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**Leveraging the 2030 FIFA World Cup: Strategic Pathways for Turismo de Portugal to
Strengthen the National Destination Brand**

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**How can insights into travel behaviours and motivations support Turismo de Portugal
in developing effective marketing strategies for the FIFA World Cup 2030?**

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Abstract

This thesis is part of a larger study that explores how Turismo de Portugal can leverage its co-hosting role in the 2030 FIFA World Cup to strengthen Portugal's destination branding through two key pathways: Tourist Profiling and Legacy. This paper specifically examines Tourist Profiling. Drawing on existing literature, diagnostic frameworks and primary data, the study focuses on the three stages of the mega-event (pre, during and post), providing a holistic perspective on strategic opportunities. The findings support a set of recommendations aimed at improving Portugal's pre-event attractiveness and competitiveness, while consolidating long-term legacy for the national brand. Overall, this research provides actionable insights that intends to guide Turismo de Portugal's decision-making process.

Keywords

Sports Management, Destination Branding, Sports Tourism, Mega-events, FIFA World Cup 2030, Portugal, Tourist Profiling, Market Segmentation, Bundling, Legacy, Resonance.

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1. Introduction

Tourism is one of the most important sectors of the Portuguese economy, significantly contributing to employment, investment, and fiscal revenue throughout the last decades. In 2024, the sector accounted for 11.9% of the country's total GDP revenue (Instituto Nacional de Estatística 2025), ascertaining its pivotal strategic importance for national development and policy planning. Considering the increasingly competitive global tourism landscape, destinations must construct their offer and image so that it occupies a distinctive and meaningful place in the minds of traveller's (Cf. Kotler and Keller 2016; Pike 2008), ultimately influencing their decision making and creating long-lasting emotional connections.

In the current crowded market, sports tourism has been gaining attention as a driver of visibility and competitive advantage. In particular, sports mega-events are a key opportunity for host nations to amplify their global exposure, attract diverse audiences and promote a broad spectrum of cultural and experiential value proposition to visitors. From the Olympic Games to the FIFA World Cups, researchers have been studying and analysing these events to grasp how a destination can leverage short-term media attention to foster long-term tourism gains. The FIFA World Cup co-hosted by Portugal, Spain and Morocco in 2030 represents then a rare opportunity for host nations to strengthen its destination branding, attract new segments, bolster visitor engagement and reinforce its football heritage. Nevertheless, unlocking this potential depends on understanding audience perceptions, travel motivations and behavioural patterns. Additionally, destinations have to work on converting temporary global attention into enduring brand resonance and sustainable sports tourism legacy, a process that literature consistently identifies as complex, nonlinear, and dependent on structured planning.

Considering these dynamics alongside the upcoming FIFA World Cup, the purpose of this dissertation is to explore how Turismo de Portugal, the National Tourism Authority, integrated under the Ministry of Economy and Territorial Cohesion, can strategically use the FIFA World

Cup 2030 to strengthen Portugal's destination brand. Consequently, two research questions that reflect both the immediate and long-term strategic challenges faced by Turismo de Portugal were outlined. Firstly, this thesis seeks to identify and analyse behavioural and motivational patterns among domestic and international tourists, generating actionable insights to support targeted, evidence-driven marketing strategies ahead of the event. Secondly, this research work incorporates assessing how mega-events strengthen brand awareness and loyalty (core elements of customer-based brand equity) and how these may convert into long-term resonance and a sustainable legacy for the tourism sector. Collectively, the two research questions will culminate in the development of empirically supported recommendations for Turismo de Portugal, the project's institutional partner, to maximise the event's strategic value.

The following chapters will introduce the theoretical foundations for this study, comprising insights from the literature on destination branding, sports tourism, mega-events, profiling, bundling, resonance, and legacy. Furthermore, the methodological approach will be presented in detail, followed by a set of diagnostic analysis, including an historic contextualization of the Euro 2004 (also hosted by Portugal), a quantitative survey using the CBBETD model to assess Portugal's current customer-based brand equity among domestic and international audiences, as well as SWOT and PESTEL analysis to contextualise the country's positioning within the broader setting of the 2030 World Cup. Finally, the empirical findings will be discussed alongside strategic recommendations for Turismo de Portugal, indicating how the organization can leverage the event to strengthen Portugal's destination brand.

2. Literature Review

2.1. Destination Branding

In recent years, rising global GDP per capita and disposable incomes have been fuelling the growth of businesses and leisure travel worldwide, making destination differentiation more

critical than ever (Liu et al. 2025). To be considered as potential options, tourism destinations must first be included in the consumers' evoked sets, but as Qu et al. (2011) adds, that is not sufficient. For a destination to be selected, it must cultivate a unique identity in consumers' minds and effectively influence their intention to visit and revisit, thus reinforcing destination branding's strategic role in tourism development (Pike and Bianchi 2016).

According to Gómez et al. (2015), the existing literature on the topic can be divided into two main perspectives: the first concerns how destination branding is defined and whose viewpoint it adopts (marketer versus consumer), while the second focuses on how the brand operates and what it represents – whether it serves primarily to identify and differentiate the destination, or to embody visitors' experiences and its emotional bonds with it. Regarding definitions, building on Aaker's (1991) characterization of branding, Ritchie and Ritchie (1998) proposed what has become the most widely accepted definition of destination branding, as it captures both its functional and emotional roles, despite being developed from a marketer's perspective. It is then described as “[...] a name, symbol, logo, word mark or other graphic that both identifies and differentiates the destination; furthermore, it conveys the promise of a memorable travel experience that is uniquely associated with the destination; it also serves to consolidate and reinforce the recollection of pleasurable memories of the destination experience”. Blain et al. (2005) further enhance it by classifying those actions as “the set of marketing activities” aimed at building a consistent identity, while also incorporating specific consumer benefits into its scope, namely the reduction of search costs and perceived risk.

The process of measuring destination branding is complex, as we are dealing with an extremely dynamic ecosystem that counts with the intervention of a great number of stakeholders, diminishing product control and consequent development (Quintal et al. 2014; Gómez et al. 2015; Kashif et al. 2015).

2.2.Mega-Events

Müller (2015) presents one of the most influential definitions of mega-events: “Mega-events are ambulatory occasions of a fixed duration that attract a large number of visitors, have a large mediated reach, come with large costs and have large impacts on the built environment and the population.” (638). In general terms, mega-events are regarded as large-scale, internationally significant occurrences that attract vast audiences and capture intense media and political attention. These are distinguished for their symbolic value and rounded transformative potential, yielding tangible and intangible legacies for host destinations (Getz 2008; Horne 2007; Müller 2015; OECD 2017).

According to Jago et al. (2010) there are three main types of mega-events: sports, cultural, and business; existing literature focuses largely on the study of sports events, but overall, the field has evolved markedly over the decades. Early work mainly focused on economic impact assessments and marketing-oriented perspectives, often using input–output and cost–benefit models to justify public spending by projecting tourism gains, but academics such as Hall (1989) were starting to recognize the need for more comprehensive lines of research. Later, in the 2000s, critiques showed that these models frequently overemphasised benefits and ignored displacement and opportunity costs (Mills and Rosentraub 2013), prompting a shift towards more rigorous econometric analyses. Therefore, the field broadened to encompass socio-cultural impacts, media narratives, governance, destination branding and later sustainability and resilience (Getz and Page 2016; Wang and Jin 2019; Gao et al. 2025; Al-Thani et al. 2025).

In actuality, the correlation between mega-events and destination branding sits at the heart of this broader academic evolution, reflecting the multifaceted role of sports tourism across the event lifecycle. Chalip and Green (2003) were among the first to empirically prove that sport event media can shape a destination’s image and influence intention to visit. Their findings encouraged later scholars to explore the process through which event-related marketing,

publicity and symbolism transfer to the host location. Xing and Chalip (2006) developed on this through co-branding and match-up models, proposing that the extent and direction of image transfer “depend on the quality of fit between event and destination brands”.

Later in 2007, Kaplanidou and Vogt designed a structural model to examine how event image and destination images interact and influence sports tourists’ satisfaction and intention to revisit. The conclusion derived from this study was that perceptions of the event directly affect perceptions of the destination, whereas the reverse relationship is weaker. On the same lens, Kim, Kang and Kim (2014) demonstrated that mega-events can strengthen destination image, and that subsequently this improved image impacts visitors’ behavioural intentions. Together, these studies confirm that event-induced image change is a primary pathway through which mega-events shape travel behaviour. Furthermore, Knott, Fyall and Jones (2015) introduced the concept “nation-branding legacy”, demonstrating that the particular image benefits of the 2010 FIFA World Cup for South Africa were not only shaped by the event but also by the strategic coordination among government agencies, media and citizens. Building on mega-events legacy, Preuss (2007, 2015) worked on conceptualising this notion, proposing the legacy cube, a framework that helps identifying and classifying specific legacies from events.

Altogether, literature suggests that mega-events may enhance destination awareness and perceptions, but the magnitude and durability of these effects depends on the event, the destination, and the customer as well as the destination marketing organizations (Wang and Jin 2019). Additionally, positive outcomes are more likely when the destination already possesses a strong and congruent brand (Xing and Chalip 2006), when media narratives reinforce desired identity themes (Chalip, Green, and Hill 2003), and when legacies are strategically planned and managed beyond the event duration (OECD 2017). For instance, the Beijing 2008 Olympics greatly improved China’s visibility and modern image by raising awareness (Gibson,

Qi, and Zhang 2008), whereas Athens 2004 showed that without a sustained marketing follow-up effort, the benefits quickly dissipate (Mills and Rosentraub 2013).

As noted by Kim, Kang and Kim (2014), a more recent variable is the growing role of digital communication and user-generated content in shaping global narratives about events in real time. Most empirical frameworks still rely on traditional media analysis, but incorporating social media sentiment could help capture the immediate emotional dimensions of event-induced image change. Lastly, researchers are also advocating for a shift: analysing event portfolios instead of single events; studying a coordinated sequence of large and small events that collectively build and sustain a destination's brand over time (Getz and Page 2016).

Despite the progress in the field, mega-events research still presents several limitations. Causal evidence for long-term brand effects remains scarce, as most studies rely on cross-sectional data or short time frames, and there is a limited understanding of negative unintended effects, such as cost overruns, social displacement, or environmental degradation, which can erode brand equity (Müller 2017). In fact, research on governance and resilience is particularly central given their growing salience as hosting cities struggle with public scepticism and pressure for transparent management (Gao et al. 2025).

To conclude, mega-events are portrayed as both opportunities and challenges for host destinations. Despite granting intense global visibility, they also expose the host to scrutiny and numerous risks. Therefore, coherent branding strategies, authentic local narratives and inclusive governance, are key to lasting reputational benefits. Nonetheless, without careful legacy planning and stakeholder engagement, their impacts may be fleeting or even detrimental. The ultimate challenge lies on both researchers and practitioners moving towards a more nuanced understanding of how mega-events intersect with urban governance, social equity, sustainable brand development and legacy.

2.3.The CBBE Model in Tourism

Brand equity plays a pivotal role in marketing, reflecting the growing recognition of brands as a company's most valuable assets (Gutiérrez et al. 2024; Light 1990) and the need of developing sustainable competitive advantages based upon non-price competition (Aaker 1991). Despite multiple perspectives, there is general consensus that brand equity reflects the "added value" conferred on a product or service through previous marketing investments in the brand (Tuominen 1999). Through its different definitions, brand equity has been regarded as a managerial concept, a financial intangible asset, a relationship concept or a customer-based one. Overall, the literature surrounding this topic has two major focuses: the financial aspects of brand equity (important to calculate a brand's valuation), and the consumer behaviour effects specific to a particular brand (Pitta et al. 1995). This work will be focusing on the latter.

Among the various conceptualizations of brand equity, Aaker (1991) and Keller (1993, 2001) stand out as the two most influential contributors to its theoretical development. Aaker conceptualized brand equity as a set of brand assets and liabilities (such as brand awareness, perceived quality, brand associations, brand loyalty, and other proprietary brand assets, such as patents and trademarks) linked to a brand, its name and symbol that add to or subtract from the value provided by a product or service. The framework adopts a managerial perspective, focusing on how brand assets generate value and a competitive advantage to the firm. Building on this foundation, Keller (1993) proposed the Customer-Based Brand Equity (CBBE) model, shifting the emphasis toward the consumer's perceptions. He defines CBBE (and, therefore, brand equity) as "the differential effect of brand knowledge on consumer response to the marketing of the brand". Central to this framework is the concept of brand knowledge, defined as the mental node in consumers' memory linked to a network of brand associations, and comprised of two key components: brand awareness (which includes brand recall and recognition) and brand image (the favourability, strength, and uniqueness of the brand

associations in consumer memory) (Tuominen 1999). Furthermore, Keller (2001) introduced the CBBE Pyramid, which encompasses a sequence of four hierarchical steps and six blocks designed to build strong brands in the minds of consumers through brand identity (salience), brand meaning (performance and imagery), brand responses (judgements and feelings), and brand relationships (resonance). Although the term *CBBE* was first employed by the previous author, it has been used in an interchangeable manner to also denominate Aaker's (and others) contributions to the topic. Appendix 1 includes a comparative table of the two models.

Furthermore, since its introduction, the concept of CBBE and its measurement have appeared in the tourism and hospitality sector, despite its multi-dimensionality (Boo et al. 2009). For the past years, several CBBE models have been presented and applied to numerous destinations with the goal of finding the most suitable one (Konecnik and Gartner 2007; Boo et al. 2009; Pike 2009; Ruzzier 2010). Konecnik and Gartner's model (2007) was the first one to be developed and was mostly based on Aaker's and Keller's contributions, giving origin to the *Customer-Based Brand Equity for Tourism Destinations (CBBETD) model*, that was experimented on a Croatia-based brand equity study for Slovenia. Since then, it has been employed to several destinations, with some variations. For instance, Boo et al. (2009) tested a new model by applying it to two gambling destinations, Las Vegas and Atlantic City, while Pike et al. (2010) adopted a similar approach to explore Australia's brand equity as a long-haul tourism destination in an emerging market. More recent studies used other models to measure the CBBE of Kashmir valley, in India (Yousaf et al. 2017) or of Croatia (Cervova and Vavrova 2021), although they all derive from the first.

3. Methodology

This thesis adopts a mixed-methods research design, integrating both primary and secondary data sources to comprehensively explore the research objectives and provide strong and

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strategic recommendations for Turismo de Portugal. The initial section of the thesis corresponds to the Literature Review, where some key ground concepts are analysed through relevant academic work, including destination branding, sports tourism and mega-events. The theoretical foundation of one of the diagnostic models is then presented, along with a brief introduction of previous applications in the tourism sector.

The following section presents a brief diagnosis of Portugal's current state as a tourism destination brand. While not directly addressing the main research questions, the aim is to contextualize the study and provide a strategic assessment through a Critical Overview of the Euro 2004, and a SWOT and PESTEL analyses, specifically within the context of the FIFA World Cup 2030, ultimately enabling a more holistic and informed decision-making process. Portugal's CBBE was also measured to understand the country's current brand-equity, while also supplying primary data that informs and supports the development of these two frameworks, complemented by secondary data drawn from academic articles and reports. To determine the country's brand equity, the research methodology employed was based on the CBBETD model introduced by Konecnik and Gartner (2007) and further used and developed by authors, such as Yousaf et al. (2017) and Cervova and Vavrova (2021). In accordance with this model, the following four subdimensions were analysed, as described by Yousaf et al. (2017): **destination awareness**, the strength of the destination's presence in the tourists' minds; **destination image**, the tourist's mental representation of knowledge, feelings, and overall impressions about the destination; **destination quality**, relates to tourist's perceptions of the overall quality and development of the destination; and **destination loyalty**, the strength of the tourist's connection to the destination, including the intention to revisit or recommend it to others. The items evaluated in each subdimension were chosen based on the previous indicated models. The model employed by Pike et al. (2010) was used as inspiration for the

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loyalty subdimension, as it targets both previous visitors and non-visitors. Accordingly, the items were adapted to ensure that non-visitors could also provide valid responses.

Building on these models, the CBBETD model designed to assess the four subdimensions was composed of 17 items in total, with 3 dedicated to measure awareness, 6 image, 5 quality and 3 loyalty (Appendix 2). The items were displayed in the form of statements referring to the country in question (Portugal) and measured using a 5-point Linkert scale, with 1 indicating strong disagreement and 5 strong agreement with the statement. The CBBETD model was integrated in the overall survey (which will be further described below) as an independent section, accessible to all respondents, to gather the perspectives not only of previous visitors, but also of those who had never visited the country. The items were available in Portuguese and English to understand both domestic and international views, as well as their differences.

The subsequent chapters address the two topics identified as relevant for the development of Portugal's destination brand in the context of the FIFA World Cup 2030: Tourist Profiling and Legacy. Through the combination of the diagnosis, literature review and survey, each topic is analysed, discussed, and translated into strategic recommendations for Turismo de Portugal.

To support both areas of analysis, quantitative research was conducted through the development and distribution of a Qualtrics online survey. It adopts a descriptive approach, as it aims to describe the current perceptions, motivations and behaviours of both domestic and international tourists regarding Portugal as a tourism destination and as future co-host of the World Cup. The questionnaire follows a cross-sectional design, as data was collected at a single point in time from both groups. The total sample was constituted by 263 valid respondents. The survey was reviewed by a member of Turismo de Portugal and tested by three volunteers, two Portuguese and one international, to guarantee a seamless experience for both groups. It was then distributed through relevant social media platforms, including WhatsApp

international groups, Facebook travel groups and Expat Communities, as well as through academic and personal networks. There was an attempt of establishing contact with national and international organizations to request support in its distribution, but without success.

The questionnaire's structure included 4 different sections: (1) demographics, (2) questions regarding their last trip to Portugal, (3) destination brand equity assessment, and (4) questions related to the FIFA World Cup 2030. The purpose of each section is described on Appendix 3. A screening question was used to conduct the respondents to different parts of the survey according to their visitation history: respondents who have already been to Portugal (Previous Visitors [N=238]) would go to the 2nd section, while the others (Non-Visitors [N=25]) would go directly to the 3rd section. Most of the questions were retrieved and adapted from Turismo de Portugal's travel BI report, that consists in an analysis of ETC's (European Travel Commission) Monitoring Sentiment survey responses of European travellers who indicated Portugal as their next intended destination. The entirety of the survey was available in both Portuguese and English, with the language being attributed after stating the nationality. All non-Portuguese respondents, regardless of nationality, were directed to the English version.

