



EFFECTUATION AND LIFESTYLE ENTREPRENEURSHIP: DYNAMICS AND CHALLENGES IN THE CREATION OF NEW VENTURES

EFFECTUATION E EMPREENDEDORISMO DE ESTILO DE VIDA: DINÂMICAS E DESAFIOS NA CRIAÇÃO DE NOVOS EMPREENDIMENTOS

EFFECTUATION Y EMPRENDIMIENTO DE ESTILO DE VIDA: DINÁMICAS Y DESAFÍOS EN LA CREACIÓN DE NUEVOS EMPRENDIMIENTOS

ABSTRACT

Objective: The objective of this study is to explain how effectuation and its effectual means contribute to the creation of new ventures in lifestyle entrepreneurship.

Methodology: Using an exploratory qualitative multiple-case study method, data were collected through semi-structured interviews and document analysis in five ventures located in the state of São Paulo.

Results: The results highlight the ambiguity and dynamism in the entrepreneurs' identities, prior knowledge, and relationship networks, which are continuously integrated, strengthening the means available for the creation of a lifestyle venture.

Originality and Value: The research contributes to Effectuation theory by deepening the understanding of the dynamic and ambiguous nature of effectual means in the creation of new lifestyle ventures, offering a new perspective on how these means are activated and utilized by entrepreneurs.

Keywords: Effectuation. Entrepreneur. Lifestyle Entrepreneurship.

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RESUMO

Objetivo: O objetivo deste estudo é explicar como a *effectuation* e os seus meios efetuais contribuem na criação de novos empreendimentos no empreendedorismo de estilo de vida.

Método: A partir de um método qualitativo exploratório de casos múltiplos, foram coletados dados, por meio de entrevistas semiestruturadas e análise documental, em cinco empreendimentos localizados no estado de São Paulo.

Resultados: Os resultados destacam a ambigüidade e o dinamismo das identidades, conhecimentos prévios e redes de relacionamento dos empreendedores, continuamente agregados e fortalecendo os meios disponíveis para a criação de um empreendimento de estilo de vida.

Originalidade/valor: A pesquisa contribui para a teoria da *Effectuation* ao aprofundar a compreensão da natureza dinâmica e ambígua dos meios efetuais na criação de novos empreendimentos de estilo de vida, oferecendo uma nova perspectiva sobre como esses meios são acionados e utilizados pelos empreendedores.

Palavras-chaves: *Effectuation*. Empreendedor. Empreendedorismo de Estilo de Vida.

RESUMEN

Objetivo: El objetivo de este estudio es explicar cómo la *effectuation* y sus medios effectuales contribuyen en la creación de nuevos emprendimientos en el emprendimiento de estilo de vida.

Método: A partir de un método cualitativo exploratorio de casos múltiples, se recopilaron datos mediante entrevistas semiestruturadas y análisis documental en cinco emprendimientos ubicados en el estado de São Paulo.

Resultados: Los resultados destacan la ambigüedad y el dinamismo de las identidades, conocimientos previos y redes de relaciones de los emprendedores, que se agregan y fortalecen continuamente, potenciando los medios disponibles para la creación de un emprendimiento de estilo de vida.

Originalidad y Valor: La investigación contribuye a la teoría de la *Effectuation* al profundizar la comprensión de la naturaleza dinámica y ambigua de los medios efectuados en la creación de nuevos emprendimientos de estilo de vida, ofreciendo una nueva perspectiva sobre cómo estos medios son activados y utilizados por los emprendedores.

Palabras clave: *Effectuation*. Emprendedor. Emprendimiento de Estilo de Vida.

INTRODUCTION

Lifestyle entrepreneurship is emerging as a growing alternative in which individuals choose to align their personal passions and values with creating a business venture (Ateljevic & Doorne, 2000; Fadda, 2020). Unlike traditional entrepreneurs, their business supports the lifestyle they have chosen by using their identities, knowledge, and relationship networks (Lima et al., 2020). This study explores how these three elements are employed as effectual means for transforming their passion into viable enterprises, and moreover, how these can offer new perspectives on the creation of lifestyle enterprises in general.

Widely studied in the field of tourism, lifestyle entrepreneurs are characterized by their pursuit of work-life balance and by prioritizing personal satisfaction and professional fulfillment (Nedeljković & Čikić, 2021; Sun et al., 2020). Unlike traditional entrepreneurs, lifestyle entrepreneurs seek to create ventures that allow them to live according to their personal values and interests (Marcketti et al., 2006). These entrepreneurs value autonomy, flexibility, and the integration of their passions into their work lives such that these are fundamental to the way they conceive and manage their ventures (Ivanycheva et al., 2023). It can happen that these entrepreneurs, when deciding to undertake a business venture, allow their identities to take the lead as they draw upon their knowledge of and relationships surrounding their lifestyle, which is considered by effectuation theory to be effectual means and integral to the



bird-in-hand principle explained below (Sarasvathy, 2001).

