

Considerations About the Economic Sustainability of Historic Housing Tourism



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Abstract The methodology of data collection and analysis used in this study was Grounded Theory (GT). Its methods allowed the generation of a theory that emerged from the action that took place in the substantive area of HHT. GT has the advantage of not being restricted to one unit of analysis, since the categories that emanate from the data are generalizable. In this way, GT allows for the development of theory grounded in the data collected. Our sample for this study consisted of 53 interviews with owners and/or hosts of HHT and five participant observations held in the substantive area of HHT.

This chapter aims to explain the strategies used by the hosts or owners of manor houses to ensure the self-sustainability of the HHT. The research findings presented here should be regarded as an integrated set of conceptual hypotheses (i.e., probabilistic assertions) that intend to explain a substantial part of the behavioral patterns apprehended in the manor houses.

1 Introduction

Tourism has been the engine of economic growth in Portugal in recent years. In 2019, tourism in Portugal provided 1.047 million jobs, which is equivalent to 21.8% of total employment (PRESSTUR, 2019). Furthermore, it represents about 14.6% of the national GDP (TravelBI, 2019). Portugal is the fourth country according to the World Travel & Tourism Council (WTCC), with the highest rate of wealth generation by tourism (WEF, 2018). The increase of tourism activity in Portugal in recent years was due, among other factors, to the power of initiative of entrepreneurs and

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the natural conditions offered by the territory (Moreira, 2018). Lately, there has been international recognition of Portugal's attractiveness as a tourist destination. Hence this destination was distinguished in the World Travel Awards 2019, for the third consecutive year, and in the 11th edition of the Marketeer Awards. Moreover, in the World Golf Awards 2018, Portugal earned recognition as the best World and European golf destination. In Portugal, there are three regions where tourism has experienced significant development: Lisbon, Algarve, and Madeira.

The success of a tourist destination depends on its ability to meet the needs and preferences of tourists. Tourist needs are globally identified in the literature and substantiated in the look for new experiences and knowledge, rest and relaxation, and in the search for leisure activities, among others (Simková & Holzner, 2014; Wong et al., 2013). According to Mahika (2011), tourists are also moved by the desire to meet new places, people, cultivate new friendships, or strengthen personal relationships. The destination Porto and North of Portugal is characterized by a multiproduct offering, targeted at different market segments, in line with the National Strategic Plan for Tourism (Ministério da Economia e da Inovação, 2007) and the Action Plan for Tourism Development in Northern Portugal (Comissão de Coordenação e Desenvolvimento Regional do Norte-CCDRN, 2011). As regards the strategic guidelines relating to tourism products and differentiating attributes, the abovementioned destination decided to develop the following segments: (i) urban tourism; (ii) city breaks; (iii) business tourism; (iv) cultural tourism, events, scientific tourism, food and wine, touring and cultural landscape; (v) natural tourism, health, and wellness; (vi) nature tourism; and (vii) religious tourism.

The Strategic Plan of Tourism of Portugal, "Estratégia 2027," states as one of its strategic challenges to ensure the preservation and sustainable economic enhancement of cultural and natural heritage and of local identity.

Historic Housing Tourism (HHT) fits perfectly with the strategic vision of Turismo de Portugal since it is a type of tourism that aims at the recovery of manor houses (Pereiro, 2018). Moreover, this tourism product also includes the immersion in the history and culture of the house's surroundings through the family that owns it (Pereiro, 2009).

The methodology of data collection and analysis used in this study was Grounded Theory (GT). Its methods allowed the generation of a theory that emerged from the action that took place in the substantive area of HHT. GT has the advantage of not being restricted to one unit of analysis, since the categories that emanate from the data are generalizable. In this way, GT allows for the development of theory grounded in the data collected. Our sample consisted of 53 interviews with owners and/or hosts of HHT and five participant observations held in the substantive area of HHT.

This chapter aims to explain the strategies used by the hosts or owners of manor houses to ensure the self-sustainability of the HHT. Likewise, the research results presented here should be regarded as an integrated set of conceptual hypotheses (i.e., probabilistic assertions) that intend to explain a substantial part of the behavioral patterns apprehended in the manor houses (Braga, 2016).

This chapter is divided into six sections. Initially, the pandemic crisis and its impact on tourism are addressed. The opportunities that COVID-19 can bring and the need to focus on more sustainable, more informal forms of tourism, in which HHT is included, and that can contribute to the integrated development of tourism are also addressed. Next, a characterization of heritage tourism is made, in which HHT is inserted as a distinctive tourist product. In turn, the methods section and the research findings are explained in detail in Sects. 4 and 5. Finally, a model is devised to explain the problems faced and the solutions found by the hosts and owners of manor houses when trying to ensure the self-sustainability of the HHT.

2 Tourism and Sustainability in Times of Uncertainty

The pandemic effects caused by COVID-19 are having impact on the development of tourism activities worldwide (Gössling et al., 2021). Although many travel and tourism companies are used to include risk management and assessment models in their business planning, like it is stated in Ural (2015) and Ritchie and Jiang (2019), the nature of this pandemic has put these models under strain as their impacts manifest themselves on a global scale. Measures to contain and restrict the mobility of citizens have resulted in a significant reduction in tourism demand, especially in international travel, with massive flight cancellations by the world's leading airlines. According to Horta (2020), Portugal is one of the European countries where a strong reduction in tourism activity is expected, with a forecast of more than 40% decrease in the number of visitors. These values of economic contraction in tourism are only surpassed by Italy and Spain.

