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Tourism Recovery - The Municipality of Sintra

João Dias Rosário Pinto

Master in Hospitality and Tourism Management,

Supervisor:
PhD Professor Hélia Gonçalves Pereira,
Assistant Professor,
Department of Marketing, Operation and Management,
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Resumo

Tendo em conta o impacto da pandemia COVID-19 na indústria do turismo, especificamente para os destinos turísticos, a presente dissertação de mestrado expõe um plano de marketing estratégico para o concelho de Sintra visando a recuperação da sua indústria turística.

Os destinos turísticos precisam de se adaptar às circunstâncias criadas pela crise, assim como desenvolver estratégias para ultrapassá-las, enquanto oferecem experiências autênticas aos seus consumidores. Assim, é indispensável compreender a evolução das necessidades, expectativas, e preferências dos consumidores, bem como ter um forte conhecimento da indústria, dos pontos fortes do destino turístico, e do posicionamento dos seus concorrentes.

Evoluir com a pandemia é uma necessidade, por isso foi desenvolvido um novo posicionamento para Sintra, bem como uma nova abordagem ao seu mercado-alvo, oferta de produtos turísticos, e estratégia de comunicação. A presente dissertação de mestrado pretende aproveitar a atual crise para melhorar a indústria do turismo de Sintra e torná-la num destino turístico de referência em Portugal.

Palavras-Chave: Gestão De Crises, Destinos Turísticos, Plano de Marketing, Sintra.

Códigos de Classificação JEL: H12 Gestão de Crises, L83 Turismo, M31 Marketing.

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Abstract

Taking into account the impact that the COVID-19 pandemic brought to the hospitality and tourism industry, and specifically to tourism destinations, this master thesis presents a strategic marketing plan for the municipality of Sintra aimed at the recovery of its tourism industry.

Tourism destinations need to adapt to the current crisis circumstances and create strategies to overhaul them, while still providing meaningful experiences to customers. In this matter, it is crucial to understand the evolution of consumers' needs, expectations, and preferences, as well as to have a strong knowledge of the industry, the destination's strengths, and the positioning of its competitors.

Evolving with the pandemic is a necessity, hence the development of a redesigned positioning for Sintra, as well as a new approach for its target market, product offering, and communication strategy. This master thesis intends to take advantage of this crisis to improve Sintra's tourism industry and establish it as a prime tourism destination in Portugal.

Keywords: Crisis Management, Tourism Destinations, Marketing Plan, Sintra.
JEL Classification Codes: H12 Crisis Management, L83 Tourism, M31 Marketing.

Contents

Executive Summary

The hospitality and tourism industry is facing one of the biggest crisis ever registered. The COVID-19 pandemic affected and continues to affect millions of people worldwide and the tourism industry is no exception to it. Tourism destinations play a critical role in assuring the continuity and development of the hospitality and tourism industry by bringing confidence to consumers. Thus, this project aims to present a strategic marketing plan for the recovery of a tourism destination, specifically the municipality of Sintra.

Crises and disasters are chaotic, complex, and bring a great deal of uncertainty. To overhaul them, flexible crisis and disaster management strategies must be adopted by tourism destinations to limit the impact of such events.

Despite the inherent threats of crisis and disasters to destinations, opportunities can also arise if crisis communication strategies are applied to provide reliable and consistent information to consumers, enhance the image of the destination, and increase stakeholders' confidence.

To overtake crisis and disasters, tourism destinations need to master the preferences, needs, and motivations of their target markets, and create strategies that differentiate themselves from the competition. These strategies can consist on delivering a diverse product offering that allows destinations to be more competitive, provide more customizable experiences, and increase customers' satisfaction.

Developing a strong brand to create a positive image in the minds of all stakeholders should be the focus of tourism destinations' marketing plans, specifically for promotion-mix strategies. Nowadays, social media is crucial to successfully accomplish these strategies as it increases brand engagement and brand equity due to its widespread acceptance, accessibility, and higher degree of confidence among users.

The COVID-19 pandemic caused a downturn of a previously growing hospitality and tourism industry and a change in consumer behavior. During health crisis, consumers expect higher security and hygiene standards, as well as attribute more importance to sustainable destinations, nature and adventure tourism, and enotourism. Moreover, consumers are looking for more authentic destinations and customizable experiences. All these needs can be met by Sintra as a tourism destination. Sintra is a well-established international brand, recognized as the capital of romanticism due to its unique environment and communion between nature and romanticist attributes. It also offers a rich gastronomy and wine offering as well as a strong adventure tourism segment.

Having in mind the extensive macro-environmental, sector, consumer, competition, and internal analysis, as well as a literature review, the major strengths and weaknesses of Sintra, and the industry's major opportunities and threats were identified to develop a strategic plan for this tourism destination. Hence, Sintra's vision should aim to provide a complete and immersive tourist experience to its visitors by promoting its most appreciated attributes (e.g. nature, romanticism, culture, gastronomy) and differentiate itself from the competition.

New visitor profiles for Sintra were created (e.g. Modern Family, Adventure Seekers) focusing on different attributes appreciated by tourism consumers, and a redesigned positioning was conceived to combine the new customer's expectations, the positioning of Sintra's competitors, and Sintra's main strengths. Thus, Sintra should position itself as a tourism destination located in the region of Lisbon recognized by UNESCO as World Heritage Site and Cultural Landscape that possesses a rich cultural and natural heritage aimed to satisfy the needs, wants and expectations of its visitors. Furthermore, Sintra's differentiation should rely on its internationally recognized brand as the "capital of romanticism" to provide a complete and immersive tourism experience to a wide range of visitor profiles due to its variety of natural, cultural, and gastronomic assets.

In terms of the tourism products that Sintra should offer, it is advised that some changes are made, specifically in the way that the products are promoted to consumers. Nature, adventure and cultural tourism should remain as the core tourism products of Sintra as they are the ones that have the highest notoriety and associated consumer satisfaction. As far as the diversity of the destination, it should be promoted through qualifying products, namely golf, gastronomy and enotourism, as they can fulfill different visitors' preferences. Finally, Sintra should aim to develop tourism products such as events and business tourism, health and wellness tourism, and residential tourism, as well as create one-shop tourism experiences for different tourism products to enhance the product offer.

As far as the communication plan for the tourism of Sintra it should focus on three main communication methods, public relations, social media, and advertising. The promotion of the tourism of Sintra should highlight the inherent strengths of this destination, establish an emotional connection with consumers, and increase tourists' confidence to visit Sintra. The core products should be the anchor of the communication plan with strategies to promote the diversity of the destination through the qualifying

products. As far as the in-development tourism products there should be strategies to raise awareness to all stakeholders.

Ultimately, Sintra should be remembered by its stunning romanticism character, able to attract visitors and provide them with unique and authentic experiences anchored by a rich natural and cultural heritage.

Context of the Problem

The hospitality and tourism industry is one of the main drivers of the Portuguese economy, representing 8.7% of the national GDP and 6.9% of the country's total workforce in 2019 (Turismo Portugal, 2020).

The COVID-19 pandemic felt worldwide had and continuous to have damaging impacts in the tourism industry with record declines in revenue and overnight stays. Tourism destinations felt the impact of this crisis and so did the majority of workers and businesses. Specifically in Sintra, there was a significant decrease in overnight stays of almost 50% in the first 4 months of 2020 due to the pandemic (Turismo Portugal, 2020).

Consumer behavior also changed with the crisis, as consumers expect higher security and hygiene standards and more frequent and reliable information of the procedures developed for the tourism industry.

It is crucial that tourism destinations implement strategies to turnaround the order of events and overcome the crisis that has drastically affected a previously growing hospitality and tourism industry.

1. Literature Review

1.1. Crisis and Disaster Management

Faulkner (2001) distinguished crises from disasters according to the cause, either internal or external. According to the author, crises occur due to inefficiencies in planning and management, while disasters are generated by "events over which the victim has little control and their impacts are, therefore, to some degree unavoidable" (Faulkner, 2001, p. 146). Crises and disasters are chaotic, complex, and have a great deal of uncertainty (Ritchie, 2004; Faulkner, 2001). While many disasters are attributed to events beyond organizations' control, tourism destinations can make efforts to be more or less prone to certain types of crises and disasters and their consequences by developing crisis management plans in advance (Faulkner, 2001; Ritchie, 2004).

Tourism professionals recognize the existence of crisis and disasters in the sector (Cró & Martins, 2017; Pforr & Hosie, 2008; Faulkner, 2001) and some suggested that their recovery appears to be more difficult and complex for the tourism industry than for other industries due to its global importance (Cró & Martins, 2017; Mair, Ritchie & Walters, 2016; Cavlek, 2002; Backer & Ritchie, 2017; Ritchie, 2004). The indicated can be explained by the necessity to integrate the needs of several stakeholders that can include governments, destination management organizations, travelers, hospitality organizations, among others (Cavlek, 2002; Cró & Martins, 2017). Moreover, the complexity of recovering from a crisis for the tourism industry includes implementing strategies that ease the renewal of the destination's image, short and long-term rehabilitation of tourism infrastructures, effective crisis communication management, facilitating travel and business, and consumer support (Cavlek, 2002; Steiner, et. al, 2012; Backer & Ritchie, 2017; Cró & Martins, 2017).

The tourism environment, characterized by globalization, interdependence, and connectivity, opened the industry to more risks. Thereupon, crises or disasters in one part of the world may significantly impact other parts of the globe. This increases the importance of crisis management strategies to limit the impact of crises and disasters in destinations (Ritchie, 2004; Coombs, 2010).

Different crises require different approaches and strategies. Thus, for an effective crisis management strategy, it is important to consider crises and disasters' size, frequency, duration, and magnitude (Backer & Ritchie, 2017; Ritchie, 2004). Furthermore, to achieve a proper crisis management response, it should be a priority to

understand the characteristics of current and prospective markets to implement the appropriate communication strategies (Backer & Ritchie, 2017; Biran et al., 2014; Walters, Mair & Ritchie, 2014; Breitsohl & Garrod, 2016). Recovering from a crisis should be done not only from an economic perspective but also from a social dimension (Mair, Ritchie & Walters, 2016).

Pedersen, Ritter and Di Benedetto (2020) suggested a model for crisis and disaster management that includes five stages that differ in their content and duration: pre-crisis normality, emergence, occurrence, aftermath, post-crisis. On the other hand, both Ritchie (2004) and Combs (2010) suggested a different approach for crisis and disaster management that consists of three main stages: prevention and planning (pre-crisis normality), implementation (emergence and occurrence), evaluation and feedback (aftermath and post-crisis).

During the crisis management process, it is imperative to be flexible and adaptive, evaluate and tailor the strategy to the current state of the crisis or disaster. Each stage of the process includes several tasks that should be implemented by managers to mitigate the effects of the crisis/disaster. Identifying the stage of a crisis or disaster proves to be significantly more challenging when they are spread over a geographically vast area (Ritchie, 2004; Pedersen, Ritter & Di Benedetto, 2020; Coombs, 2010).

Combs (2010) suggested that most crisis lifecycle models assume that the crisis or disaster is linear. However, most of these events (crisis and disasters), such as the most recent coronavirus pandemic shows that the linearity is not certain (Pedersen, Ritter & Di Benedetto, 2020; Coombs, 2010). Having this in mind, these models need to be studied carefully as they are a simpler representation of reality. Instead, researchers can opt to characterize a crisis lifecycle in circular standings and with more prominence in trying to reduce the negative impacts of such events rather than preventing them (Pedersen, Ritter & Di Benedetto, 2020; Coombs, 2010).

The pre-crisis (prevention and planning) stage of crisis management focuses on proactive planning, prevention, preparedness and strategy formulation (e.g. environmental scanning; scenario planning; strategic forecasting, risk analysis) in order to recognize the existence of a crisis/disaster in opportune time. During this phase, managers should prioritize the understanding of the distinct types of crises and disasters that might occur in their destination and design appropriate strategies to actively respond and mitigate the impact of the aforementioned situations (Ritchie, 2004; Pedersen, Ritter & Di Benedetto, 2020; Coombs, 2010).

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The following stage of crisis management is concerned with strategy implementation during crisis emergence and occurrence. As well as flexibility, this phase requires constant monitoring of the evaluation and control of strategies, resource management, collaboration with internal and external stakeholders, and crisis communication strategies (Ritchie, 2004; Pedersen, Ritter & Di Benedetto, 2020).

Tourism is an inter-relationship industry where stakeholders are dependent on each other to develop integrated strategies for the industry (Ritchie, 2004; Mair, Ritchie & Walters, 2016). Thus, stakeholders should cooperate for effective strategy implementation (Racherla & Hu, 2009; Jiang & Ritchie, 2017). Nevertheless, different stakeholders will experience different impacts from the crisis or disaster, consequently, they might have different needs for collaboration (Graci, 2013). Several authors pointed out the importance of communication, trust and commitment, as well as the significance of social and cultural backgrounds to achieve stakeholder collaboration (Imperial, 2005; Ansell & Gash, 2008; Scarpino & Gretzel, 2014).

In order to cooperate, stakeholders must have at least one common interest (Ansell & Gash, 2008) that might include information sharing, financial support, network and relationships improvement, and, the most common, achieving positive outcomes after a crisis or disaster (Ansell & Gash, 2008; Jiang & Ritchie, 2017).

Notwithstanding the importance of financial resources to provide support during crises, organizational factors (e.g. flexibility, adaptation, evaluation, leadership, employee empowerment) should not be forgotten as they may be more effective in a positive outcome of a crisis management strategy implementation (Ritchie, 2004).

The last phase of crisis management is concerned with evaluation and feedback (crisis aftermath and post-crisis). During this stage, destinations are susceptible to positive and negative transformations. For some, a crisis/disaster might be a decisive moment in which they are able to learn from the situation by making policy changes or adapt strategies that were not effective (Faulkner, 2001; Ritchie, 2004; Mair, Ritchie & Walters, 2016; Pedersen, Ritter & Di Benedetto, 2020). Recovering is the main activity of the last stage of crisis management and is dependent on the work that was done in the previous stages of crisis management (Pedersen, Ritter & Di Benedetto, 2020; Pedersen, C. L., & Ritter, T., 2020). Finally, destinations should implement a feedback loop back to the initial stage to enforce proactive planning and prevention (Ritchie, 2004; Williams, et. al, 2017; Pedersen, Ritter & Di Benedetto, 2020).

1.1.2. Crisis Communication

Having a comprehensive communication strategy is essential to limit the damages caused by crises and disasters (Barbe & Pennington-Gray, 2018; Mair, Ritchie & Walters, 2016). Poor communication strategies often make crises worse as they bring doubt and insecurity to stakeholders. For example, avoiding communication is perceived as worse than negative communication because it reduces the destination's trust and credibility (Seeger, 2006; Barbe & Pennington-Gray, 2018).

It is well known that crisis and disasters are threats to destinations, however some authors suggested that these events can also be opportunities, if crisis communication strategies are applied (Fall & Massey, 2006; Ulmer and Sellnow, 2002).

Managers should make efforts to provide reliable and consistent information to stakeholders in order to enhance the image of the destination and increase visitors' confidence (Barbe & Pennington-Gray, 2018). Chaffey (2016) highlighted the importance of social media in crisis communication due to its widespread acceptance and capabilities to quickly spread information and to provide real-time communication. In addition, because social media is a form of electronic word of mouth, it is considered by its users as more reliable (Chaffey, 2016; Sigala, 2011; Barbe & Pennington-Gray, 2018)

Moreover, destinations should develop effective partnerships that facilitate the communication between the interested parties (Mair, Ritchie & Walters, 2016). It is of paramount importance the thorough creation of crisis management plans with an intense focus on marketing to prevent the loss of tourism by repairing destinations' image (Avraham, 2015; Mair, Ritchie & Walters, 2016).

In order to properly recover from a crisis, destinations should invest in specific and direct marketing strategies to limit their negative impacts and expedite the recovery process. These appear to be more effective in the post-crisis stage than unfocused strategies (Coombs, 2014; Mair, Ritchie & Walters, 2016; Barbe & Pennington-Gray, 2018).

1.2. Destination Marketing

1.2.1. Destinations

According to Hall (2000) and Davidson and Maitland (1997), destinations are characterized by geographical boundaries (i.e. countries, islands, towns). This definition represents the classical or traditional approach to tourism destinations considering that it focuses on destinations' geographical components (Jovicic, 2019). In contrast, a

destination can also be a notion that varies with customers' purpose of visit, cultural background, or past experiences (Buhalis, 2000). For Buhalis (2000, p. 98), a destination is a "geographical region which is understood by its visitors as a unique entity, with a political and legislative framework for tourism marketing and planning". Included in this definition, is the premise that tourism products and services are part of a consistent brand.

With the growing importance of stakeholders and their relationships within destinations, Jovicic (2019) suggested a systemic approach that accounts for the emergence of smart cities as information-based destinations with strong connections to ICTs and the focus on consumers' "smart" experience and tourism "smart" ecosystem (Jovicic, 2019).

Despite some divergences in the definition of destinations, Buhalis (2000) proposed a framework with the most common elements that characterize them such as attractions, accessibility, amenities, available packages, activities, and ancillary services (see Figure 1.1).

Attractions (natural, man-made, artificial, purpose built, heritage, special events)
Accessibility (entire transportation system comprising of routes, terminals and vehicles)
Amenities (accommodation and catering facilities, retailing, other tourist services)
Available packages (pre-arranged packages by intermediaries and principals)
Activities (all activities available at the destination and what consumers will do during their visit)
Ancillary services (services used by tourists such as banks, tele-communications, post, newsagents, hospitals, etc.)

Figure 1.1 - Six As framework for the analysis of tourism destinations

(Buhalis, 2000)

1.2.2. Destination Marketing and Management

The complexity of destinations and the inherent relationships between the various stakeholders (e.g. local communities, businesses, investors, tourists) make them significantly more challenging to manage than goods and services (Line & Wang, 2017; Dwyer & Kim, 2003; Kladou, et. al, 2017; Qu, Kim & Im, 2011).

Destination management organizations (DMOs) have four generally accepted objectives that include the long-term prosperity of local communities, maximization of visitors' satisfaction, maximization of local businesses' profitability, and optimization of tourism impacts by ensuring the harmony between economic benefits and socio-cultural

and environmental costs (Novais, Ruhanen & Arcodia, 2018; Chi, Cai & Li, 2017; Bahar & Kozak, 2007; Dwyer & Kim, 2003).

In order to achieve these objectives, it is indispensable that the tourism policy and the regional development strategic plan are in consonance with destination marketing and management. Tourism marketing strategies should be broad (Novais, Ruhanen & Arcodia, 2018) and include not only strategies to increase visitation and promote the history, image and legacy but also strategies to mitigate overcrowding, environmental problems, safety and security, seasonality, and sensitivity to local culture (Bahar & Kozak, 2007; Chi, Cai & Li, 2017; Evans, Fox & Johnson, 1995). Furthermore, destination marketing and management should promote the sustainable development of tourism and act as a strategic instrument (Novais, Ruhanen & Arcodia, 2018).

To properly develop marketing strategies for destinations, marketers need to master the preferences, needs, wants, and motivations of their target markets (Buhalis, 2000; Bahar & Kozak, 2007). This should be done using marketing research to find the segments that can be attracted, prospective customers, and to identify the factors that are valuable for each visitor category (Qu, Kim & Im, 2011).

Despite the existence of problems in identifying turning points, the destination life cycle is one of the most used tools to identify the stage of tourism in the destination. The life cycle of the destination suggests that different marketing mix strategies should be formulated for different stages of the destination since they experience different environmental and socio-cultural impacts (Butler, 1980; Chi, Cai & Li, 2017).

1.2.3. Destination Competitiveness Strategies

DMOs should formulate and implement strategies that maximize their competitiveness (Line & Wang, 2017; Dwyer & Kim, 2003). Some of the most widely known and used strategy models for destinations are Porter's generic strategies (Porter, 1980), Gilbert's proposition for differentiation of the destination (Gilbert, 1990), and Poon's analysis for flexible specialization (Poon, 1993).

For the specific case of destinations, the "overall cost leadership", the "commodity area" or the "standard product model" seem to be the least desirable due to the limited supply/capacity of (natural and man-made) resources at the destination level. Moreover, although these strategies can bring more economic benefits, in the long-term customer satisfaction will decrease, and the destination will feel the impacts on its sustainability and competitiveness (Line & Wang, 2017; Usakli & Baloglu, 2011).

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Following a "differentiation strategy", a "status area" or a "flexible specialization" appears to be the most advantageous competitive strategy for destinations This type of strategy increases customers' satisfaction and willingness to pay more, maximizing the benefits for destinations (Buhalis, 2000, Dwyer & Kim, 2003, Line & Wang, 2017; Usakli & Baloglu, 2011).

To achieve higher competitiveness, Buhalis (2000) recommended DMOs to develop strong partnerships between all stakeholders, to adopt new technologies, and to use strategic management and marketing instruments to optimize the tourism impacts on the destination. In addition to these, Poon (1993) suggested destinations to be environmentally conscious and to optimize distribution channels. Moreover, Dwyer & Kim (2003) proposed a model to more accurately measure destinations' overall competitiveness with factors that influence consumers' willingness to visit the destination (see Annex A) and that allow them to identify the strengths and weaknesses of destinations.

1.2.4. Destinations Marketing Mix

The products of destinations are the physical, environmental, and socio-cultural characteristics that include the climate, landscape, history, monuments, individual buildings and built environment, among others. Several destinations developed products directly associated with this range of attributes, while others promoted products that are not related with the specific characteristics of the destination. Destinations can have several primary products that are related mainly with the physical environment, hospitality, range of services, gastronomy, and experiences (Line & Wang, 2017; Benur & Bramwell, 2015). This is a representation of the inherent complexity of tourism destinations and the synergies that should exist between primary products to ensure the product diversification and coherence to consumers. Having product diversity allows destinations to be more competitive, provide further and more customized experiences, and be more flexible to customers' needs, wants and preferences (Benur & Bramwell, 2015).

Creating strategies for primary products must account for the development of niche or mass tourism products (see Figure 1.2). These two categories are related with the intensity of tourism in the destination and with the diversity of products. The mix of niche and/or mass tourism products will affect the relation between the tourism industry and the local community as well as the sustainability of the destination (Benur & Bramwell, 2015; Christou, 2012).
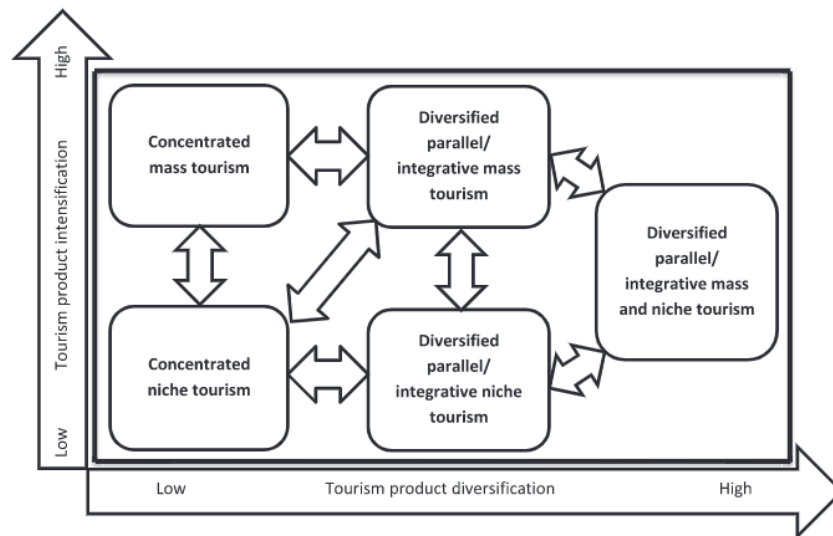
Figure 1.2 - Framework of tourism product development options in destinations

(Benur & Bramwell, 2015)

Product diversification in destinations can take place in a parallel or integrative approach. The parallel approach befalls when primary products attract different customer segments and are independently managed. On the other hand, the integrative approach occurs when primary products are offered together. Destinations that develop an integrative approach can enhance customers' perceptions and experiences as well as the destination's image and competitiveness (Benur & Bramwell, 2015).

Pricing is a more complex process for destinations because it is usually determined by individual businesses. However, implementing the proper macro and micro-economic policies can create the appropriate conditions for more cohesive pricing strategies across the destination. It is extremely important for destinations to create the perception of value for consumers because if they are dissatisfied, the destination will become less competitive (Buhalis, 2000; Dwyer & Kim, 2003).

For destinations, the distribution channel includes the set of businesses that gather demand and supply. With technological advancements, the destinations that offer their consumers more comprehensive tools and adopt new technologies will be better prepared to fulfill their objectives (Buhalis, 2000).

Finally, destinations will need to be promoted through the development of communication channels as well as the conveying of a harmonized message across stakeholders. The promotion of destinations should aim to create and sustain a positive image (brand associations) based on cognitive and affective factors without selling unrealistic expectations (San Martín, Herrero & García de los Salmones, 2019).

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Branding is being widely used as an instrument that differentiates destinations from the competition (Dedeoğlu, Van Niekerk, Weinland, & Celuch, 2019; Chen, Zhou, Zhan & Zhou, 2020; Barnes, Mattsson, & Sørensen, 2014). Destination branding refers to the construction of a brand for a destination based on its identity to develop a positive image in the minds of stakeholders that identify and differentiates the destination (Anholt, 2010; Qu, Kim & Im, 2011). Destination branding is more complex than product and service branding because it describes a destination and the travel experience that comes associated with it (Chen, Zhou, Zhan & Zhou, 2020; Kladou, et. al, 2017; Qu, Kim & Im, 2011).

For consumers, one of the most important factors when choosing a destination is its image (Line & Wang, 2017; Buhalis, 2000). Image is the set of expectations and perceptions that a prospective consumer has of a destination, and the sustainability of local resources is one of its most important factors (Anholt, 2010; Buhalis, 2000; Huerta-Álvarez, Cambra-Fierro, & Fuentes-Blasco, 2020). A destination image should be formulated with the coordination of all stakeholders since all of them have an interest in communicating a strong and appealing image to visitors (Line & Wang, 2017). A compelling destination image constitutes a differentiator factor, and together with brand identity, are critical components of a successful destination brand (Qu, Kim & Im, 2011).

