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Article

Second Homes and Potential Impacts on Rural Tourism Businesses Development

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Abstract: This study suggests that second homes self-building by Portuguese emigrants in places of origin may encourage the return and tourism businesses development in rural areas in Portugal. These second homes resulted from the great wave of emigration that occurred between mid-1950s and mid-1970s and the connection of emigrants to its roots. Since those territories are socially depressed, with only populations of up to 2000 inhabitants, tourism can be a driving force for economic activity thanks to its cross-cutting economic and social dimensions and the high ratio of micro, small and medium-sized enterprises operating directly or indirectly along the tourism value chain". The owner-builders of second homes still have preserved the rural organization of the houses and most of them also have other cultivated lands scattered through the village that are maintained when in Portugal for holidays. Therefore, 5,157 Portuguese emigrants were surveyed through the application of a questionnaire to assess the impact of their return on tourism development. Results show that the new generation of Portuguese emigrants (of the working age) consider second homes of the owner-builders their cultural legacy (from family) and can encourage them to return and rent accommodation units in there (if with financial benefits).

Keywords: second homes; return migration; tourism businesses development; rural areas; Portugal

1. Introduction

The identity debate has increased in intensity since the emergence of the phenomenon of globalization. In relation to emigrants, they are often forced to assimilate a dominant national culture and their identity can become hybrid. However, when considering the case of Portuguese emigrants, especially between 1970 and 1990, it is possible to adhere to transnational practices without questioning belonging to a nation-place considering their intention to maintain their cultural difference from the culture of the host country. One way they manifested their symbolic commitment to Portugal was through the phenomenon of the owner-builders of second homes in their place of origin. The diversity of interventions has made it impossible identify *habitat styles* and evidence strategies of distinction, based on Portuguese emigrants' biographies which are, therefore, differentiated from each other. Until the publication of the law that started to regulate professional qualifications required of technicians responsible for construction projects (no. 31/2009, of 3rd July), the phenomenon of the owner-builders of second homes become evident in rural landscapes of Portugal even if places of absence during most part of the year. The places of origin of Portuguese emigrants continue to face various crises, mainly due to the inability to create employment and income opportunities. In this regard, the tourism sector, under certain conditions, can be a driving force for economic activity in general, helping to reduce regional development asymmetries and improve the quality of life of populations living in rural areas.

Another characteristic of those second homes is its rural organization—with a vegetable garden, orchard and trellises on the sides and back of the house that Portuguese emigrants maintain when in Portugal. Most of them also have other cultivated lands scattered through the village. Since globalization imposes challenges to hospitality industry, due to the rise of cultural diversity,

authenticity and engagement are also critical variables in hospitality experiences to offer a competitive advantage (Rosado-Pinto and Loureiro, 2023). In this sense, the second homes of the owner-builders in Portugal might encourage the return of the new generation of Portuguese emigrants (of the working age) and the development of rural tourism businesses in their places of origin. Thus, this study begins by explaining the emergence of this phenomenon and its potential impacts on rural tourism businesses development in Portugal. The methodology, results and discussion of the study will be topics also covered. The main conclusions and directions for future studies are put forward in the final section.

2. The Emergence of the Phenomenon of the Owner-Builders of Second Homes in Portugal

The great wave of Portuguese emigration took place between the mid-1950s and the mid-1970s and was linked to post-war European economic growth, in an essentially intra-European process of massive transfer of labour from the peripheral south to the industrialised north, in which Portugal was substantially involved (Barreto and Mónica, 1999). The various studies published in Portugal cite the lack of jobs and salaries that would provide a more dignified and secure future as the main reason for the evolution of the phenomenon that led to the exodus of isolated emigrants and entire families (see e.g., Rocha-Trindade, 1976; Ferrão, 1996; Portela and Nobre, 2001). The causes of emigration to the former colonies, which occurred in the same period, point in the same direction (Peralta, 2019). Portuguese emigration, however, did not end in 1973-1974, and it increased in the late 1980s and early 1990s (Ferrão, 1996). But the 1990s were clearly marked by a progressive reduction in estimated flows and especially by the affirmation of a logic of temporary emigration, involving long-distance and wide-ranging forms of “commuting” with some EU countries (Ferrão, 1996). With the proximity of the countries and the ease of travel, emigrants never completely severed the umbilical cord with their country of origin. In this scope, various authors state that the most evident way in which Portuguese emigrants affirmed their material and symbolic commitment to Portugal was through a common project to build a second home there, revealing the extent to which they were linked to their origins (see e.g., Silva et al., 1984; Amaro, 1985; Lewis and Williams, 1986; Rocha-Trindade, 1986; Leite, 1989; Portela and Nobre, 2001; Villanova, 2006/7).

