

## **SECOND HOMES IN PORTUGAL: CONCEPTUAL ISSUES AND FINDINGS OF DESK AND FIELD RESEARCH**

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### **Introduction**

The expansion of second homes has been an important feature of land use and landscape change in Portugal. In the period 1991 - 2001, their number increased 40% (the number of first home dwellings grew only 16%), so that 929,936 second homes in 2001 represented 20% of all dwellings. The presence of second homes has been evident in diverse parts of the country – from the highly urbanized and dynamic littoral to the aged and stagnating rural interior – especially in areas with attractive natural and cultural landscapes and other amenities. In Portugal, like in other Southern European countries, second homes have a greater share in the housing stock than in other parts of Europe.<sup>1</sup>

The expansion of second homes may be explained by a wide range factors, such as: i) the still strong bonds to the place of origin, mostly rural, among the first and second generation of internal migrants and among Portuguese emigrants that spend weekends and/or their vacation in their former permanent residences, or built second homes while they were already abroad; ii) the general improvement of income level and, consequently, the adoption of consumption patterns where the second home is supposed to serve recreation and leisure needs, as well as an additional long-term safe investment in the context of the behaviour of the Portuguese property market in recent decades; (iii) the nationwide expansion of a modern road network and the generalised use of private automobiles; (iv) the increasing attractiveness of Portuguese landscapes reflected in the

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<sup>1</sup> For instance, Spain 27 %; France: 9%, %; the Netherlands: 5%, UK and Germany: 1 (source: Leal 2006, Casado-Díaz 2004)

increasing number of foreigners, mostly retirees, that spend a significant part of the year in Portugal.

Recent spatial and sectorial development policy agendas have been marked by the growing importance attributed to second homes in Portuguese tourism. However, the impacts of second home expansion have been perceived quite differently. For example, in the National Strategy for Tourism Development,<sup>2</sup> the Portuguese Government considers second home tourism as one of the top-ten priorities to be promoted, while in the National Programme for Spatial Planning<sup>3</sup> it is recommended to control its expansion because of the effects it can have on the sustainability and management of land use and landscapes. The problem is that such policy statements have not been based on solid scientific understanding of this phenomenon. Only few local field studies about some rural and coastal resort areas were carried out in the 1980s and 1990s, but no research on second home tourism *per se*, or in broader terms, was ever undertaken at regional and national levels. In fact, the growing omnipresence of second homes and the inherent environmental, economic, cultural and other aspects of land use conflicts and/or synergies are nowadays frequent discussion topics among policy- and opinion-makers, especially in the mass media, but this phenomenon has not yet become part of the research agenda in Portugal.

In order to fulfil this gap, a research project entitled “SEGREG - Second Home Expansion and Spatial Development Planning in Portugal”, financed by the Portuguese Fund for Science and Technology, was launched in 2008. This has been the first, and insofar the only comprehensive research endeavour that explicitly deals with the issue of second home expansion and its impacts on spatial development at the national and regional levels. The working definition of “second home” adopted in the project is the one of the Portuguese Population and Housing Census: “Classical family dwellings of seasonal or secondary occupancy where no family member lives permanently”.<sup>4</sup>

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<sup>2</sup>Source: [http://www.portugal.gov.pt/Portal/PT/Governos/Governos\\_Constitucionais/GC17/Ministerios/MEI/Co-municacao/Intervencoes/20060118\\_MEI\\_Int\\_SET\\_PENTurismo.htm](http://www.portugal.gov.pt/Portal/PT/Governos/Governos_Constitucionais/GC17/Ministerios/MEI/Co-municacao/Intervencoes/20060118_MEI_Int_SET_PENTurismo.htm).

<sup>3</sup> Source: [http://www.territorioportugal.pt/Storage/pdfs/Sumario\\_PNPOT.pdf](http://www.territorioportugal.pt/Storage/pdfs/Sumario_PNPOT.pdf).

<sup>4</sup> Any research on second homes is confronted with the lack of consensus about their definition. This is because of their complexity in terms of causes/motives of their existence, frequency of occupancy and purpose of use or, as Coppock (1977 in Paris 2006) states, “the dynamic character of the second home, in particular the changing relationship between the first and second home... makes identification and measurement difficult”. The multiplicity of terms mirrors such situation: “second homes”, “vacation

In this article the main findings of the first phase of the project, mostly based on macroscopic (desk) research, and the first results of the second phase which consists of microscopic (field work) research that is being carried on are presented and discussed hereunder.

## **1. Spatial typology of second homes**

In the first phase of the project, a spatial typology was produced to provide a basic analytical framework for (i) a better understanding of the spatial impacts and (ii) a sustainable integration of second homes expansion in spatial development policies, particularly those concerning land use change, at regional and local levels. In view of the lack of any previous research in Portugal, the specific objectives are to provide, first, a classification of territories according to second homes expansion and, second, a description of major features of this phenomenon in each spatial type.

### **1.1. Conceptual-methodological framework**

Spatial distribution patterns and, particularly, spatial typologies have been a rare subject in second home research (Pettersson 1999). Decades ago, Coppock (1977) identified the rural-urban fringe, holiday resorts and the scattered populated rural countryside as locations for second homes. Other important studies are the following: Barke (1991) on the spatial distribution of second homes in Spain in the 1970s and 1980s; Deffner et al (2002) on a spatial typology based on the proportion of empty dwellings in the Greek municipalities of the Evoikos Coastal Area; Shellito and Pijanowski (2003) on the spatial distribution of seasonal homes in the upper Great Lakes region; Gallent et al (2003) on the changing geography of second homes in rural Wales; Colás and Cabrerizo (2004) who used multiple logistic regression to identify the factors behind the spatial distribution of second home owners in Spain; Visser (2004) on a typology of regions according to the use of second homes in South Africa; Marjavaara and Müller (2007) on attractive second home landscapes in Sweden. A common feature of most of these research contributions on spatial distribution and typologies is that they are mostly based only on one or two indicators.

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homes", "seasonal homes", "weekend homes", "summer homes", "cottages", "retirement homes", "recreational homes", among others.

The lack of more numerous and comprehensive spatial typologies in the literature is probably due to the fact that second homes research has been conducted mostly in countries where this phenomenon is spatially concentrated and/or place-specific (Gallent et al 2003, Müller et al 2004). Spatial typologies have been lacking even in Southern Europe where second homes expansion is evidenced across entire countries.

This attempt at establishing an inventory of the spatial diversity of second homes is based on data from the 1991 and 2001 Portuguese Population and Housing Censuses that provide the following three variables for NUTS IV, that is, the county: total number of second home dwellings; year of construction of the building in which the second home dwelling is located; and, number of second home dwellings per building.