Proposed by Saras Sarasvathy (2001), effectuation theory offers a theoretical framework that aligns with the behavior of lifestyle entrepreneurs. His bird-in-hand principle regards the use of available means when an entrepreneurial action is first undertaken, specifically, this refers to one's identity, knowledge, and relationship network. This form of entrepreneurship favors experimentation and adaptation to changes instead of following a rigid and predetermined plan, which is named causation (Lima, 2022). For lifestyle entrepreneurs, effectual logic allows them to create ventures in a flexible and adaptive manner by using their identity, knowledge, and relationship networks as effectual means.

Despite the clear convergence of this theoretical framework and lifestyle entrepreneurs, there is a gap in the literature describing how, in practice, these individuals perceive and employ effectual means at the outset of their ventures. Most studies on effectuation focus on traditional entrepreneurs or tech startups, and neglect the more unconventional types such as lifestyle entrepreneurs (Fisher, 2012; Kerr & Coviello, 2020). Furthermore, there is a scarcity of empirical studies investigating how they use their identity, knowledge, and relationship networks from the very start (Lima et al., 2024).

The objective of this study is to explain how effectuation and effectual means contribute to the creation of new ventures in lifestyle entrepreneurship. More specifically, we seek to understand how lifestyle entrepreneurs perceive, mobilize, and interact with effectual means during the early stages of their ventures. The research question guiding this study is: How does effectuation contribute to the creation of new lifestyle ventures and, in particular, how are effective means mobilized in the initial stages of these ventures?

To answer this question, a qualitative, exploratory study was conducted with five lifestyle entrepreneurs operating in the state of São Paulo. Data collection was conducted through in-depth interviews and document analysis. The results indicate that effectual means are dynamically mobilized and anchored in the entrepreneurs' personal trajectories, which demonstrates the central role of identity in the establishment and maintenance of such ventures. It was also observed that knowledge surrounding personal interests was prioritized over management skills, and that relationship networks exerted a significant influence on business validation and continuity.

After the introduction, this study is divided into four parts. First, the concepts of lifestyle entrepreneurship and effectuation are presented. Second, the criteria used in the field research, the study's design, and the methods and techniques adopted for data analysis are described. The third section analyzes the results of the collected data and identifies the convergences and divergences among the cases. It then compares these results with the chosen theoretical framework and the current understanding of lifestyle entrepreneurship in the literature. The conclusion summarizes the study's theoretical and practical contributions, discusses its limitations, and outlines an agenda for future research in the field.

THEORETICAL REFERENCE

Lifestyle Entrepreneurship

What makes lifestyle entrepreneurship unique is that it combines very personal values, interests, and passions with launching a business. Marcketti, Niehm, and Fuloria (2006) define these entrepreneurs as individuals who operate businesses aligned with their personal values and goals that generate positive impacts not only on their own lives but also on their employees, customers, and communities. This type of enterprise, by prioritizing quality of life over acce-



lating growth, creates a virtuous network that begins with the actions of these entrepreneurs and extends to everyone around them. Lifestyle entrepreneurs seek self-control, mastery, and independence. They balance work and family life, and prioritize comfort, freedom, and flexibility over financial gain and business growth (Dias et al., 2023).

The lifestyle entrepreneur begins an entrepreneurial cycle based on their own pastimes. This leads to a positive impact on their immediate environment and sustains a lifestyle with a comfortable financial situation for them (Davidsson & Honig, 2003; Ivanycheva et al., 2023).

Lifestyle entrepreneurs prioritize their quality of life and the well-being of their families. To balance these priorities with a viable business, they sometimes compromise on providing excellent service and fail to pursue adequate business development, growth, or innovation (Ivanycheva et al., 2023).

We can see a type of entrepreneur emerging that is not motivated by profit or monetary benefits and does not fit the standard economic definitions of entrepreneur and entrepreneurship (Ateljevic & Doorne, 2000). The origin of this phenomenon is associated with recent social developments such as hypermodernity in which the individual seeks connection with others, self-fulfillment, and respect for the values of others (Borsatto et al., 2024). The hierarchy of markers for success are inverted when compared to the traditional hierarchy as quality of life and personal balance take precedence here (Dias et al., 2022).

The creation of a lifestyle venture involves the expansion and materialization of the entrepreneur's identity (Nedeljković & Čikić, 2021), and answers the question, "who am I?" Personal identity drives the creation of the new venture by combining it with the means found in answering the questions, "what do I know?" and "who do I know?" The answers to these three questions

allow the entrepreneur to envision possible ends with the effectual means in a way that is aligned with their lifestyle. The concept of effectuation and the effectual means of identity, knowledge, and relationship network (Sarasvathy, 2001) are fundamental for people launching this type of venture.

Effectuation

By identifying gaps in entrepreneurship research, Sarasvathy (2001) proposed a new theory he named effectuation. This new entrepreneurial model is characterized by its opposition to causation, which is the widely recognized model of entrepreneurship (Sarasvathy, 2001). By understanding that some entrepreneurs make decisions without relying on collected data and predetermined factors, and instead use their effectual means of identity, knowledge, and relationship networks, a new concept that describes this behavior becomes necessary.

Developing a business plan, conducting market research, analyzing competitors, acquiring resources to execute the business plan, and adapting that plan to the environment over time to create and sustain a competitive advantage are behaviors characteristic of causation. To start a new business with this approach, the entrepreneur relies on information, data, research, and planning to achieve a pre-determined objective (Sarasvathy, 2001; Sarasvathy & Dew, 2005).

