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Post-COVID-19 tourism: perspectives for sustainable tourism in Brazil, USA and Spain

Turismo pós-COVID-19: perspectivas para o turismo sustentável no Brasil, Estados Unidos e Espanha

Turismo post COVID-19: perspectivas para el turismo sostenible en Brasil, Estados Unidos y España

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Resumo: Este estudo investigou os impactos na indústria do turismo devido à pandemia de coronavírus. A demanda turística durante a pandemia foi comparada no Brasil, Espanha e Estados Unidos. As implicações da pandemia e as mudanças na demanda por sustentabilidade no turismo são discutidas. Os resultados indicam que, embora o setor tenha parado quase inteiramente, há uma oportunidade para o renascimento de um turismo mais sustentável.

Palavras-chave: Sustentabilidade. Turismo. Internacional. Crise. Recuperação.

Abstract: This study investigated the impacts of the coronavirus on the tourism industry. Tourism demand during the pandemic was compared in Brazil, Spain and the USA. Implications of the pandemic and the changes on the demand for sustainability in tourism are discussed. Results indicate that although the industry did stop almost entirely, there are opportunities for the revival of a more sustainable tourism.

Keywords: Sustainability. Tourism. International. Crisis. Recovering.

Resumen: Este estudio investigó los impactos en la industria del turismo debido a la pandemia del coronavirus. La demanda turística durante la pandemia fue comparada en Brasil, España y Estados Unidos. Se discuten las implicaciones de la pandemia y los cambios en la demanda por sostenibilidad en el turismo. Los resultados indican que, aún que la industria se detuvo casi por completo, todavía existe la oportunidad de un renacimiento turístico más sostenible.

Palabras Clave: Sostenibilidad. Turismo. Internacional. Crisis. Recuperación.

1 Introduction

The arrival of the COVID-19 pandemic all over the world during the first semester of 2020, which has become a global economic and social crisis, has had a deep impact on the tourism sector. The crisis is comprehensive and has developed suddenly and unexpectedly, therefore making it quite difficult to make forecasts that are slightly realistic (ROMAGOSA, 2020). However, there is a consensus that the changes will be profound and permanent. In addition, socio-economic changes are likely to have a very significant impact on tourism. Based on the data observed, and the recent trends in the tourism

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sector so far, this study aims at analyzing possible implications this crisis may have for the sector's sustainability and the challenges it faces.

The travel industry is one of the most affected sectors by the crisis, as the policy of isolation resulting from contention measures for contagion by COVID-19 directly affects the economic dynamics of the sector, leaving almost no possibility of revenue. According to calculations made by the United Nations World Tourism Organization (UNWTO), international tourist arrivals dropped between 58% and 78% in 2020, if compared to the previous year (UNWTO, 2020a). Furthermore, these numbers will be accompanied by a deep global economic recession. However, it is also necessary to consider that the economic dependence of nations, regions and localities in relation to tourism is varied.

Even in a scenario of uncertainties, the return to economic activities is a fact. Labor relations and leisure activities are also happening with the necessary adaptations. Also, the necessity for leisure persists even in uncertain conditions and futures. When we adapt to changing realities and the "new normal," alternative ways of recreating and traveling are found. As such, planning and coordinated actions for recovering tourism are fundamental. Nevertheless, many voices — especially coming from the academic world — have recently claimed that the "return to normal" should not be a priority. Instead, this crisis should be an opportunity to promote a more sustainable tourism and address the challenges that the sector already had before the crisis (i.e. climate change, overtourism, etc.) and introduce relevant transformations (BROUDER, 2020; FLETCHER *et al.*, 2020; IOANNIDES; GYIMÓTHY, 2020; NEPAL, 2020; PRIDEAUX *et al.*, 2020; ROMAGOSA, 2020).

In this paper we aimed to find and analyze public policies and strategies for recovering tourism with an emphasis on sustainability. The authors verified measures taken to support the tourism industry in the post pandemic period, considering the new reality imposed by the health crisis. The survey was conducted in three of the most affected countries by the coronavirus (Brazil, USA and Spain). By July 2020, these countries, together, registered almost seven million people infected⁴ (WHO, 2020). In this health emergency scenario, different impacts and subsequent consequences for the economy are expected. The three countries all share a high contribution of tourism to countries' GDP's, and planning strategies and affirmative actions for resuming tourism can contribute to a faster and more sustainable recovery of losses generated in the first half of 2020.