4. Diagnosis

4.1. Euro 2004 Critical Overview

In June and July 2004 Portugal hosted the Euro 2004, one of the country's largest mega-sport events to date, attracting 1.165 million stadium spectators and nearly one billion TV viewers (Perna and Custódio 2011). The championship required major new infrastructure investments, notably the construction of seven stadiums and the rehabilitation of other three. Although the tournament was praised as an organisational success, post-event evaluations revealed fewer positive outcomes: stadium costs surged from an expected €140 million to €323 million (a 230% increase), creating long-term financial strain, while many of the football venues proved

oversized and underused (Durão 2011). Overall, the event generated notable short-term economic gains: €1.9 billion in national production, a 20% rise in June 2004 tourism, and €183.8 million in tourism impact (Borges and Vieira 2019). However, its long-term sustainability was frail, resulting in financial burdens and a limited lasting legacy. In essence, the Euro 2004 has laid much of the foundational infrastructure that will support Portugal in hosting the upcoming FIFA World Cup. Nonetheless, this study does not examine wider impacts such as tourism patterns and effects, brand image, resonance, or brand equity, as the event occurred more than twenty years ago and the validity of available data is limited. In turn, the Euro 2004 serves as a source of critical lessons on economic viability, long-term planning, and the need to balance short-term success with sustainable post-event outcomes.

4.2. Measuring CBBETD of Portugal as a Tourism Destination

The descriptive statistics and reliability analysis for the four dimensions of the CBBETD model are presented in Appendix 4, and for each item in Appendix 5. In general, the results indicated that all four dimensions were evaluated positively by respondents, with mean scores above the midpoint of the scale, and that the internal consistency of the scales was generally satisfactory for the purposes of this study. Destination awareness recorded the highest overall mean ($M = 4.24$, $SD = 0.74$; $\alpha = 0.799$, 2 items), followed closely by destination loyalty ($M = 4.22$, $SD = 0.64$; $\alpha = 0.618$, 3 items) and destination image ($M = 4.20$, $SD = 0.61$; $\alpha = 0.820$, 6 items). Despite positively evaluated, destination quality showed the lowest mean among the four dimensions ($M = 4.10$, $SD = 0.61$; $\alpha = 0.760$, 5 items). Therefore, in relative terms, respondents perceived Portugal most strongly in terms of awareness, followed by loyalty and image, whereas quality emerged as a comparatively weaker, though still favourable, dimension of the CBBETD. A more detailed analysis of each item is provided in Appendix 6.

In interpretive terms, the descriptive and reliability results indicate that Portugal enjoys relatively strong customer-based brand equity as a tourist destination, particularly in terms of

general awareness, loyalty intentions and the affective and symbolic components of its image. Respondents are especially positive about the country's popularity and attractiveness, its towns and cities, the friendliness of its people, and its cultural and historical appeal. Food-related experiences, atmosphere and accommodation also emerge as key quality strengths. At the same time, the comparatively lower means for items related to sports and recreational activities, entertainment, value for money and infrastructure highlight these as potential areas for strategic action and improvement. For policy makers and destination management organisations, these findings underline the importance of reinforcing existing strengths in urban, cultural and gastronomic attributes, while simultaneously addressing perceived gaps in sport and entertainment offerings and in the communication/delivery of value and infrastructural quality.

4.3. SWOT Analysis

Starting with Portugal's strengths, the country has been experiencing an increase in international relevance and popularity among tourist destinations (**S1**), having reached record numbers across all main indicators in 2024 (Turismo de Portugal 2025), consolidating its competitive position in the sector. The country is also well perceived in terms of its culture, hospitality and safety (**S2**), enjoying a moderate but steadily growing international and domestic force and reputation, with tourists positively rating its beauty, values, culture, tradition, lifestyle and sense of familiarity (ONSTRATEGY 205). Portugal's ranking as the 7th safest country in the world (Institute for Economics & Peace 2025) further underscores the international trust in its stability and security. Portugal's strong football heritage (**S3**) is also a key factor, given that substantial investment in infrastructure and player development has enabled significant global talent export (e.g. Cristiano Ronaldo) (Mendes-Neves et al. 2025), and consistently strong international performances. The country's highly diverse tourism offerings (**S4**) and compact geography (**S5**) allow visitors to combine multiple experiences within a single trip, while being able to travel swiftly between the two regions that are going

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to welcome the World Cup matches (Lisbon and Porto) and others. Portugal's affordability (**S6**) is also a standout, as it is classified as one of the most affordable Western European countries for tourists, especially when compared to Spain (Budget Your Trip n.d.). The past years' touristic boom has led the country to further develop its tourism infrastructures and hospitality services, as well its accessibility through the expansion of the number of available plane routes (Diário de Notícias 2025) (**S7**). Finally, in recent years, the country has been stage to a great number of large-scale events of the highest European and international relevance, such as Champions League Finals (Lisbon, 2014, 2020 and Porto, 2021), Eurovision Song Contest (Lisbon, 2018), Web Summit (Lisbon, since 2016), and World Youth Day (Lisbon, 2023), providing a clear message of credibility on the country's hosting and organization capacity (**S8**). Additionally, the country's well-received hosting of Euro 2004 serves also as useful, although time-bounded, reference for the upcoming event (Público 2005).

Shifting the focus to the weaknesses, both Lisbon and Porto are among the most overcrowded cities in Europe in terms of tourist numbers (Time Out 2024) (**W1**), leading to a diminished visitor experience and an increased pressure on infrastructures which, due to the country's size, are already of very limited capacity. For this reason, infrastructure strains (**W2**) are predicted to be registered considering the high influx of tourists that is expected and past events' experiences. It is also important to consider that the quality of Portugal's infrastructures suffered one of the weakest scores in the CBBETD model. Through the same source, it was discovered that the country is poorly perceived as a sports and entertainment destination (**W3**), which was reflected in both awareness and image-related factors. Lastly, due to its lower GDP when compared to Spain (World Bank Group 2025), Portugal faces economic constraints (**W4**) as its public investment capacity is more limited, which may lead to significant differences in the attractiveness and quality of each country's available touristic opportunities.

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Moving now to opportunities, the FIFA World Cup represents an occasion to strengthen Portugal's position as a host destination for major international events (**O1**) and to promote global exposure and brand image development (**O2**) by leveraging the event's high reach media coverage and the country's cultural assets (e.g. music, gastronomy, landscapes) (Knott et al. 2016). Although it has achieved great results in the CBBETD evaluation, the event represents a great place to foster visitors' loyalty to tourism gain (**O3**), by converting short-term attendees into long-term repeat tourists and potential investors (Saint et al. 2019). It will also be a chance to position Portugal as an innovation hub for hospitality and events management (**O4**) through the launch and development of breakthrough technological solutions that enhance digital services, infrastructure, communication, and, ultimately, urban advancement (Marchesani and Ceci 2025). Finally, looking at the co-host situation through a collaborative lens can be very beneficial. In this way, cross-market synergies with Spain and Morocco should be created (**O5**) through the development of multi-destination packages.

At last, three threats were identified. Firstly, the high level of competitiveness between co-hosts (**T1**) will make it difficult for Portugal to stand out and influence tourist's choice, particularly given Spain's popularity in the football and tourism sector, and its high likelihood of hosting — alongside Morocco — the most important stages of the competition due to stadium capacity (Público 2024). Also, as inflation registers unstable levels and exceeds pre-pandemic values (Pordata 2025), prices have shown inconsistent increases. This may contribute to the decline of the "value for money" perception, which is already a weaker perceived factor, both in terms of quality as in loyalty (**T2**). Local's opposition (**T3**) should also be considered as, in a country already facing several challenges aggravated by tourism growth (e.g. rising rents, overcrowding, congestion), residents may feel some discontent with the conditions imposed by the event, leading to potential tension and conflicts with tourists, as it was witnessed in some European cities (Bloomberg 2025).

4.4. PESTEL Analysis

As a co-host of the 2030 FIFA World Cup, Portugal faces a mix of opportunities and challenges across political, economic, social, technological, environmental, and legal dimensions.

In the **political** sphere, the country can take advantage of the EU and Schengen area free mobility but has to dutifully plan and justify major public investments in a time of unyielding social expectations. In addition, Portugal may see a stronger cross-border tourism because of the cooperation with Spain and Morocco, while risking being overshadowed by its partners.

Economically, the mega-event promises a boost in tourism and consumption; however, these gains are dependent on the global economic conditions in the leading up and during 2030 and may concentrate mainly in Lisbon and Porto, reinforcing regional disparities. Regarding **social** factors, Portugal's rich football identity and superior hospitality reputation are major competitive advantages, but the increased flow of visitors could strain regional communities already affected by overtourism, all while having to manage risks associated with fan behaviour and crowd management. Pertaining to **technological** systems, the World Cup opens the door to numerous digital improvements, from mobility services to administrative procedures, but Portugal must warrant that the upgrades deliver long-term public value, beyond FIFA's immediate needs. Moreover, **environmental** factors such as rising temperatures and increased air travel propelled by the event could compromise logistics and sustainability commitments, obliging Portugal to implement credible and effective heat-management and emissions-mitigation strategies. Finally, the **legal** landscape will require active and continuous oversight; from monitoring price fluctuations and protecting temporary workers to adapting to FIFA's commercial ecosystem, Portugal must adjust its laws to accommodate the atypical conditions.

In summary, the level of success Portugal can attain across different dimensions depends on its ability to convert temporary visibility, tourism surge and economic gains into a resilient, inclusive, and sustainable legacy.

5. Sub-research question:

How can insights into travel behaviours and motivations support Turismo de Portugal in developing effective marketing strategies for the FIFA World Cup 2030?

5.1.Literature Review

With the growing importance of events in destination marketing, countries are increasingly seeking to leverage mega-events for brand development, as they increase visitation, reduce tourist flow seasonality, boost the destination's position in the market, and promote its development. Therefore, identifying how to harness potential visitors' motivations and backgrounds to generate interest in the event, minimize perceived constraints, and ultimately convert that interest into actual travel and attendance has become a key challenge (Chalip and Kim 2003; Wang and Jin 2019).

As events become touristic attractions for both residents and tourists, it is essential for destination management organizations (DMOs) or event managers to base their marketing and managerial decisions around the attendees' profiles (Tkaczynski and Rundle-Thiele 2011). Profiling attendees in event sports tourism (i.e. traveling to be at a sports event) is central to identifying distinct visitor characteristics, motivations and behaviours, especially in events that generate some of the highest rates of tourism arrivals, such as the FIFA World Cup (Gibson 1998; Wang and Jin 2019). Event tourism must be understood from both the demand and supply perspectives. Regarding the first, this involves identifying who travels to events and why they do so, who attends events while traveling, how these event tourists behave and spend, besides assessing how the events shape destination image and place marketing (Getz 2008).

The notion of profiling emerged as a natural extension of market segmentation, which was introduced by Smith (1956), and it is characterized as looking at the heterogeneous market as several smaller homogeneous ones that represent specific consumer needs to generate higher

value. According to Kotler (1980), there are four segmentation bases – demographic, geographic, psychographic, and behavioural – and their employment varies depending on the type of study (Wedel and Kamakura 2003; Dolnicar 2008).

Existing Studies on Profiling in Sports Events

According to Wang and Jin (2019), in the context of sports events, customers can be divided into three types: spectators, viewers, and participants. These groups vary in motivation, expectation, channel of communication, and mode of travel, and respond in distinct manners to event and destination marketing, especially for customers who have already attended the event (for recurring events) or visited the host destination.

Dann's (1977) push-pull theory distinguishes travellers' internal motives from the destination attributes that attract them (Crompton 1979). In other words, push motivations try to explain the desire to go on vacation, while pull motivations focus on the choice of place of travel (Baniya et al. 2016). In sports events, research shows that fan motives are multidimensional and moderately predict attendance or interest, underscoring the need to also consider general travel motives and demographic factors – such as age, gender, education, income, and past attendance – to also improve predictions of sport event attendance and travel behaviour (Zhang et al. 1996, 2001). On the pull side, events operate as destination attractions, and their appeal is shaped not only by the competition but also by the atmosphere and activities that surround them (Chalip 1992; Getz 2008).

Some authors set their studies on previous editions of the FIFA World Cup tournament (e.g. Brown et al. 2018). For instance, Carvache-Franco et al. (2024) centred its study on the FIFA World Cup 2022, in Qatar, to understand the main motives behind viewer's attendance to a world football championship and how these shape the overall satisfaction of sports tourists. The findings reveal four distinct motivational dimensions: Escape & Relaxation, Patriotism &

Attachment, Sports Passion, and Recreation, with only the first two revealing a significant correlation (positive and negative, respectively) with overall tourist satisfaction.

Bundling in Event Marketing

Within the broader framework of marketing strategies, the concept of bundling (Guiltinan 1987) emerged in the context of sporting events. As presented by Chalip and McGuirly (2004), it refers to the combination of event features with the attractions and activities available at the host destination “in a single package for a special price”. This approach is based on the notion of mutual reinforcement, as events can not only attract visitors to a destination, but the destination can help attract (and even extend) visitations to and post-event. These authors’ findings highlight the effectiveness of jointly marketing the event and the destination as a cohesive tourism product. They also mention the challenge that is selecting the combination of components that will attract the most visitors, and the importance of determining the value attributed to each element by potential event attendees.

The preceding discussion highlights the central role of profiling in achieving marketing effectiveness, particularly within the context of sports and mega-events, and its influence on a destination’s brand. As Portugal’s first sports mega-event in over two decades, the 2030 FIFA World Cup offers a valuable opportunity for research and analysis.

5.2. Methodology

In the following section, a descriptive and exploratory study was conducted through frequency distribution analysis of the survey respondents’ travel behaviours and motivations. In addition, two Chi-square tests of independence were performed using Jamovi 2.6.44 on variables that met the assumptions for categorical analysis – nationality x length of stay and nationality x awareness – to examine potential associations. These two were selected for their pronounced differences between samples and their clear strategic relevance for the topic. All other potential

variables were analysed descriptively due to distributional constraints or because their structure did not meet conceptual assumptions required for inferential testing.

For analytical purposes, the responses were divided between domestic (Portuguese) and international participants, as the event represents a substantially different experience for these groups across several dimensions (e.g. logistics, price, accessibility) – which also justified the use of slightly different question formats –, allowing for a more meaningful interpretation.

5.3. Analysis

Analysing and Interpreting Results in Context of Limitations

Before diving into the chapter, it is important to recognize some limitations that have impacted the analysis of the following data. Firstly, note that a software malfunction caused a small number of participants' answers to two mandatory questions – nationality ($n = 262 < 263$), and number of leisure trips to Portugal in the last five years ($n = 182 < 185$) – to go unrecorded, even though their surveys were marked as fully completed. For this reason, the analysis will always focus on the percentages corresponding to the valid responses recorded (although the numbers can be found on Appendix 9). Furthermore, significant inequalities in sample composition must be acknowledged. The international sample (which had over 20 nationalities) accounted for only 26% of total survey participation ($n = 68$), while the domestic sample represented 74% ($n = 195$). Additionally, there is a clear demographic distribution bias, as both samples skewed toward younger and female respondents. Consequently, a careful analysis and interpretation of the following results is required, especially in what concerns its generalization.

1. Descriptive Results

Through the first filter question, it was discovered that 78% of the international respondents have already visited Portugal, with 89% of these trips occurring within the last five years. The domestic sample was restricted to respondents who had undertaken at least one leisure trip in

Portugal in the same period, of which 95% responded affirmatively. This allowed to account for post-pandemic changes in tourist behaviour (Sharma et al. 2024) without compromising sample size. Regarding visitation frequency, 45% of international tourists visited Portugal more than 4 times, 28% from 2 to 3, and 26% only once. A similar pattern was observed in the domestic side, which registered percentages of 65%, 28%, and 7%, respectively.

Travel characteristics

In terms of travel companions, 32% of international tourists travelled with their family, 28% with friends and 25% alone, while visiting with a partner was less common (6%). Among domestic tourists, 57% of the respondents travelled with their family, followed by their partner (23%) and friends (17%), with solo travel accounting for only 2% of the responses. Porto & Norte (32%; 24%), Lisbon (28%; 16%) and Algarve (22%; 17%) emerged as the main destinations visited by both international and domestic visitors, respectively.

The length of stay revealed the first significant divergence between groups, as 44% of international visitors reported long-term stays (10 or more nights), 17% medium-term (7-9 nights), and 39% short-term (1-6 nights), while for domestic tourists these categories accounted for 4%, 16% and 81% of the answers, respectively. In terms of accommodation preferences, 43% of internationals selected short-term rentals via online platforms, whereas 35% of domestics preferred hotel chains or resorts. These options were the second most selected by the opposite group (15% and 26%, respectively).

Regarding spendings per person (including accommodation, transportation and activities), international visitors showed a balanced split between the two lowest spending brackets (30%), followed by a steady decline across intermediate ranges, with a reversal in the highest interval, where 11% reported spending more than 3,000€. Among domestic tourists, 51% spent up to 500€, 30% between 501-1,000€, while higher spending brackets started at 9% and declined

progressively. Furthermore, an exploratory cross-tabulation between travel companions and expected spending was conducted for both groups (see Appendix 11 and Appendix 12).

Travel booking and planning behaviour

Booking behaviour was largely similar across groups. Online booking platforms were used by 72% of international and 64% of domestic tourists, followed by providers' websites (17%; 18%). Travel agencies were used by 10% of Portuguese visitors but only 2% of internationals. In terms of planning tools, online search engines (28% international; 35% domestic), online maps (17%; 12%) social media (16%; 14%), and travel websites (13%; 14%) were the most frequently used sources. Official destination websites accounted only for 8% of international and 7% of domestic responses. Generative AI and AI apps for itinerary remained marginal, with the combined percentages of 6% and 7%.

Travel motivations and preferences

When asked about what motivated their last visit, 62% of international tourists reported leisure, followed by visiting friends and family (15%), business travel (13%), and attendance at events or conferences, allowing to understand what typically brings them to the country. Regarding leisure activities, international visitors mainly combined coastal experiences with cultural activities, while domestic tourists additionally emphasised nature and outdoor experiences, alongside wellness and relaxation. In both groups, the option "sports (practice or view)" was the least voted, accounting for only 1% and 3%, respectively. Post-visit preferences further reinforce these patterns. The most selected activities among both groups were tasting the local cuisine (29% international; 22% domestic), experiencing local culture (23%; 15%), enjoying nature (15%; 23%), and learning about the history and cultural heritage (15% for both). Sports-related activities remained among the least selected (7%; 3%).

