandemic can provide best practices for managing future health-related crises and reducing the impacts on the tourism industry (Mele et al., 2023; Ketter & Avraham, 2021; Sigala, 2020). Recent studies underscore the need for further research into how DMOs leverage social media marketing and communication during the prolonged COVID-19 pandemic, highlighting its critical role in navigating and recovering from the crisis (Li et al., 2022; Ketter & Avraham, 2021). This study provides a practical, case-based examination of how DMOs leverage social media to navigate a prolonged pandemic crisis, offering empirical insights to help destination managers in developing more effective communication strategies for future recovery (Leung et al., 2022). Moreover, while previous studies have examined how social media is used for crisis communication, there has been limited attention on understanding the production process of crisis communication and the marketing strategies implemented during crisis events (Mele et al., 2023; Ketter, 2016). In this regard, this study provides a novel contribution by being the first to examine the crisis communication production process, offering new insights into how DMOs formulate, disseminate, and adapt their messaging strategies during prolonged crises. In addition, research must prioritize

testing theory-based messages to optimize the usefulness of crisis communication strategies across different platforms (Liu-Lastres, 2022). In line with this call, this study explores which crisis response strategies generate the highest levels of audience engagement during a prolonged low-responsibility crisis, offering valuable insights for optimizing crisis communication.

To address these gaps, the purpose of this paper is threefold and aims to address the following research questions:

RQ1: How does a DMO outline its crisis communication decision-making process on social media during a prolonged low-responsibility crisis such as COVID-19?

RQ2: How can a DMO use Facebook to safeguard the destination's image during a prolonged low-responsibility crisis such as COVID-19?

RQ3: What type of response strategy leads to a greater impact on audience engagement?

The paper is structured as follows. Section 2 presents the methodology used in this study, followed by an explanation of the study findings in Section 3. Finally, Section 4 discusses the findings and outlines the study's conclusions and limitations, suggesting directions for future research.

## **2. Materials and methods**

This study employed a single instrumental case study with an exploratory sequential approach to critically examine the crisis communication dynamics on social media during a low-responsibility crisis affecting a destination. Case study research is a method designed to investigate and analyze either a single or a collective case to explore the complexity of the object of study (Stake, 1995). In the context of crisis management research, case studies are a preferred methodological approach, frequently adopted to examine single-crisis events, tourism destinations, or tourism sectors (Ritchie & Jiang, 2019). Moreover, qualitative methodologies dominate crisis management studies, mainly with semi-structured interviews and secondary data analysis being among the most used methods (Ritchie & Jiang, 2019). To ensure a more comprehensive methodological approach, an exploratory sequential approach was adopted. This approach is a mixed-method design that combines the strengths of both qualitative and quantitative data collection and analysis in sequential phases (Creswell & Plano Clark, 2018), enriching the study's methodological rigor and validity. Therefore, this study was conducted in two stages to address the research questions. The first

stage entailed a semi-structured interview with the Visit Portugal’s Communication and Digital Marketing Director, conducted in May 2022. Semi-structured interviews are a qualitative technique that uses open-ended questions, enabling follow-ups and discussions to gain deeper insights (Patton et al., 2015). This stage adopted a single-interviewer approach in accordance with Whiting’s (2008) suggestion and supported by her detailed interview guidelines. The semi-structured interview protocol was developed based on a thorough review of existing literature on crisis communication in tourism, ensuring alignment with the study’s research questions and the specific context of the case under study. Prior to the interview, the participant was provided with a detailed overview of the study, including its main objectives, methodology, and potential contributions. Following this, formal consent was obtained for both participation and the audio recording of the interview. The interview lasted for 48 min, during which the interviewee was asked about the organization’s crisis communication processes and workflows during the pandemic, as well as the digital communication campaigns that were created to respond to COVID-19 and help restore the destination’s image. The interview was audio-recorded and subsequently transcribed. Two researchers, each bringing a different academic perspective, carefully examined the transcript using content analysis.

The second stage of this study involved data collection from the official Visit Portugal Facebook page. All posts shared in English or Portuguese between 1 January 2020 and 5 May 2023 were manually collected in chronological order to capture crisis communication in the period immediately preceding the spread of COVID-19 in Europe and during and up to the time the WHO declared the end of COVID-19 as a global health emergency. Hashtags are often used in tourism-related crisis communication, as they serve as a centralized repository of information for users seeking relevant updates and news during crises (Barbe & Pennington-Gray, 2018). The metadata collected included the entire post content, including the hashtags used, the number of likes or other reactions, the number of shares, and comments. Table 7 displays the descriptive information for the collected posts.

**Table 7.** Total Facebook posts collected (n = 1285).

<b>Month</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>
January	40	16	40	20
February	39	19	40	27
March	37	18	2	25
April	18	24	27	28
May	22	33	36	5
June	39	23	35	---

July	43	22	35	---
August	51	27	33	---
September	39	30	47	---
October	42	38	46	---
November	44	40	38	---
December	35	36	26	---
Total	449	326	405	105

The posts were then coded based on two main criteria. Firstly, it was classified whether the message was related to the COVID-19 crisis or other theme. Secondly, all COVID- related posts were systematically classified based on the type and sub-category of crisis communication strategies employed (Coombs, 2007; Kim & Liu, 2012). User engagement is defined as the cognitive, affective, or emotional responses users have towards media content or brands (Broersma, 2019). Social media engagement is commonly quantified through engagement metrics, which measure user interactions such as likes and other reactions (e.g., love and care), shares, and comments on a post (Le, 2018). These behavioral interactions are considered key indicators of how audiences engage with content on social media platforms (Barklamb et al., 2020). In line with this approach, engagement levels in this study were assessed based on the count of likes or other reactions, shares and comments. To ensure ethical integrity, the analysis was conducted using only aggregated metrics, without identifying users or private information. By doing so, this study complies with ethical guidelines for social media research, which consider the analysis of publicly available, aggregated data as permissible without requiring user consent (Stommel & Rijk, 2021).

Two researchers independently coded an entire set of 1285 Facebook posts, and Cohen's  $\kappa$  was employed to test inter-coder reliability. There was a 100 percent agreement on the assessment of COVID-related vs. non-COVID messages, as well as on the assessment of the crisis response strategy used in each message. Furthermore, it also achieved a high level of agreement when coding the employed sub-categories of crisis response strategy ( $\kappa = 0.95$ ) (only 3 of 58 messages were coded differently by the two coders). Lastly, content analysis was conducted using Atlas.ti, followed by a sequential exploratory strategy where quantitative analysis assisted in explaining and complementing the qualitative results (Creswell, 2014).

### 3. Results

#### *3.1. The Decision-Making Process Behind the Implemented Crisis Communication*

Confronted with the unprecedented severity and scale of the pandemic, the DMO established a dedicated committee in late November 2019 to strategize and implement the destination's crisis communication efforts. This committee comprised key officials, including the organization's president, the coordinating director of destination promotion, the communication and digital marketing director, and the territorial marketing director. The committee members were selected not only for their technical knowledge in communication and marketing, as well as in their ability to make and execute decisions in real time, enabling them to respond to the crisis challenges as they arose and streamline processes.

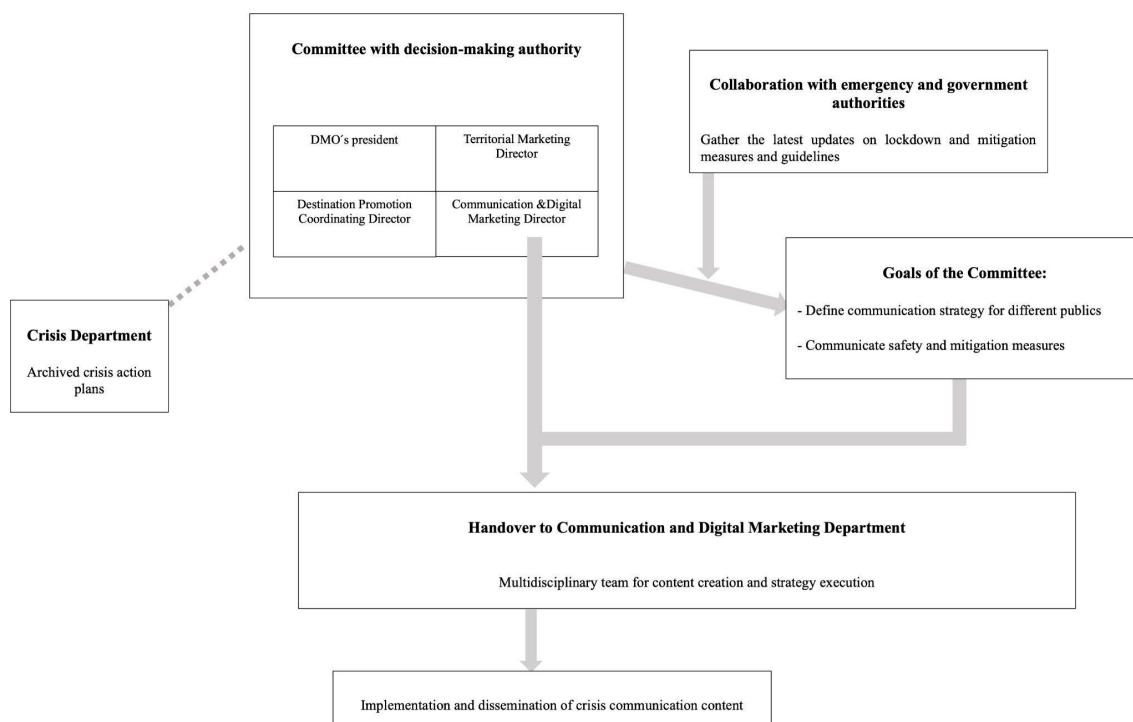
The committee first incorporated existing documentation and action plans from the organization's crisis department, which was originally created to address a large-scale wildfire event in the central region of the country. They then developed an internal crisis management document outlining key contacts, operational procedures, and decision-making authorities. In the initial phases of the pandemic lockdown, weekly committee briefings were held to align the response strategy. The committee's primary challenge included the management of air travel and accessibility issues, as well as addressing concerns related to passports and vaccinations. To tackle these complex matters, close interaction with SEF (Foreigners and Borders Service), DGS (Portuguese Health Authority), and the Council of Ministers was crucial to access the latest information and ensure accurate interpretation of laws.

The committee's primary goal was to define and align a communication strategy with a focus on tourists and the business sector, while ensuring public awareness regarding safety measures and mitigation efforts. These guidelines were then handed over to the communication and digital marketing department, which worked alongside a multidisciplinary team including copywriters, videographers, photographers, advertising and communication agencies, public relations (PR) agencies, creative agencies, and digital ecosystem consultants. This collaborative team was entrusted with the responsibility of conceptualizing and developing all crisis communication content and marketing campaigns, to be shared on social media platforms. The collaborative and multidisciplinary workflow enabled the creation of targeted and differentiated content for these social media platforms. Facebook played a central role in the dissemination of this information due to its capacity to

accommodate longer and more descriptive posts. The Visit Portugal’s Communication and Digital Marketing Director explained the following during the interview:

*All our social media platforms are managed differently. Facebook, in particular, is used in a more descriptive manner in our communications, specifically during COVID-19. We provide detailed explanations, share longer and more elaborate texts, use a lot of video content, and share many stories. This approach is crucial for giving people a glimpse into daily happenings and experiencing the life of the tourist destination.*

Figure 4 illustrates the DMO’s crisis communication decision-making process work- flow during the pandemic.

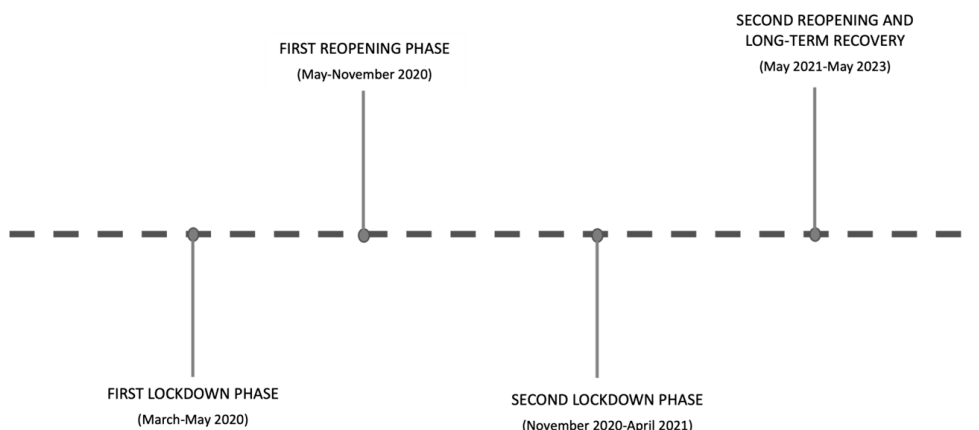


**Figure 4.** Visit Portugal’s crisis communication decision-making workflow.

### 3.2. Communication Strategies to Safeguard the Destination’s Image During the Prolonged Low-Responsibility Crisis

Throughout the research timeframe, the COVID-19 lifecycle in Portugal was segmented into four distinct phases: the first lockdown phase (March–May 2020), the first reopening phase (May–November 2020), the second lockdown phase (November 2020–April 2021), and the second reopening/long-term recovery phase (May 2021–May 2023) (Figure 5). Different

strategies were employed throughout the prolonged crisis, with a sharp contrast between the approaches used during the COVID-19 lockdown phases and those implemented during the reopening phases.



**Figure 5.** Timeline of COVID-19 lockdowns in Portugal.

Visit Portugal demonstrated remarkable agility in their communication strategies as the COVID-19 crisis unfolded. In the first lockdown phase (March–May 2020), the DMO used Facebook for the purpose of reputation management, using exclusively bolstering response strategies. During crises, it is common to identify a scapegoat, allowing victims to unite and channel their emotions towards overcoming the crisis (Coombs & Holladay, 2010). The shared crisis communication posts portrayed the destination as a victim, focusing on messages of hope for better days with the #CantSkipHope campaign, inspiration for the future, unity, and resilience in facing the pandemic (Ketter & Avraham, 2021). Some examples of these posts include:

It's time to stop.

Time to reset, time to recenter, time to switch off so we can move on.

The best part of it all? We are in this together. ❤️

#CantSkipHope [Post shared on 21 March 2020]

Ready for a Lisbon travel escape from the comfort of your couch? Yep, you can do it with our video on board Tram 28. Tour the city from Martim Moniz to Campo de Ourique and get to know all the important sites along this route. Learn more: <https://bit.ly/2Jtm9UE>

#CantSkipHope #Living #LisboaRegion [Post shared on 15 April 2020]

As in the rest of the world, the Azores is taking a break. Let's dream about these 9 breathtaking islands.

Learn more: <https://bit.ly/2Sm7ijv>

#CantSkipHope #Nature #Azores [Post shared on 14 May 2020]

As tourism sites were starting to reopen and airlines resumed flights in the first reopening phase (May–November 2020), Visit Portugal used rebuilding response strategies to provide tourists with safety information. Additionally, they mainly employed bolstering and enhancing response strategies to reassure and attract visitors. Marketers can capitalize on citizens' feelings of patriotism and local pride during crises to effectively promote products and destinations (Avraham, 2020). The #CantSkipOpening campaign marked the reopening of tourism. Meanwhile, the “You can” campaign (#TuPodes) encouraged locals to explore and rediscover their own country, celebrated as the best destination in the world, fostering national pride and solidarity until foreign tourists return. Marketers can also turn a crisis into an opportunity by highlighting the DMO's positive actions during the event, transforming the negative situation into a positive narrative (Avraham & Ketter, 2008). Visit Portugal launched the collaborative “Unwanted Shape” campaign with MEO (a leading telecommunications provider in Portugal) and World Surf League, which involved creating surfboards from recycled plastic, including COVID-19 waste, to be used in the Portuguese competition in 2021 and with the ambitious goal of using only recycled surfboards in competitions by 2028. Some examples of these posts include the following:

#Portugal is the first European country to receive the World Travel & Tourism Council's Safe Travels Certification.

This seal aims to recognize destinations that comply with health and hygiene protocols in line with the Safe Travel Protocols issued by the WTTC.

More info: <https://bit.ly/2XJQEO7>/<https://bit.ly/3cNGC2w> #SafeTravels [Post shared on 9 June 2020]

With the spirit and strength that characterize us, we gradually turned things around. And Portugal is back. Now you can come back, you can visit and travel around our country. The time has come to set out to rediscover yourself and return to the Best Destination in the World.

You can. #Tupodes [Post shared on 15 June 2020]

Can't Skip Opening

We've hoped for better days and today Portugal is ready to welcome everyone in a safe and relaxed atmosphere. We're waiting for you. #CantSkipOpening

+ Info: <https://bit.ly/3hBB3rB> [Post shared on 16 June 2020]

**\*CALLING ALL SHAPERS AND OCEAN LOVERS\***

We care about our world and we know you care too. Our oceans are suffering the impact of waste that results from COVID-19. So we are raising our voices to create awareness for this problem.

We officially challenge every shaper out there to create surfboards with the COVID-19 related waste you can find in the ocean. The winning boards will be chosen by five of the world's best shapers and will be used by the best surfers at MEO Peniche Pro 2021. [Post shared on 19 October 2020]

Transitioning from the first reopening phase, Portugal soon faced a second lockdown (November 2020–April 2021), which implied further adjustments and responses to address the ongoing crisis. Despite the fluctuating circumstances, Visit Portugal maintained a consistent communication strategy, using rebuilding strategies to keep the public informed about sanitation measures and using secondary response strategies to keep them engaged and connected. The DMO's creativity shone through in their crisis communication. For instance, recognizing that physical travel was not feasible, they pivoted a campaign to promote literary tourism. This was exemplified by encouraging the public to “travel” through reading, tapping into the rich cultural and literary heritage of Portugal. Some examples of these posts include the following:

Yes, we can travel through books. They're real treasures that take us to places far away and so much different than those of our daily lives. This is the ideal moment to read and explore Portugal through literature. We bet you'll feel more inspired for your future travels.

Learn more: <https://bit.ly/3mrGOdr>

#Culture #Portugal [Post shared on 3 December 2020]

4 #Portuguese regions in the list of “#Safest #Destinations to #visit in 2021” by European Best Destinations:

➡ #madeira

➡ #Azores

➡ #Lagoa, #Algarve

➡ #Alentejo

#Portugal #Visitportugal #dreamnowtravellater [Post shared on 12 January 2021]

The last time I saw Lisbon | via Budget Traveller

“It is tough to predict the future but one thing I do know for sure, that when it is safe for us to travel again, I definitely will be returning to Lisbon.

While I am missing my annual January pilgrimage, I am happy to wait for Lisbon. All I have to do is close my ears and eyes and I am back there, walking the streets again. I can hear the passionate voices from the local tascas, the warm roasted smell of freshly brewed bicas and the vexed voices of silvery haired ladies rise, float into the seven hills above as they put their clothes out to dry on their rusty iron balconies. I hear those sounds and like magic, I can see Lisbon again. I am running towards the golden light and the familiar embrace of an old friend”. #DreamNowTravelLater #Visitportugal #Portugal #lisbonregion [Post shared on 5 February 2021]

Who doesn't like a pastel de nata in the morning?

Actually, you can enjoy this typical Portuguese pastry at any time of the day, especially if accompanied by a good espresso. Right now, it's not easy to go and buy a pastel de nata whenever you feel like it, but the good news is that you can recreate this recipe in the comfort of your home . . . and delight the whole family: <http://bit.ly/39nyPKA>.

Give it a try and share the photos of your masterpiece with us 😊

#FoodandWine #LisbonRegion [Post shared on 24 February 2021]

The second reopening phase (May 2021–May 2023) permitted the re-stabilization and long-term recovery of international tourism. During this period, Visit Portugal utilized rebuilding response strategies to inform the public about the low risk of traveling and to provide clear information on the reopening rules in place. Additionally, secondary response strategies were implemented to welcome back tourists and aid in the recovery from the crisis, emphasizing the destination's safety and readiness. Some examples of these posts include the following:

If you're planning to travel or to move safely this year, the EU Digital Covid Certificate is a must-have tool.

Follow our tips and get all the necessary information to request yours 😊

Happy travels! [Post shared on 12 July 2021]

After an open call to shapers worldwide to create a surfboard made from COVID-19 waste, this is the final result and closure everyone's been looking for: 8 surf-boards chosen by a prestigious jury.

Come and see them at MEO Vissla Pro Ericeira from 2–10 October 2021.

More information: <https://unwantedshapes.pt> [Post shared on 1 October 2021]

Today we celebrate World Tourism Day 2022 and the theme for this year is “Rethinking Tourism”. Now more than ever, this is the time to redress the balance. Tomorrow is today. Let’s change today so we can guarantee tomorrow. For a better planet, a better tourism.  
#WorldTourismDay [Post shared on 27 September 2022]

DMOs strive to improve their destination’s image while simultaneously managing and mitigating the impact of negative coverage, including actual crisis situations like virus outbreaks (Che, 2008). In this context, Visit Portugal took a step further by integrating sustainability into their strategic response to the pandemic. As explained by the Communication and Digital Marketing Director, the goal of this transition was as follows:

*From now on, we have a brand purpose which is to welcome everyone, but we think that is no longer enough. From now on we are sustainability. And this new condition will be dimmed in all of our campaigns.*

Starting from late 2022 and beyond, sustainability has evolved from being merely a buzzword into a comprehensive strategy deeply ingrained within Visit Portugal’s organizational structure, as described in the Portugal Tourism Plan +Sustainable 20–23 (Casal-Ribeiro & Boavida-Portugal, 2024). This core principle was integrated across all aspects of their communication efforts. Non-COVID-19-related content shared on Facebook include new campaigns as the #SaveOurOcean, the #Rout\_E to promote the use of electric or hybrid vehicles for press trips and tourists, or the #PortugalFieldGuide, a campaign that shared regular content that highlighted endangered local species of fauna and flora, raising awareness about environmental conservation. By implementing a multifaceted communication strategy that addressed both short-term recovery needs and long-term sustainability goals, the DMO ensured that the destination remained appealing and resilient during the prolonged low-responsibility crisis and reinforced an online sustainable image. Figure 6 displays the main hashtags used in the analyzed crisis communication posts. Among these, #CantSkipHope stands out as the most frequently used hashtag (24 percent) and a key element in the crisis communication strategy, with relevant significance in the overall messaging, as the DMO had used the hashtag #CantSkipPortugal in their posts before the crisis. In addition, other hashtags were created to tag specific COVID-19 response content,



**Table 8.** Engagement metrics.

	Crisis Communication on Facebook					
	Primary Response Strategies (n = 15)			Secondary Response Strategies (n = 43)		
	ni	M	SD	ni	M	SD
Likes/Reactions	15	188.27	211.2	43	249.19	394.19
Shares	9	80.33	224.10	30	176.84	601.89
Comments	13	15.40	27.8	42	14.67	28.34

#### **4. Discussion and conclusions**

##### *4.1. Overview*

The current study was designed in a threefold way to understand Visit Portugal’s online crisis communication decision-making process during the COVID-19 pandemic, examine the crisis communication content shared on Facebook to mitigate the pandemic’s impact and safeguard the destination’s image, as well as to evaluate which type of crisis response strategies resulted in higher audience engagement. This study contributes to the growing body of research on crisis communication by DMOs during low-responsibility crises, particularly in the context of the COVID-19 pandemic.

RQ1: How does a DMO outline its crisis communication decision-making process on social media during a prolonged low-responsibility crisis?

The findings of this study align with previous literature highlighting the role of DMOs in managing and coordinating crisis communication (Dredge, 2016; Pike, 2006). However, this study provides novel insights into the internal decision-making processes and the operationalization of social media strategies during an extended crisis.

One of the most significant contributions of this research is the detailed examination of how a DMO structured its crisis communication framework during an extended crisis, by establishing a dedicated committee. The selection of key officials with expertise in communication, marketing, and decision-making authority underscores the necessity of an agile and knowledgeable crisis response team (Pennington-Gray et al., 2009). The committee’s capacity to integrate pre-existing crisis management documentation, originally designed for wildfire events, shows the importance of organizational adaptability and pre-crisis preparedness (Coombs, 2010). This supports prior studies that highlight the value of

leveraging past crisis management experiences to respond to novel threats (Sellnow & Seeger, 2013).

Furthermore, this research underscores the critical role of top-down communication strategies in ensuring message consistency and credibility. The necessity for close collaboration with official institutions, such as the Portuguese Health Authority and the Council of Ministers, illustrates the reliance on authoritative sources to enhance public trust and information accuracy (Barbe & Pennington-Gray, 2020). This study supports previous evidence that crisis communication must prioritize public safety, while simultaneously mitigating stakeholder harm (Coombs, 2019). This supports the argument that crisis communication must extend beyond the mere dissemination of information to include reassurance and engagement of key audiences (Corrêa et al., 2024; Lehto et al., 2008).

RQ2: How can a DMO use social media to safeguard the destination's image during a prolonged low-responsibility crisis?