2 Methodology

⁴ 2.4 million cases in Brazil, with 87 thousand deaths, 280 thousand cases in Spain, with 28 thousand deaths and in the USA, with 4.2 million cases and 147 thousand deaths (30/07/2020).

Leandro Fontoura Carolin Lusby Francesc Romagosa

POST-COVID-19 TOURISM: PERSPECTIVES FOR SUSTAINABLE TOURISM IN BRAZIL, USA AND SPAIN

This research is descriptive and exploratory in nature. By means of qualitative research methodologies, the researchers used personal communication, secondary data analysis and one-on-one interviews with experts (VERGARA, 1997; FLICK, 2009), in response to the need for investigations on this theme. Due to social distancing and lockdown measures, no field research was carried out. The researchers relied instead on using online resources and phone consultations as main methods of collecting data.

The survey was carried out on three continents: South America, North America and Europe with general information from countries with a large number of annual tourists or with an important participation of tourism in the GDP. Brazil, the USA and Spain have arguably been some of the countries that were most seriously hit by COVID-19 infections, therefore, investigations into tourism potentials in these countries are particularly interesting.

As mentioned before, secondary data were collected directly from official sources of national or local governments. The information that was presented in this study refers to the period ending in July 2020. Due to changes in the scenarios of the pandemic, some actions and strategies may be changed, and other policies or measures might be added during the planning of the resumption of tourism post COVID-19.

3 Brazil

3.1 Impact of COVID-19 on the Brazilian tourism industry

Brazilian tourism has been practically inactive since mid-March 2020 and has spent the entire first semester without experiencing a significant recovery, even though the economy showed the first signs of opening business in June 2020. With no prospect of an active resumption of economic activities in the first half of 2020, tourism should experience lines of productivity resumption (return to growth) with variations between its various segments. In many cases, even with the availability of assistance from the tourist service, it is estimated that consumers will still be skeptical about the possibility of traveling and, consequently, moving the sector's economic chain (FGV, 2020).

Even when we take into consideration isolated cases of commercial reopening in some cities, the economic status of the tourism sector is still practically paralyzed. From an economic point of view, the interruption of the tourism production chain impacts the generation of jobs in sectors that are not only in the travel industry, but that depend on it to maintain their activities (FGV, 2020).

18

Tourism activities generated near 2.6 million jobs in 2018 and many positions were lost and are still threatened by the pandemic. The projection of losses and economic recovery of tourism in Brazil, elaborated by *Fundação Getúlio Vargas* (FGV), based on real data updated in June 2020, shows that the economic losses of tourism were severely impacted starting in March 2020, reaching almost 90% of revenue losses (FGV, 2020).

Therefore, solutions only from private sectors cannot be demanded and partnerships are necessary. In Brazil, the public sector will have a fundamental role in supporting the recovering of activities, whether through regulations, by making credit feasible and canceling fees or by the establishment of contingency plans. This means that specific measures for tourism need to be implemented immediately, in order to avoid the collapse of activities (FGV, 2020).

3.2 Post COVID-19 sustainable tourism in Brazil

The main forecasts for the recovering of tourism in a post-pandemic scenario show that due to the new habits of tourists, the most sought-after destinations will be those with less possibilities of agglomeration and that can be reached by car within a radius of up to 300 km. However, for an adequate absorption of this repressed demand to occur, it is necessary to plan and organize enterprises and destinations, not only in relation to local health measures under the responsibility of the private sector, but with the insertion of adequate public policies, investments in access infrastructure, and coordinated actions that allow tourism to take place in an organized and sustainable manner, in order to benefit tourists with moments of relaxation, contact with nature, and assist entrepreneurs with economic strengthening and local development.

