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# Tourism resilience and recovery in the face of disruptive global events: An international comparison

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**ABSTRACT**

This study explores tourism recovery and resilience in South Africa following COVID-19 amid geopolitical instability and disruptions to global travel. Using a comparative design, it analyses secondary data from government documents, OECD and UNWTO reports, academic literature, and industry sources across South Africa, Zimbabwe, and Portugal. Four dimensions of resilience are examined: policy response, digital transformation, public-private partnerships, and market diversification. Findings reveal distinct resilience pathways, with Portugal displaying transformative resilience through coherent policies and innovation; Zimbabwe exhibits constrained adaptive resilience due to macroeconomic instability and weak institutional capacity; while South Africa shows systemic yet uneven resilience, supported by a domestic tourism base constrained by structural inequalities and limited digital inclusion. It is argued that South Africa requires institutional reform, inclusive digitalisation, and market diversification to achieve transformative resilience. The study's novelty lies in a multi-dimensional comparative framework distinguishing adaptive recovery from transformative systemic change in tourism economies facing disruptions.

**KEYWORDS**

Global disruption; tourism resilience; COVID-19 recovery; South Africa; Zimbabwe; Portugal

## Introduction

The COVID-19 pandemic represented one of the most severe global crises to affect the tourism sector in recent human memory. It resulted in an unprecedented collapse in international mobility and demand. More recently, the outbreak of conflict in the Middle East in March 2026 has again disrupted global international air traffic and tourism markets. Escalating fuel prices and the risks of operating in conflict-affected regions introduced new uncertainties to a sector heavily reliant on international travel. The impacts of the conflict are already evident in shifting global travel patterns, with major aviation hubs such as Dubai and Doha experiencing significant flight disruptions. Though unpredictable, these impacts are likely to intensify should the conflict not be resolved. As with the COVID-19 pandemic, this situation highlights continued vulnerability of tourism to disruptive global events beyond any single destination's control. This uncertainty reinforces the importance of resilience and adaptive recovery in navigating periods of instability. According to the Organisation for Economic Co-operation and Development (OECD), the COVID-19 pandemic caused an unprecedented decline in tourism of more than 70%. This has led to substantial economic losses and widespread job displacement (OECD, 2020). The crisis exposed the vulnerability of tourism systems, particularly those heavily dependent on international arrivals and lacking diversified markets. As a leading tourism destination on the African continent, South Africa experienced a sharp contraction in tourism activity during the pandemic. The sector, which contributes significantly to GDP and employment, was severely affected by travel restrictions and lockdown measures. Despite this upheaval, the country's relatively diversified tourism base, institutional capacity, and robust domestic market provided a degree of resilience (Rogerson & Rogerson, 2021). By contrast, Zimbabwe, a neighbouring country, faced more acute challenges to recovery attributable to pre-existing macroeconomic instability and infrastructure limitations. Portugal, on the other hand, ranked among the top 20 most visited countries globally and demonstrated a

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strong recovery trajectory, surpassing pre-pandemic tourism levels through coordinated policy interventions, digital innovation, and market diversification (OECD, 2024).

Given this background, this study seeks to analyse tourism resilience in South Africa by drawing comparative insights from Zimbabwe and Portugal. Resilience theory serves as a well-suited analytical framework and lens for examining how tourism systems respond to shocks and recover over time. Four key dimensions including policy response, digital transformation, public–private partnerships (PPPs), and market diversification, are investigated. The central argument of this paper is that South Africa's tourism industry has demonstrated marked systemic resilience, positioning it between Zimbabwe's constrained adaptive resilience and Portugal's transformative resilience. Despite notable progress in recovery since 2020, the country continues to confront structural inequalities and institutional constraints that limit its long-term resilience and ultimately its ability to withstand new global disruptions. The study also aims to contribute to scholarly debates on resilience by proposing a comparative, multi-dimensional framework that distinguishes between adaptive recovery and transformative systemic change across diverse national tourism contexts. While existing studies often focus on single-country analyses or short-term recovery dynamics, this study explores how resilience trajectories may be shaped by the interplay among institutional capacity, policy coherence, and structural conditions. By positioning South Africa between Zimbabwe's constrained adaptive resilience and Portugal's transformative trajectory, the study provides a nuanced understanding of how middle-income tourism economies navigate systemic shocks. In doing so, it extends resilience theory by exploring the conditions under which adaptive responses may or may not translate into long-term structural transformation.