Different crisis communication strategies were employed throughout the pandemic, with a notable emphasis on secondary response strategies (bolstering and enhancing) to safeguard public image and to lead to higher audience engagement. Through effective crisis communication, Visit Portugal managed to maintain its public image and audience engagement. These strategies were essential to Visit Portugal's communication, as evidenced by the examples presented in the previous section. Bolstering response strategies were used to reinforce the destination's reputation by portraying Portugal as a victim of the crisis and promoting messages of hope and unity (Coombs, 2007), as seen in campaigns like #CantSkipHope and #CantSkipOpening. In parallel, enhancing response strategies, which aimed to not only maintain but also improve the image, were evident in campaigns such as #Tupodes, which encouraged patriotism and the rediscovery of the country by locals, and the collaborative "Unwanted Shape" campaign, which accentuated sustainability as a key value in the recovery process. These findings corroborate findings from previous studies that emphasize the critical role of crisis marketing communication campaigns in the recovery of destination image (Ketter & Avraham, 2021; Mair et al., 2016), further demonstrating their strategic importance in tourism crisis management. The findings highlight the crucial role of strategic crisis communication in mitigating the negative impacts of prolonged crises (Claeys & Cauberghe, 2012; Coombs, 2007; Veil et al., 2011), emphasizing the importance of responsive and adaptive communication practices. Bolstering strategies helped maintain the

destination's image by highlighting positive aspects and the hope for a better future, while enhancing strategies were crucial in reinforcing Portugal's position as a safe and attractive destination for tourists, especially as the situation began to stabilize. As stated by the Visit Portugal's Communication and Digital Marketing Director during the interview:

*Our concern over these two years was clear and transparent communication and trying to share as much information about what was the situation throughout the different stages of the pandemic.*

These communication practices not only protected Portugal's image during COVID-19 but also helped to enhance it, particularly by successfully integrating sustainability as a key pillar in its long-term image recovery. The shift towards a more sustainability-centered communication approach, seen in posts like #SaveOurOceaon or #Route\_E, aligned with emerging post-pandemic marketing communication paradigms, placing sustainability at the forefront of tourism marketing and the destination's identity. Thus, this study contributes to the research agenda on the emerging post-pandemic marketing communication model, highlighting the increasing significance of sustainability in crisis communication strategies and its potential to reshape destination management practices in future crises (Pascual-Fraile et al., 2024).

Moreover, the findings of this study align with broader literature on crisis management in tourism, which emphasizes the importance of proactive planning, reactive measures, and adaptive strategies to foster resilience and adapt to unpredictable events, such as low-responsibility crises (Månsson & Eksell, 2024; Casal-Ribeiro et al., 2023; Raki et al., 2021). Specifically, this study expands the understanding of how secondary response strategies can be effectively applied not only to react to prolonged adversity but also to reposition and strengthen the destination's image, creating a narrative that engages the audience.

RQ3: What type of crisis response strategy leads to a greater impact on audience engagement?

The findings indicate that secondary response strategies were more effective in fostering audience engagement compared to primary response strategies. Posts employing secondary response strategies generated a greater number of likes and shares, while both categories received an equal number of comments. Incorporating secondary response strategies, such as including messages of unity, past achievements, resilience during

COVID-19, or positive information about the destination, appears to engage more strongly with the audience (Coombs, 2007).

These findings suggest that audiences respond more positively to crisis communication incorporating secondary response strategies in low-responsibility crises, contributing to a deeper understanding of crisis communication in destination management contexts. Further details on these findings, along with their limitations and suggestions for future research, are discussed below.

#### *4.2. Theoretical Contribution*

This study contributes to the existing literature on tourism crisis communication by expanding on previous research and advancing theoretical understanding in several ways. First, it directly addresses the call for research on the production process of crisis communication implemented during crisis events (Mele et al., 2023; Ketter, 2016). By conducting, for the first time, an in-depth analysis of the DMO's formation of a crisis communication committee, its decision-making processes, and the strategic use of social media, this research provides a comprehensive understanding of how crisis communication strategies were developed and executed. This insight into the production process enriches the theoretical landscape of crisis communication within the context of extended, real-world crises. This aligns with recent findings that underscore the significance of structured crisis communication frameworks and stakeholder collaboration in enhancing destination resilience (Pascual-Fraile et al., 2024; García González et al., 2022).

Furthermore, Coombs (2021) has advocated for more advancements in crisis communication research, recommending testing the applicability and effectiveness of relevant theories, such as the SCCT, in the social media landscape. However, the SCCT has mainly been used to descriptively categorize crisis response strategies in tourism studies, without providing substantial causal evidence (Wut et al., 2021). This study makes a significant contribution to the theoretical discourse of the SCCT by providing empirical evidence on the effectiveness of crisis response strategies employed on Facebook during prolonged crises, such as the COVID-19 pandemic. The study's findings align with those of previous literature (Liu et al., 2015; Kim et al., 2011), demonstrating that secondary response strategies often generate superior results in engaging the audience and maintaining a positive destination image, particularly when the DMO's responsibility is perceived as minimal. By leveraging social media, DMOs can implement crisis response strategies effectively, not only providing real-time information

but also fostering a sense of community and resilience among their audience. This adaptability and responsiveness are crucial in the management of the destination's image and public engagement as the crisis evolves.

Lastly, criticism concerning single case study research often concerns the constraints associated with generalizing findings and establishing statistical conclusion validity (Yin, 2014; Horn & Heerboth, 1982). To address these limitations, this study employed an exploratory sequential approach, integrating qualitative and quantitative analyses to strengthen the robustness and the validity of the study results (Heesen et al., 2019). This methodological framework provides a more comprehensive understanding of crisis communication strategies, offering significant theoretical and practical implications.

#### *4.3. Managerial Contribution*

From a managerial perspective, this study offers valuable insights into DMOs and other tourism stakeholders involved in crisis communication. The findings underscore the importance for DMOs to adopt a structured and strategic crisis communication workflow to ensure both efficiency and credibility in crisis responses. One of the key managerial implications is the establishment of a dedicated crisis communication committee. The study's findings indicate that the presence of a committee, comprising members with both technical expertise and decision-making authority, is essential for facilitating a well-coordinated and effective response. Research supports this approach, indicating that well-structured crisis management teams have the capacity to expedite real-time decision-making, while ensuring that communication remains aligned with the evolving nature of crises and align with official stakeholder requirements (Barbe & Pennington-Gray, 2020). Additionally, the implementation of a top-down communication approach allows upper-level management to efficiently allocate resources and prioritize communication efforts based on the severity and extent of the crisis (Department of Tourism, Innovation and Sport, 2019). This top-down approach has been shown to facilitate streamlined decision-making and rapid implementation of communication strategies, ensuring consistent messaging and the prevention of misinformation, thereby reinforcing stakeholder trust (Barbe & Pennington-Gray, 2020). Such consistency in communicating is crucial, as research shows that stakeholder trust is heavily dependent on the perceived reliability of the information provided by DMOs during a crisis (Barbe & Pennington-Gray, 2020).

Furthermore, DMOs should prioritize the development of crisis communication plans that integrate secondary response strategies to effectively manage future low-responsibility crises. Empirical findings demonstrate that during low-responsibility crises, secondary response strategies are more effective in maintaining a positive destination image and fostering audience interaction. Therefore, DMOs and other tourism organizations should proactively develop pre-crisis response frameworks that incorporate these strategies to increase preparedness and ensure smooth implementation in times of crisis.

Regular training of staff on crisis communication best practices, particularly in message framing and social media engagement, has been demonstrated to significantly improve crisis response effectiveness. Given the increasing role of social media as a primary communication channel, especially in health-related crises, DMOs may also invest in advanced digital tools for crisis communication and analysis of real-time insights into public perceptions.

Furthermore, collaboration with relevant external stakeholders, including governmental agencies and private sector partners, is important for a holistic and comprehensive crisis response. The establishment of predefined communication protocols with key stakeholders safeguards the effectiveness of crisis response efforts. Research consistently demonstrates that inter-organizational coordination enhances crisis management efficiency by mitigating inconsistencies that could otherwise undermine public trust (Ritchie & Jiang, 2019). These protocols ensure that messages are aligned across different organizations, ultimately reinforcing the destination's resilience.

#### *4.4. Limitation and Further Research*

While this study provides valuable insights into tourism crisis communication research, it is not without limitations. First, the study focused on a single case study of the destination Portugal and analyzed content shared exclusively via Facebook. This limits the generalizability of the findings. Future studies should consider a broader comparative analysis across multiple DMOs or other tourism organizations in different countries and regions to assess how cultural and political factors shape crisis communication. Additionally, investigating a wider range of social media platforms (e.g., Instagram and TikTok) could offer a deeper understanding of platform-specific engagement dynamics and the effectiveness of messages. Moreover, examining different prolonged low-responsibility crisis scenarios (e.g., climate change) could

provide valuable insights into how DMOs adapt their strategies to different crises. Such research could provide a more holistic understanding of effective crisis communication practices across diverse geographical contexts and in different low-responsibility crises. Second, while the study highlights the efficacy of secondary response strategies during low-responsibility crises, future studies may examine the varying effectiveness between bolstering and enhancing response strategies and attempt to measure their impact on tourists' behavioral intentions, particularly future visitation and recommendation. Methodologically, experimental designs or longitudinal studies could provide a deeper understanding of how these strategies influence tourists' behavioral intentions and destination recovery over time. This would provide deeper insights into the optimal application of these strategies and their influence on destination choice and tourism recovery during prolonged low-responsibility crises.

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# Chapter 5 –National-level strategic recovery: context for Lisbon’s long-term recovery

This chapter offers an in-depth analysis of how the COVID-19 pandemic disrupted Portugal’s tourism industry, and how the country responded through strategic recovery and sustainability-oriented measures. While the focus is on the national level, this macro-level analysis provides essential contextual grounding for the case study of Lisbon developed in this doctoral research. It informs the understanding of broader policy responses and industry-wide adaptations that influenced local dynamics. The chapter is particularly aligned with SO5, SO6, and SO7, as it examines the immediate impacts of the COVID-19 pandemic, the strategic and adaptive recovery measures implemented in Portugal, and the key lessons learned to enhance destination resilience—providing essential context for understanding how these dynamics unfolded at the local level in Lisbon. Due to publication requirements, the following book chapter constitutes one of two sections of the doctoral research to be presented in Portuguese.

## 5.1. Publication IV – Recuperação pós-COVID e adoção de práticas mais sustentáveis na atividade turística em Portugal

*The material presented in this section has been published as a book chapter in a scientific book, El Turismo poscovid en iberoamérica: ¿recuperacion y/o transformación?:*

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# RECUPERAÇÃO PÓS-COVID E ADOÇÃO DE PRÁTICAS MAIS SUSTENTÁVEIS NA ATIVIDADE TURÍSTICA EM PORTUGAL

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## KEYWORDS

COVID-19; turismo; recuperação, sustentabilidade, Portugal

## 1. Introdução

A pandemia da COVID-19 provocou uma crise sem precedentes na indústria turística (Žižek, 2020), expondo a sua vulnerabilidade a crises globais (Sigala, 2020). O vírus causou uma profunda disrupção na indústria à escala global, com consequências socioeconómicas significativas, como fecho de fronteiras, restrições de viagens, confinamentos obrigatórios, layoffs e encerramento de diversas empresas (António, Rita e Sarraiva, 2021; Jamal e Budke, 2020). O impacto na indústria turística foi mais duradouro e complexo do que em crises anteriores (Zenker e Kock, 2020), exigindo estratégias de contenção mais rigorosas devido à sua escala global, longa duração, incerteza e capacidade de mutação viral (Sigala, 2020). A crise da COVID-19 vem reforçar o debate sobre a vulnerabilidade da indústria a diferentes riscos ambientais, políticos e socioeconómicos (Novelli, Gussing Burgess, Jones e Ritchie, 2018). O turismo não é apenas um produto, mas também um agente influente na sociedade globalizada, nas políticas governamentais, na predominância de princípios capitalistas no desenvolvimento económico de destinos turísticos, nas alterações climáticas e na produção de poluição e resíduos (Sigala, 2020). Assim, a própria essência do turismo, centrada num paradigma de crescimento constante, contribui significativamente para o aumento destes riscos e, especificamente no caso da pandemia, potenciou a propagação global do vírus (Gössling, Scott e Hall, 2021).

Autores como Gössling et al. (2021) e Sharpley (2021) destacam a importância de o turismo se desenvolver de forma mais sustentável, como parte da recuperação e retoma da atividade pós-pandemia. Até porque se tem verificado um fracasso na implementação de políticas de desenvolvimento turístico sustentável nas últimas décadas (Buckley, 2012). A pandemia deve, portanto, ser vista como uma oportunidade para se reconsiderar criticamente a trajetória de crescimento do turismo (UNWTO, 2021) assente na premissa de que mais chegadas representam maiores benefícios (Gössling et al., 2021), numa tentativa de evolução rumo a uma indústria mais sustentável e resiliente (UNWTO, 2021). Este imperativo é particularmente relevante para destinos como Portugal, onde o turismo desempenha um papel estratégico fundamental no desenvolvimento económico do país. Nesse contexto, é crucial explorar a capacidade de adaptação do destino para informar modelos de desenvolvimento alternativos mais sustentáveis, alinhados com as condições e requisitos do sistema turístico pós-crise. Será que a reativação do turismo pós-COVID está a ser conduzida por uma estratégia nacional de turismo com foco na sustentabilidade e na implementação de práticas mais sustentáveis? Esta questão requer a análise de dados estatísticos referentes à evolução da atividade turística em Portugal durante a pandemia e a análise documental dos planos nacionais de turismo.

Este capítulo de livro encontra-se estruturado em três seções. A primeira seção analisa o impacto da pandemia na atividade turística de Portugal entre 2020 e 2023. A segunda seção avalia o efeito da pandemia no alinhamento de uma estratégia nacional de turismo comprometida com a sustentabilidade, materializada no Plano Turismo + Sustentável 20-23. Por sua vez, a terceira seção procura medir o sucesso de implementação das metas e práticas definidas no plano Turismo + Sustentável 20-23 implementadas ao longo do triénio.

## **2. Evolução da atividade turística durante a pandemia**

O setor do turismo tornou-se um dos sectores determinantes para Portugal, com um peso significativo na economia. Seguindo uma tendência de crescimento, o ano de 2019 registou valores históricos de procura turística, contabilizando-se 29,3 milhões de chegadas nos aeroportos, 27,1 milhões de hóspedes e 70,2 milhões de dormidas (Direção de Gestão do Conhecimento, 2022). A mesma tendência foi observada nas receitas geradas pelo turismo, atingindo 18,4 mil milhões de euros, um aumento de 8,1% em relação a 2018 (Turismo de Portugal, 2019). Durante os dois primeiros meses de 2020, todos os indicadores apontavam

para mais um ano de crescimento excepcional da indústria turística portuguesa, sugerindo a possibilidade de se estabelecerem novos recordes. Entre Janeiro e Fevereiro registaram-se 3,0 milhões de hóspedes (+13% face a 2019) e 7,1 milhões de dormidas (+11% face a 2019) (Direção de Gestão do Conhecimento, 2022). Estes resultados robustos refletiam a vitalidade do setor e a atração crescente de Portugal como destino turístico.

No entanto, o início de Março de 2020 ficou marcado pelo surgimento dos primeiros casos de COVID-19 em Portugal, à semelhança do sucedido na maioria dos países europeus. O cenário pandémico global sem precedentes veio provocar uma reviravolta drástica na tendência de crescimento. Os aeroportos portugueses registaram uma quebra de desembarques de 70% face a 2019, totalizando 8,8 milhões de chegadas de passageiros (Direção de Gestão do Conhecimento, 2021). Nos últimos meses de 2020, cerca de metade das unidades hoteleiras em Portugal encontravam-se temporariamente encerradas ou em operação com níveis mínimos de ocupação, como resultado das restrições sanitárias, medidas de confinamento e limitação de viagens (Direção de Gestão do Conhecimento, 2022). O impacto devastador da pandemia provocou uma forte contração no sector, contabilizando um total de 10,4 milhões de hóspedes (-61,6% face a 2019) e 25,8 milhões de dormidas (-63,2% face a 2019) em 2020. Estes valores resultaram em apenas 7,8 mil milhões de receitas geradas pelo turismo ao longo de todo o ano de 2020 (-57,6% face a 2019). A Área Metropolitana de Lisboa foi o destino que registou uma maior diminuição percentual, tanto a nível de hóspedes (-70,4% face a 2019) como de dormidas (-71,8% face a 2019) (Turismo de Portugal, 2020).

No primeiro trimestre de 2021 verificou-se um agravamento da situação epidemiológica em Portugal, atribuído em parte à flexibilização das medidas de contenção durante o período do Natal. Esse cenário originou o início da terceira e mais intensa vaga da pandemia, atingindo um recorde histórico de 12.891 novos casos a 27 de janeiro (INE, 2021). Em resposta, o governo implementou um novo confinamento geral de regime semelhante ao do início da pandemia para tentar controlar a situação. A reabertura do país a partir dos meses de verão e o processo da campanha de vacinação desencadearam uma reviravolta positiva para o sector turístico. Os aeroportos portugueses registaram a chegada de 12,5 milhões de passageiros em 2021 (+42,0% face a 2020), dos quais 74,8% provieram de aeroportos internacionais (Direção de Gestão do Conhecimento, 2022). No final, Portugal registou um total de 14,5 milhões de hóspedes (+38,6% face a 2020) e 37,3 milhões de dormidas (+44,7% face a 2020). As receitas totais geradas pelo turismo alcançaram os 10 mil milhões de euros,

correspondendo a uma quebra de 45% face aos valores de 2019. A Madeira e os Açores que, devido às suas características insulares determinantes obrigaram à implementação de medidas de combate à COVID-19 mais restritivas do que nas regiões continentais de Portugal, foram os destinos que registaram uma maior recuperação (Tabela 9). Em contexto continental, a Área Metropolitana de Lisboa foi o destino que registou uma maior recuperação a nível de hóspedes (+39,9% face a 2020) e de dormidas (+47,1% face a 2020) (Turismo de Portugal, 2021a). No final de 2021, apenas 36% das unidades hoteleiras ainda se encontravam temporariamente encerradas ou em operação com níveis mínimos de ocupação (Direção de Gestão do Conhecimento, 2022).

O ano de 2022 destacou uma significativa recuperação para o setor em Portugal. Com a redução dos casos de COVID-19 e a progressiva reabertura das fronteiras, o país testemunhou um aumento notável no número de turistas. Os aeroportos portugueses receberam 27,7 milhões de passageiros, dos quais 83% provenientes de aeroportos internacionais. O número de hóspedes ascendeu a 26,5 milhões de hóspedes (+83,4% face a 2021). Além disso, contabilizaram-se 69,7 milhões de dormidas, um crescimento impressionante de +86,7% face a 2021, aproximando-se assim dos níveis registados em 2019. As receitas turísticas totais geradas em 2022 chegaram aos 21,1 mil milhões de euros, mais 109,7% e mais 15,4% face aos períodos homólogos de 2021 e 2019, respetivamente (Turismo de Portugal, 2022a).

Prevê-se que 2023 seja um ano de total reanimação e recuperação do turismo em Portugal. De acordo com dados provisórios, até Agosto, os aeroportos portugueses registaram a chegada de 22,3 milhões, mais 12% face ao período homólogo de 2019. No que toca ao setor do alojamento o número de hóspedes ascendeu a 20,3 milhões (+10,3 face a 2019), somando-se 52,9 milhões de dormidas em território português (+8,9% face a 2019). As receitas turísticas geradas até Agosto rondam os 632,5 milhões de euros, mais 26,5% e mais 47,8% face aos períodos homólogos de 2022 e 2019, respetivamente (Turismo de Portugal, 2023a).

**Tabela 9.** Número de hóspedes e dormidas em Portugal (2019-2022).

<b>Número de Hóspedes (milhares)</b>				
<b>País/Regiões</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>
<b>Portugal</b>	27142,40	10430,60	14462,00	26519,70
Norte	5873,00	2469,90	3348,70	6045,50
Centro	4118,70	1884,00	2427,20	3900,70
A.M. Lisboa	8216,70	2433,20	3405,00	7656,60

Alentejo	1616,10	891,40	1121,80	1545,30
Algarve	5064,10	1991,80	2725,10	4766,20
R. A. Açores	771,70	238,30	501,20	825,00
R. A. Madeira	1482,20	522,00	933,10	1780,40
<b>Dormidas globais (milhares)</b>				
<b>Portugal</b>	70159,00	25798,30	37332,40	69694,80
Norte	10810,70	4366,10	6142,10	11556,60
Centro	7134,90	3362,00	4452,50	7117,70
A.M. Lisboa	18639,10	5254,40	7731,50	17983,70
Alentejo	2938,80	1829,30	2280,10	3035,40
Algarve	20900,50	7890,70	10874,00	19162,80
R. A. Açores	2277,80	654,40	1456,50	2458,00
R. A. Madeira	7457,20	2441,50	4395,80	8380,50

### 3. Estratégia turismo 2027 e o plano de recuperação turismo + sustentável 20-23

O Turismo de Portugal assume a função de autoridade turística nacional, com a responsabilidade de promover, valorizar e manter a sustentabilidade da indústria turística. Isso envolve a coordenação de todas as competências institucionais relacionadas à promoção do turismo, abrangendo tanto o desenvolvimento da oferta quanto a gestão da procura turística (Direção de Gestão do Conhecimento, 2022). Em 2017, o Turismo de Portugal tinha definido um novo quadro estratégico para o turismo no país a dez anos, denominado “Estratégia Turismo 2027” (Turismo de Portugal, 2017). A estratégia para o turismo 2027 assenta na premissa de consolidar Portugal como um dos destinos turísticos mais competitivos e sustentáveis do mundo, através do desenvolvimento económico, ambiental e social em todo o território. Para alcançar esse propósito, a Estratégia Turismo 2027 incorporou políticas setoriais concretas e estabeleceu metas específicas em cada um dos três pilares de sustentabilidade (Direção de Gestão do Conhecimento, 2022).

Diante do impacto devastador da pandemia na atividade turística nacional, foi crucial desenvolver um plano de recuperação para restaurar o setor ao nível de crescimento anterior à COVID-19 em alinhamento com a Estratégia Turismo 2027 e, ao mesmo tempo, capacitar o sector com ferramentas que promovessem um turismo mais sustentável, responsável e resiliente (Turismo de Portugal, 2023b). O plano de recuperação foi criado pelo Turismo de Portugal em articulação ativa com vários players do sector. Idealizado inicialmente pelo

Turismo de Portugal foi, numa segunda fase, promovida uma consulta pública com entidades públicas e players privados do sector. A consulta pública com diferentes players do sector contribuiu para melhorar e diversificar o documento final com a adição de 45 novas ações (Direção de Gestão do Conhecimento, 2022). Neste contexto, decorrente da estratégia nacional de retoma do turismo pós- COVID para o triénio 2020-2023, Portugal criou o plano Turismo + Sustentável 20-23 assente na premissa de:

*“posicionar Portugal como um dos destinos turísticos mais competitivos, seguros e sustentáveis do mundo através de um desenvolvimento económico, social e ambiental em todo o território.” (TravelBI, 2023).*

O plano inclui um total de 119 ações divididas entre 4 eixos-chave de atuação: (a) estruturação de uma oferta cada vez mais sustentável; (b) qualificação da capacitação dos profissionais do sector; (c) promoção internacional de Portugal como um destino sustentável; (d) monitorização contínua das métricas de sustentabilidade no sector” (Turismo de Portugal, 2021).

### *3.1. Estruturação de uma oferta mais sustentável*

O eixo da estruturação de uma oferta mais sustentável totaliza a prática de 80 ações com foco no reforço da eficiência ambiental da oferta, implementação de medidas de mitigação das alterações climáticas, economia circular, mobilidade sustentável, maior acessibilidade, valorização do património cultural e natural, reconhecimento do valor da oferta náutica e balnear, redução das desigualdades no sector e apoio à inovação no turismo (Turismo de Portugal, 2021b). A materialização deste eixo tem vindo a ganhar forma através de uma série de medidas e iniciativas inovadoras destinadas a promover a sustentabilidade dentro do setor de turismo. Um dos passos fundamentais tem sido a implementação bem-sucedida do programa Transformar Turismo, que visa a transformação sustentável, positiva e inteligente do património turístico, enfatizando a importância dos benefícios sociais tangíveis e de um impacto ambiental positivo (Turismo de Portugal, 2022b). Além disso, foi desenvolvida a plataforma T+, uma ferramenta de diagnóstico de sustentabilidade que permite a avaliação detalhada das práticas operacionais de pequenas e médias empresas do setor. Esta plataforma permite ainda disponibilizar informações relevantes, promovendo informações de melhoria contínua. Empenhado com a promoção da sustentabilidade, o Turismo de Portugal tem

fornecido guias de boas práticas diretamente nas suas plataformas, auxiliando empresas e profissionais do sector a adotarem medidas mais responsáveis nas operações diárias. Já uma das iniciativas mais proeminentes é a certificação de eficiência hídrica destinada a empreendimentos turísticos, que é realizada através do sistema AQUA + HOTÉIS. Esta certificação destaca e recompensa as empresas que apresentam um compromisso sólido em relação à preservação da água enquanto recurso natural e que recompensa aquelas que atingem padrões exemplares de eficiência hídrica (Direção de Gestão do Conhecimento, 2022). Todas estas ações combinadas exemplificam o esforço contínuo e diversificado para fortalecer a sustentabilidade e responsabilidade no turismo.