Research has shown, however, that the virus has caused an effect of almost total paralysis in the actions and planning of public agencies and institutions. The impact of an unprecedented crisis on tourism is understandable, but after more than four months since the beginning of the pandemic and the almost total closure of tourist activities, practically no Brazilian state has a public plan with consistent and realistic ideas and initiatives for the resumption of activities and survival of tourism.

In Brazil, the tourism ministry has only three initiatives distributed among the categories analyzed in this research, being two in the "Actions, Movements and Stamps" category with a campaign to encourage the rescheduling and not the cancellation of trips; one in the "Financial resources" category, with the release of R\$ 5 billion (U\$ 960 million) for business in the sector; and one initiative in the category of "Sanitary measures", with the creation of a stamp to be given to the enterprises that follow the recommendations of the Ministry of Tourism to prevent the spread of coronavirus. In the same vein

are the Brazilian states, where the tourism secretariats report few initiatives and strategies for confronting and recovering tourism. In Rio de Janeiro, São Paulo and Minas Gerais, three of the most important states for national tourism, there are only four initiatives, one for Rio de Janeiro in the category "Actions, Movements and Stamps" and one for Minas Gerais in the category "Financial resources". The state of São Paulo has an initiative in both categories (see Table 1).

Table 1. Strategies for tourism recovery after COVID-19 in Brazil

Governments	Actions / Movements /	Financial resources	Sanitary measures
	Stamps		•
Ministry of Tourism	Creation of the movement "Do not	R\$ 5 billion for general fund to tourism	Creation of the "Responsible Tourism -
	cancel, reschedule"		Clean and Safe" stamp
Rio de Janeiro	Creation of "Rio de		-
Government	Janeiro Conscious		
	Tourism" stamp		
Minas Gerais		Financing conditions	
Government		facilitated by the	
		Development Bank of	
		Minas Gerais (BDMG)	
		for micro and small	
		tourism companies in	
		Minas Gerais.	
São Paulo Government	Partnership between the	R\$ 12 million for	
	SP Government and	improvement works	
	Airbnb to leverage the		
	tourism post-pandemic	5	
Santa Catarina	Improvements in Serra	Request for	New Guidelines for
Government	do Rio Rastro to	decentralization of	visitation and Tourism
	strengthen local tourism	resources to be used in	
Dalia Caramana		the Viaje + SC Program Credit line of R\$ 32	
Bahia Government		· ·	
		million for business	
		people and professionals in the tourism sector.	
Rio Grande do Sul		Badesul has an exclusive	
Government		credit fund for	
Government		companies in the	
		productive chain of Rio	
		Grande do Sul tourism	
		(financeable value of up	
		to R\$ 30 million, with a	
		grace period of 12 to 60	
		months)	
Paraná Government	Support and	Companies in the	
	encouragement from the	tourism and events sector	
	state government for the	can access the R\$ 1	
	campaign "Don't cancel,	billion credit available	
	Reschedule!"; Tourism	through credit lines from	
	sector resumption plan	the Regional	
		Development Bank of	
		the Extreme South	

		(BRDE) and Fomento Paraná.	
Amazonia Government	Plan for Resumption of Tourism Activity - Amazone-se		

Source: Official sites of Ministry of Tourism and Tourism States Secretariat (2020)

States on Southern Brazil, Paraná, Santa Catarina and Rio Grande do Sul showed better results regarding recovery plans. Despite not being organized by a public tourism management institution, it was possible to find some initiatives, even incipient, related to the decentralization of activities, work plans and regional strategic plans. It was also possible to identify other actions on recovering tourism in the last two weeks of July. São Paulo State announced a U\$ 250,000 partnership with the Inter-American Development Bank for the development of projects for the sustainable recovery of São Paulo tourism.

The ministry of Tourism also created the "Innovation in Tourism Contest" to seek sustainable and innovative solutions for the resumption of the sector and for the construction of the future of tourism in Brazil. Examples of Government initiatives that helped the tourism sector were actions taken to help keep business open and in turn keep jobs. This was done through an emergency financial aid of R\$ 600 (U\$ 115) per month for informal and self-employed workers and a financial credit line for paying salaries, especially for medium and small companies (BRASIL MTUR, 2020).