Using the above variables, five indicators were built as outlined hereunder.

- Share of second home dwellings in the total number of dwellings in 2001 - an indicator of the frequency of occurrence of second homes. It is widely used to determine the intensity and pressure of second home expansion on land (Dijst et al, 2001 in the USA, Casado-Diaz 2004 in Spain);
- Rate of change in the number of second home dwellings between 1991 and 2001 - an indicator of their expansion. It was also used, for example, by Muller (2002) in Sweden and Casado-Diaz (2004) in Spain;
- Share of second home dwellings in mainly residential buildings constructed between 1991 and 2001 in the total number of second home dwellings in 2001 - an indicator of the importance of newly built second homes. It can express the intensity of second homes owned by urbanites with no previous bonds with the place where second homes are located;
- Share of second home dwellings in mainly residential buildings with one dwelling in the total number of second home dwellings in 2001 - an indicator of the importance of individual second homes, more commonly present in rural areas;
- Share of second home dwellings in mainly residential buildings with ten or more dwellings in the total number of second home dwellings in 2001 - an indicator of the importance of second homes in multi-storey buildings. In

Portugal and, also Spain (Leal 2006), second homes in multi-storey buildings are a common feature of metropolitan suburbs and vacation resorts.

The analysis encompassed all 278 counties of Continental Portugal, i.e., excluding the ultra peripheral regions of Azores and Madeira.

The county was chosen as the spatial unit of analysis for the following reasons: variations in the values of the indicators among counties are significant; the county is the basic administrative unit of local government; Spatial Master Plans are designed and implemented at this level; and, the results of this analysis could serve as baseline framework for local land use and development planning. The choice of the county as the unit of analysis also prevents from generalizations that would hide considerable concentration of second homes in few amenity rich places within a region, as pointed out by Casado-Dias (2004) for Spain, Deffner et al (2006) for Greece, and Gallent et al (2002) for England.

Cluster analysis was the statistical set of techniques chosen to build a multicriterial typology of Portuguese counties according to the importance and dynamics of second homes expansion. Besides Geographical Information Systems (Coccossis and Constantoglou 2005, Maryavaara and Müller 2007) and the neural network model (Shellito and Pijanowski 2003), cluster analyses have been quite frequently used to produce multicriterial typologies in spatial planning research, especially in the areas of regional development and tourism (Leatherman and Marcouiller 1996, Paquette and Domon 2003, Schuckert *et al* 2007).

The underlying principle of cluster analysis is to sort cases into groups, or types, in such a way as to arrive at a strong degree of association among cases within the same clusters and weak among members of different clusters (Anderberg 1973). Following the recommendation (Kaufmann and Rousseeuw 1990) that a good strategy is trying out diverse methods, two quite different hierarchical agglomeration methods were tested and compared - the Ward's and 'the nearest neighbour' methods. A non-hierarchical agglomeration method, the K-means, was also applied. The results were rather similar, which showed that the original data matrix contains natural clusters (Maroco 2003). The Ward's method was chosen as preferable on the basis of the cartographic analysis of the

five indicators mentioned above, as well as on the basis of numerous studies that concluded that this method is indeed one of the best overall performers (Rencher 2002).

Two criteria were chosen to determine the number of clusters to be retained: (i) the coefficients of the agglomeration schedule representing the squared Euclidian distance, i.e., the proximity measure selected to agglomerate the clusters; and (ii) the differences between these coefficients. Ultimately, combining the use of these criteria and the empirical knowledge on the subject (Milligan and Cooper 1985), six clusters were selected. They are identified, described and discussed below.

## **1.2. Findings**

### **1.2.1. The Peri-urban fringe**

This cluster comprises 86 counties in the peri-urban fringes of Lisbon and Porto and of coastal and interior regional and sub-regional urban centres (figure 1).

It is characterized by a relatively weak presence of second homes (18.8%),<sup>5</sup> but with a rate of increase (41.2%) above the national average (40%) and a strong presence (28.7%) of newly built second homes.

Peri-urban areas were identified in many studies as a major consumption space for second homes. Within the weekend commuting distance of large urban centres, Jansson (1994 in Pettersson 1999) identifies the 'weekend leisure space', Halseth and Rosenberg (1995) the 'rural-recreational countryside', and Lundgren (1974) the 'recreational hinterlands'. In Sweden Muller (2002) shows that many urbanites choose the outskirts of the metropolitan areas for their second homes. The same holds for the Netherlands (Dijst *et al* 2005). Also in Spain, Casado-Diaz (2004) highlights that almost two thirds of all tourist journeys are made by second home owners to places in the peri-urban fringe.

### **1.2.2. The adjacent countryside**

In this cluster, the proportion of second homes (22.1%) is above the national average (20%). They are predominantly single homes (89%) and register the weakest growth (14.8%). In this cluster, most of the 52 counties are contiguous to peri-urban areas of

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<sup>5</sup> In this section, the figures in parenthesis represent the mean value of an indicator in a cluster.

Lisbon or of regional or sub-regional urban centres on the coast and in the interior figure 2).

In the countryside, adjacent to the rural-urban fringe, a considerable number of second homes are mostly owned by former residents that migrated to Lisbon or to regional and sub-regional centres, or abroad. Most recently, over the 1990s, due to the relatively fast growth of these cities, there was a growing demand for cheap first housing that was met in the nearby countryside, by converting second homes into first homes or by building first home dwellings. Such trend was facilitated by improvements in road infrastructures which led to the expansion of the commuting area not only of Lisbon but also, of the regional and sub regional centres. Eventually, these rural areas will become peri-urban due to the rapid expansion of the suburban zones of those cities, as it was pointed out before. A similar process was also registered in Greece (Andriotis 2006) and Spain (Aledo and Mazón 2004).

### **1.2.3. The depopulated countryside**

This cluster is marked by the largest share of second homes (31.2%), mainly in one dwelling buildings (92.7%), and by a rate of increase (48%) above the national average. Most of the 83 counties of this cluster are in depopulated rural areas, with an aged population, mainly the result of strong emigration and out-migration in previous decades (figure 3).

In other countries of Southern Europe, a large proportion of second homes are also located in the depopulated countryside (in Spain: Collantes and Pinilla 2004; in Greece: Deffner *et al* 2002). Likewise, second homes appear in depopulated, peripheral areas of Northern and North-western European countries such as Ireland (Paris 2006), Wales (Davies and O'Farrell 1981), Scotland (Downing and Dower 1977) and Sweden (Aronsson 2004). However, their presence is less intense than in Southern Europe.

