

**STRATEGIC PLANNING FOR TOURISM DESTINATIONS:
PROPOSALS FOR THE TOURISM DEVELOPMENT OF MAFRA MUNICIPALITY****Rúben José Pereira Feijão**Estoril Higher Institute for Tourism and Hotel Studies, 2769-510 Estoril, Portugal
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ABSTRACT

Purpose: The project seeks to comprehensively study tourism in Mafra, focusing on destination planning and management processes. It aims to identify gaps for rectification and investment opportunities to enhance the destination's tourism sector.

Methodology: The study uses theoretical frameworks in tourist destination planning, considering emerging consumer trends. It analyzes the tourism system geographically and surveys tourists to gather insights into their experiences in Mafra. With 398 responses collected, it offers valuable perspectives on the destination's appeal from the consumer's viewpoint.

Findings: Through data analysis, a concentration of tourism supply and demand is evident in the area studied, alongside identified issues like road and parking conditions, and tourism professionals' competencies. This has led to the structuring of development axes to address gaps and utilize existing advantages.

Research Limitation: The study identifies strengths and weaknesses for long-term development but overlooks some data, like main market profiles, limiting targeted product definition. It focuses only on overnight tourists, excluding other visitors and tourism players. Future research should involve more stakeholders for a better grasp of tourism dynamics.

Value of paper: The study measures tourist satisfaction and identifies key factors impacting their experience, guiding the local government in crafting tourism strategies, particularly given Mafra's absence of a tourism plan.

KEYWORD: Strategic Planning; Tourism Development; Mafra.

1. INTRODUCTION

The tourism sector, as one of the most humane and humanized economic activities, has been showing significant expression on the global stage, with a persistent growth trend. Alongside the development of tourism, there is a significant resilience across the entire activity, evidenced by the effects that crises have had on the sector and by its swift recovery in preceding periods (UNWTO, 2010; UNWTO, 2015; UNWTO, 2020a; UNWTO, 2024).

The vast diversity of the Portuguese territory gives it an exponentially attractive character, particularly through its cultural and natural heritage, hospitality, and the extensive range of tourist resources and economic activities. These components shaping Portugal as a destination are essential ingredients that highlight the country's competitiveness in tourism (DGPM, 2012; DGPM, 2020; MEE, 2013; Turismo de Portugal (TP), 2017).

Portugal's geographical location, despite being on the periphery of the European continent, is also a factor that enhances Portugal's competitiveness as a tourist destination due to its proximity to a significant portion of the main markets, contributing considerably to the sustained development of the national tourism activity. It is also noteworthy that Portugal's Atlantic frontage and proximity to other continents, such as Africa and the Americas, as well as the existence of maritime routes to and from the Mediterranean, further enhance its competitive position (Turismo de Portugal (TP), 2015; DGPM, 2012).

Taking into account the strategic advantages of Portugal as a destination, the most relevant document for national strategic planning and management outlined strategic actions that, based on the country's diagnosis, defined development goals for national tourism with a focus on 10 strategic products that ensured the competitive position of tourism (MEE, 2013). Among these strategic products, it is safe to say that the sun and sea product is the most expressive and representative of Portugal's image, initially being at the forefront of motivations that directed flows to this destination and reflecting the concentration of demand during the summer months (Órtigão, 2014; Pordata, 2024a).

At the regional level, particularly in the Lisbon region, where the capital city enhances the notoriety of the entire surrounding area, there is a consistent and widespread increase in tourist demand in the Lisbon Metropolitan Area (LMA). Within the LMA, particular attention should be given to municipalities with significant tourist demand, such as Cascais and Sintra (Prodata, 2024b). Cascais and Sintra municipalities have been tourist attraction hubs within the Lisbon region, boasting a robust offering of natural and cultural heritage, resources, and tourist services of various types, from the most modest to the most luxurious, thus allowing to cater to different market segments and meeting the growing demand. These sub-destinations have consolidated products such as meetings and incentives, sun and sea, golf, nature, events, and wine tourism, in the case of Cascais, and surfing, golf, nature, culture, and wine tourism in the case of Sintra (ERTRL, 2019).

In Mafra Municipality (MM), nestled between Lisbon and the Central Regions, despite rising demand, there are limitations in tourist offerings, hindering its development (Pordata, 2022a; Pordata, 2024c). Unlike neighboring areas, Mafra relies mainly on surfing, nature, and culture, stressing the need for new offerings to improve both quality and quantity. While Ericeira benefits from its World Surfing Reserve status and recent UNESCO heritage qualifications, Mafra's tourism is concentrated around surfing. Despite cultural attractions, Mafra lags compared to Sintra, diverting tourists to more diverse destinations (ERTRL, 2019).

Despite these challenges, Mafra's destination management has implemented strategies aimed at improving the quality of its offerings. These strategies focus on promoting the region's identity, enhancing connectivity among tourism stakeholders, improving offerings, developing the Mafra brand, and ensuring destination sustainability, with a focus on culture and surfing (Quatenaire, 2015). The study suggests that Mafra has the potential to develop sub-products within its consolidated

products, diversifying its tourist offerings and attracting new segments, ultimately increasing the average length of stay (Pordata, 2024d).

Thus, the significance of this study on Mafra lies in the increasing dependence of the business fabric on surfing as a sub-product, despite some cultural expression. It reflects asymmetries between the development of coastal parishes compared to those in the interior of the municipality and underscores a resilience that may appear weak if a more attractive destination for the surfing segment emerges (Feijão, 2023).