## Methodology

This study adopts a qualitative comparative research design, drawing on diverse secondary data sources including government policy documents, OECD and UNWTO reports, peer-reviewed academic literature, and industry analyses published between 2020 and 2025. Sources were selected based on their credibility, relevance to the research dimensions, and representativeness across the three national contexts examined. Where possible and to ensure data reliability, primary institutional reports were prioritised over secondary information sources. This approach enabled a triangulated understanding of tourism recovery and resilience across different national contexts. Through a systematic review of the tourism resilience literature, four dimensions were identified: policy response, digital transformation, public–private partnerships, and market diversification as the key mechanisms through which destinations have responded to and recovered from the COVID-19 disruption (Hall et al., 2018; OECD, 2021; UNWTO, 2022). These dimensions serve as lenses for assessing both adaptive and transformative resilience. South Africa serves as the primary case study, with Zimbabwe and Portugal providing useful contrasting comparative benchmarks. The three cases were selected purposively to represent a spectrum of resilience trajectories across divergent institutional, economic, and geopolitical contexts. For comparison, Portugal was selected as a high-performing, institutionally mature tourism destination with documented transformative recovery, and Zimbabwe as a structurally constrained, low-capacity economy in the same regional context as South Africa. South Africa occupies an intermediate position between these poles. This design facilitates both within-case and cross-case analysis, enabling a deeper interpretation of the structural and institutional factors shaping resilience trajectories. It is acknowledged that reliance on secondary data introduces limitations, including variability in the currency and comparability of national datasets, and potential publication bias in the grey literature consulted. These constraints are mitigated through triangulation across multiple source types and the prioritisation of recent, authoritative institutional reports.

## Literature review

### *Theoretical framework: Resilience theory and tourism*

Resilience theory provides a useful framework for understanding how systems respond to disturbances and adapt to change (Holling, 1973; Folke, 2006). Originating in ecological sciences, the concept was extended to social–ecological systems (Walker et al., 2004) and has since been applied in tourism studies to examine how destinations and stakeholders respond to external shocks (Hall et al., 2018; Rogerson & Rogerson, 2021). According to Cochrane (2010), the resilience concept offers a coherent perspective on the interconnected dynamics of human and environmental systems. It is increasingly recognised as a framework for understanding complex global systems. Initially developed by C. F. 'Buzz' Holling in the early 1970s to model variations in ecological systems, resilience theory was subsequently extended to encompass linked social–ecological systems, with applications across various human-driven contexts, including tourism. Resilience refers to a system's capacity to absorb disturbances and reorganise in the face of change (Espiner et al., 2017; Folke et al., 2010; Walker et al., 2004). In the context of tourism, resilience has gained

recognition as a valuable framework for understanding nature-based tourism and the interrelationships between conservation, communities, and enterprises (Becken, 2013; Biggs, 2011; Lew, 2014; Strickland-Munro et al., 2010). Scholars commonly categorise resilience into two main types: adaptive resilience and planned resilience (Lee et al., 2013; Prayag et al., 2020; Syahribulan et al., 2024). Adaptation is a key component of resilience (Cochrane, 2010; Nelson et al., 2007), which, in the context of tourism-dependent communities and businesses, refers to their ability to renew or reorganise in response to conditions that render previous practices unsustainable. Planned, or proactive, resilience focuses on preparedness, whereas adaptive, or reactive, resilience relates to recovery from disruptions (Sheffi & Rice, 2005). Proactive resilience is implemented in anticipation of crises, while reactive resilience emerges as a retrospective response. Key to proactive resilience is being reliant on effective management, strong networks, collaboration, and lessons drawn from experience (Elshaer & Saad, 2021; Rajput et al., 2020).