Hollebeek, Glynn, & Brodie, (2014) defined brand engagement as a "psychological and behavioral state connecting consumers with brands". Brand engagement positively affects brand loyalty and has as main components brand authenticity and brand self-congruence (Chen, Zhou, Zhan & Zhou, 2020; Huerta-Álvarez, Cambra-Fierro, & Fuentes-Blasco, 2020; So et al., 2016). The first refers to the necessity of presenting authentic (i.e. credible, honest, symbolic, faithful) experiences to visitors, while the second refers to the harmony between destination image and consumers' expectations (Huerta-Álvarez, Cambra-Fierro, & Fuentes-Blasco, 2020).

The growth of social media as a form of communication and promotion of destinations led to a decrease in the importance of traditional communication instruments (Huerta-Álvarez, Cambra-Fierro, & Fuentes-Blasco, 2020). Social media increases brand engagement and brand equity because of its widespread acceptance, accessibility, and higher degree of confidence among users. In addition, it allows users to publish and share content, both positive and negative, influencing this way the general opinion and brand reputation (Huerta-Álvarez, Cambra-Fierro, & Fuentes-Blasco, 2020; Gómez, López, & Molina, 2019).

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Social media allows destinations to have access to the global tourism market at relatively low costs, facilitating this way the positioning of the destination (Huerta-Álvarez, Cambra-Fierro, & Fuentes-Blasco, 2020).

Loyal customers are also a great source of promotion as they spread positive word-of-mouth and often recommend the destination to potential visitors using social media. Destinations should develop their own platforms, sites, and social networks and use them to share and promote e-word-of-mouth from loyal tourists (San Martín, Herrero, & García de los Salmones, 2019; Jovicic, 2019).

1.3. Consumer Behavior

Consumer behavior plays an important role in the formation and implementation of destination strategies, particularly their attitudes to the uncertainty and risks associated with crises and disasters (Senbeto & Hon, 2020; Floyd, Gibson, Pennington-Gray, & Thapa, 2004; Hon, Bloom, & Crant, 2014). As a result, it is essential to identify the consumers that are more risk-averse in order to properly implement recovery marketing strategies (Mair, Ritchie & Walters, 2016; Hajibaba, et. al, 2015). In this line of thought, Hajibaba, et. al (2015) suggested that crisis-resistant tourists are young with high spending power, involved in the travel planning process, social media users that are motivated to travel by opportunities related to sports and health, and actively engaged in nature activities.

Economic crises are usually more debated due to socio-economic issues such as unemployment, reduction of discretionary income that lessen travelling capabilities, price elasticity, and less diversified consumption patterns (Papatheodorou & Pappas, 2017; Senbeto & Hon, 2020; Yang & Chen, 2009). Hence, some authors suggested that the unpredictability of having a stable income vastly impacts consumers' decision to travel (Senbeto & Hon, 2020; Kozak et al., 2007).

Song et al. (2011), pointed out that after economic crises consumers prefer less expensive accommodations, Sönmez and Graefe (1998) suggested that older travelers are less impacted by economic crisis, whereas Bronner and de Hoog (2014) stated that there is almost no relation between the economic situation of a destination and its tourist demand.

During health crises, consumers' concern with safety and security escalates and so does their anxiety and uncertainty. In these crises, consumers often try to avoid mass tourism and overcrowded destinations, become more collectivistic and prefer to travel to

domestic destinations (Senbeto & Hon, 2020; Yang & Chen, 2009; Cashdan & Steele, 2013; Zenker & Kock, 2020; Wang & Ackerman, 2019).

In addition, health crises are often associated with economic crises, since they usually culminate in unemployment, layoffs, or reduction of tourism activity. Thus, crises in tourism are usually related to economic, socio-cultural, environmental, and political issues (Senbeto & Hon, 2020; Zenker & Kock, 2020; Chen, 2011).

Consumers' behavior and perceptions are dependent on the type of crisis, the purpose of visit, and consumption patterns (Senbeto & Hon, 2020). Lepp and Gibson (2003) indicated that women are more sensitive to health-related crises. Fuchs and Reichel (2011) complemented suggesting that first-time visitors are impacted by such crises, while frequent visitors and long-distance travelers are more vulnerable to economic crisis. In both types of crises, fewer visitors and a shorter duration of stay suggested higher levels of uncertainty during crises (Lepp & Gibson, 2003; Fuchs & Reichel, 2011).

Senbeto and Hon (2020) studied the implications on consumer behavior, especially in the purpose of visit and consumption patterns, before (pre-crisis), during (crisis) and after crisis (post-crisis) and suggested that before tourists recognize a crisis, destinations should provide accurate information to form positive perceptions and decrease uncertainty. Tourists' perception of how a crisis occurs and how it is managed affects their behavior and plays a critical part on their decision-making process (Floyd et al., 2004).

After consumers accept a crisis existence, they generally cancel their travel plans. However, there are some segments that are not as concerned with crises and choose to travel anyway (Hajibaba, Gretzel, Leisch, & Dolnicar, 2015).

Ghaderi (2015) pointed out that visiting friends and relatives is less impacted during crises because tourists perceive it as part of social commitment. Thus, and according to Mair, Ritchie, and Walters (2016), visit friends and relatives can be a strategy for destinations to recover from a crisis.

Post-crises do not always have the same consequences thus, DMOs should focus on diminishing the perceived negative effects of crises in order to positively influence tourists' behaviors and perceptions on the destination (Senbeto & Hon, 2020).

Safety plays a strong role in tourism demand during crises and disasters. Thus, destinations should implement measures that increase visitors' perceptions of safety and reduce uncertainty (Senbeto & Hon, 2020; Lepp & Gibson, 2003).
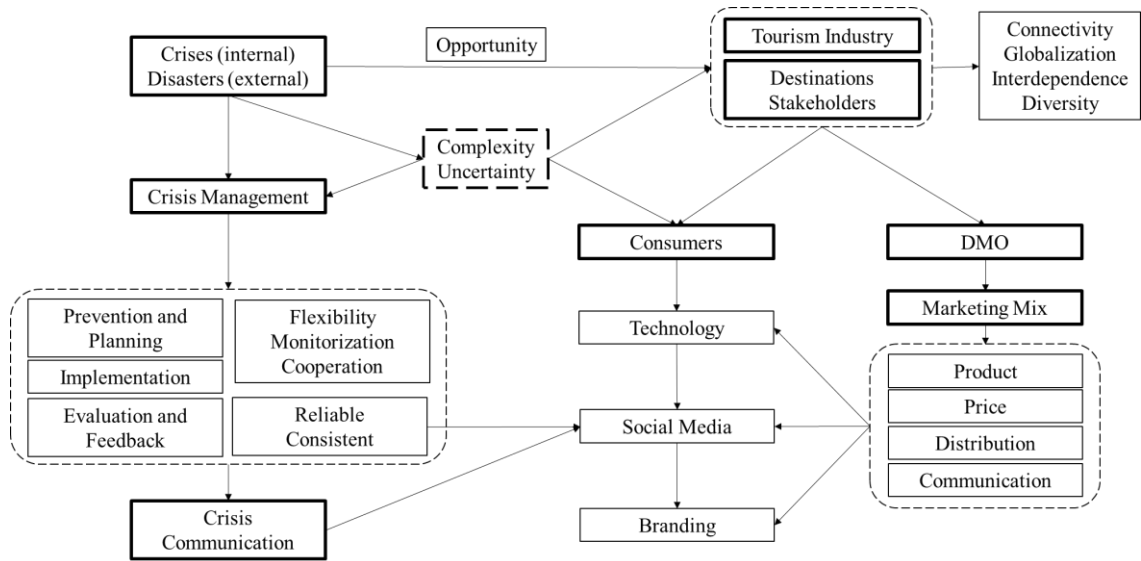
1.4. Conceptual Framework

Figure 1.3 - Theoretical Conceptual Framework

2. Market Analysis

2.1. PESTEL Analysis

2.1.1. Political and Legal Factors

Stability is the word that characterizes the current political environment in Portugal. The last political stability index (-2.5 weak; 2.5 strong) confirmed it (see Figure 2.1), since Portugal, in 2018, had 1.14 points in the index. For comparison, the world average in 2018 based on 195 countries was -0.5 points. As far as the Portuguese corruption perception index (100 = no corruption) that measures the perception of the public sector corruption, in 2019, it was 62 points (see Figure 2.2), while the average for the European Union in the same year was 63 points (TheGlobalEconomy.com, 2020).
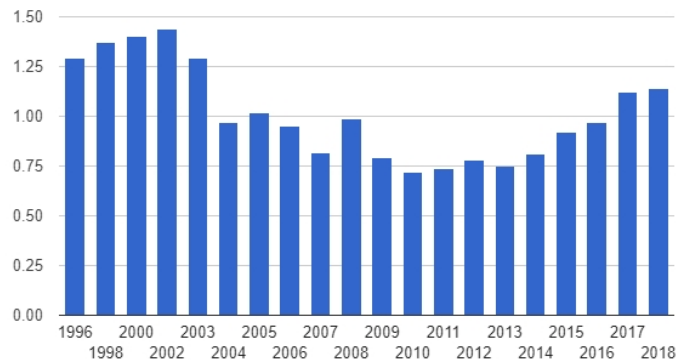
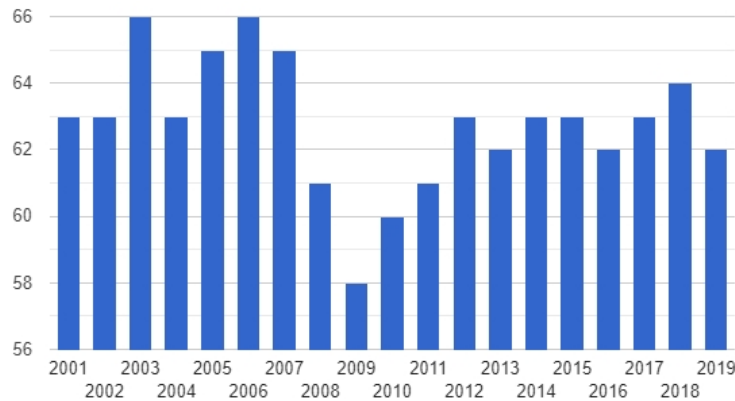Figure 2.1 – Political Stability Index, Portugal (TheGlobalEconomy.com, 2020)

Figure 2.2 – Corruption Perception Index, Portugal
(TheGlobalEconomy.com, 2020)

Regarding freedom and liberties, in 2020, Portugal registered a press freedom index of 11.83 (see Annex B) which is a considerable improvement from 2013 (16.75). This index demonstrates the plurality and independence of the Portuguese media (Johnson, 2020). Moreover, in 2020, Portugal recorded a business freedom index (see Annex C) of

77 points and a labor freedom index (see Annex D) of 44 points that reflect the overall burden and the inflexibility of regulations for organizations. On the other hand, the trade freedom index (see Annex E) was 86 points demonstrating the absence of tariffs and other barriers that influence the international trade of goods and services (TheGlobalEconomy.com, 2020).

The Portuguese government published in 2018 the Law No. 62/2018 that makes the second amendment to Decree-Law No. 128/2014, which approves the legal regime of operation of local accommodation establishments. This amendment changes the definition of local accommodation establishments to a broader concept that includes any type of establishment that sells temporary accommodation upon a monetary exchange. Hence, "bedrooms" are now part of a new modality of local accommodation. In addition, the maximum capacity for local accommodations, with the exception of "bedrooms" and hostels, is 30 people (Law No. 62/2018).

Due to the current pandemic, the Portuguese Government approved new tax and contributory measures to aid companies and workers that include the deferral of tax obligations (CIT, SIT, VAT, SCI/AD, and Stamp Duty) and a new deferred payment regime for social contributions. In addition, the government launched the Economic and Social Stabilization Program to answer the difficulties caused by the Covid-19 pandemic, such as more access to financing mechanisms for micro-companies (Decree-Law No.10-F/2020; Rectification Statement No. 13/2020).

The Portuguese government implemented restrictions for tourists outside the European Union and Schengen Area (and Australia, China, South Korea, Japan, New Zealand, Rwanda, Thailand, and Uruguay) who are only allowed to enter the country for essential travel (European Union, 2020).

2.1.2. Economic Factors

The International Monetary Fund predicted, in 2020, a decline in Portugal's GDP of 8% (see Figure 2.3) mostly due to the covid-19 pandemic. However, in the following year the institution predicts a positive variation of 5% (IMF, 2020). Portugal's economic growth is following the global trend. The IMF projected a world economic growth of 4.9% (see Figure 2.4), in 2020, with a recovery in the following year of 5.4%. The institution assumed the need to be cautious due to the current uncertainty that is dependent on the duration of the pandemic and consequential lockdowns that will affect consumption and unemployment rates, among other factors (IMF, 2020).
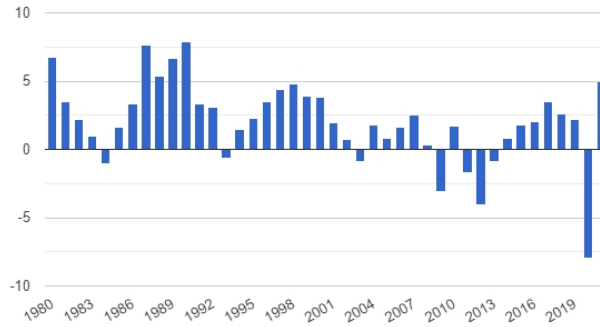
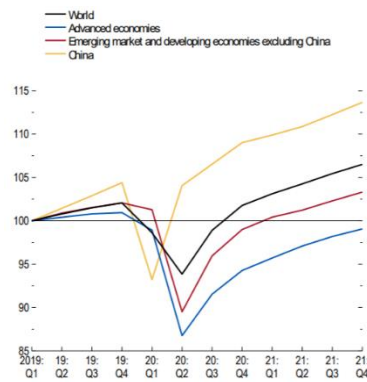Figure 2.3 - Economic Growth, Portugal (IMF, 2020)

Figure 2.4 - World Quarterly GDP (IMF, 2020)

The IMF reported that the Portuguese unemployment rate (see Figure 2.5) will more than double to 13.9% in 2020, after consecutive years of decline (IMF, 2020). In addition, there was a slight increase in consumer prices (see Figure 2.6) in June 2020 (0.2%), after a 0.7% decline in the previous month (Trading Economics, 2020).
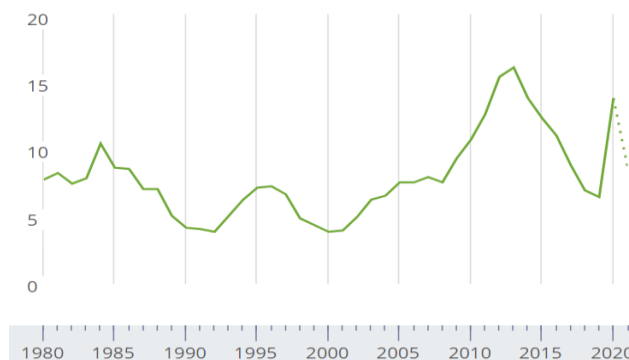

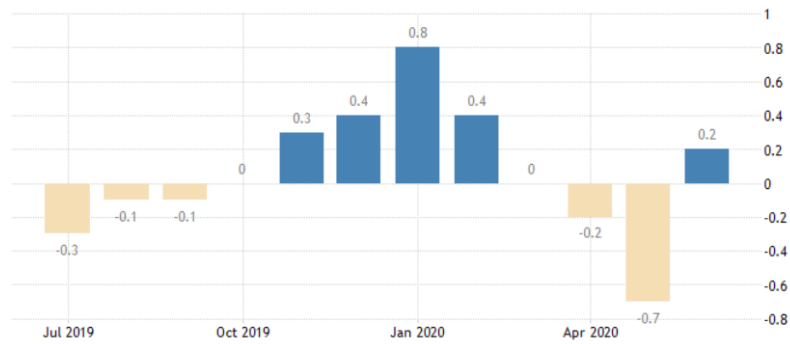Figure 2.5 - Unemployment Rate Prediction, Portugal (IMF, 2020)

Figure 2.6 - Inflation Rate, Portugal (Trading Economics, 2020)

The Portuguese medium disposable income dropped with the pandemic around 5.3% (see Annex F). This decrease considers the measures taken by the Portuguese government. Before the pandemic the medium disposable income of Portuguese families was 1566€ per month. After the crisis it dropped to 1482€. Overall, the younger generation is the most affected by the pandemic while public sector workers and older generations were the least affected by the crisis (Varzim, 2020). Consequently, consumer spending in Portugal (see Figure 2.7) decreased in the first quarter of 2020 (Trading Economics, 2020).
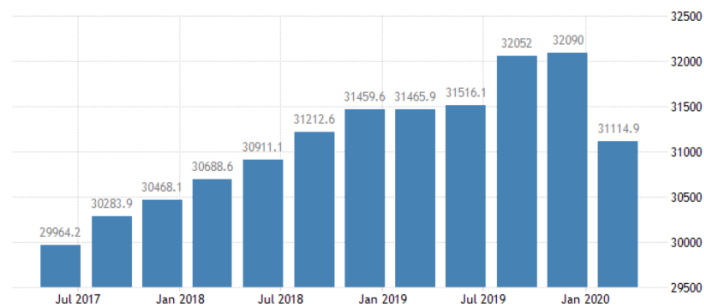

Figure 2.7 - Consumer Spending, Portugal (Trading Economics, 2020)

In 2019, Portugal was the 34th most competitive nation in the world on the global competitiveness report published by the World Economic Forum (2020).

2.1.3. Sociocultural Factors

The total population of the world is increasing with the age group comprising people over 65 being the one with the highest increase rate (see Annex G). In Europe, on the other hand, the scenario is different with total population decreasing almost 100million people in 50 years. In this region, the age group comprising people between 25 and 64 years old will be the one to register the biggest drop, while the 65 plus will register an increase in

population (see Annex H). In Portugal, the situation will be similar to Europe with an overall decline in population in all age groups (see

Annex I) but the 65 plus that will register an increase in population (United Nations, 2020).

The United Nations predicted that by 2050, 68% of the world population will live in cities (see Figure 2.8). In Portugal and Europe, the situation will be similar with more than half of the population living in urban areas (United Nations, 2020).
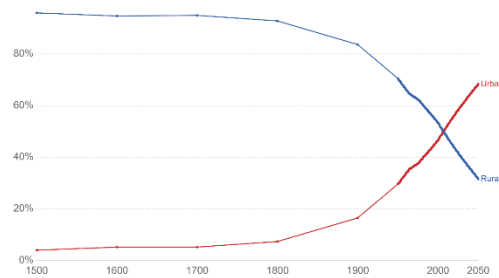

Figure 2.8 - Urbanization Prospects, World (United Nations, 2020).

Europe remains the most peaceful region in the world, although it recorded a slight deterioration in peacefulness. The continent is home to 13 of the 20 most peaceful countries, with only two European countries not being ranked in the top half of the index. Iceland remains the most peaceful country in the world, a position it has held since 2008. It is joined at the top of the index by New Zealand, Austria, Portugal, and Denmark (Institute for Economics & Peace, 2020).

The Institute for Economics and Peace considered that Portugal has a strong positive peace index but a less favorable economic situation pre-crisis, suggesting that economic management should be the focus in the recovery instead of social matters and institutional development (Institute for Economics & Peace, 2020).

Portugal is considered by InterNations the friendliest country towards foreign residents, with almost 80% of foreign residents considering the Portuguese people welcoming (InterNations, 2020).

The Portuguese consumers' confidence index (see Figure 2.9) recorded its biggest drop in April 2020. However, it is in place to recover in hand with the pandemic (The Global Economy, 2020).

Figure 2.9 - Consumer Confidence Index, Portugal (The Global Economy, 2020)

Consumer sentiment around the world is changing due to the pandemic. Most consumers are expecting long-lasting impacts from covid-19 and are especially pessimist with an economic recovery. Thus, consumers are spending less on non-essential goods and services. In addition, the intent to travel remains low across several countries. Consumers pretend to have reassurance from governments and medical authorities as well as the implementation of visible safety measures (McKinsey & Company, 2020).

Specifically in Portugal, consumers show more uncertainty than pessimism in the country's economic recovery as well as more mindfulness of how they spend their money. Portuguese consumers show particular awareness on activities such as travelling and gathering in crowded spaces (see Figure 2.10) and are adopting more sustainable behaviors in their purchasing decisions (McKinsey & Company, 2020).
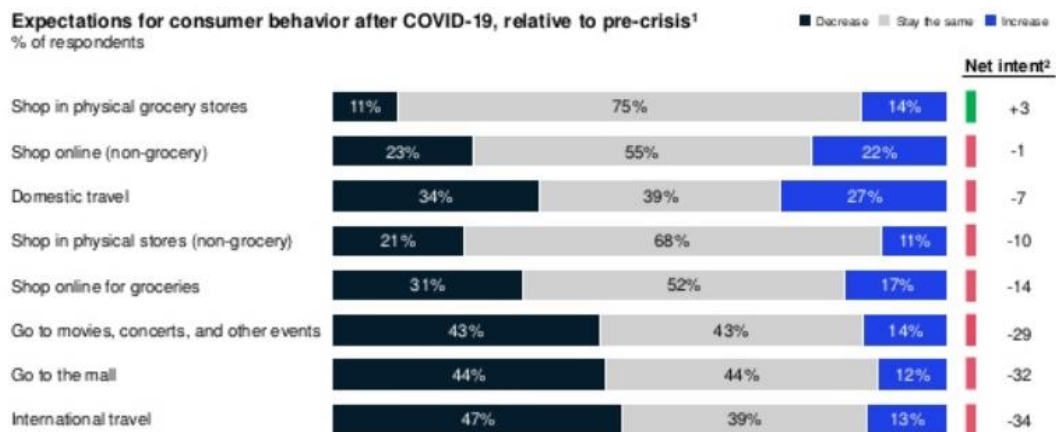

Figure 2.10 - Consumers behavior after COVID-19, Portugal

(McKinsey & Company, 2020)

The Portuguese tourism authority, Turismo de Portugal, launched the "Clean & Safe Stamp" that informs tourism companies about all hygiene measures necessary to comply with health regulations. In addition, it recognizes all tourism organizations that comply with health and safety recommendations issued in accordance with the National Health Authority guidelines. This label valid for one year promotes the country as a secure destination, reinforcing consumers' confidence (Turismo de Portugal, 2020).

Portugal is also the first country in Europe to be recognized with the "Safe Travels" badge approved by the World Travel and Tourism Council (Turismo de Portugal, 2020).

2.1.4. Technological Factors

Cities are facing new challenges regarding urbanization. So, it is necessary to find ways to prevent problems like overpopulation and lack of resources. This is where smart cities are important because they allow to improve the efficiency of the city, as well as, its long-term sustainability. There are already a few examples around the world that have embraced this trend such as Barcelona and Singapore (Deloitte, 2020).

A smart city is a designation given to a city that incorporates information and communication technologies (ICT) to enhance the performance of the city, quality of life of its citizens, and environment. With smart cities, residents' quality of life and the city's economic competitiveness improve. Being a good steward of the environment and promoting sustainable consumption of natural resources is part of the overall smart city vision (Deloitte, 2020).

In addition, the growing importance of mobile technology, the development of 5G networks, and big data provide better foundations for IoT (Internet of Things), recognition technology, virtual reality, augmented reality, robotics, and artificial intelligence. IBM estimated that 90% of the existing data was created in the last two years. All of this technology is necessary to develop better experiences for consumers with more personalization and to have more efficient resource management (Revfine.com, 2020; Vidal, 2019; IBM, 2020).

SMIITY – SMart Interactive cITY is a free mobile application for citizens and tourists that provides information on news, events, trails, points of interest, social media and contacts of 49 Portuguese destinations, but it doesn't include Sintra. The application provides specific and contextual content when a user is nearby a beacon (e.g. point of interest, trails) and allows users to buy tickets for cultural, sports and other types of events. Users can access it without internet connection by downloading all the content ahead. In addition, it includes an augmented reality feature of nearby points of interest,

and gives real time information about the air quality, noise impact and other environmental data. It was rated the Best App Touristic Guide 2018 by Fitur, and Wireless Forum Top Innovators 2018 by Wireless Technology Forum (SMIITY, 2019).

In 2020, 59% of the world population uses the Internet and 49% are social media users, most of them via mobile devices. This is an increase of 9% since the last year. The most popular and fastest growing social platforms are Facebook, followed by YouTube and WhatsApp (see Figure 2.11). Facebook and Instagram (see Annex J) are particularly effective in marketing to millennial and Gen Z groups (Chaffey, 2020).
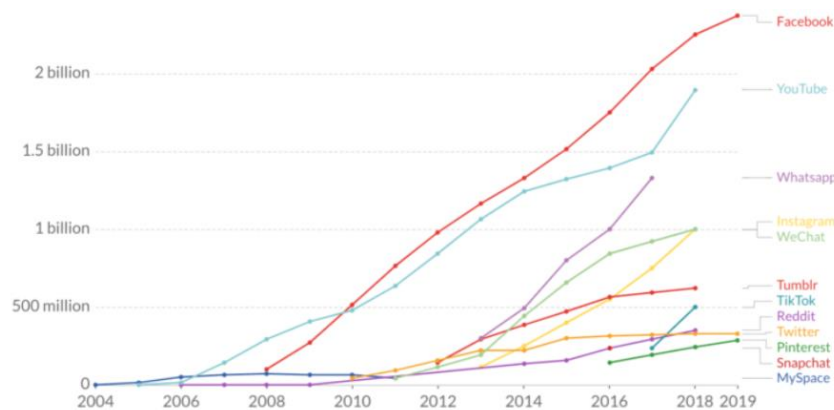

Figure 2.11 - Number of people using social media platforms (Chaffey, 2020)

Social media is gaining importance in consumers' decision-making process, mostly because of user-generated content. 86% of people said that they have become interested and 52% made plans to visit a destination after seeing user-generated content on social media platforms. In this regard, user-generated content is much more likely to make users more interested in visiting a specific destination than professional, and celebrity or influencer content (see Figure 2.12). Finally, 89% of consumers said that they would post a positive travel experience of a destination (Macdonald, 2019).
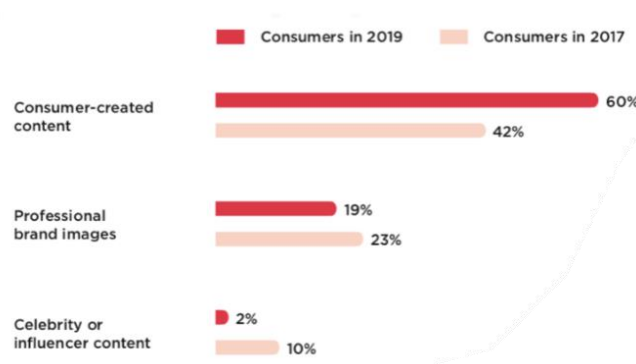

Figure 2.12 - The most influential content to consumers when planning their travel
(Macdonald, 2019)

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Social media is now driving trends and consumers' experience on travelling, with 30% of consumers visiting a destination based on its capacity to impress on social media (Corcoran, 2017).