In Portugal, large, mostly younger segments of the population of the North Region and of the northern part of the Centre Region emigrated from early 1960s to mid 1970s to North-Western Europe, while strong out-migration to Metropolitan Lisbon characterized the southern parts of the Centre Region and South-eastern region of Alentejo. Those migrants still maintain strong kinship bonds with their villages of origin and many have renewed their old houses, or built new ones nearby. Thus, their earlier

first residences became second and are mainly occupied during summer holidays or longer weekends, depending on the distance between the place of residence and the second home. This made second housing affordable not only to the elites but also to lower income groups. Also in Spain, the high proportion of second homes in rural areas is explained as a result of early out-migration/emigration (Leal 2006, Cólás and Cabrerizo 2004).

The growth of second homes (48%) above the national average (40%) in the depopulated Portuguese countryside may indicate two quite different processes. First, in many counties, particularly in the North, rural exodus continued in the 1990s, which contributed to the increase of the stock of second homes. Second, in the Centre and Alentejo, such increase is related to a growing interest among urbanites without previous links with rural areas, including foreigners, for buying and restoring old, mostly empty houses, particularly in villages with valuable built heritage.<sup>6</sup> In Portugal, the growing interest for these territories as temporary places of residence can also be explained by the diminishing of travel time as a result of the development of road infrastructures linking the depopulated countryside in the interior to the metropolitan areas of Lisbon and Porto and to regional and sub-regional urban centres in the coastal and interior parts of the country.

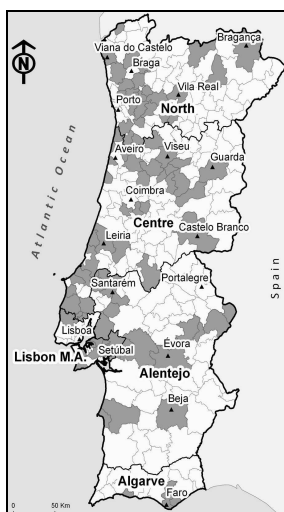


Fig. 1. Peri-urban

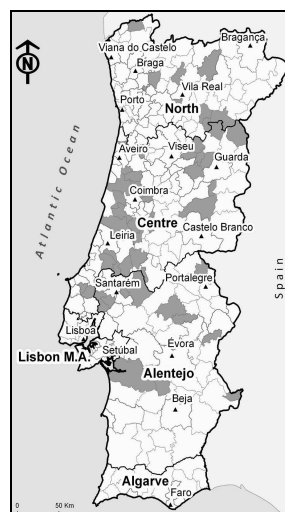


Fig. 2. Adjacent countryside

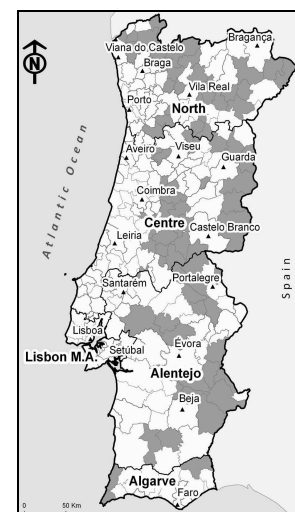


Fig. 3. Depopulated countryside

<sup>6</sup> In Northern and North-Western Europe, the depopulated countryside also attracts second home buyers not only because of kin bonds but also due to the large surplus of empty housing stock (Müller 2002, Aarsson 2004 and Keen and Hall 2004)



#### **1.2.4. Summer vacation resorts**

This cluster is characterized by the highest proportion of newly-built second homes (32.3%), a high percentage of second homes in multi-dwelling buildings (37%) and a high rate of overall increase (64%) of second homes. Most of the 26 counties are scattered along the western coast or concentrated in the western and central parts of the southern region of Algarve (figure 4).

In many countries in Europe and other parts of the world, vacation resorts are the main destination of second home owners and other tourists, particularly in coastal and mountain areas such as those in Turkey (Tamer *et al* 2006), in Greece (Deffner *et al* 2002), in Spain (Barke 1991), in Sweden (Müller 2004), in Norway (Flognfeldt 2006), in the USA (Burby 1979), in New Zeland (Keen and Hall 2004), and in Argentina (Muñoz *et al* 2003).

To spend vacations in coastal resorts has been appealing to many Portuguese and foreign tourists. The driving force behind the choice of such resorts for second home location is the desire to spend summer vacations on the beach, enjoying Mediterranean climate and the unique cultural milieu (King *et al* 1998).

#### **1.2.5. The natural and cultural amenity rich countryside**

A strong presence of second homes (28%) with the highest rate of increase (110%) characterizes this cluster. Most of the 21 counties are in rural areas with protected natural and cultural landscapes (figure 5). This type of second home areas was identified in Australia (Paris 2006), in the USA (Diamond 2005), in England (Paris 2006), in Wales (Pyne 1973 in Wallace *et al* 2005), in Sweden (Müller 2004), in Norway (Flognfeldt 2006) and in Turkey (Tamer *et al* 2006). The demand by nationals and, particularly, foreigners for second homes has increased considerably in the natural and cultural amenity rich countryside, especially in Alentejo and Algarve.<sup>7</sup> Here, second homes are often built in unsettled zones, usually Protected Natural Areas or in unique cultural landscapes.<sup>8</sup> While in the attractive cultural landscapes second home owners occupy restored old traditional houses, in the natural amenity-rich areas they choose

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<sup>7</sup> An indication of such demand is the great number of advertisements in daily and weekly newspapers.

<sup>8</sup> Indeed, a common trend in Southern Europe and Scandinavia is “a turn towards a more tourist validation of the second home, which implies a greater demand for second homes in scenic areas” (Müller 2004:249).

newly purpose-built houses usually within gated communities or integrated tourism resorts. This trend is also reported by Paris (2006:8): “Large fully-commodified second home developments... have become widespread in many European and North-American countries”.

### 1.2.6. Traditional resorts of Metropolitan Lisbon

This cluster comprises the city of Lisbon and nine suburban counties of its Metropolitan Area (figure 6). It is characterized by the lowest percentage of second homes (11.5%) and a low rate of their increase (16.8%) and, at the same time, by the highest share of second homes in multi-dwelling buildings (48.1%).

The assumption that second homes are mainly located in rural areas has been challenged by authors such as Hoogendoorn and Visser (2004) who argue that second homes might well be located in metropolitan areas.