2. LITERATURE REVIEW

STRATEGIC PLANNING FOR TOURISM DESTINATIONS

In the field of strategic planning, three levels are identified: strategic, tactical, and operational. These levels differ in terms of Decision Focus, Decision-Making Level, Focus, Time Horizon, Degree of Uncertainty or Certainty, and Complexity. At the highest level focused on the entire company or destination is strategic planning, where strategic decisions are defined by top management to achieve competitive advantage. These decisions have a medium to long-term temporal profile, increasing uncertainty and complexity (e.g., entering new markets, launching new products, investments, and competition control) (Evans, 2015; Silva, 2017).

The definition of strategy involves three key components: Determining long-term basic objectives; Adopting action measures to achieve the defined objectives; Allocating necessary resources for the actions, which can be financial, physical, human, or intangible (e.g., intellectual). Thus, the strategy process encompasses three phases: Strategic Analysis, Strategic Selection, and Strategic Implementation (Evans, 2015).

After recognizing tourism as an activity of interest for destination development, objective setting should ensure they are specific, measurable, achievable, realistic, and time-bound (SMART). In other words, they should be concrete, measurable, attainable, realistic, and time-defined to assess goal achievement/non-achievement (UNWTO, 2007; Silva, 2017; Fletcher, et al., 2018).

After setting objectives, following the recognition of tourism as an activity of interest for destination development, it is important to conduct a market study. This study involves collecting data about the surrounding environment and the tourism reality during the timeframe corresponding to the execution of this study, also known as strategic analysis and/or diagnosis of the geographical and tourism territory (UNWTO, 2007; Fletcher, et al., 2018; Silva, 2017; Evans, 2015).

Based on the gathered information, a strategic approach to ensuring competitiveness is formulated, defining the strategic direction and methods to be applied. This process culminates in establishing the destination's vision and planning. The vision should be developed alongside development objectives and target selection, involving all stakeholders to create a consensus base for efficient strategic development. The vision should be inspiring, imaginative, achievable, consistent, participative, and serve as a guiding factor for stakeholders, ensuring accountability and resource allocation for implementation (Silva, 2017; Evans, 2015; UNWTO, 2007; Ritchie & Crouch, 2000; Dwyer & Kim, 2003).

Next is the definition of the desired destination positioning, outlining the approach of value proposition arising from differentiation of offered products compared to competitors, reflecting the destination's market positioning and its image (UNWTO, 2007; Dwyer & Kim, 2003).

The current planning process in Portugal adopts a forward-looking approach, guiding the transition of development models coherently. This contrasts with past reactive approaches, which resulted in concentration issues driven by market impulses and lacked guidance across different sectors. Given the accelerated pace of today's dynamics, predicting and planning future development strategies becomes increasingly challenging. However, planning plays a crucial role in improving

modifications by systematically evaluating strengths, weaknesses, opportunities, and threats, identifying viable alternatives, maximizing stakeholder support, mobilizing efforts toward common goals, and ensuring efficient resource allocation (Cunha, 2013; Mason, 2008; Evans, 2015; Ritchie & Crouch, 2003).

The development plan creation involves drafting multiple alternatives assessed for potential economic, physical, and sociocultural impacts. The most beneficial alternative is then selected, forming the basis for a unified development plan (Fletcher, et al., 2018).

Planning is crucial to identify present and future needs of tourist facilities, facilitating structured development of related facilities and infrastructure across vast geographical areas. It serves as a link between strategy and action, integrating organizational actions to coordinate tourism's multidisciplinary effectively. An integrated plan may include actions like spatial route development, critical infrastructure, tourist information systems, new products, and promotion. Involving all stakeholders in planning aims to ensure fair distribution of tourism benefits and preserve resources to promote well-being of local communities and social and environmental sustainability (Williams, 2008; UNWTO, 2007; Fletcher, et al., 2018).

The implementation phase of the plan, or tourism policy, follows, where the strategy's guidelines are put into action. For successful implementation, three aspects must be considered: resources (human, financial, equipment, buildings, and intangible or intellectual); the configuration of culture and organizational structure, involving alignment across the organization regarding vision, mission, and objectives; and managing fundamental changes for the proper implementation of the strategy (UNWTO, 2007; Fletcher, et al., 2018; Evans, 2015; Mason, 2008; Ritchie & Crouch, 2000).

As a final factor, the relevance of having destination performance monitoring tools is highlighted. These tools serve to identify possible deviations from the plan and its objectives, as well as to identify contextual changes arising from the increasingly expressive and sudden dynamics of an increasingly globalized world (e.g., catastrophes, pandemics, crises, new motivations) that justify the reformulation of these elements to ensure the destination's competitive position in the market (UNWTO, 2007; Fletcher, et al., 2018; Ritchie & Crouch, 2000; Silva, 2017; Middleton & Hawkins, 1998).

The trend toward smart tourism destinations accompanies the evolution of cities, integrating innovation and technology into tourism offerings. These destinations leverage cutting-edge technologies to establish a symbiotic relationship with socioeconomic, cultural, and environmental aspects. They incorporate intelligent systems to capture, analyze, and utilize information in real-time, facilitating visitor interaction with the territory and assisting destination management in decision-making. The ultimate goal is to increase efficiency and enhance the quality of visitor experiences continually (Sánchez, 2017).

A smart tourism destination utilizes information collection and utilization to continuously enhance management, promotion, and the quality of offerings for digital tourists. Achieving this requires stakeholder coordination and dynamic information sharing through technological platforms aiding decision-making. Three key technological solutions for this purpose include: i) end-user internet service systems; ii) Internet of Things; iii) cloud computing (Buhalis & Amaraggana, 2013; Sánchez, 2017).