With the effectuation approach, the entrepreneur does not begin by identifying a specific opportunity. They first assess the effectual means by asking: Who am I? What do I know? Who do I know? The answers select and define the objectives that the entrepreneur can pursue (Sarasvathy, 2001; Sarasvathy, 2024).

Effectuation is a dynamic process that clarifies entrepreneurial action by using available means to establish new ventures in an uncertain environment (Alves et al., 2022). The entrepreneur who adopts the effectuation approach



envision the possibility of a new business and plans a set of actions using the available means to achieve this objective (Ferrari et al., 2024). At times, in effectuation, the entrepreneur will face uncertainty about the success of the business or product in the target market, or about the viability of the business in an environment that does not yet exist (Sarasvathy, 2024).

To develop practical and pedagogical applications for the theory of effectuation and its dimensions, Sarasvathy outlined five principles: bird-in-hand, acceptable loss, patchwork quilt, lemonade, and pilot-in-the-plane.

The bird-in-hand principle is the subject of in-depth analysis in this study, and it refers to the combined use of identity, knowledge, and relationship network to imagine possible outcomes and initiate entrepreneurial action (Lima & Lopes, 2019; Silva & Lima, 2023). This principle requires immediate action using means already under an entrepreneur's control and prioritizes viable execution over scalable but uncertain ideas (Sarasvathy 2024). The principle of acceptable loss regards an entrepreneur's definition of how much they are willing to lose rather than their estimation of expected returns (Martina, 2020). Patchwork refers to the self-selected partners or stakeholders who contribute to the venture, participate in it, and share its success (Kerr & Coviello, 2020). The lemonade principle refers to acting on opportunities offered by the misfortunes encountered by the entrepreneur and their venture (Borsatto & Lima, 2023). Pilot-in-the-plane refers to the entrepreneur's leading role in building and co-creating their own future as they undertake it (Sarasvathy, 2024).

For Fisher (2012), effectuation theory proposes that, in an uncertain environment, entrepreneurs can adopt a decision-making model which differs from the conventional model of causation and neoclassical economic theories which have explained entrepreneurial behavior

until recent times. Because an entrepreneur's objectives can change over time as they adapt to ever-changing conditions, they can potentially maintain more control over available resources and manage risks and potential losses better by not focusing exclusively on pre-determined goals (Fisher, 2012; Silva & Lima, 2023).

The main difference between causation and effectuation lies in their approaches to the elements of the decision-making process. In causation, a goal is established and then the resources to achieve it are sought. In effectuation, the entrepreneur uses a limited range of means to contemplate a variety of possible ends (Fisher, 2012; Furlotti et al., 2020). Despite this distinction, the two models can be applied simultaneously or sequentially, depending on factors that can be micro (the entrepreneur), meso (the company), or macro (the environmental context) (Kogut et al., 2023).

METHODOLOGICAL PROCEDURES

Research design

To achieve the proposed objective of this study, qualitative exploratory research was conducted. According to Creswell (2016), qualitative research is an appropriate approach for exploring and understanding the meaning that individuals or groups attribute to a social or human phenomenon. The multiple case study method was adopted because it allows comparison between the objects studied and reveals convergences and divergences between them. Yin (2015) observes that qualitative case studies are highly recommended for investigating why and/or how a phenomenon occurs, thus enabling more adequate interpretation and understanding of the individual parts of a complex phenomenon. Ruffa (2020) also notes the utility of case studies for expanding on theoretical concepts.



Research context

To date, the term lifestyle entrepreneurship has been largely used for small businesses whose founders prioritize goals beyond the exclusive pursuit of wealth and financial returns (Loarne-Lemaire et al., 2020). These small businesses operate in a variety of areas such as craft brewing, fashion, tourism, and food, and they offer enriching new experiences while revitalizing daily life in communities around the world (Ivanycheva et al., 2023). Experience-based products and services have been increasingly used to complement or even replace traditional hospitality services in areas such as lodging, transportation, and food (Leirdal et al., 2024). An example of this phenomenon is the recent emergence of lifestyle burger joints and artisanal bakeries in the city of São Paulo, Brazil, where products not only satisfy the demand for food but also express the entrepreneur's identity and personal knowledge.

Case selection

The cases studied here were of lifestyle entrepreneurs located in the state of São Paulo. A lifestyle entrepreneur is defined in this study as someone who has transformed a pastime into an enterprise which expresses their passion and personal identity (Ivanycheva et al., 2023). The selection of cases was intentional and used the snowball technique (Biernacki & Waldorf, 1981) in which interviewees recommend potential new study participants. The criteria adopted to select the case participants were: adults acting as entrepreneurs in their own lifestyle ventures, or who have some degree of involvement with it. Fur-

thermore, they were required to have played a significant role from the conception of the originating idea to its start-up phase.

Data collection techniques

After case selection, in-depth semi-structured interviews were conducted as recommended by Yin (2015). To validate the interview script, the content was reviewed by academics, and then two pilot interviews were conducted in September, 2020, followed by adjustments to the script.