4 United States

4.1 Impact of COVID-19 on the US tourism industry

In the United States the tourism demand can be measured through direct and indirect means, including hotel taxes, airport and seaport arrival statistics, or through TSA (Transportation Security Administration) screenings at airports. According to the US Travel Association, the impact of COVID-19 on tourism has been worse than the Great Depression and September 11th, which were arguably devastating events for the American tourism industry. The association stated that in the year post September 11th, travel spending declined by 57 billion. It is estimated that the travel industry will report losses of 519 billion this year (US TRAVEL ASSOCIATION, 2020). The impact is nine times worse than after the Great Depression. Tourism related job losses are proportionally significantly high with 38% of all job losses as a result of the pandemic. These losses in travel spending lead to indirect losses of tourism income through taxes, totaling over 80 billion in state and federal tax receipts by the end of 2020. The week including July 4th weekend (a national holiday in the Unites States) showed a 75%

decrease in TSA screenings at US airports on a year-over-year basis. Looking at booking statistics, it is possible to notice that international bookings to the US are 79% lower than in previous years (US TRAVEL ASSOCIATION, 2020). In Florida, hotel demand came to an abrupt halt, leveling off at -75% year over year demand from March through May. The months of June and July of 2020 saw an increase in hotel bookings, with an estimated decline in hotel bookings of 50% when compared to the same weeks one year ago. These changes in booking patterns equaled losses of -365 million in April and -180 million in June (US TRAVEL ASSOCIATION, 2020).

Previous research has shown travelers differ in their risk aversiveness. Lepp and Gibson (2003) found that younger and allocentric travelers are more likely to travel in times of perceived or actual risk, while mass tourists are more risk averse. Women and older travelers were found to be more cautious with their decisions to travel when health and safety risks were present. Furthermore, a type of tourist — known as "psychocentric" (PLOG, 1974) — show a decrease in travel consumption behavior to destinations in times of perceived increased risk.

In general, travelers require up to date information to make their travel decisions. For the State of Florida, this was measured by visits to the *Visit Florida site* (the state DMV website). This website hosts a safety information link, which all through 2019 had hardly any visits (way under 1,000 clicks). For the year 2020, the site registered over 45000 visits by mid-July (VISIT FLORIDA, 2020). This shows that travelers are searching for travel options but want up to date information on current safety measures. Geographical differences in willingness to take trips during the time of COVID-19 also exist, with 75% of residents in the Northeast planning to halt all travel, compared to only 59% of residents in the South and 57% of residents in the Midwest. The majority of American travelers (60%) agreed that having to wearing a mask in public would not keep them away from visiting a destination they want to visit. Instead travelers commented that they would prefer to visit a destination that has a mask mandate (US TRAVEL ASSOCIATION, 2020).

In the US, the demand for travel is still depressed and changes in travel behaviors are noted. This shows for example in a stark increase in the drive market, since people prefer visiting destinations that are drivable and closer to home. This means that natural attractions, national parks and smaller communities have all become more popular among tourists. Longer term vacation rentals have also become more prominent due to the increase in remote work possibilities.

4.2 Post COVID-19 sustainable tourism in the US

In terms of tourism sustainability, the outlook post COVID-19 in the US is uncertain. While internationally sustainability seems to be more important to ensure a balance of nature and also limit numbers of visitors, the US shows few concrete measures of increasing sustainability. Nonetheless, a substantial awareness of the importance of resilient destinations in times of crisis might spark increased measures and research in sustainability. Coincidently, travelers who are more likely to travel earlier (i.e. younger generations) are also more conscious and aware of sustainability. These travelers want experiences that are economically fair, that connect them to local people and culture and protect natural and cultural resources. Furthermore, an increased interest in natural resources and smaller communities, as well as local markets, does enhance economic and natural dimensions of sustainability. It could be argued that a tourism provider that is taking into account sustainable management practices is more resilient to threats, as it has measures in place to minimize resource dependency, like working with local economies in their supply chain, and hiring more locally. Measures of limiting access to natural resources to provide social distancing could also be helpful to simultaneously increase resource protection.