Research suggests that post-crisis recovery strategies play a critical role in organisational performance (Corey & Deitch, 2011; Prayag et al., 2020). Conversely, the absence of a supportive recovery plan hinders an enterprise's capacity to adapt and recover (Alexander, 2013). Effective crisis planning, therefore, enhances the utilisation of resources and infrastructure by strengthening resilience in the aftermath of a crisis (Faulkner, 2001). Lee et al. (2013) developed a tool to assess business resilience, differentiating between planned and adaptive resilience, and their findings emphasise the importance of planned resilience as a key determinant of adaptive resilience. Since COVID-19, both proactive and adaptive resilience have become particularly important to tourism businesses. The pandemic not only exposed structural vulnerabilities within the sector but also highlighted the need for proactive measures such as crisis planning, risk assessment, and business continuity strategies. Simultaneously, businesses had to demonstrate adaptive resilience by adjusting rapidly to shifting market conditions, implementing health and safety protocols, adopting digital solutions, and diversifying revenue streams. Studies suggest that a balanced approach, integrating proactive preparedness with adaptive flexibility, offers the most effective pathway to long-term sustainability and competitiveness in an increasingly uncertain global environment (Elshaer & Saad, 2021; Prayag et al., 2020).

***Adaptive recovery versus transformative systemic change***

Given the inherently physical and transport-dependent nature of tourism activities, existing literature acknowledges that tourism was among the industries most severely affected by the COVID-19 pandemic (Al-Azab et al, 2021). The impact on South Africa's tourism sector was particularly severe, with losses across both international and domestic tourism, widespread job displacement, and the suspension of key tourism activities. Notwithstanding these disruptions, the pandemic also catalysed an opportunity to rethink and reshape the sector towards greater resilience, sustainability, and innovation. According to Magangqaza (2025), research on the impact of COVID-19 on tourism in Southern Africa has predominantly focused on national-level consequences. For instance, a systematic review of research on COVID-19 in South African tourism revealed that the majority of studies focused on assessing its impacts (Ilo et al., 2023). Building on this body of work, the present literature review synthesises existing scholarship on the challenges and opportunities for South Africa's tourism recovery and resilience-building in a post-pandemic world. At the global level, research demonstrates that destinations with strong policy coordination, diversified demand structures, and advanced digital infrastructure have recovered more rapidly from disruption (OECD, 2024). However, in the African context, tourism resilience is frequently constrained by economic vulnerability, infrastructure deficits, geopolitical instability, corruption, and a high dependence on international markets (Moyo & Hemmonsbey-Lodewyk, 2026). Within this setting, South Africa has been identified as relatively resilient due to its diversified tourism economy and strong domestic market, which provided an important buffer during periods of disruption (Rogerson & Rogerson, 2021).

Zimbabwe's tourism sector, by contrast, has been characterised by adaptive resilience reflected in efforts to promote domestic tourism and regional markets in response to the crisis (Shereni, 2023). However, persistent macroeconomic instability and limited investment have significantly constrained the pace and depth of recovery. In turn, Portugal represents a contrasting case and a leading example of transformative resilience, wherein coherent policy frameworks, advanced digital innovation, and successful market diversification strategies have enabled rapid and sustained recovery from disruption (OECD, 2024). An important strand of the literature addresses the distinction between short-term crisis response and longer-term transformative change. Brouder (2020) argues that the COVID-19 pandemic presented not merely a crisis to be managed, but an evolutionary opportunity for tourism systems to reconfigure along more sustainable and equitable pathways. This perspective also resonates with Sigala's (2020) contention that the pandemic acted as a structural inflexion point, compelling tourism actors to challenge pre-existing assumptions and engage with transformative innovations instead of reproducing the pre-crisis status quo.

Together, these contributions underscore that the resilience of tourism destinations is not merely a function of recovery speed, but also of the quality and direction of the recovery. This distinction stands central to the comparative framework employed in this study.

