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**Second Home Tourism Development in Portugal – Expectations of Portuguese Emigrants**

This study proposes to fill a gap in research by analysing the expectations of Portuguese emigrants regarding tourism investments and development in their place of origin. The questionnaire survey method was used for collecting data from emigrants. The data were analysed using quantitative descriptive analysis and tests of the correlation of variables, together with a qualitative analysis through the application of student's t-tests. Additionally, the regression model was used for tourism demand analysis. Results show that Portuguese emigrants aged 29-39 with a house in a rural county in Portugal can promote second-home tourism development in Portugal.

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Keywords: Emigration; Second Home Tourism; Rural Development; Portugal.

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**Introduction**

Low- Since the second half of the twentieth century up to the present time, the mobility strategies of the Portuguese rural population have been conditioned by factors especially related to employment and income opportunities and the desire to return to their origins. This migration

circulation has been accompanied by the practice of double (or multiple residencies) and has imposed a mode of Portuguese emigrant behaviour that varies according to the opportunity. In this regard, Portuguese emigrants have built second homes in their place of origin with the aim of returning and settling in Portugal. Thus, the recognition of the persistency of socioeconomic problems in rural areas, namely unemployment, the decline and aging of the population living there and their relative remoteness from markets and services, as well as the recognition of the potential of the tourism sector for the development of these territories, has led this study to assess whether Portuguese emigrants can have a positive impact on tourism development, particularly second home tourism, in rural areas.

Studies conducted in Portugal related to the impact of return migration and rural development are scarce (see Silva et al., 1984; Silva, 1985; Cepeda, 1988; Portela & Nobre, 2001; Gonçalves, 2007). The only exception is the Project "Entrepreneurship 2020" of the AEP Foundation, supported by Portugal 2020. However, the expectations of Portuguese emigrants regarding tourism investments and development in the place of origin have not been considered for analysis. Hence, in the wake of ongoing research (see Santos, 2013; Santos et al., 2019; Santos, 2021), this article proposes to fill this gap.

### **Literature Review- Mobility strategies of Portuguese emigrants**

Rural areas continue to face various social challenges, which include unemployment, the decline and aging of the population living there, and their relative remoteness from markets and services. When analysing the mobility strategies of the Portuguese who emigrated in the second half of the twentieth century and afterward, we find that their mobility has been conditioned by push factors, especially related to employment and income opportunities (Poinard, 1983; Arroiteia, 1985, 2001; Ferrão, 1996; Baganha & Góis, 1999; Arroiteia & Fiss, 2007; Gonçalves, 2007; Pires et al., 2020;

Portela & Nobre, 2001; Rocha-Trindade, 1976) and pull factors related to the emigrants' connection to family and place (Rempel & Lobdell, 1978; Silva et al., 1984; Amaro, 1985; Champion & Vandermotten, 1997; Bryden & Bollman, 2000; Stewart, 2001; Gonçalves, 2007). Until the 1960s, most Portuguese emigration was to Brazil (Arroteia, 2001; Marques, 2001). The heavy emigration which occurred between the mid-1950s and the mid-1970s was linked to post-war European economic growth, in an essentially intra-European process of a massive transfer of labor from the peripheral south to the industrialised north, Portugal being substantially involved in this transfer from the 1960s onwards (Barreto & Monica, 1999).

With the closure of immigration in the mid-1970s, measures were taken by the host countries, which aimed at promoting the integration of emigrant communities and encouraging their return to countries of origin. (See for example Arroteia, 1985; Baganha & Góis, 1999). Portuguese emigration did not end between 1973-1974 and increased in the late 1980s and early 1990s (Ferrão, 1996). However, the decade of the 1990s was 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 “pendular” movements with some EU countries (Germany, UK, France) (Ferrão, 1996; Malheiros, 2005). According to Peixoto (2007), while ignoring much of the new context of emigration, there are economic objectives to maximise the income earned in any work abroad for the purpose of improving living conditions, which still encourages the Portuguese to leave, even if only temporarily, their regions of origin - the same regions that still fail to meet their needs (see also Malheiros, 2005).