This strong impact on international tourism, whose real economic and social effects are still far from being accounted for, materialized in major crashes in commercial aviation, closed hotels, and businesses. These have resulted in heavy losses and large-scale unemployment (ILO, 2020). This panorama is worrying and has an impact on all economies. However, its effect will be potentially greater in countries with a small internal market and where foreign dependence is higher. Tourism is extremely important for Portugal as it is indicated in the studies conducted by Bento (2016) and Oliveira (2014).

Currently, there is a worldwide consensus that tourism is a key strategic axis for the sustained development of the territory. Portugal has been nominated in recent weeks as a destination of choice for living in the post COVID-19 period (Responsible Tourism, 2020).

Tourists are expected to bring new hygiene and sanitization demands, which causes tourism agents to have to implement clean and safety measures. This is intended to strengthen Portugal's image as a safe destination that has been able to adapt quickly to these new times. It is expected that tourists' priorities may change and that there will be greater demand for alternative destinations, where they can have unique experiences and where quality prevails over quantity. Destinations where there is a demand for social and environmental sustainability, with more

nature and fewer crowds. With this in mind, small hotel units and resorts with a familiar approach, may become the most sought-after products by tourists in the post COVID-19 era. This opens a window of opportunity for the emergence of underexploited tourist sites, in areas like the countryside and peripheral regions. This could also be beneficial in combating the desertification certain regions of the country endure and reducing the social asymmetries between the coast and the interior of Portugal. In recent years, Portugal has attracted an increasing number of elderly people from Northern and Central Europe, who seek to live in this country for the remaining years of their lives. According to Lopes et al. (2020), key reasons for this choice are weather conditions and the existence of a good private health system that offers good conditions for a person to retire. Considering that this segment of the population is one of the most affected by COVID-19, the incentives to move to a safe and comfortable country in the last years of life are even greater. Another identified opportunity is the digitalization of tourist operations. The strong role of information technologies and alternative payment methods in the growth of tourism activity and in attracting new audiences is recognized (Almeida et al., 2019). Tour operators should accelerate these digitization processes and promote the establishment of distance businesses and the adoption of new digital platforms (e.g., social networks and virtual congresses) that allow the formalization of distance businesses and greater diversification of tourism promotion.

3 Heritage and Tourism

Heritage tourism dates back to ancient times. It is the oldest mode of tourism. There are documentary records alluding to the travels of merchants, sailors, and adventurers to visit the Great Pyramids and the Nile River. According to Timothy and Boyd (2003), these early explorers were among the first tourists. Centuries later, in the mid of the Middle Ages, there was a displacement of people who went to places where ancient remnants of culture lay. There they encountered great buildings, cathedrals, and works of art.

In the early modern period, the Grand Tour found adherents among the privileged classes. In the sixteenth and seventeenth centuries, this experience—which included visits to historic cities such as Paris, Milan, Venice, Florence, Rome, and Naples—was considered a cultural and educational enhancement (Goethe, 2018). The pioneers of this type of travel were the English, generally belonging to the landed gentry. However, by the late 1800s, this circuit was popular among lawyers, doctors, bankers, and merchants (Boyer, 2003; Roberts & Hall, 2001; Timothy, 2021). Even today, many of the towns that were part of this itinerary are still highly sought after for cultural and heritage tourism.

The terms “cultural tourism,” “heritage tourism,” “ethnic tourism,” and “art tourism”—according to Timothy and Boyd (2003)—are used almost interchangeably, with no agreement as to their meaning.

In fact, cultural tourism goes beyond the mere visit to monuments or places to encompass the consumption of the way of life of the places visited. Thus, this activity brings together cultural products and contemporary culture, incorporating both heritage tourism (related to artifacts of the past) and art tourism (associated with contemporary cultural production).

Heritage tourism can also be regarded as an activity focused on what has been inherited, whether historic buildings, works of art, or stunning landscapes. According to Timothy (2021) heritage is “what we inherit from the past and use in the present day” (p. 3). This market segment can also be defined as the economic activity that uses sociocultural heritage resources to attract visitors. Thus, heritage tourism includes folk traditions, arts and crafts, ethnic history, social customs, and cultural celebrations (Chhabra, Healy & Sills, Chhabra et al., 2003).

Poria et al. (2003) distinguished two main approaches to this phenomenon:

1. View it as tourism in places considered as heritage or historical. This is the most common approach and establishes as a minimum condition the presence of tourists.
2. Another point of view emphasizes the connection between the elements of the place and the phenomenon. In this case, the role of history is emphasized as being an integral part of the experience and this area of knowledge is associated, in part, with the motivations for travel.

The same authors emphasize the importance of demand in defining this type of tourism, rather than the nature of the artifacts displayed. Therefore, according to them, this market segment should not include tourists who find themselves in certain places because they have been declared heritage resources by experts or stakeholders. Therefore, heritage tourism is a market niche in which the main motivation to visit lies in the uniqueness of the place, given the tourists’ perception of their own heritage. This type of tourism, then, stems from the relationship between supply and demand. It is not only about attributes, but, above all, about the perceptions related to them.