Looking at the balance of payments between countries, the US, which was the number one export earner from tourism expenses, could at least make up some of the losses through increased domestic tourism. Indeed, these are the thoughts of a potential travel tax credit to be debated by congress, which aims at stimulating domestic travel through the tax credit. This too indirectly links to increased tourism sustainability post COVID-19, as the emphasis shifts to more local travel consumption. Furthermore, an increased demand for private, small scale tourism products and experiences also indirectly enhances sustainability and favors sustainably conscious travel providers, such as ecotourism enterprises. Lastly, the substantial mental and emotional stress as a result of the pandemic and an uncertain future leads to higher demands for retreats like trips focusing on wellbeing, digital detox and connection to nature and oneself. This trend too seems to favor sustainability with a focus on authentic products, inner connection, natural attractions and smaller lodgings and groups.

5 Spain

5.1 Impact of COVID-19 on the Spanish tourism industry

The travel and tourism industry in Spain are very important. According to the WTTC, their contribution to GDP in 2019 was 14.3% of the total economy. Simultaneously, both were responsible for 14.6% of total employment of the country. Spain is one of the first tourism destinations in Europe

and in the world. The COVID-19 outbreak has been the biggest crisis of the history of tourism in Spain. For example, the arrival of international tourists in April 2020 was non-existent (7.2 million was the number for the same month in the previous year), and the same happened for tourism expenditure (NEXOTUR, 2020). Activities related to accommodation and the catering sector, travel agencies and transport companies, literally disappeared from mid-April until mid-June. This was due to the border restrictions, but also to the country lockdown, a recurrent situation in most of the European countries. The Secretary of State for Tourism, in coordination with the Ministry of Health, prepared the specification guides for the reduction of contagion by the SARS-COV-2 coronavirus. The guides contain service, cleaning and disinfection, maintenance and risk management specifications for the different subsectors of tourism. Having this prepared and with a certain control of the pandemic, tourism activity restarted partially and gradually (the so-called de-escalation) in some sectors from May to June 2020. International borders started to reopen again in all the European Union, but new outbreaks did not allow to return to the previous situation. New restrictions announced by some European countries for their citizens to visit Spain in July 2020 even aggravated more the situation, and tourism in summer should be domestic in its majority (PLANAS BOU, 2020). Crisis in the sector, with a heavy unemployment rate, will be unprecedented.

5.2 Post COVID-19 sustainable tourism in Spain

In order to face the crisis, the Spanish government approved an aid package that revolves around four main guidelines: easing the conditions of the temporary collective layoffs (known as ERTEs in Spain); supporting workers and businesses affected by the slump in activities; guaranteeing liquidity for businesses; and supporting researchers to find a coronavirus vaccine. The aid package includes a liquidity injection of &14 billion to boost economy, &3.8 billion to reinforce public health, &400 million for most affected sectors, tourism and transport, with amounts of &18.2 billion (1.5% of Spain GDP) from the Shock Plan. It also facilitates access to finance and payment of credits for companies, protecting the most vulnerable groups. Measures to support the extension period of activity of workers with discontinuous permanent contracts in the tourism and hospitality sectors were also applied. The Spanish government also announced a specific EUR 4.25 billion plan to aid tourism industry. The bulk of the aid package is comprised of EUR 2.5 billion in loans through the state-owned bank *Instituto de Crédito Español* (ICO) for tourism businesses. In other words, 60% is aimed at facilitating funding, and will not take the shape of direct grants. Direct investment represents around EUR 300 million, or 7% of the plan. Another EUR 850 million is earmarked for sustainability and digitization projects (UNWTO, 2020).

The Institute for Spanish Tourist Quality (ICTE), made up of the National Employers of the tourism sector and different governmental institutions and approved the creation of an ICTE seal, the Safe Tourism Certified — a transversal tourism seal, covering 21 subsectors — and to which companies, organizations and tourism resources may voluntarily choose, as a guarantee mark and certification for the implementation of the Risk Prevention System for the Health versus COVID-19, a mark that would be reached after having passed an audit carried out by independent companies.