Portugal's competitive advantage, for international tourists, was primarily associated with the weather and landscapes (19%), and the ability to visit friends and family (13%). For domestics, it was mostly about exploring different regions of their country (27%), and the convenience (24%). For both groups, the affordability was also a main factor (15%; 14%).

Awareness and likelihood of attending the World Cup

Awareness of Portugal as a FIFA World Cup 2030 co-host differed substantially. While 61% of domestic respondents were aware, 62% of international respondents were unaware. Regarding attendance likelihood, around 50% of respondents of each group expressed neutral or positive intentions.

Potential World Cup trip planning

Only respondents with non-negative attendance intentions continued to this part. Here, the previous question-by-question analysis will not be maintained.

Regarding international respondents, 65% intends to combine World Cup attendance with leisure, 15% would travel for professional purposes, 12% solely for the matches, and 9% for World Cup-related activities. Planned stays were predominantly short-term (76%), while only 12% opting for medium- or long-term. Expected spending per person (excluding match tickets), concentrated between 501-1,000€ (32%) and up to 500€ (29%), while higher spending brackets were less common. Interest in all-inclusive packages – used to determine bundling potential – was mainly conditional, depending on price (32%) or match location/type (29%), while 21% expressed unconditional interest and 18% preferred independent planning. Furthermore, 59% perceived value in combining their trip to Portugal with another host country, namely Morocco (12%), Spain (18%), or both (29%). Open-ended responses highlighted cuisine, weather, culture, affordability, safety, friendliness of locals, novelty, and Portugal's football identity as the country's competitive advantage compared to the other hosts.

Among domestic respondents, 42% would organize their trip solely to attend the match(es), 40% would combine it with leisure, and 18% would engage in World Cup-related activities. In addition, 73% would be willing to travel to another Portuguese region to attend a game, while 11% were uncertain, and 16% unwilling. Regarding spendings (excluding match tickets), 47% indicated a budget of 51-150€, 26% up to 50€, and fewer than 10% above 300€. Interest in all-inclusive packages was predominantly conditional (54% price-dependent; 6% match-dependent), while 19% expressed clear interest and 21% preferred independent organisation.

2. Chi-Square Test Results

The two chi-square tests revealed statistically significant associations between nationality and length of stay ($\chi^2 (2, N = 238) = 61.0, p < 0.001$), as well as between nationality and awareness of Portugal's role as a co-host of the 2030 FIFA World Cup ($\chi^2 (1, N = 263) = 10.6, p = 0.001$). Corresponding cross-tabulations are presented in Appendix 10.

5.4.Discussion

The analysis of the two samples reveals behavioural and motivational patterns that provide important insights for tourist profiling and pre-event marketing. It is important to reference the previously indicated limitations as a reminder that this interpretation requires caution regarding generalizability, especially due to the registered demographic distributional bias.

Both groups displayed several points of convergence. Firstly, the fact that Portugal attracts repeat visits from both groups of tourists reflects positively on destination brand loyalty and corroborates the CBBETD results; it also suggests that Turismo de Portugal can rely on a substantial existing base of potential attendees, rather than depending exclusively on attracting new visitors to the country – which helps in value creation, as new customer acquisition costs 5-25x more than retaining an existing one (Gallo 2014). Moreover, both samples already travel organically to the two World Cup host cities, indicating that both Lisbon and Porto benefit

from established visibility and may require less promotional investment in the pre-event phase. In addition, although AI-based travel planning tools are gaining traction globally (Kantar 2025), respondents continue to favour familiar booking and planning platforms. This slower adoption curve is strategically relevant for Turismo de Portugal, signalling that digital innovation should be introduced gradually and complemented with user-friendly, trust-building communication rather than assuming immediate consumer uptake. Finally, both groups are price-sensitive, although internationals show greater spending dispersion in family and solo travel, while domestics remain largely budget-constrained. This suggests affordable baseline offers, complemented by selectively higher-value options for the first group.

Still in this topic, both samples revealed similar travel motivations and preferences. As the survey focused on types of leisure, destination competitive attributes, and preferred activities, these motivational results primarily reflect Dann's (1977) pull factors, as they refer to Portugal's external characteristics that attract visitors. The country's beaches, cultural attractions, gastronomy, climate, natural landscapes and affordability were the ones identified by both samples and are coherent with other authors' findings (Yuan and McDonald 1990).

Although internal push motivations were not directly measured in the survey, reasonable inferences can be made from the motivation-related responses when interpreted in the light of established frameworks, including Crompton's (1979) and Dann's (1981) socio-psychological models. Starting with the shared push factors, both samples exhibit motivations centred on the desire to explore, learn, and experience the destination, which reflects a joint interest in meaningful travel. Beyond these common push factors, however, there are significant differences between domestic and international respondents. To start, the domestic respondents' emphasis on "wellness and relaxation", "convenience" and "affordability" suggests the presence of escape-driven motives, showing a desire to reduce stress and seek rest. Their preference for short stays, familiar tools, and limiting their World Cup engagement to

match attendance further indicates a tendency toward ease, comfort and low-effort travel, which aligns with the previously described motive. Additionally, the fact that most domestic tourists visit Portugal accompanied (as opposed to internationals), may point to another of Crompton's push factors – the enhancement of kinship relationships – where travel is seen as an opportunity to strengthen bonds with family and friends through shared experiences. In contrast, international tourists' emphasis on Portugal's attributes, along with longer stays and interest to convert their World Cup attendance into a leisure trip, suggests a stronger inclination toward novelty-seeking and deeper destination engagement. Based on these insights, Turismo de Portugal should adopt a dual-focused strategy that aligns promotional content and product development with the distinct psychological drivers of each group (without forfeiting the common ones). For instance, prioritising low effort and affordable booking options, while emphasising relaxation-oriented activities could be particularly effective for domestic tourists. For internationals, investing in multi-purpose traveling through bundling, could be important. For both, offering learning-fostering cultural activities should be included.

Shifting the focus to the distinctive patterns registered between groups (although some were already mentioned), the chi-square tests allowed to establish two clear distinct associations. Firstly, international tourists tend to overwhelmingly engage in longer trips to Portugal, whereas domestic tourists predominantly take short-duration getaways. This pattern aligns with previous research, which has pointed that lower travel distance, effort and cost lead to short-term visits by nearby markets, as they face minimal logistical and financial commitments. In contrast, international tourists tend to stay longer to justify the greater time, monetary investment and planning involved (Thrane and Farstad 2012). To correct this, the authors' suggestions focus on converting short-term trip behaviour by promoting multi-stop itineraries, affordable activity-based packages, and improve tourist satisfaction and mobility within the destination, all tactics that could be explored by Turismo de Portugal. However, when this topic

emerged in connection to the World Cup, it is important to note that the baseline pattern for internationals shifted noticeably: respondents concentrated their planned stays around short visits. This descriptive reversal suggests that the event is currently being subconsciously framed by international audiences as a focused, match-oriented trip rather than an opportunity for extended holidays, contrarily to their demonstrated willingness to do so. This is also conveyed by the fact that the value appointed for spendings significantly decreases when the question is asked in the context of the competition. Building attractive offers through bundling has thus, once again, become very important.

Secondly, knowledge of Portugal's co-hosting status is unevenly distributed across audiences. This significant difference highlights a critical communication challenge for Turismo de Portugal as, despite the country's strong tourism brand, international respondents demonstrate low awareness of Portugal's hosting role in the 2030 FIFA World Cup – which is a vulnerability. According to event-leveraging and destination branding literature (Chalip 2004; Kim and Chalip 2004), pre-event awareness is essential for shaping travel intentions and activating pull motivations. This situation may justify such lower results on likelihood of attendance, although they were similar to the domestic's ones. Portugal must then intensify international communication efforts, particularly in markets with low baseline knowledge, to ensure the event is positioned not only as a sports occasion, but also as a tourism opportunity.

Lastly, most respondents on both groups showed receptiveness to the idea of acquiring an all-inclusive package, which revealed extremely promising results for investing on bundle offers. For this reason, all previously presented insights should be leveraged into the designing of each segment's package, considering that this activity is proven to enhance perceived value by simplifying decision-making, create strategic advantages through inter-organized alliances, and strengthen destination marketing (Chalip and McGuirly 2004).

5.5.Recommendations

In this chapter, the described findings are translated into actionable strategy. The analysis of the previously discovered patterns, alongside relevant literature, helped identify key actions aimed at leveraging pre-event marketing activities to stimulate tourists' attendance at the 2030 FIFA World Cup and, ultimately, to strengthen Portugal's destination brand.

1. Bundling as a viable marketing strategy

Given respondents' clear openness to package-based travel, the findings highlight an opportunity for Turismo de Portugal to employ bundling as a strategic tool. The survey also facilitated the collection of a great number of insights that will help in designing the offers. This recommendation draws guidance on established literature, particularly Chalip and McGuirly's (2004) work on event-destination bundling.

Firstly, it is common for sports events to consider a mixed bundling strategy, where different combinations of components define a range of distinct bundles. Considering the diversity of behaviours and motivations gathered, this option is also extremely appropriate for the World Cup. Usually, bundles for sports event tourists combine components of event-related experiences with destination-based attractions. Based on the collected data, it is possible to attribute great importance to this last-mentioned topic, as both groups revealed great interest for cultural experiences (including in the identified pull factors). Agreements with touring companies and public/private cultural entities should then be a priority. Domestic-oriented packages could encompass the groups' relaxation focus, through discounted offers in wellness clubs close to the stadiums or via partnerships with hotels that offer this type of services. In addition, the different inferred push factors – though requiring more direct research – suggest that bundles for domestic tourists should prioritise simplicity and ease of purchase, whereas bundles for international tourists can emphasise multi-experience opportunities. This is

particularly relevant given their interest in combining travel to Portugal with visits to the other co-hosts, for which collaborative partnerships should be pursued **(O5)**.

A consistent feature across both offerings should be affordability, as it represents the main condition for respondents' interest on bundled options. Furthermore, the revealed spending patterns should be analysed and used as guideline for pricing strategies.

It is also important to recognize the relevance of the remaining data collected – including the type of accommodation that should be selected, the platforms where these offers should be promoted, and that shared-experiences packages would be an interesting investment for domestic tourists –, while retrieving inspiration from previous sports competitions, especially next-year's World Cup, as it will replicate the 2030 hosting model.

In a more practical note, considering other major sport events bundle release timelines, these offers should be planned to launch 12-18 months before the tournament (late 2028). Regarding resources, the focus should be in establishing the necessary partnerships to guarantee packaging success, and on developing seamless platforms for fans to acquire them. Having a product development team directly working on this subject and an appropriate budget are also necessary conditions. Main KPIs should evaluate the bundle's three stages: creation (number of bundles created and activated), purchase (package booking rate, conversion rate of campaign traffic to package sales, average revenue per visitor), and post-experience (satisfaction scores for bundled experiences). Long-term impact should also be measured through CBBETD's entertainment-related items, which should register higher scores.

2. Conduct in-depth market segmentation research

Although a comprehensive profiling of international and domestic visitors' motivations and behaviours was performed, the presented questions' formulation did not allow for deeper inference – a study limitation that should be acknowledge and, in further research, correctly

approached. For this reason, the second recommendation is for Turismo de Portugal to conduct a motivation-based market segmentation study aimed at identifying meaningful visitor clusters. This technique has been proven to support managers in improving marketing strategies' effectiveness, increasing competition and, consequently, event participation (Martínez-Cevallos et al. 2020). It also helps guiding budget allocation which, considering Portugal's economic constraints compared to other co-host countries (W4), only increases this strategy's value as it allows to maximise the benefits of hosting the event.

Although there are different criteria that can be chosen to base segmentation studies on, considering motivations' importance on tourists decision-making process to attend a sporting event, a psychographic variable should be the one selected. It must then focus on understanding the potential reasons (i.e. push factors) behind the 2030 World Cup attendance. As such, although several studies in the area have been conducted, Carvache-Franco's et al. (2024) framework offers a solid foundation and proven efficiency for this aim. The study's questionnaire is constituted by a set of 16 motivation-related items ranked in a 5-point Linkert scale, which are presented in a table on Appendix 13. They are also accompanied by the names and descriptions of the corresponding identified motivations for Qatar 2022 – Sports Passion, Escape & Relaxation, Patriotism & Attachment, and Recreation –, as well as some segment-specific practical recommendations that the article provides. These could be extremely useful in case the motivational factors found for the 2030 World Cup are similar to these.

Furthermore, existent literature has suggested that multiple segmentation variables should be used to categorize event attendees (Tkaczynski and Rundle-Thiele 2011). Hence, combining descriptive variables with predictive factors would be the best solution (Loker and Perdue 1992). For Turismo de Portugal, this would mean that, in addition to the motivation-items, some questions focusing on the sociodemographic characteristics of the respondents should be included (e.g. gender, age, education level, nationality), similarly to what Carvache-Franco et

al. did. Additionally, general travel motivations could also be explored, since they improve predictions of sport event attendance, as mentioned before (Zhang et al. 1996, 2001).

One of the factors from which the proposed study differs from Qatar's is the timeline, as this is set to be conducted in the pre-event phase. Therefore, it should be performed as soon as possible to allow for an adequate analysis and use in the development of the marketing strategies. The suggested period is Q4 of 2026 (after that year's World Cup) and must seek around 500 respondents. To maximize results, the study should be employed to people who reveal interest in attending the 2030 World Cup, and its distribution should be done in a way that guarantees a representative sample across all factors. Turismo de Portugal should leverage its connection to the FPF and other sports organizations for help spreading the questionnaire.

Regarding resources, an appropriate internal/external research team and software are needed (for development and analysis purposes), as well as both old and new strategic partnerships. For KPIs, these are related to two phases: the actual conduction of the survey (response rate and sample representativeness), and the implementation of its results (usage rate in marketing decisions, average revenue per segment and profiling effectiveness).

5.6.Conclusion

The presented recommendations seek to help Turismo de Portugal in achieving marketing effectiveness for the 2030 World Cup through more targeted and competitive offerings. Both recommendations were designed to remain feasible based on the publicly available financial data from Turismo de Portugal, as further contact with the organisation was not possible. Thus, the fact that Turismo de Portugal allocated €28.86M to external services in 2023 – a category that typically includes consultancy and research activities – and reported a net positive result of €73.8M euros, makes it seem achievable, considering the average market price of €30k-100k for segmentation studies.

6. Conclusion

This thesis offers a comprehensive framework to strengthen Portugal's destination branding through the leveraging of its co-hosting role of the 2030 FIFA World Cup. Central to this work were two interconnected topics – Tourist Profiling and Legacy of Mega-Events – whose analysis were enriched with insights provided by existing literature and diagnostic frameworks, including the CBBETD model, SWOTS and PESTEL.

The CBBETD model findings show that Portugal enters the pre-event phase with strong customer-based brand equity marked by high awareness, emotional resonance, and loyalty intentions, yet constrained by comparatively weaker sports-related associations and moderate perceptions of entertainment, value for money, and infrastructure.

The examination of the behavioural and motivational patterns of domestic and international visitors allowed to collect key insights to support Turismo de Portugal on the designing of its competitive tourism offers. These results reveal clear differences between samples, although both groups are primarily motivated by leisure-oriented experiences – particularly cultural and beach-related –, show preferences for affordability, and use similar digital tools. These patterns reinforce the strategic relevance of bundling, segmentation and targeted communication.

In parallel, the legacy and branding literature underscores that mega-events only generate enduring value when visibility is intentionally converted into long-term structural and perceptual gains. By aligning the World Cup with Portugal's existing brand strength, such as culture, hospitality, safety, and diverse of experiences, while actively addressing gaps in sports-related image attributes, Turismo de Portugal can transform short-term media exposure into durable resonance.

The synthesis of empirical and theoretical insights confirms that Portugal's ability to maximise the event's strategic impact depends on three pillars: leveraging its strong brand foundation,

developing behaviourally informed marketing strategies, and implementing legacy-oriented actions that sustain narratives, experiences and tourism flows beyond 2030. The recommendations made for Turismo de Portugal are based on these principals, and consist of exploring bundling as a competitive advantage, conducting market segmentation research, and designing an anticipated, structured, and strategic plan for positive intangible legacies related to destination image, emotional attachment, networks, and knowledge – all of which are synthetized on Appendix 14. If implemented, these are expected to lead to an increase of 15-25% in sports-related brand equity in two years post-event (London benchmark).

Ultimately, this thesis provides Turismo de Portugal with a foundation to initiate the planning and implementation of their strategic initiatives for the 2030 FIFA World Cup, highlighting the event's potential to act as a catalyst for short- and long-term destination competitiveness and sports tourism development.

7. Limitations and Future Developments

It is important to acknowledge certain limitations encountered in this research.

Starting by the survey, a great imbalance between Portuguese ($n = 195$) and non-Portuguese ($n = 68$) respondents due to difficulty in finding the correct distributional platforms for international engagement. It was also registered an overrepresentation of young and female participants, underlining the lack of older and male responses. These two factors may have had great impact in the generalizability of findings, potentially impacting the scope of the recommendations. In addition, the survey's recording error could have compromised the integrity of some questions' results. Finally, it could have been interesting to separate the samples by country of residence, instead of nationality, as it was assumed in the formulation of the survey's questions that Portuguese respondents are currently living in the country.

Group Part

Another limitation concerns communication challenges with Turismo de Portugal, which ceased responding midway through the process. This restricted access to further information, prevented the scheduling of an interview with the designated contact, and limited the opportunity to present and further refine the proposed recommendations with expert insights.

Despite these limitations, the findings contribute significantly with both theoretical and practical insights on the studied topics. Regarding potential future steps, beyond the recommendations already outlined, the suggestions presented here focus specifically on the core theme of this work: Portugal's destination branding.