On the other hand, Zeppal and Hall (as cited in Chhabra et al., 2003) also emphasize motivation and see heritage tourism as being based on nostalgia and the desire to experience different cultural forms and landscapes. Thus, on the demand side, this activity embodies the desire of many contemporary tourists to experience and consume in situ various cultural landscapes—past or present—performances, delicacies, crafts, and performed activities. In effect, heritage tourists are well-educated, since education can spur people’s interest in witnessing historical sites and attending cultural events (Timothy, 2021). On the supply side, this type of tourism is widely regarded as a tool for economic development and is often actively promoted by local governments and private activities.

For Waitt (2000), the demand for heritage tourism is due to several factors:

An increasing awareness of heritage, an ability to express individuality through recognition of historical environment or staged history, greater affluence, increased leisure time, mobility, access to the arts, the need to transcend contemporary experiences to compensate for

Table 1 Differences between the tourism sector and the cultural sector

	Cultural sector	Tourist sector
Actors	Public sector and third sector	Private sector
Primary end	Search for social benefits	Search for economic benefits
Basic management activity	They try to protect it and spread it	They try to market it
Values assigned	Symbolic value	Use value (increases the attractiveness of a destination)
Recipients	End consumer	Tourist
Motivation	Intellectual enjoyment, learning entertainment	Leisure
Main attractions of the assets	Cultural value, exclusivity, beauty, uniqueness	Convenience, simplicity, distance, time

Source: Pulido Fernández et al. (2013)

their deficiencies and demands, and/or to fulfill psychological needs for continuity through an appreciation of personal family history (p. 838).

In addition, heritage tourism has the capability to increase appreciation of the past and to galvanize connections between past, present, and future—an increasingly challenging endeavor in a rapidly changing world.

Heritage assets are generally nonrenewable and irreplaceable, requiring maintenance and conservation. In this context, tourism has been seen both as an opportunity and as a threat to heritage. In this respect, Table 1 shows the differences between the tourism sector and the cultural sector.

If there is an excessive valorization of the economic aspects linked to the development of the activity, this may result in a devaluation and demoralization of the social and cultural values of heritage (Pulido Fernández et al., 2013). Nevertheless, heritage is not an immutable resource, due to its limited, nonrenewable, or non-replicable character. Both tourism and heritage need to be considered as a process and performance, as they are subject to incessant negotiation and renegotiation in the local and global contexts (Park, 2014).

Timothy and Boyd (2003) warn about the current trend of having an oversupply of heritage resources, without, however, questioning the role of heritage as an indispensable tool to bring tourism to urban and rural areas in rapid decline, regenerating them.

Indeed, heritage tourism is closely linked to the experience of cultural assets, both material (tangible) and socio-psychological (intangible) of the national or local past (Timothy, 2021). This segment of tourism is above all unrelated to the valorization of a hegemonic mode of reconstruction and reinterpretation of collective memory. Rather, it favors ways for individuals to position themselves in the broader context of cultural construction and symbolic embodiment of national identity (Timothy & Boyd, 2003).

3.1 *Historic Housing Tourism*

In Portugal, Historic Housing Tourism (HHT) is defined by Decree-Law No. 80/2017, Article 17, as “family-run businesses set up in old private properties that are representative of a particular era due to their architectural, historical, or artistic value, namely palaces and manor houses, and can be located in rural or urban areas.”

According to Pina (1988), HHT was introduced in Portugal long after it had been established abroad, namely in Austria, Germany, France, England, or Switzerland. From the beginning, HHT had a strong implantation in the north of the country (Pina, 1988; Bote Gómez, 2001[1988]). This new tourist product, as Pina (1988) calls it, brought together the allure of a humanized and refined lodging and the taste of the privileged and informal conviviality of the outsider with a traditional Portuguese family nucleus, inserted in its genuine sociocultural atmosphere (p. 190).

According to Edwards and Fernandes (1999), HHT was initially promoted in Germany, Scandinavia, and the United Kingdom, with room prices being equal to or higher than four-star hotels. At a conceptual level, this accommodation was sought to be distinguished from British bed and breakfast, as HHT guests were often privileged to stay in stately homes, along with family members who often were the descendants of the mansion’s founders.

In Portugal, HHT started as an experience in 1978 under the vernacular designation of *Turismo de Habitação*. Its creation was aimed at: (1) Reducing the disparity between Portuguese inland and coastal regions, and (2) Offering differentiated hotel capacity in areas where it was scarce (Braga & Dionísio, 2021a).

In an extremely simplified way, we can argue that the HHT provides a stay in a manor house, as well as the cohabitation and socializing with the owners of the house. The latter is also assumed as a repository of national and regional identity. However, HHT is distinguished from Rural Tourism (RT), since it is a manifestation of cultural tourism that occurs mainly in rural areas. At HHT, the cultural product is essentially the accommodation in a house of classical architecture. In other words, this type of offer values the eminently rural geographical situation of the house, its historical heritage, and its small size, which influences the way in which the reception takes place. The service at HHT is “always personalized, unprofessional, domestic and familiar” (Cavaco, 1999, p. 294).

HHT can contemplate recreation complementary activities such as hunting and fishing, sailing, riding, visits, and tours or even activities like those that usually happen in swimming pools or tennis courts attached to the house (Cavaco, 1999; Silva, 2010). Additionally, the owners can also complement their income with the lodging modality by organizing parallel events: renting of spaces for parties, weddings, christenings, conferences, among others.