With the proximity of these countries and the ease of travel, the emigrants never completely cut the umbilical cord with their country of origin, as they sent back their savings and built a residence there (see, for example, Rocha-Trindade, 1976; Silva et al., 1984; Arroteia, 1985; 2001;

Caspari, 1985; Gonçalves, 2007). In this respect, the project of building a residence has existed since the early years of immigration, revealing the extent to which the emigrants were linked to their origins. When the economic objectives outlined at the outset are met, the affective factors of connection to the family and place are preponderant in the decision to return (Amaro, 1985; Rempel & Lobdell, 1978; Silva et al., 1984; Gonçalves, 2007). Thus, the link to the family and place takes priority over the best wages and employment opportunities at the place of origin of emigrants since these are the minimum conditions and not the main motivation for their return (Champion & Vandermotten, 1997; Bryden & Bollman, 2000).

This migration-circulation strategy results from the forces of globalisation and the desire to return to origins, accompanied by the practice of double/multiple residencies, imposing a mode of behaviour that varies according to the opportunity. Despite the fact that second homes are sometimes associated with tensions within and between communities (see Müller and Hall, 2018), in Portugal, second homes are part of the identity of rural areas because they belong to locals - the Portuguese emigrants (Santos, 2013; Santos, 2019). For this study, second homes are recreational and intended for consumption purposes, including health, retirement, and lifestyle (see, for example, Wu & Xu, 2018).

The mobility strategies of Portuguese emigrants described in the previous section help explain the increase of second homes in rural areas in Portugal. In this regard, the acculturation process of Portuguese emigrants has enabled them to integrate abroad without renouncing their cultural identity, being spatially projected through constructing those second homes in the place of origin (Santos, 2013; Santos, 2019). In this section, we also argue that the return of Portuguese emigrants, since it represents tourism development, can positively impact rural development in Portugal. Rural development will be seen as "an interventionist process of qualitative, quantitative,

and/or distributive change, which leads, in one way or another, to an improvement in the living conditions of a community" (Diniz, 1999: 97-99).

In this regard, scientific literature has shown that tourism can be a viable development strategy in the emigrant's place of origin due to its multiplier effect in creating employment and income in this sector and others that support or attract visitors and tourism companies (see for example, Balaguer & Jordá, 2002; Cannonier & Burke, 2019; Chen & Yang, 2010; Croes & Rivera, 2017; Crompton & Ji, 2016; Ferrari et al., 2018; Fleischer & Felsenstein, 2000; Hjerpe, 2018; Hsu, 2019; Hyojin & Byung-Gook, 2015; Kim & Miller, 2017; Klytchnikova & Dorosh, 2013; Laterra et al., 2019; Lee et al., 2013; Pascariu & Ibanescu, 2018; Stephen, 2015; Tohmo, 2018; Vanegas & Croes, 2003).

Empirical evidence has also shown that the positive impacts of tourism on employment and income are more related to small and medium-sized tourism companies compared to big companies, implying more local economic cooperation (Fleisher & Felsenstein, 2000; Labrianidis & Thanassis, 2003; Wall & Mathieson, 2006; Gonçalves, 2007). However, despite the increasing importance of the promotion of the small-business sector, due to problems in the more deprived territories of the European Union, the scarcity of initial capital and technical know-how constitute a barrier to the development of small businesses, which depends heavily on external funds (Black et al., 2003; Gonçalves, 2007). In this scope, the creation of small and medium-sized companies can be one of the contributions of Portuguese emigrants to increasing the competitiveness and productivity of the national business sector, not only boosting employment but also local and national economic development. Moreover, their permanent return can contribute to rural development since they maintain strong ties to their land of origin, impacting consumption and production. This matter will be taken up in the next sections.