### *3.2. Qualificação da capacitação dos profissionais do sector*

O aprimoramento da capacitação dos profissionais do sector envolve a execução de 17 ações centradas na qualificação para a sustentabilidade (Turismo de Portugal, 2021b). Criado em Novembro de 2020, o programa de formação “Upgrade” foi desenvolvido para profissionais da indústria hoteleira e da restauração com o propósito de fomentar uma cultura de valor acrescentado através da incorporação de medidas e práticas sustentáveis, incluindo o uso eficiente de água e energia (Direção de Gestão do Conhecimento, 2022). Já em 2021, foi lançado o programa Empresas Turismo 360 graus com o intuito de posicionar as empresas como peça central no processo de transformação do sector, desafiando as empresas a reavaliar as suas estratégias e operações e a alinharem-se com práticas de governança ambiental, social e corporativa (ESG). Isto envolve uma série de iniciativas estratégicas que se concentram em perceber, medir e identificar o comportamento socialmente responsável das empresas envolvidas no setor. Além disso, o programa visa promover modelos de negócio rentáveis, que se baseiam em produtos e serviços inovadores e que sejam capazes de gerar benefícios sociais consistentes e reduzir o impacto ambiental. Por meio de ações colaborativas em grande escala, o programa Empresas Turismo 360 graus propõe unir as várias partes da cadeia de valor do turismo, impulsionando o desenvolvimento sustentável. A incorporação de práticas ESG pelas empresas é também um componente fundamental do programa, contribuindo para melhorar a competitividade, estimular o crescimento económico inclusivo e fomentar a criação de emprego, resultando em benefícios socioeconómicos significativos para o setor como um todo (Direção de Gestão do Conhecimento, 2022). Paralelamente às iniciativas anteriormente mencionadas, estão a ser realizadas diversas ações destinadas a melhorar a qualificação do sector em questões de

sustentabilidade a diferentes níveis de formação. Estas incluem o desenvolvimento de unidades curriculares específicas sobre turismo sustentável e gestão sustentável de destinos, com foco na formação de jovens alunos, bem como a fundação de um programa de responsabilidade social e ambiental em cada escola profissional de hotelaria e turismo (EHT), com a nomeação de um embaixador por escola para liderar essas iniciativas. Outros programas de visibilidade incluem o Programa BEST que promove boas práticas de sustentabilidade e a formação em “Situações de Risco de Incêndio - Autoproteção e Segurança” para garantir a segurança tanto de visitantes e turistas como das comunidades locais. A fim de reforçar o compromisso com a sustentabilidade, a Carta Compromisso Colaborador + Sustentável, é outra iniciativa do Turismo de Portugal que compromete tanto colaboradores quanto empresas a adotarem práticas mais responsáveis e amigas do ambiente. Todas estas ações coletivas estão a contribuir para elevar os padrões de qualidade e sustentabilidade no turismo, promovidas através da capacitação dos profissionais de turismo em Portugal (Direção de Gestão do Conhecimento, 2022).

### *3.3. Promoção internacional de Portugal como um destino sustentável*

O eixo centrado na promoção internacional como destino turístico contempla 13 ações voltadas para fortalecer a imagem de Portugal como um destino comprometido com a sustentabilidade, expandir a procura turística por todo o território ao longo de todas as épocas do ano e fomentar um turismo responsável (Turismo de Portugal, 2021b). A concretização deste eixo ocorre por meio da criação e lançamento de diversas campanhas de promoção internacional. Logo em 2020 foi promovido o projeto “The unwanted shapes” com o objetivo de conscientizar a sociedade sobre a luta contra a poluição dos oceanos causada pelo lixo de plásticos provenientes da pandemia e incentivar o público a apresentar projetos de pranchas de surf feitas a partir dos resíduos gerados pela pandemia. Visando a preservação do capital natural enquanto essência da identidade patrimonial portuguesa, no início de 2021 foi lançada a campanha “Tomorrow is Today” (Direção de Gestão do Conhecimento, 2022). A campanha “Rout-e” veio convidar os turistas a explorarem Portugal através de motos elétricas, promovendo uma mobilidade sustentável e ecologicamente responsável enquanto percorrem diferentes regiões do país. A campanha “SketchTour Portugal Reload” pretende fomentar a promoção do turismo literário de forma sustentável, incentivando os turistas a prolongar a suas estadias no território para reduzir a pegada ecológica, e maximizar o impacto local. Paralelamente, encontra-se em execução a campanha “Portuguese Field

Guide”, uma iniciativa de comunicação destinada a promover a proteção e conservação da fauna e flora em risco de extinção em Portugal. Esta campanha enfatiza os ecossistemas e as suas espécies únicas como elementos centrais na narrativa do destino Portugal, destacando a biodiversidade do país e incentivando a sua preservação (Direção de Gestão do Conhecimento, 2022).

#### *3.4. Monitorização das métricas de sustentabilidade no sector*

Por último, a monitorização das métricas de sustentabilidade no sector requer a implementação de 9 ações distintas com foco na análise do desempenho para promover a sustentabilidade, bem como na produção e partilha de conhecimento entre players (Turismo de Portugal, 2021b). A materialização deste eixo ocorre mediante a criação de observatórios regionais de turismo sustentável e disponibilização de indicadores de sustentabilidade dos destinos turísticos nacionais na plataforma TravelBI, plataforma de gestão do conhecimento do Turismo de Portugal. Globalmente, o plano de recuperação Turismo + Sustentável 20-23 fortalece o alinhamento da política nacional de turismo com a Agenda 2030 para as metas dos objetivos de desenvolvimento sustentável (ODS) definidos pela Assembleia Geral das Nações Unidas. A implementação das 119 ações definidas no plano de recuperação contribuem ativamente para: garantir a disponibilidade e gestão sustentável de água potável e saneamento para todos (ODS 6); garantir o acesso confiável, sustentável, moderno e a preço acessível a energia para todos (ODS 7); promover um crescimento económico inclusivo e sustentável, o emprego e produtivo e, o trabalho digno para todos (ODS 8); construir infraestruturas resilientes, promover a industrialização inclusiva e sustentável e fomentar a inovação (ODS 9); assegurar padrões de consumo e de produção sustentáveis (ODS 12); proteger, reparar e promover o uso sustentável dos ecossistemas terrestres, gerir de forma sustentável as florestas, combater a desertificação, deter e reverter a degradação dos solos e travar a perda de biodiversidade (ODS 15); promover sociedades pacíficas e inclusivas para o desenvolvimento sustentável, proporcionar o acesso à justiça para todos e construir instituições eficazes, responsáveis e inclusivas a todos os níveis (ODS 16) e, reforçar os meios de implementação e revitalizar a parceria global para o desenvolvimento sustentável (ODS 17) (Direção de Gestão do Conhecimento, 2022).

#### **4. Metas de sustentabilidade do plano de recuperação a atingir até 2023**

Da elaboração do plano Turismo + Sustentável 20-23, foram estabelecidas uma série de metas a serem alcançadas até ao final de 2023. Abordando questões relacionadas à conservação do meio ambiente, responsabilidade social e desenvolvimento económico sustentável, as metas estabelecidas são (TravelBI, 2023):

- Implementar sistemas de eficiência energética, hídrica e controlo de resíduos em 75% dos empreendimentos turísticos em Portugal;
- Eliminar o uso de plásticos de uso único em 75% dos empreendimentos turísticos em Portugal;
- Certificar 25.000 empresas com o Selo Clean & Safe e 30.000 profissionais com a formação associada e,
- Formar 50.000 profissionais na área de sustentabilidade.

O sector da acomodação e hotelaria é responsável por 21% da pegada global de consumo de energia e emissão de dióxido de carbono produzidos pelo turismo (Gössling e Peeters, 2015). Tendo em conta as metas de sustentabilidade acima definidas, os dados recentes do Turismo de Portugal revelam que 66% dos empreendimentos turísticos já implementaram sistemas de eficiência energética em 2022. No entanto, é relevante notar que a eficiência energética dos hotéis tem crescido de forma proporcional ao número de estrelas, alcançando um índice de 74% nos estabelecimentos de cinco estrelas. Medidas de utilização de lâmpadas economizadoras, sistemas de climatização de intensidade controlada pelo hóspede, equipamentos desligados quando não utilizados, isolamento térmico e acústico de caixilharias representam as boas práticas mais adotadas (Direção de Gestão do Conhecimento, 2023).

Em média, a taxa de consumo de água varia de 84 a 3.423 litros por quarto por dia (Gössling, Peeters, Hall, Ceron, Dubois, Lehmann e Scott, 2012). No entanto, estima-se que através da implementação de equipamentos eficientes, os hotéis poderão baixar o consumo de água interior em aproximadamente 30% (Cooley, Hutchins-Cabibi, Cohen, Gleick e Heberger, 2007). Em termos de eficiência hídrica, 68% dos empreendimentos turísticos implementaram medidas de poupança de água em 2022. Também a eficiência hídrica dos hotéis tem crescido de forma proporcional ao número de estrelas, chegando a 76% nos estabelecimentos de cinco estrelas. Entre as melhores práticas mais comuns destacam-se a

substituição de toalhas e lençóis de acordo com o mínimo estipulado por regulamentação ou mediante solicitação dos hóspedes e a utilização de sistemas de descarga eficientes com opção de cargas diferenciadas de água. Em contrapartida, menos de 38% dos estabelecimentos implementaram práticas de eficiência hídrica complementares como instalação de dispositivos de temporização nas torneiras e reaproveitamento de águas pluviais para fins de rega (Direção de Gestão do Conhecimento, 2023).

Globalmente, os resíduos produzidos pela indústria turística constituem 37% a 72% de resíduos orgânicos, 6% a 40% de papel e cartão, 5% a 15% de plásticos e 3% a 14% de vidro (Pirani e Arafat, 2014). Em 2022, aproximadamente 63% dos empreendimentos turísticos implementaram práticas de gestão de resíduos, destacando-se a separação de resíduos para reciclagem e diminuição da utilização de embalagens na área da restauração, por exemplo, através da disponibilização de água da torneira em jarras ou garrafas reutilizáveis. O desperdício alimentar é considerado um dos grandes problemas ambientais da hotelaria sendo responsável por cerca de 10-42% do consumo de energia (Youngs, Nobis e Town, 1983), um gasto significativo de água (Gössling e Peeters, 2015) e 50% das emissões de dióxido de carbono (Dilkes-Hoffman, Lane, Grant, Pratt, Lant e Laycock, 2018). Aproximadamente um terço dos resíduos gerados em empreendimentos turísticos são resíduos orgânicos (Waste and Resources Action Programme, 2011). Contudo, a proporção de estabelecimentos que direccionam resíduos orgânicos para compostagem a nível nacional é inferior a 50%. Na categoria de hotéis, os empreendimentos turísticos classificados com quatro estrelas lideram a gestão de resíduos, com uma taxa de 65% (Direção de Gestão do Conhecimento, 2023).

Já os resíduos plásticos, devido ao facto de não serem biodegradáveis e à taxa de reciclagem limitada de cerca de 9%, são extremamente difíceis de eliminar causando impactos significativos no meio ambiente. Perto de 80% de todos os resíduos plásticos acabam em aterros sanitários (Geyer, Jambeck e Lavender Law, 2017). Além disso, os resíduos plásticos exercem impactos adversos na biodiversidade marinha e contribuem para a contaminação de alimentos e bebidas consumidos pelo homem (Barboza, Vethaak, Lavorante, Lundebye e Guilhermino, 2018). No que toca à meta de eliminação de plástico de uso único em 75% dos empreendimentos turísticos até 2023, aproximadamente 63% dos empreendimentos já não disponibilizaram plásticos descartáveis aos hóspedes em 2022. Plásticos de uso único como embalagens para acondicionar lençóis ou turcos após lavagem e bases de copos foram as mais fáceis de eliminar. Embalagens individuais de manteiga e condimentos similares

destacam-se como as mais problemáticas em termos de eliminação, com apenas 19% dos estabelecimentos conseguindo eliminá-las em 2022 (Direção de Gestão do Conhecimento, 2023).

Em 2020, o Turismo de Portugal lançou o selo Clean & Safe para certificar estabelecimentos e empresas turísticas que implementassem as orientações e protocolos de higiene e segurança recomendados pela Autoridade Turística Nacional e a Direção Geral de Saúde, a fim de reduzir os riscos de contaminação de COVID-19 (Turismo de Portugal, 2022c). Atualizado em 2022, a versão mais recente do selo preserva o foco na componente de higiene e segurança em situação de crises de saúde pública, adicionando uma nova componente de constrangimentos internacionais, fenómenos extremos e riscos coletivos (Turismo de Portugal, 2023c). À data de escrita deste capítulo o selo Clean & Safe fora atribuído a 22.277 empresas, correspondendo a cerca de 74% da meta definida no plano Turismo + Sustentável 20-23. Paralelamente, 44.000 profissionais já foram habilitados com a formação associada ao Selo Clean & Safe, superando a meta definida no plano (Turismo de Portugal, 2022c).

A nível de formação do capital humano para a sustentabilidade, o plano previa a habilitação de 50.000 profissionais na área. Os dados disponíveis revelam que só em 2021 foram realizadas 163 ações de formação na área da sustentabilidade, capacitando 8.650 profissionais (Direção de Gestão do Conhecimento, 2022).

O setor do turismo demonstra, assim, estar comprometido em alcançar as metas estabelecidas no plano Turismo + Sustentável 20-23 até ao final de 2023, através de uma colaboração sólida entre os intervenientes da cadeia de valor do turismo e os seus parceiros institucionais.

## **5. Conclusão**

A implementação da Estratégia Turismo 2027 como novo quadro estratégico de desenvolvimento turístico a 10 anos, marcou uma mudança significativa no enfoque estratégico do turismo nacional. Pela primeira vez, o turismo em Portugal comprometeu-se com um conjunto de medidas e metas que visam promover não só o crescimento económico, mas também o bem-estar social e a proteção ambiental. Essa mudança estratégica sinaliza um compromisso integral com práticas de turismo responsável e sustentável, abrangendo os três pilares da sustentabilidade.

A pandemia veio expor as fragilidades da indústria, evidenciando a necessidade de se efetuar modificações adaptativas significativas nos modelos de desenvolvimento e crescimento do turismo (Gössling et al., 2021). Isto envolve a consideração imperativa da integração de práticas voltadas para a segurança sanitária, resiliência e sustentabilidade. No caso específico de Portugal, a crise provocada pela COVID-19 atuou como um catalisador de aceleração do processo adaptativo de revisão do modelo de desenvolvimento estratégico do turismo, centrado fortemente nos três pilares da sustentabilidade. Esse processo resultou na criação do plano de recuperação Turismo + Sustentável 20-23, que se alinha eficazmente nas estratégias globais de desenvolvimento sustentável delineadas na Estratégia Turismo 2027.

À medida que as metas estabelecidas no plano de recuperação do Turismo + Sustentável 20-23 e na Estratégia Turismo 2027 continuam a ser alcançadas, torna-se evidente o grande compromisso e colaboração ativa entre os diversos players que compõem a cadeia de valor do turismo e os parceiros institucionais na concretização destas metas. Este espírito de cooperação demonstra não apenas a importância atribuída à sustentabilidade na recuperação da indústria do turismo em Portugal, mas também manifesta a determinação em promover práticas mais responsáveis e resilientes.

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# Chapter 6 – Lessons from Lisbon: crisis management during COVID-19

This chapter presents two key publications that emerged from the empirical component of this doctoral research. The first is a policy brief focusing specifically on Lisbon's short-term rental sector. The decision to develop a standalone publication for this segment was driven by the availability of a significantly expanded sample of survey data, which enabled an in-depth analysis of the level of preparedness, the immediate impacts, and the response measures implemented by this sector during the emergency phase of the COVID-19 pandemic. Due to publication requirements, the following policy brief constitutes the second and last section of this doctoral research to be presented in Portuguese. The second publication is a peer-reviewed journal article that synthesises the full longitudinal dataset from the doctoral investigation. It comprehensively addresses Lisbon's destination preparedness, emergency response, long-term recovery, and the critical learning processes among tourism stakeholders. In line with SO3 to SO7, and ultimately supporting SO8, the article integrates these insights to propose a novel conceptual crisis management framework specifically adapted to tourism destinations facing public health emergencies.

## 6.1. Publication V – COVID-19 e o arrendamento de curta duração: efeitos da pandemia na cidade de Lisboa

*The material presented in this section has been published as a policy brief by the Center of Geographical Studies:*

Casal-Ribeiro, M., & Boavida-Portugal, I. (2023). *COVID-19 e o arrendamento de curta duração: efeitos da pandemia na cidade de Lisboa* [Policy brief]. Centro de Estudos Geográficos. <https://doi.org/10.33787/CEG20230001>

# COVID-19 E O ARRENDAMENTO DE CURTA DURAÇÃO: EFEITOS DA PANDEMIA NA CIDADE DE LISBOA

Mariana Casal-Ribeiro, Inês Boavida-Portugal

## 1. Introdução

A pandemia COVID-19 causou um impacto global sem precedentes na indústria turística, onde viajar foi considerado uma atividade de alto risco (Zheng et al., 2021). Deste forma, este fenómeno complexo tem concedido uma oportunidade única de se investigar a resiliência de diferentes subsectores turísticos a fenómenos de crise e incerteza (Agustin et al., 2022). No que diz respeito ao subsector do arrendamento de curta duração (ACD) os impactos da COVID-19 são impressionantes, não só devido à natureza do trabalho em si, mas também devido ao acesso limitado a diferentes formas de apoio governamental (ATO, 2020). Em Portugal, a quebra do volume de faturação face a 2019 foi de 70-75% em 2020 e de 55-60% em 2021, notando que os centros urbanos de Lisboa e Porto foram os destinos mais afetados (ALEP, 2022).

Por sua vez, estima-se que a taxa de novas doenças infecciosas aumentará no Antropoceno dando lugar a novas pandemias num futuro próximo (Stephen, 2020), à medida que a hiper-mobilidade do turismo aumenta, se intensifica a concentração de áreas urbanas e se potencia a interconexão da economia global (Jiang, Ritchie & Benckendorff, 2017; Hall, 2010). Esta problemática requer uma análise crítica à forma como a pandemia foi gerida já que a gestão de crises é uma área essencial para se mitigar os impactos da pandemia, acelerar a recuperação e potenciar a preparação dos destinos a futuros surtos.

Este policy brief tem como objetivo disponibilizar à sociedade os resultados de um inquérito sobre os impactos da COVID-19 na oferta turística de ACD da cidade de Lisboa, com maior enfoque nos pequenos e médios proprietários. Visa também expor as estratégias de crise implementadas na operação, fornecendo orientações para o setor e os decisores políticos terem em conta na definição de novas ações de recuperação da pandemia a longo prazo e na prevenção de futuras crises sanitárias no destino.

O documento analisa três questões centrais. A primeira procura medir o nível de preparação do setor a fenómenos de crise e estimar os impactos da pandemia no negócio de ACD. A segunda questão de análise refere-se às estratégias de gestão de crise implementadas pelo setor para controlar a pandemia e estimular a recuperação turística.

Por último, a terceira questão pretende identificar os constrangimentos e desafios à recuperação a longo prazo do setor e retoma aos níveis pré-pandémicos. Os dados apresentados contribuem para a investigação sobre gestão de crises em turismo no contexto da COVID-19, fornecendo insights e apontando possíveis tendências futuras sobre como os proprietários-gerentes de ACD poderão adotar estratégias eficazes de controle de crise, uma vez que a indústria turística continua a não estar devidamente preparada para gerir e recuperar de crises e desastres naturais (Wang & Ritchie, 2012). O último segmento deste documento reúne algumas considerações para o setor.

## **2. Método de recolha dos dados e amostra**

O presente documento foi elaborado com base na recolha de dados primários e secundários com o objetivo de analisar o impacto da crise sanitária COVID-19 na oferta turística de ACD da cidade de Lisboa. Os dados primários foram recolhidos através de um questionário aplicado aos proprietários-gerentes de unidades de ACD na cidade de Lisboa, de forma a medir os impactos da pandemia COVID-19 na operação do negócio. O questionário aplicado possui objetivos de investigação mais alargados do que os apresentados neste policy brief, no âmbito do projeto de doutoramento em turismo financiado pela Fundação para a Ciência e a Tecnologia [Ref.2021.08066.BD]. Este documento trata os seguintes quatro blocos do questionário: (i) nível de preparação do setor de ACD a crises; (ii) impactos causados pela pandemia na operação; (iii) estratégias de gestão da pandemia desenvolvidas; (iv) desafios à recuperação nesta fase de recuperação a longo prazo.

O questionário foi divulgado por email a todos os proprietários-gerentes de ACD com email associado na base de dados do Registo Nacional de Alojamento Local (RNAL) do Turismo de Portugal. Este esteve disponível para ser respondido online, via Google Forms, entre o dia 03/05/2022 e o dia 31/06/2022.

Paralelamente, dados secundários referentes ao período de 2019, 2020, 2021 e 2022 foram extraídos do website Inside Airbnb. Estes dados foram analisados longitudinalmente de forma a identificar a concentração espacial da oferta ao longo da pandemia. A recolha dos dados primários acompanhou o início da época alta em Portugal, com o terceiro Estado de Alerta ainda decretado (Resolução do Conselho de Ministros n.º 41-A/2022).

Através dos meios descritos, foi possível recolher uma amostra não probabilística de 98 proprietários-gerentes de ACD que responderam ao inquérito, com as características que se descrevem na Tabela 10. A amostra não probabilística incide maioritariamente em pequenos proprietários individuais, em detrimento dos atores profissionalizados do setor.

**Tabela 10.** Caracterização da amostra do inquérito.

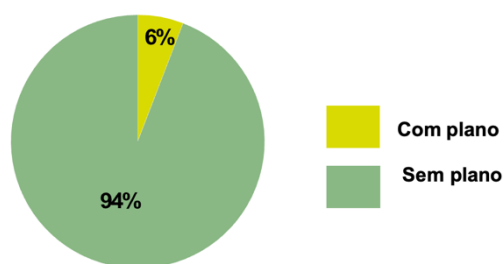
<b>Dimensão do negócio (número de unidades de ACD)</b>	<b>%</b>
1	43.9%
2 a 5	38.8%
6 a 9	7.1%
10 a 15	0%
16 a 20	3.1%
Mais de 20	7.1%

<b>Tipo de exploração</b>	<b>%</b>
<b>Próprio (trabalhador independente)</b>	36.7%
<b>Próprio (empresário em nome individual)</b>	16.3%
<b>Próprio (empresa)</b>	26.5%
<b>Terceiros (contrato de gestão)</b>	20.4%

### **3. Resultados do inquérito aos impactos no setor de arrendamento de curta duração**

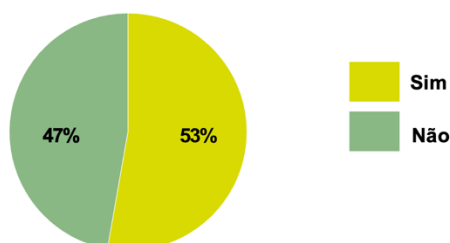
De um modo geral, o setor não se encontrava preparado para lidar com uma crise como o surto de COVID-19, visto que 94% dos inquiridos afirmarem não possuírem qualquer tipo de plano interno de atuação e gestão de crises antes da pandemia (Figura 7).

Os seis inquiridos que afirmaram ter algum tipo de plano interno de atuação em vigor, antes da pandemia, possuíam apenas planos de poupança para sobrevivência financeira em caso de ausência de faturação ou planos de atuação em situação de incêndio. Nenhum dos proprietários-gerentes inquiridos tinha implementado qualquer plano de contingência específico a crises sanitárias.



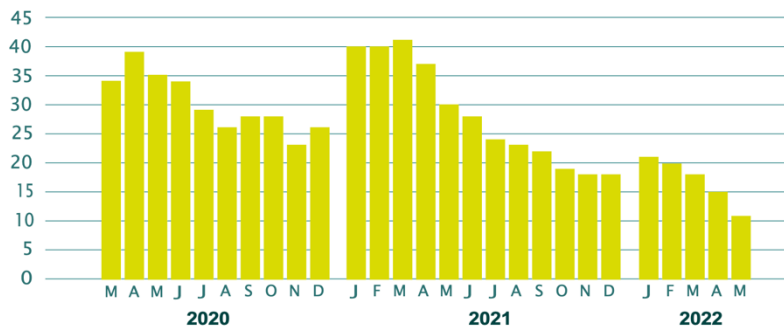
**Figura 7.** Inquiridos com e sem planos internos de gestão de crises implementados antes da pandemia.

Desde o início da pandemia, metade dos respondentes (53%) foram forçados a encerrar temporariamente as suas unidades ou a retirá-las dos canais de distribuição por consequência da ausência de procura durante os meses de pandemia (Figura 8).



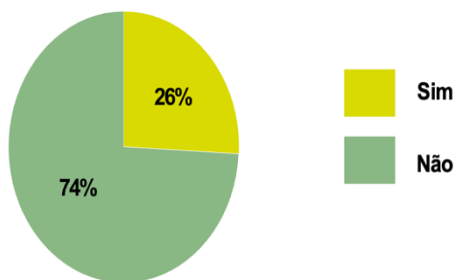
**Figura 8.** Resposta dos inquiridos à pergunta “Foi forçado a encerrar temporariamente as suas unidades ou a retirá-las dos canais de distribuição?”

Em 2020, esta ocorrência foi mais expressiva durante o primeiro confinamento, especificamente entre os meses de Março e Junho. Já no primeiro trimestre de 2021 registou-se o maior número de encerramentos temporários de unidades e retirada dos canais de distribuição desde o início da pandemia (Figura 9), período marcado pelo agravamento da situação epidemiológica decorrente do alívio das medidas no Natal (Decreto de Lei nº11/2020, de 6 de Dezembro; Decreto de Lei nº11-A/2020, de 21 de Dezembro) e entrada na terceira e mais acentuada vaga da pandemia, com um registo histórico de uma média diária de 12.891 novos casos, registados ao dia 27 de Janeiro (INE, 2021).