Crisis management literature further contextualises these dynamics. Jiang et al. (2019) reviewed over a century of tourism risk, crisis, and disaster management research and concluded that most studies focus on reactive crisis response rather than on the proactive institutional and structural conditions that enable sustained resilience. Their review emphasises the need for more systemic, multi-level analyses that move beyond single-event case studies to examine how resilience is built and maintained across different national and organisational contexts over time. This gap is directly relevant to the present study, which seeks to extend that agenda through a comparative cross-national analysis grounded in secondary evidence. Another dimension of relevance concerns the role of particularly small and medium businesses, which form the backbone of most tourism economies in resilience processes. Jiang et al. (2019) contend that dynamic capabilities, including the ability to sense environmental change, mobilise resources, and transform operational routines, are central to how tourism organisations build resilience in the face of crises. For smaller enterprises, however, the development and deployment of such capabilities is constrained by resource limitations, highlighting the importance of enabling policy environments and institutional support structures. This is particularly relevant in the South African and Zimbabwean contexts, where small, medium, and micro enterprises (SMMEs) constitute a large and structurally vulnerable share of the tourism sector, and where uneven access to resources and institutional support shapes the resilience outcomes of individual businesses and the broader destination system alike.

## Findings and discussion

This comparative analysis conceptualises tourism resilience as comprising two interrelated dimensions: adaptive resilience, the capacity to absorb shocks and restore functionality, and transformative resilience, or the ability to reconfigure systems to address underlying vulnerabilities (Biggs et al., 2012; Folke et al., 2010). Examining South Africa, Zimbabwe, and Portugal through this lens reveals differentiated recovery trajectories shaped by variations in institutional capacity, policy coherence, and structural conditions, which either facilitated adaptive responses or limited the scope for transformative resilience. The figure below visualises these trajectories by mapping adaptive resilience (recovery capacity) against transformative resilience (systemic change capacity) for the three countries under discussion. Portugal demonstrates strong performance across both dimensions, whereas South Africa exhibits moderate adaptive recovery with limited systemic transformation, while Zimbabwe reflects constrained resilience across both dimensions.

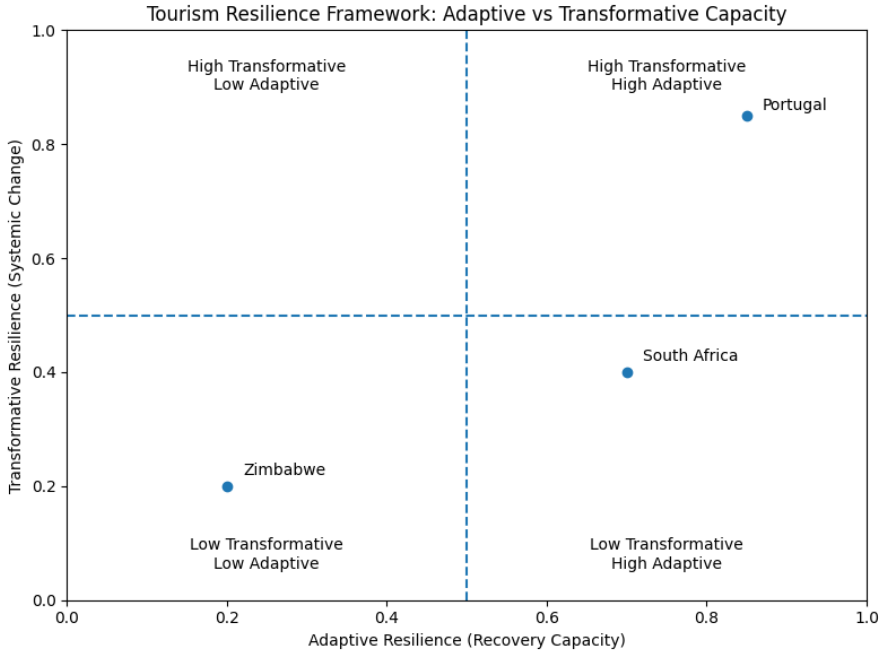


**Figure 1: Comparative tourism resilience framework across South Africa, Zimbabwe, and Portugal**

### *Policy response: From stabilisation to systemic transformation*

Across the three cases, policy responses reveal significant variation in countries' capacity to adopt both adaptive and transformative resilience within their respective tourism sectors. These differences are closely