To ensure methodological rigor and data triangulation, Yin's (2015) guidelines were followed when validating the information from the in-depth interviews. This included analyzing public documents available on the websites of the Department of Federal Revenue of Brazil, The São Paulo Board of Commerce, those of the enterprises themselves, as well as the social networks of the entrepreneurs and of their ventures.

Eleven interviews were conducted regarding five different lifestyle businesses, totaling 675 minutes of audio recordings which were partially transcribed. These interviews took place in October and November of 2020. Due to social distancing measures in effect at the time, all interviews were conducted remotely by Google Meet.

Table 1 presents the cases selected for the study, and it preserves the anonymity of the entrepreneurs and their ventures by using fictitious names.



Table 1
Lifestyle Entrepreneur Interviewees (LEIs)

Enterprise	Activities	Interviewees	Number of interviews (average duration)
Brother's Steak & Bar LEI-1	Located in the city of Guarulhos and founded in 2019, Brother's Steak & Bar is a steakhouse that combines partner Davi's culinary passion with a source of income for his family.	Davi (chef and entrepreneur) Douglas (entrepreneur)	3 (3h 19min)
Happy Hamburger LEI-2	Happy Hamburger is an artisanal burger restaurant in the city of São Paulo. It was founded in 2016 by entrepreneur Thales who, even with his law degree, has cooked since childhood helping his grandmother prepare family lunches.	Thales (chef and entrepreneur) João (Thales' father)	2 (2h 24min)
The Captain's Hamburger LEI-3	Near the center of São Paulo, The Captain's Hamburger offers classic burgers exclusively by delivery. Its founder, Júlio, has a degree in gastronomy and has been a fan of burger joints since he was a child.	Júlio (chef and entrepreneur) Beatriz (waiter and entrepreneur)	2 (2h 11min)
Joana Mini Bakery LEI-4	Also in São Paulo, Joana Mini Bakery is the realization of a dream for entrepreneur Breno. With a degree in Gastronomy and a passion for cooking since childhood, Breno began making artisanal breads in his parents' home, offering his first batches to family and friends.	Breno (baker and entrepreneur) Melinda (entrepreneur's sister)	2 (1h 22min)
The Turtle Sailing Yacht LEI-5	Anchored off Ilhabela in the state of São Paulo, the Tartaruga is a 31-foot sailboat serving as a home and source of income for the couple Luciano and Mariza. A Hotel Management graduate, Luciano worked on Ilhabela managing a guesthouse. In 2019, he purchased an abandoned sailboat, renovated it, and now offers sailing tours and overnight accommodations.	Luciano (captain and entrepreneur) Mariza (first mate and entrepreneur)	2 (1h 59min)

Source: Prepared by the authors (2024).

Data analysis

After collection, the data were carefully organized and analyzed to identify recurring themes and patterns. Data analysis adopted an inductive and interpretative approach to identify patterns, themes, and insights emerging from the interview transcripts (Miles et al., 2018). A uniform and iterative analysis grid was used which compared all the data with the literature to identify emerging themes (Miles et al., 2018). Using the software Atlas.ti qualitative analysis tool (Smit & Scherman, 2021), the data were initially organized into descriptive categories based on the recurrence of themes and their relevance to the research objectives. Axial coding was then performed in which the codes were regrouped into broader categories that represented the three effectual means described in effectuation theory: identity ("who I am?"), knowledge ("what do I know?"), and relationship networks ("who do I know?").

These categories were then refined into analytical subcategories, enabling a more in-depth analysis that could be referenced with the literature. The coding process was iterative, with constant comparisons between the empirical data and the theoretical frameworks of effectuation and lifestyle entrepreneurship as proposed by Miles et al. (2018).

To ensure validity of the analysis, the inter-rater reliability technique was adopted. Data coding was initially performed by one of the researchers and subsequently subjected to critical review by a second rater. Any differences in interpretation were discussed collaboratively through argumentative dialogue until consensus was reached to reinforce the consistency and robustness of the analytical categories.



ANALYSIS AND DISCUSSION

The data analyzed were separated into three categories of effectual means: Who am I? containing characteristics, tastes, and skills; What do I know? containing knowledge, education, training, specialization, and experience; Who do I know? containing social and professional networks.

For better presentation of data and in-depth analysis, the three effectual means were subdivided into three analytical categories each, as follows:

Who am I? was divided into: identity linked to lifestyle; entrepreneurial identity; and

professional identity. What do I know? was divided into: knowledge of entrepreneurship and management; knowledge related to lifestyle; and knowledge in other areas. Who do I know? was divided into: network relationships from previous jobs and businesses; network relationships related to lifestyle; and network relationships from family and personal friends.

Table 2 presents a comparative analysis of the five cases. It illustrates the similarities and differences between the cases and shows how the different means contributed to the creation of a new lifestyle venture.