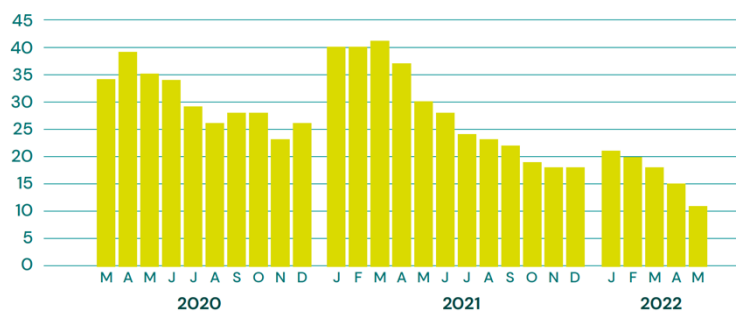


**Figura 9.** Distribuição mensal do número de encerramentos temporários e/ou retirada dos canais de distribuição (Março 2020 - Maio 2022).

Por sua vez, apenas  $\frac{1}{4}$  da amostra recorreu a layoff (Figura 10) com maior concentração entre Abril e Junho de 2020 e o primeiro semestre de 2021 (Figura 11). Esta ocorrência pode ser esclarecida pelo fato da amostra em estudo representar maioritariamente pequenos e médios empresários com uma presença ativa enquanto trabalhadores independentes ou empresários em nome individual na exploração dos seus negócios.

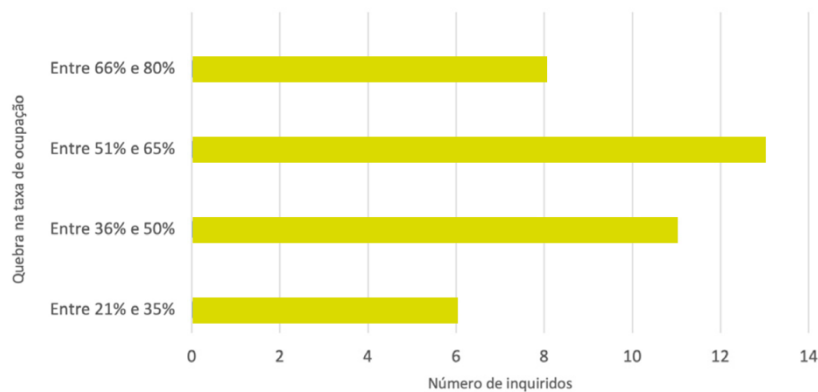


**Figura 10.** Resposta dos inquiridos à pergunta "Durante a pandemia recorreu a layoff?"



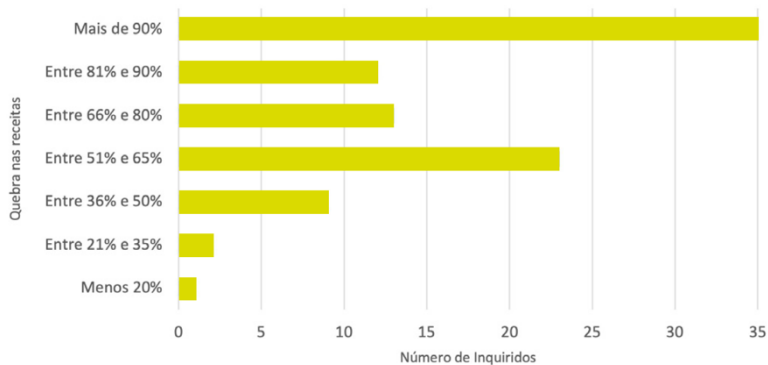
**Figura 11.** Distribuição mensal do número de inquirido que recorreu a layoff (Março 2020 – Maio 2022).

Outra consequência da COVID-19 no setor de ACD foi o impacto direto na taxa de ocupação e quebra das receitas geradas. Em 2020, 95% dos inquiridos registaram quebras percentuais significativas na taxa de ocupação face a 2019, dos quais 40% testemunharam quebras históricas superiores a 90% (Figura 12). Com a campanha de vacinação em vigor e o aliviar das medidas de controlo sanitário, o verão de 2021 caracterizou-se por uma ligeira recuperação da taxa de ocupação face ao período homólogo de 2020.



**Figura 12.** Número de inquiridos que registou quebra na taxa de ocupação em 2020.

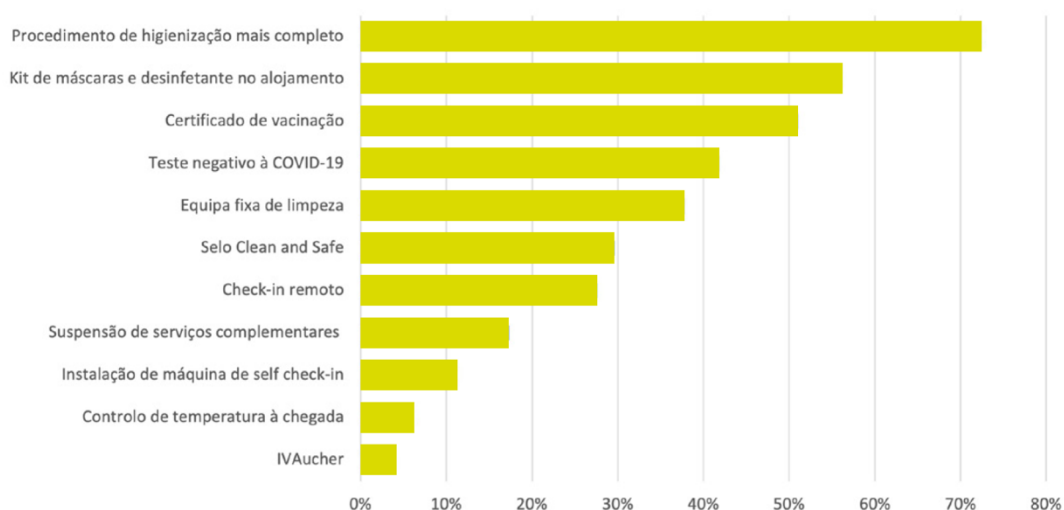
Em linha com os resultados anteriormente apresentados, 98% dos inquiridos também mencionaram terem sofrido elevadas quebras de receitas em 2020, maioritariamente entre 50% e mais de 90% (Figura 13).



**Figura 13.** Número de inquiridos que registou quebra nas receitas em 2020.

#### 4. Estratégias de gestão de crise adotadas pelo setor de ACD

O embate da pandemia obrigou a uma resposta concertada por parte do setor, numa tentativa de controlar os impactos da COVID-19 no negócio e reforçar a segurança da operação. De um modo transversal, os proprietários-gerentes implementaram procedimentos de higienização mais completos nas suas unidades (Figura 14).



**Figura 14.** Percentagem dos inquiridos que implementaram medidas de combate à COVID-19.

Metade dos respondentes (56%) passaram a incluir kits de máscaras e desinfetante nas unidades para promover a segurança dos seus hóspedes. A aposta em equipas fixas de limpeza com menor rotação de pessoal (37%) e a suspensão de serviços complementares (17%) foram outros procedimentos internos implementados, de forma a promover uma operação mais segura. Já o selo Clean & Safe, atribuído pelo Turismo de Portugal, foi requerido por 29% dos respondentes como garantia de que as suas unidades operavam em conformidade com os requisitos de segurança e limpeza oficiais para a prevenção e controlo da COVID-19.

Os proprietários-gerentes de ACD implementaram também novos procedimentos de controlo da pandemia na ótica do hóspede, com a requisição de teste negativo à COVID-19 no check-in (42%) e posterior solicitação do certificado de vacinação (51%) a partir do dia 9 de Julho de 2021 (Resolução do Conselho de Ministros nº91-A/2021).

Tendo em conta o panorama de crise e incerteza causado pela pandemia, uma pequena parcela dos proprietários-gerentes foi mais longe, implementando procedimentos tecnológicos inovadores. 28% dos respondentes criaram opções de realização de check-in remoto e 11% instalaram quiosques de self check-in de forma a diminuir o contacto interpessoal entre hóspedes e funcionários.

Em termos financeiros, 27% dos respondentes afirmam terem recorrido a linhas de financiamento e apoio para o turismo criadas pelo governo de forma a tentar assegurar a viabilidade financeira dos seus negócios durante a pandemia (Despacho Normativo nº

4/2020). O processo de financiamento em si foi classificado como um processo burocrático e de difícil acesso para os pequenos empresários.

Outro aspeto que merece menção nos resultados obtidos diz respeito às estratégias de marketing e revenue implementadas pelos proprietários-gerentes de ACD durante a pandemia. Para combater a incerteza da evolução da pandemia em Lisboa e estimular a procura, os respondentes flexibilizaram as suas políticas de cancelamento e alteração de reservas e reduziram os preços, especialmente durante a primeira, segunda e terceira vaga. Paralelamente, 26% dos respondentes desenvolveram novos pacotes promocionais e campanhas de marketing digital para aumentar a visibilidade e fomentar a procura após os períodos de confinamento (Figura 15).



**Figura 15.** Percentagem dos inquiridos que implementaram alterações no modelo de negócios entre 2020 e 2022.

## 5. Perspetivas de recuperação do setor de ACD a médio e longo prazo

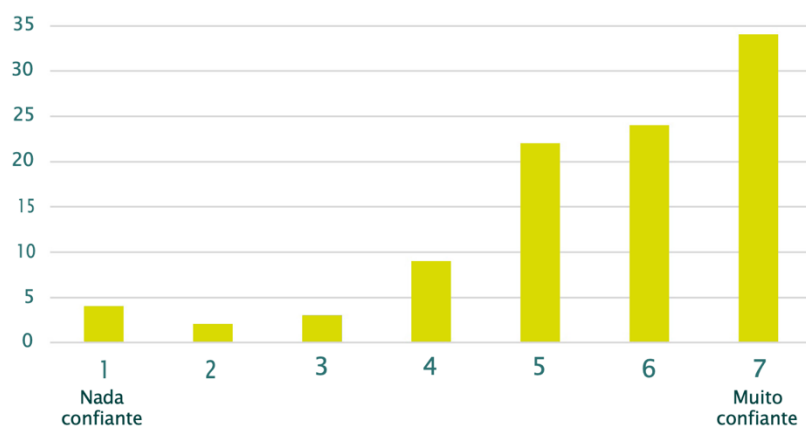
Quando inquiridos sobre quais as maiores dificuldades à recuperação do negócio durante a pandemia, os proprietários-gerentes identificaram um conjunto de desafios a dois momentos.

Numa primeira fase demarcada pela alteração sucessiva de períodos de confinamento e reabertura decorridos entre 2020 e 2021, as maiores dificuldades à estabilização da operação passaram pelo elevado cancelamento de reservas, a constante alteração das medidas decretadas pelo governo segundo a evolução epidemiológica no país, a grande

dificuldade de acesso a medidas de apoio financeiro e a capacidade de sobrevivência financeira.

Por sua vez, à data de realização deste inquérito os respondentes preparavam a retoma do verão de 2022 livre de medidas restritivas de deslocação, identificando um conjunto de novos desafios à recuperação da operação a longo prazo. A viabilidade financeira do negócio é agora identificada como o grande desafio à recuperação do setor, tendo em conta o estrangulamento financeiro provocado pela falta de procura, a carga fiscal sob o setor e a necessidade de amortização dos empréstimos contraídos. Já a inflação dos preços provocada pela carência de matérias-primas, uma consequência da forte restrição das economias imposta pela pandemia seguida da abertura dos mercados, e a subida dos preços da energia por consequência da guerra na Ucrânia, aumentam esta preocupação. Cerca de 20% dos proprietários-gerentes inquiridos identificam ainda o problema de falta de mão de obra qualificada para trabalhar decorrente da migração de profissionais para outros setores durante a pandemia. De forma não expressiva, dois inquiridos indicaram igualmente a recente decisão do supremo tribunal em considerar ilegal o exercício de atividade em frações destinadas à habitação e as contínuas regulações sobre o ACD como outras dificuldades à recuperação do negócio.

Não obstante das dificuldades à recuperação acima apresentadas, outra evidência que merece destaque nos resultados obtidos diz respeito aos níveis de confiança que os proprietários-gerentes inquiridos manifestam em relação à recuperação pós-COVID do turismo internacional até ao final de 2022. A recuperação do negócio dependerá da capacidade da indústria se adaptar ao cenário de modificação e incerteza de forma a mitigar os efeitos da pandemia (Supardi, Kudus, Hadi, & Indonesia, 2020), bem como do aumento da confiança dos turistas em viajar e da diminuição da perceção do risco associado (Assaf & Scuderi, 2020; Brito-Henriques et al., 2020). Este resultado é positivo e revela bons níveis de confiança a uma possível normalização do turismo internacional, registando uma pontuação média de 5,5 num máximo de 7 na escala de Likert (Figura 16).



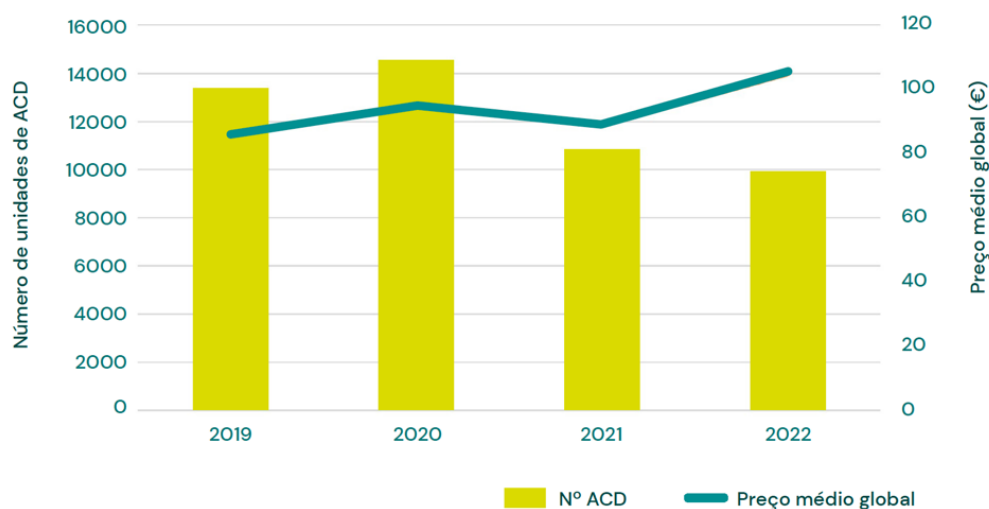
**Figura 16.** Resposta dos inquiridos à confiança da recuperação do turismo internacional até ao final de 2022 (Escala de Likert).

## 6. Análise de dados complementares

O tratamento e análise dos dados extraídos da plataforma Inside Airbnb corroboram os resultados anteriormente apresentados, permitindo quantificar a variação espaço-temporal do setor de ACD ao longo da pandemia.

A concentração de unidades de ACD seguia uma tendência evolutiva de crescimento até Março de 2020, momento em que foram identificados os primeiros casos de COVID-19 em Portugal. A Março de 2019, a cidade de Lisboa contabilizava um total de 13.383 unidades de ACD (Figura 17), das quais 10.561 apartamentos e 2.822 quartos, com maior concentração nas freguesias de Santa Maria Maior e Misericórdia (Figura 18), freguesias identificáveis como o centro histórico da cidade (Inside Airbnb, 2022). Em termos de preços, o setor praticava um preço médio global de 86,09€ a noite, 89,93€ por apartamento, 70,83€ por quarto privado e 23,88€ por quarto partilhado (Figura 17).

Fonte: Inside Airbnb.



**Figura 17.** Evolução do número de unidades em operação e do preço médio global em euros de ACD em Lisboa (2019-2022).

Já a Março de 2020 o setor registou um crescimento percentual anual global de 8,53% do número de unidades em operação, totalizando 14.524 unidades, das quais 11.335 apartamentos e 3.189 quartos. O preço médio global praticado era de 94,80€ a noite, 99,68€ por apartamento, 81,83€ por quarto privado e 21,98€ por quarto partilhado (Figura 17). A concentração de unidades de ACD no centro da cidade intensificou-se com as freguesias de Santa Maria Maior, Misericórdia e Arroios (Figura 18) a registar os valores mais altos. Um ano após o começo da pandemia em Portugal, os valores do setor de ACD espelham os impactos diretos da COVID-19 na operação turística. A Março de 2021, em pleno período de confinamento da segunda vaga, a tendência evolutiva do setor ficou demarcada por uma contração global de 25,49% registando-se apenas 10.822 unidades (Figura 17) em operação, 8.326 apartamentos e 2.493 quartos. O preço médio global sofreu uma contração de 6,08% baixando para 89,08€ a noite, 99,03€ por apartamento, 62,23€ por quarto privado e 29,90€ por quarto partilhado. Estes dados corroboram os resultados do inquérito realizado aos proprietários-gerentes onde parte da amostra expressou ter sido forçada a encerrar temporariamente os seus alojamentos devido à falta de procura e a diminuir os preços numa tentativa de estimulação da pouca procura à data.

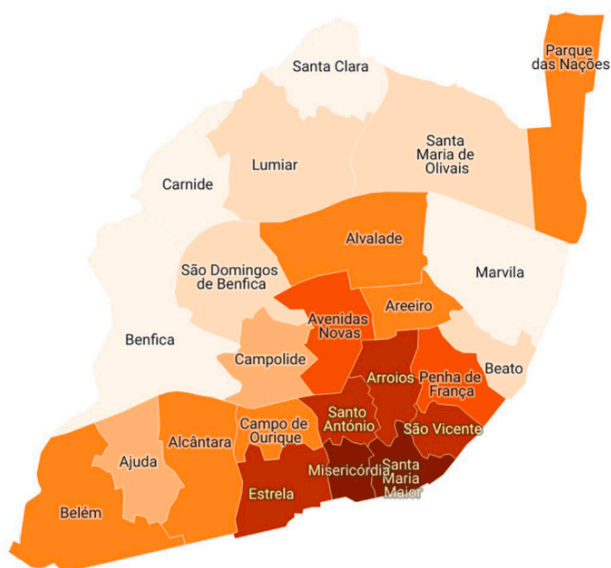
Em comparativo, a Março de 2022 a situação epidemiológica em Portugal passava para situação de alerta, o nível mais baixo de resposta a situações de catástrofes. Simultaneamente, 93% dos portugueses já se encontravam completamente vacinados contra a COVID-19 (Direção Geral de Saúde, 2022). Apesar desta estabilização da

pandemia e da retoma gradual da procura, o setor verificou uma contração global de 8,67%, registando-se um mínimo de 9.884 unidades em operação (Figura 17), 7.898 apartamentos e 1.986 quartos, com maior concentração na freguesia de Santa Maria Maior (Figura 18). Contrariamente, o preço médio global a noite verificou um aumento de 17,88% face a 2021, registando um novo valor máximo de 104,96€ a noite, 112,75€ por apartamento, 74,20€ por quarto privado e 69,40 € por quarto partilhado.

Esta situação espelha a sensibilidade do setor a situações de crise onde muito provavelmente, apesar do aumento da procura internacional com a estabilização da pandemia, o stress financeiro decorrente dos dois anos de pandemia veio colocar em causa a viabilidade financeira de várias unidades de ACD.

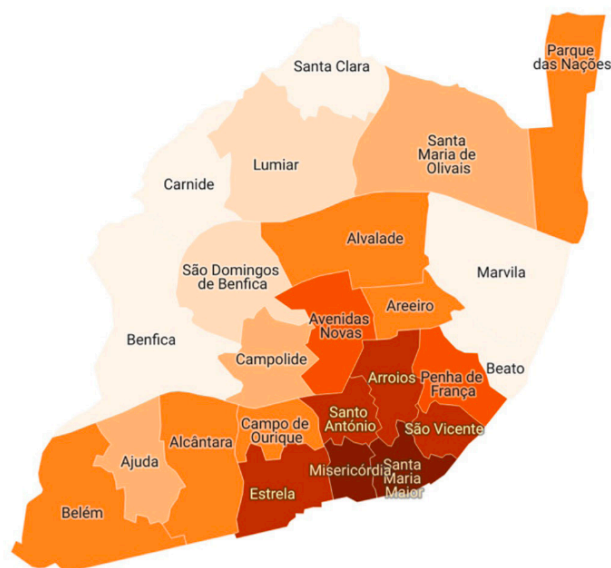
### 2019 (Março)

Nº Unidades de ACD  
< 75 75-115 115-175 175-345 345-755 755-2255 ≥ 2255



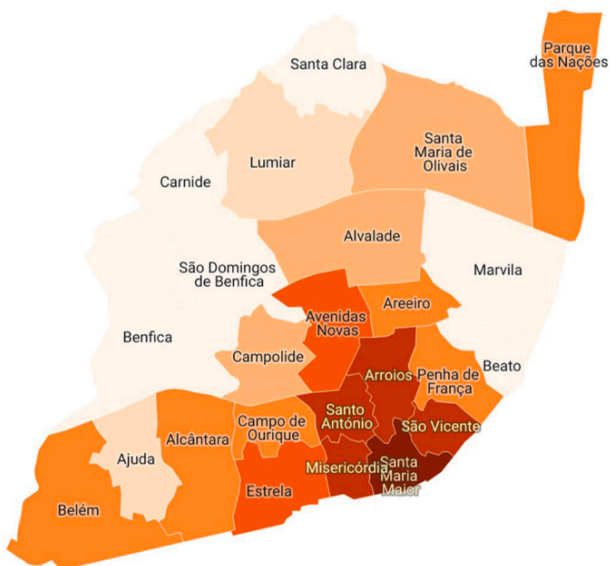
### 2020 (Março)

Nº Unidades de ACD  
< 75 75-115 115-175 175-345 345-755 755-2255 ≥ 2255



### 2021 (Março)

Nº Unidades de ACD  
< 75 75-115 115-175 175-345 345-755 755-2255 ≥ 2255



### 2022 (Março)

Nº Unidades de ACD  
< 75 75-115 115-175 175-345 345-755 755-2255 ≥ 2255

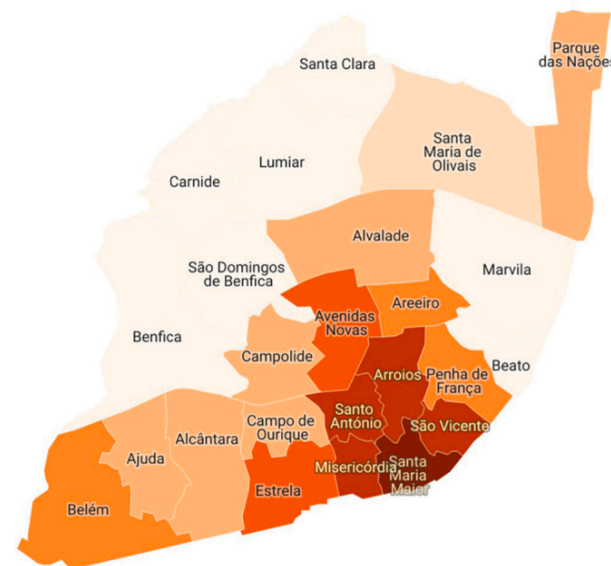
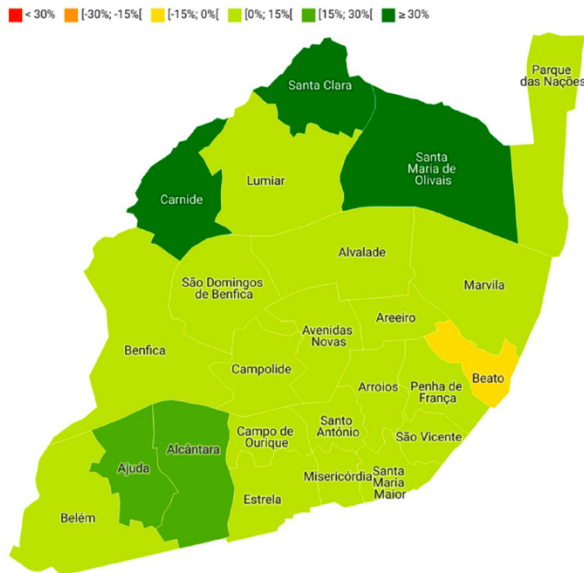


Figura 18. Número de unidades de ACD por freguesia na cidade de Lisboa (2019-2022).

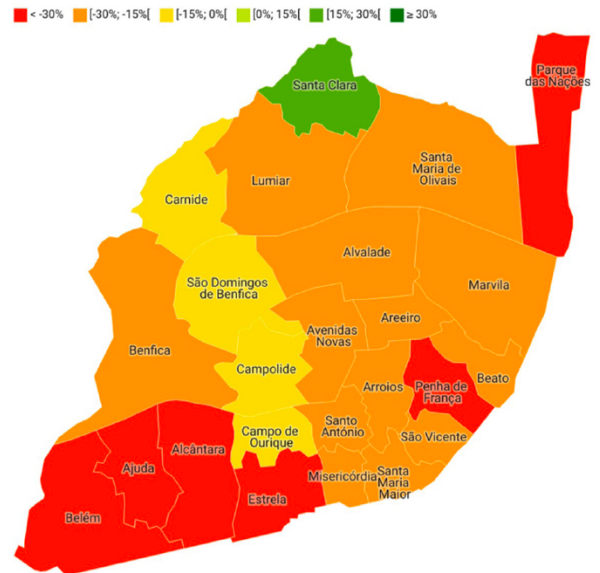
A lei da oferta e da procura facilmente explica o aumento do preço médio face ao decréscimo da oferta e ao aumento da procura. Outro aspeto que merece interpretação é o facto de a pandemia ter provocado uma quebra de unidades disponíveis para

arrendamento bastante mais acentuada nas freguesias periféricas do que no centro histórico (Figura 19).