The counties belonging to this cluster, with the exception of Lisbon, are traditional summer resorts. National and, particularly, foreign second home owners are concentrated mostly in the counties of Sintra and Cascais, attractive tourism destinations since the 19<sup>th</sup> Century. In recent decades, however, the growth of second homes did not follow the pace of first home expansion in the Lisbon Metropolitan Area due to accelerated suburbanisation. Also, probably most of second homes are not purchased for leisure and recreational purposes, but rather as a profitable investment (Paris 2006).



Fig. 4. Summer vacation resorts



Fig. 5. Natural and cultural amenity rich countryside



Fig. 6. Metropolitan Lisbon

### **1.2.7. Summarizing the findings**

Three quite distinct main types of Portuguese rural counties, where the expansion of second homes is significant, have emerged: (i) counties in the rural-urban fringe; (ii) counties in the depopulated countryside and (iii) counties in the natural and cultural amenity-rich countryside. The positive or negative impacts on land use and landscapes differ due to the diversity of the prevailing characteristics and dynamics of second home expansion within each cluster. Thus, every type of counties calls for specific field research aimed at integrating the findings in local land use and landscape planning. Second home owners should be considered important local development stakeholders since, although they do not vote in local elections, their contribution to local tax revenues is quite significant. In fact, in Portugal, second home owners are not temporarily exempt from property tax payments, like first home owners. Property taxes are the major source of income generated at the local level while the rest of financing is obtained from the central government through the transfer of resources. Other stakeholders related to second home expansion - local authorities, tourism operators, real estate agents, spatial development planners, local entrepreneurs, external potential tourism investors, among others - should participate in field research. The results of the survey on one of such stakeholders – local authorities - are presented in the following section.

## **2. Second home expansion in the Oeste Region, as perceived by local authorities**

Since late 2009, field research has been carried on in the Oeste Region (a NUTS III, NW of the Lisbon Metropolitan Area) as an in-depth case-study aimed at attaining the following objectives: (i) drawing upon the findings from the desk study, to compare and characterize the phenomenon of second home expansion at regional level; (ii) to determine the structural driving forces and the effects of second home expansion; (iii) to identify place-specific driving forces, as well as spatial and socio-economic effects of second home expansion, and (iv) to provide an insight of the interrelations of second home expansion and spatial planning policies and development in the municipalities of the Oeste region.

The Oeste is a region in rapid change, in the area of influence of Lisbon, characterized by a diversified and dynamic economy marked by a competitive agricultural production,

numerous small and medium-sized firms in the agro-business and ceramics industry, and a rapidly rising tourism sector, particularly of second home tourism. As a matter of fact, according to the last Population and Housing Census, in 2001 the share of second homes in the total number of dwellings was 25% in the Region (20% at national level) and in 1991-2001 their number grew 45% across the Region (40% at national level). In view of such high rate of growth, the Oeste has been considered, together with Algarve, a priority region for the development of second home tourism in the National Strategic Plan for Tourism (Roca et al, 2010). In the spatial typology described above 10 out of 14 counties of the Oeste Region fell into the “peri-urban fringe” type, two fit the “adjacent countryside” and two the “summer vacation resort” types.

The first step of the fieldwork consisted of interviewing the leaders and other responsible staff of the Parish Councils (parish is the lowest territorial-administrative unit in Portugal) of the Oeste Region, with the following main objectives (i) to identify localities with strong presence and/or growth of second homes in order to obtain a sample of different types of second home owners, to be interviewed subsequently; (ii) to find out about the geographical origin of second home owners; (iii) to determine the frequency of use, location, type, state and age of construction of houses and types of households belonging to second home owners; (iv) to learn about the possible economic, social, cultural and environmental effects of second home expansion.

Until the end of January 2011, interviews were held with representatives of 112 (92.6%) out of 121 Parish Councils. Almost half (44.6%), of these parishes are semi-rural, while 30.3% are rural and 25% urban. The obtained responses revealed that second home owners from the Lisbon Metropolitan Area (LMA) predominated in an overwhelming majority (79%) of the parishes across the Oeste Region (figure 7). In this context, and given that most parts of the region belong to the aforementioned “peri-urban fringe” (cluster type 1), the following section is focussed on the findings from the analysis of second home owners from LMA.

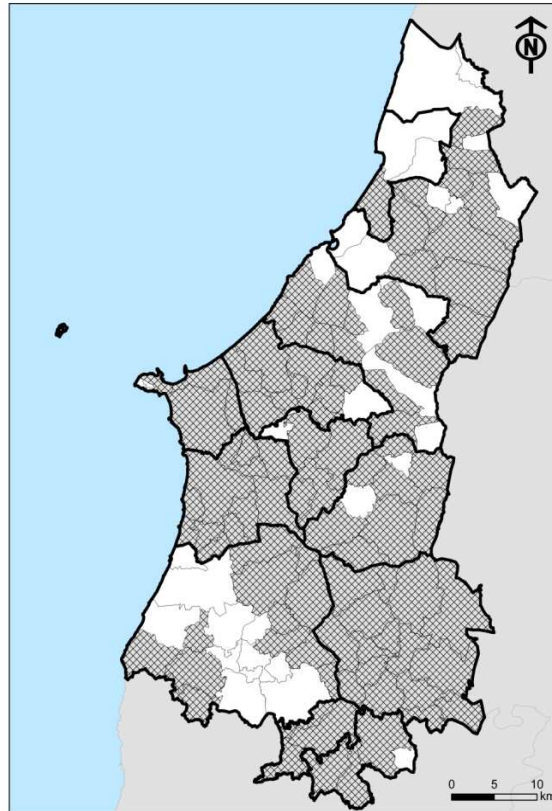


Fig. 7. Spatial distribution of second home owners from Lisbon Metropolitan Area

## 2.1. Second homes owned by LMA residents

Most respondents evaluated the expansion of second homes owned by LMA residents as “medium to strong”, “strong” or “very strong (49.5 %) (figure 8). In general, such trend can be interpreted as the result of a wide range of different factors, such as: (i) increase in living standards of the population, including the generalised use of private automobiles and, related to that, the contemporary development of a Weblenian “leisure urban class”<sup>9</sup> and of recreation-based lifestyles; (ii) intention of transforming the second home into primary home after retirement; (iii) the removal or inversion from everyday urban life; (iv) longing for the closeness to nature; (v) the desire to spend time with the family; (vi) investment in real estate; (vii) controlled vacation expenses; (viii) enhancement of social status in general (Hall and Müller 2004:12-14; Quinn 2004; Timothy 2004 and Kaltenborn 1998:123 in Quinn 2004). In particular, the expansion of second homes in the Oeste Region has been enabled by a significant decrease in travel-time and costs between the locations of second homes and permanent residence in the

<sup>9</sup> Weblen (1898) defended that the consumer can buy a product not for its intrinsic utility but as a sign of wealth and success (Peng, 2006).