HHT has been contributing to restoring countless houses of erudite heritage, contributing to the “return to the origins” of countless families once installed in urban areas and for the emergence of new types of tourism in rural areas. In addition, together with RT, HHT has contributed to the diversification of the tourist offer; the

reduction of seasonality; cooperation between local actors; the improvement of tourism animation projects; and the provision of services that support tourism activities.

However, HHT has proved disappointing relative to the expectations of farmers and with little impact on rural areas, except perhaps for viticulture. Rural employment has hardly benefited from tourism. In addition, the business has been accused of being elitist and of spending public funds inappropriately—particularly, financial nonrepayable support received by the hosts to preserve their properties and start HHT businesses (Silva, 2005–2006).

Silva (2009), in turn, confirms the scarce relevance of the number of jobs directly generated in the country by the sector. Much of the rural tourism units employ only one or two permanent workers, and some do not hire any permanent workers. This is also the case with seasonal and part-time workers. As regards the latter, it is observed that most establishments hire only one worker. Furthermore, a significant portion of HHT staff tends to be multitasking, being primarily assigned to the family household and secondarily to tourist business. Most staff are female, undertaking to perform gardening cores, cleaning and maintaining rooms, serving breakfasts, and responding to customer queries by telephone, among other duties.

HHT also contributes to the preservation of traditional gastronomy as hospitality units offering catering services are required by law to include national and local dishes in their menu. Therefore, the advantages of this sector are rather symbolic than economic (Braga & Sousa, 2021).

HHT is performed in manor houses—some of them dating back to the fifteenth and sixteenth centuries—which requires a big effort from the owners to preserve their original character. The HHT also conveys an ideology of the authentic and the singular. In other words, the success of the concept lies in the fact that it consubstantiates an alternative form of tourism, contrary to urban and sun, sea, and sand tourism massification, and enhances unique destinations driven by the pastoral-style ideas of returning to the countryside, but, essentially, by the exaltation of the singular and nonreplicable character of places and houses.

HHT hosts, in Portugal, are often members of the provincial elites, so they come from rural areas and originate from the place to which the manor house belongs. Sometimes, they are not only the owners of the house, but also of other buildings and agricultural lands that they operate in a heterogeneous way and which have been inherited. According to Cavaco (1999), the promoters of HHT are holders of high cultural and economic indices, and they dedicate themselves mainly to professional activities from the tertiary sector. They are businessmen, liberal professionals, managers, administrators, and senior public officers, although it is not uncommon that they are linked to agriculture and livestock. HHT units are often owned and operated by only one individual who, very often, assures their functioning. Nevertheless, family societies represent a form of property present in a significant number of houses.

The reason they became hosts was the recovery and profitability of properties obtained by inheritance. Therefore, HHT can offer a source of supplementary

income to retired hosts or owners who are mainly engaged in agriculture or even young members of the family without permanent employment (Lorente et al., 2020).

One of the greatest motivations of tourists who choose HHT is to revisit the past, choose buildings that appeal to a sense of time travel and the experience of tradition, thus escaping the routine of modern life. These tourists also wish to have an in-depth knowledge of the country. The standard customer for this type of accommodation is the urban couple with a medium-to-high income, cultured, and with some interest or curiosity for traditional lifestyles (Pereiro, 2018). These individuals belong mostly to the middle and upper classes and choose alternative activities to mass tourism. The main reason for the choice of manor houses is their location and the quality–price ratio (Lemos & Farhangmehr, 2007). In fact, the location of the house is relevant for tourists who seek this type of accommodation to be in close contact with nature where they can practice outdoor activities. Tourists also favor the contact with the local population, both the owners and the employees.

HHT is an option for those who want to avoid the most popular and competitive tourist destinations. In this case, it is the adoption of a social differentiation strategy. Thus, those who select this type of tourism believe they will benefit from a more enriching, edifying, and authentic tourist experience than those who choose mass tourism. These HHT regulars can be considered anti-tourists since they deny their condition (Silva & Prista, 2016).

Demand, of course, varies according to the time of year. Three periods can be identified. The high season, from June to August, with a peak occupation in the latter month. Notwithstanding, this season, according to Cánoves et al. (2004), extends for about 12–14 weeks, and includes September. An extensive low season, from September to March, but with some busy periods, particularly, at the end of the year and during Carnival. Finally, a short intermediate season, which occurs from April to June (Silva, 2009).

4 Methods

The results of the present study emerged from the application of GT methods to the substantive area of HHT (Braga, 2016). GT comprises a set of methodological phases (Scott, 2009): (1) identification of the substantive area of the study; (2) collection of data relating to the substantive area; (3) open coding of the data as we collect it; (4) writing memos throughout the process; (5) selective coding and theoretical sampling; (6) sorting to find the theoretical code(s) that best organize the substantive codes; (7) reading and integrating literature into our theory through selective coding; and (8) Theoretical Writing.

Each of these phases of the HHT study will be addressed in detail below, in ascending order:

(1) HHT is the area of interest of the study (Braga & Silva, 2021). The current research focused on the perspective of hosts and/or owners of manors (substantive population), which have been converted into HHT enterprises.