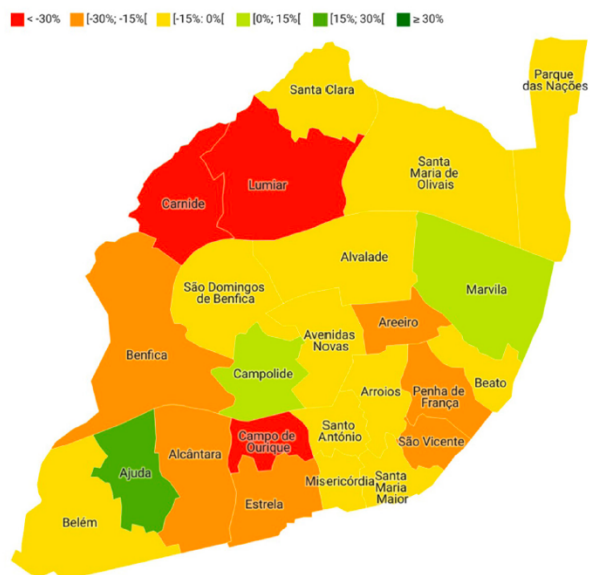
Variação do número de unidades de ACD (2019-2020)



Variação do número de unidades de ACD (2020-2021)



Variação do número de unidades de ACD (2021-2022)



**Figura 19.** Variação em percentagem do número de unidades de ACD nos períodos entre 2019-2020, 2020-2021, 2021-2022 por freguesia na cidade de Lisboa.

## 7. Considerações

Dos dados reunidos neste policie brief, salientam-se três ideias-chave que devem ser tidas em conta pelos atores do setor de ACD:

- Ficou evidente a impreparação do setor para lidar com uma crise de saúde pública e a importância dos proprietários-gerentes implementarem planos de gestão de crise de resposta a futuros surtos epidêmicos;
- O impacto dramático da COVID-19 no negócio obrigou a alterações no modo de operar (implementação de procedimentos de higienização e medidas de segurança) e no modelo de negócio (medidas de reajuste financeiro e de estratégia de marketing) num esforço de estimular a procura;
- Nesta fase de estabilização da pandemia e retoma do setor, a viabilidade financeira de vários negócios está ameaçada devido ao stress financeiro decorrente da contração da procura em 2020 e 2021 e do aumento da inflação em 2022 e 2023.

Os impactos da pandemia na operação do negócio de ACD foram tão fortes que será importante reter estas ideias-chave numa abordagem coordenada e abrangente a todas as partes interessadas para estimular a recuperação a longo prazo.

Tendo em conta a incerteza dos tempos e a imprevisibilidade da pandemia, o desafio maior dos stakeholders turísticos e decisores políticos passa agora pela salvaguarda da viabilidade financeira das empresas de ACD. Medidas que visem aliviar o stress financeiro das empresas e flexibilizar os empréstimos contraídos como hipotecas flexíveis, empréstimos sem juros ou novas opções criativas de financiamento poderão aliviar a pressão sob o negócio (Assaf & Scuderi, 2020).

A COVID-19 desencadeou baixas sem precedentes na mão de obra qualificada disponível para trabalhar no setor. Esta situação requer a criação de medidas de reconquista da confiança do capital humano para estimular o seu regresso ao setor, elevando a sua capacidade de otimismo e resiliência perante eventos desafiadores (Mao et. al, 2020).

A pandemia fornece ainda importantes lições a serem tidas em conta dada a sensibilidade e vulnerabilidade do turismo a futuros eventos de crise (Gössling et. al, 2021). Apostar no planeamento e implementação de planos de gestão de crise adequados às especificidades do setor é outro caminho crítico a ser seguido no futuro, que contribuirá para a recuperação e transformação a longo prazo mais resiliente (Rivera, 2020).

Em última análise, esta trajetória de aprendizagem coletiva entre proprietários-gerentes, decisores políticos e capital humano, permitirá ao setor evoluir de forma mais resiliente e sustentável no futuro pós-pandemia (Sharma et. al, 2021).

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## **6.2. Publication VI – Prescribing a crisis management framework for health-related crises in tourism destinations: lessons from Lisbon during COVID-19**

*The material presented in this section has been submitted to a peer-review journal, International Journal of Tourism Cities – special call Alastair Morrison Programme for Young Researchers.*

Casal-Ribeiro, M., Peres, R., Boavida-Portugal, I., & Seabra, C. (2025-submitted). Prescribing a crisis management framework for health-related crises in tourism destinations: lessons from Lisbon during COVID-19. *Internacional Journal of Tourism Cities*.

### **PRESCRIBING A CRISIS MANAGEMENT FRAMEWORK FOR HEALTH-RELATED CRISES IN TOURISM DESTINATIONS: LESSONS FROM LISBON DURING COVID-19**

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#### **ABSTRACT**

This study explores the crisis management and recovery strategies adopted by Lisbon's tourism industry in response to the COVID-19 pandemic. Using a longitudinal single-

case study design and a mixed-methods approach, the research combines two rounds of semi-structured interviews with key tourism stakeholders and survey data from hotels and short-term rental operators. Findings reveal significant gaps in health-specific crisis planning, with most organizations unprepared for the scope and complexity of a global health emergency. The initial response was predominantly reactive, marked by financial distress, and widespread uncertainty. However, the crisis also accelerated digital transformation, sustainability integration, and inter-organizational collaboration. Informed by the findings and grounded in the literature, the study proposes a five-phase framework for managing future public health-related crises. This framework contributes theoretically and managerially by offering a structure yet adaptive tool to enhance preparedness, response, and long-term recovery in tourism destinations.

## KEYWORDS

Crisis management; health-related crisis; COVID-19; tourism destination; framework

## 1. Introduction

The tourism industry, which is among the most vulnerable industries during times of crisis, has become progressively more exposed to uncertainty and instability in recent years (Nair & Dileep, 2020). This growing exposure is largely due to the increasing frequency and severity of crises faced by tourism destinations worldwide (Pennington-Gray, 2018), including natural disasters, terrorist attacks, political turmoil, and outbreaks of infectious diseases such as SARS, Ebola, and more recently, the COVID-19 pandemic and the monkeypox outbreak (Alshahrani et al., 2022, Gössling et al., 2021; Novelli et al., 2018).

The long-term consequences of health-related crises can be particularly harmful, as recovery is often slower and more complex (Lai & Wong, 2020). Crises of this nature, particularly public health emergencies of international concern and pandemics, have profound ramifications for the tourism industry (Cahyanto et al., 2016), disrupting tourism operations (Huang, 2008), redesigning travel patterns (Zeng et al., 2020), and affecting business profitability and future strategy (Li et al., 2022). The COVID-19 crisis underscored the fragility of the tourism industry, resulting in an unprecedented decline in international travel and a significant impact on export revenues, estimated at a loss of one

trillion dollars (UNWTO, 2020). This had led to substantial disruptions in both short-term and long-term operational and strategic planning (Li et al., 2022). Moreover, it has been widely recognized among the scientific community that the risk of new and more severe pandemics is increasing, driven by increased human-animal interaction, the consequences of climate change, and mounting pressures on ecosystems (Stephen, 2020). Given this increasing frequency of health-related crises affecting tourism, there is an urgent need to examine their impacts on destination management and recovery strategies (He et al., 2013; Park et al., 2022).

Despite growing recognition of the tourism industry's vulnerability, several gaps remain in the literature of tourism crisis management. A substantial body of research has examined the immediate effects of health-related crises - particularly COVID-19 - such as the suspension of travel activities and their influence on tourists' decision-making (Dayour et al., 2021; Sigala, 2020; Zenker & Kock, 2020). However, the extant literature addressing the way tourism organisations navigate change and transformation in the aftermath of such crises remains notably underdeveloped (Utkarsh & Sigala, 2021). There is limited understanding of the long-term recovery processes and strategies that tourism organizations employ in the post-crisis (Seyitoğlu et al., 2022). Research has identified the significance of crisis communication and financial assistance as vital elements of recovery (Gössling, et al., 2020; Sigala, 2020). Nevertheless, inconsistencies persist regarding the sustainability and long-term efficacy of these strategies (Yeh, 2020). Further research is needed to evaluate the broader impact of these responses on the resilience of the tourism industry beyond the immediate crisis period, particularly in the context of health-related crises, where prolonged travel restrictions and shifts in public health concerns create unique challenges (Zenker & Kock, 2020).

While several studies have examined the impact of previous health-related crises such as SARS, Ebola, and H1N1 influenza (Hu et al., 2021; Gao, 2018), the global scope, duration, and severity of the COVID-19 pandemic represented unparalleled challenges. The pandemic exposed critical deficiencies in crisis preparedness, as evidenced by the inadequate response of numerous tourism destinations to such large-scale disruptions (Pennington-Gray, 2018). Similarly, Ritchie & Jiang (2019) emphasized the importance of proactive crisis planning, which was largely absent in many destinations before COVID-19.

Furthermore, there is a gap in the theoretical underpinnings of crisis management frameworks, with many existing frameworks lacking sufficient theoretical support

(Pennington-Gray, 2018) to address the complexities and nuances inherent to health-related crises. Existing frameworks remain generalized and do not fully account for the distinct characteristics of health-related crises. Theories such as chaos theory have the potential to offer valuable insights into the unpredictable and complex nature of health-related crises (Zamoum & Gorpe, 2018), thereby helping tourism organisations in the development of more adaptive and resilient crisis management strategies. However, few studies have explored the application of such theoretical lens in tourism crisis management, especially in the context of health-related disruptions (Choi & Hyun, 2024). Moreover, research has emphasized the need for further knowledge on the resilience of tourism destinations and the effectiveness of recovery strategies, as research on crisis management and resilience in tourism remains fragmented (Pennington-Gray, 2018). This is particularly important in urban settings where challenges such as high population density complicate crisis management efforts. Lisbon, as an urban tourism destination, offers a compelling case study for understanding the unique challenges faced by cities during health-related crises. Cities such as Lisbon faced the added complexity of effectively managing public health risks in densely populated areas while also attempting to maintain their status as key tourist destinations (Ioannides & Gyimóthy, 2020). The COVID-19 pandemic therefore provides a suitable opportunity to investigate how Lisbon's tourism sector responded to the crisis and the lessons learned in terms of crisis management.

This study aims to address the above gaps in the literature by examining how Lisbon's tourism industry responded to the COVID-19 pandemic across the different phases of crisis management. Specifically, the study seeks: (i) to assess the level of preparedness of the Lisbon's tourism industry during COVID-19; (ii) to analyse the emergency operational and strategic responses to the pandemic (iii) to explore the long-term recovery strategies adopted and the lessons learned for future health-related crises. In addressing these objectives, the study will contribute to the existing literature by providing a comprehensive evaluation of crisis management strategies, identifying best practices, and proposing a crisis management framework adapted specifically for public health emergencies. This framework will offer practical insights for tourism stakeholders and destination managers, supporting them in developing more resilient and sustainable strategies to mitigate the impacts of future health-related crises.

## 2. Literature Review

### 2.1. *Health crises and tourism*

Health-related crises, ranging from infectious diseases to super bacteria, have had profound effects on the tourism industry over the years. Since 2000, a cyclical pattern of major infectious outbreaks has emerged every five to six years (Choi & Hyun, 2024), each exerting distinctive impacts on global travel behaviour and tourism dynamics (Chinazzi et al., 2020; Zhong et al., 2024). As health concerns rise, travellers' perceptions of risk influence their decisions, often causing shifts in destination choices and a reduction in international travel (Chen et al., 2022).

The SARS outbreak in 2003 and the avian flu crisis (2003-2004) in Southeast Asia resulted in significant declines in tourism, as travellers became more cautious about potential exposure to infectious diseases (Pforr & Hosie, 2008). For instance, empirical studies reveal that tourists' perceptions of safety were directly influenced by the spread of the SARS virus, with many tourists opting for domestic over international travel (Rittichainuwat & Chakraborty, 2009). However, the impact of SARS varied across different regions. While some destinations experienced a relatively rapid recovery, others experienced prolonged declines in visitor numbers. This highlights the uneven resilience of global tourism markets (Mao et al., 2010).

The H1N1 influenza swine flu pandemic in 2009 further reinforced the susceptibility of tourism to health threats. Originating in Mexico, the virus spread quickly worldwide, exacerbated by the ease of international travel (Khan et al., 2009). In response to the global health crisis, governments worldwide issued a range of measures, including travel bans to and from Mexico, travel advisories and public interventions, which resulted in significant disruption to international travel (Bajardi et al., 2011). The H1N1 pandemic crisis demonstrated two things. Firstly, it illustrated how governmental action is important to combat the spread of disease; secondly, it showed how health risk perceptions can quickly reshape global mobility patterns.

The Ebola epidemic (2014) primarily affected West Africa but had far-reaching consequences for global tourism. While the virus was largely contained within the affected regions of Guinea, Sierra Leone, and Liberia (Wilder-Smith & Osman, 2020), global fear and travel advisories led to a sharp decline in tourism to countries that were

not directly impacted. For example, the tourism industry in Gambia experienced a 60% drop in tourist arrivals as travellers avoided the entire West African region due to the risk of potential exposure (Novelli et al., 2018).

A similar pattern emerged during the Zika virus outbreak (2015-2016), which was primarily concentrated in Latin America (Wilder-Smith & Osman, 2020). The virus, transmitted by mosquitoes, caused a mild illness characterized by fever, and raised concerns about birth defects and neurological complications, particularly among pregnant women (Paixao et al., 2018). Zika virus spread rapidly across the globe, reaching over 100 countries via travellers (Massad et al., 2016a). In response, several countries issued travel warnings, and the outbreak led to a significant reduction in tourism, with public discourse even calling for the cancellation of the 2016 Olympics in Rio de Janeiro (Massad et al., 2016b; Ximenes et al., 2016).

The most severe disruption to date has been the COVID-19 pandemic, declared a global pandemic in March 2020 by the World Health Organization (WHO). The rapid spread and high fatality rates caused a near-complete halt to global travel. International tourist arrivals fell by 74%, and the economic fallout led to widespread unemployment and economic contraction (UNWTO, 2021). Nearly 62 million jobs were lost globally as a result of the pandemic (WTTC, 2021). The economic fallout from COVID-19 was felt acutely across the aviation and hospitality sectors, which experienced massive reductions in demand due to border closures, lockdowns, and travel restrictions (Pai et al., 2023). COVID-19 not only exposed the tourism industry's lack of preparedness for a global-scale health emergency but also highlighted the need for more robust crisis management strategies (Fisher & Wilder-Smith, 2020).

The cumulative lessons learned from these health-related crises emphasize the importance of preparedness and adaptability in the face of future global health challenges (Dolnicar & Zare, 2020; Rittichainuwat & Chakraborty, 2009). As future health threats are inevitable, the tourism industry's response must prioritize public health, economic resilience, and long-term stability to ensure recovery and preparedness for future pandemics (Yu et al., 2020).

## 2.2. *Crisis management in tourism*

Crisis management has emerged as a crucial area within organisational studies, driven by the increasing frequency and complexity of crises in both the public and private sectors

(Bundy et al., 2017). A crisis, typically defined as a low-probability, high-impact event that threatens the viability of an organisation (Pearson & Clair, 1998), requires coordinated planning (Cartier & Taylor, 2020) and strategic responses (Morakabati et al., 2017) to mitigate damage, restore stability and promote resilience. Over the past few decades, various crisis management frameworks have been developed to provide a systematic approach to crisis preparedness, response and recovery. These frameworks help organisations navigate the chaotic and uncertain environment during crisis events and often serve as conceptual guides for policy and decision making (Casal-Ribeiro et al., 2023).

One of the most influential is Faulkner's (2001) tourism disaster management framework, which was originally developed in the context of tourism but is also applicable to other industries. Faulkner's framework describes a six-phase process: pre-event, prodromal, emergency, intermediate, long-term (recovery) and resolution. It emphasises the sequential nature of crisis development and the need for preparedness and learning mechanisms (Faulkner, 2001). Notably, this framework is the most widely used framework in the tourism crisis management literature and has served as the basis for numerous empirical studies in different crisis contexts and destinations (Derham et al., 2022).

Building on Faulkner's work, Ritchie (2004) proposed a strategic crisis and disaster management framework, which integrates risk assessment, strategic planning, and stakeholder management. Ritchie's framework distinguishes itself by embedding crisis management within broader strategic management processes (Ritchie, 2004), arguing that effective crisis response requires alignment with organisational goals, values, and resource configurations (Wut, et al., 2021). It also stresses proactive risk identification and resilience-building prior to the onset of a crisis (Jiang et al., 2019).

Coombs' (2007) Situational Crisis Communication Theory (SCCT) brought a communications-focused perspective by proposing that organisational response strategies should depend on the level of responsibility attributed to the organisation. His framework links response strategy to stakeholder perceptions. Public health crises are typically classified as low-responsibility crises, where the organisation is perceived as a victim rather than a perpetrator (Coombs, 2007). In such cases, it is essential for organisations to disseminate accurate, official information about the outbreak and adopt secondary crisis response strategies, as these approaches are more likely to generate positive stakeholder responses (Kim et al., 2011; Coombs, 2007). This is even more important in

the context of social media, which has increased the visibility and scrutiny of crisis responses, particularly in health-related scenarios that tend to receive more negative media coverage (Eriksson, 2018; Schroeder & Pennington-Gray, 2015).

Despite their richness and value, traditional crisis management frameworks face growing criticism. Many frameworks remain overly generic and prescriptive, lacking adaptability to the real-time, non-linear and interconnected nature of modern crises (Jaques, 2012; Speakman & Sharpley, 2012). For example, the COVID-19 pandemic, exposed the inadequacy of static models and underscored the need for agile, network-based, and resilience-oriented approaches to crisis management (Janssen & van der Voort, 2020; Pennington-Gray, 2018). While traditional crisis management frameworks offer structured approaches to dealing with disruption, a growing academic consensus highlights the strategic role of organisational resilience as a key enabler of effective crisis response and long-term viability (Lew, 2014; Prayag, 2018). Resilience in this context is not simply about returning to the status quo after a crisis, but about absorbing shocks, adapting to new realities and capitalising on emerging opportunities (Duchek, 2020; Espiner et al., 2017; Lengnick-Hall et al., 2011). Moreover, recent research in emergency and disaster risk reduction has indicated a necessity for a paradigm shift, from predictive, command-and-control frameworks to adaptive and complexity-informed structures (Miller et al., 2025). In this light, scholars have increasingly turned to chaos theory as a complementary lens to explain the unpredictability and complexity of tourism crises (Zamoum, & Gorpe, 2018). Chaos theory suggests that open systems, such as tourism destinations, exhibit heightened sensitivity to initial conditions (McKercher, 1999). This sensitivity can be illustrated by the concept of the butterfly effect, which states that minute disturbances can initiate large-scale, unpredictable consequences (Lorenz, 1963). In contradistinction to traditional frameworks, chaos theory conceptualises crisis systems as sensitive, adaptive, and capable of transformation through internal feedback and emergent behaviours.

This approach promotes the development of flexible, non-linear responses within organisations, empowering them to adapt to the evolving nature of crisis dynamics (Miller et al., 2025). Rather than relying solely on rigid and pre-formulated plans, this approach encourages a more dynamic and adaptable response, allowing organisations to respond to crises in a more agile manner (Choi & Hyun, 2024; Janssen & van der Voort, 2020; Speakman & Sharpley, 2012;).

### **3. Methodology**

#### *3.1. Study Area*

Lisbon, the capital of Portugal, is a prominent tourist destination in Europe, renowned for its rich history, vibrant culture, and scenic landscapes. Located on the western coast of the Iberian Peninsula, the city is situated along the Tagus River and the Atlantic Ocean. It offers a diverse range of cultural and historical attractions, including UNESCO World Heritage Sites such as the Jerónimos Monastery and the Tower of Belém are UNESCO World Heritage Sites, which showcase Portugal's maritime history. The city's iconic neighbourhoods, such as Alfama, Bairro Alto, and Chiado, blend tradition with modernity, featuring narrow streets, Fado houses, designer boutiques, and a lively nightlife scene. Tourism plays a crucial role in Lisbon's economy, significantly contributing to the national GDP and playing a key role in job creation and income generation (Bunghez, 2016). In 2024, Lisbon welcomed 6.5 million international visitors, who collectively spent 16.0 million overnight stays (TravelBI). This represented a 4.1% increase compared to the previous year. Lisbon's prominence in international tourism rankings is well-documented. In 2024, the city was awarded the titles of "Europe's Leading City Destination" and "World's Leading City Break Destination" at the 31st edition of the World Travel Awards. Additionally, Lisbon won the "World's Leading Heritage City Destination" award for the first time at the same awards event (World Travel Awards). These accolades serve to reinforce Lisbon's reputation as a top-tier global tourist destination.

#### *3.2. Research Design*

This study employs a longitudinal case study to examine the crisis management strategies and recovery processes of Lisbon, an internationally recognized tourist destination. A key advantage of this approach is its ability to generate data suited for tracking the impact of unexpected events over time (Gerike & Gosselin, 2014), making it essential for evaluating the effectiveness of crisis management strategies and the evolution of tourism business performance over time. This delivers a more accurate measure of outcomes, instead of relying on subjective perceptions that are disposed to social desirability bias (Ritchie & Jiang, 2019). Case studies are widely used in crisis management research to investigate single crisis events or tourism destinations (Ritchie & Jiang, 2019) and serve as a well-established method to explore the complexity of crisis phenomena in the tourism sector

(Stake, 1995). Therefore, a longitudinal single-case study design was chosen to allow for an in-depth contextual analysis of the unique challenges faced by the tourism sector in Lisbon and the strategic responses implemented over time.

A mixed-methods approach was employed to enhance the study's depth and reliability, integrating both qualitative and quantitative data. Given that interviews are one of the most widely used methods in crisis management research (Ritchie & Jiang, 2019), this study employed semi-structured interviews with key tourism stakeholders, including representatives from government tourism organisations, hospitality and tourism associations, and local flagship attractions. These interviews provided valuable insights, including direct quotations from participants regarding their experiences and knowledge (Patton, 2005), into policy decisions, strategic responses, and perceived challenges during the recovery process. Quantitative data were obtained through surveys with hotel and short-term rental operators, capturing key performance indicators such as financial metrics, occupancy rates, and operational adjustments over time. This methodological combination ensures a holistic analysis, linking stakeholder perspectives with measurable business outcomes.

### 3.3. *Data collection and analysis*

The qualitative data collection took place in two rounds: the first between late 2021 and mid-2022, capturing the early stages of the recovery, and the second between 2023 and early 2024, focusing on long-term developments. The semi-structured interviews were conducted in Portuguese, with participants interviewed in person and online, depending on their availability. The interview protocol was developed based on the literature, aligning the study's objectives to the different phases of crisis response (Faulkner, 2001; Ritchie, 2004). It was structured into four main parts to align with the four key stages of crisis management: pre-event, prodromal, emergency, and recovery. Regarding the pre-event phase, participants were asked whether any strategic contingency or crisis communication plans existed before the COVID-19 emergency and, if so, how these plans were structured and implemented. The prodromal phase focused on the initial responses to the impending crisis, exploring early communication strategies and risk management measures. The emergency phase addressed immediate crisis mitigation efforts, examining government and industry actions aimed at minimizing economic damage, as well as emergency communication strategies and the role of media campaigns. Finally, the

recovery phase investigated long-term strategies for rebuilding Lisbon's tourism industry, emphasizing resilience initiatives, marketing campaigns, and stakeholder collaboration. The interviews were conducted with 9 participants (see Table 11), representing the different stakeholders of Lisbon's tourism industry. Participants were informed about the purpose of the study, and informed consent was obtained before proceeding. All interviews were conducted in Portuguese and ranged from 27 to 77 minutes. The interviews were audio-recorded, transcribed, translated into English, and then analysed using a thematic approach with ATLAS.ti to identify key patterns and relevant insights.

**Table 11.** Participants interviewed: sectors represented and interview period

Participants	Sectors	Type of organization	2021-2022	2023-2024
P1	Tourism	National Tourism Board	X	X
P2	Tourism	National Tourism Board	X	X
P3	Tourism	Regional Tourism Association	X	X
P4	Hotel	Sector National Association	X	X
P5	Hotel and Restaurant	Sector National Association	X	X
P6	Travel Agencies	Sector National Association	X	
P7	Short-term rentals	Sector National Association	X	X
P8	Congress, tour, and events	Sector National Association	X	X
P9	Flagship attractions	Top 2 Attractions	X	

In parallel, between May and November 2022, a round of surveys was conducted among hotel and short-term rental operators, focusing on key performance indicators, adaptation strategies, and financial recovery. These surveys were conducted online and in Portuguese, following the same ethical procedures regarding participant consent and study disclosure. Snowball sampling was used to expand the pool of participant, ensuring a broader reach across tourism companies. A total of 98 surveys were collected from short-term rental operators and 21 surveys from hotel units. The data collected was then analysed with the use of SPSS, where descriptive statistics were performed, and frequency distribution was determined.

## 4. Results

### 4.1. Sample Profile

A total of nine semi-structured interviews were conducted with key stakeholders from Lisbon's tourism industry, ensuring a diverse range of sectors were represented. The interviewees included representatives from the national tourism board (NTB), the

regional tourism association, tourism associations, and flagship tourist attractions, thereby ensuring a comprehensive range of viewpoints. This diversity was deemed essential to comprehensively understand the multifaceted impact of the pandemic on Lisbon's tourism landscape.