According to a study conducted by IPDT, 90% of tourists visit the website and social networks of the destination before visiting it, and 80% choose the destination based on online comments and ratings of other visitors. Finally, 30% of tourists now have in account the "instagramability" factor of a destination to visit it (IPDT, 2020).

2.1.5. Environmental Factors

The United Nations' sustainable development agenda (see Annex K) adopted in 2015 by all UN members aims to decrease the growing poverty, empower women and girls, and address the climate emergency. In this particular, 2019 was the second warmest year ever on record and the last decade (2010-2019) was the warmest ever recorded. Climate change affects every country and it is negatively impacting economies and lives directly by changing the weather of destinations and indirectly with loss of biodiversity, increase of natural disasters, costal erosion, worse tourist mobility due to restrictive mitigation policies, political instability, social unrest, and internal and external security risks (United Nations, 2020).

In accordance with UN goals, the Portuguese national authority for tourism considered sustainability a principal goal in its 2027 tourism strategy. According to Turismo de Portugal, the tourism industry can contribute to achieve all the goals but can have special impact on goals 8 ("decent work and economic growth"), 12 ("responsible consumption and production") and 14 ("life below water") that are related to the sustainable and inclusive economic development, the sustainable consumption and production, and the sustainable use of oceans and maritime resources (Turismo de Portugal, 2020).

In addition, the organization aims to promote tourism as a catalyst for economic, social and environmental development as well as to promote Portugal as one of the most competitive and sustainable destinations in the world. In this matter, Turismo de Portugal established strategic partnerships with entities in the fields of culture, environment, transports, internationalization. The organization aims to create a network of regional observatories for sustainable tourism. The first opened in 2018 in Alentejo, and in 2020 two opened in Azores and Algarve (Turismo de Portugal, 2020). Portugal is the European country with the most observatories and third in the world behind China with 9, and Indonesia with 5 (United Nations, 2020).

The Bike Friendly Index is an index that measures (out of 10) the friendliness of a destination in the use of bicycles as a mean of urban transportation. It utilizes five key dimensions in its evaluation that include the slope, built environment, cycling infrastructure, political commitment, and use of bicycles. In 2018, the national average of the Bike Friendly Index was 2.3, with Sintra, Lisbon and Cascais (see Figure 2.13) reporting indexes of 3.22, 5.84, and 3.76, respectively (Bike Friendly Index, 2018).
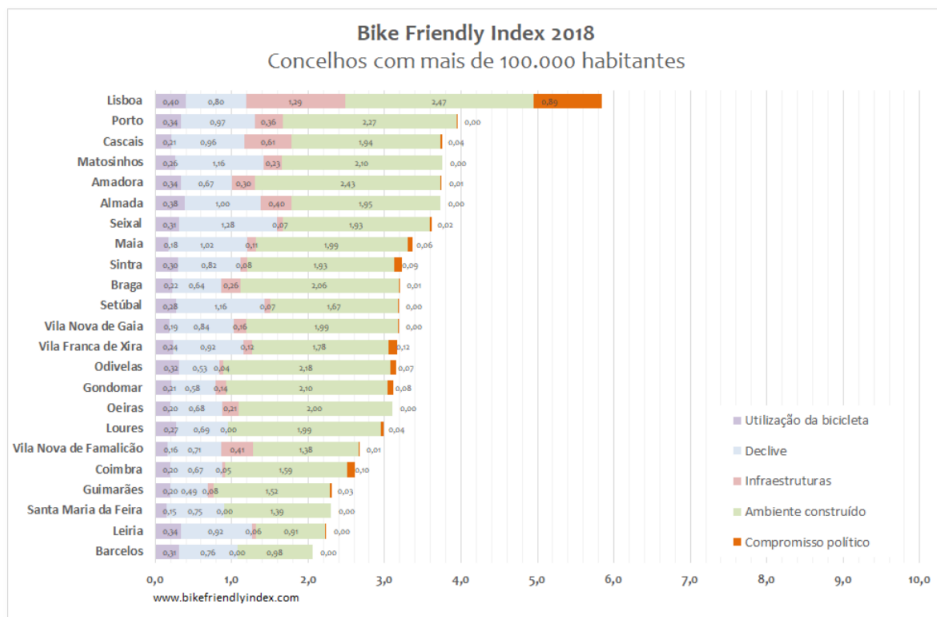

Figure 2.13 - Bike Friendly Index 2018 (Bike Friendly Index, 2018)

2.2. Tourism Industry Analysis

2.2.1. The World, Europe and Portugal

The tourism industry is of extreme importance to the world economy representing in 2019 7% of total exports worldwide. It is also an industry with an average annual growth of 5% over the past 10 years. Similarly, in Europe, the tourism industry represented in 2019 6% of total exports with an average annual growth of 5% over the past decade (World Tourism Organization, 2020).

The world tourism industry registered a steep decline in 2020 due to the impact of COVID-19. International tourist arrivals decreased 44% in the first third of 2020 comparing with the homologous period of 2019 (see Figure 2.14). This pandemic had the most impact in Asia and the Pacific that registered a 51% decrease in arrivals between January and April, followed by Europe (- 44%), Middle East (-40%), the Americas (-36%) and Africa (-35%). In Europe, the Southern and Mediterranean region was the most affected with a decrease in arrivals of 52% (see Figure 2.15) when compared with the homologous period of 2019 (World Tourism Organization, 2020).

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Figure 2.14 - International Tourism, World (World Tourism Organization, 2020)
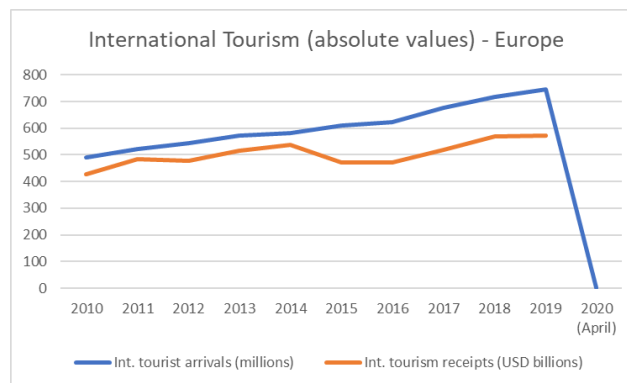
Figure 2.15 - International Tourism, Europe (World Tourism Organization, 2020)

Despite all existing difficulties caused by the pandemic, the tourism industry is displaying signs of recovery especially in the Northern Hemisphere with numerous nations lifting travel restrictions for the summer season. The WTO published several prospects (see Figure 2.16) all with a high level of uncertainty that showed a decline of 58% to 78% of arrivals in 2020, contingent on the length of travel restrictions imposed by countries (World Tourism Organization, 2020).

Figure 2.16 - International Tourist arrival scenarios for 2020
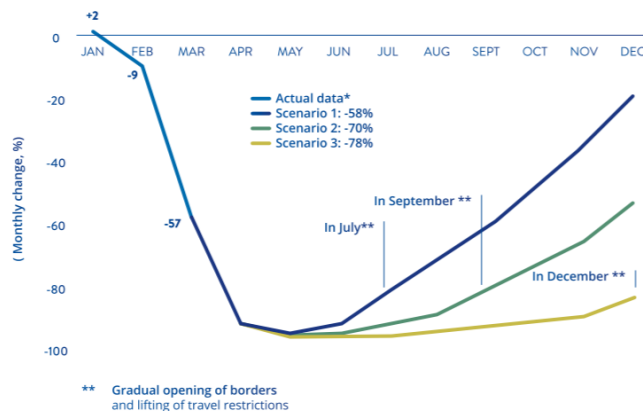
(World Tourism Organization, 2020)

The tourism industry is the largest export economic activity of Portugal. In 2019, tourism recipes represented 8.7% of the national GDP, while the industry was responsible for 19.7% of total exports and 52.3% of total services exports. In addition, the tourism industry represented 6.9% of the country's total workforce. These numbers salient the importance that the tourism industry has for Portugal (Turismo Portugal, 2020).

In 2019, there was a clear growth in tourism recipes (8.1%), total revenue (7.3%), overnight stays (4.1%), and an increase on the importance of domestic tourism with a higher growth (7.5%) than international tourism (7.1%). In this year, Portugal had 70 million overnight stays with more than half being international tourists (Turismo de Portugal, 2020), and international tourism receipts were almost 21 USD billion that represented an 8% change from 2018 (World Tourism Organization, 2020).

In the first third of 2020, the tourism industry in Portugal registered a negative variation in overnight stays of 46% when comparing with the homologous period of 2019 (see Figure 2.17), as well as a decrease in revenue of 35% in the same homologous period (see Figure 2.18). In absolute values it dropped from 16.9 million overnight stays to 9.2 million (Turismo Portugal, 2020).
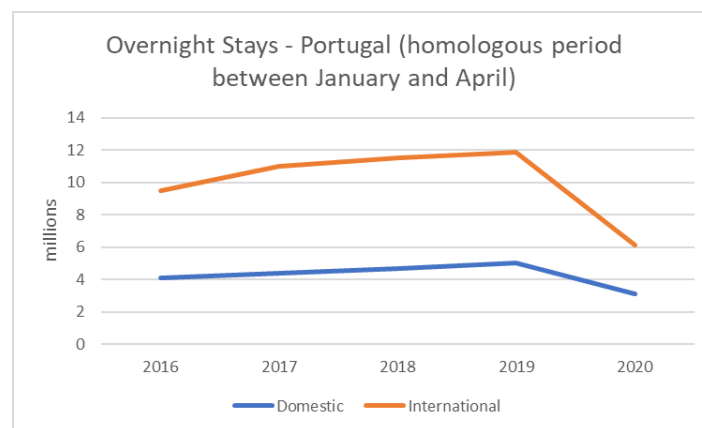

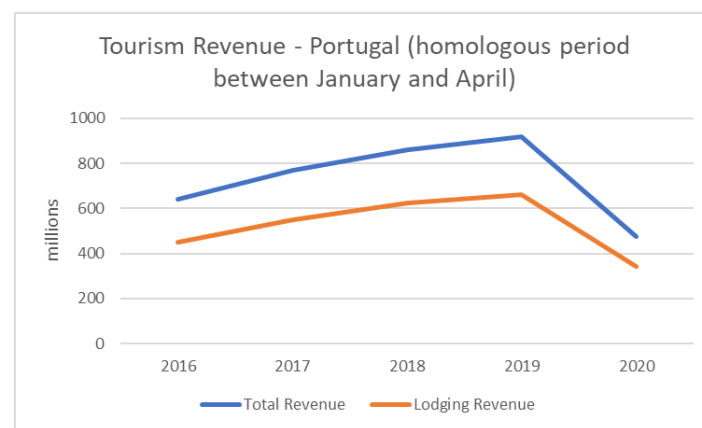Figure 2.17 - Overnight Stays, Portugal (Turismo Portugal, 2020)

Figure 2.18 - Tourism Revenue, Portugal (Turismo Portugal, 2020)

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The impact that the current pandemic is having in the tourism industry is possibly best illustrated by airline companies needing to restructure, reduce and suspend flights as well as decreasing jobs (Eurocontrol, 2020).

In April 2020, the airline industry in Europe registered a decrease of 89% over 2019 (see Figure 2.19). The impact in Portugal in the same month was over 90% (see Figure 2.20). Recovery will be faster if countries adopt coordinated measures to face the current crisis (Eurocontrol, 2020).
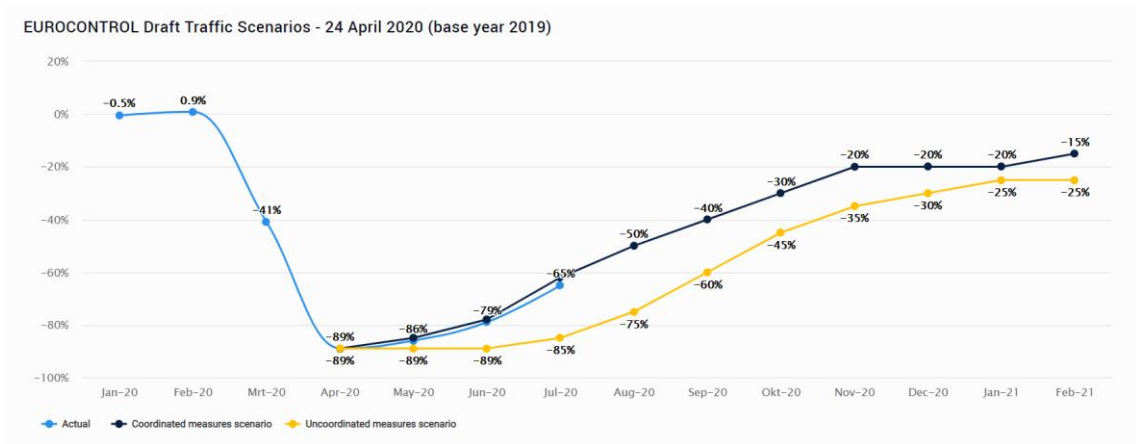
Figure 2.19 - Airline Industry, Europe (Eurocontrol, 2020)
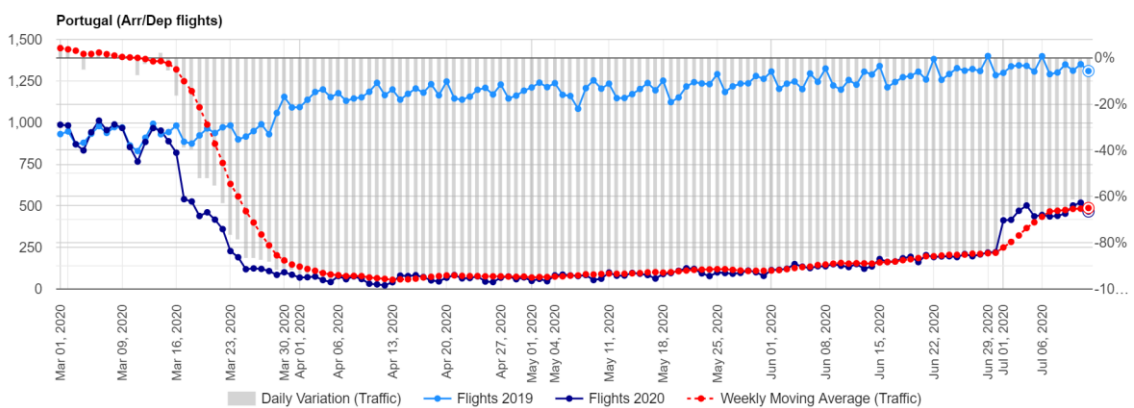
Figure 2.20 - Airline Industry, Portugal (Eurocontrol, 2020)

The occupation rate of local accommodations in Portugal in the first months of 2020 followed the trend of the previous year. However, the coronavirus outbreak drastically impacted the local accommodation market with breakdowns in occupation of almost 40 percentage points in June (see Figure 2.21). Alongside the decline in occupation, there is a significant decrease in the revenue generated in the order of 62.2% in June when compared with the homologous period of 2019 (Turismo de Portugal, 2020).
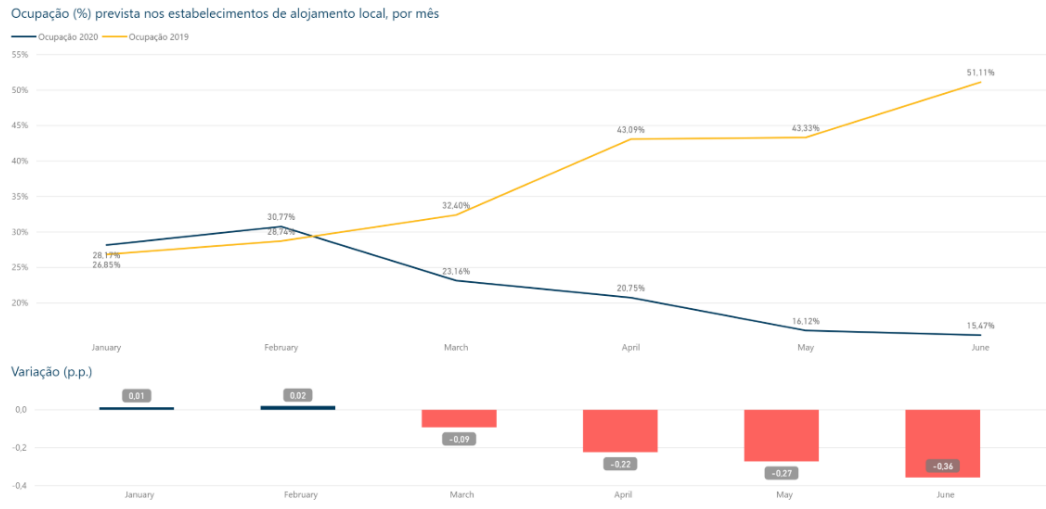
Figure 2.21 - Covid-19 Impact on Local Accommodation, Portugal

(Turismo de Portugal, 2020)

2.2.2. The Lisbon Metropolitan Area and Sintra

The Lisbon metropolitan area (AML) registered, in 2019, 18.4 million overnight stays and 343 million euros, a 5.2% and 7.2% increase over 2018, respectively. However, in the first months of 2020 there was a significant decrease in both these indicators of almost 50% (see Figure 2.22 and Figure 2.23) over the homologous period of 2019 (Turismo Portugal, 2020).
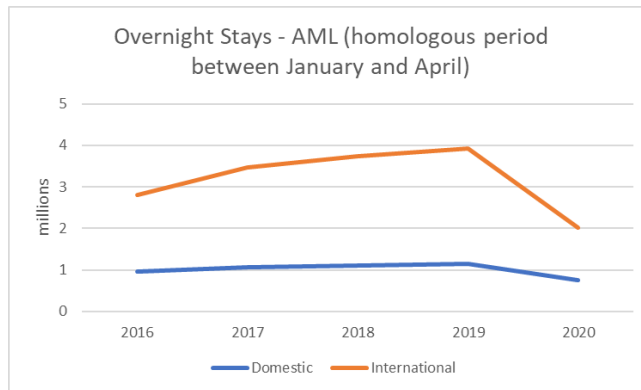
Figure 2.22 - Overnight Stays, AML (Turismo Portugal, 2020)
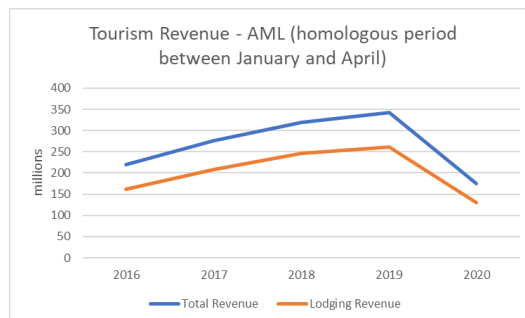
Figure 2.23 - Tourism Revenue, AML (Turismo Portugal, 2020)

Specifically in Sintra, in 2019 overnight stays increased almost 9% from the previous year (see Figure 2.24). However, in the first 4 months of 2020 (see Figure 2.25), there was a significant decrease in overnight stays of almost 50% due to the pandemic (Turismo Portugal, 2020).
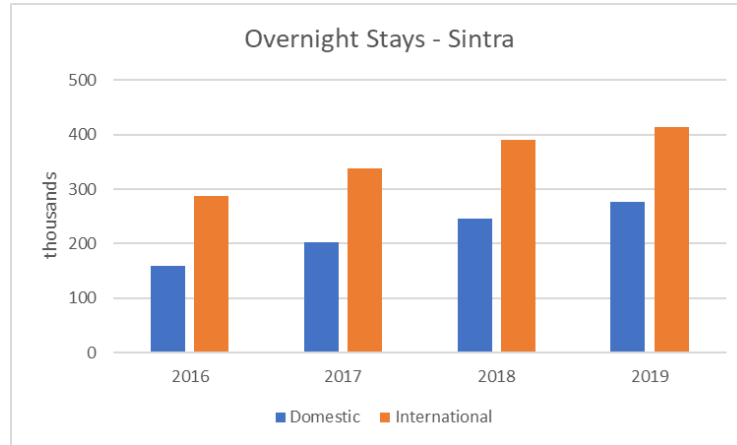
Figure 2.24 - Overnight Stays, Sintra (Turismo Portugal, 2020)
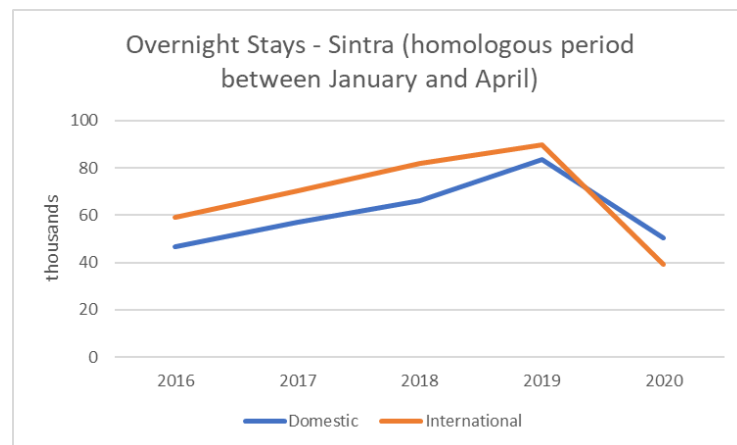
Figure 2.25 - Overnight Stays, Homologous Period, Sintra
(Turismo Portugal, 2020)

Comparing Sintra with the two biggest centralities of Lisbon metropolitan area, there is a clear discrepancy in lodging capacity despite Sintra being the second biggest municipality in the country (see Figure 2.26). This is reflected in the revenue from lodging establishments (see Figure 2.27) that represents a little over 5% of Lisbon and less than 40% of Cascais (Turismo Portugal, 2020).
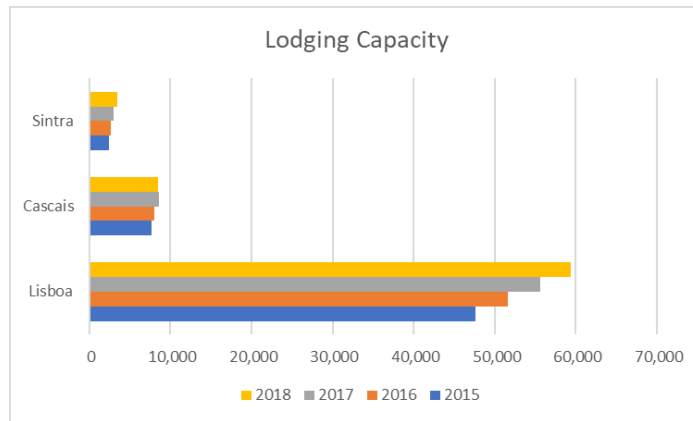
Figure 2.26 - Lodging Capacity (Turismo Portugal, 2020)
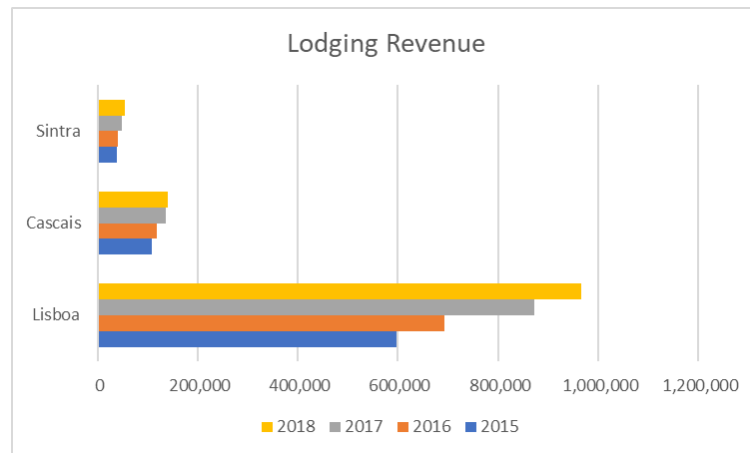
Figure 2.27 - Lodging Revenue (Turismo Portugal, 2020)

There is also a big difference in the medium length of stay in lodging accommodations (see Figure 2.28). In this aspect, Cascais is the municipality with the highest indicator in 2018 of 2.8 days, while in Lisbon was 2.4 days, and in Sintra was 1.7 days. In Sintra, the domestic tourism stayed an average of 1.4 days while international tourism stayed in average 2 days in a lodging accommodation (Turismo Portugal, 2020).
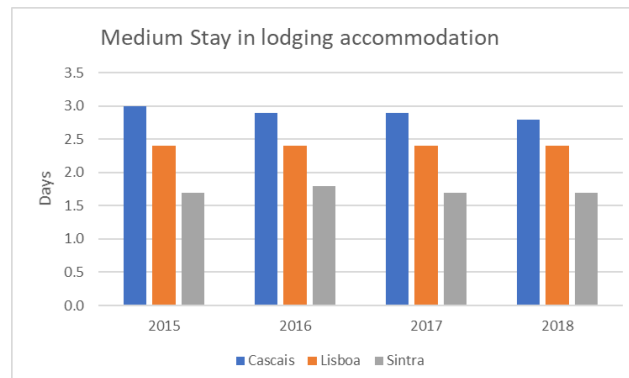
Figure 2.28 - Medium Length of Stay (Turismo Portugal, 2020)

The weight of local accommodation in the lodging scene of Sintra is increasing. In 2014, it represented 86% of lodging infrastructure and 44% of rooms, while in 2018, local accommodation represented 93% of lodging infrastructure, 68% of rooms, and was the choice of accommodation for 44% of visitors (ERT-RL, 2020).