Specifically related to sustainability, apart from the previously mentioned funding, a specific program called "Tourism sustainability plans for Destinations" (Planes de Sostenibilidad Turística en Destinos) was approved in June 2020. It aims to help tourism destination managers to overcome the fall of demand, helping them to renew and regenerate consolidated destinations, as well as promoting and dynamizing rural destinations. The main objective is to boost destinations' competitivity, speeding its transformation towards a new model based on sustainability and digitalization, not forgetting diversification of offer and demand. Tourism in Spain has been, during many decades, heavily concentrated in few areas, especially along the Mediterranean coast and islands (the Balearic and the Canary Islands) and in some specific cities for their cultural and urban appeal (e.g. Madrid, Barcelona, Sevilla, Valencia, Toledo, Salamanca, etc.). In this regard, the COVID-19 crisis can be a very good opportunity to try to take out pressure from those massified destinations — in some cases they suffered from overtourism problems in the pre-crisis period — and redistribute the demand across the country. This process could be also boosted not only by those governmental policies but for the emerging demand, looking for less massified destinations and places that offer more environmental quality and safer places to visit. This type of destinations, which should benefit from this new trend, are rural and natural areas. These ideas are supported by a recent study made by Escapada Rural (2020), which surveyed more than 10,000 potential Spanish tourists. 93% of respondents said that they would travel again after confinement; 51% of respondents had the intention of travelling outside Spain, but with the crisis they decided to change their plans and, if possible, they said they would do domestic tourism; and finally, 70% of respondents affirmed that if they could travel eventually, they would choose a rural destination. Obviously, this is not necessarily going to correspond with reality, but interestingly it shows a new trend in the Spanish market, that points to a growing interest in the proximity / domestic destinations and, more specifically, rural destinations instead of consolidated urban or coastal destinations. If this trend is confirmed, we could affirm that tourism in Spain would be following a direction that could be catalogued as "more sustainable" than the previous stage. However, this would be not enough to promote a whole sustainability for the tourism and travel sectors and more actions to save those sectors would still be needed.

6 Conclusions

If the analyses carried out are confirmed as trends indicate, destinations with local or regional attractiveness should stand out with an increase in visitation, especially those located within a driving distance from big cities. In all analyses, local tourism was highlighted as the most likely travel scenario in recovering for the Sars-Cov-2 outbreak, and ecotourism, rural tourism and other sustainable destinations are founded in this local context, which involves natural areas, local communities and activities in open space.

Sustainable destinations with these characteristics are abundant in the three countries that we have analyzed (Brazil, USA and Spain) and could bring two-way benefits, both for tourists and to foster local development. Also, it is expected that in an economic crisis and in a layoff environment people will spend less money in travels and vacation, bringing them to a local tourism.

Results showed the opportunity to strengthen sustainable destinations and the importance of preparing and planning. In the US and in Brazil, plans for tourism sustainability are not being developed yet. Spain is one step ahead on the outbreak and on sustainable tourism planning, with at least one broad study regarding rural tourism post Covid-19.

The Ministry of Tourism in Brazil already recognizes the need for a recovery plan focused on strengthening domestic and regionalized tourism (BRASIL MTUR, 2020). In this scenario of fostering domestic tourism, sustainable development, solidary economy and smart destinations stand out. Planning and action strategies, strengthening tourism research and improving the tourist experience are urgent and fundamental, as a disorganized tourism trade and inefficient communication will only contribute to a longer and more difficult recovery of tourism.

The question of resiliency through crisis has also become central to the industry. The faster and more adequately destinations are analyzed and understood, the faster modifications can be made in travel demand. As travelers are more interested in socially distanced nature-based tourism, away from the mass tourism model, shifts to sustainability are becoming more doable.

In any case, the effects of the pandemic on the tourism sector are unquestionable, but as analyzed, they will be perceived in different ways by nations, regions and places. In addition, their recovery and overcoming will depend on their performance, and may be slow and gradual or more consistent, perennial and sustainable. All of this will depend on the planning of this recovery on national, regional and local levels and must consider appropriate strategies and their different scales. In this new context, sustainability is seen as a necessity, clearly linked with competitivity.

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