Firstly, given the event's significant role in Portugal's destination development, it is important to prematurely recognise the numerous factors that can influence it and the positive and negative influences they can have on future outcomes. For instance, a successful event execution may strengthen the country's CBBETD, whereas shortcomings – such as ineffective heat-wave control measures, technological breaches, and overshadowing by other co-hosts – may do the opposite. In this sense, further research examining these potential factors and their effects is warranted, alongside the development of contingency plans that address both favourable and adverse scenarios. It would also be extremely relevant to study the evolution of Portugal's CBBETD throughout the event's time. A replication of the CBBETD survey applied in this thesis is then suggested in T0 (now), T1 (during the event), and T2 (6 months post-event) among a significant sample ($n = +500$). Finally, as this thesis identified, there is a clear mismatch between perceptions of Portugal as a cultural destination and as a sports destination, which was evident in both CBBETD results and survey responses. Then, further lines of research could answer the following question: Will the registered discrepancy persist after 2030, or will the World Cup contribute to a lasting rebranding of Portugal as a sports destination?

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9. Appendix

Appendix 1 – Comparison of Aaker’s and Keller’s Brand Equity Models

Feature	Aaker’s Brand Equity Model	Keller’s CBBE Model
Core idea	Brand equity is a set of brand-related assets and liabilities that add or subtract value	Brand equity stems from customer knowledge – what consumers remember (brand awareness), think and feel, (brand image)
Structure	A multidimensional asset-based model	A pyramid illustrating four sequential steps and six building blocks
Main components	1. Brand Awareness 2. Perceived Quality 3. Brand Associations 4. Brand Loyalty 5. Proprietary Assets	1. Brand Salience (Identity: Who are you?) 2. Brand Meaning (Performance & Imagery: What are you?) 3. Brand Response (Judgements & Feelings: What about you?) 4. Brand Resonance (Relationships: What about you and me?)
Ultimate Goal	To increase commercial value for the firm – e.g. premium pricing, trade leverage	To achieve brand resonance – deep, active, loyal relationship with customers

Appendix 2 – Survey’s CBBETD model

How do you **perceive Portugal as a tourist destination**? For each statement, please choose if you strongly disagree (1), disagree (2), neither agree or disagree (3), agree (4) or strongly agree (5).

	1	2	3	4	5
Portugal is a popular tourist destination	☐	☐	☐	☐	☐
Portugal is quite attractive and known	☐	☐	☐	☐	☐
Whenever I think of any sports destination, Portugal comes to my mind at first	☐	☐	☐	☐	☐
Portugal has lovely towns and cities	☐	☐	☐	☐	☐
Portugal has interesting cultural and historical attractions	☐	☐	☐	☐	☐
Portugal offers good opportunities for recreation and sports activities	☐	☐	☐	☐	☐
Portugal offers good opportunities for entertainment	☐	☐	☐	☐	☐
The people in Portugal are friendly and hospitable	☐	☐	☐	☐	☐

Portugal is safe and secure	☐	☐	☐	☐	☐
Portugal provides good value for money	☐	☐	☐	☐	☐
Portugal has high quality of accommodation	☐	☐	☐	☐	☐
Portugal has high quality of infrastructures	☐	☐	☐	☐	☐
Portugal has appealing food facilities	☐	☐	☐	☐	☐
Portugal has exciting atmosphere	☐	☐	☐	☐	☐
I intend to visit Portugal in the future	☐	☐	☐	☐	☐
I would advise other people to visit this destination	☐	☐	☐	☐	☐
I would choose Portugal for my holiday even if the costs were higher	☐	☐	☐	☐	☐

Appendix 3 – Structure of the Questionnaire

Section Number	Designation	Purpose	Accessible to
1	Demographics	Collect descriptive information about the respondents	Previous Visitors and Non-Visitors
2	Trip to Portugal	Understand respondents' travel behaviours and motivations through the collection of data on their most recent trip to Portugal	Previous Visitors
3	CBBETD model	Measure the key components of Portugal's destination brand equity	Previous Visitors and Non-Visitors
4	FIFA World Cup 2030	Explore perceptions and behavioural intentions regarding the upcoming event	Previous Visitors and Non-Visitors

Appendix 4 – Descriptive Statistics and Reliability for CBBETD Dimensions

Variables Used in the Study	N	Mean (Std. Dev)	Cronbach Alpha (no. of items)
Destination Awareness	263	4.24 (0.742)	0.799 (02)
Destination Image	263	4.20 (0.61)	0.82 (06)
Destination Quality	263	4.10 (0.61)	0.76 (05)
Destination Loyalty	263	4.22 (0.64)	0.62 (03)
Valid N (list wise)	263	-	-

Appendix 5 – Detailed Descriptive Statistics for the CBBETD Items

Items Used in the Questionnaire	Variable Used	Mean	Std. Dev
Portugal is a popular tourist destination	Destination Awareness	4.32	0.81
Portugal is quite attractive and known		4.16	0.82
Whenever I think of any sports destination, Portugal comes to my mind at first	Independent Variable	2.81	1.15
Portugal has lovely towns and cities	Destination Image	4.55	0.73
Portugal has interesting cultural and historical attractions		4.40	0.83
Portugal offers good opportunities for recreation and sports activities		3.71	0.95
Portugal offers good opportunities for entertainment		3.94	0.874
The people in Portugal are friendly and hospitable		4.42	0.815
Portugal is safe and secure		4.20	0.81
Portugal provides good value for money	Destination Quality	3.85	0.92
Portugal has high quality of accommodation		4.13	0.84
Portugal has high quality of infrastructures		3.82	0.89
Portugal has appealing food facilities		4.55	0.75

Portugal has an exciting atmosphere		4.14	0.81
I intent to visit Portugal in the future	Destination Loyalty	4.56	0.74
I would advise other people to visit this destination		4.56	0.71
I would choose Portugal for my holiday even if the costs were higher		3.53	1.04

Appendix 6 – Detailed Analysis of CBBETD Items

Destination Awareness Items:

Respondents strongly agreed that “Portugal is a popular tourist destination” ($M = 4.32$, $SD = 0.81$), while the statement “Portugal is quite attractive and known” obtained a slightly lower, yet still high, mean score ($M = 4.16$, $SD = 0.82$).

Initially, the awareness dimension included the item “Whenever I think of any sports destination, Portugal comes to my mind at first”. However, this item had a very low item–rest correlation ($r = 0.137$) and substantially reduced the Cronbach’s alpha for awareness from 0.799 to 0.509. Considering both the statistical observations and the conceptual focus on a more specific “sports-related” awareness, this item was treated as an independent indicator rather than as part of the general destination awareness construct. This decision is consistent with Cortina’s (1993) recommendation to remove items that do not contribute to internal consistency when they appear to tap into a distinct facet of the construct. Nonetheless, results have revealed that Portugal is unfavourably perceived as a sports destination, as the mean for this question leans slightly toward the lowest side of the scale ($M = 2.81$, $SD = 1.15$).

Destination Image Items:

Respondents expressed remarkably favourable perceptions of the infrastructure and social environment imagery. The item “Portugal has lovely towns and cities” showed the highest mean in this dimension ($M = 4.55$, $SD = 0.73$), followed by “The people in Portugal are friendly and hospitable” ($M = 4.42$, $SD = 0.82$) and “Portugal has interesting cultural and historical attractions” ($M = 4.40$, $SD = 0.83$). In addition, safety was also evaluated positively, with “Portugal is safe and secure” scoring a relative high mean ($M = 4.20$, $SD = 0.81$). Conversely, items that were related to entertainment and sports scored comparatively lower mean scores, though still above-midpoint. The statement “Portugal offers good opportunities for

entertainment” recorded a mean of 3.94 (SD = 0.87), and “Portugal offers good opportunities for recreation and sports activities” showed the lowest mean in the image dimension (M = 3.71, SD = 0.95). These results suggest that while the cultural, historical and urban attributes of Portugal are strongly appreciated by respondents, there might, relatively, exist more space for improvement in terms of entertainment and sports-related image attributes.

Destination Quality Items:

The analysis of destination quality indicated a pattern of generally positive evaluations. The highest mean in this dimension was observed for “Portugal has appealing food facilities” (M = 4.55, SD = 0.75), indicating that gastronomy is a clear strength in the perceived quality of Portugal as a destination. Perceptions of atmosphere and accommodation were also favourable. The items “Portugal has an exciting atmosphere” and “Portugal has high quality of accommodation” recorded means of 4.14 (SD = 0.81) and 4.13 (SD = 0.84), respectively. On the other hand, respondents were more reserved in the evaluations of economic and infrastructural aspects. “Portugal provides good value for money” obtained a mean of 3.85 (SD = 0.92), and “Portugal has high quality of infrastructures” presented the lowest mean in this dimension (M = 3.82, SD = 0.89). In essence, the evidence suggests that while experiential and service-related aspects of quality (food, atmosphere, accommodation) are perceived as strong quality attributes, perceptions of value and infrastructure are comparatively weaker and may warrant further attention and work from destination managers.

Destination Loyalty Items:

Destination loyalty similarly received positive evaluations. The items “I intend to visit Portugal in the future” and “I would advise other people to visit this destination” shared the highest mean score in the dimension (both M = 4.56, SDs = 0.74 and 0.71, respectively), indicating strong intentions to revisit and to recommend the destination to others. The third loyalty item,

“I would choose Portugal for my holiday even if the costs were higher,” recorded a noticeably lower mean ($M = 3.53$, $SD = 1.04$), reflecting more conditional loyalty when price considerations are introduced. From a reliability standpoint, this item exhibited a relatively low item–rest correlation ($r = 0.303$) and removing it would noticeably increase Cronbach’s alpha for the loyalty scale from 0.618 to 0.778. Despite this potential improvement, the item was retained because it captures an important attitudinal aspect of loyalty related to price tolerance and because the resulting alpha (0.618) still falls within an acceptable range for exploratory research. Several methodological sources note that while 0.70 is a commonly cited rule-of-thumb threshold, values between 0.60 and 0.70 can be considered acceptable in early-stage or exploratory studies, particularly when the construct is theoretically coherent and the number of items is limited (Hair et al., 2019; Cortina, 1993; see also discussions of cut-offs in internal-consistency guidelines where $\alpha = .60$ –.69 is treated as “questionable” but not automatically unacceptable). This rationale supports the decision to retain all three loyalty items in the present analysis.

Appendix 7 – SWOT

Strengths (S) • S1: Increasing relevance in the tourism sector • S2: Positive global perceptions surrounding culture, hospitality, and safety • S3: Strong football heritage • S4: Highly diverse tourism offer • S5: Country's compact geography • S6: Country's affordability • S7: Accessibility and tourism infrastructures development • S8: Proven expertise in hosting large-scale events	Weaknesses (W) • W1: Overcrowded cities • W2: Infrastructure strains • W3: Low perceived quality of sports and entertainment offerings • W4: Economic constraints
Opportunities (O) • O1: Promote Portugal as mega-event destination • O2: Global exposure and brand image development • O3: Foster visitor's loyalty • O4: Position Portugal as an innovation hub • O5: Cross-market synergies	Threats (T) • T1: High level of co-host competitiveness • T2: Decline of “value for money” perception • T3: Locals' opposition

Appendix 8 – PESTEL Analysis

Political Factors:

- **Schengen Area Advantages and Constraints:** As part of the EU and the Schengen area, Portugal becomes a convenient destination for other member countries (no border control, common currency) (Council of the European Union n.d.). In opposition, fans from other continents are subjected to restrictive visa regimes. In particular, the potential regions with Lusophone connections have of being strong tourists' sources, is set back by visa regulations.
- **Region Rivalry and Soft Power:** The co-hosting format of the event poses both opportunities and threats for Portugal. On one hand, Portugal benefits from the possibility of cross-border tourism circuits, where fans attending matches in Spain or Morocco might extend their trips to Portugal and vice versa. This regional integration could enrich visitor experience and position the Iberian Peninsula as a holistic destination. On the other hand, Portugal faces the risk of being overshadowed by Spain's larger infrastructure and recognition as a major tourism destination, while Morocco might capture more media attention as the first North African country to co-host a World Cup.
- **Political Legitimacy:** In a democratic setting such as Portugal, hosting a mega-event like the FIFA World Cup raises questions of political legitimacy; not only regarding the legal authority of the government to allocate resources, but also the perceived fairness and rationality of those allocations in the eyes of citizens. The legacy of the Euro 2004 represents this predicament: despite being widely celebrated for its organization and atmosphere, post-event evaluations revealed underused stadiums and significant public expenditure with limited long-term return (Alm et al. 2014). Additionally, in recent years, Portuguese citizens have increasingly demanded greater

investment in social infrastructure. Therefore, the importance of a political narrative that reconciles the vast public spending on the tournament with the population's expectations for social investment. Protests against mega-event spending have taken place in the past, for instance the recent riots in Morocco, and if this narrative fails to convince, Portugal could face social and political contestation and spark discontent during the lead-up to 2030 (Amnesty International 2010; Chaffag 2025; Watts 2014).

Economic Factors:

- **Balancing Tourism Boom with Economic Volatility:** The FIFA World Cup is a strong catalyst for tourism growth, generating short-term gains across the hospitality, transportation, retail, and cultural sectors (Kim, Gursoy, and Lee 2006; Fourie and Santana-Gallego 2011). Nevertheless, the scale and sustainability of these economic benefits in Portugal are contingent on global and regional economic conditions leading up to 2030. International tourist flows are highly sensitive to macroeconomic variables such as inflation, disposable income, and exchange rates (Ongan, Işık, and Özdemir 2017), and the expected rapid influx of international visitors might generate temporary inflation, impacting domestic tourism. Moreover, despite the surge in tourist spending during the World Cup, this short-term boost has to account for the costs of preparation, including stadium renovation, infrastructure development, and security measures. If global economic conditions deteriorate or visitor numbers fall below the expectations, the event's economic benefits may not be sufficient, leading to a benefit–cost imbalance. Therefore, the challenge lies in converting temporary tourism spike into sustainable economic legacy.
- **Regional Disparities in Economic Tourism Benefits:** The distribution of tourism benefits generated by the tournament might be uneven across Portuguese regions. While Lisbon and Porto, established tourism destinations that have the biggest stadiums of the

country, are expected to attract the majority of visitors and investment; other cities such as Braga, Faro, or Guimarães may face challenges in attracting tourist flows or capturing significant economic growth during the tournament duration. This risks reinforcing pre-existing regional inequalities, as resources and visibility remain centred in the recognized urban hubs.

Social Factors:

- **Capital of football:** Portugal's deep football heritage, bolstered by Eusébio and Cristiano Ronaldo, is recognized worldwide by fans. This distinctive trait positions Portugal as a key destination for emotionally motivated fans who want to experience the authentic "football's homeland culture.". Still, Portugal will rival Spain, also a recognized capital of football, at attracting international spectators.
- **Hospitality identity under strain:** Portugal has gained international traction for its exceptional hospitality across tourism sectors, from accommodation to food services. Nonetheless, the rapid growth in international arrivals places local tolerance at risk, especially in cities already strained with overtourism. There's a risk that Portuguese communities might see international fans as disruptive intruders instead of welcoming them.
- **Event tourism as cultural exchange:** The FIFA 2030 allows Portugal to showcase its local heritage to visitors that might return in the future. From gastronomy, UNESCO heritage sites, to fado music, Portugal can integrate its cultural offerings into marketing products, event itineraries and trip bundles. This integration will ultimately reinforce Portugal's image in the mind of visitors, fostering a long-lasting emotional connection that can culminate in brand resonance.
- **Fan culture risks:** Portugal must prepare for cultural clashes between international fan groups, disruptive behaviours and hooliganism, especially in stadiums and vicinity.

Thus, crowd-management strategies will be essential to preserve community well-being and event integrity.

Technological Factors:

- **Digital readiness:** Host nations, including Portugal, are expected to invest in smart-technological solutions ahead of the event (apps, AI-driven translation, e-payments methods, etc.). These solutions are meant to improve attendees experience by streamlining access to information and resources, avoiding constraints and enhancing process efficiency. However, gaps between tech-savvy users and older or less digitally literate tourist segments may emerge, leading to uneven visitor experience quality.
- **Legacy of technological upgrades:** Short-term investments in technological infrastructure, such as transport management and upgrades, e-ticketing, and data platforms, can additionally boost tourism capacity long after the event. The tension lies in planning these investments with the long-term horizon and conditions in consideration; these innovations must serve the future public well-being and not only the immediate corporate/FIFA interests.

Environmental Factors:

- **Global warming risks:** Portugal is considered a mild-climate region, being internationally recognized for its temperate summer conditions. However, in 2030, following the continuous global warming and climate instability, Portugal is at risk of hosting the FIFA World Cup during abnormally hot months. In fact, a major concern for the upcoming 2026 FIFA World Cup is the potential extreme heat (Herman 2025). This could reduce fan comfort, limit players performance and increase health risks. Therefore, Portugal must account for these risks and plan ahead with heat wave

response plans, guaranteeing a smooth event experience for all parties involved in different scenarios (World Health Organization n.d.).

- **Carbon footprint of tourism:** As part of the EU, Portugal is expected to follow the EU Green Deal agenda and the emission reduction objectives imposed (European Commission n.d.). Nonetheless, tourism is considered a highly polluting sector and the expected increase of international air travel to attend the FIFA World Cup is expected to drive the event's largest environmental cost (Scott 2008). Portugal must carefully plan effective mitigation strategies that offset the emissions increase (e.g., carbon offsets, green mobility); risking being viewed as just symbolic, these measures must attain tangible impacts for the various parties.
- **Sustainable branding opportunity:** The upcoming mega-event will position the 3 host nations at the epicentre of global media attention, conferring Portugal an unique opportunity to pioneer "green mega-events". Leveraging the event to promote renewable energy stadiums, circular economy waste policies and sustainable tourism promotion could make Portugal a successful case study and improve its perceived image. Still, taking greenwashing risks into account, the sustainable claims must be effectively carried out to ensure legitimacy and solid impacts.

Legal Factors:

- **Price regulations:** Prices are expected to rise during the event, but competent authorities must monitor inflation to prevent price gouging. It's crucial to safeguard Portugal's brand image by protecting residents and visitors from hyper-inflated prices that do not reflect reality conditions. Hence, transparency in ticketing, accommodation, and transport allied with stringent price control are key to ensure this protection.