LMA thanks to the expansion of the modern road network, thus improved accessibility. This has made possible for most LMA residents to use their second homes almost every weekend (58%) (figure 9). Such frequency is also possible because of most owners are still economically active, and their leisure time is predominantly over the weekends (see figure 11). Thus, the alternative use of first and second homes for work rather than for leisure and recreation, as appointed by Ericsson (2006), seems to be still quite incipient in the Oeste Region.

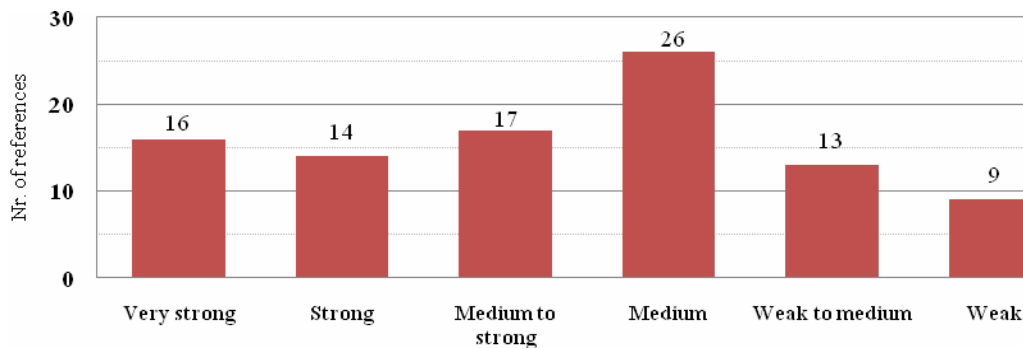


Fig. 8. Expansion of second homes owned by LMA permanent residents

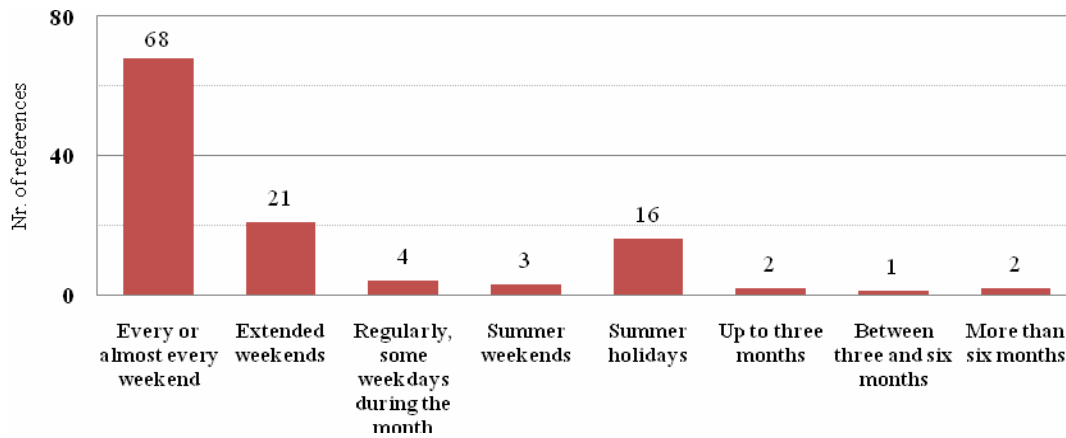


Fig. 9. Frequency of use of second homes by owners from LMA

The representatives of Parish Councils consider that second home owners from LMA have “medium to low” or “low” (51.1%) propensity to change the second into first home (figure 10). This probably has to do with the prevailing family structure of this type of second home owners, that is, economically active couples with or without children in school age (66.2%) (figure 11). The low level of propensity to change second into first homes can also be related to push factors in the Oeste Region. For example, there are still few alternative higher income employment opportunities that would suit the more educated second home owners to move to this region. In fact, it

seems that at this stage the strong expansion of second homes in the Oeste Region is a result of a growing rural gentrification (Hoogendoorn and Visser 2004) rather than of the first stage of urban sprawl. In the near future, however, the propensity to change the second into first home is likely to be higher when the post–World War II baby-boom generation start to retire.

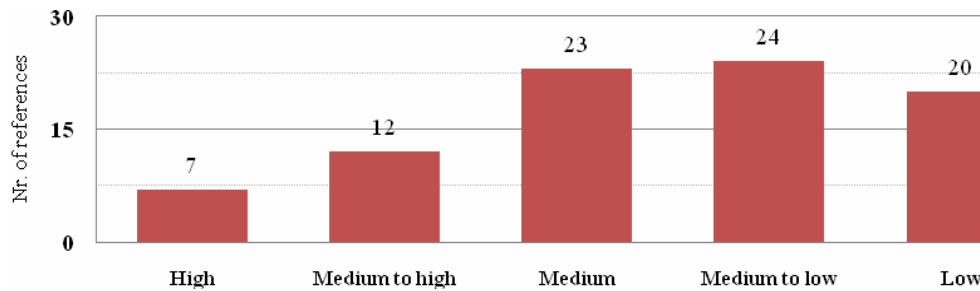


Fig. 10. Propensity to change the second into first home by owners from LMA

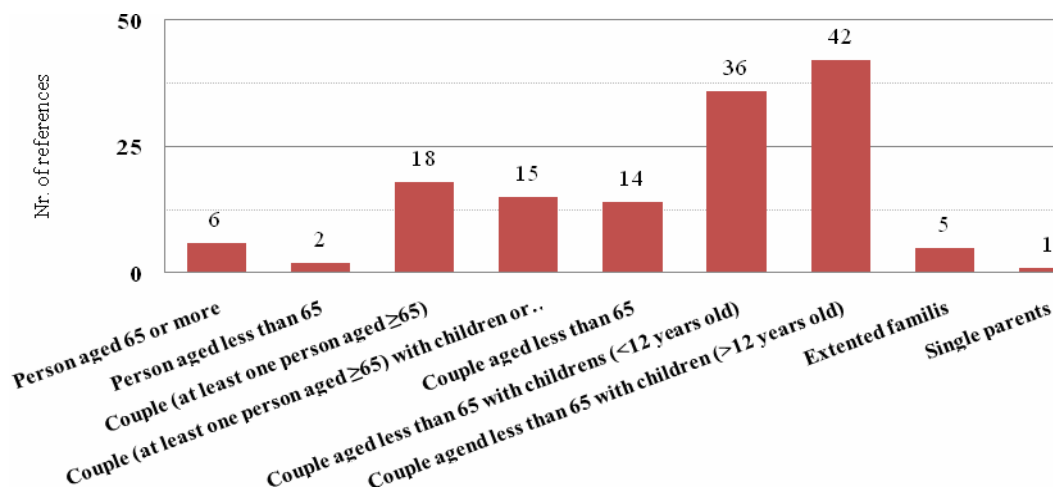


Fig. 11. Types of households of second home owners from LMA

The majority of LMA residents prefer to buy second homes located either in or outside rural agglomerations (68.3%), and prefer individual houses (70.7 %) (figure 12). Although second homes have been mostly dispersed in the peri-urban space, in recent years they now tend to be more concentrated in the light of the exigencies of most Municipal Master Plans that regulate urban land use, including second housing, which became effective in the 1990s. This tendency is reflected in the fact that in the countryside terraced houses are the second most frequent type of location. However, the presence of gated communities in the rural areas is still quite rare, thus the probability of rural landscapes becoming “elite landscapes” (Halseth, 1998) in the Oeste Region is still remote.

