



Instituto Universitário de Lisboa

THE IMPACT OF SURFING ON TOURISM IN PORTUGAL

Case Study with pedagogical note

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## RESUMO

O Mar sempre foi uma parte essencial na Identidade Nacional Portuguesa.

O surf é uma tendência global emergente e uma imagem de marca.

A Economia do Mar tem vindo a ganhar importância nas últimas décadas e o “Retorno ao Mar” promove o surf como uma das atividades significativas.

Este estudo realiza uma pesquisa analítica e descritiva da importância do Mar e do impacto do Surf no Turismo em Portugal. É abordada a indústria do surf, do seu potencial, e o seu contributo para o turismo assim como o seu impacto nas economias locais; particularmente na Ericeira - a única Reserva Mundial de Surf na Europa.

Os resultados mostram como a mudança de perspetiva social contribuiu para o crescimento do surf e da profissionalização do sector, no acolhimento de eventos de surf internacionais.

Determina-se que Portugal poderia manter a sua posição como destino preferencial de surf na Europa, graças à qualidade dos seus recursos naturais, e às campanhas promocionais internacionais. Os resultados realçam que o surf promoveu o turismo traduzindo-se num aumento de turistas na Ericeira e dos negócios locais.

Apesar de o potencial do sector ainda não ter sido totalmente explorado, a necessidade de proteger os recursos naturais, criar enquadramentos legais e preservar a identidade do povo, deverá ser tida em conta.

Existe definitivamente um desenvolvimento positivo da Ericeira, do surf como meio de lançamento na projeção de Portugal, como um destino turístico e na imagem de um País moderno, de novas mentalidades e de aceitação das diferenças.

Palavras-chave: surf, turismo, Portugal, Ericeira

Classificação JEL: Z2 – Economia desportiva & Z3 Economia turística (Z320 – Desenvolvimento turístico)

## ABSTRACT

The Sea, (O Mar) has always been an essential part of the Portuguese National Identity.

Surfing is an emerging global trend and a brand image.

Over the past decades, the Economy of the Sea has gained an increasing importance and the "Return to the Sea" has actively promoted surf as one of its most significant activities.

The current study provides a descriptive and analytic research on the importance of the Sea and the impact of Surf on Tourism in Portugal. In particular, it examines the surf industry, its potential and contribution to tourism as well as its effect on local economy with a particular focus on Ericeira - the only World Surf Reserve in Europe.

Results demonstrate how a change in social perspective contributes to the growth of surfing, impacting the professionalization within the sector and hosting of international surfing events.

As implied, Portugal can maintain its position as Europe's preferred surfing destination due to the country's quality of natural resources and international promoting campaigns. Results illustrate how surfing has enhanced tourism, as seen through both the consistent increase of tourists in Ericeira and number of local businesses.

Whilst this sector is not fully exploited, the need to; protect natural resources, create legal frameworks and the preserve the people's identity, is kept in mind.

There is definitely positive development in Ericeira and surf, as a mean of opening up mentalities, projecting Portugal as a touristic destination, its image as a modern country with new mentalities, where differences are accepted.

*Keywords:* surfing, tourism, Portugal, Ericeira

JEL classification: Z2 - Sports Economics and Z3 Tourism Economics (Z320 – Tourism Development)

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## **1. THE CASE**

### **1.1.1. PRESENTATION OF THE SUBJECT**

This study aims to conduct the research and evaluation of the impact of surfing and surf tourism in Ericeira, the second global and first European World Surf Reserve, dedicated in 2011.

Surfing in Portugal is an established ocean sport; national surfing competition in Portugal began as early as 1977 in the Ericeira municipality (Moreira, 2019).

The case reviews Portugal's strategic location in the Atlantic Ocean, its historical link to the ocean, the formal recognition of the ocean as a pivotal contributor to the local economy, source of attraction for tourists, including surfers, and the state of tourism in Portugal.

The state of tourism, in this case, encompassed the essence of tourism in the global economy, tourism in Portugal and its central role to the national economy. In addition, sports tourism, sports events and the centrality of the ocean in the advancement of Brand Portugal are evaluated.

The surfing in Portugal and the growth of the sport, including its recognition in the Olympics, the essence of surfing events in Portugal and its domino relevance to the national image, the profile of individual surfers and the state of the surf economy in Ericeira are reviewed in the case study through 3 different investigations conducted between 11<sup>th</sup> and 31<sup>st</sup> July 2019 in Ericeira with a sample comprising of 41 surfers, 176 frequent summer tourists and 83 business owners and managers working in the trade and industry.

The study provides a general summary of the impact of surfing on tourism in the Ericeira municipality and the extent to which surfing has contributed to the acceptance of new life style the local population.