To highlight the potential of technology integration in smart destinations, six dimensions of usefulness are identified across various tourism system fields: interpretation, planning, sustainability, guidance, promotion, and feedback. Proper integration of these dimensions improves the quality of offerings and enhances the alignment between visitor needs and destination resources (Buhalis & Amaraggana, 2013).

COMPETITIVENESS

The genesis of understanding competitiveness lies in the field of economics, where it was initially argued that competitiveness stems from labor capacity and specialization, aiming for productive efficiency. This commercial perspective was complemented by differentiation, suggesting that each nation should diagnose its available resources and, based on this assessment, determine which products to specialize in to compete in the global economy (Smith, 1776; Ricardo, 1817; Samuelson & Nordhaus, 2010).

The conceptualization of the economic model (Ricardian Comparative Advantages) proved insufficient to explain competitiveness in a globalized context, leading to the emergence of Porter's conceptualization (Porterian Competitive Advantages), which highlighted that production is not the sole factor of competitiveness. Thus, comparative advantages are not enough to assert a destination's competitiveness (Porter, 1990; Hong, 2008).

Competitiveness is the ability to conceive, produce, distribute, and market effectively, ensuring long-term resource utilization returns and asserting differentiation from each destination's competitive advantages. This positions each nation in specific products/services in an area, specializing to compete in an increasingly globalized world (Hong, 2008; Crouch & Ritchie, 1999; Enright & Newton, 2005).

Going beyond the economic model, destination competitiveness is more strongly linked to strategic ability than to natural conditions, allowing destinations with limited resources to be more competitive than those where they abound, if they make effective use of the means at their disposal. For this, there is a need for holistic management of tourist destinations, encompassing economic, business, environmental, and social management, involving all stakeholders in political strategies, sharing benefits and responsibilities among all stakeholders (Fletcher et al., 2018; Ritchie & Crouch, 2003).

Due to tourism's multidisciplinary nature and numerous influencing variables, there's no universal agreement on destination competitiveness conceptualization in the scientific community. Main research has focused on destination image and attractiveness, emphasizing visitor-valued attributes like natural, cultural, and functional resources, thus adopting a demand perspective (Dimoska & Trimcev, 2012; Bonn, Joseph & Dai, 2005; Gallarza, Saura & García, 2002; Hou, Lin & Morais, 2005; Hsu, Wolfe & Kang, 2004; Hu & Ritchie, 1993).

Results from the supply perspective cover arrivals, stay duration, revenue, and market share, reflecting supply competitiveness and management, with a focus on economic and environmental resources (Buhalis, 2000; Fletcher et al., 2018). Ideally, both views merge for a comprehensive view of tourism competitiveness, incorporating indicators like creativity, innovation, entrepreneurship, cooperation, sustainability, motivation, empowerment, inclusion, investment appeal, resident welfare, and bureaucracy. A competitive destination boasts profitable tourism, market strength, an attractive environment, satisfying experiences, and community benefits (Novais, Ruhanen & Arcodia, 2018; Pike, 2008; Ritchie & Crouch, 2003).

Given the immense complexity of managing a tourist destination, a methodology of indicators and guidelines is considered essential to measure numerous aspects deemed fundamental to ensuring the competitiveness of a tourist destination. As previously discussed, competitiveness involves comparative advantages, competitive advantages, and also strategic management, which requires a methodology allowing for the construction and evaluation of effective competitiveness. Guidelines for designing and evaluating tourism competitiveness indicators are a field already explored by several authors (Crouch & Ritchie, 1999; Hassan, 2000; Heath, 2003; Dwyer & Kim, 2003; Dwyer, et al., 2004; Crouch, 2011; Dupeyras & MacCallum, 2013).

To illustrate, in a generic manner, the central components of competitiveness, Porter (1990) devised a model with four properties, representative of competitive advantage. This model includes:

production conditions, infrastructure, and labor capacity; demand conditions; supporting industries; strategy, structure, and rivalry among firms.

Porter's model expanded the understanding of competitiveness by moving beyond comparative advantages to include strategic determinants. This contributed significantly to identifying the variables shaping destination competitiveness, allowing Crouch & Ritchie (1999) to delve deeper into this area. They differentiate competition levels, addressing companies, products, industries, national economies, and expand Porter's (1990) proposal to include territory, stakeholders, and tools.

The analysis by Crouch & Ritchie (1999) drew upon Porter's (1990) approach and delved into the competitive management of tourist destinations, resulting in a destination competitiveness model. It outlines the structural variables of competitiveness at this level, encompassing the transactional and contextual environment, attractions and supporting resources (e.g. accessibility, infrastructure, businesses, basic services), core resources and attractions (e.g. history, culture, events, activities), destination management (e.g. organization, communication, marketing), and qualifying determinants (e.g. location, safety, cost).

Hassan (2000) proposes a tourism sustainability model involving public/private sectors, NGOs, and resident groups. It emphasizes environmental, social, and economic sustainability through impact assessments, transportation capacity, legislative frameworks, and cultural preservation aligned with resident, traveler, and investor ideals.

Heath (2003) presents a metaphorical perspective on sustainable tourism competitiveness, likening it to building a dwelling. "Foundations" encompass elements sustaining competitiveness like hospitality, authenticity, and safety. "Cement" represents connecting links such as communication channels and stakeholder collaboration. "Bricks" signify fundamental aspects like sustainable development policies and destination marketing strategies. Finally, the "Roof" symbolizes key drivers of success such as a common tourism vision, leadership, and political will.