Additionally, a total of 21 hotels and 98 short-term rental operators participated in the study. Regarding the hotel sample, 57% of the hotels were larger hotels with more than 100 rooms, 33% had 1 to 60 rooms, and 10% had between 61 to 99 rooms. Most hotels in the sample were 4-star hotels (52%), followed by a significant proportion of 5-star hotels (24%) and 3-star hotels (19%). In terms of hotel chain affiliation, 71% of the hotels in the sample were part of a national or international hotel chain, while the remaining 29% were independent units. The short-term rental sample consisted of 98 operators. The size of the short-term rental operators varied considerably, with 44% of respondents being individual property owners managing one property, followed by 39% managing two to five properties, and the remaining 17% of respondents being medium to large operators managing six or more properties. 37% of respondents were self-employed individuals, operating as independent workers, while 16% were sole proprietors, categorised as individual entrepreneurs. A notable portion of the sample, 27%, represented businesses operating as companies, and 20% were managed under third-party management contracts.

## 4.2. Findings

### 4.2.1. Level of preparedness

Prior to the emergence of the global health crisis caused by COVID-19, there was a certain level of prevalence for crisis management plans within Lisbon's tourism sector. However, the primary focus of these plans was largely oriented towards natural disasters, terrorism, and economic downturns, with limited consideration given to health-related crises. A key finding from the interviews and surveys was that while many organisations had contingency measures in place, these were not prepared for the scope or specific challenges posed by a global health emergency.

In the short-term rental sector, 94% of survey respondents indicated that they did not possess any crisis management plans specifically tailored to health-related crises, such as the pandemic. A similar finding was reported by 71% of hotel operators, who indicated that their crisis management protocols were not designed to address health emergencies. This finding reveals a significant gap in preparedness. While certain businesses, notably

NTB, regional tourism association and larger hotels, had developed crisis protocols, these were chiefly oriented towards addressing economic challenges or physical safety concerns (e.g. fire safety or terrorism threats). These protocols proved inadequate in addressing the multifaceted challenges posed by health crises, which necessitated responses such as social distancing, health guidelines, and widespread government intervention.

"We had an emergency plan, but it was designed for accidents, fires, or terrorist attacks. We never considered a health crisis of this magnitude." (P2)

Despite the challenges faced, some organisations were able to leverage prior crisis management experiences, such as responding to SARS and economic recessions, to facilitate expeditious adaptation in the face of the pandemic. Nevertheless, it is important to note that these established emergency protocols were found to lack the requisite level of detail and flexibility to adequately address the unique challenges posed by a public health crisis of the magnitude of COVID-19.

"We had protocols for emergencies like fires or terrorist threats, but nothing prepared us for the scale of COVID-19. Still, our experience with past crises made it easier to react quickly to the new situation." (P9)

#### *4.2.2. Emergency Phase*

The initial response to COVID-19 was largely reactive across Lisbon's tourism sector. In the face of government-mandated lockdowns, travel restrictions, and international border closures, many tourism organisations found themselves ill-equipped to deal with the sudden and far-reaching impacts of the pandemic.

#### **Immediate Operational and Financial Impacts**

The impact of the pandemic on Lisbon's tourism sector was immediate and severe. A key finding from the survey results revealed that 53% of short-term rental operators were compelled to either close their businesses or remove properties from online platforms such as Airbnb and Booking.com. This drastic action was driven by the sudden collapse of demand for tourism services, compounded by uncertainty regarding the duration of the pandemic and the global travel restrictions.

"In the initial months of the pandemic, demand for tourism services disappeared completely. Consequently, half of our constituents were compelled to cease

operations or remove their properties from online platforms such as Airbnb and Booking.com." (P7)

A similar effect was observed in the hotel sector, which experienced a substantial impact from the pandemic. A considerable number of these establishments were compelled to temporarily cease operations or significantly curtail their activities, a situation which gave rise to substantial financial repercussions. In 2020, a significant number of hotels reported revenue losses exceeding 50%. Those that remained operational faced drastically reduced occupancy rates, with international travel grinding to a halt.

"We had to shut our doors to tourists. The repercussions were immediate, and we were compelled to devise strategies for survival during this period of closure." (P6)

The financial distress was pervasive. According to survey data, 95% of short-term rental operators and 98% of hotels experienced substantial revenue losses, with income drops ranging from 50% to 90% or more. These financial challenges were further compounded by the uncertainty surrounding recovery timelines and the gradual return of international tourism. The repercussions on employment were also substantial, with numerous businesses compelled to reduce staff or curtail working hours in response to the precipitous decline in bookings. In the hotel sector, 95% of respondents reported utilised government-sponsored layoff programs, mainly during the first (March- May 2020) and second (January-April 2021) lockdowns. In the short-term rental sector, only 26% of respondents utilised layoff programs during the initial lockdown period to alleviate the financial strain.

"We had to lay off a significant portion of our staff. The situation was so uncertain that we couldn't afford to keep all operations running." (P4)

Moreover, the events sector encountered distinctive challenges. Large events, conferences, and conventions were cancelled or postponed, resulting in loss of revenue. Participant 8 elaborated on the vulnerability of this particular sector, emphasising the high dependence on in-person gatherings, which were severely restricted during the pandemic.

"The cancellation of major events in Lisbon resulted in a significant loss of revenue. We had to adapt, but many businesses in our sector were hit extremely hard, with no clear path forward." (P8)

## **Crisis Communication and Safety Measures**

The effective communication of information was identified as a pivotal element in the initial response to the pandemic. As the crisis began, many businesses implemented health and safety protocols with a view to safeguarding both staff and guests. These measures encompassed enhanced cleaning procedures, the provision of personal protective equipment such as masks and sanitisers, and the implementation of social distancing measures throughout their facilities. The measures were instrumental in fostering visitor confidence, which had been severely diminished due to the uncertainty surrounding travel during the pandemic.

Participant 1 highlighted that clear and consistent communication was crucial from the very outset of the crisis. As part of the NTB's coordinated efforts, their organisation prioritized informing visitors about the health and safety measures being implemented. This proactive communication not only helped reassure tourists during a time of uncertainty but also underscored Portugal's dedication to transparent and visitor-centric crisis management at a national level.

"From day one, we communicated what measures we were taking to ensure the safety of our guests. This was key in maintaining trust during the early stages."  
(P1)

The widespread adoption of the 'Clean & Safe' certification, introduced by Visit Portugal, played a pivotal role in facilitating this communication. This certification was designed to confirm that businesses were meeting the necessary health and hygiene standards established by public health authorities. The certification was a mandatory requirement for most hotels surveyed, with 86% of respondents confirming its necessity. Additionally, the certification proved equally essential for a significant percentage of short-term rentals, with 29% of survey participants identifying it as a mandatory prerequisite. The "Clean and Safe" seal became a key reassurance tool for both tourists and locals, signalling that businesses were taking proactive steps to ensure the safety of their operations.

"The 'Clean & Safe' certification became a sign of reassurance. It was an essential tool for restoring confidence among both travelers and local businesses." (P2)

In addition to the 'Clean & Safe' certification, a significant number of businesses also relied on real-time updates and transparent communication through their websites, social media channels, and booking platforms to keep customers informed about the measures being implemented and any changes to their services. The provision of clear messaging

was critical not only for rebuilding visitor confidence but also for ensuring that visitors felt informed and prepared when they arrived at their destinations.

"We made sure to keep tourists informed at all times, whether it was about the status of their booking or the safety measures in place. Guests appreciated the transparency, and it helped us build their trust." (P6)

Participant 9 explained how their attractions adapted its visitor flow management by introducing timed entry tickets to reduce crowding and ensure proper social distancing. The visibility of these measures reassured guests that the business was taking their health seriously and was committed to providing a safe experience.

"We introduced timed entry tickets to control visitor flow and ensure proper social distancing. The visual presence of safety measures made visitors feel more secure, and it was something we kept promoting." (P9)

#### *4.2.3. Recovery Phase*

As the pandemic persisted, tourism organisations transitioned from short-term reactive responses to the formulation of more strategic and long-term recovery plans. These responses encompassed initiatives such as local tourism promotion, financial adaptations, and a pronounced shift towards sustainability.

#### **Adaptation to new realities**

In response to the challenges posed by COVID-19, a primary strategy for economic recovery was the redirection of marketing efforts towards domestic tourism. In light of international travel restrictions, businesses in Lisbon were compelled to rethink their target market, emphasising domestic tourism as a means to sustain operations. This transition helped mitigate the financial impact on the industry.

"We quickly realized that relying solely on international visitors wasn't sustainable. We shifted towards promoting local tourism and developing partnerships with domestic businesses to ensure survival." (P3)

However, the recovery process has been gradual. Participant 7 noted that long-term rentals helped to stabilising revenue. However, the sector continued to grapple with significant challenges due to the slow return of international tourists and the unpredictability surrounding future health-related disruptions.

"The recovery has been slow. Some of our members adapted to long-term rentals, but international tourism is still down, and we can't rely on just the local market."  
(P7)

### **Access to Government Financial Support**

Government financial support programmes were vital in helping tourism businesses remain operational, yet numerous organisations encountered difficulties navigating the bureaucratic processes required to access these funds. In the short-term rental sector, 27% of respondents reported having applied for government financing and support schemes aimed at tourism to ensure the financial viability of their businesses. However, the financing process was frequently described by respondents as bureaucratic and difficult to access, particularly for small business owners. Furthermore, 71% of hotel respondents were able to turn to government financing and support programmes, underscoring the critical role of these measures in helping businesses manage the financial strain caused by the crisis.

Participant 6 emphasised that the delayed access to financial assistance posed significant challenges, especially for smaller companies that lacked the resources to navigate complex application processes.

"The government's financial support helped, but the application process was complicated. Smaller businesses struggled to navigate the bureaucracy, which delayed the assistance." (P6)

### **Digital Transformation and Long-Term Sustainability**

The crisis also catalysed a shift towards digital solutions, with many businesses adopting contactless systems and online booking platforms to ensure visitor safety and improve operational efficiency. Among the surveyed hotels, 52% implemented remote check-in options, while in the short-term rental sector, 28% of respondents introduced remote check-in options and 11% installed self-check-in kiosks to minimise interpersonal contact between guests and staff, further enhancing safety protocols during the pandemic. While these changes were initially prompted by the pandemic, are expected to play a central role in the future resilience of the tourism sector.

"The digital shift has been a blessing. Not only did it help us continue our operations during lockdowns, but it also gave us the tools to reduce paper use and make the experience more sustainable." (P9)

"Contactless check-ins became essential for ensuring guest safety and minimizing staff interactions. It's something we plan to continue long after the pandemic ends." (P6)

The concept of sustainability emerged as a critical theme in the context of long-term recovery. Participant 2 emphasised that sustainability would remain central to future tourism strategies in Lisbon.

"The pandemic shifted our focus from mass tourism to more sustainable, local tourism. We are working on developing new ways to engage visitors while ensuring the safety and sustainability of the destination." (P2)

This vision consistent with the boarder strategic direction set by the NTB. Participant 1 explained that sustainability become a central pillar of the country's recovery plan. As part of this strategy, a clear focus was placed on people, including tourists, workers, and residents of the sector. This human-centred approach culminated in the formulation of the "Reactivate tourism, build the future" plan in May 2021, which placed significant emphasis on sustainability, with the objective of repositioning Portugal as a destination that offers a more diverse, year-round tourism experience.

"We defined a strategy... And the strategy clearly said 'the focus should be on people – I mean tourists, workers, and residents of the sector.' And we did just that. ... In May 2021, we launched the 'Reactivate tourism, build the future' plan based on the pillar of sustainability in order to promote a different image of the country, hence a focus on literary tourism, industrial tourism, cycling and nature walking, contemporary art, in short, everything that has to do with products that touch the entire territory, that touch the whole year, also capturing a segment of added value for the country." (P1)

Participant 7 also recognised the importance of sustainability in shaping the future of tourism in Portugal. He noted that the country's NTB has effectively embraced the idea of sustainability in all areas, in line with the sector's commitments and long-term positioning.

"Firstly, I think that Portugal's National Tourism Board does a fantastic job of pointing to the future. And they understood, both from the point of view of the sector's obligation and from the point of view of the sector's positioning, that wanting to be a sustainable destination in all areas is the future direction and the ideal positioning." (P7)

#### 4.2.4. *Lessons learned from COVID-19*

##### **Operational Innovations**

A significant positive outcome of the pandemic was the implementation of operational innovations, particularly in safety measures. A significant number of businesses, including hotels, short-term rentals, flagship attractions, expeditiously adopted proactive cleans and safety protocols, such as the distribution of masks and the imposition of restrictions on the number of visitors. These measures were implemented with the objective of restore visitor confidence.

"We didn't wait for government directives. We started implementing safety measures, including mask distribution and limiting visitor numbers, long before the official guidelines were set." (P9)

The pandemic presented an opportunity to rethink the visitor experience and improve crowd management within the flagship attractions. With visitor numbers reduced, the organisation was able to more effectively manage visitor flows, thereby ensuring that the attractions could be enjoyed without the previous overcrowding. This has contributed to the mitigation of wear and tear from large crowds, which had previously been a contributing factor in the damage to fragile elements of the monuments. Additionally, the reduced foot traffic enabled a more considered visitor engagement, facilitating a re-evaluation of the tourism management paradigm in a way that balances visitor satisfaction with heritage preservation.

"We had the opportunity to impose a one-way system, ensuring that no part of the monument was touched or used inappropriately. The pandemic allowed us to think about preservation in a more structured way." (P9)

Furthermore, the advent of digital technologies played a pivotal role in facilitating the transition to this new reality, with contactless payment systems, digital ticketing, and online booking platforms assuming prominence. These measures ensured safety and also led to increased operational efficiency.

"Moving to digital tickets and online reservations helped us maintain operations while reducing environmental impact." (P3)

## **Sustainability and Social Responsibility**

The pandemic has served to underscore the pressing need for sustainability in the tourism sector, while also highlighting the importance of social responsibility. Many tourism organizations in Lisbon transitioned their focus towards initiatives promoting local and sustainable tourism, reflecting a broader shift to balance economic recovery with environmental and social considerations. It was emphasised by several participants that the pandemic had forced the restructuring of tourism offerings, with a particular emphasis on the promotion of local tourism that was less dependent on international visitors. This transition was driven not only by the need to recuperate from the repercussions of the pandemic but also to cultivate a tourism model that was more robust and environmentally sustainable, capable of flourishing throughout the year.

"The pandemic forced us to rethink the model. We shifted from mass tourism to local and sustainable tourism, promoting products that benefit the whole country, ensuring the safety of both the destination and its residents." (P1)

Participant 2 elaborated on the measures undertaken by the NTB to mitigate its environmental footprint. These endeavours entailed the elimination of plastic waste, the utilisation of sustainable materials, and promoting eco-friendly initiatives.

"We no longer just talk about sustainability. It's in everything we do, from eliminating plastic to reducing waste. We now prioritize electric vehicles for our tours and work with local businesses to promote sustainable practices throughout the entire tourism supply chain." (P2)

Furthermore, participant 9 attested to the fact that the closure due to the pandemic had enabled significant advancements in environmental management. The flagship attractions were able to upgrade their irrigation systems and plant new grass. This upgrade not only enhanced the attraction's visual appeal but also contributed to the long-term sustainability of its maintenance. The organisation began implementing eco-friendly conservation methods, such as using essential oils and alcohol-based solutions to clean and preserve the attraction's stone surfaces. These new ecological practices were not only more sustainable but also more cost-effective than traditional methods.

"We used environmentally friendly products, like rosemary and cinnamon oils, to clean the stonework. These methods are not only better for the environment but also less expensive and less damaging to the stone." (P9)

This shift had also a notable impact on community support initiatives, which were found to be integral to the tourism industry's response. Participant 7 emphasised the sector's response to the needs of healthcare workers, offering complimentary accommodation during the crisis's peak. This initiative was not only a gesture of support for the healthcare community, but also a demonstration of the sector's social responsibility and solidarity.

"When the pandemic hit, we knew we had to step up. Offering free accommodation to healthcare professionals was our way of giving back to the community. It not only helped those in need but also created a sense of solidarity within our sector." (P7)

### **Collaboration and Resilience**

The COVID-19 has shone a spotlight on the vital importance of collaboration in ensuring the resilience of the tourism sector in Lisbon. As the crisis unfolded, there was an increased need for cooperation among various stakeholders, including government entities, businesses and local communities. This cooperation, which facilitated timely responses and shared resources to share information, adapt regulations, and implement safety protocols.

"The pandemic made us realize that only through collaboration can we ensure the resilience of the sector. We worked together with local businesses, the government, and even the residents to tackle the crisis." (P2)

"The Ministry of Health was pivotal in providing us with the necessary frameworks to ensure safety. Their timely updates on health protocols allowed us to quickly implement the changes required to protect both staff and guests. Without that collaboration, it would have been impossible to manage the crisis effectively." (P1)

Participant 7 emphasised that, despite the sector's challenges, the shared objective was to ensure the safety of both locals and tourists, and this alignment made the collaboration even more effective.

"It was clear that we were all in this together. We communicated openly with government bodies about the challenges we faced. Without this partnership, we wouldn't have been able to implement the health protocols and financial support measures quickly." (P7)

Additionally, Participant 9 discussed how local tourism businesses collaborated to create joint initiatives that promoted solidarity within the sector. For instance, attractions that had to close temporarily collaborated with other local businesses to support each other

through mutual promotions and discounts for local visitors, effectively shifting the focus to domestic tourism while international travel was restricted.

"The local tourism community really came together. We partnered with other attractions to offer joint promotions for locals. This wasn't just about survival; it was about showing that we could rely on each other to weather this storm." (P9)

The role of communication in fostering such collaboration was also vital. In the face of rapidly changing regulations, it was imperative for businesses to maintain constant and transparent communication between business owners, employees, and government entities. Participant 6 explained how open dialogue allowed them to align their strategies with government guidelines, ensuring that health protocols were not only followed but also communicated clearly to customers.

"We had daily updates from the government and shared them immediately with our teams. The constant flow of information helped us maintain calm and control, and it was reassuring to our guests to know that we were keeping them informed every step of the way." (P6)

In addition to collaboration at the local and national levels, the global tourism network also played a significant role. As international tourism gradually recovered, Lisbon's tourism industry profited from global connections and knowledge-sharing with other international destinations. Participant 3 emphasised the importance of cross-border collaboration in understanding how other countries were navigating the crisis and in adapting best practices to Lisbon's context.

"We worked closely with other European destinations. We exchanged ideas on how to manage health measures, how to balance reopening with safety, and how to support local communities. That global cooperation was invaluable to our response." (P3)

This collective effort not only addressed the immediate crisis but also established the foundations for a more robust tourism ecosystem. The sharing of resources, knowledge and expertise amongst stakeholders enabled more rapid adaptation, risk reduction and expedited recovery. Participant 2 also highlighted the importance of demonstrating flexibility and adaptability in the face of unforeseen challenges, a lesson that was reinforced by the pandemic.

"The crisis showed us that being adaptable is key. We had to adjust our strategies every day, but that agility came from the constant communication and collaboration that was happening at all levels." (P2)

## **5. Discussion and Conclusions**

### *5.1. Conclusions*

The COVID-19 pandemic served as a stress test for the tourism industry, revealing structural vulnerabilities and inadequacies in Lisbon's crisis management plans, particularly in the context of public health emergencies. Drawing from the empirical evidence of this study, it becomes evident that the destination's preparedness was predominantly skewed toward traditional threats such as natural disasters, terrorism, or economic shocks, leaving a critical gap in strategies to address health-related crises. This aligns with the systemic oversight in the tourism industry's crisis management, wherein public health concerns have historically been marginalised (Ritchie & Jiang, 2019). The absence of tailored preparedness plans for health-related crises also corroborates the findings of Pennington-Gray (2018), who identified a general reluctance within tourism entities to proactively engage with non-traditional risks. The inability of Lisbon's tourism industry to foresee the early warning signs of a global health event of this magnitude underscores the need for strategic foresight and timely activation of early intervention mechanisms during the critical period between initial risk signals and the escalation to a full-blown crisis. This stage is where destinations can shift from vulnerability to resilience, provided there is sufficient environmental scanning and risk communication in place (Faulkner, 2001). Resilience should be seen as a continuous dynamic process alongside crisis management rather than a static capacity (Jiang et al., 2021), which chaos theory identifies as critical in managing disruptions (Speakman & Sharpley, 2012; McKercher, 1999).

Once the emergency phase began - marked by lockdowns, travel bans, and operational shutdowns - the response across the industry was predominantly reactive. The collapse in tourism demand, mass closures, and financial instability observed in the Lisbon context reflect the core tenets of chaos theory, which argues that crises often evolve in unpredictable and nonlinear patterns (Speakman & Sharpley, 2012). In the absence of pre-existing health-specific contingency protocols, many organisations resorted to ad hoc responses, including the implementation of basic safety measures and the adoption of the "Clean & Safe" certification. These actions reveal a reliance on reputational repair and

trust-building strategies, which Jiang et al. (2021) identify as critical elements of adaptive capacity in turbulent environments. Nevertheless, certain stakeholders - most notably the NTB and larger hotel chains - demonstrated greater agility. These actors were able to leverage institutional memory and prior crisis management experience to more effectively implement health protocols and structured communication strategies. Such differentiated responses align with the literature on organisational resilience, which highlights the importance of experiential learning, resource availability, and internal knowledge transfer in shaping crisis preparedness and adaptive response (Ritchie, 2009; Coombs, 2015).

The deployment of consistent, transparent, and centrally coordinated messaging—particularly through national campaigns and digital communication channels—proved instrumental in mitigating perceived risk and preserving the destination’s image. These practices are consistent with the principles of SCCT (Coombs, 2015), which emphasises the critical role of level of responsibility on message framing, timing, and audience segmentation in maintaining stakeholder trust and influencing behavioural responses during periods of uncertainty.

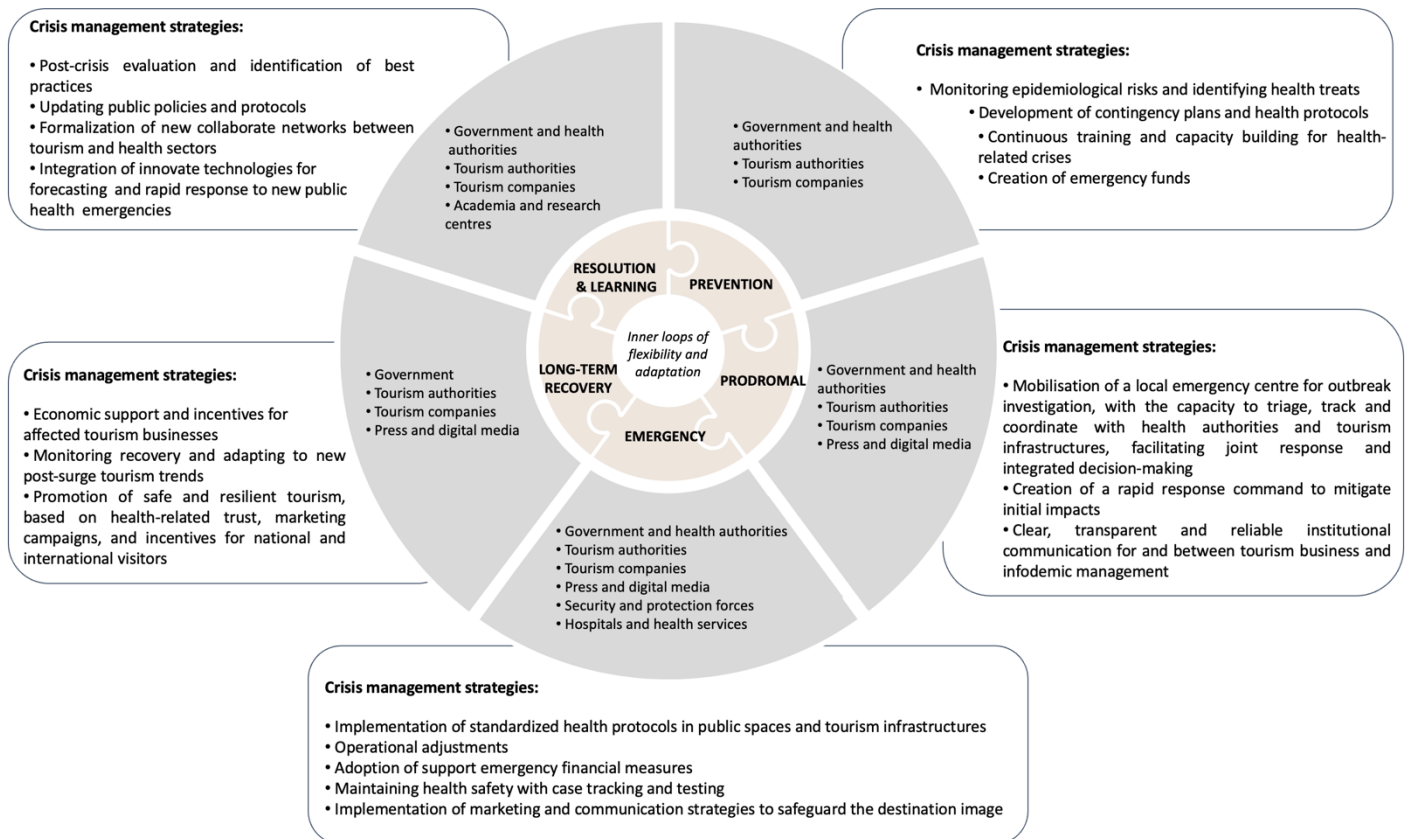
As the crisis evolved, recovery efforts revealed the destination’s growing engagement with long-term strategic shifts. These changes correspond with the transformational capabilities in which recovery is not a return to the status quo but a proactive reconfiguration of operations (Teece, 2017). For instance, the diversification of target audiences, the uptake of digital check-in systems, and the alignment with sustainability-oriented development frameworks (Casal-Ribeiro et al., 2024) reflect the destination's capacity to learn from crisis and integrate long-term resilience measures. However, these improvements were not uniformly accessible. Smaller companies faced structural limitations in accessing government support and digital tools, which stresses that crisis resilience is unevenly distributed across stakeholders within tourism systems (Gani et al., 2021). This finding reinforces the need for systemic, scalable frameworks that support equitable access to resources and knowledge among all stakeholders.