Portugal has an immense and unexploited tourism potential. The tourism potential is reinforced by the historical link to the ocean starting from the era of discoveries. Surfing had a positive effect on the economy of Ericeira as evidenced by the establishment of surf-related industries, higher tourism expenditure per trip, hosting of global sports events and classification of the locality as the only world surf reserve in Europe. The survey indicated that surf tourism was on the rise, and most tourists were willing to return.

### **1.1.2. ERICEIRA, THE INVESTIGATION GOAL**

Ericeira is a picturesque Portuguese fishing village, located about 35 kilometres northwest of Lisbon – about 45 minutes' drive from the capital, Lisbon (Travel in Portugal, 2019). The village, which derives its name from sea urchins or hedgehogs, has a rich history in whale fishing, dating back to 1229 (Save the Waves, 2011; Travel in Portugal, 2019; Triposo, 2019). The location of the Ericeira surf reserve is show as per Figure 1 and Figure 2. The map illustrates that it is the only surf reserve in Europe and one of 11 global surf reserves; these factors underscore the central role of the reserve in the development of surfing in Portugal and the EU. Historically, the local inhabitants relied on the sea for sustenance, which may have contributed to the early exploration of ocean sports (Save the Waves, 2011). Forty-three professional fishing vessels were registered in Ericeira in 1838.

Ericeira municipality is one of the leading surfing reserves globally, based on the endorsement by Save The Waves Coalition since 2011 (Teixeira, 2017b). The global recognition of Ericeira grew due to the types and quality of waves, beach breaks, rocky cliffs, small bays, and reef breaks at Coxos and Ribeira d'Ilhas (see Figure 2 and Figure 3) (Save the Waves, 2011).

Save The Waves was founded in 2001, as a global non-profit organization, aiming the protection of the coastal resources through a combined program of protected areas, economics and direct action and focusing on the surf zones. The World Surfing Reserves program's goal is the protection and preservation of surf spots and coastlines on a long-term framework. The Surfonomics agenda was created to define the value of a wave for supporting the local entities to take the correct choices and decisions on the defence and perseveration of their coastal environments and waves.



The recognition of Ericeira waves facilitated the development of multiple surfing schools and support infrastructure for surfing, mainly during the October-May season. This season is preferred due to the weather (precipitation, cloud cover, and day and night temperature). The daily weather is cool and comfortable, and the cloud cover is clear, as depicted in Figure 3 and 4, respectively. The wind averages between 17.7 and 20.9 km/h during the October-May season (Weather Spark, 2019), ideal weather conditions for surfing. The months with the best waves are correlated with low non-surfing tourist arrivals, and less crowding of the beaches (Azul-Ericeira-Mag, 2019). The typical weather patterns, coupled with global dedication by Save the Waves Coalition, have contributed to the development of surfing sports. A timeline of surfing sports in the region is highlighted below.

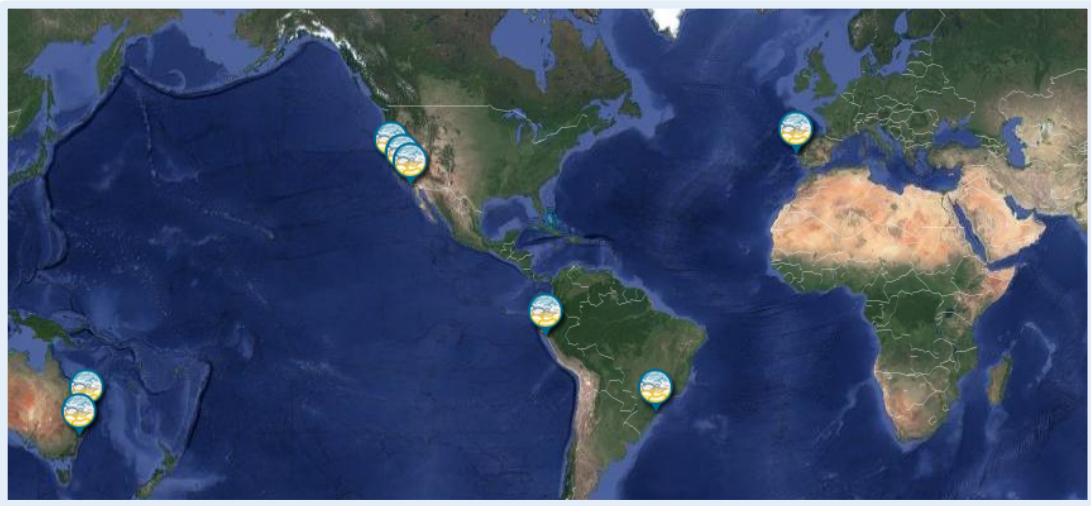


Figure 1: Location of global surfing reserves (Save the Waves, 2011)