Crouch & Ritchie (1999) propose a model aiming at destination competitiveness, identifying it as the primary objective of underlying processes. Dwyer & Kim (2003) expand on this, linking competitiveness to socioeconomic prosperity, improving local living standards. The model evaluates natural and cultural resources, infrastructure, policy, industry, structural conditions, and tourist demand, using indicators to measure competitiveness in each component. Achieving competitiveness ensures surpassing rivals, leading to socioeconomic prosperity and improved resident quality of life.

Dupuyeras e MacCallum (2013) present eleven tourism indicators: GDP contribution, visitor spending, overnight stays, service exports, labor productivity, purchasing power, visa rules, natural and cultural assets, visitor satisfaction, and national tourism plan. They also highlight market diversification, employment demographics, price index, air connectivity, and OECD Better Life Index. Future indicators include budget allocation, business mortality, e-tourism, and supply chain structure.

TOURISM PRODUCTCS CONCEPTION

In destination product structuring, diversification and concentration are key practices alongside clusters. Diversification offers various activities and experiences, adjusting to demand and customization. It can be parallel or integrated, with separate entities or cooperation. Concentration focuses on specific products for a coherent destination image (Benur & Bramwell, 2015). The diversification strategy benefits from offering travelers the possibility of customization, allowing them to consume products that best match each individual's motivations. From the destination's perspective, this strategy enables the expansion of the product portfolio of a particular destination, as seen in the complementarity between sports tourism, nautical tourism, and sun and beach tourism, and even in diversification through completely different products (Benur & Bramwell, 2015).

The concentration approach benefits from encouraging tourism businesses to better understand the market in which they operate, from the ease of offering and coordinating infrastructure and support facilities, and by providing economies of scale, such as through standardized packages. It can also benefit local communities when tourism focuses on one or a few elements of their identity, highlights specific characteristics of local experiences, or portrays a positive image of the destination's identity. This approach can be competitive and sustainable if it ensures the distribution of benefits to communities and supports all key stakeholders (Benur & Bramwell, 2015; Getz, et al., 2012).

However, it is important to highlight that the lack of diversity in tourism products, images, and experiences in destinations can weaken the approach of customizing the offer in line with the diverse motivations of different market segments, making the product offering more rigid and thus limiting the destination's competitive capacity (Benur & Bramwell, 2015).

In selecting the strategy, it is important to manage the degree of product intensification. This product intensification can be characterized by mass tourism, where there is a large-scale activity focusing on a significant number of tourists, or niche tourism, which refers to tourist products for more restricted and/or specialized markets and a lesser need for infrastructure to accommodate these tourists (Benur & Bramwell, 2015).

There are, five ideal types of tourist products are mentioned: concentrated niche tourism, concentrated mass tourism, diversified niche tourism, diversified mass tourism, and the combination of mass tourism (e.g., Malta) and diversified niche tourism (e.g., Gozo) (Benur & Bramwell, 2015).

Tourist product development involves a four-stage production process. The initial stage utilizes primary resources like water, land, labor, and materials to create necessary infrastructure. The next phase involves facilities such as national parks, museums, hotels, and restaurants, which form the attractions and basic infrastructure. These lead to the service stage, offering accommodations, tours, and dining experiences. Finally, tourists consume these services, creating intangible but valuable experiences such as recreation and social interactions (Smith, 1994).

In tourist product development, strategic definition precedes the diagnostic phase, where internal and external destination analysis is conducted. This includes political, economic, socio-cultural, technological, environmental, and legal aspects (PESTAL), as well as resource assessment and understanding the destination's consumer profile. Following this, SWOT analysis, Ansoff matrix, and BCG matrix are employed to identify gaps and potentials, shaping offerings according to target market trends (UNWTO, 2011; Silva, 2017).

Through the analysis of the destination's offer and demand characteristics, it is possible to create tourist products by combining resources into clusters. These clusters involve adopting a business model consisting of segmentation, clienting, value system, and value production (Silva, 2017).

After the creation of clusters, it is essential to promote the competitiveness and commercial viability of products through physical planning and strategic planning. These plans should reflect the strategic options and development actions regarding each product, market, human resources, strategic and operational marketing, and the utilization of the potential of information and communication technologies (UNWTO, 2011; Silva, 2017).

3. MATERIAL AND METHODS

The initial phase of the investigation focused on identifying key issues, with a focus on destination planning and strategic management literature review. The second phase involved characterizing Mafra municipality geographically and from a tourism perspective, revealing growth in tourist activity, particularly in the coastal zone (especially Ericeira) and the town of Mafra. Strategic tools like SWOT analysis and TOWS Matrix were then applied to assess internal and

external contexts, identifying strengths and weaknesses and informing development strategies. Questionnaire surveys were chosen as the primary data collection method based on secondary data analysis.

In structuring the questionnaires, four fundamental areas were primarily addressed. One focused on the organization of the respondents' trips, another on their experience in the destination of Mafra. The third area addressed sustainable development, followed by respondent satisfaction, and finally, their characterization.

Through the questionnaire survey method, the following research objectives (RO) were aimed to be achieved: RO1 - Analyze tourism development trends and their impacts on MM; RO2 - Investigate the characteristics of the supply and hospitality by residents in the analyzed territory; RO3 - Characterize the tourist demand for the destination Mafra. Regarding the selection of respondents, travelers who stayed overnight in MM during the months of July and August 2022 were chosen.