Most Portuguese emigrants opted to build a new house themselves in the place of origin, rather than undertaking a renovation project, mainly as a strategy of differentiation from the past, because of their improved socioeconomic condition and the individual features reflected in the transformations of their own taste (Villanova, 1994:15; 2006/7): (...) “the new houses of Portuguese emigrants have offered, since the mid-1960s, the new repertoire of vernacular habitat: interior comfort, variety of materials and bright colours. Of very uniform design, they exhibit their fantasies at the level of the facades: combinations of different models of tiles, paintings of violent colours, staircases in volutes, balconies along the entire façade, mansard roofs, walls that define monumental chimneys, roofs that multiply” (Villanova et al., 1994:15). The owner-builders of second homes still have preserved the rural organization of the houses in the region—with a vegetable garden, orchard and trellises on the sides and back of the house that are maintained when in Portugal for holidays, and uses construction materials from other countries (Leite, 1989; Villanova et al., 1994). Most of them also have other cultivated lands scattered through the village (Villanova et al., 1994). Despite local pressure exerted on the constructions of emigrants and their awareness of the local heritage, only in very exceptional cases was it possible to change the details of those projects to fit in with local architecture (Leite, 1989; Neves, 2016). This is because, in many municipalities, the only agents promoting construction were emigrants and the prohibitions could not exceed the agents’ capacity for acceptance (Leite, 1989). It was only with the publication of the Law no. 31/2009, of 3rd July, that professional qualifications required of technicians responsible for drawing up, signing and supervising projects have been established. Although second homes built by Portuguese emigrants in the place of origin continue to appear places of absence, its potential effects on the return of

Portuguese emigrants of the working age and the development of rural tourism businesses in the place of origin will be topics covered in the following section.

3. The Potential Impacts of Second Homes of the Owner-Builders on Rural Tourism Businesses Development

The expansion of second homes in Portugal has had some special features that are strongly related to emigration (especially between 1960-1974) and out-migration (between 1960-1973) and the consequent depopulation of many rural areas where, apart from new housing construction, the emigrants' and out-migrants' first homes were frequently converted into second homes (Cavaco, 2006; Santos and Costa, 2009; Neves, 2016; Oliveira et al., 2015; 2023; Santos, 2021). Studies carried out in Portugal also show that the main reasons for Portuguese emigrants to purchase or construct second homes, in the place of origin or in large cities or close to them, are related with holidays, retirement and/or savings investment (see e.g., Mendonsa, 1982, cited by Williams and Hall, 2000; Cavaco, 2003; 2006; Roca e Oliveira, 2011, cited by Oliveira et al., 2023; Oliveira et al., 2015). According with Gallent (2014: 174) analysis of the impacts of second home ownership in rural areas, around the world, regularly align with a "loss of community" thesis, linking second homes to a range of negative socio-economic consequences (see also Müller and Hall, 2018). During the 1970s, this debate was primarily focused on rural areas wherein second homes were sometimes seen as contributing to the development of elite landscapes (Hall and Müller, 2004; Müller and Hall, 2018). Regarding this topic, the second homes in consideration in this study already exist in rural landscapes of Portugal, having been self-built, until the publication of the Law no. 31/2009, by Portuguese emigrants in their places of origin (see section 2). Moreover, while Portuguese emigrants are also locals, their nostalgia and place attachment are to what is observed in permanent residents (see also Adie and de Bernardi, 2020).