In Portugal, the excessive fragmentation of land ownership is an important limitation to the development of national agriculture, so the link between this sector of economic activity and tourism in rural areas presents itself not only as an opportunity for diversification of the economy but also as a strategy for raising the income of rural households (Cavaco, 1981; Pires, 1988; Avillez & Monke, 1998; Gonçalves, 2005; Cordovil et al., 2003; Covas, 2008). Thus, when taking into account the rural organisation of the residences of Portuguese emigrants in their place of origin in general - with orchards, vegetable gardens, and painted on the sides and back of the house; the fact that most of the land they own is dispersed throughout the villages; seeing that agriculture, primarily for self-consumption, is one of the activities most practiced by the emigrants, not only when they return to their places of origin but also, where possible, in their host countries; given the tendency to use simple techniques and not to employ insecticides; plus, due to the excessive fragmentation of property ownership in the north and centre of Portugal, it is very likely that tourism would be the main activity carried out by Portuguese emigrants and that agriculture, primarily for self-consumption, will function only as a complementary activity, providing a substantial supplement to their income (Santos, 2013; 2021).

## **Methodology**

Whereas one of the most common approaches to measuring tourism is on the demand and supply side (see, for example, Smith, 1995), this will also be the methodology followed by this study for the discussion of the impact of the independent variable *emigration* on the dependent variable *second home tourism development* in Portugal. For both analyses (supply and demand), the data were divided into two groups according to the degree of centrality index (CI) of municipalities in Portugal, including the Autonomous Regions of the Azores and Madeira: the higher CI group and the lower CI group. To this end, it is considered that the counties with the higher centrality index

are situated at a rank of 50 (hierarchy of urban centres in Portugal). The centrality index in urban centres, based on the areas of influence and functional marginality, allows for identifying the areas with a lower capacity of polarization, which is the most deprived areas. In this sense, the number of functions provided by an urban centre is considered, as well as an associated weighting, to reflect the degree of specialization of the function and the number of functional units that the urban centre holds (INE, 2004).

The number of Portuguese emigrants scattered around the world is unknown. From the perspective of tourism supply-side analysis, the questionnaire survey method was used for data collection from Portuguese emigrants aged 18–39 years or married. The intention was to collect the greatest possible number of questionnaires from Portuguese emigrants, 5157 of which were considered valid. The questionnaire was sent by mail to addresses provided by the publishers of local newspapers to which they are subscribers and by the Internet (through social networks of Portuguese singers and the creation of the study page on Facebook publicized by the media). Data analysis was carried out by means of quantitative descriptive analysis and tests of the correlation of variables, as well as a qualitative analysis through the application of student t-tests. The authors used Pearson's or Spearman's correlation coefficient to measure the association between the variables. The aim was to assess whether emigration influences tourism development in Portugal using a supply-side analysis.

From the tourism demand analysis perspective, secondary information sources of the National Statistical Institute were used to analyse total overnight stays and migratory balance in Portugal. A statistical analysis of the two variables, both defined as time series, was carried out: Portuguese emigration, represented by annual records of the migratory balance between the years 2013 and 2019, which was attributed a positive sign when inflows were higher than outflows and

a negative sign otherwise, and the tourism demand in Portugal, represented by annual records of total overnight stays (in hotels, local accommodation, and rural tourism) within the same period. Given the need to analyse the same time series of both variables and the non-existence of monthly data on the migratory balance and the number of Portuguese emigrants, the analysis was carried out with the available annual data of both variables. Additionally, the regression model was used for the analysis of both variables: migratory balance and total overnight stays (in hotels, local accommodations, and rural tourism). The aim was to assess whether emigration influences tourism demand in Portugal.