- **Labour law:** The short-term demand increase for hospitality staff will test Portugal's labour regulations. In such a hectic period, the balance of fair wages with temporary contracts could be compromised. Portugal must therefore protect the rights of these workers by legally regulate and closely supervise the labour market according to extraordinary circumstances.
- **FIFA's legal ecosystem:** FIFA's legal ecosystem imposes strict commercial and branding rules that require Portugal to temporarily adjust national laws, limit local business opportunities, and prioritize corporate interests over local sovereignty (FIFA 2023). This system establishes strict rules over governing branding, commerce, and event operations, with Portugal having to accommodate FIFA's commercial and governance requirements. For instance, FIFA controls all branding, advertising, and broadcasting rights, granting exclusivity to official global sponsors while restricting local businesses from using World Cup imagery or promoting competing products. In addition, local media face strict limitations on footage and coverage, and Portuguese companies may be excluded from commercial opportunities unless they align with FIFA-approved partners.
- **Public health protocols:** Although widespread vaccination mandates are unlikely in the post-COVID era, updated EU and WHO (World Health Organizations) mass-gathering protocols still impose strict health-management obligations on event organizers (European Commission 2022; World Health Organization 2025). Portugal must guarantee that hospitals can absorb surges in emergency visits, that there's sufficient ambulances and medical staffing for matches and that heatwave management protocols are in place. These obligations increase operational complexity and legal liability for host countries, requiring careful consideration.

Appendix 9 – Survey’s Questions and Answers

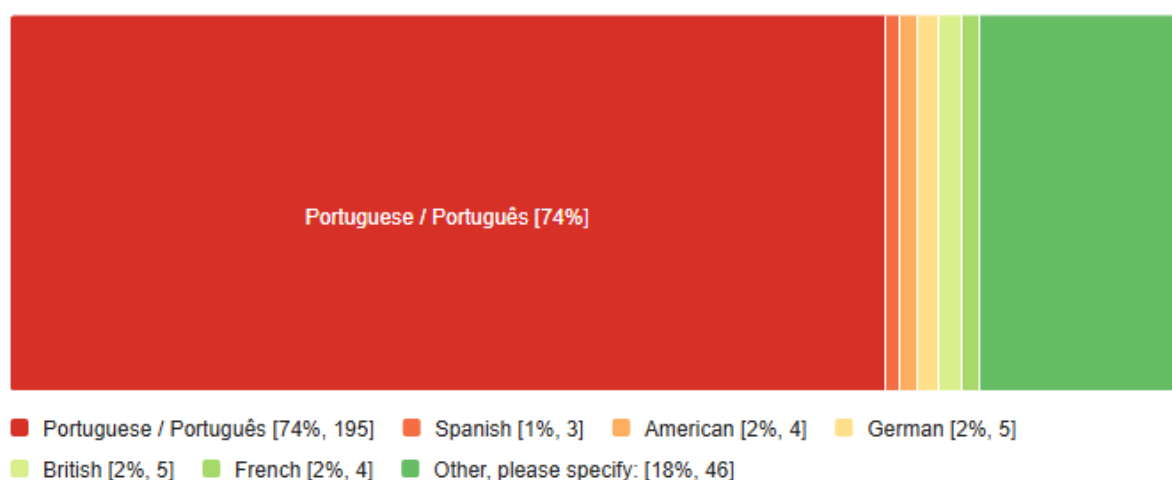
The following questions will be displayed in the same order they were shown to the respondents, and the corresponding survey sections are in *italics*. As most questions in Portuguese are equivalent to those in English, only the English version is presented. Exceptions occur when the questions differ, in which case the English Version is indicated as [EN] and the Portuguese version as [PT]. The potential answers that appear in Portuguese are also translated when needed. For questions that have “other” options and those that allow open answers, the list of written responses will be provided when these contributed with meaningful insights.

Please note that both samples’ graphs follow a colour-coded rule, as the ones regarding English responses are in blue shades (and always displayed first), while the ones for Portuguese responses appear in orange tones.

The N reported after each question refers to the number of responses. In questions allowing only one response, this value corresponds to the total number of respondents for that question, contrarily to the ones that allow for more, which are identified in **bold**.

Demographics

Question 1: What is your nationality? N = 262



Other, please specify:

- | | | |
|--------------|-------------|-------------|
| • Croatian | • Egyptian | • Chinese |
| • Romanian | • Latina | • Chinese |
| • Romanian | • Italian | • Chinese |
| • Polska | • Italian | • Chinese |
| • Italian | • Belgian | • Belgian |
| • Romanian | • Italian | • Chinese |
| • Italian | • Chinese | • Chinese |
| • Italian | • Italian | • Belgian |
| • Chinese | • Serbian | • Belgian |
| • Italian | • Norwegian | • Chinese |
| • Czech | • Italian | • Cypriot |
| • Czech | • Italian | • Catalan |
| • Brazilian | • Mexican | • Italian |
| • Italian | • Chinese | • Brazilian |
| • Indonesian | • Chinese | |
| • Brazilian | • Belgian | |
-

Informative Message:

[EN Version]



Welcome!

We are conducting this survey as a part of our Master's in Management thesis on destination branding and the FIFA World Cup 2030.

The purpose of this survey is to understand how Portugal is currently perceived as a travel destination by capturing people's opinions, associations, and experiences related to the country. The survey takes about **5-10 minutes** to be completed.

Your participation is entirely **voluntary and anonymous**. All responses will be used solely for academic purposes and cannot be traced back to individual participants.

If you have any questions, concerns, or if you are interested in receiving the results of this survey or the final thesis, please contact us at 67067@novasbe.pt or 66263@novasbe.pt.

Thank you for your help!

[PT Version]



Bem-vindo(a)!

Estamos a realizar este inquérito no âmbito da nossa tese de Mestrado em Gestão, sobre *destination branding* e o Mundial de Futebol 2030.

O objetivo deste inquérito é compreender como Portugal é atualmente percecionado enquanto destino turístico, através da recolha de opiniões, associações e experiências dos turistas que visitam o país.

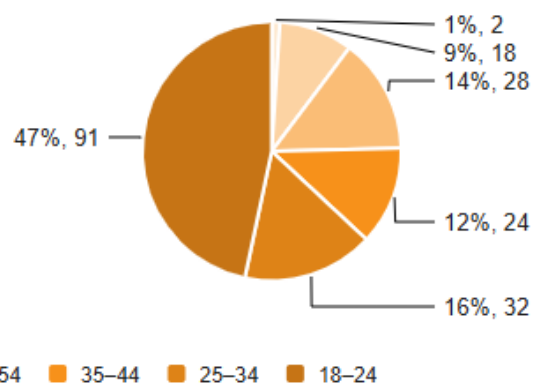
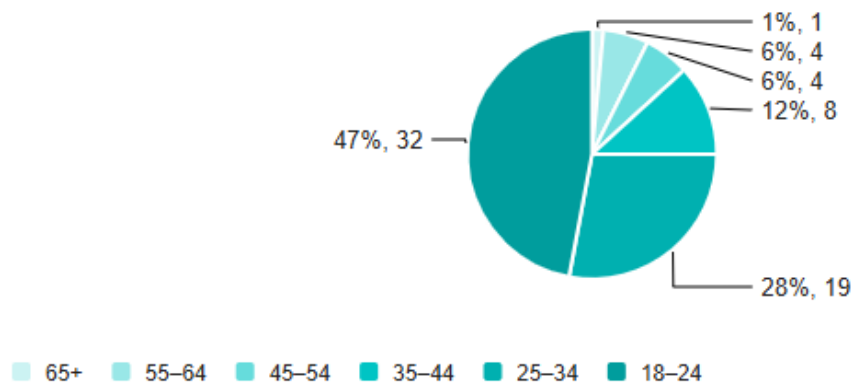
O preenchimento do questionário demora aproximadamente **5-10 minutos**. A sua participação é inteiramente **voluntária e anónima**. Todas as respostas serão utilizadas exclusivamente para fins académicos e não poderão ser associadas a qualquer participante individual.

Caso tenha dúvidas ou pretenda receber os resultados deste inquérito ou a versão final da tese, poderá contactar-nos através dos endereços 67067@novasbe.pt ou 66263@novasbe.pt .

Agradecemos desde já a sua colaboração!

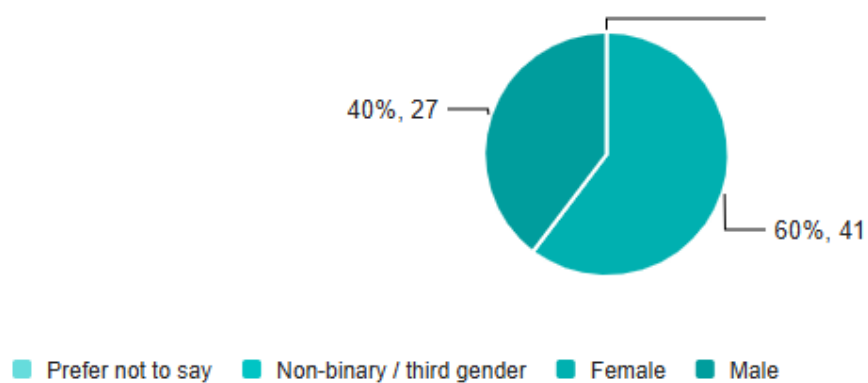
Question 2: Age Group

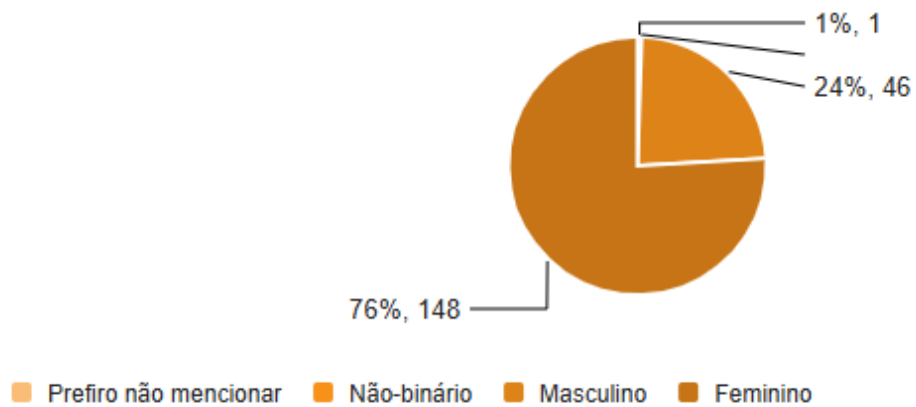
International: N = 68; Domestic: N = 195



Question 3: Gender

International: N = 68; Domestic: N = 195

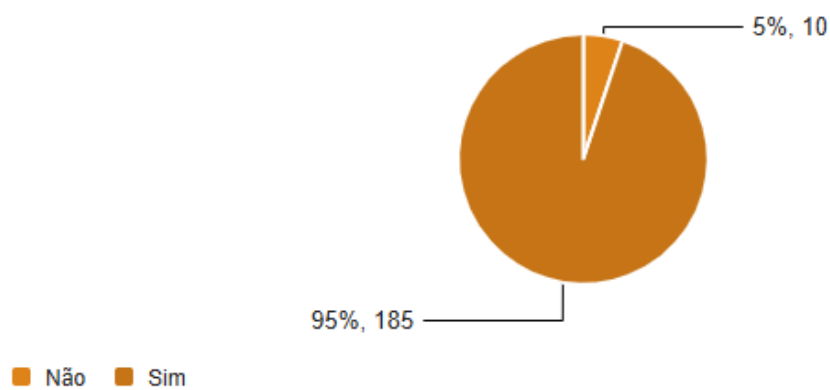
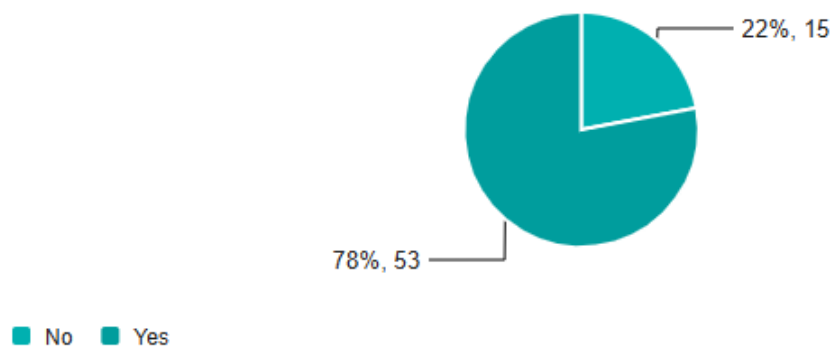




Options: Prefer not to say; Non-binary/third gender; Male; Female.

Filter Question 1 = Question 4: [EN] Have you ever visited Portugal? / [PT] Have you taken any leisure trip in Portugal in the last 5 years (minimum of one night away)?

International: N = 68; Domestic: N = 195

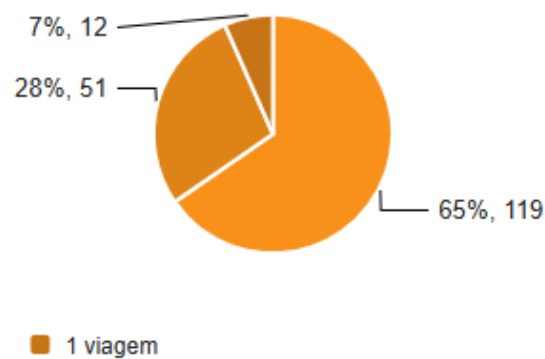
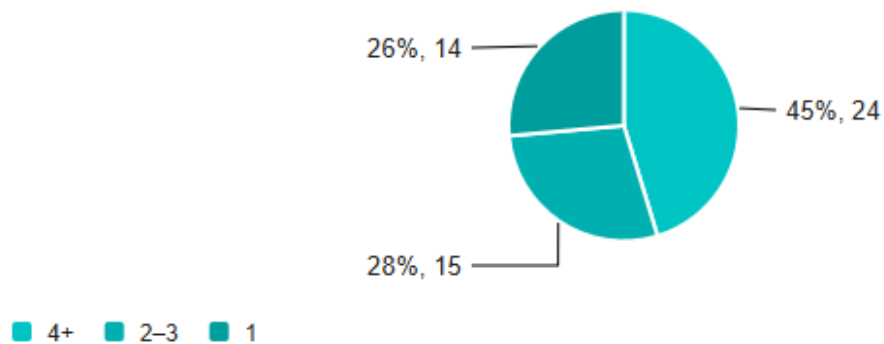


Options: No; Yes.

Trip to Portugal

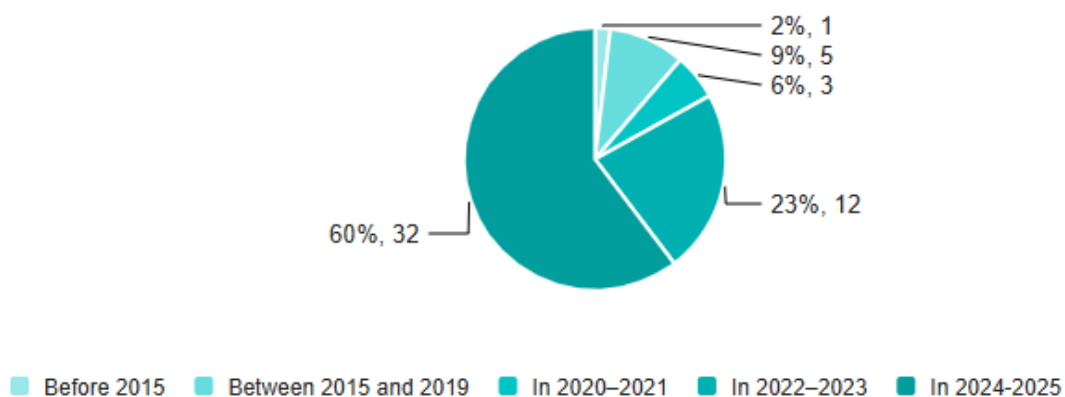
Question 5: [EN] How many times have you visited Portugal? / [PT] How many leisure trips have you done in the past 5 years?

International: N = 53; Domestic: N = 182



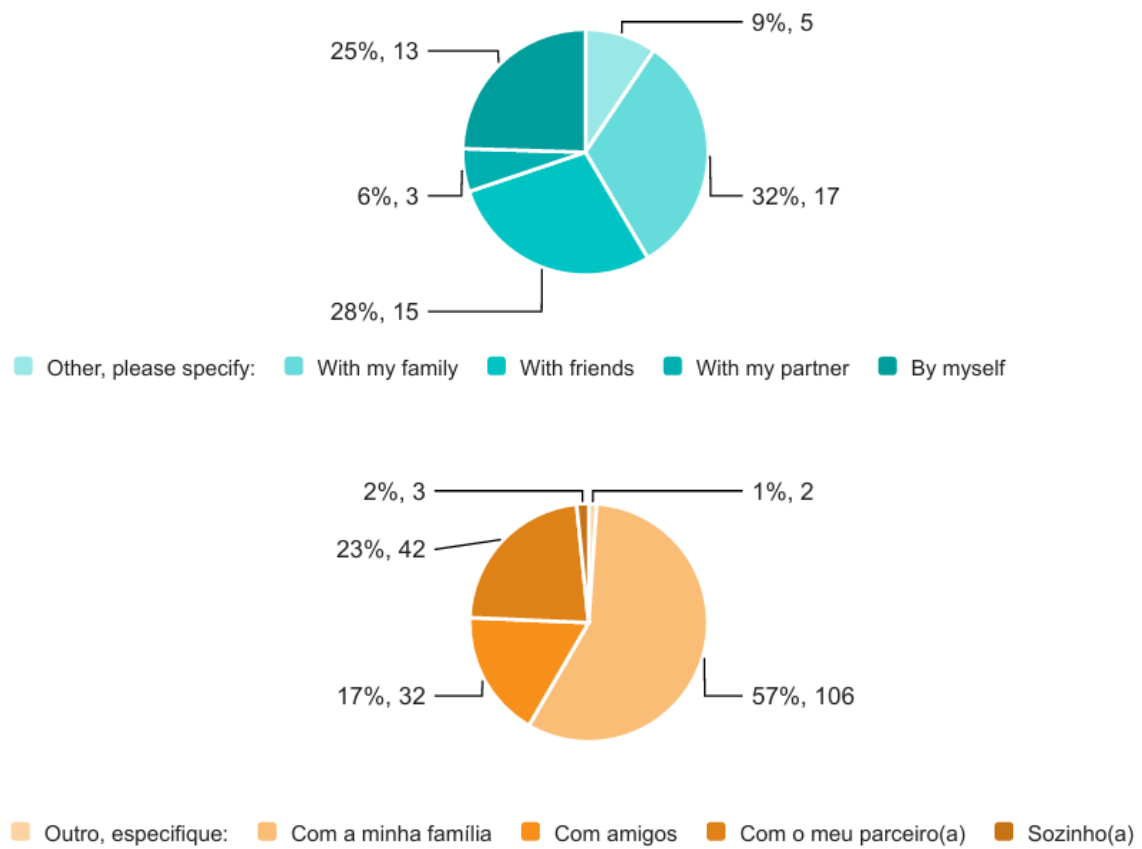
Options: 4+ trips; 2-3 trips; 1 trip.