The research methodology employed structured questionnaire surveys for primary data collection due to several advantages: representative sample, cost-effectiveness, anonymity, time-saving, and standardization of responses (Babbie, 2016; Bryman, 2012; Neuman, 2013).

The questionnaire, designed for overnight travelers in MM, comprises five sections: trip organization, MM destination experience, sustainable development, visitor satisfaction, and respondent characterization.

The structuring of the questionnaires was based on prominent references for primary data collection in tourist destinations, namely: Global Sustainable Tourism Council (2019), Dupeyras & MacCallum (2013), and Azores Tourism Observatory (2019).

The phase preceding the final application of the questionnaires took place between 01/06/2022 and 20/06/2022, during which a test version was conducted to assess the feasibility of the questionnaires and the adopted methodologies. Since the initial methodology focused solely on data collection through: i) tourist information centers; and ii) tourist accommodations and local lodging, and given the low participation of private agents in the development of this study, the selection of locations was narrowed down to: i) tourist information centers; and ii) collection in the busiest areas of MM. During this period, the need to reduce the number of questions to be applied to respondents was identified in order to facilitate data collection.

The final questionnaires were administered between 01/07/2022 and 31/08/2022, distributed across the tourist information centers of MM (Ericeira and Mafra) and the busiest areas in the Mafra region (Ericeira and Mafra). They were prepared in the languages that proved to be predominant in MM, namely: Portuguese, English, Spanish, and French.

In order to obtain a representation of the universe, the total number of guests hosted by MM in the year 2019 was considered, which amounted to 104,913 guests. For this universe, 383 individuals needed to be surveyed to achieve the sample size, and it was possible to validate 398 questionnaires.

4. RESULTS Data Analysis

Regarding the sample, 51.5% of visitors are female, while 48.2% are male. In terms of age, 23.6% belong to the "25 to 34 years" age group. If we widen the age range slightly, we find that 65.6% fall between the ages of "25 and 54 years". Regarding employment status, 46.7% of respondents are "employed" and 27.5% work "self-employed". Additionally, 63.1% of respondents reported having a "Higher" education level, while only 5.0% have "Basic" education.

The the highest volume of expenses in the Mafra destination is on "Accommodation" (33.3%), followed by "Food and Beverage" (30.7%) and "Entertainment" (27.9%). Respondents with a

monthly net income between "3001 and 4000 euros" represent 24.6%, while only 8.5% earn "less than 1001 euros".

Regarding the country of origin, we can observe that 30.7% of the sample are from Portugal, 19.3% from Germany, and 16.6% from the United Kingdom.

In terms of categories related to the type of accommodation where visitors are staying are sleeping, 42.2% are in hotels, while 26.1% mentioned staying in local accommodations.

Regarding the number of days of visit, 37.7% of respondents stated they would stay for 2 to 4 days, while 22.9% would stay for 8 to 10 days. Only 6.0% would stay for 1 day. Mafra was the first choice of visit for 54.5% of visitors, and 55.3% of visitors stated that it was their first visit to MM.

The trip planning for 22.4% of respondents was done with a lead time of 3 months or more, while 20.6% invested 1 month in this planning, and only 13.6% required no more than 1 week.

For 60.8% of respondents, "Rest and Leisure" were the main reasons for the trip. For 28.4%, it was visiting "friends/family", and for 10.3%, it was a "business trip".

It is observed that 35.9% of respondents travel with "Friends", 25.1% with "Family", and 19.6% "Alone". When respondents travel accompanied, "2 people" join them in 17.3% of cases, and only "1 person" in 13.6% of situations. It is worth noting that only 54.6% of respondents answered this question.

When asked how they came up with the idea of visiting MM, 38.7% stated it was through "recommendation from family/friends", while 29.1% mentioned it was through "previous travel experiences". Only 2.3% mentioned it was through "media advertisements, such as TV, radio, newspapers".

Regarding the experience in the Mafra destination, specifically regarding the availability of surf services in MM, 80.7% of respondents mentioned that they are "Very developed". For those who used surf services, 31.9% of visitors rated their quality as "Very developed", with a non-response rate of 35.2%.

Regarding the availability of other services alternative to surfing, 27.9% rated it as "4" and 25.1% as "5" on a scale of 1 to 5, where 5 indicates "Very developed".

As for the respondents' experience when visiting the Mafra destination, 86.7% stated that they can find surf experiences "Very easily". When asked if they can find and purchase products alternative to surfing, such as mountain biking and excursions, on a scale of 1 – Very difficult to 5 – Very easy, 25.9% gave a rating of "4", 25.6% "5", and 22.9% "3".

It is observed that "Surf" is the most prevalent tourist entertainment service in MM for 29.9% of visitors, followed by "Gastronomic tasting" (21.4%) and "Events" (16.4%).

When asked if they believe there is potential to create more diversified activities in the Mafra destination, 94.7% responded "Yes".

It was found that 50.3% of respondents would like to explore the rural aspect of the Mafra destination through participation in tourist activities. On the other hand, 38.4% revealed they were indifferent to this exploration, and 11.3% mentioned they have no interest in it.

In the following question: "How do you rate your satisfaction with the quality of certain attributes of the Mafra destination?", 86.4% of respondents mentioned it was "Very High" regarding "Landscape and nature", as well as 79.6% regarding "Gastronomy" and 78.4% regarding "Beaches".

Regarding territorial dispersion, it is observed that in MM, the areas respondents visited or intend to visit are "Ericeira" (36.8%) and "Mafra" (25.0%).