Figure 2: Surfing spots in Ericeira (*Save the Waves, 2011*)

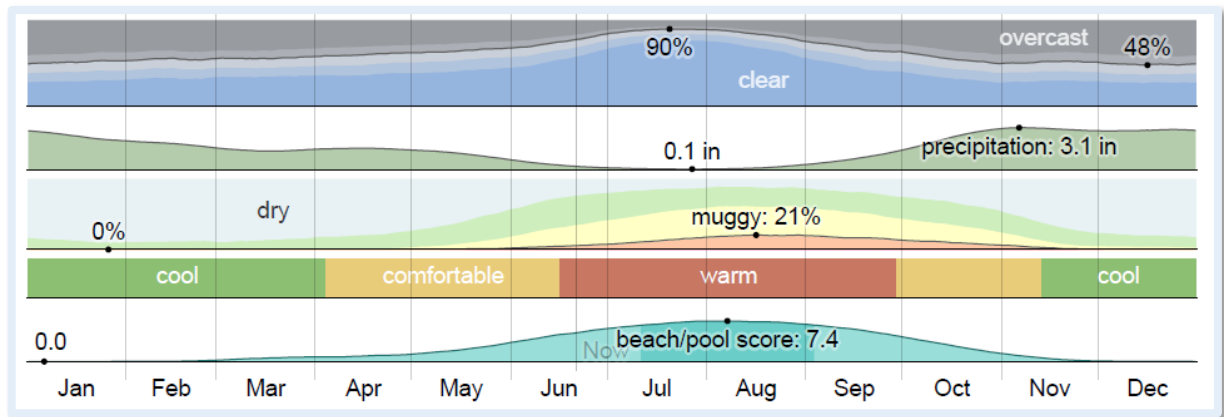


Figure 3: Annual weather patterns in Ericeira (January to December) (Weather Spark, 2019)

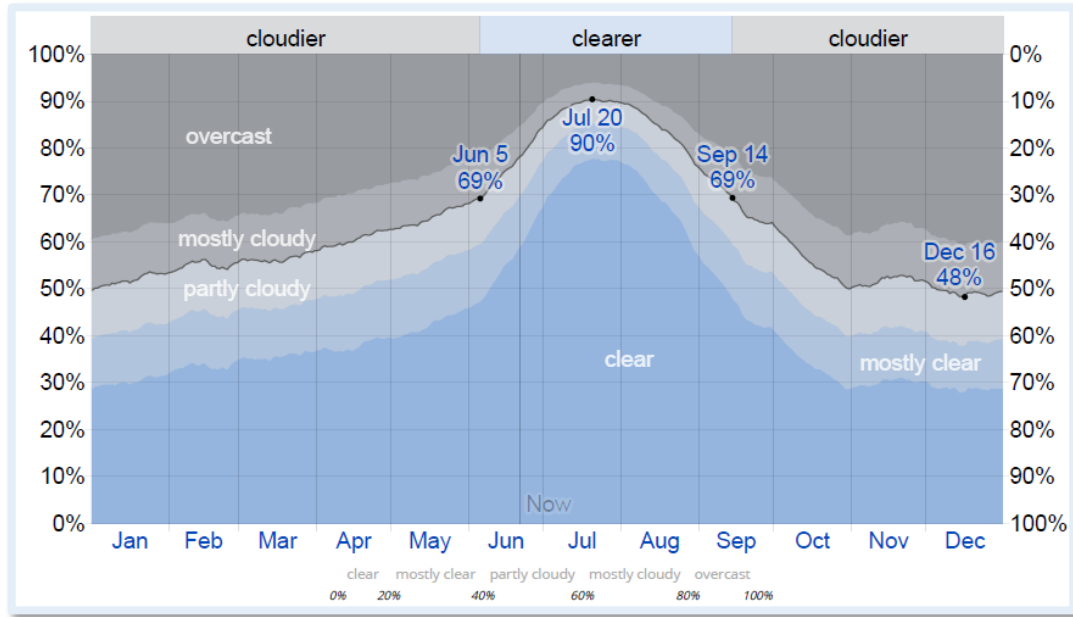


Figure 4: Cloud cover in Ericeira (January to December) (Weather Spark, 2019)

Ericeira hosted the surfing world cup in 1990 and later developed into a global surfing reserve (Moreira, 2019). Since then, the country has hosted multiple World Surf Leagues in 30 surf locations (Travel in Portugal, 2019). The early growth of surfing in the country has been reinforced by unique and world-class waves and active involvement of surfers originating from the municipality, such as “Saca” Tiago Pires (Travel in Portugal, 2019). Apart from Ericeira, other surfing municipalities include Nazaré, Figueira da Foz, Peniche and Praia do Norte. Each of these municipalities has a distinct wave (tubular, giant, tall, and straight) (Moreira, 2019; Teixeira, 2017), which is a result of distinct topography (northern, southern, and western facing beaches) and weather. Teixeira (2017) notes that Peniche has robust offshore local winds, which cause wave pitches. Other municipalities are also exposed to Atlantic Ocean swells.