Table 2

Contributions of effectual means to the creation of business for Lifestyle Entrepreneur Interviewees (LEIs)

Literature effectual means (Sarasvathy 2001; Read et al. 2009)	LEI-1	LEI-2	LEI-3	LEI-4	EEA5
Who am I? A) Entrepreneurial identity B) Professional identity C) Identity linked to lifestyle	A) Influence of the entrepreneurial father C) Affinity with cooking in adulthood B) Identity as person responsible for the kitchen	A) Influence of entrepreneurial parents C) Affinity with cooking since childhood B) Chef's identity	A) Influence of entrepreneurial father and uncle C) Affinity for cooking since childhood B) Identifies as a jack of all trades	A) Influence of the entrepreneurial sister C) Affinity for cooking since childhood B) Identifies as chef, baker and a jack of all trades	A) Influence of the entrepreneurial father C) Affinity with the sea since childhood B) Identifies as a tourism professional, as a mechanic and as a captain
What do I know? A) Knowledge about entrepreneurship and management B) Knowledge linked to lifestyle C) Knowledge in other areas	A) Professional experience in his father's business B) Professional experience in other food service businesses B) Takes courses that awaken his lifestyle B) University course in gastronomy C) Partner uses university experience to conduct marketing campaigns	C) Professional experience as a lawyer B) Professional experience in another food service business B) Takes courses that awaken lifestyle	A) Professional experience in his father's business B) Professional experience in another food service business B) Conducts research, reading, acquires knowledge on his own B) University course in Gastronomy	B) University degree in Gastronomy B) Professional experience in other food service businesses C) Professional experience as a travel agent B) Takes courses that reflect lifestyle	A) Professional experience in the father's business B) Professional experience in other businesses in the tourism sector C) Professional experience as a mechanic B) University degree in Hotel Management and Technology in Tourism and Environmental Management B) researches and reads, acquiring knowledge on his own
Who do I know? A) Network of relationships from previous jobs and ventures B) Relationship network linked to lifestyle C) Network of relationships with family and personal friends	A) Uses the relationship network to hire the first employees and service providers C) Family partnership C) Participation of family members in the period before and after the inauguration C) Relationship network becomes first customers	A) Uses the relationship network to hire the first employees and service providers B) The relationship network encourages overcoming difficulties and opening the business C) Participation of family members before and after the opening C) Uses relationship network for advertising C) Relationship network provides first customers	A) Uses relationship network to hire the first employees and service providers C) Participation of family members in the period before and after the opening C) Family partnership C) Uses the relationship network for advertising C) The relationship network provides first customers	A) Uses the relationship network to hire the first employees and service providers C) Family members help prior to inauguration C) Relationship network provides first customers	C) Family social circles B) Relationship network encourages overcoming difficulties and opening the business C) Relationship network provides first customers B) Relationship network donates equipment for the inauguration of the enterprise

Source: Prepared by the authors (2024).



Characterization of lifestyle entrepreneurs

The five lifestyle ventures in this study were founded by individuals who aligned entrepreneurial action with a hobby or an activity they were already performing that brought them great personal satisfaction. It was observed that these entrepreneurs sought the necessary resources to sustain this established lifestyle but did not prioritize maximizing ROI. What they did prioritize was balancing their personal and family life with their professional life. These findings confirm the research of Ateljevic and Doorne (2000) and Ivanycheva et al. (2023) on lifestyle entrepreneurship.

In the cases analyzed, some entrepreneurs discovered their favorite hobby in childhood. Examples include Luciano (LEI-5) who had always loved the ocean and surfing as a child when he would go to his parents' beach house in São Sebastião on the coast of São Paulo. Thales (LEI-2) accompanied his great-grandmother and grandmother in the kitchen from an early age.

Thales (LEI-2): So, I've always been very close to my family. I ended up seeing a lot of my family cooking. I loved watching my great-grandmother cook and having those weekend lunches on the farm, everyone together. I was three or four years old, and my great-grandmother let me help make rissoles for the first time. So I loved working in the kitchen, working with food, but I was very young, so it was slow, it was a process where I helped...

We also observed entrepreneurs who discovered their lifestyle in adulthood, in college or thereafter, such as Davi (LEI-1) who became interested in gastronomy by preparing meals for his wife and children when he left his worries behind after a busy day at work. These data converge with the literature on lifestyle entrepreneurship. Silva and Lima (2023) indicate that the narratives throughout each entrepreneur's life trajectory

give their experiences and actions a unique sense of meaning.

Effectual means—"Who am I?"

The development of each entrepreneur's identity prior to launching their venture was evident in the analysis of the results. In short, the evidence regarding identity in this study converges with that of Nielsen and Lassen (2012), and both complement Sarasvathy's (2001) effectuation theory. According to the seminal article on effectuation theory (Sarasvathy, 2001), identity is a preconceived and relatively static effectuation environment in the entrepreneurial process. According to Sarasvathy (2001), the effectuation environment "Who am I?" consists of the relatively unchanged characteristics and circumstances of the decision maker.

However, Nielsen and Lassen (2012), in their research, indicate that identity is a dynamic, not static, environment. Identity is constantly changing and evolving and is an effectual means under construction throughout the entrepreneurial process. In the analyses conducted here, identity evolution as a part of lifestyle was observed to be consistent with the studies of Lima and Lopes (2019) and the concept of lifestyle identity hypertrophy.