linked to institutional strength, fiscal capacity, and the degree of policy coordination across governance levels. As crisis response literature acknowledges, effective recovery is dependent on immediate stabilisation measures and the ability to leverage crises as opportunities for structural transformation (Hall et al., 2020; OECD, 2021). Portugal's response reflects a clear shift from short-term stabilisation towards longer-term systemic transformation. Embedded within a multi-level governance framework and strongly supported by the European Union's Recovery and Resilience Facility (RRF), Portugal mobilised substantial financial and institutional resources. The country implemented a suite of public policies to advance sustainable tourism, including the Tourism Strategy 2027, the +Sustainable 20–23 Plan, the Reactivate Tourism Action Plan, and the Plano de Recuperação e Resiliência (PRR). Collectively, these initiatives sought to restore sustainable economic growth following the pandemic while enhancing economic convergence with Europe under the broader Portugal 2030 agenda (Díaz et al., 2024; European Commission, 2021). Despite ongoing implementation challenges, including bureaucratic delays and absorptive capacity constraints, Portugal's overall policy orientation demonstrates a consistent pattern of transformative resilience in which recovery efforts extend beyond stabilisation to actively reconfigure the tourism sector towards more sustainable and competitive pathways (Díaz et al., 2024). South Africa's policy response is more characteristic of adaptive resilience. The government's Tourism Sector Recovery Plan (TSRP) and associated relief measures played a critical role in cushioning the immediate impacts of the pandemic, through financial support mechanisms, health and safety protocols, and targeted interventions for small and medium enterprises (NDT, 2021). For the country, the strategic pivot towards domestic tourism provided an important short-term buffer against the collapse of international travel, reflecting a pragmatic and context-sensitive adaptive response (Rogerson & Rogerson, 2022; SAT, 2023). However, limited fiscal space, governance challenges, and persistent structural inequalities within the tourism economy have constrained the transition from adaptive stabilisation to deeper structural transformation and more rapid recovery (Hall et al., 2020; OECD, 2022; Rogerson & Rogerson, 2022). Consequently, South Africa's recovery trajectory has largely reinforced pre-existing patterns of concentration and exclusion, rather than enabling a fundamental reconfiguration of the tourism system (OECD, 2022).

Zimbabwe presents a more constrained policy environment in which both adaptive and transformative capacities are significantly limited. Pre-existing macroeconomic instability, high inflation, and fiscal constraints undermined the state's ability to implement comprehensive support measures during the crisis (World Bank, 2022). Policy responses were largely reactive, fragmented, and insufficient to stabilise the tourism sector at scale. The absence of coherent long-term policy frameworks and weak institutional coordination further inhibited strategic recovery planning. This aligns with broader findings that countries with fragile economic and governance systems face heightened vulnerability to external shocks and limited capacity for building resilience (Mhlanga & Ndhlovu, 2020; UNWTO, 2022). Consequently, Zimbabwe's tourism sector remains highly exposed to ongoing disruptions, with limited evidence of either adaptive recovery or transformative repositioning. The three cases illustrate a continuum of policy-driven resilience, with Portugal demonstrating the potential for crisis-induced transformation when supported by strong institutions and supranational frameworks. South Africa, on the other hand, reflects an intermediate position in which adaptive measures have been effective in stabilisation but insufficient for systemic change. And by contrast, Zimbabwe highlights the challenges of resilience-building in contexts of structural fragility, where policy responses are constrained to short-term, reactive measures.

***Digital transformation: Uneven pathways to adaptive capacity***

Digital transformation emerged as a critical mechanism for embedding adaptive resilience in the tourism sector, due to restricted mobility and shifting consumer behaviour during and after the COVID-19 pandemic. Digital technology has, over the years, revolutionised global markets by transcending geographical and territorial boundaries. Its adoption offers several benefits, including enhanced competitive advantage, increased market share, improved visitor experiences, and greater brand awareness (Chamboko-Mpotaringa, 2021). Across the three cases, however, the extent and impact of digitalisation varied considerably, reflecting broader disparities in infrastructure, skills, and institutional support. As highlighted in the literature, digital technologies not only facilitate short-term adaptation through virtual engagement, contactless services, and online marketing, but can also underpin longer-term structural transformation when effectively embedded within tourism systems (OECD, 2021; UNWTO, 2022). In Portugal, digital transformation was both rapid and strategically aligned with broader recovery objectives (Díaz et al., 2024). Accelerated adoption of digital tools enhanced destination management capabilities, improved market access, and increased operational flexibility across the tourism value chain. This was particularly important in an economy largely characterised by micro-enterprises concentrated within traditional sectors (European Commission, 2021). Initiatives linked to the national recovery framework and EU support mechanisms also promoted smart tourism ecosystems, data-driven decision-making, and platform-based service delivery (European