Based on the study’s findings and supported by existing literature, we propose a robust framework for managing future health-related crises in tourism destinations, adapted from Faulkner’s (2001) disaster lifecycle model (Figure 20). It includes five integrated phases: (1) Prevention, (2) Prodromal, (3) Response, (4) Long-Term Recovery, and (5) Resolution and Adaptation. Distinct from traditional linear models, this framework integrates *inner loops* – flexible feedback mechanisms that enable continuous reassessment and strategic adaptation throughout all phases according to the crisis’ level

of complexity over time. This design reflects principles from chaos theory, particularly the need to manage uncertainty and complexity through non-linearity, flexibility, and systemic responsiveness (Ritchie, 2004; Speakman & Sharpley, 2012).

The prevention phase focuses on risk anticipation and institutional preparedness. Destinations are encouraged to carry out comprehensive health risk assessments, develop contingency protocols, and stakeholder capacity-building. Crucially, this phase should engage a broad range of stakeholders – including government and health authorities, tourism authorities, tourism companies - to ensure that planning is inclusive and context-sensitive. Such collaboration reinforces the call for a more interdisciplinary approach to destination crisis management, one that bridges the gap between tourism and public health disciplines (Pennington-Gray, 2018). The prodromal phase represents a critical window of opportunity in which weak signals or early warnings begin to emerge. This stage calls for active surveillance of global and regional health trends, integration with epidemiological data systems, and the readiness to trigger pre-defined contingency protocols. Intersectoral coordination is vital here: tourism boards must work closely with health authorities, the government, tourism companies, and the press to ensure early risk detection and timely response planning and communication. Institutional agility and shared data intelligence are key assets during this phase. The emergency phase involves the rapid activation of emergency protocols to protect both human life and business continuity. Core components include the implementation of integrated health protocols, crisis communication strategies, visitor flow management, activation of emergency financial funds, and alignment with public health directives. A multi-stakeholder approach is essential, involving the government and health authorities, the main tourism organisations, tourism businesses, security and civil protection forces, hospitals and health services. In the long-term recovery phase, attention shifts from survival to strategic repositioning and structural renewal. This phase involves restoring financial viability through economic support, promoting safe and resilient tourism via trust-based marketing strategies, and institutionalising crisis-driven innovations. It also requires ongoing monitoring of post-crisis tourism trends to inform adaptive market repositioning. Recovery strategies should be co-designed with the government and tourism authorities, DMOs, tourism businesses and the press. Finally, the resolution and learning phase address the need for formal learning and systemic integration of lessons into policy and planning. This includes conducting post-crisis reviews, updating risk registers, and embedding health resilience into crisis protocols across all tourism stakeholders. Health

authorities, government, academia, and research centres should be involved in this phase to translate crisis experiences into actionable guidance into future health-specific preparedness cycles.



**Figure 20.** Proposed crisis management framework tailored for health-related crises

## 5.2. Theoretical and practical implications

This framework builds on the limitations revealed during the pandemic and integrates theoretical insights and best practices from the field of crisis management. This study makes a valuable contribution to the theoretical understanding of crisis management in tourism by proposing a dynamic, phased framework grounded in complexity theory and empirical evidence from an urban destination. The integration of non-linear feedback loops and adaptive mechanisms expands tourism crisis management literature by addressing the limitations of traditional static frameworks and highlighting the need for systemic flexibility in the face of health-related crises. The research also deepens our understanding of organisational resilience in urban contexts. In densely populated cities, where crisis management is inherently more complex, resilience is defined by the capacity

to absorb shocks, adapt to new realities, and capitalise on emerging opportunities, rather than merely returning to the status quo. In doing so, it offers a structured yet flexible approach to managing future public health crises - an essential step toward fostering more prepared tourism destinations.

From a practical perspective, the proposed framework provides destination managers and tourism stakeholders with a tangible and adaptable tool for managing public health emergencies. For urban tourism destinations such as Lisbon, the study provides actionable insights into how crisis preparedness, communication, emergency and recovery strategies can be tailored to the unique challenges of densely populated, high-footfall places. For instance, the adoption of digital technologies, visitor flow regulation through timed entries, and the emphasis on domestic and sustainable tourism are particularly relevant for cities that must balance tourist activity with public health and liveability. Furthermore, the emphasis on multi-level collaboration — involving local governments, public health authorities, DMOs, and private sector actors — highlights the need for more integrated governance structures in destinations to ensure effective crisis response and long-term resilience. This is particularly important in city destinations, where the tourism ecosystem is an integral part of urban infrastructure, services, and resident life. Accordingly, the proposed framework promotes the adoption of health crisis preparedness measures by urban tourism stakeholders, not as an independent protocol, but as a cross-cutting component of strategic urban tourism planning and destination governance.

### *5.3. Limitations and future research*

While this study provides valuable insights, it is not without limitations. It is based on a single case study focused on Lisbon, which, although representative of many urban tourism destinations, may not fully capture the unique dynamics of other destinations, particularly those in different geographic, economic, or cultural contexts. As such, the generalisability of the findings to destinations with distinct socio-economic, cultural, or infrastructural characteristics may be constrained. Additionally, the exclusively focus on the COVID-19 pandemic – while with profound and far-reaching impacts - limits the analysis to a single type of public health emergency. Other crises, such as localized epidemics or short-duration health incidents, may entail different challenges and require distinct management strategies. Future research should thus broaden its scope to include

a wider array of health-related and destination types. This would facilitate a more comprehensive evaluation of the applicability and robustness of the proposed crisis management framework. Comparative and longitudinal studies across varied contexts would facilitate a more comprehensive understanding of effective crisis management practices and support the development of more resilient and adaptable strategies for tourism.

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# Chapter 7 – Conclusion

## 7.1. Main findings

The present doctoral research was structured around the development of a conceptual crisis management framework tailored specifically to the context of tourism destinations affected by health-related crises. The development of this framework was informed by the case study of the impact of the COVID-19 pandemic on Lisbon's tourism industry. The research was designed to respond to a series of specific objectives (SO1-SO8), each addressed through a “by publication” format in the previous chapters. The findings respond to these objectives on an individual basis, and collectively they contribute to the articulation of a coherent, evidence-based, and context-sensitive framework for crisis management. A thorough and detailed investigation was conducted, incorporating both an extensive theoretical review and an in-depth empirical analysis. Through this process, this research has achieved its primary objective by synthesising key insights and proposing a robust framework designed to enhance preparedness, response, and long-term recovery in tourism destinations.

### **Addressing SO1: Understanding the initial disruption and its implications for crisis management**

In direct response to SO1 - to provide a foundational understanding of the COVID-19 pandemic's initial disruption to the tourism industry and its implications for crisis management - chapter 2 established the foundation for the research by thoroughly examining the immediate and far-reaching impacts of the pandemic on the global tourism system. What began as a localised public health concern rapidly escalated into a global health emergency, swiftly metastasizing into an equally devastating economic and social catastrophe, particularly for the tourism industry. Unlike previous crises that had impacted tourism, the COVID-19 pandemic presented a novel, multi-dimensional, and far more complex challenge. Its defining characteristics included its global reach, impacting virtually every nation simultaneously; its prolonged duration, extending far beyond typical crisis lifecycles with recurrent waves and variants; and an unprecedented level of uncertainty, regarding its trajectory, medical solutions, and socio-economic

consequences (Sigala, 2020; Zenker & Kock, 2020). This unique confluence of factors demanded more stringent and pervasive containment strategies compared to other previous crisis events. As a result, the implications for crisis management were both immediate and profound, requiring a fundamental rethinking of established paradigms. The global pandemic caused by the COVID-19 virus has exposed the inadequacy of traditional crisis management frameworks with rigid structures. It has also highlighted the urgent need for more holistic, adaptive, collaborative, and health-integrated approaches. This foundational understanding directly informed and justified the subsequent SOs of this research.

### **Addressing SO2: Review and critical analysis of existing crisis management frameworks**

SO2 involved a rigorous review and critical analysis of existing crisis management frameworks within the tourism and hospitality literature. As presented in chapter 3, a rigorous systematic review and meta-analysis of 36 scientific articles published between 2000 and 2022 was conducted. A total of 14 distinct crisis management frameworks were identified from these articles and subjected to a detailed analysis. Among them, Faulkner's (2001) and Ritchie's (2004) frameworks emerged as the most frequently applied in the study of diverse tourism crisis contexts.

The findings demonstrated that the majority of the reviewed frameworks are generalist in orientation, having been developed primarily in response to short-term, acute crises - most notably natural disasters. Consequently, their applicability to crises that are prolonged, diffuse, and rooted in public health dynamics is limited. Furthermore, the review revealed that these frameworks frequently adopt a linear or event-response logic, overlooking the cyclical, uncertain, and evolving nature of health emergencies. In particular, the field continues to demonstrate fragmentation, with minimal integration of public health governance, insufficient emphasis on risk communication, and an underdeveloped understanding of institutional learning processes in the wake of prolonged disruptions. The meta-analysis identified several critical gaps: (1) the absence of health-specific risk anticipation mechanisms and indicators within crisis management planning; (2) the neglect of real-time, multi-channel crisis communication - particularly the strategic role of digital platforms and social media; and (3) the lack of embedded feedback and learning loops that support adaptive capacity and long-term resilience. In view of these significant shortcomings, the meta-analysis emphasised the need for frameworks that integrate

public health perspectives, emphasise agility and adaptability, facilitate multi-sectoral collaboration, and incorporate long-term resilience building that extends beyond mere operational recovery.

### **Addressing SO3: Pre-pandemic level of preparedness**

The research, notable the comprehensive analysis presented in chapter 6, exposed significant deficiencies in Lisbon's pre-pandemic preparedness for public health emergencies within the tourism industry (SO3). While some general emergency plans were in place, specific protocols for managing epidemiological crises were either non-existent or significantly underdeveloped.

At the institutional level, entities such as the NTB and some tourism sector authorities exhibited relatively higher levels of readiness, having implemented broader resilience strategies that included multi-hazard risk registers. However, even among these more advanced actors, the absence of dedicated public health protocols indicated a clear disconnection between general crisis preparedness and the specific requirements of health-related emergencies. The situation was particularly acute among tourism businesses which were largely unprepared to deal with the scale, complexity, and unique demands of a global health crisis. This is confirmed by the empirical findings, which revealed a striking absence of preparedness among surveyed short-term rental operators and hotel managers. A total of 100% of surveyed short-term rental operators and 71% of hotel managers reported having no crisis management plans specifically tailored to public health emergencies. Among the minority who did, the majority of plans lacked the necessary depth and operational detail to be effective during a complex and prolonged crisis such as COVID-19. For instance, existing safety protocols were conventionally devised for incidents such as fires or accidents, with scant integration of procedures for health surveillance, quarantine management, or hygiene enforcement. The findings indicated a tendency towards a reactive stance, rather than a proactive one, emphasising the pressing need for the incorporation of public health considerations into crisis planning at the destination level.

### **Addressing SO4: Crisis communication strategies employed by Visit Portugal**

Chapter 5 addressed the SO4 by critically analysing the digital crisis communication strategies employed by the NTB during the pandemic to safeguard the destination's image and ensure visitor safety under the lens of SCCT. The research identified that Visit

Portugal relied predominantly on secondary crisis response strategies - particularly bolstering and enhancing strategies - across the four distinct phases of the COVID-19 pandemic. These strategies were not only consistent with the low-responsibility nature of the pandemic, but also demonstrated to be significantly more effective in engaging audiences. Posts employing secondary strategies achieved notably higher engagement metrics - especially in terms of likes and shares - compared to those using primary strategies such as rebuilding.

Visit Portugal's approach evolved with the pandemic timeline, transitioning from emotionally supportive messaging during lockdowns to national pride and call-to-action campaigns during reopening phases. During the initial lockdown phase, the NTB focused on emotionally supportive messaging, with campaigns such as *#CantSkipHope* delivering reassurance, fostering a sense of unity, and cultivating resilience among audiences. As Portugal transitioned into the subsequent phases of reopening, Visit Portugal modified its communications to emphasise national pride and collective action. Campaigns such as *#TuPodes* and *#CantSkipOpening* encouraged domestic travel and reinforced confidence in Portugal's preparedness to welcome visitors safely. These posts promoted the concept of responsible tourism and highlighted safety certifications and sanitation measures, thus framing the destination as both secure and forward-thinking. As the crisis evolved towards a state of long-term recovery, the NTB further consolidated the destination's image through sustainability-driven communication, embedding campaigns such as *#SaveOurOcean* and *#PortugalFieldGuide* into its messaging. This evolution is indicative of a deliberate and flexible crisis communication strategy. By aligning its tone, content, and communication objectives with the pandemic's unfolding trajectory, Visit Portugal successfully maintained engagement, reinforced brand trust, and laid the groundwork for long-term destination recovery.

### **Addressing SO5: Immediate impacts and emergency phase response**

As outlined in chapters 5 and 6, the COVID-19 pandemic had immediate repercussions on Lisbon's tourism industry. The emergency phase was characterised by the immediate operational and financial impacts of the crisis, in addition to the subsequent implementation of crisis communication strategies and safety measures aimed at safeguarding public health and maintaining visitors' awareness of the evolving health and safety conditions (SO5).

The emergency phase was marked by unprecedented financial distress, widespread uncertainty, and a reactive scramble to implement safety measures. In the context of a precipitous decline in demand, stakeholders encountered immediate challenges in sourcing the necessary liquidity to sustain operations, leading to widespread temporary closures and layoffs. In the short-term rental sector, 53% of respondents reported being compelled to temporarily close operations or delist properties from digital platforms due to the collapse in demand. Revenue losses were substantial. 98% of respondents reported significant financial losses in 2020, with the majority experiencing declines ranging from 50% to over 90%. Similarly, 95% of hotel respondents reported major revenue drops and relied heavily on the national layoff scheme to retain staff during periods of full or partial closure.

The response measures implemented during this phase were largely ad hoc and driven by national health directives, such as mandatory closures, capacity reductions, and hygiene protocols across the destination. In order to mitigate health risks and ensure visitors were accurately informed, the stakeholders were compelled to swiftly adopt new safety standards and communicate them clearly to visitors. In the short-term rental sector, 56% of respondents provided guests with personal protective equipment kits, while 37% implemented fixed cleaning teams to minimise staff rotation and contact. Hotels adopted similar practices and, in many cases, proceeded further. A total of 86% of hotel respondents and 29% of short-term rental operators were enrolled in the “Clean & Safe” certification programme. This initiative facilitated the standardisation of practices and supported communication efforts by offering clear, visible signals of compliance with public health guidelines. In summary, the emergency phase triggered a highly reactive yet vital set of responses by tourism stakeholders in Lisbon. Although reactive, these measures were vital in addressing both the industry's economic vulnerability and the necessity to ensure the continued engagement, safety and information of tourists through transparent and credible communication.

### **Addressing SO6: Long-term recovery and adaptation strategies**

The transition to the long-term recovery phase, which is explored in depth in chapters 5 and 6, saw Lisbon's tourism industry adopting more strategic and adaptive measures. Stakeholders were compelled to adapt to new market realities, secure financial support, and engage in deeper digital and sustainability transformations (SO6). The findings demonstrate that this period was characterised by a transition from immediate survival

strategies to a more deliberate approach, characterised by strategic adaptation and rebuilding of the destination.

A significant number of stakeholders sought to diversify their target markets, focusing on domestic tourism initially, and adapting their product offerings to appeal to post-pandemic consumer preferences for safety. For instance, in the short-term rental sector, 25% of respondents reoriented their services to appeal to new market segments such as digital nomads and foreign residents, while 26% introduced promotional packages or digital campaigns targeting domestic and long-stay visitors.

Access to government financial support was also a crucial factor in preventing a complete collapse and an enabler of recovery for many businesses. 62% of hotel respondents and 27% of short-term operators reported benefiting from government financial aid or stimulus packages. However, the absence of pre-established, integrated crisis management plans at the destination level increased vulnerability for many small and medium-sized businesses. This was particularly evident as accessing crucial financial assistance posed significant challenges, especially for smaller businesses that often lacked the resources to navigate complex application processes.

Digital transformation also accelerated during the recovery. The use of remote and contactless check-in technologies has been consolidated. 52% of surveyed hotels implemented remote check-in options, while 28% of short-term rental operators introduced remote check-in and 11% installed self-check-in kiosks to minimize contact and enhance safety. This development has the effect of streamlining operations and aligning with the emerging expectations of guests regarding safety and autonomy. Some stakeholders also leveraged new digital tools to manage bookings, client communication, although adoption levels varied depending on organizational capacity.

A renewed emphasis on sustainability as a pillar of long-term competitiveness was closely aligned with these innovations. The national strategy “*Turismo + Sustentável 20-23*” established sustainability as a key driver of recovery. Numerous stakeholders have cited this strategy as a guiding document for their post-pandemic repositioning. A series of interviews were conducted, the results of which indicated a growing interest in obtaining environmental certifications, developing local partnerships, community engagement, and implementing circular economy principles. Overall, Lisbon’s tourism stakeholders engaged in a multifaceted recovery effort that combined innovation, digitalisation, and a growing alignment with sustainability frameworks. While large and institutionally connected actors were better positioned to capitalise on government incentives and

implement structural change, smaller operators also demonstrated resilience through market repositioning and technological adaptation. The implementation of these strategies collectively contributed to restoring competitiveness and building long-term resilience within Lisbon's post-pandemic tourism landscape.

### **Addressing SO7: Transformative lessons learned**

The COVID-19 pandemic served as a learning experience for Lisbon's tourism industry, fundamentally transforming approaches to destination resilience against future public health crises, as evidenced in chapters 5 and 6. The lessons learned encompass operational innovations, a renewed focus on sustainability and social responsibility, strengthened collaboration and overall resilience (SO7).

The crisis instigated a rapid adoption of operational innovations, with a particular emphasis in safety measures. A wide range of stakeholders, including hotels, short-term rentals, and flagship attractions, proactively implemented rigorous cleaning and safety protocols, such as mask distribution and visitor number restrictions, to restore confidence. This digital transformation, alongside with enhanced crowd management in attractions, ensured visitor safety, led to increased operational efficiency and contributed to heritage preservation.

The pandemic underscored the critical need for sustainability and social responsibility, undertaking a strategic shift within the destination. A significant number of organisations in Lisbon undergone a strategic shift in their primary focus towards the promotion of local and sustainable tourism. This strategic modification is underpinned by a dual objective: namely, the balancing of economic recovery with environmental and social considerations. Visit Portugal placed sustainability as a central pillar of its national recovery strategic plan. Flagship attractions, for instance, have enhanced their environmental management by upgrading irrigation systems and implementing eco-friendly conservation methods. Moreover, the short-term rental sector demonstrated social solidarity, notably by offering complimentary accommodation to healthcare professionals during the crisis's peak.

The imperative for robust collaboration was profoundly highlighted, fostering increased cooperation among government entities, businesses, and local communities. This collaborative spirit facilitated more timely responses, shared resources, adaptation of regulations, and implementation of safety protocols. Clear and transparent communication among stakeholders proved vital in navigating rapidly changing

guidelines and maintaining trust. Local tourism businesses engaged in joint initiatives, such as mutual promotions for domestic visitors, demonstrating a collective effort to weather the storm. Additionally, cross-border collaboration and knowledge-sharing with other international destinations played a significant role in adapting best practices. Ultimately, these collective efforts not only reinforced the destination's flexibility and adaptability but also established a stronger foundation for Lisbon's tourism ecosystem to navigate future public health challenges with increased resilience.

### **Addressing SO8: A proposed crisis management framework**

The culmination of this doctoral research is to synthesise theoretical insights from existing scientific literature (SO1-SO2) and the rich empirical findings derived from the Lisbon case study (SO3-SO7) to develop a conceptual crisis management framework explicitly designed for tourism destinations facing health-related crises. This integrated approach ensures that the proposed framework is not merely a theoretical construct but is empirically grounded in the realities and lessons learned from a major global health emergency.

A critical review of extant frameworks (S01-SO2) revealed a significant void: while general crisis management frameworks provided useful structures, they often lacked the specific nuances required for health-related crises, particularly regarding public health integration, epidemiological understanding, and the prolonged, uncertain nature of such events. It is evident that the unique vulnerabilities of the tourism industry to health-related shocks, which have the capacity to simultaneously affect demand, supply, and destination image, are often overlooked. Simultaneously, the empirical analysis of Lisbon's experience (SO3, SO5, SO6, SO7) provided invaluable practical insights. Lisbon's journey through the pandemic, from its initial unpreparedness and reactive responses to its subsequent adaptive recovery and strategic learning, highlighted the critical success factors and persistent challenges. These included the urgent need for enhanced preparedness, the centrality of effective crisis communication (S04), and the indispensable role of multi-stakeholder collaboration. The proposed framework, which is outlined in the end of Chapter 6, was developed from this iterative process of identifying theoretical shortcomings and validating practical needs. It is structured around a multi-phase approach, recognising that health-related crises are not static events but dynamic processes with distinct stages requiring different strategic priorities and actions. The

proposed crisis management framework, specifically tailored for tourism destinations facing health-related crises, comprises the following interconnected and iterative phases:

#### *Phase 1: Prevention*

This phase is characterised by the proactive identification of risk and the development of health-specific contingency plans, which extend beyond general emergency protocols. The Lisbon case demonstrated a clear deficiency in this regard, with the majority of existing plans focusing on natural disasters or economic downturns rather than health emergencies. This phase calls for continuous epidemiological risk monitoring, the development of detailed health protocols, consistent training for the tourism industry, and the establishment of emergency funds. Key stakeholders involved include government and health authorities (Ministry of Health, WHO), tourism authorities, and tourism companies.

#### *Phase 2: Prodomal*

This phase entails the implementation of immediate, coordinated actions during the occurrence of an initial outbreak. It is evident from Lisbon's experience that the response was initially reactive. The framework proposes the rapid mobilization of a local emergency centre capable of triaging, tracking, and coordinating with health and tourism infrastructures to facilitate joint response and integrated decision-making. Crucial elements include transparent and reliable institutional communication to combat infodemics. In this phase, the stakeholders involved are expanded to include the press and digital media as vital communication channels.

#### *Phase 3: Emergency*

This phase emphasizes the implementation of standardised health protocols, operational adjustments according to the outbreak spread, financial support measures, crisis communication, and marketing strategies with the objective of safeguarding the destination's image. In this phase, the stakeholders involved are expanded to include also hospitals, local health units and the necessary security forces.

#### *Phase 4: Long-term recovery*

This phase entails the formulation of strategic recovery plans that encompass long-term recovery. The proposed framework calls for the provision of economic support to affected

businesses, the implementation of monitoring mechanisms to facilitate recovery, the adaptation to novel post-surge tourism trends, and the promotion of safe, resilient tourism practices grounded in health-related trust. Key stakeholders involved in this phase include government, tourism authorities, tourism companies, the press and digital media.

#### *Phase 5: Resolution and Post-Crisis Learning*

This final phase, which is cyclical in nature, is concerned with the integration of lessons learned into future planning. It involves post-crisis evaluation and identification of best practices through data analysis of crisis impacts and response effectiveness, updates to public policies and protocols, the formalisation of new collaborative networks between the tourism and health sectors, and the integration of innovative technologies for forecasting and rapid response. Key stakeholders involved include government, tourism and health authorities, tourism companies, academia and research centres.

The framework is intentionally non-linear, and adaptable, reflecting the complex and evolving nature of health crises. The incorporation of internal feedback loops throughout enables continuous adjustment and strategic flexibility as the crisis unfolds. This iterative learning process is intended to ensure that each crisis contributes to enhancing the destination's future resilience.

## **7.2. Theoretical and practical contributions**

This doctoral research makes a substantial contribution to both scientific theory and practical tourism destination management, particularly within the field of tourism crisis management. Theoretically, the research uniquely synthesises theoretical insights and empirical findings to recommend a novel five-phase conceptual crisis management framework specifically designed for tourism destinations facing public health crises. This contribution directly responds to a critical gap identified in the existing literature, where prevailing frameworks remain either overly generic or insufficiently equipped to address the unique dynamics of health-related crises. By providing a foundational overview of the COVID-19 pandemic's initial disruption, the research also reinforces the understanding of tourism's inherent vulnerability to large-scale, exogenous shocks like pandemics. The unique challenges posed by 21st-century health threats to a globalised

industry are deepened by the fact that, unlike previous crises, the pandemic presented global reach, prolonged duration, and unprecedented uncertainty. Moreover, the research contributes to the extension of the SCCT within a prolonged crisis context. By analysing Visit Portugal's communication strategies, the study provides empirical evidence of how a DMO can leverage communication to safeguard destination image and ensure visitor safety during a health crisis. This enriches the SCCT's practical applicability in tourism contexts.

In terms of practical contributions, the research delivers a structured and operationalizable roadmap for DMOs, governmental authorities at the national and local levels, and private-sector tourism stakeholders. It outlines phase-specific guidance and actionable strategies to facilitate effective crisis preparedness, response, and recovery in the context of public health emergencies. Furthermore, it emphasises the pivotal function of inter-organisational collaboration among diverse stakeholders in facilitating effective crisis management and recovery in tourism destinations. The study advocates for the establishment of stronger partnerships between public health authorities, government bodies, DMOs, and private sector entities.