For Lima and Lopes (2019), lifestyle identity hypertrophy refers to the evolution, growth, and overflow of lifestyle-related identities. Lifestyle-related identity, when first emerging, occupies a small space among several possible identities of the future entrepreneur. However, over time, lifestyle-related identity evolves and grows until it reaches its overflow stage. At this point, the future entrepreneur begins to see themselves more as someone who develops activities aligned with their lifestyle (e.g., being a sailor (LEI-5), being a chef (LEI-1, LEI-2, LEI-3), being a baker (LEI-4)) to the exclusion of other identities. The lifestyle identity hypertrophy observed in this study led the future entrepreneurs to develop activities that truly brought them fulfillment and



pleasure and that also awakened them to entrepreneurship.

In addition to the activities mentioned in the previous paragraph, professional identity allows lifestyle entrepreneurs to take ownership of the core business of their venture. This provides a sense of security and reduces costs when establishing a lifestyle venture. According to Sarasvathy (2004), the way individuals engage in their entrepreneurial activities is directly related to their life orientation and identity. This concept is easily observed in the entrepreneurs analyzed in this study where their lifestyle and their roles in the ventures led them to identify as entrepreneurs and, simultaneously, as people who perform key operational tasks in their ventures, such as being a baker, a barbecue chef, a cook, and a sailor. As Davi (LEI-1) put it, "I'm the head chef and I take care of the administrative side while my brother takes care of the dining room and bar."

Effectual means- "What do I know?"

The effectuation environment "What do I know?" was observed in all the analyzed ventures and in all their dimensions. According to effectuation theory, the individual uses their previously acquired skills and knowledge during the entrepreneurial process. This effectuation environment includes the entrepreneur's education, training, and experience (Sarasvathy, 2001). To Read et al. (2009), the future entrepreneur uses their knowledge to gain direction, to create new opportunities, and to create new artifacts. Applying the entrepreneur's knowledge to create new opportunities and ventures was a prominent aspect of the lifestyle ventures studied. Read et al. (2009) observe that the three dimensions of the effectual environment "What do I know?" addressed in this study (business, main activity, and life trajectory) are relevant to lifestyle enterprises, and that the personal strength generated by this effective environment contributes positively to the development of the new enterprise.

Lifestyle-related knowledge is an effectual mean that enables entrepreneurs to recognize opportunities for starting a business, and it also contributes to their pleasure and satisfaction. Knowledge gained through observation, taking courses, doing research, or just working a job allows future entrepreneurs to recognize and visualize a range of new opportunities related to their lifestyle. According to Fisher (2012), opportunities identified by answering "What do I know?" are more actionable, facilitate decision-making, and contribute to the creation of the new venture.

Observing the evolution of the "What do I know?" effectual environment in the cases analyzed here offers real contributions to effectuation theory. Knowledge employed in establishing a new lifestyle venture sometimes began presumptuously, evolving from a curiosity and gaining momentum alongside other effectual environments in an uncommitted manner. Throughout an entrepreneur's life, the "What do I know?" effectual environment can evolve and expand with the entrepreneur's continuous accumulation of knowledge and can potentially become a permanent evolution.

According to studies by Nielsen and Lassen (2012), this dynamism derived from evolving knowledge aligns with the dynamism of identity, which addresses the effective environment "Who am I?". The findings in the present study complement the literature on effectuation that regards effective environments as "relatively unchanging" (Sarasvathy, 2001).

Although seldom studied in previous research, collaboration between effectual means was observed in some of the cases studied where one acts to drive another. In the analyses, "What do I know?" was driven by the other effectual means and helped an entrepreneur acquire and refine his knowledge, which was then used to create their lifestyle venture. This collaboration between effectual means can be observed



in the case of Davi (LEI-1) who, unmotivated to pursue his father's profession, was encouraged by his brother-in-law to change his life and take a course on grilling which propelled him towards his new lifestyle and encouraged him to open his business, Brother's Steak & Bar.

Davi (LEI-1): My brother-in-law had seen some videos of a group of barbecue chefs, and he showed them to me and really encouraged me, saying, "Davi, this is right up your alley. Why don't you follow these guys and be happy?" I did and started taking the barbecue chef course with them. That was the spark that sparked my life! I said, "This is what I'm going to do with my life from now on."

In some of the cases, the effectual means "What do I know?" was perceived negatively and did not contribute to the creation of new ventures. Such was the case of Thales (LEI-2), when he recognized his growing mastery in his chosen activity. However, this knowledge created a false sense of self-sufficiency in the future entrepreneur as he lacked management knowledge and began to encounter obstacles and difficulties early in his new venture.

Thales (LEI-2): Since I knew a lot about cooking and food, I thought all it took was a stove and a pan to make it work. But as time went by, I realized I had absolutely no administrative skills. I didn't know how much money was coming in, how much was going out, or how much was left over. I almost went broke. I've had to redo everything: the menu, negotiations with suppliers, purchasing...

This was also observed in the case of Davi (LEI-1). Upon realizing his lack of effectual means regarding management knowledge, he decided it

was not yet time to start a new venture. Davi then improved his management skills by working at other jobs, and later, with this gap in his knowledge resolved, he found that it was time to start his own venture.