Commission, 2021). This integration of digitalisation into policy and practice suggests a shift beyond immediate adaptation towards transformative resilience, wherein digital innovation becomes a structural feature of the sector's long-term competitiveness and sustainability (Díaz et al., 2024; Gretzel et al., 2020). South Africa's experience reflects a more uneven and partial trajectory of digital adaptation. While larger and well-capitalised tourism enterprises have been able to leverage digital platforms for marketing, bookings, and customer engagement, many small, medium, and micro enterprises (SMMEs) continue to face persistent structural barriers. These include limited digital literacy, inadequate ICT infrastructure and connectivity, and the high costs associated with adopting new technology (Chamboko-Mpotaringa et al., 2025; Sifolo, 2025). As a result, digital transformation contributed to sectoral resilience in aggregate terms but also reinforced existing structural inequalities within the tourism economy. This uneven uptake constrained the broader transformative potential of digitalisation, highlighting the importance of inclusive digital policies and targeted support mechanisms to bridge the digital divide (OECD, 2022).

In Zimbabwe, digital transformation remained limited and largely peripheral to tourism sector recovery efforts. Structural constraints, including inadequate ICT infrastructure, unreliable connectivity, high data costs, foreign currency shortages, and broader macroeconomic instability, significantly curtailed the adoption and effective use of digital technologies (Mafukidze & Chiutsi, 2025; Mweha, 2025). As a consequence, tourism enterprises were less able to pivot to online platforms or adopt digital tools to sustain operations during periods of restricted travel. This limited digital uptake not only reduced the sector's adaptive capacity but also underscored the critical role of foundational investments in enabling technologies and supportive policy environments. Without sustained investment in Zimbabwe, the potential of digitalisation to drive resilience remains largely unrealised (UNCTAD, 2021). Portugal illustrates how coordinated investment and policy alignment can leverage digitalisation for transformative outcomes. South Africa occupies an intermediate position in which digital tools support adaptation but are unevenly distributed and limit systemic impact. Zimbabwe, by contrast, highlights the constraints faced by economies with limited digital readiness, where the absence of enabling conditions restricts both adaptive and transformative resilience.

***Public–private partnerships: Institutional depth and coordinated action***

Public–private partnerships (PPPs) provide an important lens through which to assess institutional depth, governance capacity, and the ability of tourism systems to coordinate effective responses to crisis. The literature emphasises that well-functioning PPPs can enhance both adaptive and transformative resilience by fostering collaboration, pooling resources, and aligning public policy objectives with private sector innovation and operational capacity (Dredge & Jamal, 2015; Hall, 2011; OECD, 2020). Across the three cases, however, the nature and effectiveness of PPPs vary considerably, reflecting broader differences in institutional maturity and state–market relations. Portugal's experience demonstrates the value of relatively mature and institutionalised PPP frameworks. Long-standing collaboration among government, regional tourism bodies, and private sector stakeholders enabled a coordinated and coherent response to the COVID-19 crisis (Ferreira et al., 2025; OECD, 2022; OECD, 2024). These partnerships were not only instrumental in crisis management, including implementing health protocols and restoring traveller confidence, but also in advancing strategic priorities linked to sustainability, digitalisation, and product diversification (European Commission, 2021). The integration of PPPs within broader national and EU-level policy frameworks facilitated alignment across actors and spheres of government, thereby supporting a transition from recovery to systemic reconfiguration (European Commission, 2022; OECD, 2024). In this sense, PPPs served as governance mechanisms to reshape institutional arrangements and sectoral trajectories, consistent with broader concepts of adaptive and collaborative tourism governance (Bramwell & Lane, 2011). In South Africa, PPPs played a meaningful but more limited role in supporting tourism recovery. Collaboration between public entities and private stakeholders was particularly evident in destination marketing and promotional campaigns, including efforts led by South African Tourism to stimulate domestic demand and rebuild international visibility (OECD, 2022; SAT, 2023; Viljoen & Maphosho, 2023). However, tourism governance in South Africa has been constrained by fragmented institutional arrangements, uneven capacity across spheres of government, and difficulties in sustaining coordinated action across stakeholders during the COVID-19 response (Rogerson & Rogerson, 2020). These structural constraints limit the extent to which PPPs can function as fully integrated governance instruments, rather than episodic or campaign-based collaborations. From a theoretical perspective, this pattern aligns with broader critiques of collaborative governance in tourism. While PPP-type arrangements can strengthen adaptive resilience by improving coordination, information sharing, and crisis responsiveness, they are generally less effective in producing transformative resilience, which requires deeper institutional restructuring and shifts in underlying governance relations (Bramwell & Lane, 2011; Dredge & Jamal, 2015; Hall, 2011). In South Africa’s case,