## Results

The analysis of data reveals that most emigrants have at least one house in a county with a lower centrality index or rural areas (77.4%), while only 21.5% have a house in a county with a higher centrality index (Table 1). In this regard, the conclusions of ongoing research (Santos, 2013; Santos et al., 2019; Santos, 2021) have already shown that those emigrants aged 29-39 who have a house in a rural county in Portugal are the ones who would like to return; have a job in tourism; have sufficient capital to invest in this sector; and also have training and professional experience in the tourism/hospitality sector. Thus, these findings have already allowed us to conclude that Portuguese emigrants aged 29-39 who have a house in a rural county in Portugal can contribute to tourism development in rural areas of Portugal.

*Table 1 County of the house of Portuguese emigrants in Portugal*

County of the house	No.	%
Higher centrality index	1,109	21.5
Lower centrality index	3,989	77.4
Doesn't Know/ Doesn't Answer	59	1.1
Total	5,157	100.0

Source: Authors



The same studies also pointed out that the same emigrants would still like to have control over their working hours in Portugal and reconcile tourism with traditional agriculture, mainly for self-consumption (Santos, 2013; Santos, 2021). In this context, it is highlighted that, due to the characteristics of their second homes in the place of origin and their liking for traditional agriculture and skills, Portuguese emigrants can positively impact the development of rural areas and grow the green economy in Portugal.

When analysing their tourism investment intentions, the data obtained with the Spearman coefficient are inconclusive in regard to the relationship between the variables "age" and "county of the house in the place of origin" of Portuguese emigrants and "their tourism investment intentions." However, Table 2 also tells us that, although most emigrants aged 29-39 years report having a family residence in Portugal, compared to the others of working age, they are also the ones who most mention having their own residence there (22.5 %). If they were to decide to invest in the tourism sector, it is again these emigrants aged 29-39 who report most that they would invest mainly in secondary self-employed residence services (64.6 %) (table 3). Thus, the results suggest that having their own residence in Portugal might, in some way, influence the emigrants' predisposition to invest in secondary residency services on their own in Portugal.

*Table 2 Age of Portuguese emigrants vs. Property of the house in Portugal*

%		Age of Portuguese emigrants			Total
		Under 18 years of age	Between 18-28 years old	Between 29-39 years old	
Property of the house in Portugal	Have their own house	1.1%	12.0%	<b>22.3%</b>	35.4%
	Rented	-	0.6%	<b>2.3%</b>	2.9%
	Family home	<b>1.7%</b>	<b>21.7%</b>	<b>38.3%</b>	61.7%
	Total	2.9%	34.3%	62.9%	100.0%

Source: Authors

*Table 3 Age of Portuguese emigrants vs. Area where Portuguese emigrants would like to invest in the tourism sector in Portugal*

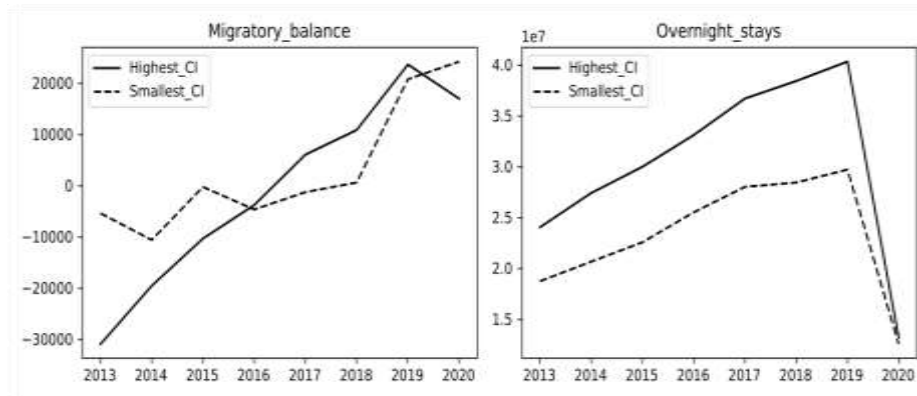
%		Age of Portuguese emigrants		
		Under 18 years of age	Between 18 and 28 years old	Between 29 and 39 years old
Area where Portuguese emigrants would like to invest in the tourism sector	Recreation services and other leisure services	-	41.1%	58.9%
	Cultural services	-	35.4%	<b>64.6%</b>
	Renting of transport equipment	-	43.1%	56.9%
	Tourism information and tourism guides	-	<b>58.5%</b>	41.5%
	Tourism operator services	-	<b>50.4%</b>	49.6%
	Travel agency services	-	43.2%	56.8%
	Transport support services	-	49.5%	50.5%
	Air transport services	-	36.8%	<b>63.2%</b>
	Shipping transport services	-	<b>50.0%</b>	50.0%
	Road transport services	-	35.9%	<b>64.1%</b>
	Railway transport services	-	41.2%	58.8%
	Catering	-	45.4%	54.6%
	Secondary self-employed residence services	-	38.8%	<b>61.2%</b>
	Hotels and other accommodation services	-	39.3%	60.7%
	None	25.4%	23.7%	50.8%