### **7.3. Methodological contributions**

The present doctoral research employs a robust methodological approach that contributes to the scholarly methods used in crisis management studies. The employment of a longitudinal single-case study design, with a focus on Lisbon during the COVID-19 pandemic, provides an in-depth, real-world understanding of a complex, evolving crisis over an extended period. This design allows for capturing the dynamic nature of crisis impacts and responses, thereby offering insights that are more comprehensive than those obtained from cross-sectional studies. Furthermore, the integration of a variety of qualitative and quantitative methods – systematic reviews, policy analysis, semi-structured interviews, content analysis, and surveys – strengthens the validity and comprehensiveness of the findings. The employment of a mixed-methods approach enhanced the triangulation and credibility of findings. The research collected data from a diverse range of tourism stakeholders, including the NTB, regional tourism associations, hotels, short-term rental operators, travel agencies, events and, flagship attractions. This

approach provided a holistic view of the crisis experience from various standpoints, capturing the complexities of a multi-faceted industry.

#### **7.4. Limitations and future research**

Whilst this doctoral research offers significant theoretical and practical contributions, certain limitations must be acknowledged, which also suggest directions for future research. As a single-case study centred on Lisbon, the generalizability of the empirical findings to other tourism destinations might be limited. Although the proposed framework is conceptual and intended to be adaptable, its broader applicability requires further empirical validation across varied geographic and institutional contexts. Furthermore, while a broad range of tourism stakeholders was included in the research, the perspectives of visitors themselves or residents were not extensively delved into. Finally, although the framework is explicitly tailored to health-related crises, it does not fully differentiate between the distinct characteristics of various health threats—such as localised outbreaks versus global pandemics, or bacterial versus viral pathogens. Future refinements may be required to account for these nuances within the framework’s operational protocols, ensuring context-specific applicability and precision.

In the context of future research, the potential exists for the undertaking of comparative studies across a range of tourism destinations with varying attributes. These attributes may include, but are not limited to, size, the extent of destination development, the degree of reliance on international tourism, the perception of cultural risk, governance structures, and the distinction between urban and rural destinations. The implementation of such comparative studies would serve to assess the generalisability and adaptability of the proposed five-phase framework. It is recommended that future studies could also incorporate a more in-depth analysis of tourist perceptions, behaviours, and trust-building during and after health crises. Such an analysis should examine how crisis communication influences these aspects and attempt to understand which secondary response strategies have a greater impact on tourist behavioural intentions towards a destination facing a prolonged public health crisis. Moreover, future research could examine the transformative role of emerging technologies - such as big data analytics for real-time risk detection and early warning, or virtual reality for destination promotion during restrictions – as enablers of enhanced crisis preparedness, response, and recovery in

tourism destinations. Finally, further investigation into the policy and governance structures required to facilitate effective inter-organizational coordination and resource mobilisation during large-scale health emergencies—particularly within complex, multi-level governance systems—would offer valuable insights for both theory and practice.

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# Supplementary materials I

## Survey Template | Hotels

O presente longitudinal conduzido entre 2020 e 2024 visa analisar os impactes da pandemia e medidas de controlo implementadas no destino de Lisboa, identificando os desafios atuais e futuros da indústria no que respeita a práticas mais resilientes num contexto pós-COVID-19.

Todas as respostas serão tratadas de forma anónima e agregada no tratamento e apresentação de resultados.

### Parte I | Nível de preparação

1. Antes da pandemia COVID-19, a unidade possuía algum plano interno de atuação e gestão de crises. (SingleSelection)

Sim

Não

*\*Não, avançar para a pergunta 3*

2. Em que consistia o plano interno de gestão de crise e como é que estava implementado? (OpenEnded) \_\_\_\_\_  
\_\_\_\_\_

### Parte II | Impacte da pandemia

3. Desde o início da pandemia, teve a(s) unidade(s) encerrada em algum momento? (SingleSelection)

Sim

Não

*\*Não, avançar para a pergunta 5*

4. Desde o início da pandemia, em que períodos teve a(s) unidade(s) encerrada(s)? (MultipleSelection)

	Jan	Fev	Mar	Abr	Mai	Jun	Jul	Ago	Set	Out	Nov	Dez
2020												
2021												

5. Desde o início da pandemia, a unidade recorreu a layoffs? (SingleSelection)

Sim

Não

*\*Não, avançar para a pergunta 7*

6. Em que períodos a(s) unidade(s) recorreu a layoffs? (MultipleSelection)

	Jan	Fev	Mar	Abr	Mai	Jun	Jul	Ago	Set	Out	Nov	Dez
2020												
2021												
2022												

7. Em 2020, a(s) unidade(s) registou quebras percentuais na taxa de ocupação? (SingleSelection)

Sim

Não

8. Em 2020, a(s) unidade(s) registou quebras percentuais nas receitas totais? (SingleSelection)

Sim

Não

*\*Não (e não em P7), avançar para a pergunta 10*

9. Se sim, selecione o(s) intervalo(s) percentual? (MultipleSelection)

	Menos de 20%	Entre 21% e 35%	Entre 36% e 50%	Entre 51% e 65%	Entre 66% e 80%	Entre 81% e 90%	Mais de 90%
Quebra na ocupação							
Quebra nas receitas							

10. Que medidas de combate à COVID-19 foram implementadas na(s) unidade(s) de forma a assegurar uma operação segura para todos? (MultipleSelection)

- Máquina de self-check na recepção
- Check-in remoto
- IVAucher
- Proteção acrílica nos balcões da recepção
- Controlo da temperatura à entrada
- Certificado de vacinação
- Teste negativo à COVID-19
- Kit de máscaras e desinfetante nos quartos
- Procedimento de higienização mais completo
- Obtenção do selo Clean & Safe
- Suspensão de serviços (restaurante, spa)
- Equipas fixas e menos rotatividade entre turnos
- Room service robótico
- Room service controlado por voz (voice control room service)
- Outra: \_\_\_\_\_

11. Foi definido um colaborador responsável pelo planeamento e implementação destas medidas)? (SingleSelection)

- Sim
- Não

*\*Não, avançar para a pergunta 13*

12. Se sim, identifique o cargo do colaborador. (OpenEnded)\_\_\_\_\_

13. A(s)unidade(s) recorreu às linhas de financiamento e apoio para o Turismo criadas pelo governo? (SingleSelection)

Sim

Não

*\*Não, avançar para a pergunta 16*

14. Se sim, como classifica o processo de financiamento e apoio criado pelo governo? (MatrixSingleSelection)

1= Muito burocrático

7 = Muito célere

15. Se sim, como classifica o apoio? (MatrixSingleSelection)

1= Muito insuficiente

7 = Muito suficiente

16. Quais as maiores dificuldades que a(s) unidade(s) enfrenta neste período pandémico de incerteza? (MultipleSelection)

Cancelamento de reservas

Dificuldade de acesso a medidas de apoio

Alteração recorrente das medidas decretadas pelo governo

Limitação da capacidade de operação

Staff

Viabilidade financeira

Outra: \_\_\_\_\_

17. O Turismo de Portugal tem apostado numa comunicação digital centrada em mensagens de esperança #CantSkipHope e promoção da imagem pública na fase de reabertura #CantSkipOpening. Como avalia esta estratégia de promoção do destino? (MatrixSingleSelection)

1= Nada eficiente

7 = Muito eficiente

### Parte III | Recuperação

18. A taxa de ocupação da(s) unidade(s) no verão de 2021, face ao período homólogo do ano anterior foi? (MatrixSingleSelection)

1= Muito inferior

7 = Muito superior

19. No verão de 2020, registaram-se reservas de hóspedes maioritariamente\_? (SingleSelection)

Nacionais

Estrangeiros

Misto

20. No verão de 2020, registaram-se reservas de hóspedes maioritariamente\_? (SingleSelection)

Nacionais

Estrangeiros

Misto

21. A taxa de ocupação da(s) unidades no mês de Dezembro de 2021, face ao período homólogo do ano anterior foi? (MatrixSingleSelection)

1= Muito inferior

7 = Muito superior

22. Qual tem sido a estratégia de marketing e comunicação da(s) vossa(s) unidade(s) durante a pandemia? (MultipleSelection)

Redução dos preços

Criação de pacotes promocionais

Flexibilização das políticas de cancelamento e alteração de reservas

Campanhas de marketing digital

Comunicação do selo Clean & Safe

Aposta em novos nichos de mercado

Outra: \_\_\_\_\_

23. Qual o grau de confiança numa possível normalização do turismo internacional até ao final de 2022? (MatrixSingleSelection)

1= Pouco confiante

7 = Muito confiante

#### Parte IV | Características da organização

24. Qual a categoria da(s) unidade(s)? (SingleSelection)

5 estrelas

4 estrelas

3 estrelas

2 estrelas

1 estrela

25. Qual o número de quartos (incluindo suites e apartamentos) da(s) unidade(s)? (SingleSelection)

Até 20 quartos

Entre 21 e 40 quartos

Entre 41 e 60 quartos

Entre 62 e 80 quartos

Entre 81 e 100 quartos

Entre 100 e 120 quartos

Mais de 120 quartos

26. A(s) unidade(s) pertence a algum grupo hoteleiro? (SingleSelection)

Sim

Não

Muito obrigada pela participação neste estudo.

# Supplementary materials II

## Survey Template | Short-term rentals

O presente longitudinal conduzido entre 2020 e 2024 visa analisar os impactes da pandemia e medidas de controlo implementadas no destino de Lisboa, identificando os desafios atuais e futuros da indústria no que respeita a práticas mais resilientes num contexto pós-COVID-19.

Todas as respostas serão tratadas de forma anónima e agregada no tratamento e apresentação de resultados.

### Parte I | Nível de preparação

1. Antes da pandemia COVID-19, a unidade possuía algum plano interno de atuação e gestão de crises. (SingleSelection)

Sim

Não

*\*Não, avançar para a pergunta 3*

2. Em que consistia o plano interno de gestão de crise e como é que estava implementado? (OpenEnded) \_\_\_\_\_

\_\_\_\_\_

### Parte II | Impacte da pandemia

3. Desde o início da pandemia, teve o(s) seu(s) alojamento(s) encerrado(s) ou retirado(s) dos canais de distribuição? (SingleSelection)

Sim

Não

*\*Não, avançar para a pergunta 5*

4. Desde o início da pandemia, em que períodos teve o(s) seu(s) alojamento(s) encerrado(s) ou retirado(s) dos canais de distribuição? (MultipleSelection)

	Jan	Fev	Mar	Abr	Mai	Jun	Jul	Ago	Set	Out	Nov	Dez
--	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----

2020												
2021												

5. Desde o início da pandemia, recorreu a layoffs? (SingleSelection)

Sim

Não

*\*Não, avançar para a pergunta 7*

6. Em que períodos recorreu a layoffs? (MultipleSelection)

	Jan	Fev	Mar	Abr	Mai	Jun	Jul	Ago	Set	Out	Nov	Dez
2020												
2021												
2022												

7. Em 2020, registou quebras percentuais na taxa de ocupação? (SingleSelection)

Sim

Não

8. Em 2020, registou quebras percentuais nas receitas totais? (SingleSelection)

Sim

Não

*\*Não (e não em P7), avançar para a pergunta 10*

9. Se sim, seleccione o(s) intervalo(s) percentual? (MultipleSelection)

	Menos	Entre	Entre	Entre	Entre	Entre	Mais de
--	-------	-------	-------	-------	-------	-------	---------

	de 20%	21% e 35%	36% e 50%	51% e 65%	66% e 80%	81% e 90%	90%
Quebra na ocupação							
Quebra nas receitas							

10. Que medidas de combate à COVID-19 foram implementadas no(s) seu(s) alojamento(s) de forma a assegurar uma operação segura para todos? (MultipleSelection)

- Instalação de máquina de self-check
- Check-in remoto
- IVAucher
- Controlo da temperatura à entrada
- Certificado de vacinação
- Teste negativo à COVID-19
- Kit de máscaras e desinfetante nos quartos
- Procedimento de higienização mais completo
- Obtenção do selo Clean & Safe
- Suspensão de serviços complementares
- Equipas fixa de limpeza
- Outra: \_\_\_\_\_

11. Foi definido um colaborador responsável pelo planeamento e implementação destas medidas)? (SingleSelection)

- Sim
- Não

*\*Não, avançar para a pergunta 13*

12. Se sim, identifique o cargo do colaborador.  
(OpenEnded) \_\_\_\_\_

13. Recorreu às linhas de financiamento e apoio para o Turismo criadas pelo governo?  
(SingleSelection)

Sim

Não

*\*Não, avançar para a pergunta 16*

14. Se sim, como classifica o processo de financiamento e apoio criado pelo governo?  
(MatrixSingleSelection)

1= Muito burocrático \_\_\_\_\_ 7 = Muito célere

15. Se sim, como classifica o apoio? (MatrixSingleSelection)

1= Muito insuficiente \_\_\_\_\_ 7 = Muito suficiente

16. Quais as maiores dificuldades que a(s) unidade(s) enfrenta neste período pandémico de incerteza? (MultipleSelection)

Cancelamento de reservas

Dificuldade de acesso a medidas de apoio

Alteração recorrente das medidas decretadas pelo governo

Limitação da capacidade de operação

Staff

Viabilidade financeira

Outra: \_\_\_\_\_

17. O Turismo de Portugal tem apostado numa comunicação digital centrada em mensagens de esperança #CantSkipHope e promoção da imagem pública na fase de reabertura #CantSkipOpening. Como avalia esta estratégia de promoção do destino?  
(MatrixSingleSelection)

1= Nada eficiente \_\_\_\_\_ 7 = Muito eficiente

### **Parte III | Recuperação**

18. A taxa de ocupação do(s) seu(s) alojamento(s) no verão de 2021, face ao período homólogo do ano anterior foi? (MatrixSingleSelection)

1= Muito inferior

7 = Muito superior

19. No verão de 2020, registaram-se reservas de hóspedes maioritariamente\_? (SingleSelection)

Nacionais

Estrangeiros

Misto

Sem reservas (alojamento encerrado)

20. No verão de 2020, registaram-se reservas de hóspedes maioritariamente\_? (SingleSelection)

Nacionais

Estrangeiros

Misto

Sem reservas (alojamento encerrado)

21. A taxa de ocupação do(s) alojamento(s) no mês de Dezembro de 2021, face ao período homólogo do ano anterior foi? (MatrixSingleSelection)

1= Muito inferior

7 = Muito superior

22. Qual tem sido a estratégia de marketing e comunicação do(s) seu(s) alojamento(s) durante a pandemia? (MultipleSelection)

Redução dos preços

Criação de pacotes promocionais

Flexibilização das políticas de cancelamento e alteração de reservas

Campanhas de marketing digital

Comunicação do selo Clean & Safe

Aposta em novos nichos de mercado

Outra: \_\_\_\_\_

23. Qual o grau de confiança numa possível normalização do turismo internacional até ao final de 2022? (MatrixSingleSelection)

1= Pouco confiante

7 = Muito confiante

#### Parte IV | Características da organização

24. Quantas unidades de alojamento local possui na cidade de Lisboa? (SingleSelection)

- 1 AL
- 2 a 5 AL's
- 6 a 9 AL's
- 10 a 15 AL's
- 15 a 20 AL's
- Mais de 20 AL's

25. Quem trata da exploração do seu(s) alojamento(s)? (SingleSelection)

- Próprio (trabalhador independente)
- Próprio (empresário em nome individual)
- Próprio (empresa)
- Terceiros (contrato de gestão)

Muito obrigada pela participação neste estudo.

# Supplementary materials III

## Interview Protocol | First Round

Esta entrevista decorre no âmbito do projeto de investigação - Crisis management for tourist destinations during health-related crises: A case study of Lisbon in the context of COVID-19- financiado pela FCT a decorrer no Centro de Estudos Geográficos do Instituto de Geografia e Ordenamento do Território da Universidade de Lisboa (IGOT).

Este projeto tem como principal objetivo desenvolver competências no âmbito da gestão de futuras crises no destino turístico de Lisboa, através da análise da resposta à COVID-19. Esta entrevista terá como intuito conhecer a sua perceção sobre os impactes da pandemia no destino de Lisboa, o sucesso das medidas de controlo implementadas e os desafios atuais e futuros da indústria no que respeita a práticas sustentáveis num contexto de pós-pandemia COVID-19.

Desde já informo que as suas respostas serão tratadas de forma agregada na apresentação de resultados.

Seguidamente, pede-se ao/à entrevistado/a que responda às seguintes questões:

### Parte I | Nível de preparação

1. Antes da pandemia, a organização possuía algum documento estratégico de contingência - diretrizes de atuação e/ou comunicação - para os agentes do sector seguirem perante uma situação de crise sanitária?
  - 1.1. Se sim, qual o documento e em que é que consistia?
2. Qual era o grau de preparação dos agentes do sector da cidade de Lisboa para lidar com uma crise pandémica como esta?

### Parte II | Fase de emergência

3. Qual a reação inicial dos agentes do sector às medidas de controlo sanitário implementadas?
  - 3.1. Qual a perceção dos agentes do sector sobre a timing da resposta? Implementação de medidas de controlo sanitário rápida ou lenta?

4. Como descreveria o impacto da pandemia no sector da cidade de Lisboa e as principais dificuldades sentidas pelos agentes do sector?
5. Como é que a organização/associação tem estado a apoiar os agentes do sector neste período pandémico?
6. Que novos procedimentos os agentes do sector têm vindo a adotar para minimizar os danos da COVID-19 e assegurar uma operação segura tanto para os funcionários como os visitantes/clientes?
7. Como foi percebida a implementação do selo Clean&Safe junto dos agentes do sector?
8. Como é que os agentes do sector classificam o processo de financiamento e apoio para o Turismo criado pelo governo (suficiente, processo muito burocrático)?

### **Parte III | Fase de recuperação**

9. Que tipo de apoios governamentais devem ser criados para continuar a estimular a retoma turística da região de Lisboa e quais as principais preocupações manifestadas pelos agentes do sector relativamente ao futuro?
10. Qual o grau de confiança numa possível normalização do turismo (internacional) até o final de 2022 tendo em conta a evolução da pandemia nos últimos meses e a mobilização do plano de vacinação?

Agradecimento pela disponibilidade do/a entrevistado/a, reiterando a importância do seu contributo para a investigação em curso.

# Supplementary materials IV

## Interview Protocol | Second Round

Relembro que esta entrevista decorre no âmbito do projeto de investigação - Crisis management for tourist destinations during health-related crises: A case study of Lisbon in the context of COVID-19- financiado pela FCT a decorrer no Centro de Estudos Geográficos do Instituto de Geografia e Ordenamento do Território da Universidade de Lisboa (IGOT).

Este projeto tem como principal objetivo desenvolver competências no âmbito da gestão de futuras crises no destino turístico de Lisboa, através da análise da resposta à COVID-19. Esta entrevista terá como intuito conhecer a sua perceção sobre os impactes da pandemia no destino de Lisboa, o sucesso das medidas de controlo implementadas e os desafios atuais e futuros da indústria no que respeita a práticas sustentáveis num contexto de pós-pandemia COVID-19.

Desde já informo que as suas respostas serão tratadas de forma agregada na apresentação de resultados.

Seguidamente, pede-se ao/à entrevistado/a que responda às seguintes questões:

### Parte I | Fase de recuperação

1. Pode-me falar um pouco sobre como tem corrido a recuperação do turismo desde a última entrevista?
  - 1.1. Quais os principais desafios e melhorias sentidos pelo sector?
  - 1.2. O sector já retomou a níveis de pré-pandemia?
2. Tendo em conta o feedback dos vossos associados, quais as principais aprendizagens que o sector retirou desta pandemia?
  - 2.1. Já a nível organizacional, quais foram aqui as principais aprendizagens retiradas com a pandemia (e.g. gestão de risco e planeamento, formação e programas de consultadoria aos associados, criação de novos protocolos, comunicação de crise)?
    - 2.1.1. Neste momento, a organização tem algum funcionário/consultor responsável especificamente pelas áreas de gestão de risco, planeamento e gestão de crise? Incluindo aqui também a área da comunicação de crise?

3. Na seu entender, que possíveis desafios poderá o sector vir a enfrentar num futuro tendo em conta a conjuntura atual do país e da europa (ex. ordenamento sustentado, inflação, novos riscos e surtos)?
  
4. Como é que os agentes do sector se poderão preparar para uma nova pandemia no futuro?

Agradecimento uma vez mais pela disponibilidade do/a entrevistado/a, reiterando a importância do seu contributo para a investigação.

# Supplementary materials V

## Coding Matrix | Secondary Qualitative Data (social media content)

<i>Type of Crisis Response Strategy</i>	<i>Definition</i>
<b>1. Deny (DE):</b>	The denial posture is an organization's attempt to deny responsibility.
1.1. Attack the accuser	<i>Confronts the person or group claiming something is wrong with the organization.</i>
1.2. Denial	<i>Asserts that there is no crisis.</i>
1.3. Scapegoat	<i>Blames some person or group outside of the organization for the crisis.</i>
<b>2. Diminishing (DI):</b>	Argues that the organization lacked control over the crisis (Coombs 2007)
2.1. Excuse	<i>Minimizes organizational responsibility by denying intent to do harm and/or claiming inability to control the events that triggered the crisis.</i>
2.2. Justification	<i>To explain why the crisis occurred and minimizes the perceived damage caused by the crisis</i>
<b>3. Rebuilding (RE):</b>	Presents actions that the organization takes to cope with a crisis (Coombs 2007)
3.1. Compensation	<i>Crisis manager offers money or other gifts to victims; waive charges fees; extend loyalty program.</i>
3.2. Apology	<i>Indicates the organization takes full responsibility for the crisis and asks stakeholders for forgiveness.</i>
3.2. Endorsement	<i>Expert endorsement: outsider news/research to indicate the low risk of traveling during COVID.</i>
3.3. Prevention	<i>Follow strict cleaning procedures during COVID; Clean &amp; Safe; mask mandate; rapid testing.</i>
<b>4. Bolstering (BO)</b>	Reminds stakeholders of <b>past</b> good works by the organization (Coombs 2007) and occurs when the organization portrays themselves as a victim (Coombs, 2014)
4.1. Ingratiation	<i>Crisis manager praises stakeholders and/or reminds them of past good works by the organization; current customer or tourist testimony; employee organizational citizenship behaviors.</i>
4.2. Reminder	<i>Tell stakeholders about the past good works of the organization; reminder of past travel experiences; call back to travel.</i>
4.3. Victimage	<i>Crisis managers remind stakeholders that the organization is a victim of the crisis too.</i>
<b>5. Enhancing (EH):</b>	Focuses on the organizations' public good deeds <b>during</b> the crisis (Kim and Liu 2012)
5.1. Appreciation	<i>Showing appreciation for medical services providers</i>
5.2. Collaboration	<i>Support other CSR, e.g. Red Cross, Food bank, WHO</i>
5.3. Goodwill	<i>Company initiated COVID-related CSR, e.g., deliver medical cargo; bring Americans home; transport medica workers</i>

# Supplementary materials VI

## Ethics Committee Approvals



### STATEMENT OF THE ETHICS COMMITTEE OF THE INSTITUTE OF GEOGRAPHY AND SPATIAL PLANNING OF THE UNIVERSITY OF LISBON

#### PARECER (STATEMENT) 7/2025

The Ethics Committee of the Institute of Geography and Spatial Planning of the University of Lisbon (IGOT-ULisboa), certifies, at the request of researcher Mariana Casal-Ribeiro, that the research project entitled: **Modelo de gestão de crise e recuperação de destinos turísticos em situação de pandemia: O estudo da cidade de Lisboa face à COVID-19** (*Crisis management model and recovery of tourist destinations in a pandemic situation: Study of the city of Lisbon in the face of COVID-19*), which applied surveys to the tourist offer - hotel units and local accommodation - in the city of Lisbon and interviews to selected stakeholders from the tourism industry to collect information within the scope of the doctoral project that has the scientific supervision of Professor Inês Boavida-Portugal (IGOT, University of Lisbon), was communicated for ethic appreciation to this Commission.

Considering the commitments assumed by the researcher, the content of the information relating to the conditions of collection, access, processing and data storage provided to us, we concluded that the ethical issues involved in the project are in accordance with the principles that govern the research carried out at IGOT/CEG, at the University of Lisbon. No ethical issues were identified that could compromise the identity, values or freedom of the respondents.

Carrying out this study is justified by its scientific interest, which is in alignment with the training and research objectives developed within the scope of IGOT and CEG of the University of Lisbon. The ethical dimension of the research is ensured by IGOT/CEG's commitment to respecting the *Code of Conduct and Best Practices of the University of Lisbon* and the Helsinki Chart.

Lisboa, 11 de Junho de 2025

Paula Matos

Jorge Malheiros

Comissão de Ética do Instituto de Geografia e Ordenamento do Território da Universidade de Lisboa (*Ethics Committee of the Institute of Geography and Spatial Planning of the University of Lisbon*)

## DECLARATION

Ethical approval from the Ethics Committee of the Escola Superior de Hotelaria e Turismo do Estoril/ Estoril Higher Institute for Tourism and Hotel Studies is not required for the research presented in the article: " DMOs and social media crisis communication in low-responsibility crisis: Insights from #VisitPortugal response strategies during COVID-19.

  
**Raúl das Neves Filipe**

  
**(President of the Ethics Committee of ESHTTE)**

  
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