In Sintra there is a lack of high-end accommodation options as well as restauration (see Figure 2.29). This is a factor that contributes for the low medium stay of tourists (ERT-RL, 2020).
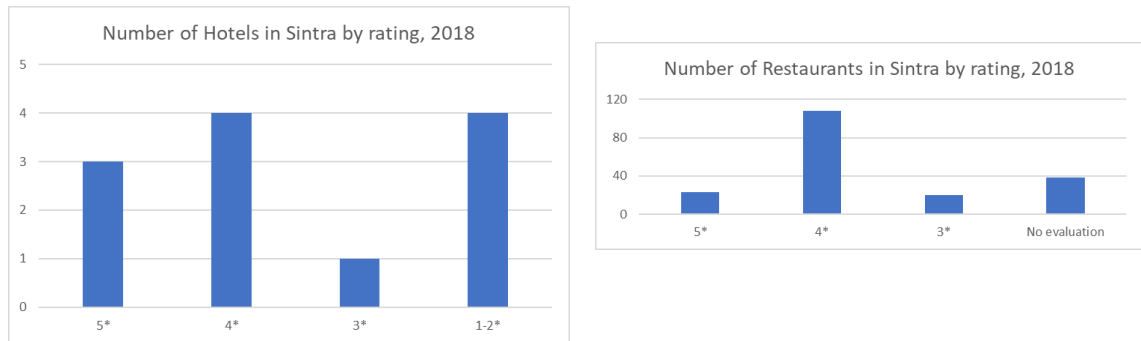
Figure 2.29 - Number of Hotels and Restaurants by Rating, Sintra, 2018

(ERT-RL, 2020)

2.3. Benchmark Analysis of Tourism and COVID-19

The following benchmarking was completed resorting to a study conducted by the World Tourism Organization on how different countries are managing the crisis that the tourism industry is facing (World Tourism Organization, 2020). Next, are the best practices to support and recover the tourism industry from a crisis and examples of countries that implemented them:

- Creation of internal crisis mechanisms such as National Coordination Committees and digital communication channels (France, Ecuador, Algeria, Bangladesh, Malaysia, Singapore, Greece);
- Diffusion of informational campaigns, industry reports, forecasts, and surveys to all stakeholders (Germany, Thailand, Peru, Poland, Colombia, Australia);
- Development of health and hygiene protocols, regulations, certifications, guidelines, and labels for the tourism industry (Spain, Costa Rica, Ecuador, Albania);
- Offer of vouchers for events, trips and travel packages that were cancelled due to the COVID-19 crisis (Belgium, Croatia, Denmark, France, Italy);
- Development of digital documentation such as digital immunity passports (Estonia);

- Promotion of domestic travel through holiday vouchers (Italy, Iceland, Lithuania);
- Domestic tourism promotion, marketing campaigns and local engagement (Georgia, Hungary, Iceland, Mexico, New Zealand);
- Digital transformation of the tourism sector (Singapore);
- Virtual tourism campaigns (Fanthorpe, 2020):
    - #GrenadaDreaming (Grenada)
    - Bristol from Home (Bristol, UK)
    - Dubai 360 (Dubai, UAE)
    - Long Distance Love (Croatia)
    - #Greecefromhome (Greece)
    - Portal AR (Scotland)
    - #AustrianHomeStories (Austria)

2.4 Tourism and Consumer Behavior Trends

Secondary destinations will be more popular as consumers will want to explore less touristic and more sustainable destinations for the environment and the local community. There is a larger demand for short breaks and regional trips. Consequently, green (i.e. sustainable) tourism, nature tourism, and adventure tourism will increase as will enotourism and industrial tourism (McKinsey & Company, 2020; ERT-RL, 2020; Annex L). Turismo de Portugal developed a Wine Tourism Action Program to promote the country as a wine tourism destination as well as its wine tourism assets (Turismo de Portugal).

Consumers are looking for more authentic destinations and customizable experiences, they want to explore new cultures, gastronomies, and traditions. The personalization of experiences and the inherent requirement of improving local communities' quality of life will increase the adoption of technology and the implementation of smart cities and smart tourism strategies (IPDT, 2020; Deloitte, 2020; Annex L).

Creative tourism will be more sought after. This modality of tourism is not limited to tangible products such as museums, natural resources, and monuments, but also valorizes intangible assets such as lifestyle, identity, people connection, and environment. This is a form of tourism in which the visitor is directly involved with the local community and in the co-creation of the experience (IPDT, 2020).

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Having social networks and websites that are also adapted to mobile devices are of increasing importance because customers are looking for simple, appealing, and attractive information in the form of digital platforms (Macdonald, 2019). In addition, the "Instagram" factor will be key for choosing the next destination (Corcoran, 2017).

Due to the current pandemic, consumer behavior will change to seek for higher hygiene and security standards, more concise and reliable information regarding security challenges, and preventive measures, as well as more flexibility in choosing a destination (McKinsey & Company, 2020; Annex L).

2.5. Competition Analysis

2.5.1. International Competition

➢ Watchau Valley

The Wachau Valley, in Austria, is a cultural landscape by UNESCO located an hour by car or train from Vienna. It is a stretch of the Danube valley between Melk and Krems with both cities having train stations and the last one the possibility to visit by boat. The Wachau Valley is a popular destination due to the nature landscapes, rich gastronomy, wines, and old towns (Krems and Melk) with historic monasteries, castles and palaces. Visitors usually stay for short-duration trips to enjoy the vast biking paths along the river. The Wachau Valley provides a diverse set of accommodation options from luxury hotels (with golf courses and spas) to local housing. The Wachau Valley (see Figure 2.30) doesn't have a designated DMO with most of the information and communication coming from the Austrian Tourism Office (Austrian Tourism Office, 2020).

Figure 2.30 - Austrian Tourism Office Logotype (Austrian Tourism Office, 2020)

➢ Hallstatt

Hallstatt is a small village on the Hallstatt lake in Austria that has a cultural landscaped listed as UNESCO World heritage site. It is famous for the world oldest salt mine, its caves and glaciers. It is a popular destination for visitors interested in culture and nature with numerous opportunities for outdoor sports, from walks, to rock climbing, biking and kayaking. In terms of lodging, local accommodation is the most common type offered in Hallstatt with sparse options of luxury hotels. This village is also known for its gastronomy, especially the quality of the fish from the local lake and rivers. Hallstatt (see

Figure 2.31) has its designated information and communication platform, as well as the social media platforms Twitter, Facebook, and Instagram (Hallstatt, 2020).

Figure 2.31 - Hallstatt Logotype (Hallstatt, 2020)

➢ Dordogne Valley

The Dordogne Valley, a UNESCO World Heritage Site in France, has a rich cultural and natural heritage that offers something for everyone. From its several gardens, castles and fortresses to historical villages and art. It is a destination for nature enthusiasts due to its UNESCO Biosphere Reserve and the Nature Park, several prehistoric caves, lakes, waterfalls, and a river for canoe trips under cliff-top gardens. It has numerous viewpoints of the landscape and that also serve astronomic purposes. The Dordogne Valley has a rich gastronomy that includes beers, spirits and wines from the region, the famous French cheeses, truffles, veal and quercy lamb, and vast strawberry fields. This region has its own DMO (see Figure 2.32) that provides the majority of information. It communicates with tourists mainly through social media platforms such as Instagram, Facebook, and YouTube (Visit Dordogne Valley, 2020).

Figure 2.32 - Dordogne Valley Logotype (Visit Dordogne Valley, 2020)

➢ Mullerthal Region

The Mullerthal region, in Luxemburg, is often called Luxemburg's little Switzerland due to its hilly landscape that provides a diverse natural and geological heritage perfect for hiking, biking, water sports, rock climbing, horseback riding and golf. The Nature Park of the Mullerthal region is also a Geopark that reflects the importance of preserving a UNESCO Global Geopark. In addition to its natural heritage, the Mullerthal region offers its visitor several castles and museums of the region, as well as, a large set of lodging options (e.g. local accommodations, family-run hotels, camping, hostels, and

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B&B) and a vast gastronomy history complemented by several restaurants. This region has its own DMO (see Figure 2.33) that provides the majority of the information and communication through social media platforms like Facebook and Instagram (Mullerthal, 2020).

Figure 2.33 - Mullerthall Logotype (Mullerthal, 2020)

2.5.2. Domestic Competition

➢ Alcobaça

Alcobaça is a municipality located in central Portugal most famous for the country's largest church, the Monastery of Alcobaça, that is a UNESCO World Heritage Site. In addition to this monastery, there are several other cultural attractions such as museums, castles and other monasteries. In terms of natural heritage, the Serra de Aire and Candeeiros Natural Park is the main attraction, but there are several other natural parks and gardens that allow visitors to practice outdoor sports. The municipality has a rich gastronomy and confectionery that were influenced by the presence of monks, as well as arts, pottery and printed cotton. Alcobaça is also the home of excellent beaches and golf courses, as well as events and festivals. The website of the municipality of Alcobaça (see Figure 2.34) is the main source of tourism information and a provider of several tourism circuits (e.g. rural tourism and religious tourism) (Autarquia Alcobaça, 2020).

Figure 2.34 - Alcobaça Logotype, (Autarquia Alcobaça, 2020)

➢ Arcos de Valdevez

Arcos de Valdevez is a municipality in the north of Portugal located in the Minho province. It retains much of the typical charm due to its traditional architecture (manor

houses) and green landscape. The main attractions of this destination are nature tourism with the Peneda-Gerês national Park, the Open Water Museum of Rio Vez, numerous viewpoints of the municipality, several trails and routes to enjoy on foot, by bicycle or canoe, wine tourism, cultural tourism with the Baroque-CIB Interpretive Center, Giela's Palace and places like Serra do Soajo and the Village of Sistelo. Arcos de Valdevez also has a rich local gastronomy and confectionery as well as several events and festivals. The most traditional type of lodging is in the form of rural accommodation. The municipality of Arcos de Valdevez (see Figure 2.35) is the main provider of tourism information through a designated tourism website and social media such as Facebook, Instagram, Twitter and YouTube (Visit Arcos, 2020).

Figure 2.35 - Visit Arcos Logotype, (Visit Arcos, 2020)

➢ Serra da Estrela and Beiras Region

The region of Serra da Estrela and Beiras is an intermunicipal community between 15 municipalities in the center of Portugal. This region has unique landscapes that allow for outdoor and water sports year-round. It has a vast cultural and historical heritage with the typical gastronomy, wines, castles and historical villages such as Belmonte and Almeida. In addition, there are several spas and wellness centers for visitors who want to relax from the city life. The region of Serra da Estrela and Beiras is the home of several fluvial beaches, golf courses, events and festivals. There is a vast offering of lodging options from hotels and camping parks to local and rural accommodations. This intermunicipal community will be launching its own geolocation mobile application that will cross consumers' preferences and profiles with their location to make suggestions for their trip. At the moment, it has its own tourism platform (see Figure 2.36) and communicates with visitors through social media such as Instagram and Facebook (Visit Serra da Estrela, 2020).

Figure 2.36 - Visit Serra da Estrela Logotype (Visit Serra da Estrela, 2020)

2.5.3. Complementary Destinations

Sintra is located in the metropolitan area of Lisbon with seventeen other municipalities. Among these, the municipality of Lisbon is the region's main focus of tourism, and Cascais and Sintra, respectively, the next centralities. City/Short Breaks is the main product offered in the region.

➢ Lisbon

Lisbon is the capital of Portugal and the main tourism hub of the region and the country. This municipality distinguishes from the remaining due to its international notoriety, diversity, authenticity, and maximum represent of the City/Short break tourism concept. Its main tourism products include a high-quality and diverse hotel sector and strong local accommodation options. Moreover, Lisbon has diverse cultural, gastronomic, shopping, and nightlife attractions, as well as robust infrastructures to receive cruises and smaller and medium sized events and conferences. Lisbon is World's Leading City Break Destination 2019, and Europe's Leading City Break Destination 2019.

Lisbon has high accessibility due to the proximity of the airport to the center of the city, several national and international trains connections, three cruise docks and strong national and international road connections. Within the municipality, there are several mobility options such as the Lisbon Metro subway, buses and trams. Lisbon has its own DMO, Turismo de Lisboa, and tourism platform, Visit Lisboa (see Figure 2.37), that is Europe's Leading City Tourist Board 2019. Visit Lisboa promotes not only the municipality of Lisbon but also the metropolitan area of Lisbon. It is through it that most information and communication is conveyed, and through the social networks Facebook, Instagram, Pinterest, YouTube, and Twitter (Turismo de Lisboa, 2020).

Figure 2.37 - Turismo de Lisboa and Visit Lisboa Logotype (Turismo de Lisboa, 2020)

➢ Cascais

Cascais is an internationally recognized tourist brand as a resort destination with a high position in the premium segment. It has a high-quality and competitive hotel sector with strong residential tourism offerings. The sun and sea, water sports, high-end restaurants, events and congresses, and golf constitute the main tourism products of Cascais. Cascais presents some constraints in accessing the municipality with the most effective way of getting there and moving around Cascais being by car. Cascais has its own tourism platform, Visit Cascais (see Figure 2.38), in which most of the tourism information and communication is published. In addition, it has Facebook, Instagram, YouTube, Flickr, and LinkedIn profiles (Visit Cascais, 2020).

The Charm *of the* Atlantic Coast

Figure 2.38 - Visit Cascais Logotype (Visit Cascais, 2020)

All these competitors take advantage of their unique selling propositions distinctively, with nature, cultural, and adventure tourism being the core products of the majority. A summary of the competition analysis is presented in Table 1 reflecting the most important tourism products and the digital presence of each tourism destination.

Table 1 - Competition Analysis Summary Table

	Nature Tourism and outdoor sports	Cultural Tourism	Sun and Sea	Golf	Gastronomy and Wines	Events and Business Tourism	Shopping	Lodging Options	Digital presence
Watchau Valley	5	5	5	4	4	3	3	4	3
Hallstatt	5	5	4	2	4	3	3	3	4
Dordogne Valley	5	5	5	2	5	4	3	4	5
Mullerthall Region	5	4	3	4	5	3	4	4	5
Alcobaça	5	4	4	3	4	4	3	3	5
Arcos de Valvedez	4	4	4	2	4	4	3	3	5
Serra da Estrela and Beiras Region	5	4	4	4	4	4	3	4	5
Lisbon	3	5	4	3	5	5	5	5	5
Cascais	4	3	5	5	5	5	5	5	5

Source: author's elaboration

2.6. Porter's Five Forces

Porter's 5 Forces is a model created by Michael Porter that serves as an instrument to measure the attractivity of a certain industry, in which several players compete. It evaluates the potential to create added value and sustainable competitive advantages in the industry.

➢ Threat of New Entrants

The threat of the entry of new tourism destinations is low due to the extremely high capital requirements, switching costs and sunk costs. In addition, differentiation is a key barrier to new entrants because destinations can successfully differentiate themselves by the location and tourism products.

➢ Threat of Substitute Products or Services

In the case of tourism destinations, there is a low threat of substitute products due to the intrinsic qualities and attributes of destinations. This makes them extremely difficult to replicate by any other industry product or service.

➢ The Rivalry Among Existing Competitors

The rivalry among existing competitors is extremely high due to the quality and quantity of promotion, the high number destinations and the degree of innovation and differentiation in the tourism industry.

➢ Bargaining Power of Suppliers

In the case of tourism destinations, the suppliers have a medium bargaining power. Traditional travel agencies and online travel agencies such as Expedia and TripAdvisor have a lot of control over the influx of visitors to destinations but are also dependent on destinations. In addition, human resources and labor unions represent are conditionings of the quality and diversity of tourism products in destinations.

➢ Bargaining Power of Buyers

Buyers are powerful due to the wide range of alternative destinations, a lot of available information over destinations, and price sensitivity over the tourism industry. As previously stated, there is a lot of competition in the tourism industry which increases customers' decision power.

Table 2 - Porter's 5 Forces Analysis Summary Table

	Low	Medium	High
Threat of New Entrants			✔
Threat of Substitute Products or Services			✔
The Rivalry Among Existing Competitors	✔		
Bargaining Power of Suppliers		✔	
Bargaining Power of Buyers	✔		
Industry Attractivity		✔	

Source: author's elaboration

2.7. Critical Success Factors

Identifying the critical success factors is fundamental to determine the key differentiator attributes in which destinations should concentrate to achieve sustainable competitive advantages in relation to the competition. Hence, the diversity and quality of lodging options, accessibility, cooperation among stakeholders, quality of restauration and gastronomy, quality of promotion and virtual presence, brand identity, quality of tourism products, hospitality and human resources, constitute the critical success factors of any tourism destination.

3. Internal Analysis

3.1. Municipality, Population and Climate

The municipality of Sintra is located in the region of Lisbon and is limited to the south by the municipalities of Cascais and Oeiras, to the east by the municipalities of Amadora, Loures and Odivelas, to the north by the municipality of Mafra, and to the west by the Atlantic Ocean with Cabo da Roca being the most western point of continental Europe.

The highest point of Sintra is in Cruz Alta (528 meters), in the Sintra hills that create two distinct areas. A warmer and drier south section, and a north section more humid, fresher and richer in vegetation.

Sintra predominately has a Mediterranean climate influenced by the Atlantic Ocean and the Sintra mountains that is characterized by moderate temperatures and wet winters. These mountains create a micro-climate in "Serra de Sintra" that allows for the development of dense foliage and a rich botanical diversity.

The municipality of Sintra includes 11 parishes[1] and is the second most populous of the country with 377835 habitants just behind Lisbon (547733 hab.). It represents 4% of the total population of the country, 13% of the metropolitan area of Lisbon and 20% of Great Lisbon. Despite the existence of a strong urban component and extensive rural and forestry areas in the municipality, Sintra still remains a very densely populated municipality (1184 hab./km2) when compared with the Lisbon metropolitan area (973 hab./km2). However, this is still lower than the big population concentrations of Amadora (7365 hab./km2), Lisbon (6161 hab./km2) and Odivelas (5486 hab./km2). The municipality of Sintra is the most balanced of the LMA with the age group of 0-19 years old representing 29.5% of the population and people above 65 years old representing 13.7% of the total population.

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[1] União das Freguesias de Agualva e Mira Sintra, Junta de Freguesia de Algueirão–Mem Martins, União das Freguesias de Almargem do Bispo, Pêro Pinheiro e Montelavar, União das Freguesias de Cacém e São Marcos, Junta de Freguesia de Casal de Cambra, Junta de Freguesia de Colares, União das Freguesias de Massamá e Monte Abraão, União das Freguesias de Queluz e Belas, Junta de Freguesia de Rio de Mouro, União das Freguesias de Sintra (Santa Maria e São Miguel, São Martinho e São Pedro de Penaferrim), and União das Freguesias de São João das Lampas e Terrugem.

3.2. Institutional Organization of Tourism in Sintra

The Regional Tourism Authority of the Lisbon Region is a public entity that acts in the Lisbon Metropolitan Area with the mission of enhancing and developing the tourist potential of the Lisbon region (ERT-RL, 2020).

The Lisbon Tourism Association is a nonprofit private association that acts as the regional tourism promotion agency for the region of Lisbon and which main activity is the international promotion of Lisbon as a tourism destination. Visit Lisboa is the main promotion platform and the official tourism website of the region of Lisbon with a particular emphasis on the city of Lisbon (Turismo de Lisboa, 2020).

The municipality of Sintra is the main driver of tourism in the region. Specifically for the tourism industry, the municipality has four platforms Visit Sintra, Sintra Capital do Romantismo, Active Sintra, and Sintra INN (CMS, 2020). In September 2020, the municipality of Sintra approved the creation of a consultative tourism council to debate and analyze the current and future panorama of tourism in Sintra, as well as the perspectives and joint strategic measures to be followed.

Parques de Sintra-Monte da Lua, S.A. is a public non-profit organization responsible for protecting and valuing Sintra's most important cultural and natural values of the Cultural Landscape of Sintra and Queluz (Parques de Sintra, 2020).

The Sintra Tourism Association, ATSintra, is a private association of tourism companies and entities in the areas of hotel and local accommodation, tourist animation, catering and commerce with their activity based in Sintra that aims to promote the Sintra brand through the establishment of public and private partnerships in order to improve the customer experience (AT Sintra, 2020).

3.3. History

Sintra is the symbol of romanticism, World Heritage Site and Cultural Landscape classified by UNESCO (Table 3). Its palaces, castles, estates, and nature give Sintra an exclusive feel. It was called "Suntria", the oldest and medieval way of pronouncing "sun" or "luminous star", also called "Holly Mountain" and "Mountains of the Moon".

It was in the reign of D. Fernando II that Sintra started to be associated to romanticism with the acquisition of the Pena Convent and posterior transformation into the palace of today. In addition, the king surrounded the palace with a park filled with exotic trees, fountains, watercourses, chalets, chapels, and immense paths, and restored the forests of the Sintra mountains ("Serra de Sintra") to become a unique cultural and natural

landscape posteriorly (1995) classified by UNESCO as World Heritage Site and Cultural Landscape.

Many figures of arts were inspired by the natural and cultural beauty of Sintra such as Viana da Motta and Richard Strauss (musicians), Vergílio Ferreira (writer) and Cristino da Silva who produced "Cinco Artistas em Sintra" (Five Artists in Sintra) one of Portuguese Romanticisms most famous paintings. Also, Eça de Queiróz and Ramalho Ortigão were inspired and lived in Sintra.

Table 3 - UNESCO World Heritage Site and Cultural Landscape, Sintra (Paisagem Cultural de Sintra, 2020)

UNESCO World Heritage Site and Cultural Landscape	
Parks and Forestry	Pena Park, Monserrate Park, Serra Forest spots
Historic Center	Sintra Old Village
Aulic Architecture	Sintra National Palace, Pena Palace, Chalet of the Countess d´Edla, Monserrate Palace, Quinta da Penha Verde, Ribafrias Palace, Seteais Palace, Quinta da Regaleira, Biester Chalet, Quinta do Relógio, Quinta dos Pisão, Quinta do Saldanha, Friendship Farm
Militar Architecture	Castle of the Moors
Religious Architecture	Jerónimo Convent of Nossa Senhora da Pena, Trindade Convent (Arrabalde), Carmo Convent (Eugaria), Santa Cruz dos Capuchos Convent, Former Parish Church of S. Pedro de Canaferrim, Parish Church of Santa Maria, Former Parish Church of São Miguel, Parish Church of São Martinho, Church of Our Lady of Mercy, Chapel of the Holy Spirit (National Palace of Sintra), Chapel of Santa Catarina (Penha Verde), Chapel of São João Baptista (Penha Verde), Chapel of São Brás (Penha Verde), Quinta do Saldanha Chapel, Chapel of the Holy Trinity (Regaleira), Chapel of Nossa Senhora da Piedade
Archeologic Monuments and Traces	Neolithic site of São Pedro de Canaferrim, Neolithic/Chalcolithic village of Rua das Padarias (Vila Velha de Sintra), Chalcolithic settlement of Penha Verde, Tholos da Bela Vista, Bronze Age settlement of Castelo dos Mouros, Bronze Age deposit of Monte do Sereno, Bronze Age/Iron Village of Parque das Picendas, Sintra's Roman Station and possible Roman Road and Necropolis of Rua da Ferraria, Medieval Necropolis of the Old Parish Church of São Pedro de Canaferrim, Medieval Necropolis of the Old Parish Church of Santa Maria, Medieval Necropolis of Our Lady of Milides

3.4. The Sintra Brand

Sintra has a well-established international brand, highly connected to Lisbon and Cascais with features that complement them. Sintra is the capital of romanticism due to its unique environment and communion between nature and romanticist monuments.

3.5. Virtual Presence

3.5.1. Web Presence

As stated previously, Sintra has four platforms for tourism in the municipality Visit Sintra, Sintra Capital do Romantismo, Active Sintra, and Sintra INN.

Visit Sintra (see Figure 3.1), similarly to Visit Lisboa, acts as the main promotion platform and the official tourism website of Sintra (Visit Sintra, 2020).

Figure 3.1 - Visit Sintra Logotype and Webpage (Visit Sintra, 2020)

Sintra Capital do Romantismo (see Figure 3.2) is a secondary tourism platform that provides additional tourism information (Sintra Romantica, 2020).
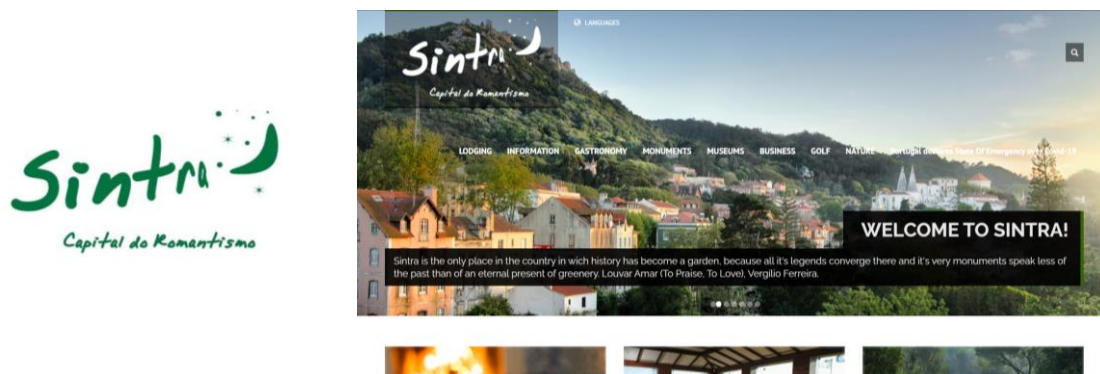

Figure 3.2 - Sintra Capital do Romantismo Logotype and Webpage
(Sintra Romantica, 2020)

Active Sintra (see Figure 3.3) is a brand that promotes sustainable active tourism with the goal of attracting and retaining tourists throughout the year and for longer stays, improving the customer experience, the local community quality of life and the environment (Active Sintra, 2020).
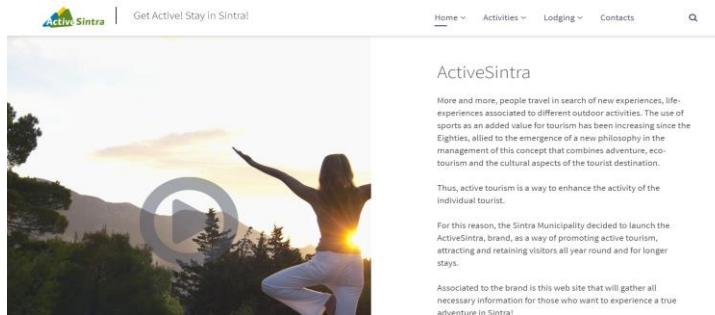
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Figure 3.3 - Active Sintra Logotype and Website (Active Sintra, 2020)

On the other hand, Sintra INN (see Figure 3.4) is an innovative project of the municipality of Sintra with the aim of creating a platform that concentrates the offering of local accommodations in Sintra (Sintra INN, 2020).