Source: Authors

To assess whether emigration influences tourism demand in Portugal, simple regression analyses were carried out, in which total overnight stays are the dependent variable and migratory balance is the independent or explanatory variable. The data was divided into two groups according to the degree of centrality index (CI) of municipalities in Portugal, including the Autonomous Regions of Azores and Madeira: the higher CI group and the lower CI group. The available database encompasses a total of 308 Portuguese municipalities. In order to take into account all the information, omitted values were replaced by zero rather than removing municipalities with missing values. Thus, 259 municipalities were included in the lower CI group and the remaining 49 in the higher CI group. Subsequently, annual sums of the values belonging to the municipalities in each group were determined. The statistical analysis focused essentially on exploring the linear relationships between the two variables, specifically whether variations in one variable were correlated with variations in the other. Figure 1 shows the evolution of both data sets between

years 2013 and 2020, regardless of the accommodation type (hotels, local accommodation, and rural tourism) for the overnight stays.

*Figure 1 Evolution of the original time series over time in each group*



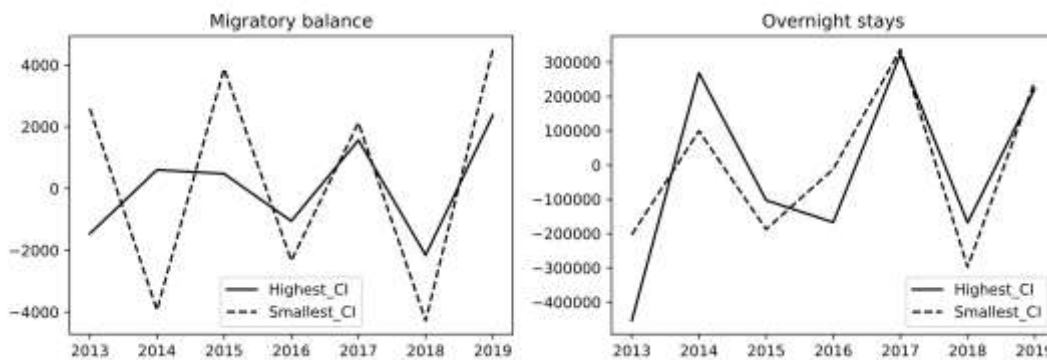
Source: Authors

In each group, both series increase on average over time, except in the year 2020, where the corresponding values of overnight stays drop sharply. This can be easily accounted for by the COVID-19 pandemic that affected the entire world, leading to a major downturn in foreign tourist movement. Since these figures are very different from those of previous years and thus viewed as outliers, the statistical study was continued without the year 2020, leaving seven pairs of observations in each group for the subsequent regression analysis.