(2) GT's principle that "all is data" (Glaser, 2001) means that data can be legitimately collected from any source. Possible primary sources include interviews, observation, and field notes. Among the secondary sources are any documents produced by institutions or by persons who participate in the study (textbooks, press releases, promotional brochures, newspapers, letters, websites, blogs, photographs, videos, etc.) that may be of investigative interest (Castellanos-Verdugo et al., 2010). In addition, this methodology enables the combination and integration of the various sources. The HHT GT used qualitative data from participant observation (5 sessions) and unstructured interviews (48 in person, 3 by telephone, and 2 by e-mail). Regarding the geographical location of the houses, the vast majority are in the old province of Minho (34). In contrast, a small number can be found in the former provinces Douro Litoral (4), in Trás-os-Montes and Alto Douro (3), Beira Litoral (4), Beira Alta (1), Ribatejo (1), Alto Alentejo (2), Baixo Alentejo (3), Algarve (1) and Azores (2). The interviews were based on two neutral questions of the grand tour type: (a) *can you please tell me about your experience as owner and host of the house X?* (b) *How do you feel as a host?* The purpose of these questions was to instigate the loquacity of the hosts or as Glaser (2001) refers to "instill the spill."

(3) The field notes of the participating observations and of unstructured interviews were expanded in the Word processor. Then, line-by-line coding was employed asking the following questions to the incidents (Glaser, 1998): (a) *what category does this incident indicate?* (b) *what property of a category does this incident indicate?* (c) *what is the main concern of the participant?* Code assignment was conducted by using the Word processor's "comment" functionality. At the end of the open coding, followed the constant comparative analysis method (Glaser & Strauss, 2017[1967]). In this context, the identified incidents were "copied" and "pasted" into a new Word document under the appropriate substantive code title. Then, through the "highlight" feature of the Word, incidents were suppressed and only the codes were left visible. This mechanism makes the comparison of codes be easier. Next, we expanded the codes to see the incidents and thereby make the comparison of incident to incident within a code be easier. After that, we compared incidents through codes.

(4) Then, we wrote memos about the codes and about their relationships with other codes by creating a separate document (Scott, 2009). GT is an iterative process, so we analyzed each interview before we started the next one. At this stage, our analytical attention focused on the behavior of HHT house hosts in response to guest actions to distinguish guest and host properties. During the open coding phase, we aimed to interview as many hosts as possible. So, at this stage, we completed 25 interviews.

(5) After analyzing the field notes—those regarding the interviews and the participant observations we conducted—and the ideas we wrote down in the memos on the concepts and their interrelations, we deduced where the next interviews would take place (therefore applying theoretical sampling). Hence, the questions that were previously descriptive became more specific to collect data and saturate the missing categories. At this stage, we confronted the hosts with sensitive

information, removed the testimonies delivered by other hosts, and asked them: (a) *some people told me that. . .*; (b) *can you tell me about. . .?* (Braga, 2016). Thus, we improved our theoretical sampling, to theoretically saturate the categories. When we identified the core category and the main concern, the open coding ceased and the selective coding began, which only regard the core variable and the related categories (Scott, 2009). Therefore, the purpose of this first phase of the GT was to identify the main concern of the hosts and how they solved it. We realized that the main concern of the hosts was to preserve the history and the family connection to the HHT house and the way to resolve this concern was by “refunctionalizing” the manor house. This was the moment we started coding selectively for the core variable “refunctionalizing” (Braga & Sousa, 2021) as we believed it might interconnect all the main concerns of the participants. So, we stopped coding in a neutral way and only did it for the “refunctionalizing” code.

(6) Theoretical codes conceive how substantive codes can relate to each other as hypotheses to be integrated into theory (Glaser, 2005). Sorting literally involves distributing memos in conceptual piles. Sorting an important number of memos in an integrated theory is the culmination of months of conceptual elaboration. Sorting by theoretical codes enabled us to relate categories and their properties “into an integrated theory around a core category” (Glaser, 1992, p. 80). Our effort to classify resulted in a combination of theoretical codes: (a) a basic social process: “refunctionalize” composed of two stages (“improvising” and “professionalizing”); (b) a typology of hosts (“dedicated,” “undedicated,” “lineage,” “by acquisition,” “initiator,” “continuous,” “professional,” “manipulative”); (c) three styles of refunctionalization (“classic,” “hybrid,” and “modern”); (d) an amplifying causal looping (Braga & Silva, 2022).

(7) In GT, the literature review is perceived as a source of additional data to be compared with existing data, so we integrated it into the constant comparative analysis process when the core category, its properties and the related categories emerged, and the basic conceptual development was already emerging.

(8) In the writing phase, we wrote the piles of memos obtained in (6) in the form of a coherent text (Braga & Silva, 2022).

5 Results

HHT is the solution found by the owners to preserve the manor house, thus avoiding selling, or degrading it. HHT does not seem to aim at profitability, since fixed charges are high, and the size of houses is small (Braga, 2016). Above all, it is intended to achieve self-sustainability which will make it possible to strengthen a financial structure that enables the recovery of the property.

Nevertheless, HHT can be economically unsustainable if the host does not devote enough time to the activity (Braga & Dionísio, 2021b).

In addition, HHT is a way to ensure a constant investment without the owner having to employ his own capital. If the house is self-sustaining, the income from

HHT can cover the fixed costs. However, economic sustainability needs to be increased to support the ongoing recovery that the house needs. Thus, HHT must be self-sustaining, therefore, equity should only be used if it is mandatory to make intensive recoveries that cannot be borne by HHT revenue.