Figure 3.4 - Sintra INN Logotype and Webpage (Sintra INN, 2020)

In addition to these platforms, the municipality of Sintra created the Sintra Move program (see Figure 3.5) that aims to increase and diversify the sports offering of the region in partnership with local associations and entities that operate in nature and adventure tourism (SintraMove, 2020).

Figure 3.5 - Sintra Move Logotype and Website (SintraMove, 2020)

Parques de Sintra Monte da Lua also has its own website (see Figure 3.6) with regular promotions and discounts to visit the monuments that is responsible for. Moreover, it has

educational services and programs for schools, families and birthday parties, as well as horse and donkey rides, and a diverse cultural agenda that includes equestrian shows and erudite music (Parques de Sintra, 2020).
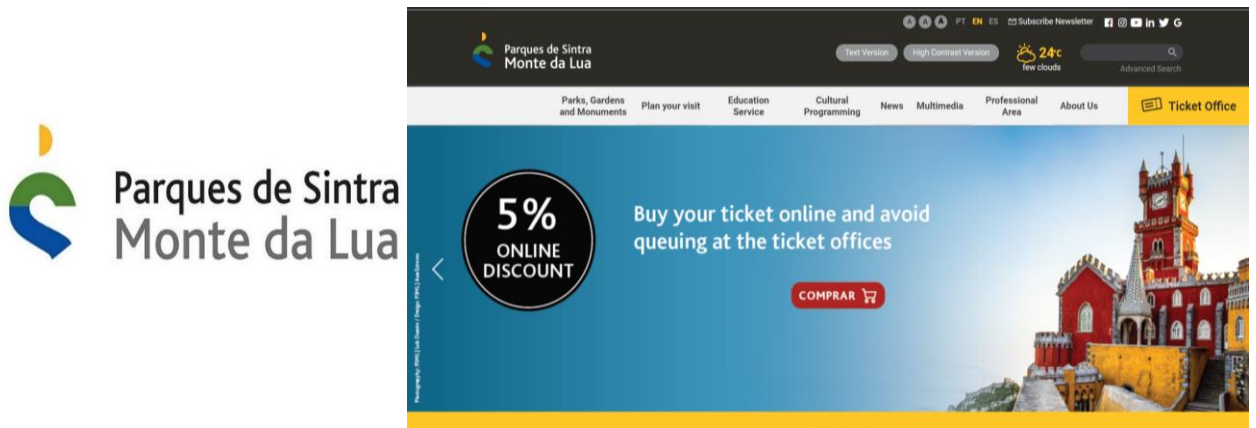

Figure 3.6 - Parques de Sintra Monte da Lua Logotype and Website
(Parques de Sintra, 2020)

Finally, there is a partnership with TripAdvisor (see Figure 3.7), the biggest online community for tourism, that is referenced in Sintra Capital do Romantismo and Sintra Active websites. This partnership allows tourism entities and business to manage visitors' expectations and concerns through their comments and ratings (TripAdvisor, 2020).
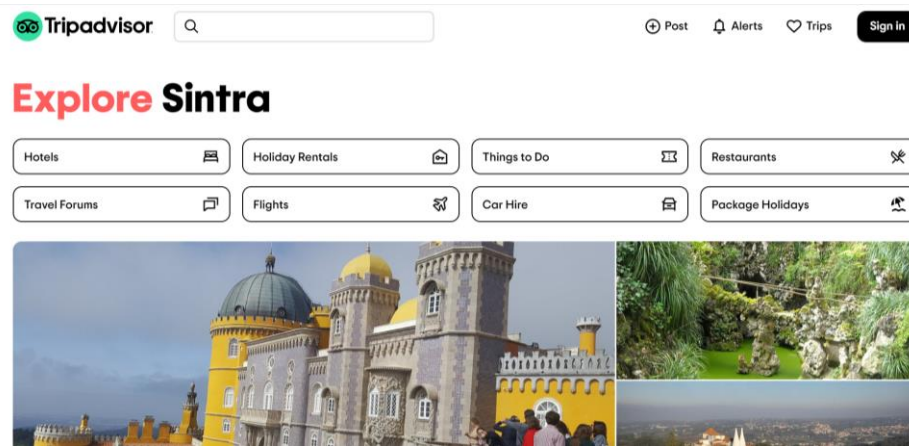
Figure 3.7 - TripAdvisor page of Sintra (TripAdvisor, 2020).

3.5.2. Social Networks Presence

The social network presence of Visit Sintra, Sintra Capital do Romantismo, Sintra INN, and Sintra Move (Sintra Active does not have social networks) is highly interdependent between themselves and between the social networks of the municipality of Sintra. On this note, Visit Sintra, Sintra Capital do Romantismo, Sintra Inn and the Municipality of Sintra have the same Facebook page (see Figure 3.8) with the name Câmara Municipal

de Sintra and the logotype of the municipality of Sintra being the profile picture. This communion represents a lack of tourism promotion on Facebook with institutional projects and measures of the municipality being the main communication priority.

Figure 3.8 - Facebook page, Visit Sintra, Sintra Capital do Romantismo, Sintra Inn and the Municipality of Sintra

Continuing with Facebook, Sintra Move has its own profile (see Figure 3.9) with the name and profile picture of the project and regular publications on sports news of the municipality.
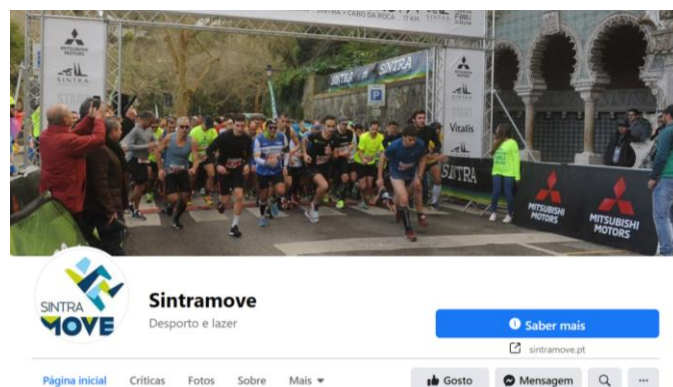

Figure 3.9 - Facebook page, Sintra Move

Visit Sintra and the Municipality of Sintra share an Instagram profile (see Figure 3.10) with the name Câmara Municipal de Sintra and the logotype of the municipality of Sintra in the profile picture. Similarly to what happens with the Facebook page, tourism promotion in this social network is sporadic and not the main priority.
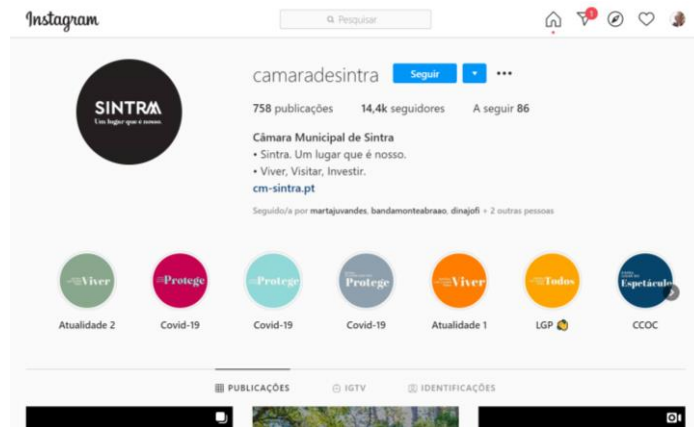
Figure 3.10 - Instagram page, Visit Sintra and Municipality of Sintra

Visit Sintra, Sintra Move and the municipality of Sintra share a Twitter profile (see Figure 3.11) with the name Câmara Municipal de Sintra and the logotype of the municipality of Sintra in the profile picture. Once again, tourism promotion is sporadic and not the main priority.

Figure 3.11 - Twitter profile, Visit Sintra, Sintra Move and Municipality of Sintra

As far as YouTube, Visit Sintra and Sintra Capital do Romantismo share the same YouTube account (see Figure 3.12) with the name Sintra Romântica and the same logotype of Sintra Capital do Romantismo. This is an account directly focused on the promotion of tourism in Sintra, however the last video upload was three years ago denoting a lack of promotion through this channel.
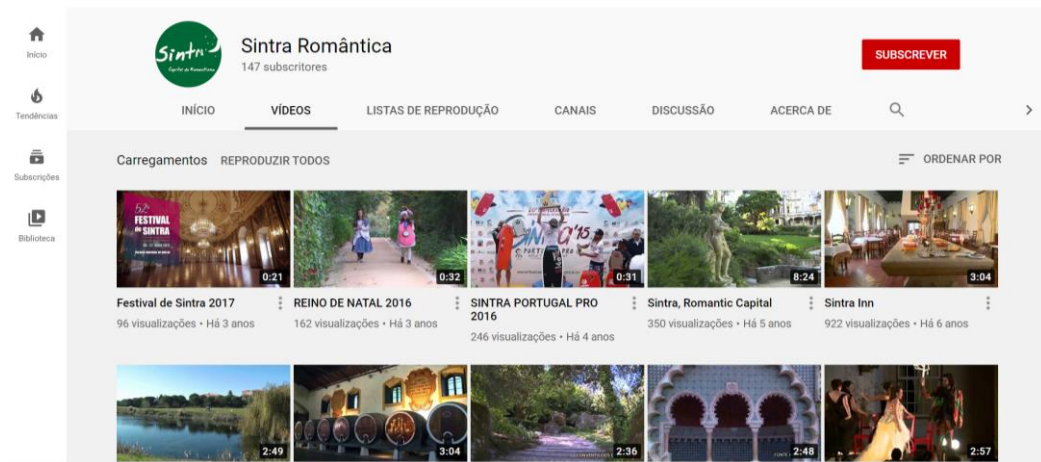
Figure 3.12 - YouTube profile, Visit Sintra and Sintra Capital do Romantismo

Finally, Sintra Move and the municipality of Sintra share a YouTube account (see Figure 3.13) with the logotype and name of the municipality of Sintra. This profile last upload was in October 2019 and has regular videos promoting the culture and tourism of Sintra.
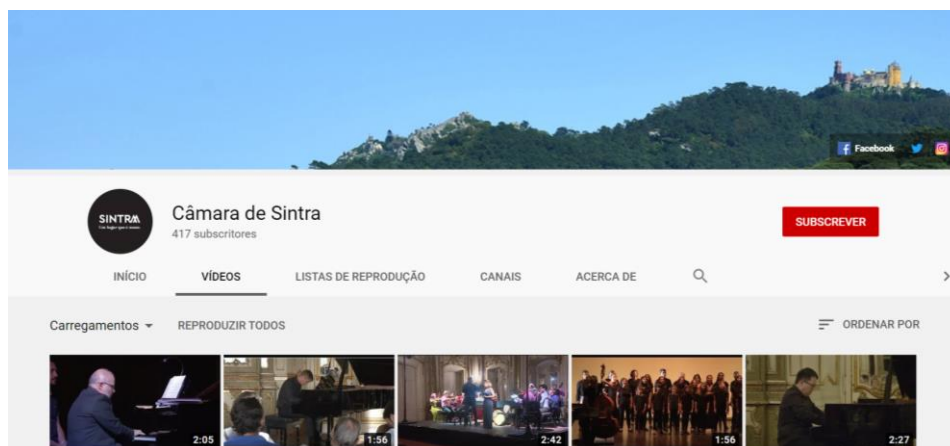
Figure 3.13 - YouTube profile, Sintra Move and the municipality of Sintra

Parques de Sintra Monte da Lua has its own Facebook, Instagram, YouTube, and Twitter profiles (see Figure 3.14) all with the same name, "Parques de Sintra", and profile picture. In all these social networks the non-profit organization publishes regular content to promote its products, mainly the monuments. In addition, it has a LinkedIn profile more devoted to recruiting but also with publications promoting its activity.
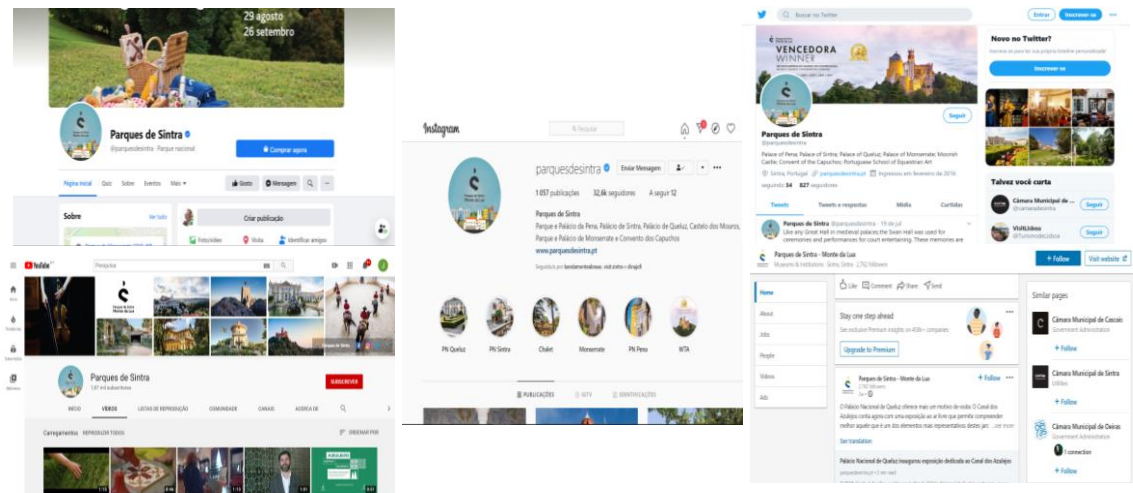
Figure 3.14 - Social Networks, Parques de Sintra Monte da Lua

3.6. Product Offering

According to the main tourism platform of Sintra, Visit Sintra, the core products of the municipality are Monuments and Museums, Parks and Gardens, Viewpoints and Waterfalls, Beaches. In addition, there are complementary products that include Sports (air, land and sea), Golf, the Sintra Tram, Gastronomy and Wines (see Annex M). Visit Sintra suggests its visitors some routes to make the most out of their trip (Visit Sintra, 2020).

The municipality of Sintra has some of the best beaches in Portugal despite none being considered accessible beaches (the municipality of Sintra is undergoing improvements on accessibility in two beaches). According to TripAdvisor, the Ursa Beach is the second best in the country, and Adraga Beach is in the top 30 best beaches of Portugal (TripAdvisor, 2020).

Regarding Golf, Sintra is the municipality with the most golf clubs in the region of Lisbon. Moreover, these golf clubs are supporting infrastructures of some of the most important competitions of the country (e.g. Lisbon Cup, Estoril International Golf Week, Open Portugal 2010). This confers a great opportunity to turn the practice of golf in a core product of Sintra.

The business tourism and events sector in Sintra is not as developed as other centralities (Lisbon and Cascais). There is a lack of high capacity infrastructures for big events and conventions in Sintra (see Figure 3.15), such as hotels, pavilions, auditoriums and restaurants, when compared with Lisbon and Cascais (ERT-RL, 2020). However, some events do have place in Sintra like the World Bodyboard championship and the Sintra Festival. Overall, Sintra is a desirable location for small and medium sized events

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and business meetings due to its unique venues (see Annex N) such as palaces and the landscapes of a World Heritage site (Sintra Romantica, 2020).
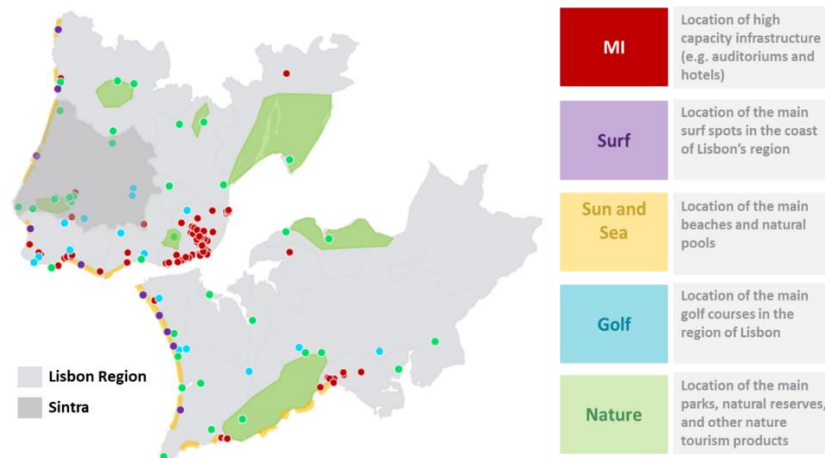

Figure 3.15 - Location of Strategic Tourism Products (ERT-RL, 2020)

The Vila Galé Sintra Resort Hotel introduced a new segment of tourism to the municipality of Sintra, health and wellness tourism. This hotel was designed for families with a strong focus on wellness with low-calorie buffet options, an outdoor pool, spa and fitness center, as well as several mental and physical well-being programs for its customers. Vila Galé Sintra Resort Hotel includes a five-star hotel tourist apartment and unites for direct sale (Vila Galé Sintra, 2020).

3.7. Accessibility and Mobility

Visitors have several options to reach the municipality of Sintra and move inside the municipality. By car there are several connections such as IC 19 (from Lisbon), IC 30 (from Mafra), and the EN 9, A5 or A16 (from Cascais). There are six car parks in the village of Sintra and free transfers every 7 minutes are available between Sintra train station and Portela de Sintra and Cavaleira car parks, from 9 a.m. to 8 p.m.

On the other hand, visitors can arrive by train (and transport their bicycles for free) in a trip that lasts 45 min from Lisbon and that passes through the most populated parishes of the municipality. Moreover, there are several bus lines that depart from Ericeira, Mafra, Cascais and Oeiras, and 22 concessions exclusively for mobility within the municipality. Finally, the tram ride makes the connection between the village of Sintra and Maçãs Beach in a ride of 11 kilometers that lasts around 45 minutes through the landscape of Sintra.

The Sintra municipality is developing together with the municipalities of Amadora and Oeiras the Green and Blue Axis project to revitalize the Jamor river and better integrate it with the urban ecosystem. This project creates new spaces for leisure and recreation where previously were disused spaces, improves the local community's quality of life and enhances the mobility of residents and tourists. Cycling and walking trails were created and the green areas nearby the National Palace of Queluz have been improved, but not completed.

3.8. International Recognition and Awards

➢ Sintra:
- UNESCO World Heritage Site;
- UNESCO Cultural Landscape;
- 1st prize of the "Best of Cities, Communities & Culture" award category in the "Best of Top 100 Awards" at ITB Berlin 2018;
- 1st prize of the "Best of Europe" awards category in the "2019 Sustainable Top 100 Destination Awards" at ITB Berlin;
- Quality Coast Gold Award.

➢ Parques de Sintra Monte da Lua:
- Since 2013, World Travel Award for the World's Leading Conservation Company;
- 2017, Heritage Internationalization award within the AR&PA Biennial – Iberian Biennial of Cultural Heritage;
- 2017, "Diversity Champion" award by Diversition;
- 2017, "Recognition of Best Practices in Social Responsability" award by the Portuguese Ethics Association;
- 2017, "Best Cultural Merchandising" award by the Portuguese Association of Museology.

4. SWOT Analysis

Strengths

1. Sintra is located in one of the most peaceful and friendliest countries in the world. In addition, Turismo de Portugal was one of the first tourism authorities in the world to develop measures for the tourism industry to face the health crisis by creating the "Clean & Safe Stamp". Also due to this, Portugal was the first country in Europe to be recognized with the "Safe Travels" badge;

2. Sintra's close proximity to Lisbon and Cascais, both complementary destinations of Sintra, permits the development of a diverse and strong tourism destination;

3. Sintra is an internationally recognized brand, Capital of Romantism, World Heritage Site and Cultural Landscape classified by UNESCO. It has a rich cultural and natural heritage, with several landmarks (e.g. Pena Palace), some of the best beaches in Portugal, and the most golf courses in the region of Lisbon;

4. In Sintra is located the most western point of continental Europe;

5. Sintra has great infrastructures and products for the practice of nature and adventure tourism;

6. Sintra has a rich gastronomy and a highly regarded wine;

7. Sintra is the second most populous municipality of Portugal with good tourist accessibility and mobility;

8. The tourism websites of Visit Sintra and Sintra Capital do Romantismo are complete and up-to-date. In addition, the destination Sintra has a presence in social media platforms like Facebook, YouTube, and Instagram;

9. Sintra INN is a great platform for the promotion of local accommodation options, the most prominent type of accommodation in the municipality of Sintra.

Weaknesses

1. Due to the pandemic, there was a drastic decrease in the tourism indicators of overnight stays and tourism revenue in Portugal, the Lisbon Metropolitan Area, and Sintra;

2. Several parishes of Sintra are in a Situation of Calamity which restricts the mobility and accessibility of both tourists and the local community;

3. Sintra is not included in the SMIITY free mobile application for citizens and tourists that provides information on news, events, trails, points of interest, among other products on several Portuguese destinations;

4. Sintra has a relatively low bike friendly index for a destination that "sells" nature tourism;

5. Sintra has a very limited hotel capacity (local accommodations represent 68% of rooms) when comparing with Lisbon and Cascais. This contributes to the lowest medium length of stay in lodging accommodations of the three most important tourism centralities of the metropolitan area of Lisbon;

6. There is a lack of high-end options in Sintra for both accommodation and restauration;

7. The social media presence of the tourism entities and programs of Sintra is extremely unclear and complicated;

8. Sintra has underdeveloped business tourism, and events and congresses infrastructures, as well as little options for nightlife and shopping activities;

9. Sparse promotion of the tourism products of Colares and Queluz.

Opportunities

1. The economic aid from the central Portuguese government for companies and workers to face the COVID-19 pandemic will ease the difficulties felt by the pandemic;

2. Portugal continues to ease its confinement and lockdown restrictions in the country, in most of the metropolitan area of Lisbon and in part of the municipality of Sintra;

3. More than half of the Portuguese population will live in cities by 2050 which will increase the need for nature and adventure tourism destinations;

4. Consumers are attributing more importance to smart cities and smart tourism, social media, mobile technology, big data, recognition technology, virtual reality, augmented reality, robotics, and artificial intelligence;

5. A large portion of visitors have in account the "instagramability" factor when choosing a destination to visit;

6. Turismo de Portugal intends to promote Portugal as one of the most competitive and sustainable destinations in the world. Sintra can benefit from this due to its vast natural attributes;

7. Consumers want more authentic and sustainable destinations, as well as more personalized experiences;

8. Wine tourism and creative tourism will become more important. Turismo de Portugal developed a Wine Tourism Action Program to promote the country as a wine tourism destination;

9. Develop and promote the traditional gastronomic attractions of Sintra, by encouraging the opening of restaurants specialized in regional dishes (e.g. Negrais sucking pig);

10. Health and wellness tourism and residential tourism promotion by leveraging Sintra's international profile, variety of palaces, and core products such as culture and nature, as well as the close proximity to Lisbon;

11. Develop and promote the Green and Blue Axis project as a symbol of nature and adventure tourism in the municipality of Sintra;

12. Take advantage of the high international recognition of Parques de Sintra Monte da Lua and expand the organization's sphere of influence in the municipality of Sintra;

13. Promote Sintra as an adventure tourism destination, by leveraging its international recognition, and natural attributes for the practice of a wide range of sports.

Threats

1. The tourism industry is facing one of the biggest global crises ever registered;

2. There are accessibility restrictions for tourists outside the European Union and Schengen Area;

3. There is a strong decline of Portugal's GDP in 2020 and of the Portuguese consumers' confidence index;

4. Unemployment growth, and decrease of disposable income and, consequently, a reduction of consumer spending in Portugal will affect the performance of the tourism industry;

5. Portuguese consumers are showing reluctancy in practicing activities such as travelling and gathering in crowded spaces;

6. Consumers will seek for higher hygiene and security standards, more concise and reliable information regarding security challenges, and preventive measures, as well as more flexibility in choosing a destination;

7. Climate change can disrupt the natural landscape of Sintra and dramatically affect the tourism product offering of the municipality;

8. The occupation rate and revenue generated by local accommodations (the most representative type of accommodation in the municipality of Sintra) drastically decreased.

4.1. Dynamic SWOT

Offensive Strategies

- S3O5. Develop communication campaigns emphasizing the internationally recognized brand of Sintra as the Capital of Romanticism and its picturesque landscapes particularly in the social media platform Instagram;

- S4O5. Take advantage of the location of Sintra, the most western point of continental Europe, to promote the destination by emphasizing Cabo da Roca as a "must see" attraction using communication campaigns on social media;

- S5O3. Create an action plan for the development and promotion of nature and adventure tourism in the municipality of Sintra, so it becomes a "flag" of this tourism destination;

- S6O7. Develop and promote the rich gastronomy and highly recognized wines of Sintra to create more complete, personalized and authentic tourism experiences.

Confrontation Strategies

- S1T6. Take advantage of a highly recognized tourism board, Turismo de Portugal, to ensure the high security standards of the destination;

- S2T2. Develop a plan to promote Sintra as a "must see" tourism destination nation-wide, emphasizing the natural and cultural attractions as well as the close proximity to Lisbon and Cascais that serve as complementary tourism destinations;

- S5T5. Promote the vast natural resources and spaces of Sintra to incentivize nature and adventure tourism with social distancing;

- S9T8. Develop the Sintra INN platform to be a catalyzer of local accommodation to ensure that all lodging options present in it comply with the security and hygiene standards of health agencies;

Strengthening Strategies

- W4O11. Improve the infrastructures for the practice of cycling to increase consumers' perceptions of Sintra as a highly diverse and complete nature and adventure tourism destination;
- W5O7. Promote the platform Sintra INN and its local accommodation options to increase consumers' perceptions of an authentic destination that offers an authentic tourism experience;
- W6O9. Develop and promote the traditional gastronomic culture of Sintra to encourage the opening of high-end specialized regional restaurants;
- W8O12. Take advantage of Parques de Sintra Monte da Lua recognition to develop communication campaigns to increase the number of events and business tourism occurring in the monuments of this entity;
- W9O8. Develop communication campaigns to promote the quality and rich history of the Colares wine.

Defensive Strategies

- W7T6. Develop a new social media plan for Sintra as a tourism destination that includes concise and organized information regarding hygiene and security measures for the practice of tourism;
- W8T8. Improve the conditions (e.g. promotion, infrastructures) for the development of business tourism and events to increase the occupation rate of the lodging sector;
- W9T5. Develop a promotion plan for the tourism products of Colares and Queluz that showcase the diversity of Sintra as a tourism destination.