Question solely for Internationals: When was the last time you visited Portugal? N = 53



Question 6: With whom did you travel to Portugal?

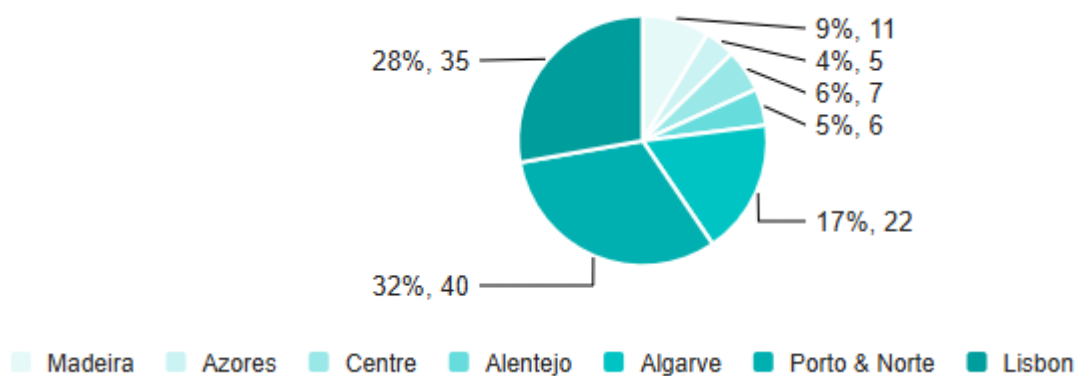
International: N = 53; Domestic: N = 185

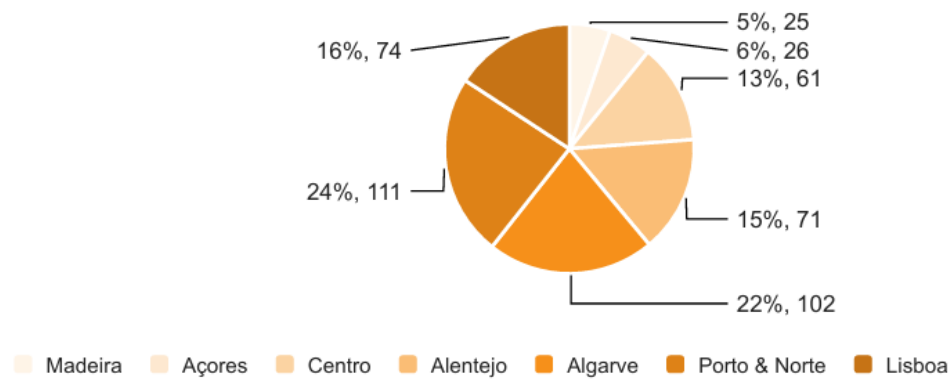


Options: Other, please specify; With my family; With friends; With my partner; By myself.

Question 7: Which Portuguese regions did you visit? (Select all applicable)

International: N = 126; Domestic: N = 470

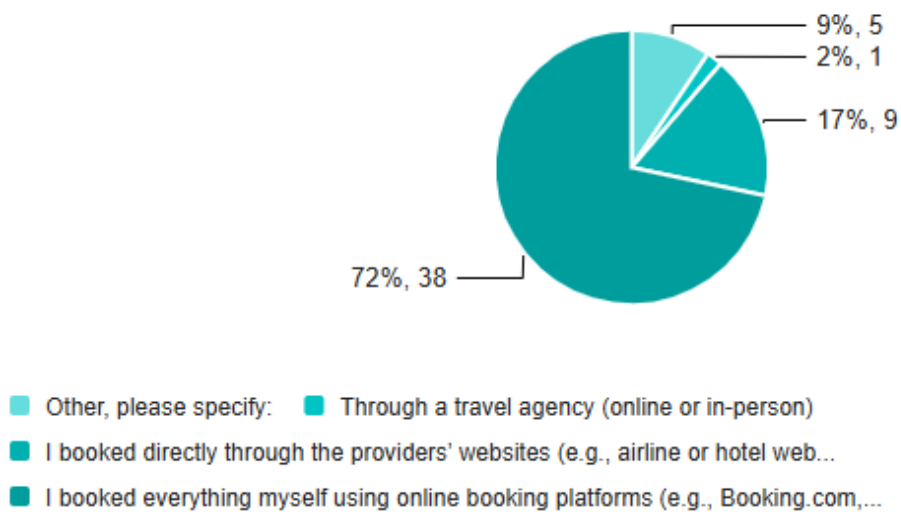


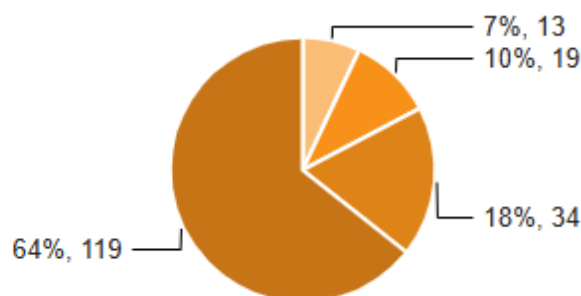


Options: Madeira; Azores; Centre; Alentejo; Algarve; Porto & Norte; Lisbon.

Question 8: How did you book your trip to Portugal? (Select the option that best describes how your travel accommodation was arranged)

International: N = 53; Domestic: N = 185



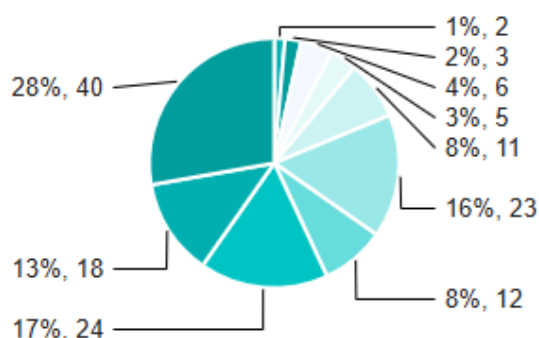


- Outro, especifique: Através de uma agência de viagens (online ou presencial)
- Reservei diretamente nos sites dos prestadores de serviços (ex.: companhia aé...
- Reservei tudo pessoalmente através de plataformas de reserva online (ex.: Boo...

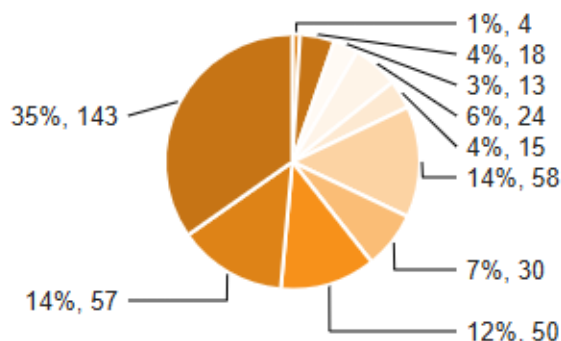
Options: Other, please specify; Through a travel agency (online or in-person); I booked directly in the providers' websites (e.g. airline or hotel website); I booked everything myself using online booking platforms (e.g. Booking.com, ...).

Question 9: Which digital planning tools did you use to plan your trip to Portugal? (Select all applicable)

International: N = 144; Domestic: N = 185



- Other, please specify: AI apps for itinerary Generative AI Online content bloggers

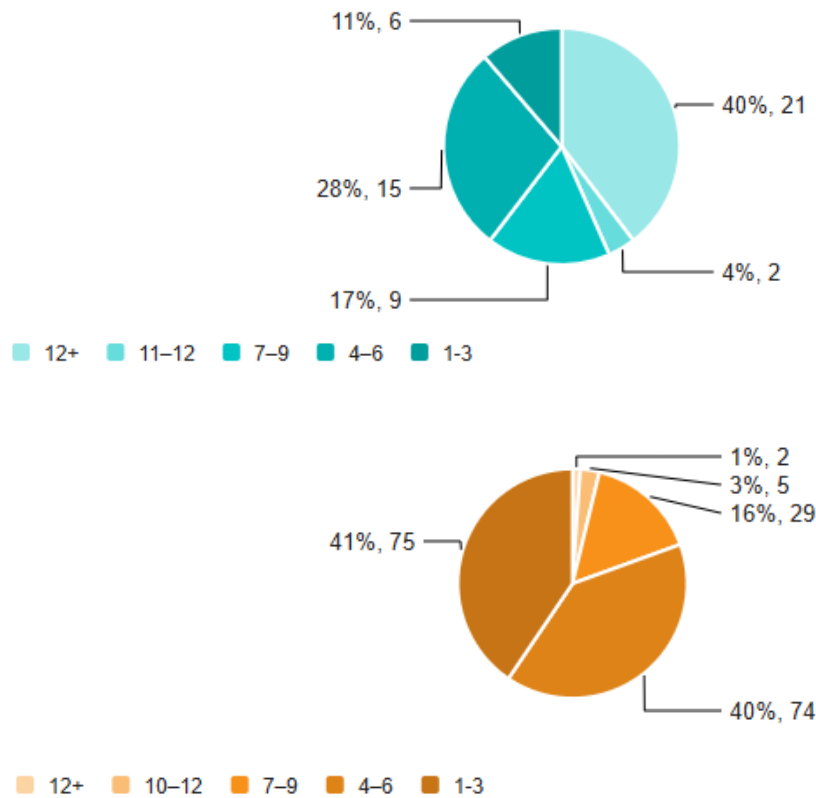


- Outro, especifique: Aplicações de IA para planejar itinerá... Ferramentas de Inteligência Artificia...
- Blogues ou criadores de conteúdos de ... Vídeos online (ex.: YouTube) Redes sociais
- Sites oficiais de destinos turísticos Mapas online Websites de viagens
- Motores de pesquisa online

Options: Other, please specify: AI apps for itinerary; Generative AI; Online content bloggers; Online videos; Social media; Websites of destinations; Online maps; Travel websites; Online search engines.

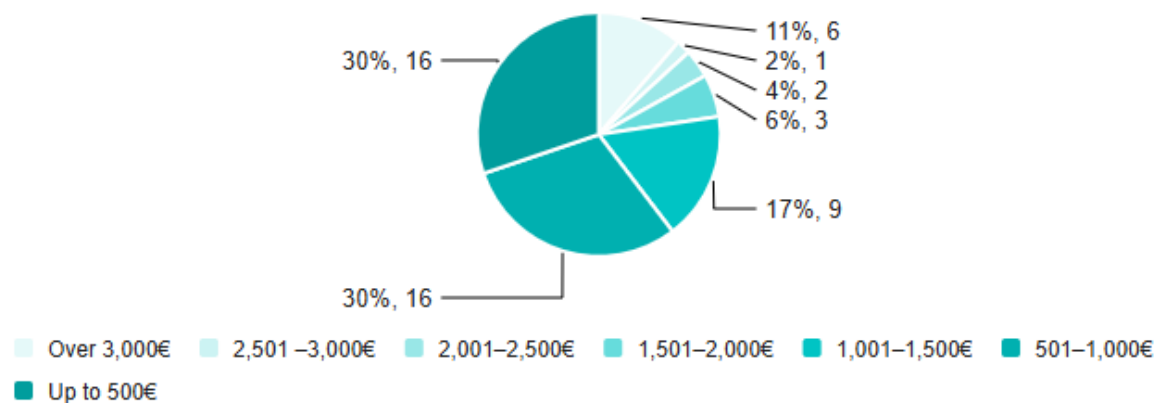
Question 10: Length of stay (number of nights)

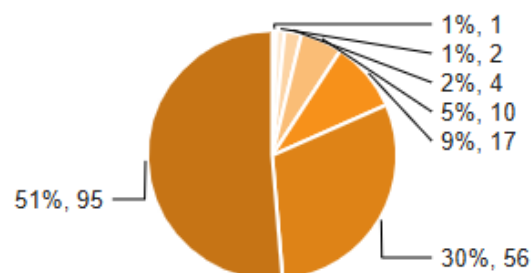
International: N = 53; Domestic: N = 185



Question 11: Total spend per person on the trip (including accommodation, transportation and activities)

International: N = 53; Domestic: N = 185

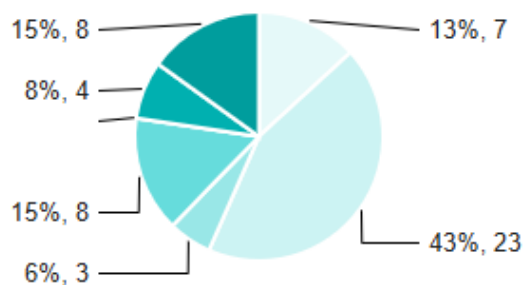




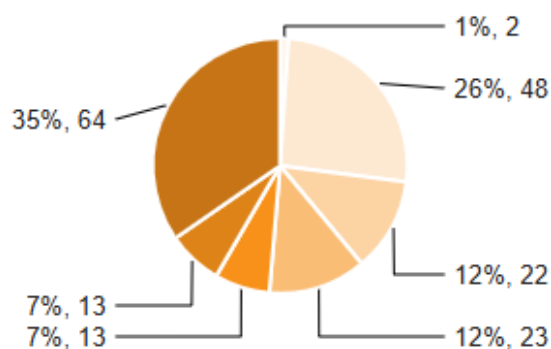
■ Mais de 3,000€
 ■ 2,501–3,000€
 ■ 2,001–2,500€
 ■ 1,501–2,000€
 ■ 1,001–1,500€
 ■ 501–1,000€
 ■ Até 500€

Question 12: Type of accommodation

International: N = 53; Domestic: N = 185



■ Other, please specify:
 ■ Short-term rental via online (i.e. Airbnb)
 ■ Independent hotel or resort
 ■ Friends or family home
 ■ Camping or caravan
 ■ Hostel or motel
 ■ Hotel chain or resort

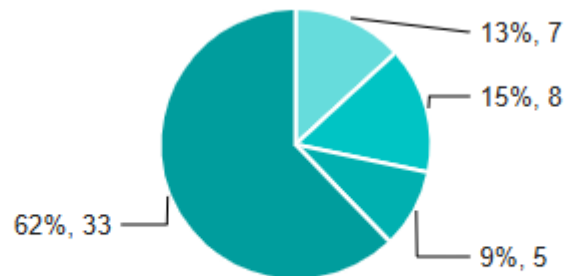


■ Outro, especifique:
 ■ Alojamento de curta duração reservado online (ex.: Airbnb)
 ■ Hotel ou resort independente
 ■ Casa de familiares ou amigos
 ■ Parque de campismo ou caravana
 ■ Hostel ou motel
 ■ Cadeia de hotéis ou resort

Options: Other, please specify; Short-term rental via online (i.e. Airbnb); Independent hotel or resort; Friends or family home; Camping or caravan; Hostel or motel; Hotel chain or resort.

Question solely for Internationals: What was your main reason for traveling to Portugal? N =

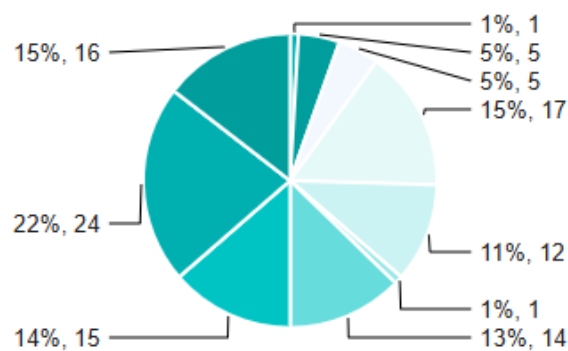
53



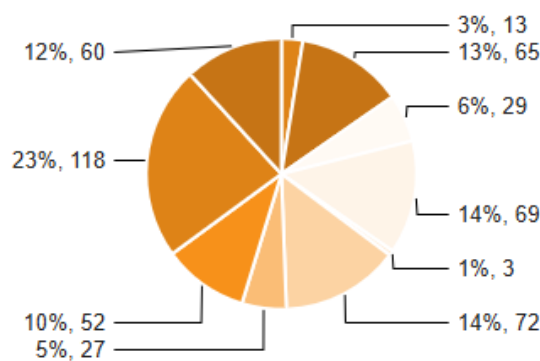
■ For business ■ Visiting family / friends ■ Attend an event / conference ■ Leisure

Question 13: What type of leisure trip did you do in Portugal? (Select all applicable)

International: N = 110; Domestic: N = 508



■ Sports (practice or view) ■ Wellness & relaxation ■ Touring & road trip ■ Sun & beach
 ■ Nature and outdoors ■ Go on a cruise ■ Culture & heritage ■ Culinary or food & wine
 ■ Coast and sea ■ City break