Effectual means- "Who do I know?"

The "Who do I know?" effectual means utilizes the entrepreneur's network to generate alternatives, opportunities, and resources for the creation of new ventures, artifacts, and markets when none exist yet (Kerr & Coviello, 2020). The lifestyle entrepreneurs studied here used this in various ways and on numerous occasions when starting their ventures. For Davidsson and Honig (2003), having a support network positively influences future entrepreneurs.

The effectual means "Who do I know?" was subdivided into three aspects in this study. The first refers to a relationship network linked to previous jobs and ventures and relies on the entrepreneur's social skills for acquiring information and obtaining essential resources for a new venture (Furlotti et al., 2020). The development of these social skills was observed with Davi's (LEI-1) when he recruited three people from his professional network to join his venture at the very outset. So too with Breno (LEI-4) who hired a coworker from his travel agency days as his first employee.

Breno (LEI-4): As soon as I opened the bakery, I needed help with customer service and the kitchen. I knew a friend of mine who worked with me at the travel agency I worked at before opening the bakery. I called her and told her I needed help and asked if she'd be willing to work with me again. It worked out really well!

Compared to the first two effective environments, "Who do I know?" has more dyna-



mic characteristics that evolve throughout the creation of a new venture. The literature on relationship networks in entrepreneurship states that each entrepreneur's network varies and often expands over time (Kerr & Coviello, 2020). This was the case with Thales (LEI-2). His parents, initially opposed to his change of professions from lawyer to chef, began to support him when they realized that the decision would bring personal fulfillment to their son. They then activated their own relationship networks to help the new venture. The dynamism of the "Who do I know?" effective environment may be related both to the individuals who make up the entrepreneur's relationship network and to the improvement of the future entrepreneur's social skills. By improving these skills, the entrepreneur can better utilize the "Who do I know?" effective environment when creating their venture (Nielsen & Lassen, 2012).

Analysis revealed the formation of a continually expanding network, where each new individual brings their own effectual means, including their own relationship network, to collaborate in the creation of a new venture. Family ties are considered especially strong due to the level of relational reciprocity and trust in them (Davidsson & Honig, 2003). Thales's father (LEI-2) felt that when Thales launched his venture, the whole family became almost immersed in it, as if they were part of it too, and suffered anxiety as well as hope and joy with each obstacle that was overcome.

The other effectual means did not always collaborate with "Who do I know?" in launching

a new lifestyle-related venture. In the case of Luciano (LEI-5), intensifying his work on the sailboat was not met with support from many friends, no matter their involvement with his lifestyle.

Luciano (LEI-5): One thing we felt was the change in our friendships. My friends on land said, "You're crazy, leaving the comfort of your home to live in a cramped space. Are you going to raise your son on a boat?"

This effective environment was also found to drive "Who am I?" and "What do I know?" when Thales' (LEI-2) uncle encouraged him to do what he really enjoys, and to leave his law career in São Paulo so he could immerse himself in the world and in Gastronomy.

Thales (LEI-2): My uncle lived in Germany, and I always told him of my unhappiness regarding how I had followed in my father's footsteps in law. Eventually, he told me, "If you don't like it there, come to Europe and be happy with what you love."

This demonstrates how relevant the relationship network is where it allows for collaboration between the effectual means and also boosts other means and resources (Nielsen & Lassen, 2012).

Before concluding, the following summarizes those actions considered decisive in the creation of lifestyle ventures.



Table 3
Summary of the contribution of effectual means to the creation of new lifestyle ventures

EFFECTUAL MEANS		
Who am I? (identity: traits; values; life trajectory and experiences)	Entrepreneurial identity	The entrepreneur's identity manifests in executing entrepreneurial actions. Example: Davi (LEI-1) and Thales (LEI-2) were inspired to start their businesses initially by entrepreneurial parents.
	Professional identity	Entrepreneurs take charge of the core activities of their ventures, provide security and reduce costs. Example: Davi (LEI-1) recruited acquaintances to form his initial team; Thales (LEI-2) and Breno (LEI-4) hired colleagues from previous employers.
	Identity linked to lifestyle	Lifestyle identity evolves and occupies a central place in the entrepreneur's life. Example: Luciano (LEI-5) has always had a connection with the ocean. While working informally to maintain someone's catamaran he decided to buy his own sailboat, live on it, and start a business with it.
What do I know? (knowledge)	Knowledge about entrepreneurship and management	Management knowledge is essential, and lacking it can be an obstacle. Example: Thales (LEI-2) perceived this gap in his knowledge early on; Davi (LEI-1) sought to improve his management skills before starting his business.
	Knowledge linked to lifestyle	Knowledge that allows you to identify opportunities and create businesses aligned with your lifestyle. Example: Davi (LEI-1) began his interest in gastronomy by preparing meals for his family; Breno (LEI-4) aligned his lifestyle while studying gastronomy.
	Knowledge in other areas	Knowledge in various areas contributes to the creation and management of a business. Example: Davi (LEI-1) mapped out neighborhoods to choose the best location for his business; Thales (LEI-2) used knowledge acquired throughout his life to structure his business.
Who do I know? (social network, stakeholders)	Network of relationships from previous jobs and ventures	Important in recruiting workers for the new venture. Example: Davi (LEI-1) recruited three people from his network of former employers; Breno (LEI-4) hired a coworker from his travel agency days.
	Relationship network linked to lifestyle	Associated with sharing the same interests and challenges, this encourages the continuity of the entrepreneurial process. Example: Thales' friend (LEI-2) encouraged him to open a business even without all the necessary documents.
	Network of relationships with family and friends	Essential support in the creation and maintenance of the business. Example: Breno's mother (LEI-4) provided her kitchen and refrigerator for her son to bake and store his bread during the initial phase of the business; Luciano's friends (LEI-5) didn't support his decision to live on a sailboat.