5. Vision, Mission, Goals, and Strategy Selection

The vision represents the long-term objective of the tourism destination. Hence, Sintra's vision should stand to be the most desirable and memorable destination in Portugal. As far as the mission, Sintra should aim to provide a complete and immersive tourist experience to its visitors by promoting its most appreciated attributes (i.e. nature, romanticism, culture, gastronomy, among others) and differentiate itself from the competition.

In terms of the goals for the tourism of Sintra, the following are suggested:

- Increase Sintra's reputation as a romantic and mysterious destination having a diversity of attractions both cultural and natural, strong and established gastronomic products and a rich wine tradition;

- Build high-impact awareness and strong recall for Sintra's new brand architecture;

- Decrease the tourism seasonality and increase visitors' overnight stays;

- Increase consumers' confidence on Sintra as a safe tourism destination;

- Create an appealing and exciting visual brand for Sintra;

- Increase the economic contribution of tourism to Sintra's economy;

- Increase social media engagement and followers.

According to the research conducted in the literature review chapter, destinations need to formulate strategies that maximize their competitiveness. For this reason, following a differentiation strategy appears to be the most advantageous competitive strategy as it increases customers' satisfaction and willingness to pay higher prices, thus maximizing the benefits for the destination through added value.

6. Segmentation and Targeting

The main segmentation criteria for the development of Sintra's tourism visitor target include geographic, demographic, behavioral, and psychographic segmentation.

Following the research conducted in the literature review regarding consumer behavior during and post crises that sates that consumers often try to avoid mass tourism and overcrowded destinations and prefer to travel to domestic destinations during health crises, as well as, the latest reports on the airline industry, the demographic segmentation criterion for this marketing plan is Portugal.

Visitor profiles

➢ Modern Family

In a modern family, all members are included on a vacation creating groups in all shapes and sizes. Multi-generational trips are increasing in popularity where everyone has different preferences, needs and expectations that need to be catered.

The modern family has members that are part of almost all age groups, different education backgrounds and occupations. They have budget sensitivity and are highly interested in entertainment and dining options.

➢ Young Couples

Young Couples are highly attracted to the romanticism factor of Sintra. They look for privacy and relaxation sites. Having between 20 and 35 years old and being highly educated, they are in the stage of their life where they want to enjoy the very best perks of life, from gastronomy to entertainment.

➢ Cultural Enthusiasts

Cultural Enthusiasts are highly interested in the historic elements of the destination. They are eager to know the little details of each attraction. Having a wide age span, between 30 and 65 years old, this is a group with a diverse educational background and occupations.

➢ Adventure Seekers

Adventure Seekers are highly interested in outdoor sports and nature. They have a special interest in action and adrenaline. Having fun is their main goal. They have between 20 and 35 years old, work, and go out often. They travel to get a break from the rush environment of the workdays.

➢ Hometown Host

Hometown Hosts represent the local community that lives in the tourism destination. They have the power to invite friends and family from out of town to visit increasing the exposure of the destination to new audiences as well as encouraging hosts to spend more time and money in local activities. Hometown hosts are also highly important to create authentic local experiences.

➢ The Experienced Generation

The Experienced Generation represents the older generation, retired visitors older than 65 years old. They want to spend their time actively with their friends and family, they enjoy practicing outdoor, cultural, and gastronomic activities. They have the highest income of all.

7. Positioning

Perceptual Map

The construction of a perceptual map (see Figure 7.1) allows the understanding of consumers' perceptions of the tourism destinations. In this regard, two attributes were chosen to conduct the analysis. Brand recognition and the value of attractions in the tourism destinations were evaluated through a search of TripAdvisor ratings and comments on the specific destinations and their attractions. The value of attractions measures both the quality (by ratings), and the diversity of attractions in a tourism destination.
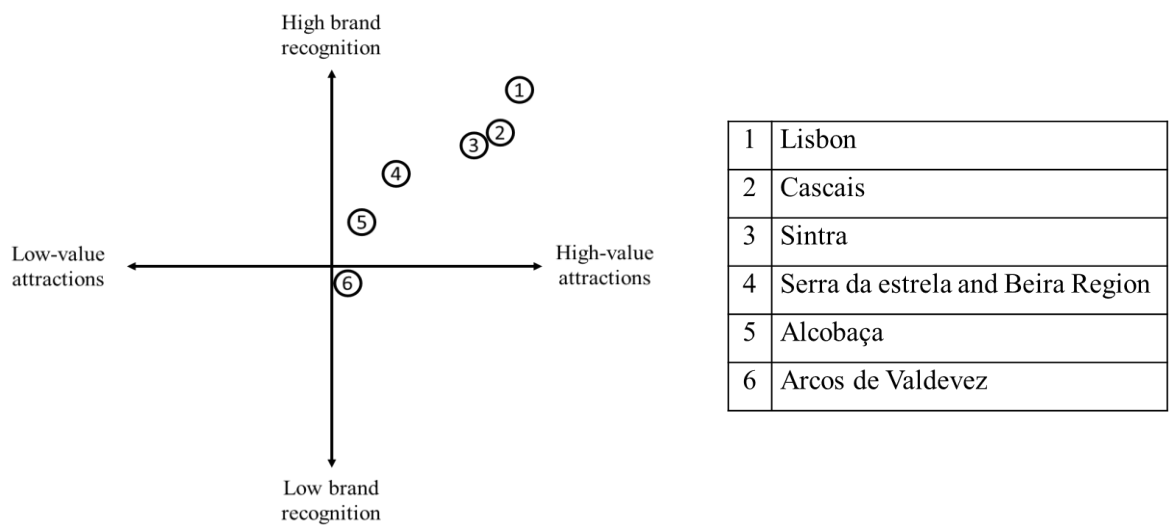

1	Lisbon
2	Cascais
3	Sintra
4	Serra da estrela and Beira Region
5	Alcobaça
6	Arcos de Valdevez

Figure 7.1 - Perceptual Map

Source: author's elaboration based on TripAdvisor ratings and comments

Golden Triangle of Positioning

- Customer's expectations:
    - More sustainable and authentic destinations;
    - Higher involvement of the local community in the touristic experience;
    - Security and hygiene, as well as price, nature and culture are the most important factors when choosing a tourism destination.
- Positioning of competitors:
    - Strong nature tourism segment;
    - Gastronomy and wines constitute an important tourism attribute;
    - Effective communication and strong digital presence.

- Destination's potential trumps
    - Internationally recognized brand, "Capital of Romanticism";
    - World Heritage Site and Cultural Landscape classified by UNESCO;
    - Rich cultural and natural heritage;
    - Diverse set of attractions that allow for the development of several tourism concepts.

Identification

A tourism destination located in the region of Lisbon recognized by UNESCO as World Heritage Site and Cultural Landscape that possesses a rich cultural and natural heritage aimed to satisfy the needs, wants and expectations of its visitors.

Differentiation

Sintra's differentiation relies on its internationally recognized brand as the "capital of romanticism" anchored by its classification of World Heritage Site and Cultural Landscape by UNESCO. This tourism destination is able to provide a complete and immersive tourism experience to a wide range of visitor profiles due to its variety of natural, cultural and gastronomic assets.

7.1. Brand

The Sintra brand has a high notoriety to consumers appearing to be between the top two levels of the notoriety pyramid "top of mind" and "brand recall" (see Annex L). The name of this tourism destination is thus well-known for the general public.

Slogan

"Sintra, the Capital of Romanticism"

Logotype

Brand Triangle

- Identity – Sintra is a tourism destination commonly referred as the "capital of romanticism". It appeals to its visitors due to its capacity to transmit emotion in a close relation with nature and its beautiful landmarks. The slogan "Sintra, the

Capital of Romanticism" and the logotype of this tourism destination are part of the identity sought for Sintra.

- Object – As a tourism destination, Sintra possesses a diverse set of natural and cultural attractions. This diversity of tourism products, strongly related with the local community and tourism agents, offers a customizable experience for every single visitor.

- Market – With the proposed communication strategies, it is a goal to establish Sintra as a consolidated "top of mind" brand with a strong connection to emotion, nature, romance and mystery.

Brand Positioning

It is an objective of this project to develop a stronger brand for the tourism of Sintra evolving it from a brand focused on the natural elements of the municipality and the most famous monuments (e.g. Pena Palace) to a more diverse and modern brand that acknowledges the importance of a strong gastronomic offering and includes in-trend tourism segments (e.g. health and wellness tourism, residential tourism) all in consonance with the core products of Sintra (i.e. nature tourism, cultural tourism, adventure tourism) and the emotions associated with the destination (romance, mystery).

Due to the inherent complexities of managing a destination, this project focuses on the product-mix and communication-mix of Sintra. The price-mix and distribution-mix of destinations are extremely dependent on the individual characteristics of each business making them not suitable to develop for a destination-wide project.

8. Product

8.1. Core Products

In this marketing plan, Sintra's core tourism products will consist on Nature Tourism, Adventure Tourism, and Cultural Tourism, due to the fact that these tourism products are the ones that have the most notoriety, and the ones that satisfy the expectations, needs, and wants of the majority of the visitors of the destination.

➢ Nature Tourism

Nature tourism is a tourism product closely related with the inherent characteristics of Sintra. It is a product that takes advantage of the immense natural attractions of this destination and that appeals to a vast set of visitors. Practicing nature tourism is the perfect way to experience the diversity of parks, gardens, beaches, viewpoints and waterfalls that Sintra has to offer.

Target: Modern Family, Young Couples, Cultural Enthusiasts, Adventure Seekers, Hometown Host, The Experienced Generation.

➢ Adventure Tourism

Sintra has unique characteristics that allow for the development of a well-rounded adventure tourism segment. The immense possibilities to practice a wide variety of outdoor sports provide this destination with a differentiator factor. Visitors have the option to practice sports by land, air and sea that allow them to experience the destination in a non-conventional way.

The development and completion of the Green and Blue Axis will permit it to be a symbol of nature and adventure tourism in the municipality of Sintra due to its large span across Sintra and close municipalities.

Target: Young Couples, Adventure Seekers, Hometown Host.

➢ Cultural Tourism

Strongly connected with the previous primary product (i.e. Nature Tourism), Cultural Tourism is a nuclear element of the product offering of Sintra. All monuments and museums of this tourism destination have a close relation with nature and the surrounding environment. Cultural tourism can be highly improved with the adoption of new technologies particularly virtual reality and augmented reality both technologies that give visitors new perspectives of the attractions.

Target: Modern Family, Young Couples, Cultural Enthusiasts, Hometown Host, The Experienced Generation.

The close relation between the core products (i.e. nature tourism, adventure tourism and cultural tourism) allows to offer visitors a more holistic and diversified experience that is capable of enhancing customers' perceptions as well as the destination's image and competitiveness. Moreover, the primary products are the ones with the most preponderance in transmitting emotion to visitors, more specifically the romance and the mystery that are part of the brand of the destination.

8.2. Qualifying Products

Following the nomenclature of Turismo de Portugal, qualifying products translate the diversity of the region and have the distinct capacity to fulfill the different motivations of visitors. In this regard, they are a crucial component to differentiate and strengthen the tourism destination. For Sintra, the qualifying products are Golf and Gastronomy Tourism and Enotourism.

➢ Golf

The practice of golf in Sintra is supported by four golf courses that are nationally and internationally recognized and supporting infrastructures of some of the most important competitions of the country (e.g. Lisbon Cup, Estoril International Golf Week, Open Portugal 2010). In addition, Sintra is the municipality in the region of Lisbon with the most golf clubs, conferring a higher capacity to explore this sport as a differentiator tourism product of Sintra.

Target: Adventure Seekers, Hometown Host, The Experienced Generation.

➢ Gastronomy Tourism and Enotourism

There is a clear opportunity to develop Gastronomy Tourism and Enotourism of Sintra to primary products of the destination due to its diversity and high potential. However, the lack of a strong restaurant segment in Sintra, inhibits its growth. Despite this, it still can be a differentiator factor in visitors' tourism experience. Enhancing the history and the characteristics of Colares wine and advocating it as a main figure of the gastronomy of Sintra, complemented with the promotion of a variety of regional dishes, is necessary to bring diversity and provide more immersive and complete experiences to consumers.

Target: Young Couples, Cultural Enthusiasts, Adventure Seekers, Hometown Host, The Experienced Generation.

8.3. In-development Products

➢ Events and Business Tourism

As stated previously, Sintra has an underdeveloped events and business tourism segment when compared with the other two main centralities of the region of Lisbon (i.e. Lisbon and Cascais). However, there is opportunity to improve them by taking advantage of the several parks and gardens for outdoor events and business meetings, especially during the times of a pandemic, as well as the several museums, palaces and monuments in Sintra that can act as venues for events and business tourism.

Target: Modern Family, Young Couples, Hometown Host, The Experienced Generation.

➢ Health and wellness tourism

The health and wellness tourism, first introduced by Vila Galé Sintra Resort, can rapidly become an important tourism product for Sintra. More than often visitors want a place to relax, reduce stress and enhance their wellbeing and Sintra provides extraordinary assets to it, particularly the proximity with nature, major cities (Lisbon and Cascais), diverse gastronomy and a wide range of activities for entertainment.

Target: Modern Family, Young Couples, Hometown Host, The Experienced Generation.

➢ Residential tourism

Residential Tourism is a way to take advantage of the magnificent historical buildings of Sintra. The abundance of palaces and mansions available for this form of tourism allows visitors to establish stronger bonds with Sintra by taking advantage of unique attractions of the destination. More than often, the aim of visitors in residential tourism is consumption, leisure, and tranquility. All of these are activities that Sintra can offer with singularity providing an immersive experience to visitors. Sintra INN should be the main driver of this in-development tourism product in order to take advantage of a platform that already has several lodging options for visitors who wish to stay in local accommodation.

Target: Modern Family, Young Couples, Cultural Enthusiasts, Adventure Seekers, The Experienced Generation.

➢ One-Shop Tourism Experiences

Develop one-shop tourism experiences (hotel, food, activities, entertainment) for different tourism products in association with local businesses and the local community:

- Nature and Cultural Tourism package – 3 to 7 days experience with lodging, food, and a touristic itinerary included with visits to the most iconic parks, palaces, museums, the village of Sintra, and the "hidden spots" of the destination.

- Adventure Tourism package – 3 to 7 days experience with lodging, food, equipment, and transportation between the different sports locations. This package is designed to include 1-2 days of water sports (e.g. surf, canoeing, stand up paddle, bodyboard), 1-2 days of land sports (e.g. BTT, climbing, caving, horse riding) and 1-2 days of air sports (e.g. rope courses, hang gliding, paragliding) depending on the chosen duration of the package. In addition, consumers can choose to spend all 3 to 7 days practicing only water, land or air sports.

- Gastronomic Tourism and Enotourism package – 3 to 7 days experience with lodging, food and wines, and activities included such as gastronomic experiences in the local restaurants, wine tasting, and visits to vineyards.

- Golf Tourism package – 3 to 7 days experience with lodging, food, transportation, golf courses, site tours, and free entry in events and activities in Sintra included.

9. Communication

The communication strategy of a tourism destination appears to be more complex than products and services due to the existence of several core, qualifying, and in-development products, as well as different targets for each product.

9.1. Public Relations

Goal 1: Increase Sintra's reputation as a romantic and mysterious destination having a diversity of attractions both cultural and natural, strong and established gastronomic products and a rich wine tradition.

Strategy 1: Educate and inform Sintra's visitors by promoting engaging messaging and content that portraits an eloquent picture of the destination.

Tactics:

- Develop communication materials to attract, educate and inform on Sintra's newly identified visitor profiles and their preferred travel interests;
- Associate with media and influencers who identify with the new destination personas to attract the new visitor profiles;
- Stage thematic media events around each visitor profile.
- Through storytelling, create attractive and engaging communication material that exposes visitors to emotion, particularly the romance of Sintra.

Strategy 2: Increase the awareness of Sintra's gastronomy tourism and enotourism and transform them in differentiator factors of the destination.

Tactics:

- Create press releases focused on the gastronomy and wines of Sintra to both trade and consumer media outlets;
- Develop relationships with gastronomy and wine blogs such as "Casal Mistério", "All Garfo", and "Copo de 3";
- Develop creative communication materials that convey the experience of memorable and unforgettable moments associated with the gastronomy and wines of Sintra;
- Create a connection between the local gastronomy, the history and the people of Sintra through storytelling, and drive up emotion through it;
- Through storytelling promote the different gastronomic experiences that consumers can have in Sintra highlighting the diversity of dishes, as well as

the diversity of venues to eat (e.g. palaces, in-town restaurants, traditional shops);

- Create multi-sensory gastronomic experiences, evoking all five senses of visitors.

Strategy 3: Promote the golf tourism of Sintra.

Tactics:

- Create familiarization trips for media to showcase the diversity of golf courses and amenities in Sintra;
- Develop relations with event organizers for visits to ensure golf groups and golf-related events;
- Create a golf calendar and communicate it with the local community and tourism sector.

Strategy 4: Increase the awareness of Sintra's in-development tourism products, particularly health and wellness tourism and residential tourism.

Tactics:

- Develop press releases focused on health and wellness tourism and residential tourism to both trade and consumer media outlets;
- Conduct bi-weekly pitches to the press to increase the media interest on health and wellness tourism and residential tourism.

Strategy 5: Promote events and business tourism in the municipality of Sintra.

Tactics:

- In cooperation with Parques de Sintra Monte da Lua create press releases highlighting the opportunities to have events in the monuments managed by this entity;
- Build a reputation of expertise in different industries to attract the business tourism segment;
- Create press releases that showcase traditional local businesses and their products and promote them with the creation of events that showcase them to the local community and visitors;
- Create a Local Meetings Hero Award for a local resident or business leader who brought or kept a meeting for Sintra.

Strategy 6: Differentiate Sintra by promoting its diverse and distinctive tourism products to increase the destination's visitor appeal.

Tactics:

- Create individual media familiarization trips based on the major destination products: Nature, Adventure, Culture, Gastronomy, Wines, Golf, Health and Wellness, Residential, Events and Business tourism;
- Collaborate with local businesses to create co-operative media familiarization trips to salient the tourism quality of Sintra;
- Develop communication materials that showcase the diversity of tourism products and the romance of Sintra as a tourism destination.

Goal 2: Build high-impact awareness and strong recall for Sintra's new brand architecture.

Strategy 1: Launch the new brand resorting to high-profile publications and special events.

Tactics:

- Develop creative media, consumer and trade events showcasing the new brand identity and Sintra's appeal to a variety of visitor profiles;
- Develop press releases showcasing the new brand identity with special emphasis on the romance and mystery of Sintra.

Strategy 2: Leverage Sintra's "Capital of Romanticism" slogan by reinforcing its emotional appeal.

Tactics:

- Include messaging reinforcing the emotional appeal of Sintra in all communications, events and outreach initiatives.

Goal 3: Decrease the tourism seasonality and increase visitors' overnight stays.

Strategy 1: Develop fully integrated, targeted marketing campaigns to attract visitors to Sintra during low demand periods.

Tactics:

- Promote the one-stop shopping tourism product packages and target them to the specific visitor profiles.

Strategy 2: Convert day-trippers into overnight leisure visitors to increase leisure travel spending in the destination.

Tactics:

- Create a campaign focused on overnight visitation for the local community;
- Develop pre and post meeting hotel packages to encourage business travelers to extend their stay in the destination in order to turn a business trip into a leisure getaway.

Goal 4: Increase consumers' confidence on Sintra as a safe tourism destination.

Strategy 1: Develop content that reflect the safety and hygiene measures taken by Sintra's tourism industry.

Tactics:

- Create press releases that inform visitors and all remaining stakeholders of the safety measures adopted by the municipality of Sintra such as the Clean & Safe stamps for all museums and libraries of Sintra;
- Create media familiarization trips to showcase all health and hygiene protocols, regulations, certifications, and guidelines for Sintra's tourism industry.

9.2. Virtual Presence and Social media

The virtual presence plan for the promotion of Sintra as a tourism destination needs to be redesigned. It is advised that the webpages "Visit Sintra" and "Sintra Capital do Romantismo" are combined to confer a higher degree of clarity of information to consumers. In these two webpages there is a lot of information that should be condensed in one internet site.

Goal 1: Create an appealing and exciting visual brand for Sintra.

Strategy 1: Develop a destination storytelling strategy to improve visitors' awareness and engagement.

Tactics:

- Develop a destination brand story and communicate it via video, user-generated content, social media and website;
- Create a long-format, web series film showcasing the Sintra lifestyle and destination tourism attractions.

Strategy 2: Develop new social media events and create a new merchandise for the tourism of Sintra.

Tactics:

- Encourage influencers to take selfies with merchandise to increase awareness and engagement;
- Create contests for social media followers to take creative selfies with the merchandise;
- Communicate the ideal "Selfie Stops" for social media users (e.g. cabo da roca, pena palace, "Piriquita").

Strategy 3: Create attractive visual content.

Tactics:

- Create a photo library that showcases the beauty and diversity of the natural and cultural attractions of Sintra;
- Create videos, boomerangs and GIFs of Sintra and optimized them for each social media platform
- Create visual content using drones to capture the essence of Sintra;
- Create the Annual Sintra Official Inspiration Guide, a communication material distributed to future visitors to help them plan their trip.

Goal 2: Increase social media engagement and followers.

Strategy 1: Develop the relationships with social media influencers.

Tactics:

- Create influencer trip packages associated with specific interests and visitor profiles to promote Sintra;
- Develop relations with local influencers and salient the authenticity of Sintra as a tourism destination;
- Allow influencers to post directly on Sintra's social media to share their experience with consumers and encourage influencers to use the Instagram Story feature to improve Sintra's social media exposure.

Strategy 2: Improve the relationship, engagement and awareness of social media followers.

Tactics:

- Encourage social media users to tag photos and videos with "romanticSintra", "adventureSintra", "VisitSintra";
- Create a social media competition for photographers and reward the winner (contestant with the most likes in the photo) with a two-day trip in Sintra;
- Create more live social media content with live streams, Facebook Live, Instagram Stories;
- Share and post visitors generated content on official digital channels (website and social media);
- Develop content demonstrating what visitors love about Sintra with photos, videos, travel recommendations and quotes from them.

Strategy 3: Inspire travelers with in-depth communication of the tourism products.

Tactics:

- Create monthly-focused communication for each tourism product, such as nature tourism or enotourism;
- Hand out one trip per month inspired by the tourism product featured on social media;
- Promote the products of Sintra with appealing publications that include photos and videos on Facebook, Instagram, and Pinterest.

Strategy 4: Highlight the businesses and local community of Sintra.

Tactics:

- Create social media content showcasing the local community and businesses of Sintra and a behind the scenes look of the tourism destination with photos, videos, "day-in-the-life" content, testimonials, and Instagram story takeovers by local businesspeople and local community.
- Create a e-Newsletter with information on the performance of tourism in Sintra, accomplishments of the tourism sector businesses, future events, and places to visit;
- Create social media giveaways vouchers for events, trips and travel packages.

Goal 3: Decrease the tourism seasonality and increase visitors' overnight stays.

Strategy 1: Develop fully integrated, targeted marketing campaigns to attract visitors to Sintra during low demand periods.

Tactics:

- Promote the product packages developed for one-stop shopping and target the specific visitor profiles;
- Submit new articles, social media posts and blog content to influencers to increase the exposure of Sintra as a tourism destination;
- In partnership with local businesses, create a social media campaign "Sintra - A place for all" to encourage consumers to visit traditional establishments by giving 10% discounts for groups of 3 or more visitors in restaurants and museums.

Strategy 2: Increase the awareness of the events happening in Sintra.

Tactics:

- Showcase important events of Sintra such as gastronomic, cultural, adventure and entertainment events;
- Create a new meetings website with planner and attendee content;
- Develop a fully branded collection of marketing materials for conference services targeting meeting attendees and inspiring longer stays and engagement in various in-destination activities;
- Create new augmented reality and virtual reality experiences to provide real-life destination experiences for meeting planners to understand the destination from a remote location (virtual site visits).

Strategy 3: Position Sintra as a "must see" destination.

Tactics:

- Create campaigns and develop engaging visuals for Sintra with creative photos and videos;
- Develop touristic itineraries with the most "instagramable" spots of Sintra to attract millennials and younger generations;
- Create virtual reality tours of the monuments, parks, museums, landmarks (e.g. "Piriquita", Cabo da Roca) in partnership with Parques de Sintra Monte da Lua to showcase and increase the awareness of Sintra during the pandemic.

Goal 4: Increase consumers' confidence on Sintra as a safe tourism destination.

Strategy 1: Develop content that reflect the safety and hygiene measures taken by Sintra's tourism industry.

Tactics:

- Create social media content that inform visitors and all remaining stakeholders of the safety measures adopted by the municipality of Sintra such as the Clean & Safe stamps for all museums and libraries of Sintra;
- Partner with influencers to showcase all health and hygiene protocols, regulations, certifications, and guidelines for Sintra's tourism industry;
- Publish informational campaigns, industry reports, forecasts, and surveys to all stakeholders.

9.3. Advertising

Goal 1: Strengthen the new Sintra brand with communication material that reflect the transformed destination.

Strategy 1: Target the established visitor profiles to increase awareness and desire to visit Sintra.

Tactics:

- Maximize brand exposure using targeted branding mediums such as television, radio, online videos and printed media;
- Create target messaging based on visitor profiles specific to certain tourism products;
- Develop radio partnerships to promote the destination, increase overnight stays and support major events.

Strategy 2: Increase the awareness on Sintra's tourism products.

Tactics:

- Develop niche market communication materials such as Guide to Golf and Wedding Guide and promote them on radio, television and printed media;
- Fully integrate the brand story and brand-related elements into all customer facing communications, marketing, tradeshows and digital efforts;
- Support and promote local events with marketing and sponsorship;
- Advertise on radio, television and printed media the diversity and quality of the gastronomy and wines of Sintra.

Strategy 3: Develop the business tourism segment from industries that can benefit from Sintra's local resources, businesses and expertise.

Tactics:

- Create focused marketing strategies for the most prominent industries in the business tourism segment of Sintra;

- Advertise the most important events on media, specifically on radio, television and printed media;

- Create and advertise events that promote local businesses and their products via radio, television, and printed media to the local community and visitors;

- Develop a marketing camping to reach meeting planners at all phases of the decision cycle to generate positive brand awareness of Sintra as a premier meetings destination.