Regarding the existence of tourist service offerings in the interior of MM, 35.2% of those surveyed mentioned it was "Sufficient", although 29.1% referred to it as "Limited" and 15.1% as

"Very limited". In contrast, regarding the Coastal area, 57.8% of respondents mentioned that the availability of tourist services was "Very high".

Of the total respondents, 14.7% mentioned that "Tasting Local Gastronomy" was an activity they had or intended to undertake. "Surf/Paddle" came in second place with 12.1%, followed by "Nature Activities" with 11.7%.

It is observed that 58.6% of respondents found the experiences they had in the activities they participated in to be "Very satisfactory". Also, for 35.9% of them, the activities were rated as "High".

When asked about the likelihood of recommending the Mafra destination, 62.1% stated it was "Very likely" (rating 5) and 33.4% mentioned "likely".

In analyzing how respondents perceived the quality-price relationship of the Mafra destination, 48.7% referred to it as "Fair", 25.9% as "Cheap", and 20.6% as "Expensive".

In order to obtain a more detailed characterization of the profile of the markets visiting MM, countries with 5 or more visitors were selected, whose profile is expressed will be addressed in a future research. Through this market characterization, future studies can define strategies tailored to each of these segments, allowing for tailor-made measures.

Certainly, for the present study, it is important to identify the areas most valued and perceived as major gaps for the analyzed markets, as evidenced in table 1, which serves as an indicator for strategy definition.

Countries	Strengths	Level	%	Weaknesses	Level	%
Portugal	Landscape and Nature, Beaches	Very high	91.8	Road access and parking	Very low	27.0
Germany	Beaches	Very high	100.0	Road access and parking	Very low	6.5
United Kingdom	Hospitality	Very high	78.8	Road access and parking	Very low	13.6
France	Cleanliness and Safety	Very high	78.1	Language proficiency	Very low	9.4
Spain	Beaches, Landscape and Nature	Very high	77.4	Road access and parking	Very low	12.9
Netherlands	Landscape and Nature, Beaches	Very high	100.0	Road access and parking	Very low	13.0
USA	Gastronomy, Hospitality, Beaches, Landscape and Nature	Very high	88.9	Road access and parking	Very low	21.4
Sweden	Landscape and Nature, Beaches	Very high	100.0	Road access and parking	Very low	11.1
Canada	Gastronomy	Very high	100.0	Road access and parking	Very low	60.0

Table 1 - main fields for the respondents' experience

STRATEGIES IDENTIFIED FOR TOURISM DEVELOPMENT

In order to adhere to the strategic tourism development framework outlined by the UNWTO, addressing the question "Where do we want to be?" follows the competitive analysis of the territory under study, as elaborated in the preceding chapter. Consequently, this section will delve into the strategic aspects resulting from the diagnosis conducted on the territory, culminating in the definition of strategic axes and the corresponding action measures to provide an answer to the question "How do we get there?" (UNWTO, 2007).

VISION

A vision outlined for Destination Mafra aims to transform this territory into an accessible, inclusive, sustainable, creative, authentic, diverse, and quality-driven space, built upon its historical, cultural, and natural riches. The goal is to promote the experience of exploring the emblematic Mafra National Palace while also highlighting the rural landscape and experiences, as well as both soft and hard outdoor activities. Efforts will be directed towards offering quality tourist infrastructure and access, enhancing the skills of tourism workforce, fostering stakeholder collaboration in a network perspective, developing thematic routes and events that enhance local identity, boosting the local economy, attracting new investments, valorizing heritage, and incorporating and energizing the concept of a smart destination.

POSITIONING

In terms of positioning, Mafra should embody the image of a destination linked to nature and outdoor sports, cultural authenticity through the strong rurality that characterizes the landscape of the municipality's interior, as well as the traditional fishing art of the coastal area, natural and built heritage, sustainability, accessibility through roadways and parking, inclusion and multiculturalism through initiatives targeting niche market segments (e.g., people with disabilities, LGBTQI+, ethnicities, and digital nomads), entertainment diversity, creativity through creative routes, and as a modern and trendy destination.

To position Destination Mafra across segments, tailored promotion is essential. For outdoor sports tourism, target both soft and hard nature enthusiasts alongside surfing. Authenticity appeals to culture and lifestyle fans, linking with gastronomy, nature, and heritage. Sustainability communication highlights stakeholders' efforts across sustainability pillars, showcasing their impact.

Accessibility should be communicated after revitalizing access roadways to Mafra and resolving the parking issue evident in the village of Ericeira. MM should be seen as a destination close to Lisbon, easily accessible with good parking conditions, encouraging the movement of people from the city and thus revitalizing the local economy.

Concerning inclusion and multiculturalism, communication should run parallel to the communication tailored to target tourism types, and this theme, being sensitive, should not be presented in a discriminatory manner by itself. Instead, it should be combined with another type of tourism (e.g., outdoor tourism) and communicated in a combined and objective manner (e.g., inclusive outdoor activities – offering activities for all audiences).

Diverse entertainment and creative routes enrich Mafra's tourism, enhancing leisure options and boosting spending. Mafra should project a modern, tech-savvy, and vibrant image, appealing as a dynamic place to live, work, play, and enjoy sports. Embracing smart destination strategies aligns Mafra closer to Lisbon's connectivity than the West.