On the other hand, Müller and Hall (2018:3) argue that it is the combination of factors that influences to what extent second homes are seen as a "curse or blessing" and whether second home tourism is seen as a challenge or opportunity. In this scope, Afonso Pérez et al. (2022) also argue that different economic impacts can occur in tourism destinations with a strong presence of second homes compared to resorts and hotel destinations, whereas in rural communities—where the population decrease, second homes can become an important economic contributor. Despite second homes having been studied from the point of view of changing landscapes and lifestyle (Oliveira et al., 2015), studies have also evidenced that its beneficial economic effects in Portugal generally outweigh some negative ones for the local economy, due to its contribution to the generation of income for the local population, government accounts and reduction of seasonality, (Oliveira et al., 2015). Müller (2004) also stands out that the owners of second homes, including foreigners, consume as much or more local products and services than permanent residents, so that this demand for agricultural products by temporary residents may cause price inflation, which may affect the purchasing power of the local population. However, according with the official body of Portuguese Institute of Statistics in Portugal rural areas have populations of up to 2000 inhabitants. This is mainly due to its context of unemployment, remoteness from markets and services, emigration, decline and aging of the population (see e.g., Cavaco, 2003; Figueiredo, 2003; Labrianidis et al., 2003). In this regard, this study suggests that second homes self-building by Portuguese emigrants in their places of origin can encourage rural tourism businesses development in their places of origin. Additionally, their enjoyment and habit for the practice of traditional agriculture for self-consumption—in the second home and other lands they own scattered in the place of origin (see e.g., Cavaco, 2003; Villanova et al., 1994; 2006/7), can also have a positive effect on the maintenance of traditional agriculture landscape and as a complementary activity to increase their disposable income (Santos, 2021).

According to the Council of European Union (2022:3) "the tourism sector significantly contributes to economic development across Europe and can help to achieve the objectives of various EU, national, regional and local policies thanks to its cross-cutting economic and social dimensions and the high ratio of micro, small and medium-sized enterprises operating directly or indirectly along the

tourism value chain". Therefore, the tourism sector can help to reduce existing development asymmetries and improve the quality of life of local population (see also e.g., Fleischer and Felsenstein, 2000; Mahony and Zyl, 2002; Chen and Yang, 2010; Hyojin and Byung-Gook, 2015; Crompton et al., 2016; Kim and Miller, 2017; Rusic and Demonja, 2017; Ferrari et al., 2018; Tohmo, 2018; Cannonier, C. and Burke, M., 2019). In this regard, research shows that return migration can contribute to rural tourism development in Portugal. Specifically, Portuguese emigrants of the working age and with a second home in the place of origin (or rural area) would like to return, invest (especially in self-employed secondary residence services), have a job in the tourism sector and a rural lifestyle, more financial capital, as well as more knowledge and professional experience in tourism and/or hospitality sectors acquired while settled abroad (see Santos, 2021). The same emigrants would like to monitor their own working hours to reconcile tourism with agriculture, mainly for self-consumption, since the second home of the place of origin has vegetable gardens and/or other farmland scattered throughout the village, where they generally use simple techniques and do not employ insecticides (Santos, 2021). Additionally, their return can also encourage tourism demand in rural areas of Portugal, particularly in rural and local accommodations types (see Santos and Freitas, 2023).

Moreover, considering Portuguese emigrants of the working age willingness to invest especially in self-employed secondary residence services in the place of origin, this study also suggests these emigrants may have greater propensity to rent accommodation units in the second home of their family in the place of origin and encourage the development of rural tourism businesses in Portugal. Pers et al. (2018) argue that there can be strong emotional bonds between people and the properties where earlier generations have farmed and lived. Other authors also mention that the younger age of homeowners (Bieger et al., 2007), as well as the financial benefits—namely special property taxes combined with financial reimbursement and the granting of their maintenance without cost or inconvenience to the owner (Beritelli et al., 2008), positively influence their propensity to rent out their properties for the opportunity of income. Therefore, this study also suggests that the second homes of the owner-builders may also encourage the desire of Portuguese emigrants (of the working age) to return and not just their consumption patterns, so that they can be the hospitality promoters.

4. Research Design and Methods

The discussion conducted in sections 2-3 suggests that the second homes of the owner-builders in the place of origin of Portuguese emigrants might possibly encourage rural tourism businesses development by Portuguese emigrants (of the working age) in socially depressed areas in Portugal. Therefore, the following objectives have been defined for this study:

- a. To assess if Portuguese emigrants of the working age intend to rent for tourism purposes the second home in the place of origin, which they equally consider to be their Portuguese cultural legacy from family.
- b. To assess whether second homes of the owner-builders are likely to influence the new generation of Portuguese emigrant's desire to return in view of a future rural tourism businesses development in their place of origin.