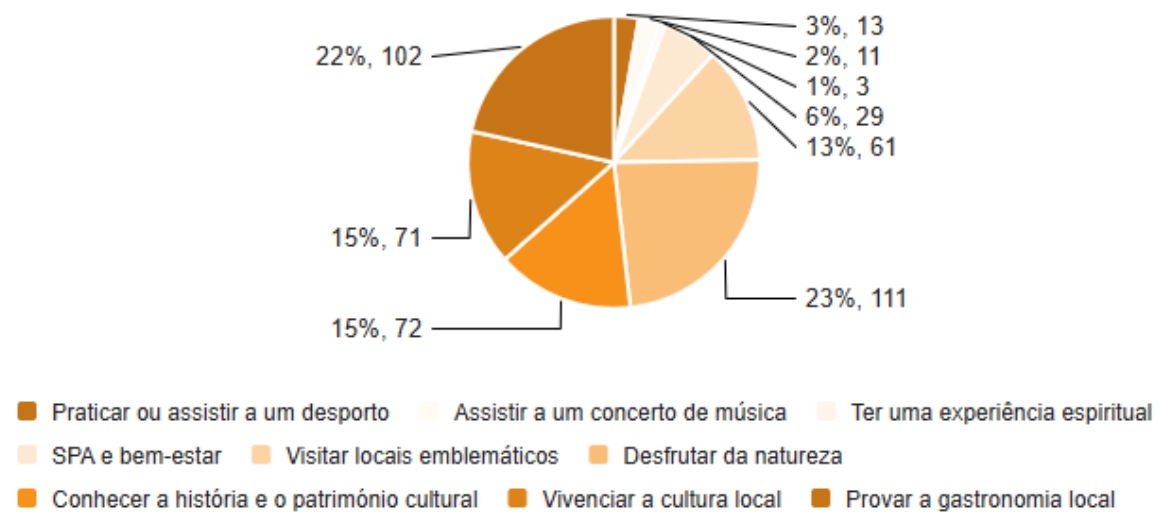
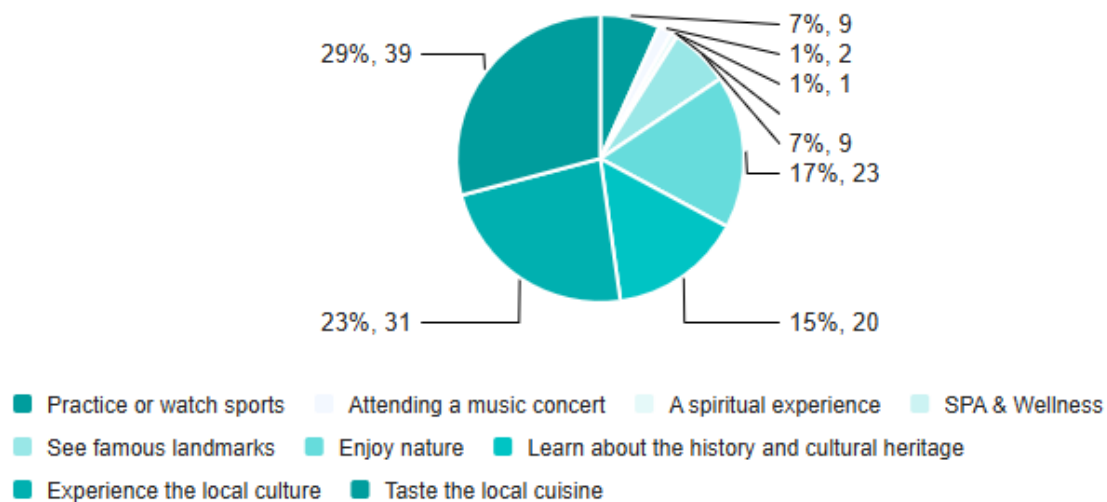


■ Desporto (praticar ou assistir) ■ Bem-estar e relaxamento ■ Circuito ou viagem de carro (road trip)
 ■ Natureza e atividades ao ar livre ■ Cruzeiro ■ Cultura e património ■ Gastronomia e vinhos
 ■ Costa e mar ■ Sol e praia ■ Escapadinha urbana (city break)

Options: Sports (practice or watch); Wellness & relaxation; Touring & road trip; Nature & outdoors; Go on a cruise; Culture & heritage; Culinary or food & wine; Coast & sea; Sun & beach; City break.

Question 14: Which of these activities did you most enjoy during your trip to Portugal? (**Select up to 3 options**)

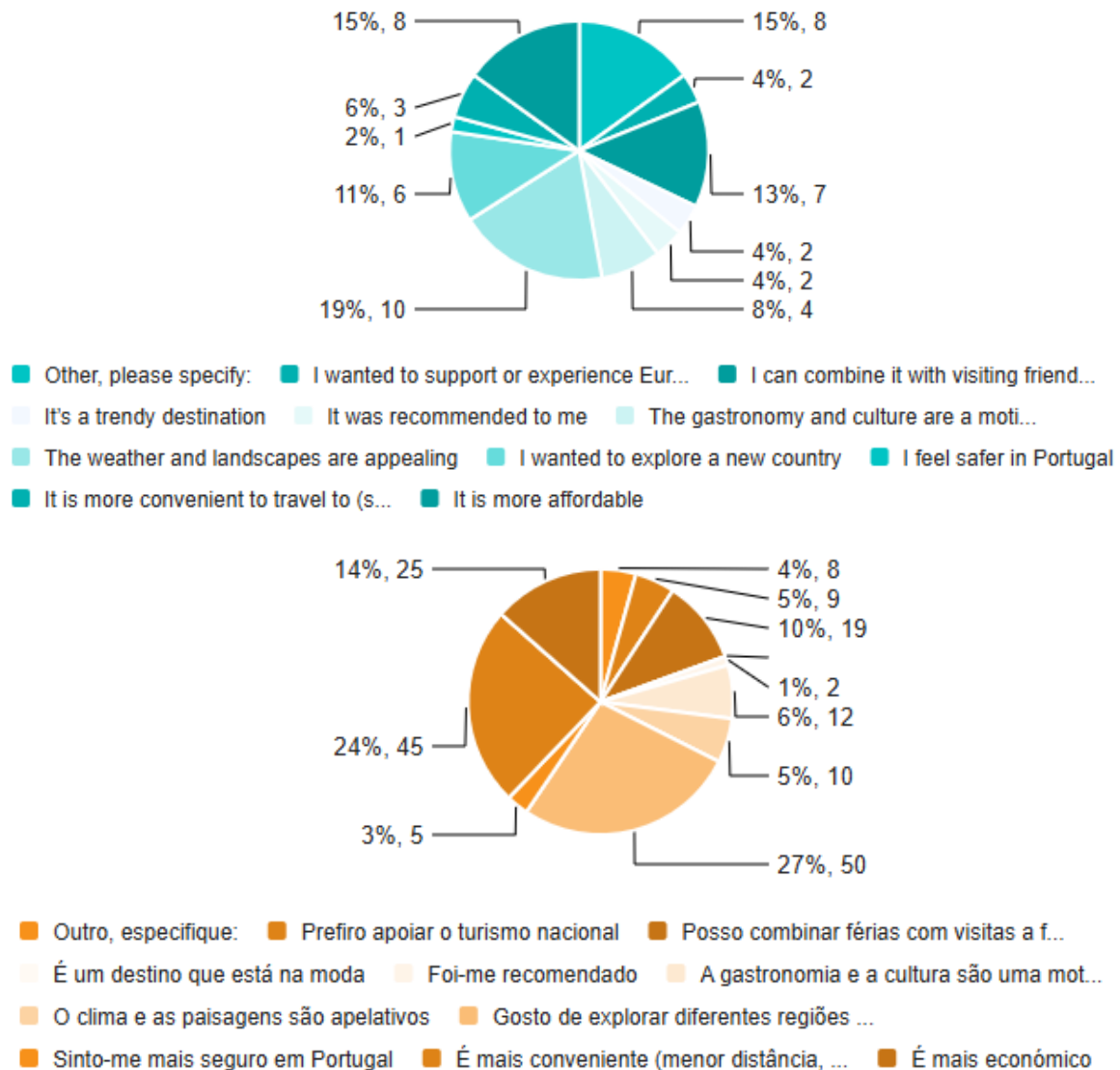
Internationals: N = 134; Domestics: N = 473



Options: Practice or watch sports; Attending a music concert; A spiritual experience; See famous landmarks; Enjoy nature; Learn about history and cultural heritage; Experience the local culture.

Question 15: What is the main reason why you chose to visit Portugal instead of another destination abroad?

Internationals: N = 53; Domestics: N = 185

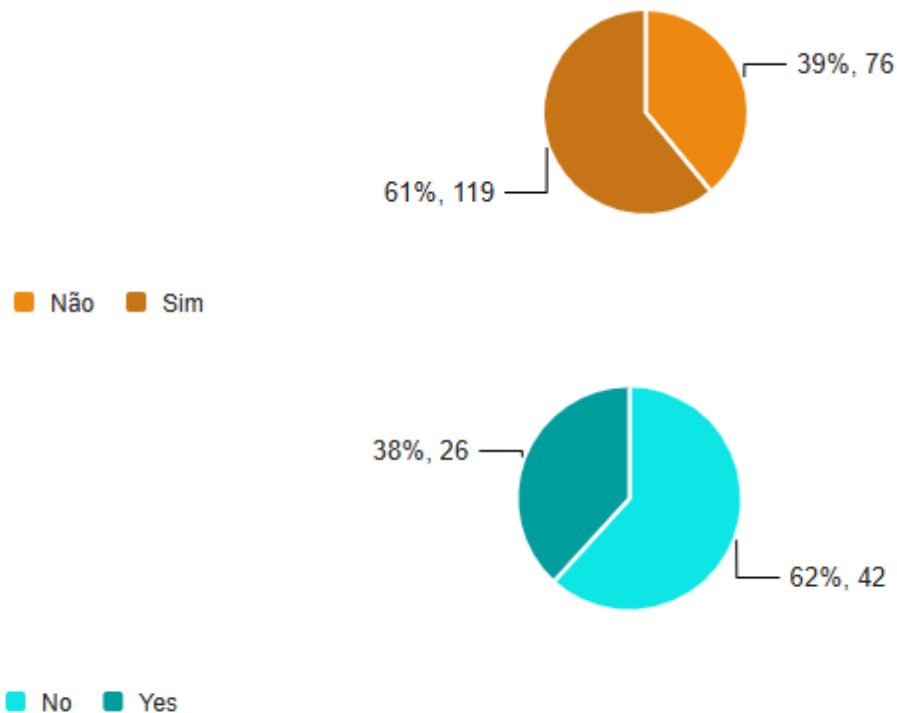


Options: Other, please specify; I prefer to support national tourism; I can combine it with visiting friends or family; It's a trendy destination; It was recommended to me; The gastronomy and culture are a motivation; The weather and landscapes are appealing; I wanted to explore different regions of my country; I feel safer in Portugal; It is more convenient (small distance, ...); It is more affordable.

World Cup Trip

Question 16: Were you aware that Portugal will co-host the FIFA World Cup 2030 with Spain and Morocco?

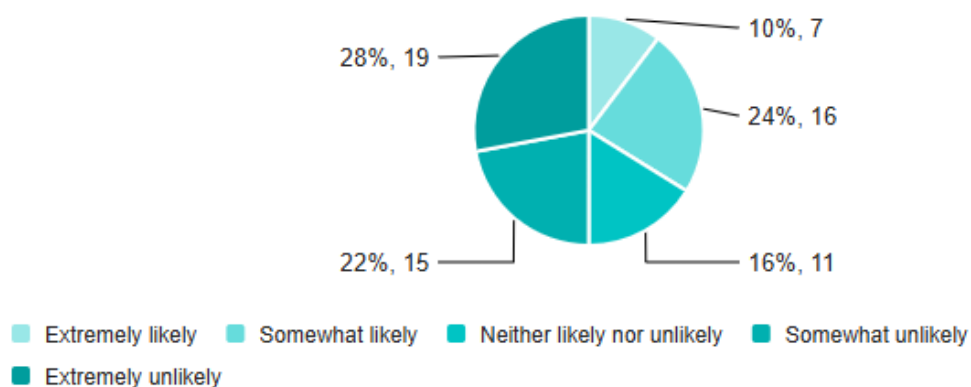
Internationals: N = 68; Domestics: N = 195

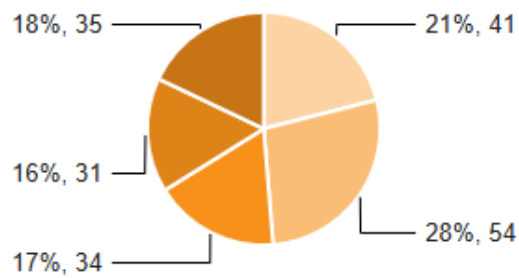


Options: No; Yes.

Filter Question 2 = Question 17: How likely would you be to attend a World Cup match or visit Portugal during the tournament?

International: N = 68; Domestic: N = 195



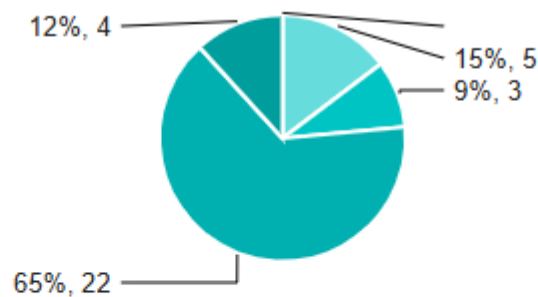


■ Nada provável
 ■ Pouco provável
 ■ Neutro / Não sei
 ■ Provável
 ■ Muito provável

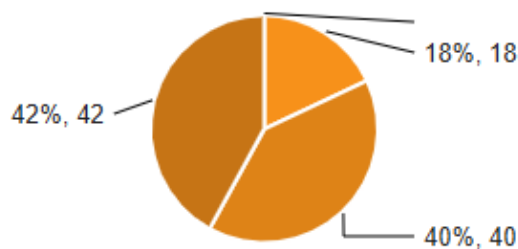
Options: Extremely unlikely; Somewhat unlikely; Neither likely nor unlikely; Somewhat likely; Extremely likely.

Question 18: If you were to attend a FIFA World Cup 2030 match, how would you like to organize your trip? (Select the option that best describes your case)

International: N = 34; Domestic: N = 100



■ Other, please specify:
 ■ I would travel for professional or networking purposes
 ■ I would participate in activities or events related to the World Cup (e.g., f...
 ■ I would combine the trip with holidays or leisure (e.g., beach, culture, gast...
 ■ I would go only to attend the match(es)

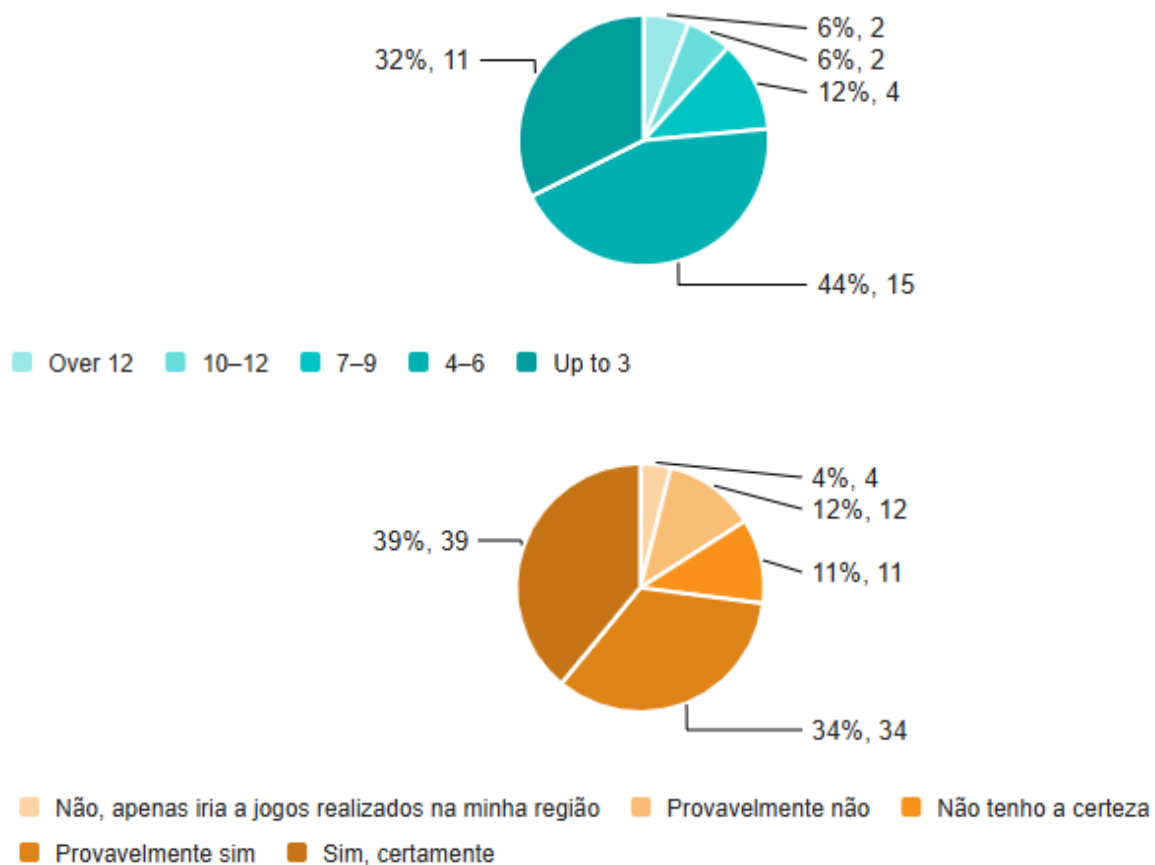


■ Outro, especifique:
 ■ Iria por motivos profissionais
 ■ Participaria em atividades ou eventos relacionados com o Mundial (ex.: fan zo...
 ■ Combinaria a viagem com férias ou lazer (ex.: praia, cultura, gastronomia)
 ■ Iria apenas para assistir ao(s) jogo(s)

Options: Other, please specify; I would travel for professional or networking purposes; I would participate in activities or events related to the World Cup (e.g. fan zones, concerts, ...); I would combine the trip with holidays or leisure (e.g. beach, culture, gastronomy, ...); I would go only to attend the match(es).

Question 19: [EN] How many nights are you likely to stay in Portugal during the World Cup? / [PT] Would you be willing to travel to another Portuguese region to watch a FIFA World Cup 2030 game?