GENERAL OBJECTIVES

General objectives in a tourism development plan are broad and comprehensive goals aimed at serving as a strategic reference for the growth and progress of tourism in a particular territory. Thus, the general objectives are defined as follows:

- To benefit from the strategic position of MM within the Lisbon destination;
- To improve and consolidate the positioning of the two tourist poles of Ericeira and Mafra within the Lisbon destination, strengthening their respective brands;
- To organize and qualify other tourist products and experiences oriented towards various niche segments and articulated with the different poles of the Lisbon destination according to their

tourism vocation or specialization, allowing them to benefit from the resulting economies of scale;

- To promote the diversification and qualification of tourist services in Mafra at the level of accommodation, catering, tourist animation, and other supporting services for this activity (including transportation/mobility), in order to reduce asymmetries within the municipality and stimulate longer stays in it, across various segments of tourist demand;
- To consolidate, in a transversal manner, governance models in the tourism sector, ensuring a dynamic of increasing cooperation and coordination among the various stakeholders;
- To improve levels of professionalization and qualification of human resources in the tourism, hotel, and restaurant sectors;
- To promote communication and marketing consistent with and supportive of the strategic guidelines for strengthening MM's tourism positioning within the Lisbon Destination.

SMART OBJECTIVES (2023 – 2030)

SMART objectives are a commonly used approach to defining more specific and measurable goals. For the development of tourism in MM, the following SMART objectives have been defined:

- Increase tourism demand and revenue; Reduce seasonality;
- Increase the average length of stay; Expand the range of tourist services offered;
- Diversify the range of tourist services offered;
- Increase collaboration among stakeholders;
- Increase the range of tourist services offered in the interior area of MM;
- Increase by 40% the availability of 4 and 5-star tourist accommodations;
- Obtain a 40% stakeholder participation rate in the training sessions and workshops provided;
- Increase the number of events and activities focusing on the territory's endogenous and strategic products;
- Achieve a target of 50% stakeholder adoption of social, economic, and environmental sustainability measures;
- Achieve a target of 40% of stakeholders obtaining sustainability certifications;
- Achieve 10% of tourist services offerings framed under universal design principles, catering to all types of audiences and their respective limitations;
- Ensure monitoring of the activity of all tourism service providers;
- Adopt technological solutions to facilitate the sharing of information regarding services and attractions. The goal is to have 70% of stakeholders present with relevant information about their services, and 40% of attractions equipped with some form of solution allowing on-site interpretation (e.g., augmented reality);
- Strengthen the connection to the capital through improved transportation between Mafra and Lisbon.

STRATEGIC AXIS

Based on the diagnosis conducted in MM and the responses obtained through the questionnaires, strategic axes and their respective objectives have been developed to structure a Strategic Tourism Development Plan for MM (table 2).

1. Tourist Offer: expansion, diversification, and enhancement
2. Infrastructure: increasing and improving support resources
3. Natural and Cultural Resources: leveraging and valorizing heritage Development of New Products
4. Governance and Synergies: Promoting coordination among supply agents
5. Development of Sustainability and Smart Destination Measures
6. Communication and Strategic Marketing

For each strategic axis, measures and actions have been defined to achieve the objectives of the respective axis.

Axis	Lines				
Axis 1 Tourist Offer: Expansion, Diversification, and Qualification	Incentives for the Establishment of New Tourist Ventures	Monitoring and Evaluation of the Offer	Encouragement for Diversification of Activities Offered by Tourism Animation Agents	Development of Bike Routes	Development of Tourist Circuits
	Boosting Activities Developed in the National Tapada of Mafra	Promotion of Products and Creation of Attractions	Involvement of Communities and Valorization of Traditions	Structuring a Diversified Events Program	Signage and Information Facilitating Independent Enjoyment
	Proliferation of Cultural Animation	Surf: Information and Accessibility	Development of Good Practice Guidelines	Training and Awareness-raising Actions: Tourism Professionals and Residents	Ericeira in the Premium Segment
	Mafra, UNESCO Heritage	Enhancement of Positioning in Nature and Outdoor Segments	Qualifying and Diversifying the Upscale Sun and Sea Tourist Offer	MICE	Tangible and Intangible Heritage
	Enhancing the Offer Through Investment Attraction	Competitive Reinforcement			
Axis 2 Infrastructure: Increase and Improvement of Support Resources	Creation of a Transport Service Across the Entire MM	Adoption of Universal Design (Accessible Tourism)	Creation of Mountain Biking and Hiking Trails	Flexible Mobility Resources	Road Access and Parking
Axis 3 Natural and Cultural Resources: Utilization and Valorization of Heritage	Viewpoints	Inventory of Tourist Resources	Revitalization of Handicrafts	Technology Allied with Heritage	
Axis 4 Development of New Products	Accessible Tourism	Event Tourism			
Axis 5 Governance and Synergies: Promoting Articulation Among Offer Agents	Proximity Between DMO and Stakeholders	Regular Sessions for Gathering Input from Tourism Players	Establishment of an Advisory Council for Tourism Innovation and Development	Collaboration Protocol between CMM and Higher Education Institutions	Dissemination of the Annual Tourism Bulletin
Axis 6 Development of Sustainability Measures and Smart Destinations	Preservation of Cultural and Natural Heritage	Sustainable Economic Development	Social and Cultural Responsibility	Environmental Management and Energy Efficiency	Smart Destinations Measures
Axis 7 Communication and Marketing	Promotion of Tourist Offer at Events	Creation of a Specific Online Page for MM Tourism	Boosting the "Mafra & Ericeira Experience" App	Social Media: Pages for MM Tourism	Promotional Video of Mafra Destination
	Marketing Plan for Mafra Tourism	Participation in Tourism Fairs			