PPPs have largely supported incremental recovery rather than enabling fundamental restructuring of the tourism system.

Zimbabwe's PPP landscape, by contrast, remains largely informal, fragmented, and reactive. In the absence of strong institutional frameworks and consistent policy support, private sector actors have often assumed a leading role in sustaining tourism operations under highly constrained conditions (Mhlanga & Ndhlovu, 2020). While this underscores the resilience and adaptability of individual tourism enterprises, the lack of structured and institutionalised partnerships has limited opportunities for coordinated action and collective recovery. Weak governance capacity, policy uncertainty, and resource constraints further inhibit the development of effective PPPs as mechanisms for resilience-building (World Bank, 2022). Consequently, partnerships in Zimbabwe have had limited impact beyond short-term survival strategies. The effectiveness of PPPs as resilience mechanisms is closely tied to institutional depth, governance coherence, and enabling policy environments. Portugal illustrates how well-developed partnerships can facilitate both coordinated crisis response and long-term sectoral transformation. South Africa reflects an intermediate position in which PPPs support adaptation but are constrained by systemic governance challenges, and Zimbabwe, in turn, highlights the limitations of informal and weakly institutionalised partnerships in contexts of broader structural fragility.

***Market diversification: Buffering shocks and enabling reorientation***

Market diversification emerged as a central pillar of tourism resilience during the COVID-19 crisis, supporting tourism businesses and destinations with buffering immediate demand shocks and adapting to rapidly changing travel conditions, while also providing pathways for recovery through the development of new source markets and demand segments (Fernando & Ratnayake, 2024; Matijević et al., 2025; Sigala, 2020). The literature underscores that diversified tourism markets, across both domestic and international segments, support institutional resilience by reducing dependence on single-source markets and increasing flexibility in response to external shocks (OECD, 2022; UNWTO, 2023). Across the three country cases, however, the structure and effectiveness of diversification strategies varied considerably, reflecting differences in market composition, economic capacity, and global integration. Domestic tourism played a critical stabilising role in South Africa during periods of restricted international travel. With international arrivals severely restricted, the domestic market provided an essential buffer, sustaining limited demand and enabling partial sectoral recovery (Rogerson & Rogerson, 2022; SAT, 2022). Government and industry campaigns to stimulate local travel, as well as price adjustments and product repositioning, supported this shift. However, domestic tourism was insufficient to fully offset the loss of high-value international arrivals. Evidence shows that domestic tourism, while resilient, generates significantly lower per-visitor expenditure due to domestic income constraints, and that international tourism remains the primary driver of foreign exchange earnings and sectoral recovery (OECD, 2024; Rogerson & Rogerson, 2021). Portugal's experience illustrates the advantages of a well-diversified and globally integrated tourism market. While domestic tourism provided an important short-term cushion during the height of travel restrictions, the country's recovery was primarily driven by its ability to rapidly re-engage multiple international source markets once borders reopened (European Travel Commission, 2022; UNWTO, 2023). Portugal's strong positioning in European and long-haul markets, combined with effective marketing and favourable perceptions of safety and quality, enabled a swift rebound in international arrivals (OECD, 2024). This capacity to pivot across markets reflects both adaptive resilience, through short-term demand substitution, and deeper structural competitiveness, which supports longer-term recovery and growth (Gössling et al., 2021).