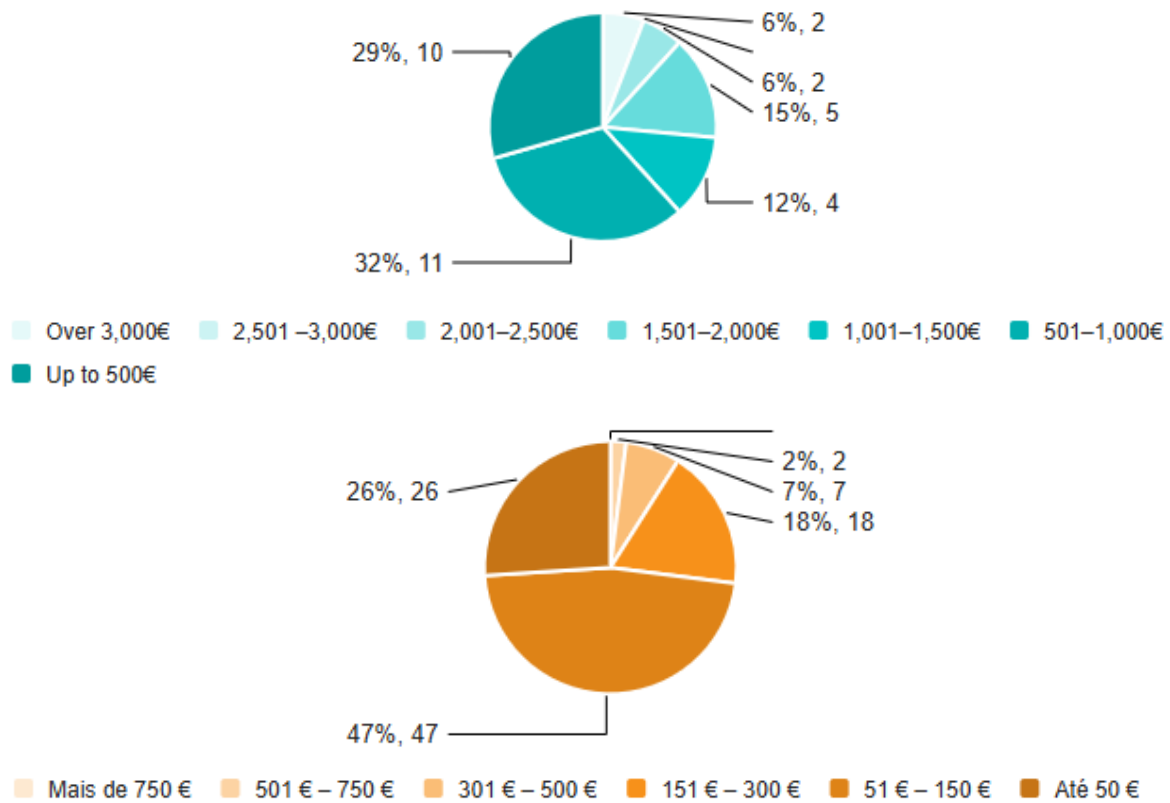
International: N = 34; Domestic: N = 100



Options: No, I would only attend matches in my region; Probably not; Not certain; Probably yes; Yes, certainly.

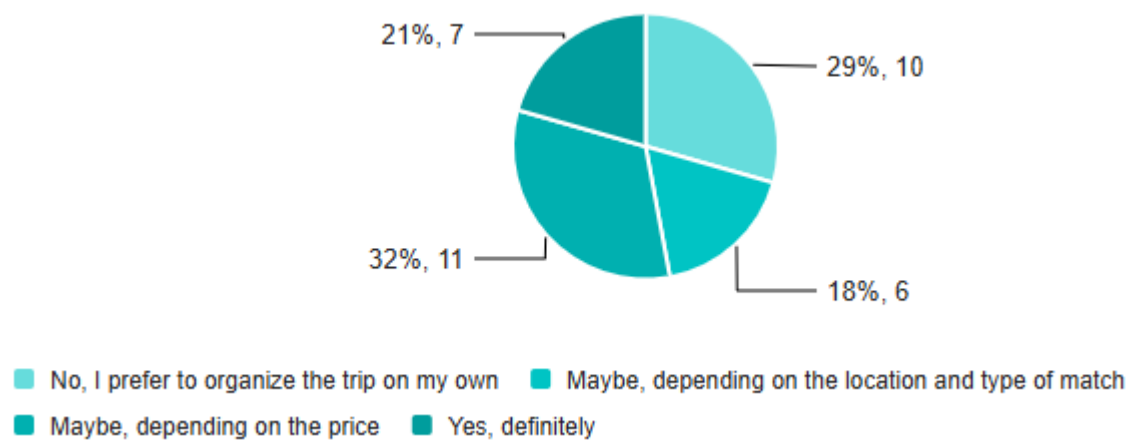
Question 20: How much would you be willing to spend per person on the trip (including accommodation, transportation and activities, excluding match tickets)?

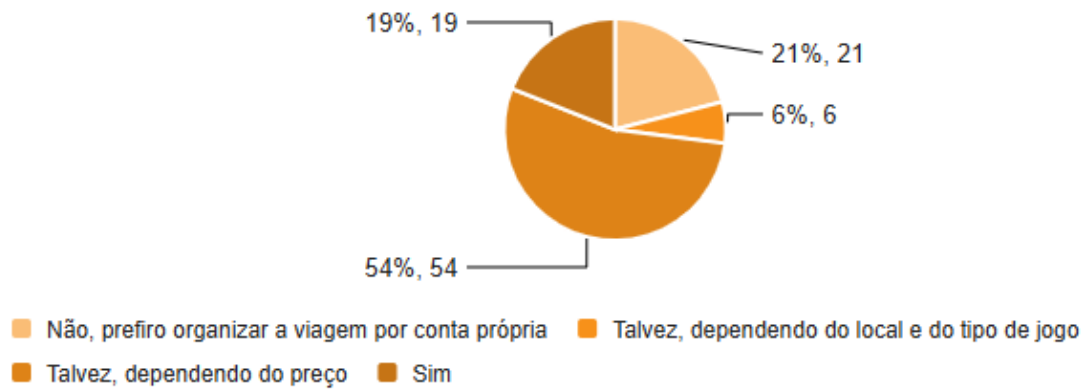
International: N = 34; Domestic: N = 100



Question 22: Would you be interested in purchasing an all-inclusive package that includes a match ticket, accommodation, meals, and transportation?

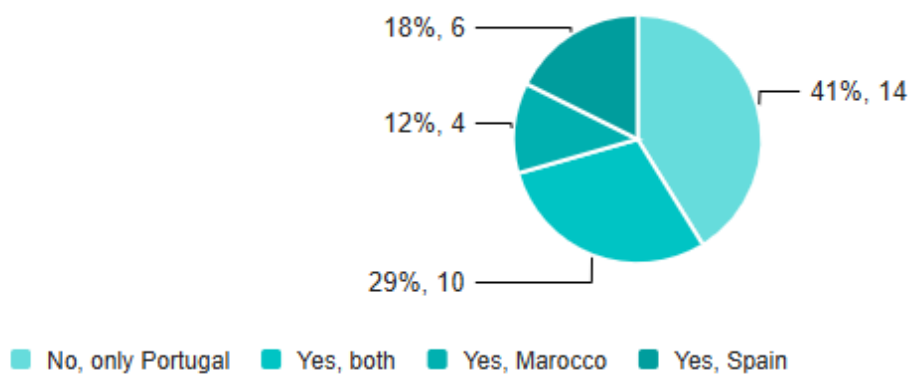
International: N = 34; Domestic: N = 100





Options: No, I prefer to organize the trip on my own; Maybe, depending on the location and type of match; Maybe, depending on the price; Yes, definitely.

Question solely for Internationals: Would you consider combining your World Cup trip with visits to other host countries? N = 34



Question solely for Internationals: What would make you choose Portugal over Spain or Morocco for a World Cup trip? (Please focus only on Portugal as a travel destination, regardless of your national team's participation in the World Cup); N = 34

Note: Here are only represented the meaningful contributions to this question.

- Beautiful country with friendly people, good food and wine
- Lower price
- Local food, culture, people have football in their blood
- The unknown of the country. And because is on my list to visit in the future
- Porto
- Price
- The weather is better, cozy vibe
- The culture
- Is cheaper
- The food

- I've already been to Spain, so I would prefer to visit somewhere new!
- Good food, good weather, easy to get around
- Lisbonne
- I've never been to Portugal
- It's cheaper
- Due to strong positive impression I got about Portugal in my previous visits and having very close Portuguese friends. Also, due to football being a huge sport in Portugal making me believe that the atmosphere will be unbelievable.
- Because Lisbon is nice
- More information about touristic places
- Morocco is cheaper, Spain is more popular
- Good culture
- Because it's a cheaper destination
- I prefer
- Because I feel safer and more comfortable here compared to Morocco, especially as a woman. Also, I have a family connection to Portugal, my father's family is from there
- Safety and gastronomy

Appendix 10 – Cross-tabulations of Variables Used in the Chi-Square Tests

	Length of Stay			
Nationality	Short	Medium	Long	Total
Domestic	80.5% (149)	15.7% (29)	3.8% (7)	100.0% (185)
International	39.6% (21)	17.0% (9)	43.4% (23)	100.0% (53)
Total	71.4% (170)	16.0% (38)	12.6% (30)	100.0% (238)

	Awareness		
Nationality	Aware	Not Aware	Total
Domestic	61.0% (119)	39.0% (76)	100.0% (195)
International	38.2% (26)	61.8% (42)	100.0% (68)
Total	55.1% (145)	44.9% (118)	100.0% (263)

Appendix 11 – Cross-tabulation of travel company x total spendings per person (International Sample)

	Spendings							
Company	Up to 500€	501-1,000€	1,001-1,500€	1,501-2,000€	2,001-2,500€	2,501-3,000€	Over 3,000€	Total
By myself	23.1% (3)	15.4% (2)	23.1% (3)	0.0% (0)	7.7% (1)	0.0% (0)	30.8% (4)	100.0% (13)
Other, please specify:	20.0% (1)	20.0% (1)	40.0% (2)	0.0% (0)	0.0% (0)	20.0% (1)	0.0% (0)	100.0% (5)
With friends	46.7% (7)	40.0% (6)	6.7% (1)	6.7% (1)	0.0% (0)	0.0% (0)	0.0% (0)	100.0% (15)
With my family	23.5% (4)	35.3% (6)	11.8% (2)	11.8% (2)	5.9% (1)	0.0% (0)	11.8% (2)	100.0% (17)
With my partner	33.3% (1)	33.3% (1)	33.3% (1)	0.0% (0)	0.0% (0)	0.0% (0)	0.0% (0)	100.0% (3)
Total	30.2% (16)	30.2% (16)	17.0% (9)	5.7% (3)	3.8% (2)	1.9% (1)	11.3% (6)	100.0% (53)

Appendix 12 – Cross-tabulation of travel company x total spendings per person (Domestic Sample)

	Spendings							
Company	Up to 500€	501-1,000€	1,001-1,500€	1,501-2,000€	2,001-2,500€	2,501-3,000€	Over 3,000€	Total
By myself	100.0% (3)	0.0% (0)	0.0% (0)	0.0% (0)	0.0% (0)	0.0% (0)	0.0% (0)	100.0% (3)
Other, please specify:	100.0% (2)	0.0% (0)	0.0% (0)	0.0% (0)	0.0% (0)	0.0% (0)	0.0% (0)	100.0% (2)
With friends	65.6% (21)	25.0% (8)	3.1% (1)	0.0% (0)	6.3% (2)	0.0% (0)	0.0% (0)	100.0% (32)
With my family	42.5% (45)	32.1% (34)	12.3% (13)	9.4% (10)	0.9% (1)	1.9% (2)	0.9% (1)	100.0% (106)
With my partner	57.1% (24)	33.3% (14)	7.1% (3)	0.0% (0)	2.4% (1)	0.0% (0)	0.0% (0)	100.0% (42)
Total	51.4% (95)	30.3% (56)	9.2% (17)	5.4% (10)	2.2% (4)	1.1% (2)	0.5% (1)	100.0% (185)

Appendix 13 – Carvache-Franco's et al. (2024) Framework

Items	Motivation Category	Description	Practical recommendations
Because soccer is important to me. To enjoy soccer as an art. To attend soccer matches. To be with fans. To join crowds. For fun with friends.	Sports Passion	Tourists love for soccer is the driver. They seek to attend the games, enjoy the artistry of the players, join the lively crowd of fans, and share the experience with friends.	Provide adequate facilities for fans (e.g. dedicated areas in bars of each country with minimal waiting times). Have support staff in the stadiums to assist attendees.
To be excited. To feel good. To forget about problems. To add excitement to my life.	Escape & Relaxation	Tourists seek an escape to temporarily disconnect from daily problems and enjoy themselves, while adding excitement to their life.	Implement tourist packages with exciting activities linked to the sports events. Promote the event internationally highlighting this combination.
For the culture. To get to know Portugal. For patriotism. To be there for the victories and defeats of my team.	Patriotism & Attachment	Tourists experience a deep sense of national pride and identity , and desire to celebrate and support their country on the global soccer stage.	Plan activities for fans to feel enthusiastic regardless of their team's performance (e.g. conduct campaigns encouraging fans to explore the city, its local cuisine, and participate in tourist and leisure activities).
To enjoy the activities and events. For recreation.	Recreation	Tourists seek for entertainment, being drawn to the fun-filled activities and atmosphere of the tournament beyond just the sport and matches.	Incorporate a blend of parties, contests and recreational activities in the host cities (e.g. festivals, full-day excursions to nearby sites, city tours adapted to visitors' needs, etc.)

Appendix 14 – Proposed recommendations in detail (1/4)

Insight	Recommendation	Suggested Actions	Timeframe	Resources	Monitoring & KPIs
A general willingness to purchase event packages was found	Bundling as a viable marketing strategy	Use survey's data to design the best offers for each identified visitor segment	Short-term	<u>HR</u> : product development team	Number of bundles created and activated
			(pre-event)	<u>Financial</u> : operational budget	Sample representativeness across demographic factors
			Preparation: T-2 years (early 2026)	<u>Technological</u> : booking platform integration	Package booking rate
			Launch: 12-18 months pre-event (late 2028)	<u>Partnerships</u> : hotels, cultural venues, online platforms, etc.	Conversion rate of campaign traffic to package sales Average revenue per visitor
To better adapt offers and manage resources, meaningful visitor segments must be identified	Conduct in-depth market segmentation research	Build and distribute a Carvache-Franco et al.-based survey to identify potential visitors' clusters through their main reason for attending the World Cup	Short-term	<u>HR</u> : research team, data analysts, survey specialists	Response rate of survey
			(pre-event)	<u>Financial</u> : research budget	Usage of segmentation results in marketing decisions
			T-3,5 years (Q4 of 2026)	<u>Technological</u> : survey software (e.g. Qualtrics), analytics software (e.g. Jamovi, SPSS)	Average revenue per segment
				<u>Partnerships</u> : coordination with host cities, local operators, FPF and FIFA partners	Accuracy of segment-specific predictions (profiling effectiveness)

Note: 1. Through Turismo de Portugal most recent financial results (2023), the company shows a structural budget that allows to account for the implementation of our proposals. 2. T- stands for time until the event.

Proposed recommendations in detail (2/4)

Insight	Recommendation	Suggested Actions	Timeframe	Resources	Monitoring & KPIs
Intangible legacies need early, formal governance	Establish the Intangible Legacy & Sports Brand Council (IL-SBC)	Form multi-agency council (Turismo de Portugal, IPDJ, FPF, AICEP, ANA, TAP, regions, LOC); define mandate; create monitoring system.	Start T-3 years; operate through event + 18 months post-event	HR: governance staff; administrative / legal support	Meeting frequency
				<u>Financial:</u>	Cross-agency adherence to shared strategy
				<u>Technological:</u> reporting system	Number of surveys conducted
Strong image legacies require unified storytelling and digital access points	Develop and launch Portugal Cup/Trip app + International Sports / Cultural Campaign	Build app/website; integrate itineraries; stadium tours; planning tools; produce mini-docs and global content rollout	T-24 to T-6 months for build + pre-launch; activation starting pre-event, and following up 1 year post event	<u>Partnerships:</u> among top sports organizations in Portugal (Turismo de Portugal, IPDJ, FPF, AICEP, ANA, TAP, regions, LOC)	Publication of annual legacy reports
				HR: app developers; Turismo de Portugal team	App downloads/usage
				<u>Financial:</u> app development costs and paid-media budget	Campaign lobar reach
Strong image legacies require unified storytelling and digital access points	Develop and launch Portugal Cup/Trip app + International Sports / Cultural Campaign	Build app/website; integrate itineraries; stadium tours; planning tools; produce mini-docs and global content rollout	T-24 to T-6 months for build + pre-launch; activation starting pre-event, and following up 1 year post event	<u>Technological:</u> app platform, CRM, analytics, content management	Shifts in destination awareness/search interest
				<u>Partnerships:</u> media partnerships; SMEs and monuments for app development and integration	

Note: 1. Through Turismo de Portugal most recent financial results (2023), the company shows a structural budget that allows to account for the implementation of our proposals. 2. T-stands for time until the event.

Proposed recommendations in detail (3/4)

Insight	Recommendation	Suggested Actions	Timeframe	Resources	Monitoring & KPIs
Emotional attachment drives repeat visitation	Create Fan Engagement Labs and a Return Voucher Programme	Map key touchpoints to install Engagement Labs; embed return vouchers in Portugal CupTrip app	Design: starting T-18 months	<u>HR</u> : UX specialists; installation/tech hardware specialists; event staff	Visitor satisfaction
			Activation: event period	<u>Financial</u> : temporary setups, vouchers, operational staff salaries	Engagement rates in Labs
			Follow-up: up to 12 months post-event	<u>Technological</u> : Interactive installations; QR systems; data capture tools	Voucher uptake
				<u>Partnerships</u> : venues; sponsors; tourism operators; retailers and SMEs; airlines	% of event visitors returning within 1–2 years
Long-term tourism gains depend on strengthened business ecosystems	SME procurement and training platform	Develop connectivity platform; deliver training for travel agencies, hotels, tour operators, sports-tour experience SMEs; integrate SMEs into CupTrip	Platform development: T-24 to T-12	<u>HR</u> : Platform developers; Training providers; Turismo de Portugal coordination team	SME integration rate
			Training: T-12 months onward	<u>Financial</u> : Budget must account for development costs and training providers salaries	Number of SMEs trained
				<u>Technological</u> : CRM system	
				<u>Partnerships</u> : SMEs in Portugal; syndicates	

Note: 1. Through Turismo de Portugal most recent financial results (2023), the company shows a structural budget that allows to account for the implementation of our proposals. 2. T-stands for time until the event.

Proposed recommendations in detail (4/4)

Insight	Recommendation	Suggested Actions	Timeframe	Resources	Monitoring & KPIs
Legacy only materialises when structures are activated over time	Post event activation (marketing and communications campaign in key markets + return vouchers); and visitation tracking	Push personalised invitations, seasonal offers, family-return packages; conduct annual perception surveys	Up to 2 years post event	HR: Turismo de Portugal; CRM/analytics team	
				Financial: post-event campaign budget	Repeat visitation rate
				<u>Technological</u> : marketing automation & survey tools	Changes in sport-brand associations
				Partnerships: tour operators; airlines; and regional tourism boards	Media/search visibility

Note: 1. Through Turismo de Portugal most recent financial results (2023), the company shows a structural budget that allows to account for the implementation of our proposals. 2. T-stands for time until the event.