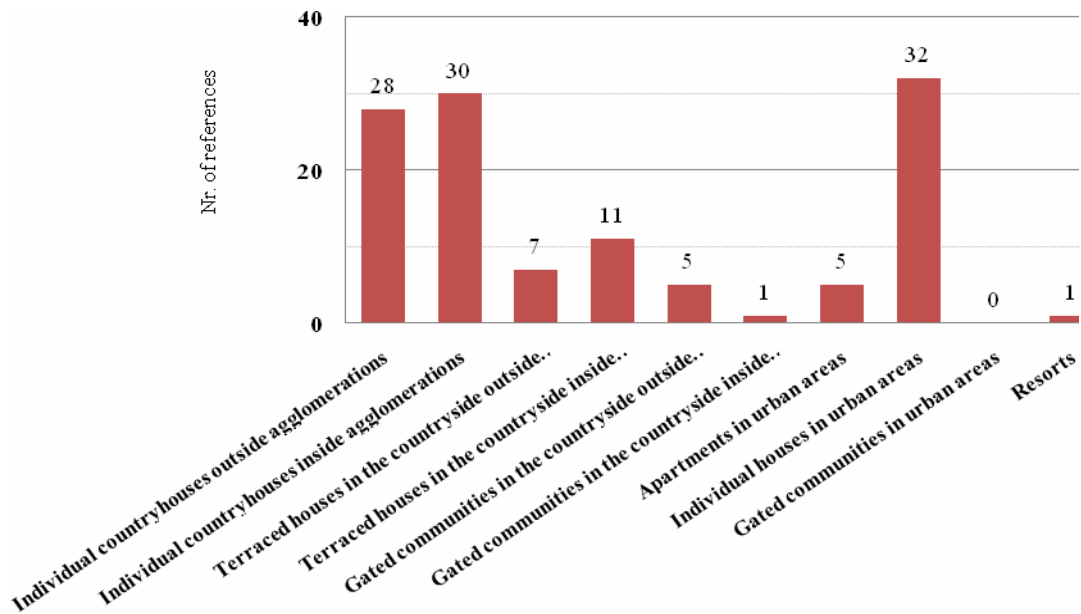


Fig. 12. Location of second homes by owners from LMA

In rural areas, second home owners from LMA prefer to live in old renovated country houses (62.3%) (figure13), while in urban areas they rather live in newly-built houses or apartments (50.7%). In fact, a vast literature has shown the important role of second home owners in the preservation of the built heritage of villages and hamlets. In Portugal, field research in the Lousã Mountain conducted by Mendonça (1999-2000) and by Dinis and Malta (2001) and in the rural municipality of Trancoso by Carvalho (2003) identified second home owners as the most important type of residents accountable for housing renewal.

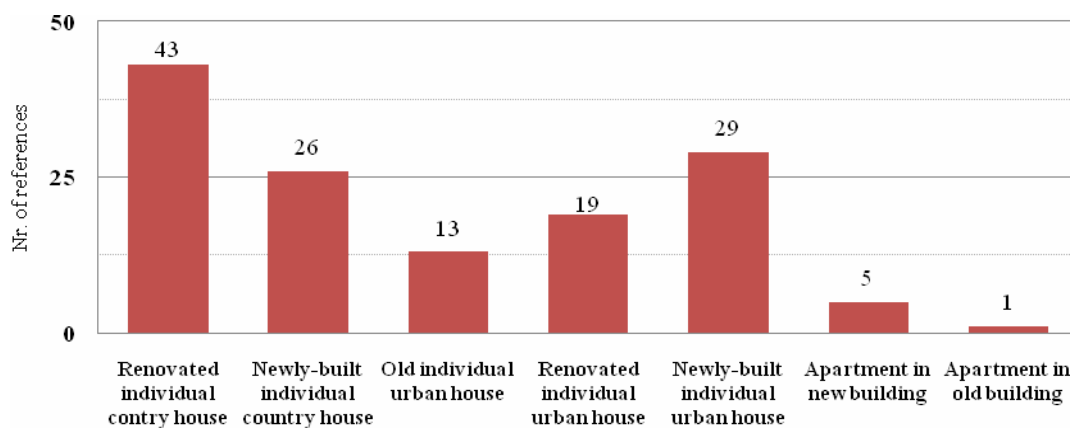


Fig. 13. Construction age and state of second homes owned by LMA permanent residents



## 2.2. The impacts of second home expansion

The respondents were also asked to deliberate on the environmental, social, economic and cultural impacts of second home expansion in the urban and rural areas of their parishes (figures 14 and 15).<sup>10</sup> Most interviewees gave concrete responses to the question on such impacts in rural areas, but did not know or did not answer anything on impacts in urban areas. The reason behind this reaction could be in the fact that the environmental, economic, social and cultural impacts of second home expansion are more visible or easy to perceive in rural areas than in urban. Also, since most parishes are classified as semi-rural or rural, the respondents are better aware of such impacts in the countryside than in urban nuclei.