In short, the owners' main concern seems not to be profit, but rather passing on the house in better condition to the next generation of the family (Braga, 2016).

In the first phase of implementation of HHT, which we called improvisation (Braga & Sousa, 2021), the capital with payment facilities, provided by the political structure, was considerable, so the pressure on the economic sustainability of the house was not so high.

In the next phase, the professionalization phase (Braga & Sousa, 2021), a negative financial structure will lead to less advantageous financing conditions and cause a slowdown in the pace of recovery of the manor house or a decrease in its intensity. This will, in turn, result in a lower economic sustainability of the house, as the recovery costs will be high, and the accommodation offer will be less satisfactory for the guest due to the accentuated degradation of the building (Braga & Dionísio, 2021b).

Thus, some houses can achieve self-sustainability and others are chronically unsustainable except in the period of high guest inflow. If the HHT is not self-sustainable, the owner will have to recover the house using equity. In fact, there are hosts who cannot stand the unpredictability of the market and end up with the HHT.

To raise sustainability, houses do their best to reduce fixed costs. Deferring non-priority expenses is one way they do this. Other means used are reducing the houses' visibility charges, or opting for free visibility, or even reducing travelling expenses from the house elsewhere.

In fact, HHT allows the political structure to renew the built heritage in low-density territories. In turn, for the owners, it allows them to solve problems related to the usefulness of house preservation, at a time when the traditional agricultural function of the property is no longer profitable (Lorente et al., 2020).

The continuity of the manor house presupposes that the descendants have sufficient equity for the maintenance of the property or that they endow it with a viable exploitation model from the point of view of its economic sustainability. Nevertheless, there are different degrees of satisfaction with the solution adopted for the preservation of the house, that is, HHT. There are, therefore, hosts fulfilled and hosts not fulfilled with the HHT (see interview no. 20).

In summer, yes, in winter it is very weak. The showcase is Buçaco. From 2006/2007, the economy started to go down. Currently it is very difficult to sustain. This is a 19th century family house. There are a lot of maintenance expenses. The house comes from a Mr. Duparchy, who came to lead the construction of the railways. It was bought by my wife's family. Nowadays it is experiencing many difficulties of sustainability. Accommodation has decreased a lot. This type of tourism is one of the most important. It transmits values to foreigners. The activity is very much divided between luxury tourism and the rest. HHT has also been affected by this aspect. While there is life, there is hope. With the improvement of the economy, we hope to improve the activity. There are also country houses and village houses, where the presence of the owners is not compulsory. [Interview no. 20]

If, as we have seen, the owner's equity can be used when the economic sustainability of HHT is reduced and financing is insufficient to recover the house, the opposite can also happen, the owner's equity can be increased, even if modestly, by the economic sustainability of HHT.

Ultimately, the host's main concern being the restoration and maintenance of the house, he fights a permanent fight against time. The HHT must contribute, essentially, to this goal. If it contributes to the host's livelihood, then it will allow him to fully dedicate himself to the activity.

5.1 Raising the Economic Sustainability of HHT

The solution to raising the economic sustainability of the house may be to have a larger number of variable staff in periods of high inflow of guests. However, it is always necessary to instill the values of HHT in the staff. Another possibility is to reduce the number of variable staff while keeping the fixed staff and, in periods of high affluence, the host can dedicate more time to the HHT. In this case, the needs in terms of staff will be conditioned by the hosting capacity of the house.

The house's reputation feeds its economic sustainability. A reputable house in the eyes of guests is a house that can attract a continuous flow of bookings. On the other hand, the more economically sustainable the HHT is, the more intense the recoveries will be and the more apt the house will be to be passed on to descendants. Thus, hosting provides a financial motivation for recovery. Moreover, if the host knows recovery agents (i.e., construction workers) and hires them from the surrounding area, this can have positive effects on the intensity of the recovery undertaken and its costs for economic sustainability.

For HHT to be profitable, there must be a minimum occupancy to cover fixed costs. For this, a good part of the accommodation capacity must be open to occupation and the host must be fully dedicated to the activity. If the host wants to increase profitability, it will have to reduce staff by increasing the dedication it gives to the HHT. Thus, the host may choose to keep the staff he had from housekeeping in order not to incur fixed charges that burden the sustainability of HHT.

The HHT is not very sustainable by nature (see interview no. 50). One of the ways to raise profitability is to make the relationship with the guests more frequent, making them loyal to the house's accommodation proposal.

It's the final straw! Keeping a house like this running is a cancer. Certifications are not significant, it's burying money. We keep the house running, it's expensive to keep the house running. We lose some quality of life. We have a different life. Since I am a teacher, I only have vacation in August, but I can't leave. We can still increase the number of guests, but everything is still very seasonal. If we can stop the winter bloodletting, it's already a lot. For that, you must have hotel quality, what's worth it's trying to capture tourism. [Interview no. 50]

Another way to monetize is to increase the energy and environmental sustainability of the HHT, whereby the host can use biological sources of energy and water.

Increasing sustainability also means not incurring fixed charges when there is no or low occupancy.

HHT is a way to preserve houses, to pass them on, so the profit margin should be immediately invested in recovery. To raise the economic sustainability, the host may also seek to increase the hosting capacity by recovering annexes.