Source: Prepared by the authors (2024).

CONCLUSION

This study describes how effectuation contributes to the creation of new lifestyle ventures by mobilizing effectual means in the earliest stages. Through the analysis of five cases, effectuation was found to provide a useful theoretical

framework for interpreting the formation of these ventures and shed light on the dynamics and ambiguities of the effectual means involved. The findings offer important theoretical and empirical contributions to the field while addressing the research question.



First, this study adds to effectuation theory by demonstrating its applicability in the specific context of lifestyle ventures. By analyzing how entrepreneurs use the effective means “Who am I?”, “What do I know?”, and “Who do I know?” in the earliest stages of their ventures, it was possible to identify complex and multifaceted dynamics. Effectuation, which applies to small businesses in general, proved robust in explaining how entrepreneurs seeking to align their work with their lifestyle use available means in unconventional ways to take advantage of emerging opportunities.

The study also reveals the dynamism of the effectual means “What do I know?” and “Who do I know?”, thus complementing that of the effectual means “Who am I?” addressed by Nielsen and Lassen (2012). It was observed that these means are not static; new identities, relationships, and knowledge are continually added, strengthening the means available to lifestyle entrepreneurs in the creation of their venture. For example, individuals’ entrepreneurial and professional identities evolved as they took on lifestyle-related roles in their ventures, such as being a baker or a cook, providing security, and reducing initial costs.

Furthermore, the findings demonstrated that the bird-in-hand principle manifests itself uniquely for lifestyle entrepreneurs, particularly through the strength of their intrinsic motivation and their use of available resources. Rather than seeking profit maximization, these entrepreneurs prioritized personal fulfillment and shaped their ventures as extensions of their lifestyles. This resulted in decisions such as starting operations in informal spaces like the family kitchen. Such behaviors reveal not only creative applications of available resources, but also a redefinition of entrepreneurial success based on authenticity and personal resilience.

These findings highlight how lifestyle entrepreneurs utilize the bird-in-hand principle by transforming elements of their personal backgrounds, technical knowledge, and relationship

networks into tools for starting and sustaining businesses. This reinforces the importance of considering this category of entrepreneurs as a group with its own rationale and whose means reflect not only operational capabilities but also profound values. From a theoretical perspective, this understanding broadens the scope of effectuation and offers new perspectives for effectual means in the context of lifestyle entrepreneurs.

Finally, the ambiguity of effectual means in the creation of new lifestyle ventures was identified. The “What do I know?” effectual means, while empowering the entrepreneur with specific knowledge, can also create a false sense of self-sufficiency that obscures the importance of management skills. Similarly, the “Who do I know?” effectual means proved ambiguous because while the relationship network provided valuable support, it also brought harsh criticisms about the decision to abandon conventional careers. These contradictions reveal the complexity of the entrepreneurial process and the need for a careful balance between the different effectual means.

Beyond its theoretical contributions, the empirical findings of this study have the potential to positively impact public policymaking focused on lifestyle entrepreneurship. By elucidating how effectuation can be applied in the early stages of new lifestyle ventures, this research provides a solid foundation for creating policies that encourage and support entrepreneurs in this segment. Public policies that promote entrepreneurial education, give access to support networks, and provide specific resources for lifestyle ventures can be guided by the findings of this study. Furthermore, the findings can be incorporated into teaching materials and public handbooks that offer practical guidance to individuals interested in starting their own businesses aligned with their interests and lifestyles. This not only strengthens the local entrepreneurial ecosystem but also fosters a diverse and sustainable culture of entrepreneurship.



Limitations

While the findings within the scope of the case studies are robust, the limitations of this research must be acknowledged. The study focused on a limited number of lifestyle entrepreneurs and in specific contexts located in the state of São Paulo. Furthermore, data collection based on in-depth interviews may introduce biases in perception and data interpretation.

Suggestions for future studies

To advance the understanding of lifestyle entrepreneurship through the lens of effectuation, we suggest conducting studies that expand the sample to different geographic regions and economic sectors. This would allow for a more comprehensive analysis of entrepreneurial practices in diverse contexts. Furthermore, longitudinal studies could offer insight into how lifestyle entrepreneurs evolve over time, how their effectual means change, and how they face specific challenges throughout the life cycle of their ventures. It is also recommended that comparative studies be conducted across different sectors, such as gastronomy, tourism, and sports, to identify variations in the mobilization of effectual means and to deepen the understanding of the behavioral patterns of lifestyle entrepreneurs in different ecosystems.

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