Fonts

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Annexes

Annex A - Selected Indicators of Destination Competitiveness (Dwyer & Kim, 2003)

Table 1 Selected Indicators of Destination Competitiveness

Endowed Resources
Natural
ˊ   Comfortable climate for tourism
ˊ   Cleanliness/Sanitation
ˊ   Natural wonders/Scenery
ˊ   Flora and fauna
ˊ   Unspoiled nature
ˊ   National parks/Nature reserves
Culture/Heritage
ˊ   Historic/Heritage sites and museums
ˊ   Artistic/Architectural features
ˊ   Traditional arts
ˊ   Variety of cuisine
ˊ   Cultural precincts and (folk) villages
Created Resources
Tourism infrastructure
ˊ   Accommodation quality/variety
ˊ   Airport efficiency/quality
ˊ   Tourist guidance/information
ˊ   Local transport efficiency/quality
ˊ   Visitor accessibility to natural areas
ˊ   Convention/Exhibition facilities (capacity/quality)
ˊ   Food services quality/variety
Range of activities
ˊ   Water based
ˊ   Nature based
ˊ   Adventure activities
ˊ   Recreation facilities
ˊ   Sports facilities
Shopping
ˊ   Variety of shopping items
ˊ   Quality of shopping facilities
ˊ   Quality of shopping items
ˊ   Value for money of shopping items
ˊ   Diversity of shopping experiences
Entertainment
ˊ   Amusement/Theme parks
ˊ   Entertainment quality/variety
ˊ   Nightlife
Special events/festivals

Supporting Factors
General infrastructure
ˊ Adequacy of infrastructure to meet visitor needs ˊ Health/Medical facilities to serve tourists ˊ Financial institution and currency exchange facilities ˊ Telecommunication system for tourists ˊ Security/safety for visitors ˊ Local transport systems ˊ Waste disposal ˊ Electricity supply
Quality of service
ˊ Tourism/Hospitality firms which have well defined performance standards in service delivery ˊ Firms have programmes to ensure/monitor visitor satisfaction ˊ Visitor satisfaction with quality of service ˊ Industry appreciation of importance of service quality ˊ Development of training programmes to enhance quality of service ˊ Speed/Delays through customs/immigration ˊ Attitudes of customs/immigration officials
Accessibility of destination
ˊ Distance/Flying time to destination from key origins ˊ Direct/Indirect flights to destination ˊ Ease/Cost of obtaining entry visa ˊ Ease of combining travel to destination with travel to other destinations ˊ Frequency/Capacity of access transport to destination
Hospitality
ˊ Friendliness of residents towards tourists ˊ Existence of resident hospitality development programmes ˊ Resident support for tourism industry ˊ Ease of communication between tourists and residents
Market ties
ˊ Business ties/trade links with major tourist origin markets ˊ Sporting links with major tourist origin markets ˊ Ethnic ties with major tourist origin markets ˊ Religious ties with major tourist origin markets ˊ Extent of foreign investment in local tourism industry

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Destination Management

Destination management organisation

- NTO acts as coordinating body for private and public sector tourism organisations
- NTO effectively represents views of all tourism stakeholders in tourism development
- NTO liaises effectively with private sector in tourism policy, planning and development
- NTO provides statistical information as input to tourism policy, planning and development
- NTO strategically monitors and evaluates the nature and type of tourism development

Destination marketing management

- Reputation of NTO
- Effectiveness of destination positioning
- Strength/Clarity of destination image
- Efficient monitoring of destination marketing activities
- Effective packaging of destination experiences
- Links between destination tourism organisations and travel trade
- NTO identification of target markets
- NTO strategic alliances with other NTO
- Destination marketing is based on knowledge of competitor products
- Present 'fit' between destination products and visitor preferences

Destination policy, planning, development

- Existence of formal long-term 'vision' for tourism industry development
- Destination 'vision' reflects resident values
- Destination 'vision' reflects tourism industry stakeholder values
- Tourism policy conforms to a formal destination 'vision'
- Tourism planning and development conforms to a formal destination 'vision'
- Tourism development is integrated into overall industrial development
- Ongoing tourism development is responsive to visitor needs
- Extent to which research findings are integrated into tourism planning and development
- Inventory of most significant attractors, facilities, services and experiences offered in destination
- Identification of major competitors and their product offerings
- Community support for special events

Human resource development

- Public sector commitment to tourism/hospitality education and training
- Private sector commitment to tourism/hospitality education and training
- Training/education responsive to changing visitor needs
- Range/quality of tourism/hospitality training programmes

Environmental management
ˊ Public-sector recognition of importance of 'sustainable' tourism development
ˊ Private sector recognition of importance of 'sustainable' tourism development
ˊ Existence of laws and regulations protecting the environment and heritage
ˊ Research and monitoring of environmental impacts of tourism

Situational Conditions

Competitive (micro) environment
ˊ Domestic business environment in destination
ˊ Management capabilities of tourism firms and organisations
ˊ Extent of competitive rivalry between firms in domestic tourism industry
ˊ Level of cooperation between firms in destination tourism industry
ˊ Links between tourism/hospitality firms and firms in other industrial sectors
ˊ Entrepreneurial Qqualities of local tourism stakeholders
ˊ Access to venture capital
ˊ Tourism/hospitality firms operate in ethical manner
ˊ Firms use computer technology/commerce to achieve competitive advantage

Destination location
ˊ Perceived 'exoticness' of location
ˊ Proximity to other destinations
ˊ Distance from major origin markets
ˊ Travel time from major origin markets

Global (macro) environment
ˊ The global business context
ˊ Political stability
ˊ Legal/Regulatory environment
ˊ Government policies for tourism development
ˊ Economic conditions in origin markets
ˊ Sociocultural environment
ˊ Investment environment for tourism development
ˊ Technology changes

Price competitiveness
ˊ Value for money in destination tourism
ˊ Exchange rate
ˊ Air ticket prices from major origin markets
ˊ Accommodation prices
ˊ Destination package tour prices
ˊ Price of destination visit relative to competitor destinations

Safety/Security
ˊ Level of visitor safety in destination
ˊ Incidence of crimes against tourists in destination

Demand Factors
˃ Destination awareness ˃ Destination perception ˃ Destination preferences
Market Performance Indicators
Visitor statistics (numbers) ˃ Number of foreign visitors ˃ Growth rate of foreign visitors ˃ Market share of destination – world, regional ˃ Shifts in market share ˃ Average length of stay ˃ Rate of revisit
Visitor statistics (expenditure) ˃ Expenditure of foreign visitors (FX receipts) ˃ Growth rate of expenditure of foreign visitors ˃ Share of destination in total tourism expenditure – world, regional ˃ Shifts in expenditure share ˃ Foreign exchange earnings from tourism as percentage of total exports
Contribution of tourism to economy ˃ Contribution of tourism to value added (absolute values and percentages, and rate of growth) ˃ Domestic tourism ˃ International tourism ˃ Contribution of tourism to employment (absolute numbers; percentage of total employment and rate of growth) ˃ Domestic tourism ˃ International tourism ˃ Productivity of tourism industry sectors
Indicators of economic prosperity ˃ Aggregate levels of employment ˃ Rate of economic growth ˃ Per capita income
Tourism investment ˃ Investment in tourism industry from domestic sources ˃ Foreign direct investment in tourism industry ˃ Investment in tourism as percentage of total industry investment (and trend)
Price competitiveness indices ˃ Aggregate price competitiveness indices ˃ By journey purpose ˃ By tourism sector

Government support for tourism
- Budget for tourism ministry
- Budget for NTO
- NTO expenditure on destination marketing (comparison with competitors)
- Support for transport infrastructure
- Industry programmes accessed by tourism industry
- Tax concessions
- Subsidies to industry
- Export marketing assistance
- Vocational education skills/training for tourism industry

Annex B - Press Freedom Index, Portugal (Johnson, 2020)
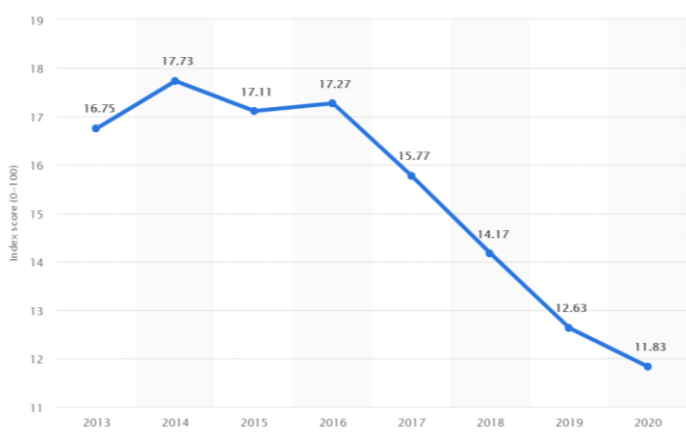
Annex C - Business Freedom Index, Portugal (TheGlobalEconomy.com, 2020)
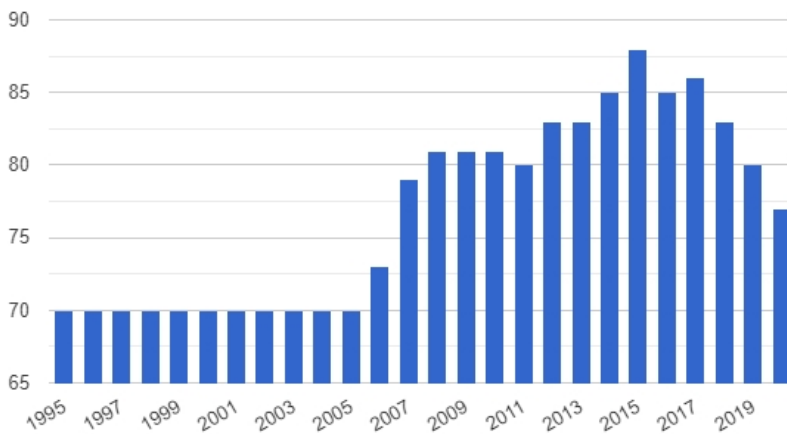
Annex D - Labor Freedom Index, Portugal (TheGlobalEconomy.com, 2020)
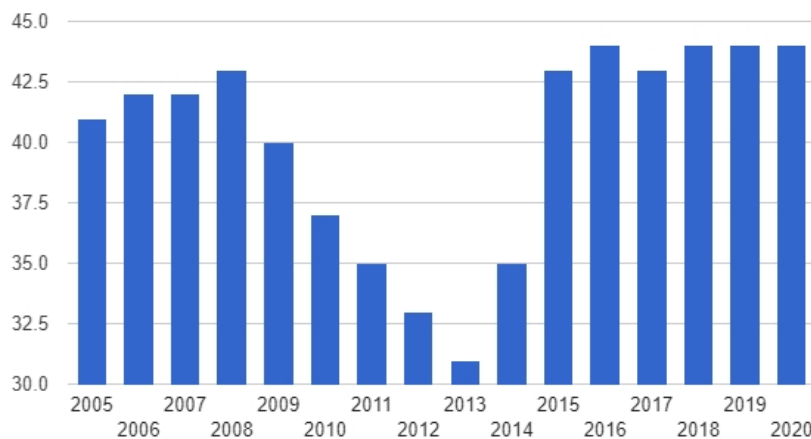
Annex E - Trade Freedom Index, Portugal (TheGlobalEconomy.com, 2020)
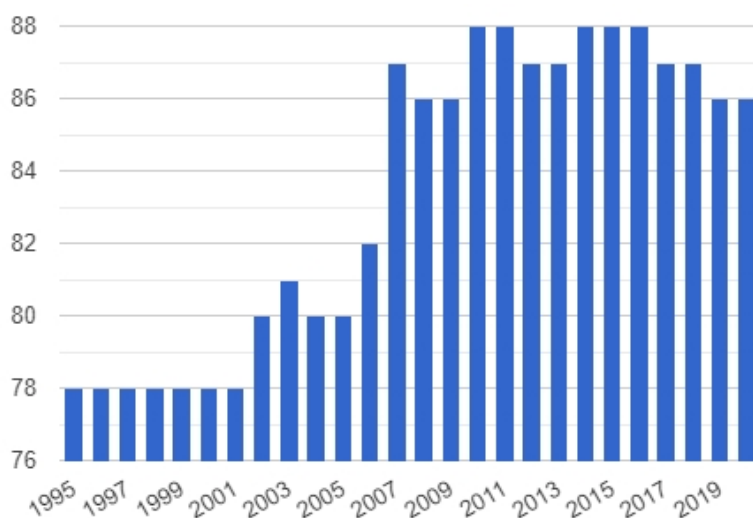
Annex F - Medium Disposable Income, Portugal (Varzim, 2020)

Quadro II.2.1 • Rendimento mensal das famílias, pré e pós-pandemia: impacto no curto prazo, após medidas de apoio ao rendimento

| | % do total de famílias | Rendimento disponível médio (em euros) | | Rendimento do trabalho líquido médio (em euros) | | Variação (em %) | | Por memória: |
		Pré-pandemia	Pós-pandemia c/ medidas de apoio ao rendimento	Pré-pandemia	Pós-pandemia c/ medidas de apoio ao rendimento	Rendimento disponível	Rendimento do trabalho líquido	Percentagem de famílias com rendimentos do trabalho
Total	100,0	1566	1482	871	800	-5,3	-8,2	67,9
Percentil do rendimento disponível								
<=20	20,0	407	398	97	89	-2,4	-8,6	34,1
20-40	20,0	846	824	329	310	-2,7	-5,9	55,2
40-60	20,0	1256	1214	680	644	-3,3	-5,3	75,9
60-80	20,0	1769	1679	1085	1008	-5,1	-7,1	87,2
80-90	10,0	2442	2301	1521	1400	-5,8	-7,9	85,6
>90	10,0	4665	4301	2813	2501	-7,8	-11,1	89,2
Idade do indivíduo de referência								
<35	9,8	1410	1319	1025	947	-6,4	-7,6	94,9
35-44	19,3	1735	1566	1338	1193	-9,8	-10,9	96,8
45-54	20,3	1835	1728	1335	1243	-5,8	-6,9	94,0
55-64	18,4	1731	1650	1072	1002	-4,7	-6,5	79,8
65-74	16,0	1432	1408	225	204	-1,7	-9,3	28,7
>=75	16,2	1065	1059	51	46	-0,6	-10,8	9,8

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Annex G - World Population (United Nations, 2020)
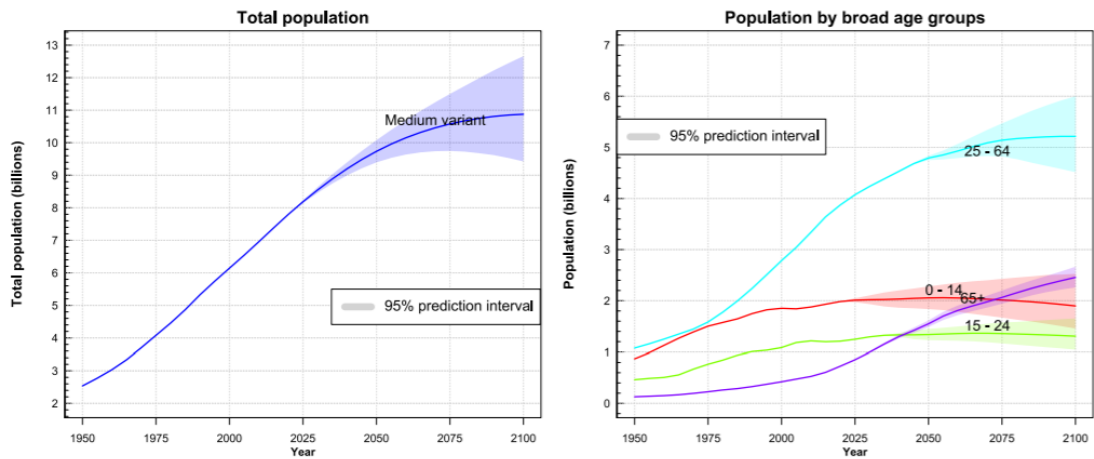
Annex H - European Population (United Nations, 2020)
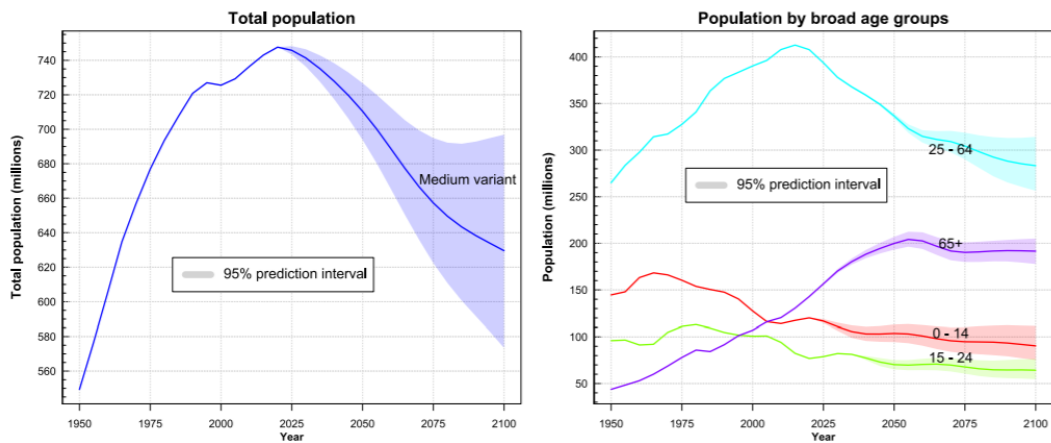
Annex I - Portuguese Population (United Nations, 2020)

98
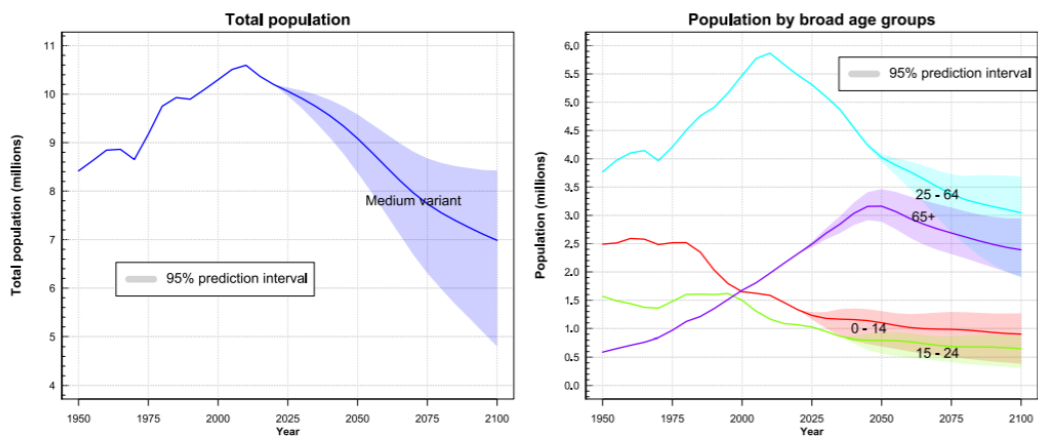
Annex J - Average Profile Followers Distribution, Instagram and Facebook (Chaffey, 2020)

Average Profile Followers Distribution by Age and Gender
Instagram Profiles of Brands

Page Followers by Age and Gender

■ Male ■ Female

Average Page Fans Distribution by Age and Gender
Facebook Pages of Brands

Page Fans by Age and Gender

■ Male ■ Female
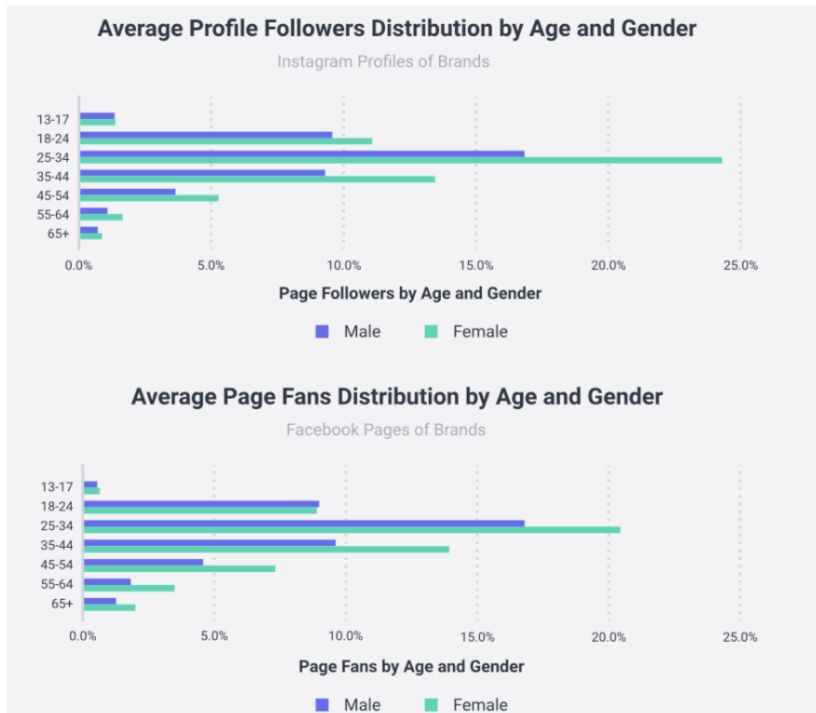
Annex K - Sustainable Development Goals (United Nations, 2020)

Annex L - Online Survey

Total number of answers: 186

1. Rate the following factors when choosing a tourism destination? (1 - Not very important; 5 - Very important)

	1	2	3	4	5
Security and hygiene	○	○	○	○	○
Nature	○	○	○	○	○
Culture	○	○	○	○	○
Gastronomy and wines	○	○	○	○	○
Golf	○	○	○	○	○
Beaches	○	○	○	○	○
Adventure sports	○	○	○	○	○
Weather	○	○	○	○	○

Obtained Answer:
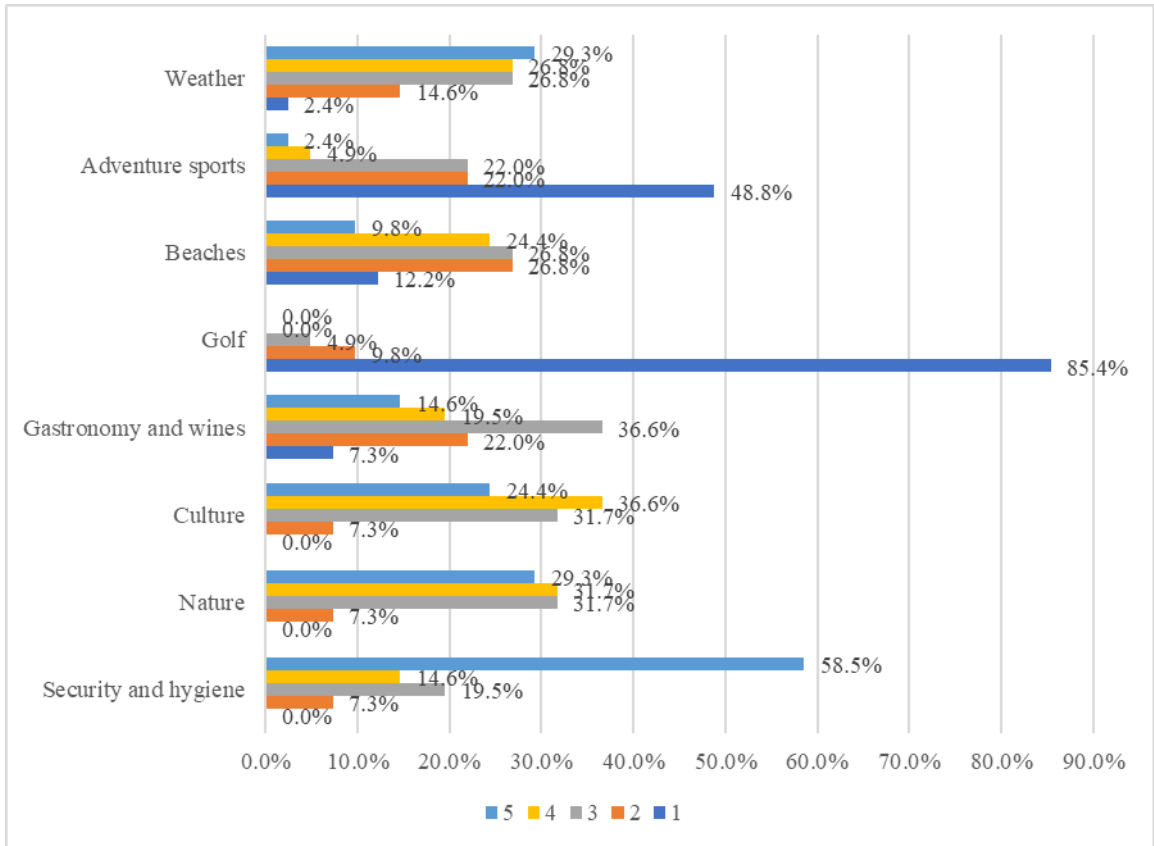
2. In addition to the above factors, what elements are important when choosing a tourism destination?

Obtained Answer:
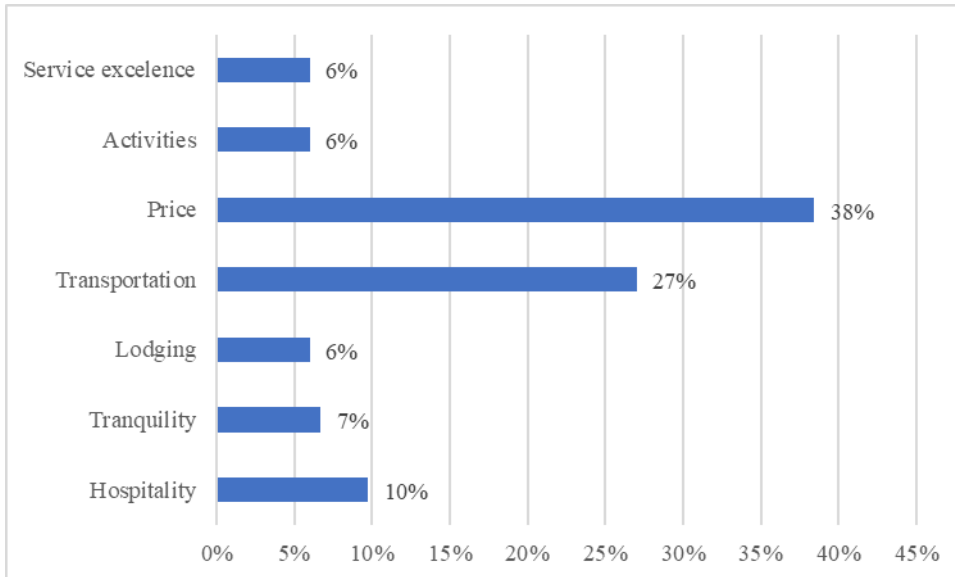
3. What importance do you attribute to each of the following factors when choosing a tourism destination? (1 - Little importance; 5 - Very important)

	1	2	3	4	5
Social Networks	◯	◯	◯	◯	◯
Friends and family	◯	◯	◯	◯	◯
Promotional campaigns	◯	◯	◯	◯	◯

Obtained Answer:
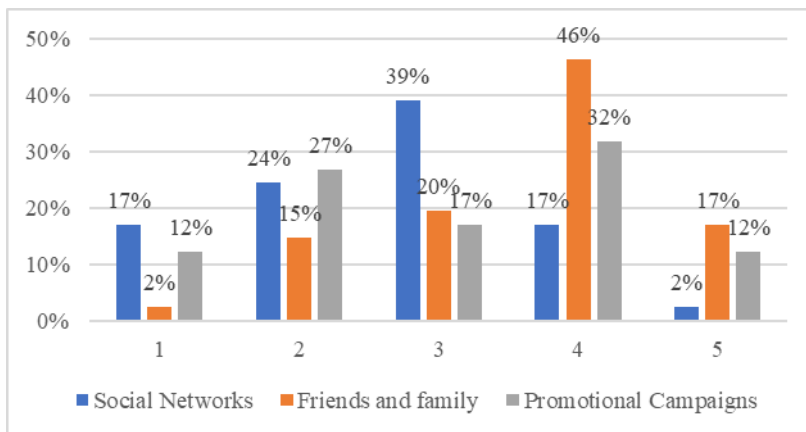
4. Where would you like to go on vacation this year?