One way to increase self-sustainability is to extend the hosting relationship with the clients. For that, it is critical to better articulate the house with its surroundings, as well as to formalize the HHT service. In fact, the attractiveness of the surroundings in which the house is inserted is also responsible for an increase in economic sustainability. However, it is up to the host to enhance this attractiveness, differentiating the accommodation proposal.

To raise economic sustainability, the host must make micromanagement decisions, concerning actions that seem of minor relevance, such as doing the laundry inside or outside the house.

In fact, it may be that other modality of lodging exploitation in which guests have total autonomy allow for greater economic sustainability of the house, modalities that fall within a less rigid legal framework than the one that falls on the HHT.

To fill the accommodation capacity that the house has available, the HHT can go for differentiated accommodation proposals (i.e., changing the product to be offered, such as, for example, half-board, 2-day stay with enhanced welcome drink, among others).

The annexes are a way to monetize the activity, escaping the functional constraints of the manor house. Thus, one way to raise economic sustainability is to create a hybrid style of HHT refunctionalization, in addition to the classic style typical of the improvisation phase (Braga, 2016).

As we saw above, capital from HHT can avoid intensive recoveries, which would require an investment project and equity or funds from the political structure, or even bank financing.

On the other hand, there seems to be an increasing tendency for houses to reach the guest through massive intermediaries (e.g., reservation systems like *booking.com*) who work with HHT-insensitive guests (Braga & Silva, 2021), as these will allow them to raise economic sustainability. However, this type of guest requires more dedication on the part of the host.

In the period of low affluence, there are circumstances in which isolated reservations can result in a loss of economic sustainability. Therefore, out of pure economic rationality, it may be better for the economic sustainability of the house if it is closed.

Thus, the host will have the goal of reducing the fixed charges to a minimum. Therefore, the host family, while it has no guests, should not use infrastructures that it would only use if it had guests because this will increase the fixed charges of the HHT.

The costs inherent to house restoration are, in HHT, higher than in other types of tourism, since in houses that have been recently built, the wear and tear on materials are much less significant. This is a major obstacle to lowering prices to compete with mass lodging. However, depending on the accommodation capacity of the house, the owner can raise the economic sustainability of the house by reserving

accommodation capacity in the house for another model of exploring accommodation that does not burden the economic sustainability as much.

There are also add-ons to the HHT, such as wine tastings, merchandising sales, and paid tours of the house that help support the house economically, among others. By enhancing the HHT's hosting proposition, the host can recover the house at a higher rate.

The host should be dynamic and creative in the low affluence period to differentiate the lodging proposal, creating, if possible, a complementary economic modality to the HHT. The host will have to be more dedicated to the activity to increase its self-sustainability, and this dedication must be maximal in the period of high affluence, to allow the accommodation capacity to be filled.

Having more HHT-sensitive guests, because they spend more, as well as having guests with longer lodging relationships are other ways to raise economic sustainability.

It is by building up a good reputation that the house can increase the occupancy of the accommodation capacity and, therefore, its economic sustainability, since rival houses present very similar and, therefore, replaceable products.

Also, there may be occasional events in the house surroundings that make HHT more attractive at a certain time of the year and lead to greater economic sustainability during that period.

5.2 Reducing the Economic Sustainability of the HHT

As we have seen above, in the HHT it is more difficult to hire only variable staff, as is the case in many mass lodgings, which could raise its economic sustainability. There is a set of fixed staff always attached to the house who works for the HHT, but also for the host family. Thus, there seems to be less flexibility in hiring and firing staff at the HHT. Therefore, fluctuations in occupancy cannot be compensated for by laying off workers with the same turnover as in a mass accommodation. The cost of staffing is increased in the period of high affluence since more labor is needed to conveniently serve more guests.

When it comes to the recovery of the house, for it to be true to its identity, it is possible that the owner will have to hire recovery agents from outside the surroundings, which will be detrimental to the self-sustainability of the house. To do this, the host may have to apply his/her own capital.

On the other hand, political structures, in the professionalization phase, require a dedication from the host that cannot be diminished by hiring staff, as this will harm economic sustainability.

If the price depends on the service formalization achieved by the HHT and the articulation that the lodging proposal achieves with the surroundings, in the period of low affluence the lack of occupation of the lodging capacity will cause a huge lowering of prices which will make the HHT unsustainable from an economic point of view.

HHT's compliance with the legal framework decreases its economic sustainability. This is even more true because the legal framework is not adapted to the identity of the house, being undifferentiated irrespective of whether it applies to a mass lodging or HHT. Thus, HHTs must maintain prices, otherwise, they will suffer from competition from mass lodging and similar houses. On the other hand, the political structure can make service formalization requirements that are reductive to self-sustainability.

In short, HHT is more expensive than the other types of accommodation, precisely because there is a need to restore the house (see interview no. 39).

My husband has the concept that if we rented the house it would be more cost effective. But it's my house, it's hard for me. This house has old things that I have feelings for. I don't know who's coming. As long as we can, we won't rent. It would be more profitable and worthwhile. There is a lot of work here. My husband sets the table, takes things out of the machine, we talk, I make dinner. If we rent the house it's easier, but it's not HHT anymore, it's conservation of old houses. [Interview no. 39]

Thus, HHT operates in amplifying causal loop (Braga & Dionísio, 2021b). The more economic sustainability is reduced, the less the host will be able to hire staff and may have to rely on existing permanent staff. Consequently, it is possible that the formalization of the HHT service will suffer, with damage to the reputation of the house.