Since the data are represented by time series, the correlation study was done after removing the trend contained in the series, as it tends to obscure the true correlation between the variables. In general, a time series in which the mean changes over time can exhibit one of two types of trends – deterministic trend or stochastic trend (Hyndman & Athanasopoulos, 2018) – each modeled differently from the other, resulting in different detrended time series and, hence, distinct regression results. For very small data sets, there are not many effective ways to remove the trend component, and it is almost statistically impractical to detect which type of trend fits the data "better." In view of that, three detrending approaches were considered: (HF) trend components

were estimated using the Henderson filter (Henderson, R., 1916), a kind of moving average method based on the generation of polynomials of degree 3, with the advantage of producing smoothed curves and preserving turning points, and then removed from the original data; (DT) assuming a deterministic trend, the detrended data was obtained by regressing each time series on a first-degree polynomial function of time; (ST) assuming a stochastic trend, each time series was first-differenced to isolate the stationary component, resulting in a series with one fewer observation. Any significant conclusion drawn from the regression analysis should be somewhat consistent among the approaches or at least not be too differing. For the sake of illustration, Figure 2 shows the detrended series using the approach MA.

*Figure 2 The detrended series obtained from approach MA in each group.*



Source: Authors

In a preliminary regression analysis in which the accommodation types in terms of overnight stays were not distinguished, a total of 9 regressions were carried out – one for each group according to the degree of centrality index (higher CI, lower CI, and full sample) using the different detrending approaches (HF, DT, and ST). All samples considered were independently normalised, resulting in standardised coefficients in the linear regression models. Table 4 shows the corresponding regression results for the total overnight stays (measured in standardised

deviations from the mean), regardless of the accommodation type. The values for the intercept were omitted due to the normalisation.

*Table 4 Regression results for the total overnight stays, regardless of the accommodation type (standardised deviations from the mean).*

	HF			DT			ST		
	High. CI	Low. CI	Full sample	High. CI	Low. CI	Full sample	High. CI	Low. CI	Full sample
Migratory Balance	<b>0.820**</b> (0.256)	0.272 (0.430)	0.406 (0.409)	0.085 (0.446)	-0.662 (0.335)	-0.648 (0.341)	0.209 (0.489)	-0.377 (0.463)	-0.369 (0.465)
p-value	<b>0.024</b>	0.555	0.367	0.855	0.105	0.116	0.691	0.461	0.472
R-squared	0.672	0.074	0.164	0.007	0.438	0.420	0.044	0.142	0.136
No. observ.	7	7	7	7	7	7	6	6	6

Standard errors are reported in parenthesis.

\*\* indicates significance at the 95% level.

Source: Authors

The p-value displayed in the table tests the null hypothesis that the corresponding regression coefficient is equal to zero (no effect), meaning that, if the p-value is less than the predefined significance level, then there is a statistically significant relationship between the migratory balance and the total of overnight stays. The coefficient of determination, given by the value of  $R^2$ , tests the effectiveness of the linear model adjustment and represents the proportion of the variance in the dependent variable that is explained by the independent variable. Although the results show one statistically significant regression at the 95% level, suggesting a strong positive linear correlation between the underlying variables, the overall results are inconsistent among the different detrending approaches or between the groups.

The study proceeded to a second analysis to assess whether migratory balance influences the total of overnight stays regarding the accommodation type. Keeping the same strategy as before, 9 regressions were performed for each accommodation type: hotels, local accommodation, and rural tourism. The corresponding regression results are shown in Table 5.

*Table 5 Regression results for the total overnight stays regarding the accommodation type (standardised deviations from the mean).*

Hotels									
	HF			DT			ST		
	High. CI	Low. CI	Full sample	High. CI	Low. CI	Full Sample	High. CI	Low. CI	Full sample
Migratory	0.458	0.216	0.231	-0.151	-0.478	-0.585	-0.002	-0.303	-0.348
Balance	(0.398)	(0.437)	(0.435)	(0.442)	(0.393)	(0.363)	(0.500)	(0.477)	(0.469)
p-value	0.302	0.642	0.618	0.747	0.278	0.168	0.997	0.560	0.499
R-squared	0.210	0.047	0.053	0.023	0.228	0.342	0.000	0.092	0.121