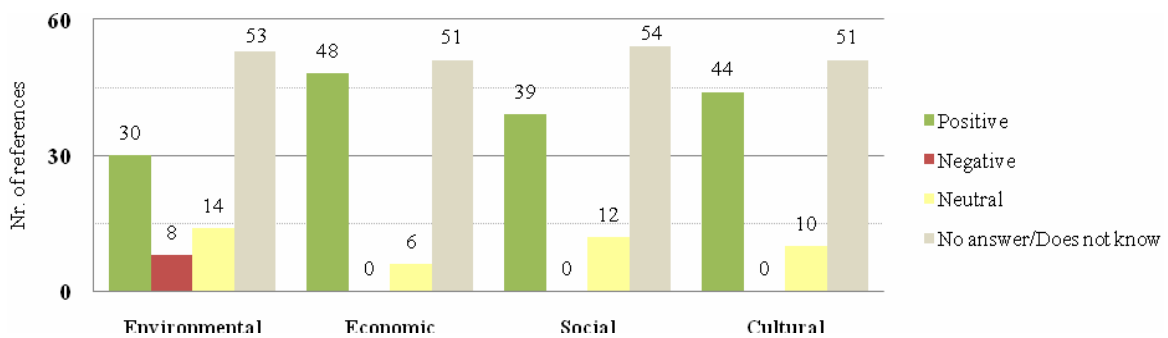


Fig. 14. Impacts of second homes located in urban areas

<sup>10</sup> Drawing on the four key components of territorial identity features, as suggested by in the Identerra Model (Roca and Roca, 2007; Oliveira et al., 2010), the following hypothetical range of impacts were presented to the interviewees: (i) environmental impacts - use of sanitation infrastructure, protection of flora and fauna, water and electricity consumption, wastewater treatment, solid waste collection and treatment; (ii) economic impacts - job creation, management of the urban and rural economy, use of social infrastructure, use of health services, road infrastructure, local commerce, products of local handicrafts, housing renewal, quality of life, tourism demand, consumption of local products, agricultural activity, municipal expenses and revenues; (iii) social impacts - neighborhood relations, citizens' participation in public life, social life, provision of public services, provision of recreation and entertainment, interaction with local residents, security, crime, rejuvenation of the population, aging of the population; (iv) cultural impacts - architectural styles, gardening style, local identity, revival of the historic centers, cultural innovations, preservation of the rural and urban landscapes, provision of cultural services, cultural and recreational events, beauty of the urban landscape; beauty of the countryside.

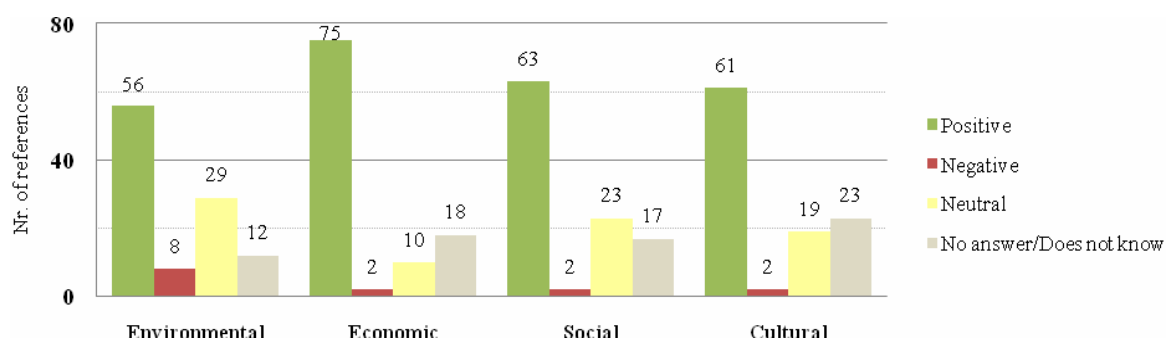


Fig. 15. Impacts of second homes located in rural areas

To clarify this issue, an additional analysis of the impacts was done separately for each type of parishes - rural, semi-rural and urban. It was found out that in the three types of parishes, in the case of the impacts on urban areas, the share of concrete responses, responses “do not know” and “no responses” was quite similar, while in the case of the impacts in rural areas the interviewees who responded on the issue of impacts clearly prevailed (figures 14 to 18). It seems that the answers on impacts by the local authorities are influenced by the higher visibility or higher degree of sensitivity to such phenomena in rural areas.