Zimbabwe, by contrast, faces significant structural constraints in achieving effective market diversification. Limited domestic purchasing power limits the potential for internal demand to act as a meaningful buffer during crises, while reliance on a narrow set of international markets increases exposure to external shocks (Mhlanga & Ndhlovu, 2020; World Bank, 2022). Challenges related to destination competitiveness, connectivity, and international perceptions further constrain diversification efforts. The absence of a broad and resilient demand base undermines both adaptive capacities, by limiting short-term recovery options, and transformative potential, as the sector remains structurally vulnerable to future disruptions (UNWTO, 2022). South Africa shows the importance of domestic tourism as a shock absorber, albeit with clear limitations, while Portugal exemplifies the benefits of diversified and competitive international market engagements which enable both rapid recovery and longer-term resilience. Zimbabwe, by contrast, illustrates how constrained and concentrated market structures can exacerbate vulnerability and inhibit recovery across both dimensions.

***Synthesis: Resilience as context-dependent and multi-dimensional***

The comparative analysis demonstrates that tourism resilience is neither uniform nor linear but rather emerges from the interaction among multiple structural and institutional dimensions. Across the three cases,

resilience is shaped by the degree of alignment between policy frameworks, digital capabilities, governance arrangements, and market structures. Portugal's trajectory illustrates how strong institutional capacity, coordinated governance, and access to supranational resources enable a shift from adaptive recovery to transformative change. South Africa reflects a hybrid model in which adaptive resilience mechanisms, such as domestic tourism mobilisation and policy support, have been effective in stabilisation but insufficient to fully compensate for the loss of international visitors or to drive systemic transformation. Zimbabwe's case highlights the constraints faced by low-capacity systems, where structural vulnerabilities limit both adaptive recovery and transformative potential. Of note is the finding that resilience in the face of global disruptive events such as COVID-19 and conflict in the Middle East is not solely due to the scale of interventions, but rather to their coherence and integration. Adaptive strategies, while essential for short-term recovery, do not necessarily translate into long-term resilience unless accompanied by broader structural reforms and strategic alignment. This underscores the need to conceptualise tourism resilience as a dynamic and multi-dimensional process rather than a static outcome.

## Conclusion

This study has demonstrated that tourism resilience extends beyond short-term recovery to encompass the capacity for longer-term systemic change. Through a comparative analysis of South Africa, Zimbabwe, and Portugal, the findings reveal distinct resilience pathways shaped by differences in institutional capacity, governance coherence, and broader structural conditions. Portugal's experience illustrates how crises can be leveraged as opportunities for transformation when recovery efforts are closely aligned with long-term strategic objectives and supported by coherent policy frameworks. Zimbabwe's case, by contrast, highlights the difficulties of resilience-building in contexts of structural fragility, where constrained resources, economic instability, and weak institutional capacity limit both adaptive recovery and transformative change. South Africa occupies an intermediate position, characterised by a degree of systemic resilience that has supported sectoral stabilisation, yet remains uneven and constrained by persistent structural challenges. The study contributes to the tourism resilience literature by reinforcing the argument that adaptive recovery, while necessary, is insufficient to secure long-term sustainability during global disruptive events. The findings underscore the importance of coordinated policy action, inclusive digital transformation, and diversified market strategies in strengthening resilience within tourism systems. From a practical perspective, the study proposes that policy responses to future shocks, such as the ongoing turmoil in the Middle East, should move beyond short-term crisis management towards more integrated and forward-looking approaches that address underlying economic and institutional constraints. Future research could build on this analysis through longitudinal studies and closer examination of institutional-level resilience strategies, particularly within emerging economies where structural vulnerabilities continue to shape tourism development trajectories.

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