Because official data on the number and characteristics of Portuguese emigrants around the world is not available, the goal has been to obtain relevant information from as many Portuguese emigrants as possible, leading to the option of an unrestricted sample. For the preparation of the questionnaire, nominal scales, checklists, and ratio scales were used. The data collection process started on 1 July 2011 and ended on 31 October of the same year, with a total of 5157 completed and valid questionnaires. From 1 July until 31 October the questionnaire was carried out by mail and internet. Initially, 4000 questionnaires were sent to households of Portuguese emigrants in the host countries, 54 were returned and only 9.32% were responded to. Through the identification of local publications associated with the municipalities with more second homes, listings with the full names and contacts of their subscribers were obtained. In this way, the addresses of emigrants in the host

countries could be identified. By 31 July, the questionnaire was conducted in the press and in digital electronic portals of Portuguese communities abroad, as well as by sending e-mails to emigrant associations and official bodies directly related with emigration. During the month of August, the questionnaire was conducted on the social network Facebook, through the official pages of famous Portuguese singers, resulting in the gathering of another 4800 completed and valid questionnaires. In the last two months of data collection, the questionnaire continued to be conducted on a Facebook Study Page. During this period, with the goal of informing Portuguese emigrants about the forms of participation in the study, the page was released, several times a day, through the Portuguese radio and television. In addition, the Study Page was also released to Portuguese emigrants in all digital newspapers that cooperated in the survey, and through e-mails sent to General-Director of Consular Affairs and Portuguese Communities, consulates/embassies, associations and the football club houses of Benfica and Porto abroad.

Data analysis was carried out by means of quantitative descriptive analysis (frequencies and crossings) and tests of the correlation of variables, as well as a qualitative analysis through the application of student's t-tests and ANOVA analyses (Kruskal-Wallis and Mann-Whitney). This analysis will be illustrated and discussed in the next section.

5. Results and Discussion

When considering the analysis of the ownership of the second home in the place of origin, it is found that most of the new generation of Portuguese emigrants also reported that the second home in the place of origin belongs to family (38.3%) (Table 1). This may also explain their greater predisposition to invest in self-employed secondary residence services in place of origin in Portugal (see Santos and Freitas, 2023).

Table 1. Age of the new generation of Portuguese emigrant's vs Second home ownership in Portugal.

	%	Age of the new generation of Portuguese emigrants			Total
		Under 18 years	Between 18 and 28 years	Between 29 and 39 years	
Second home ownership	Own	1.1%	12.0%	22.3%	35.4%
	Rented	-	0.6%	2.3%	2.9%
	From family	1.7%	21.7%	38.3%	61.7%
	Total	2.9%	34.3%	62.9%	100.0%

Source: Own Elaboration.

The hypothesis was tested that the new generation of Portuguese emigrants approves the possibility of renting accommodation units in the second home (of the owner-builder) in the place of origin if they benefit from the exemption of the municipal property tax. The data obtained with Spearman's coefficient leads to the conclusion that age negatively influences the opinion of emigrants that the second home of place of origin may be considered their cultural legacy ($r=-0.069$), as well as their predisposition to rent rooms to tourists there, even if they benefit from the exemption of property tax ($r=-0.130$). However, among emigrants of the working age, we found that, although those between the ages of 29-39 are the ones who most reject the fact that the second home in the place of origin may be considered their cultural legacy and manifest they are less willing to rent rooms in those houses to tourists (if they benefit from the exemption of property tax), they are also the ones that most confirm these two scenarios (12.9% and 24.6%, respectively) (Tables 2 and 3). The same trend of responses can be observed in emigrants under 29 years of age, but in lower percentages.

Table 2. Age vs The second home of the place of origin is Portuguese emigrant's cultural legacy.

	%	Age			Total
		Under 18 years old	Between 18 and 28 years old	Between 29 and 39 years old	
The second home is Portuguese emigrant's cultural legacy	Yes	-	8.9%	12.9%	21.8%
	Maybe	-	7.4%	10.9%	18.4%
	No	-	17.4%	27.7%	45.2%
	Doesn't no/Doesn't answer	2.1%	5.5%	7.1%	14.7%
	Total	2.1%	39.2%	58.7%	100.0%

Source: Own Elaboration.

Table 3. Age vs Rental of rooms to tourists in the second home (of the owner-builder) in the place of origin with exemption from property tax.

	%	Age			Total
		Under 18 years old	Between 18 and 28 years old	Between 29 and 39 years old	
Rental of rooms with exemption from property tax	Yes	-	16.5%	24.6%	41.1%
	Maybe	-	11.6%	15.4%	27.0%
	No	-	6.6%	9.3%	15.9%
	Doesn't no/Doesn't answer	3.9%	5.0%	7.1%	16.0%
	Total	3.9%	39.7%	56.4%	100.0%

Source: Own Elaboration.