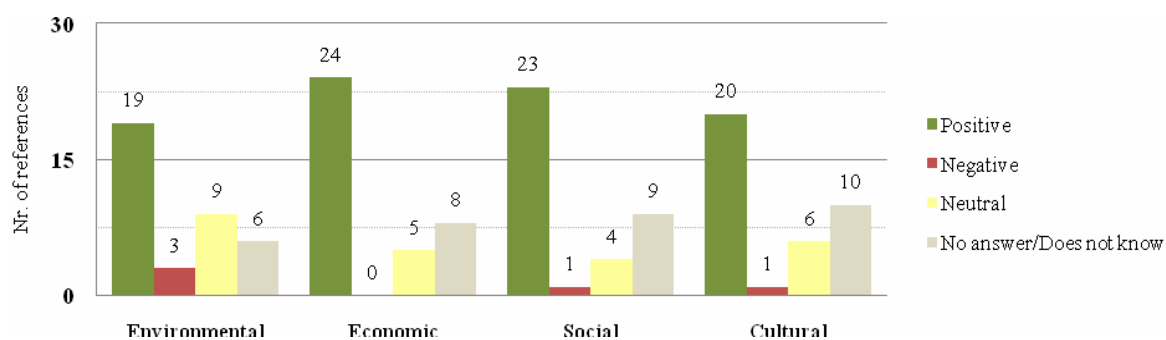


Fig. 16. Impacts of second homes in rural areas of rural parishes

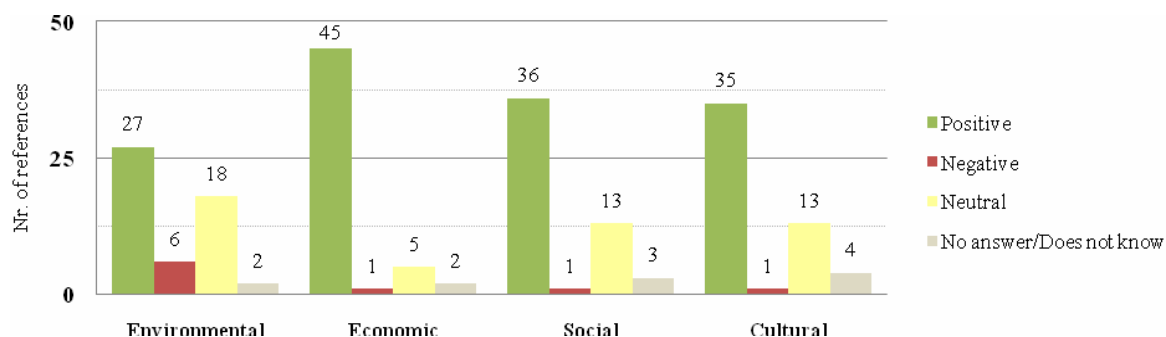


Fig. 17. Impacts of second homes in rural areas of semi-rural parishes

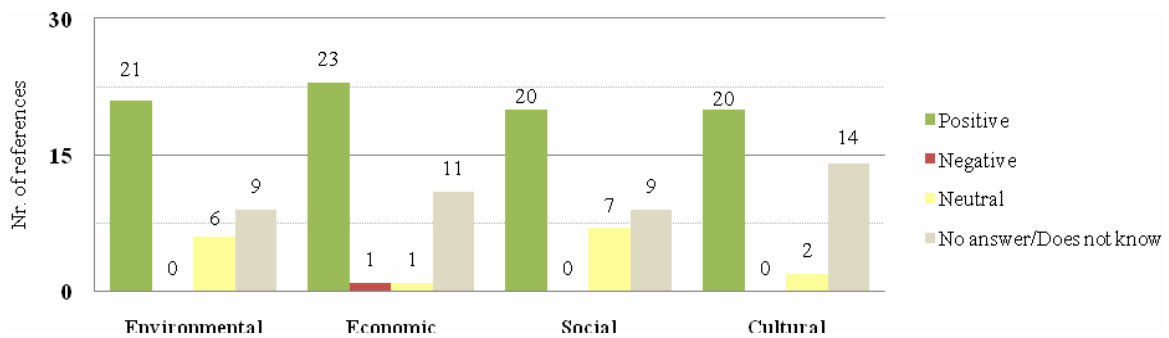


Fig. 18. Impacts of second homes in rural areas of urban parishes

Among the interviewees that evaluated the environmental, economic, social and cultural impacts of second home expansion in rural areas, the positive ones prevailed in all categories. In fact, according to Gallent and Tewdwr-Jones (2000: 51), the impacts of second home growth are “particularly linked to the types of dwelling used to this purpose”. Since most of the second homes in the parishes covered by the sample belong to the type of housing stock classified by the referred authors as “derelict and empty surplus dwellings”, that is, old country houses, their expansion provokes much less negative impacts than the other two types, i.e., new-build and mainstream housing stock.

The predominance of the positive environmental impacts is also supported by Muller et al (2004). They argue that second home owners are more environmentally friendly compared to other rural development stakeholders. Also Jones et al (2003 in McIntyre et al. 2006: 243) “provided evidence to suggest that second home owners are environmentally better informed and educated than the local population”. Correspondingly, Buller and Hoggart (1999 in Müller, 2004:22) stress that second home owners follow a “museum-strategy” of local development, that is, they aim to preserve the countryside as an artefact while local people choose the “home-strategy”, i.e., they wish to develop the countryside without alienating its single elements.

Concerning the prevalence of positive economic impacts of second homes, as Gallent et al. (2005:55) claim, second homes provide a flow of money supporting local economy. Other authors also point out that with longer stays, second home owners will more frequently purchase locally available consumable goods (Jacobs 1972; Archer 1973; Clout 1972 in Gallent et al. 2005:55). Likewise, in a literature review, Paris (2006: 7) argues that many second home owners favour expenditure within the local economy of their second home. However, for Gallent et al. (2005: 58) the positive economic impacts

exceed the negative ones only in areas where the “derelict and empty surplus dwelling” type of housing stock prevails and thus, the displacement of local residents is less probable to occur.

The highest frequency of positive social impacts, evidences that second home owners can also show a strong attachment to the place. Stewart and Stynes (2006) doing field research in the US Midwest and Stedman (2006) in Northern Wisconsin came to a similar conclusion. This could be expected since, as Muller (2000) points out, second home owners visit their second home regularly and thus, are closely attached to the second home area. Others may have family links to the place of the second home (Kaltenborn 1997).

Finally, the predominance of positive cultural impacts can partly find an explanation in Stoa’s assertion (2007:10) that “many second home owners lead a more active social life in the cottage village than they do in their urban home because working days tend to be too busy”.

### **In lieu of conclusion**

Findings of the desk research (cluster analysis) of second home expansion at the national level validated the initial statement that this phenomenon is an outstanding land use and landscape feature in most parts of Portugal. It was also verified that major spatial types of second home expansion, such as the rural-urban fringe, vacation resorts and the natural and cultural amenity rich countryside, are similar to those in other countries in Europe and beyond. However, a specificity that Portugal shares only with other Southern European countries is a much greater importance of second home expansion in depopulated areas that experienced strong out-migration and emigration.

While the expansion of second homes has marked practically all parts of the country, the spatial distribution of their physical features is uneven. Specifically, second homes in older one-dwelling buildings are much more frequent in the depopulated areas, while newly built second homes represent an important share of the second home stock in peri-urban areas, as well as in vacation resorts where they are frequently in multi-storey buildings. Each spatial type of second home expansion corresponds to a specific type of second home owner. Out-migrants and emigrants predominate in the depopulated countryside and some of them will probably move to these areas after retirement.

However, because of its cultural and landscape value, the depopulated countryside has also increasingly attracted urbanites, including foreigners, with no previous bonds with these areas, in search of the 'rural idyll'. At the same time, Portuguese and foreign owners of elite second homes have been major consumers of recreational and tourist spaces, in the rural-urban fringe, vacation resorts and natural and cultural amenity rich countryside. Many have chosen to buy second homes in gated communities, or within multi-purpose tourism developments. In this context, and recalling Hall and Müller (2004), second home owners in Portugal have become either creators of elite landscapes, or guardians of traditional rural landscapes.

The field research in the Oeste Region, which mostly belongs to the "peri-urban fringe" spatial type, revealed that in the strong expansion of second homes the majority of owners are residents of from LMA, among which couples in active age dominate, who frequently spend their weekends in the second homes and are not likely to convert them into first homes in the near future and prefer to enjoy individual, renovated old houses in the countryside. The latter finding can partly explain why the suggested positive impacts of second home expansion in the rural areas clearly outstrip the negative ones, particularly in view of the fact that most of the houses converted to second homes are the derelict and/or empty surplus housing stock, as referred to Gallent et al. (2005). Also, in the light of the fact that the countryside of the Oeste Region has a declining and aged, mostly agricultural population, local authorities can easily perceive the impacts of such phenomenon in rural areas as mostly positive, since they look forward to the external forces that could compensate such negative demographic trends.

In this context, if the Coppock's question - "are second homes a curse, or blessing?" (1977) was posed to the local authorities of the Oeste Region, their response would be easy to guess. However, further in-depth research that should include other development stakeholders in the region, such as development associations, non-government organizations, particularly those concerned with the natural environment, is needed in order to shed more light to this dilemma, as well as to open new ones regarding the multiple linkages between land use and changing lifestyles patterns.

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