Moreover, the reduction in the economic sustainability of HHT will be accompanied by a decline in the pace of recovery and a consequent decrease in its intensity since HHT does not generate equity. In turn, the resulting loss of reputation will reduce the economic sustainability of HHT, as it will increase the duration of low affluence periods.

Economic sustainability is also more difficult to achieve because the price is dependent on the weighting of fixed charges that are less controllable in the HHT than in its competitors (e.g., it is more difficult to lay off staff, more heating is needed in winter and maintenance of the pools in summer).

The peculiarity of being an establishment with little lodging capacity makes it difficult to achieve economies of scale in HHT (i.e., increased occupancy is not always likely to increase the burden of the lodging proposal by a smaller proportion).

In extreme cases, the reduction of the sustainability of the HHT can even lead to the breakdown of heritage transmission. In fact, some hosts close the hosting capacity of the house because the occupancy is not enough to make the HHT profitable, and the non-sustainability of the HHT can lead to making it impossible to pass on the house. Effectively, the HHT struggles with chronic low occupancy.

In summary, if there is a continued reduction in economic sustainability, HHT risks incurring a negative financial structure, which will lead to the pace of recovery becoming slower and continuity less assured.

6 Discussion and Concluding Remarks

The problem of the impacts of rural tourism in general and of HHT, in particular, have been addressed before by the tourism literature (Cavaco, 1999; Silva, 2005–2006). However, the present study presents relevant novelties regarding the knowledge of the behavior of the hosts and/or owners of HHT and the strategies used by them to ensure the self-sustainability of that tourism product and by metonymy of the manor house.

Some of the research findings are summarized in Fig. 1, in which “self-sustainability” is seen as a dependent variable of the properties “raising the economic sustainability” and “reducing the economic sustainability.” Thus, this study allows us to recognize the impacts that the behaviors and actions of hosts, guests, and the political structure can have on the economic sustainability of the HHT.

In reality, a substantial part of these houses can no longer depend economically on agriculture, since this primary sector activity has lost relevance in the local economy. In this way, there has been a revaluation of the cultural and natural heritage in a logic of multifunctionality of rural areas.

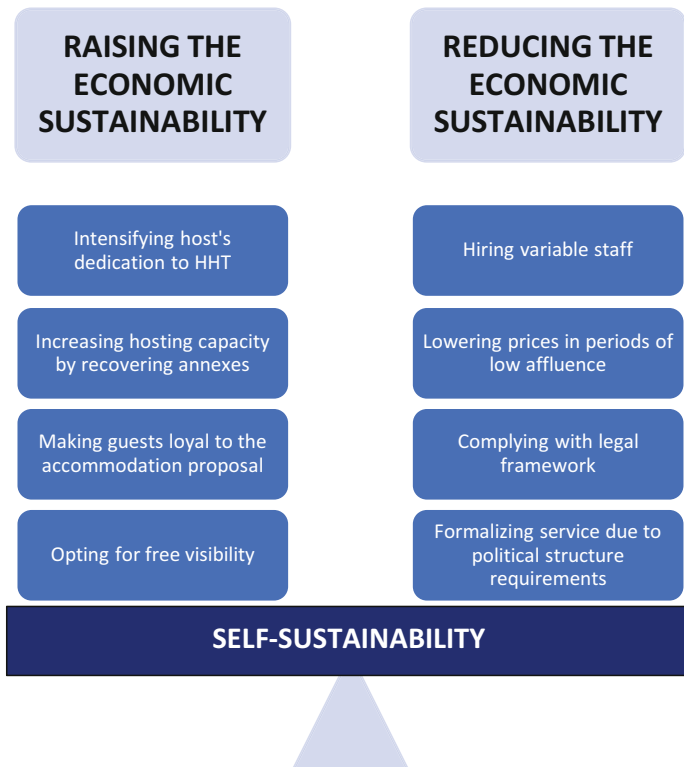


Fig. 1 HHT’s self-sustainability scale. Source: Own elaboration

Owners who have houses with outbuildings should devise two differentiated hosting systems. Also, the HHT host must dedicate himself intensively to the activity, seeking to make an effective articulation of the house with its surroundings.

Manor houses should develop lodging proposals that appeal both to guests sensitive to the HHT and to guests insensitive to the same activity. Competition with rival houses should not be through price, but through formalization and differentiation of the lodging proposal. Nevertheless, hosts should not formalize HHT too much, otherwise, it will lose its differentiation from mass accommodation. In addition, the host should act as a host enhancer, being aware of the endogenous resources and events of the surroundings to facilitate the customer experience.

For its part, the public sector must ensure that the legal designation of HHT refers only to very high quality and highly homogeneous housing. In turn, the local authorities must ensure the attractiveness of the surroundings of the houses. Houses have a high bureaucratic burden that falls on HHT hosts, and the legal framework is constantly changing, which fuels insecurity amongst stakeholders. This instability is hindering the economic sustainability of HHT and should be changed. Finally, local administrations should stimulate tourist entertainment in the surroundings of the houses, not only in high season but also in low season.

The present study has limitations because the stated research problem, which concerns the economic sustainability of houses, was only one of the topics addressed in a more extensive work carried out within the investigative scope of a doctoral thesis (Braga, 2016). Therefore, we believe that this issue justifies a specific study to test the hypotheses generated herein.

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