Two chi-square tests of independence were also used in this study to test the association between the desire of Portuguese emigrants to return and settle in Portugal and their opinion that the second home of the owner-builder in the place of origin is their Portuguese cultural legacy. In the first case, it was tested whether the emigrant's desire to return and settle in Portugal is independent of their opinion that the second home of the owner-builder in the place of origin is their Portuguese cultural legacy. In the second one, it was tested whether the age group influence emigrant's opinion that the second home of the owner-builder in the place of origin is their Portuguese cultural legacy. Table 4 lists the observed counts of all levels of the variables of interest.

Table 4. First chi-square test.

		The second home of the owner-builder in the place of origin is their Portuguese cultural legacy				Total
		Yes	Maybe	No	Do Not Know	
Desire to return and settle in Portugal	Yes	128	18	16	2	164
	Maybe	38	15	16	2	71
	No	20	8	11	3	42
	Do Not Know	13	10	5	3	31
	Total		199	51	48	10
Age Group	Less Than 18	6	5	3	2	16
	Between 18 and 28	77	14	14	3	108

	Between 29 and 39	116	32	31	5	184
Total		199	51	48	10	308

Source: Own Elaboration.

When computing the chi-square statistics, there were more than 20% of cells whose expected counts are less than 5, conditioning the application of the test in either case. Therefore, some adjustments had to be made. In the first case, since the number of answers from level “do not know” is relatively low, it was dropped from both questions, leaving the other three response levels unchanged. In the second case, the answers from the “less than 18” group were included in those from the “between 18 and 28” group and then renamed as “less than 29”. Here, only three response levels were also considered, as described for the former case. Table 5 summarizes all the chi-square test results obtained, namely the statistic χ^2 , the p-value and the degrees of freedom. Additionally, an effect size was also calculated using Cramer’s V. The value of n indicates the total number of observations considered after the data changes.

Table 5. Second chi-square test.

The second home of the owner-builder in the place of origin is their Portuguese cultural legacy		
Desire to return and settle in Portugal	χ^2 : 20.2 p-value: < 0.000 df: 4	n: 270 V: 0.194
Age Group	χ^2 : 0.822 p-value: 0.663 df: 2	n: 298 V: 0.053

Source: Own Elaboration.

In the first chi-square test, the associated p-value was less than 0.000, below the alpha level of 0.05, suggesting a statistically significant association between the desire of Portuguese emigrants to return and settle in Portugal and their opinion that the second home of the owner-builder in the place of origin is their Portuguese cultural legacy. An effect size was found to be 0.194. While this effect size is statistically significant, it is moderate in magnitude, considering the degrees of freedom. On the other hand, in the second chi-square test, the associated p-value was approximately equal to 0.663, meaning that the null hypothesis of independence between the age groups and emigrant’s opinion that the second home of the owner-builder in the place of origin is their Portuguese cultural legacy could not be rejected, regardless of the usual significance levels. In other words, there is no relationship between these two variables.

6. Conclusions

The phenomenon of the owner-builders of second homes, described in this study, resulted from the great wave of emigration that occurred between the mid-1950s and the mid-1970s mainly caused by the lack of jobs and salaries in Portugal, as also emigrants desire to return to their places of origin. The common project to build a second home there, was the most evident way in which they affirmed their material and symbolic commitment to Portugal, revealing the extent to which they were linked to their origins. Most Portuguese emigrants opted to build a new house themselves in the place of origin, rather than undertaking a renovation project, mainly as a strategy of differentiation from the past, because of their improved socioeconomic condition and the transformations of their own taste. These are, above all, large houses with individual, exuberant and expressive styles, with sumptuous interior. The owner-builders of second homes still have preserved the rural organization of the

houses in the region—with a vegetable garden, orchard and trellises on the sides and back of the house. Most of them also have other cultivated lands scattered through the village.

Since rural areas in Portugal are socially depressed, with only populations of up to 2000 inhabitants, and tourism can be a driving force for the economic activity, data analysis show that the new generation of Portuguese emigrants (of the working age) consider the second home of the owner-builder in the place of origin their Portuguese cultural legacy (from family) and can encourage their return, as also renting accommodation units in there (if with financial benefits), in view of rural tourism businesses development in the place of origin. Recognizing that conflicts may arise between family members when the authority over the second home is being transferred between generations, more research is still needed so that conclusions can be drawn.

Conflicts of Interest: No potential conflict of interest is reported by the authors.

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