Table 2 - Strategic Axis for Tourism Destination Development

Axis 1 - In MM, revitalizing the Local Accommodation (AL) sector is imperative due to the scarcity of certified ventures. Incentives are proposed to spur the development of new 4 and 5-star accommodations, especially in coastal and rural areas. Collaboration with educational institutions can aid in monitoring tourism quality. Diversifying activities beyond coastal regions, involving tourism animation agents and local authorities, is crucial for local development. Initiatives like cultural animation proliferation, real-time surf info platforms, and tailored surfing for all abilities are recommended. Training for tourism professionals and a community awareness program are vital. Positioning Ericeira as a premier surfing destination and leveraging Mafra's UNESCO heritage status are crucial. Strengthening MM's nature and outdoor tourism, diversifying upscale sun and sea tourism, and integrating MM into the MICE circuit are key. Promoting and enhancing tourist products supported by MM's heritage are vital. Additionally, incentivizing investments in accommodations, especially in city breaks and emerging markets like MICE and nature tourism, and enhancing

competitiveness in the restaurant sector by attracting captivating projects promoting traditional gastronomy are essential strategies for boosting tourism in MM.

Axis 2 - MM aims to enhance its tourism infrastructure and accessibility to attract visitors year-round. Initiatives include expanding transportation services like the "Beach Bus" from Ericeira to rural areas, promoting universal design for inclusivity, creating mountain biking and hiking trails, and offering shared bicycles for sustainable mobility. Improving road access and parking, especially in high-demand areas like Ericeira, is crucial for visitor convenience. These efforts align with MM's goal of becoming a more accessible and appealing destination, fostering economic growth and enriching visitor experiences.

Axis 3 - Efforts are directed towards enhancing the tourist experience through various strategies. This includes revitalizing and creating scenic viewpoints for landscape appreciation, developing a comprehensive touristic resource inventory with stakeholder input, establishing a Municipal Artisanal Center to promote local craftsmanship, and leveraging technology to enrich heritage exploration through multimedia and online services. These initiatives aim to elevate MM's tourism appeal by providing engaging experiences, fostering stakeholder involvement, and ensuring accessibility and preservation of cultural heritage.

Axis 4 - To ensure accessibility in tourism, MM must adopt a comprehensive approach involving various stakeholders. Encouraging tour operators to offer support for adapted surfing and providing bicycles for individuals with disabilities are crucial steps. Creating events focused on accessibility further promotes inclusivity. In terms of event tourism, MM stands to benefit significantly from investing in segments like technology, accessibility, and LGBTQI+. These events diversify the tourism offering, stimulate the local economy, and promote innovation and inclusivity. By strategically investing in event tourism, MM can strengthen its reputation, attract diverse visitors, and contribute to sustainable tourism growth.

Axis 5 - To boost tourism in MM, effective communication between the DMO and stakeholders is vital. Regular consultations and partnership building foster synergy and informed decision-making. An advisory council with academia, local institutions, and tourism sectors can drive innovation and inclusivity. Collaboration protocols with higher education institutions can harness intellectual resources for research and development. Publishing an annual tourism bulletin summarizing sector activities aids policymaking and sustainable planning, offering valuable insights for investment decisions.

Axis 6 - To ensure sustainable tourism development in Mafra, key actions include preserving cultural and natural heritage through conservation efforts and community involvement, fostering economic growth via support for local businesses and sustainable entrepreneurship, promoting social and cultural responsibility through inclusivity and community engagement, implementing environmental management practices for minimizing ecological impact, and adopting smart destination measures leveraging technology for enhanced visitor experiences and sustainability. These initiatives collectively aim to balance tourism growth with resource preservation and community well-being.

Axis 7 - To bolster tourism in Mafra, proposed strategies include leveraging events for promotion, establishing a dedicated online tourism portal, enhancing the "Mafra & Ericeira Experience" app, utilizing social media, producing targeted promotional videos, developing a strategic marketing plan, and participating in tourism fairs, all aimed at amplifying destination visibility, engagement, and visitor experiences.

5. CONCLUSION

In conclusion, this study delved into the strategic planning aspects pertinent to the tourism system of MM, aiming to evaluate its growth potential, identify deficiencies in the offering, and

outline strategies for sustainable development. Through an examination of the tourism landscape, regionally, it became apparent that tourism holds significant economic importance, particularly in regions like MM, characterized by rich cultural and natural heritage.

Strategic planning emerged as a crucial tool for steering the tourism sector towards sustainable growth and competitiveness. By conducting thorough analyses and engaging stakeholders, it was possible to lay down a framework for strategic development. The evaluation of destination competitiveness, coupled with theoretical-conceptual approaches, underscored the importance of holistic planning in fostering tourism development.

The study also highlighted the necessity for comprehensive planning instruments, such as the MM Tourism Development Strategic Plan, to guide municipal management and ensure balanced tourism development. This strategic plan, developed through collaborative efforts involving various stakeholders, including local authorities, educational institutions, private sector entities, and the community, is poised to provide a roadmap for enhancing tourism activities in MM.

Moreover, the findings from questionnaires and primary data collection underscored the resilience of MM in overcoming its exponential tourism dependence on surfing. However, concerted efforts are required to diversify tourism products and improve the overall quality of services offered, particularly in areas outside the main tourism hubs of Mafra and Ericeira.

In light of these conclusions, it is imperative to emphasize the importance of ongoing monitoring and adaptation of strategies outlined in the MM Tourism Development Strategic Plan. By remaining flexible and responsive to changing market dynamics and stakeholder needs, MM can position itself as a leading tourist destination, offering unique experiences while preserving its cultural and environmental heritage.

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