◯ In Portugal

◯ Outside Portugal

◯ I won't go on vacation this year

Obtained Answer:
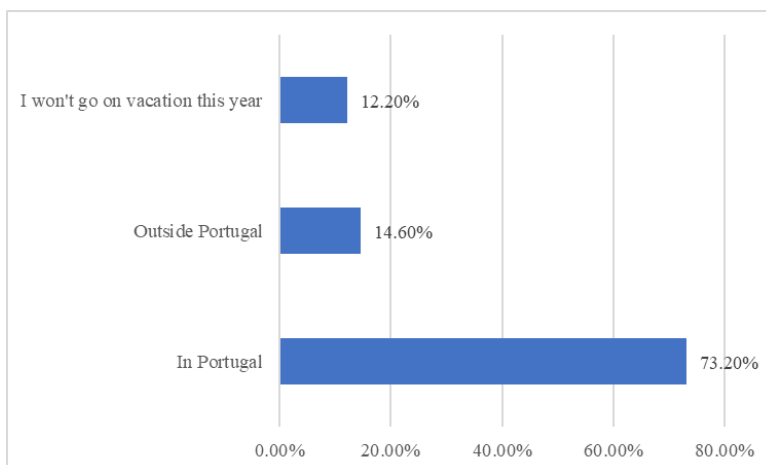
5. Have you ever seen a promotional campaign for the tourism of Sintra? How effective was it?

○ Yes, not very effective

○ Yes, effective

○ Yes, very effective

○ No

Obtained Answer:
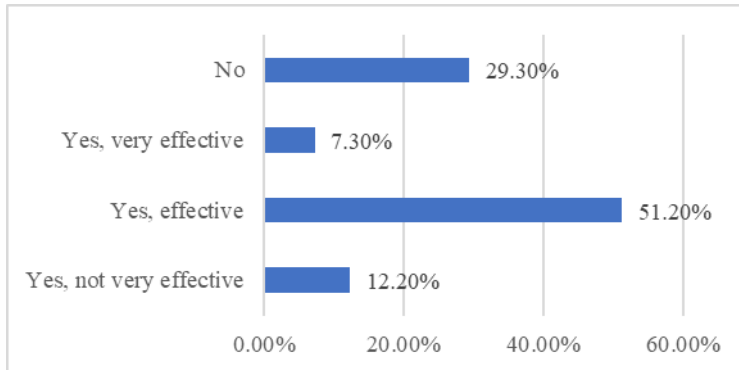
6. Did you know that Sintra was classified as a UNESCO World Heritage Site?

○ Yes

○ No

Obtained Answer:
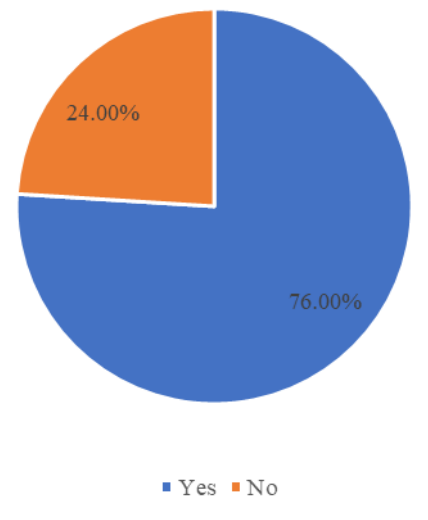
7. Have you ever visited Sintra?

○ Yes

○ No

Obtained Answer:
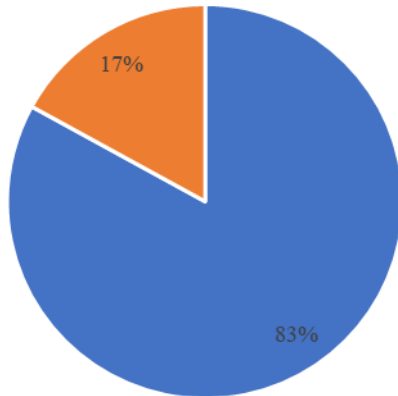
■ Yes ■ No

8. Where did you stay?

○ Local Accommodation

○ Hotel

○ I didn't stay the night

○ Other: _____

Obtained Answer:
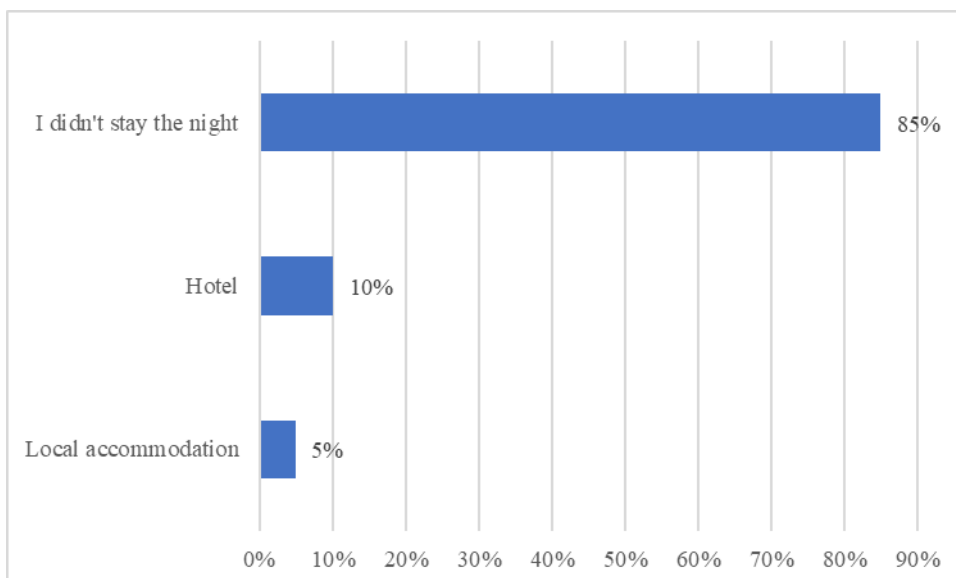
9. How do you rate the offer of accommodation and restaurants in Sintra (1 - Very poor, 5 - Excellent)?
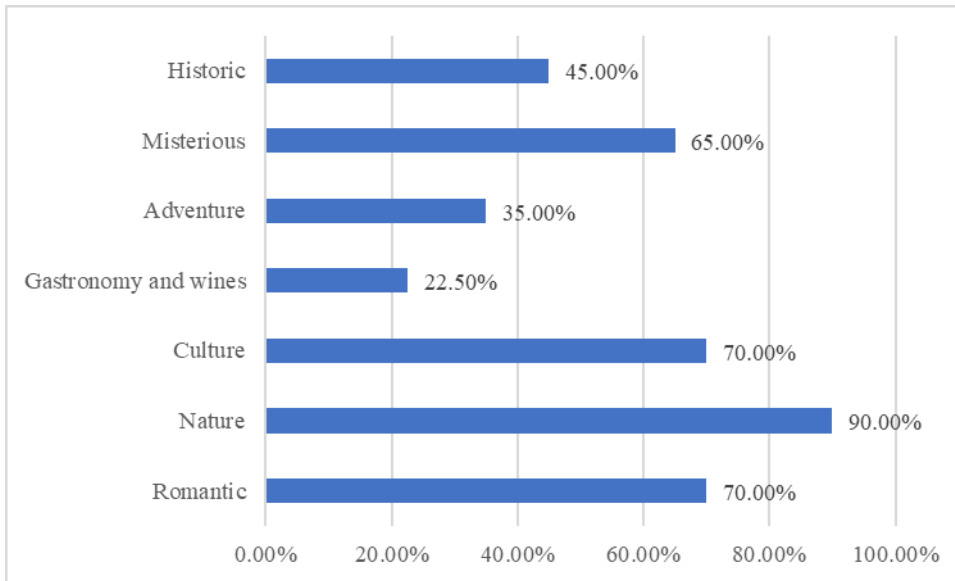
	1	2	3	4	5	I don´t know
Accommodation	○	○	○	○	○	○
Restaurants	○	○	○	○	○	○

Obtained Answer:
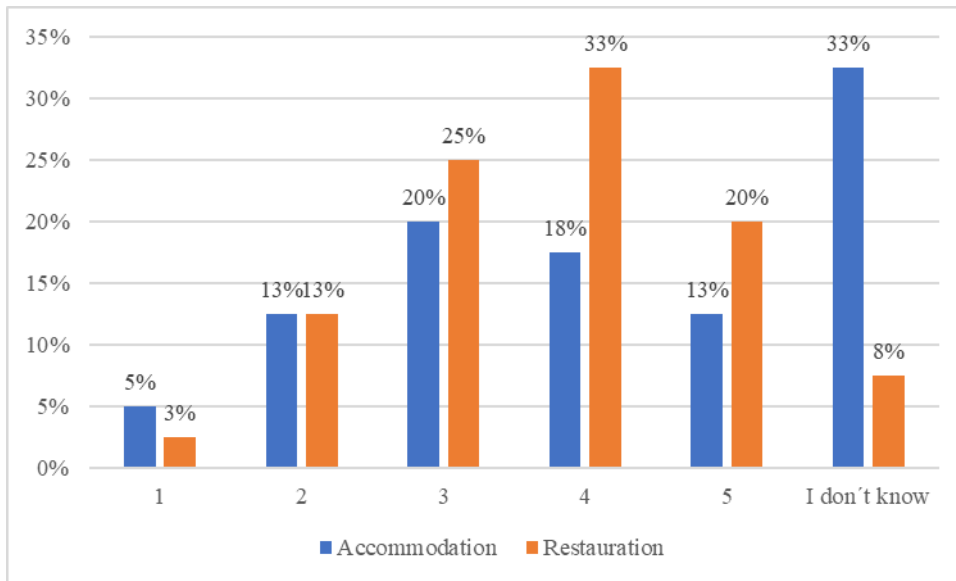
10. What terms would you use to describe Sintra?

☐ Romantic

☐ Nature

☐ Culture

☐ Gastronomy and wines

☐ Adventure

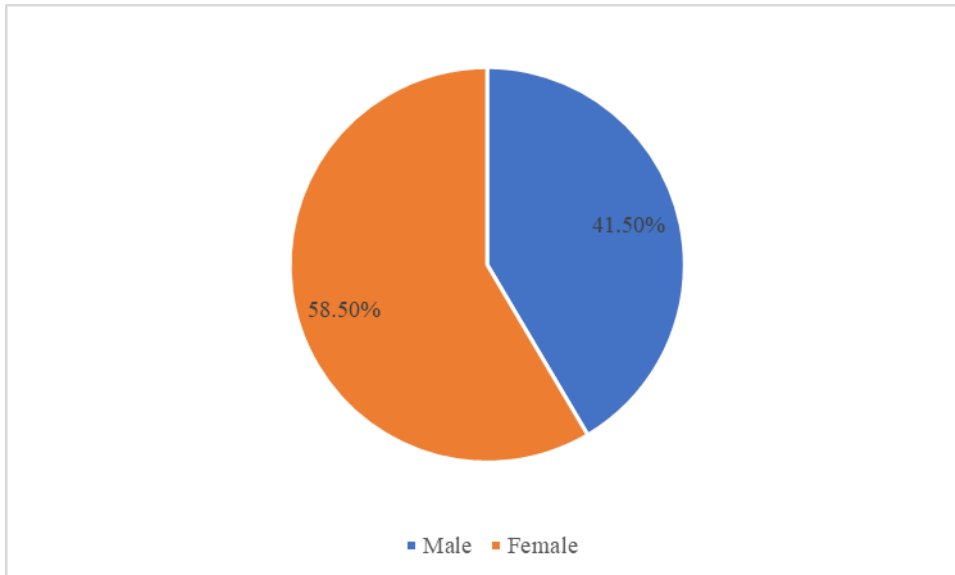☐ Other: _____

Obtained Answer:

11. Gender

◯ Male

◯ Female

Obtained Answer:

12. Age

- ○ < 16
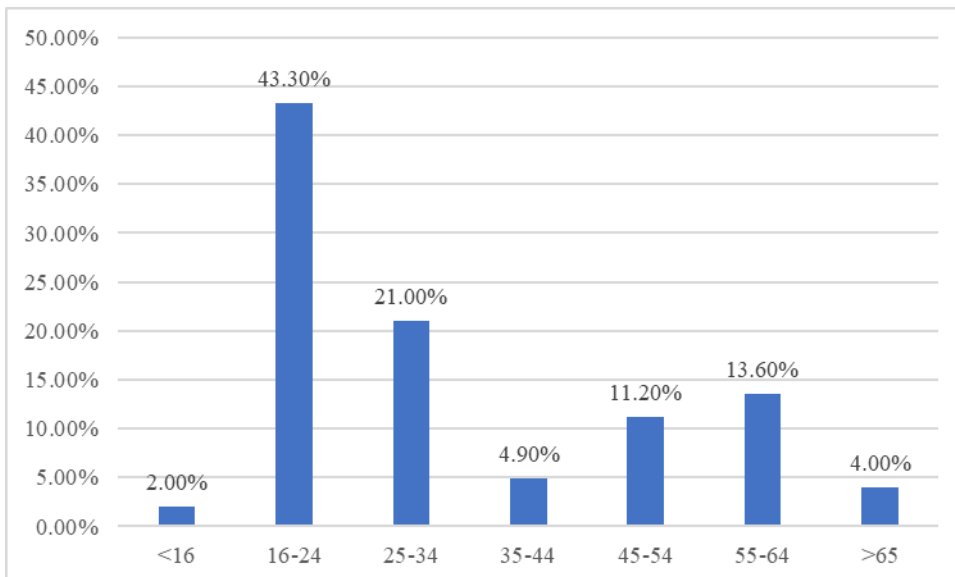- ○ 16 - 24
- ○ 25 - 34
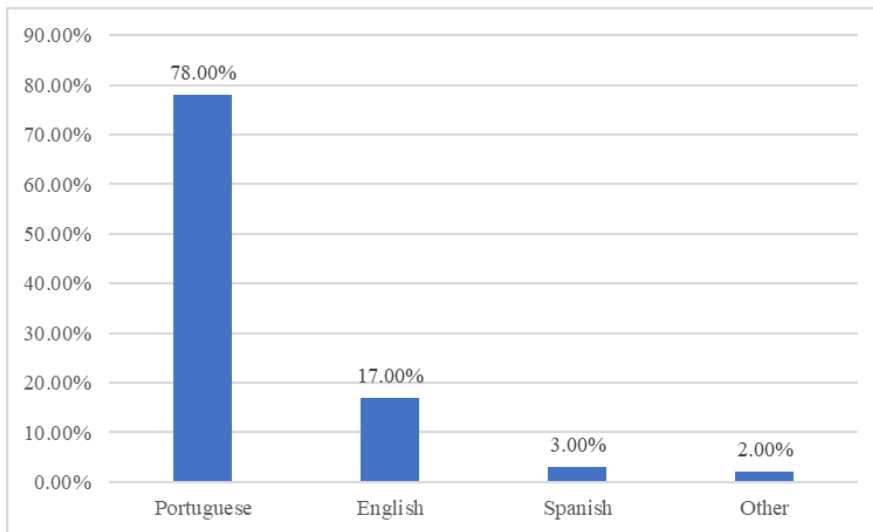- ○ 35 - 44
- ○ 45 - 54
- ○ 55 - 64
- ○ > 65

Obtained Answer:

13. Nationality

- ○ Portuguese
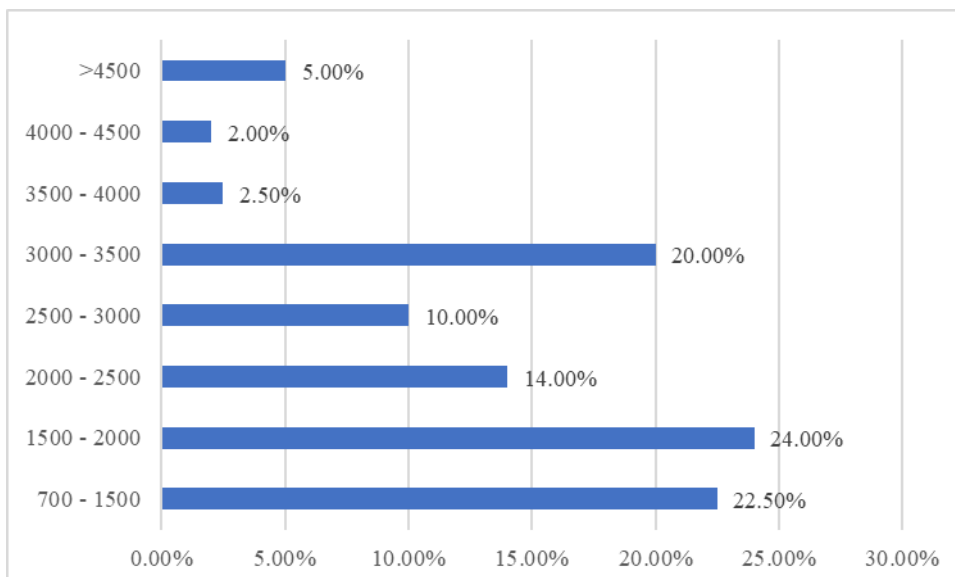- ○ English
- ○ Spanish
- ○ Other: _____

Obtained Answer:

14. Average household income

◯ 700€ - 1500€

◯ 1500€ - 2000€

◯ 2000€ - 2500€

◯ 2500€ - 3000€

◯ 3000€ - 3500€
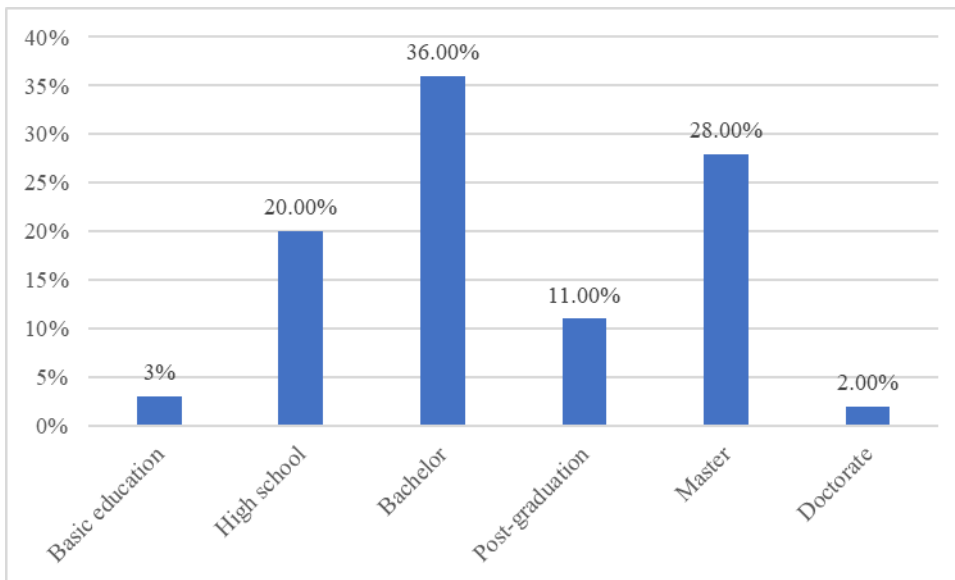
◯ 3500€ - 4000€

◯ 4000€ - 4500€

◯ > 4500€

Obtained Answer:

15. Literary abilities

○ Basic education

○ High school
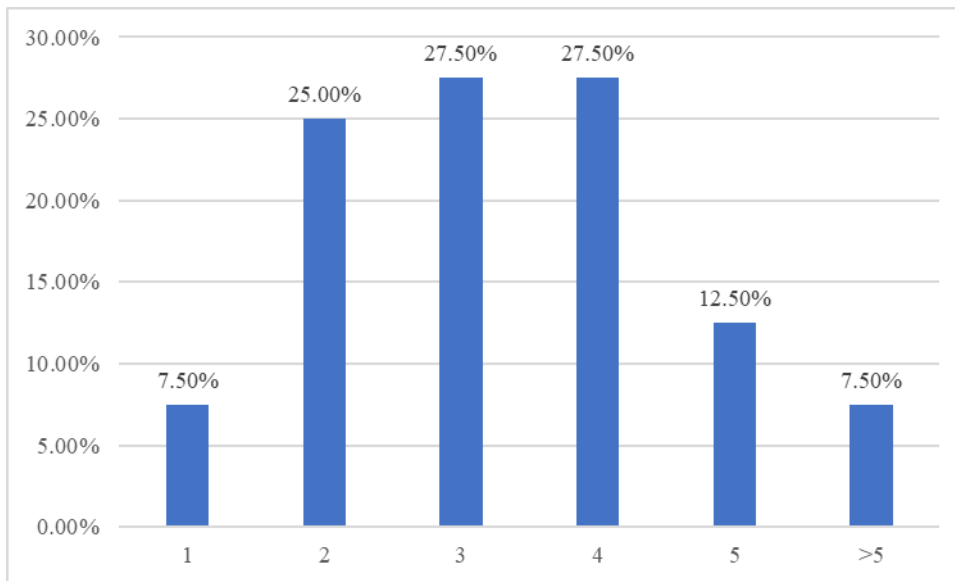
○ Bachelor

○ Post-graduation

○ Master

○ Doctorate

Obtained Answer:

16. Household composition (number of people)

○ 1

○ 2

○ 3

○ 4

○ 5

○ >5

110

Obtained Answer:

Annex M - Core Products and Complementary Products, Sintra (Visit Sintra, 2020)

Core Products	Monuments	Countess of Edla Chalet, Capuchos Convent, Monserrate Palace, Moorish Castle, National Palace of Pena, National Palace of Queluz, Sintra National Palace, Regaleira Palace and Estate.
	Museums	Air Museum, Anjos Teixeira Museum, Ferreira de Castro Museum, Klaus Ohnsmann Museum, Leal da Câmara House Museum, MU.SA – Sintra Museum of the Arts, News Museum, S. Miguel de Odrinhas Archaeological Museum, Science Workshop of Sintra, Sintra Myths and Legends, Sintra Natural History Museum.
	Parks and Gardens	Liberty Park, Monserrate Park, Pena Park, Picnic Park, Quinta da Ribafria Gardens.
	Viewpoints and Waterfalls	Anços Waterfall, Azenhas do Mar Viewpoint, Beckford Waterfall, Cabo da Roca, Correnteza Viewpoint, Cruz Alta Viewpoint, Ferraria Viewpoint, Fervença Waterfall, Pisões Waterfall, Santa Eufémia Viewpoint, São Martinho Churchyard Viewpoint, Seteais Viewpoint, Vigia Viewpoint.
	Beaches	Adraga beach, Aguda beach, Azenhas do Mar beach, Grande beach, Maçãs beach, Magoito beach, Pequena beach, Samarra

		beach, São Julião beach, Ursa beach, Vigia beach.
Complementary Products	Sports	Air: Rope Courses, Hang Gliding, Paragliding. Earth: Birdwatching, BTT, Hiking, Cycling, Climbing, Caving, Orienteering, Horse Riding, Abseiling. Water: Bodyboard, Canoeing, Stand Up Paddle, Surf.
	Golf	Belas Country Club, Lisbon Sports Club, Penha Longa – Atlântico, Pestana Beloura Golf.
	Gastronomy	Fofos de Belas, Negrais Piglet, Queijadas de Sintra, Travesseiros.
	Wines	Colares Wine, Beira-Mar Wine Cellar, Casal Santa Maria, Colares Regional Wine Cellar, Ramilo Wines, Villa Vergani, Visconde de Salreu Cellars, Viúva Gomes Wine Cellar
	Tram	
Routes	1 Day	From Sintra to the Coast, From Sintra Train Station to Regaleira Palace and Estate, Monuments Route
	2 Days	Between the Coastline and the Historic Center, From the Mountains to the Atlantic Coast
	3 Days	The Coast and the Saloia Region

Annex N - Business Tourism Venues and Maximum Capacity (Sintra Romantica, 2020)

Business Tourism Venues and Maximum Capacity	Hotel	Lawrence's Hotel (45), Hotel Tivoli Sintra (220), Hotel Palácio de Seteais (300), Hotel Miramonte (60), Pousada D. Maria I (70), Hotel Arribas (230), Penha Longa Hotel & Golf Resort (570), Pestana Sintra Golf Resort & Spa Hotel (230), Vila Galé Sintra Resort Hotel (505)
	Monuments	Regaleira Estate (200), Valenças Palace (100), Queluz National Palace (500), Sintra National Palace (200), Monserrate Palace (150), National Palace of Pena (250)
	Museums	Anjos Teixeira Museum (30), Ferreira de Castro Museum (40), Leal da Câmara House Museum (40), S. Miguel de Odrinhas Archaeological Museum (100), Sintra Natural History Museum (100).
	Other	Olga Cadaval Cultural Center (950), Penedos House (600), Youth House of Sintra (109), Sintra Municipal Library (70), António Silva Municipal Auditorium (188), Regional Winery of Colares (200), Teatroesfera (114)