Local accommodation									
	HF			DT			ST		
	High. CI	Low. CI	Full sample	High. CI	Low. CI	Full Sample	High. CI	Low. CI	Full sample
Migratory	-0.096	<b>0.981***</b>	-0.392	-0.478	<b>0.848**</b>	-0.252	-0.327	<b>0.899**</b>	-0.381
Balance	(0.445)	(0.087)	(0.411)	(0.393)	(0.237)	(0.433)	(0.473)	(0.219)	(0.462)
p-value	0.838	<b>0.000</b>	0.384	0.278	<b>0.016</b>	0.585	0.527	<b>0.015</b>	0.457
R-squared	0.009	0.962	0.154	0.228	0.719	0.064	0.107	0.809	0.145

Rural tourism									
	HF			DT			ST		
	High. CI	Low. CI	Full sample	Low. CI	Small. CI	Full Sample	High. CI	Low. CI	Full sample
Migratory	<b>0.682*</b>	<b>0.721*</b>	0.637	0.075	<b>0.797**</b>	<b>0.693*</b>	0.328	0.695	0.583
Balance	(0.327)	(0.310)	(0.345)	(0.446)	(0.270)	(0.323)	(0.472)	(0.359)	(0.406)
p-value	<b>0.092</b>	<b>0.067</b>	0.124	0.873	<b>0.032</b>	<b>0.084</b>	0.525	0.125	0.224
R-squared	0.465	0.520	0.406	0.006	0.635	0.480	0.108	0.483	0.340

Standard errors are reported in parenthesis.

\*, \*\*, \*\*\* indicates significance at the 90%, 95%, and 99% level, respectively.

Source: Authors

Regarding hotels, there is not enough relevant information to conclude anything, as the overall results are inconsistent across the different detrending approaches. Concerning the local accommodation, the regression coefficient and corresponding p-value suggest that there is a strong positive linear correlation between the variables in the municipalities with a lower centrality index, that is, the greater the migration balance from one year to the next, the greater the total of overnight stays. No conclusion can be drawn regarding local accommodation in the municipalities with a higher centrality index despite the regression coefficient suggesting a very weak to moderate negative linear correlation between the variables. In the case of rural tourism, the results show a certain level of agreement with those of local accommodation but only regarding municipalities

with a lower centrality index since, in this case, the linear correlation tends to be positive in the municipalities with a higher centrality index also.

## **Conclusion**

The mobility strategies of Portuguese emigrants described in this study help explain the increase of second homes in rural areas in Portugal, especially from the second half of the twentieth century onwards, to reinforce their cultural identity and the desire to return to their place of origin. Thus, having their own residence in Portugal might have influenced, in some way, the results obtained in this study. In this regard, from the supply-side analysis, the findings show that among Portuguese emigrants aged 29-39, secondary self-employed residence services are Portugal's main tourism investment intentions. The same group of emigrants, aged 29-39, are also the ones who most mention having their residence in the place of origin (or rural area).

From the demand side, although some relevant conclusions could be drawn from the present results, many more years would need to be analysed to provide better insights and greater certainty about the influence of the migratory balance on the total overnight stays for each accommodation type. Nevertheless, despite the lack of monthly data for the migratory balance and the number of Portuguese emigrants from 2013 to 2020, the results of the present study suggest that their return might even encourage tourism demand in rural areas of Portugal, particularly in rural and local accommodations types. Therefore, we suggest that Portuguese emigrants can promote second-home tourism development in rural areas of Portugal. In this regard, we propose future studies be made to geographically identify the second homes with potential for cultural heritage throughout the rural territory of Portugal to learn which ones may be suitable for marketing as second home tourism.

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#### Disclosure statement

No potential conflict of interest is reported by the authors.

#### Funding:

Funded by national funds through FCT – Portuguese Science and Technology Foundation, within the project reference UIDB/04470/2020.



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