The weather and geographic conditions increase the surfing wave quality and make the region ideal for surfing sports. In addition to the geographic advantage, surfing in Portugal has been augmented by international surfers and tourists, high-performance surfing centres, and accredited surfing schools. For example, since 2012, Nazaré village has gained surfing prominence, after Garret McNamara – a US surfer, surfed in the region (Moreira, 2019). In contrast to inland tourism, surf tourism enjoys robust demand all year round, from national and international tourists (Moreira, 2019). The growth of surfing as a recreational and competitive sport has had a trickle-down effect on the local economies.

## **1.2. PORTUGAL AND THE OCEAN**

### **1.2.1. INTRODUCTION**

The primary goal of this research is to undertake an analytic and descriptive evaluation of surfing in the Ericeira Municipality – the only world surfing reserve in Europe. The current and future potential of the industry is evaluated based on the available surfing schools, tourism related surfing agents, local and international tournaments, and the domino effect of such events on the local and national economy. Portugal is a country of interest due to its extensive coastline along the Atlantic Ocean. In 2009, Portugal submitted a request for the extension of the maritime area to the Commission on the Limits of the Continental Shelf (CLCS). The newly claimed area covers an additional 2 million square kilometers. Portugal's current claim to maritime resources covers an area of about 3.8 million square kilometer – which is about 40 times the landmass of the country (Government of Portugal, 2014).

The length of the country's coastline is one of the longest in Europe (European MSP Platform, 2018; Government of Portugal, 2014). These factors have contributed to the relevance of Portugal as a preferred destination for surfing and other marine sports. The coastline has at least eight big wave spots, 28-point breaks, 132 beach breaks, and nearly 200 surf spots (Portugal surf Guide – by António Pedro de Sá Leal and Francisco Cipriano). The Portuguese coastline, together with other characteristics that are intrinsic to the country, makes it an increasingly popular surf destination.

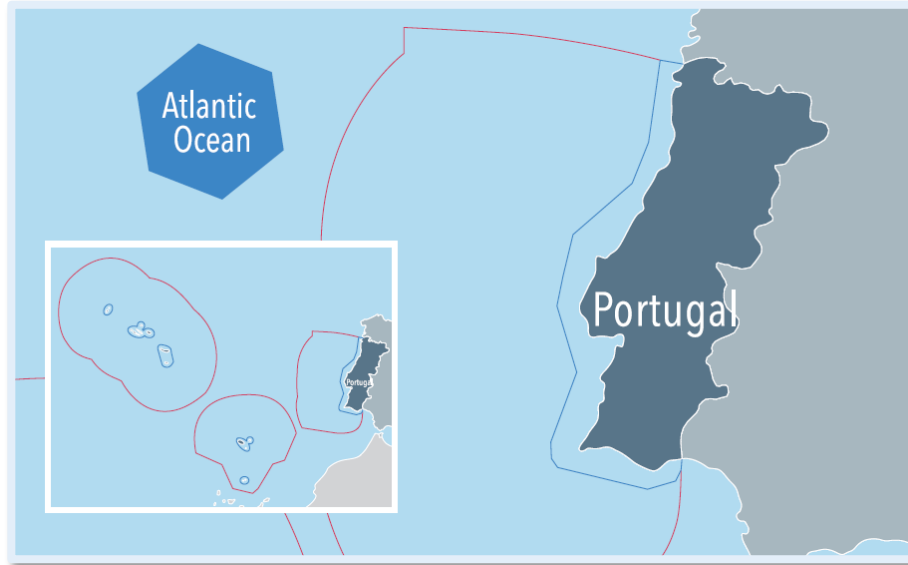


Figure 5: A map of Portugal's maritime area in the Atlantic ocean (European MSP Platform, 2018)

### 1.2.2. PORTUGAL'S LOCATION

Portugal is a country situated in Western Europe; it covers 92,400 square kilometers and has 10 million inhabitants (Euromar, 2019). The country's capital city of Lisbon is home to more than half a million Portuguese (Euromar, 2019). Portugal faces the Atlantic Ocean (the second largest ocean), which covers approximately 20 percent of the Earth's surface, separating the "Old World" from the "New World." The link with the sea became relevant during the discoveries era and marked the start of a globalization process. Portuguese borders have remained unchanged since the 13th Century, making Portugal one of the oldest countries in the world, with nearly 900 years of history that demonstrates its strong identity and internal cohesion, encouraging the necessity to expand towards the Sea. Portugal's position, on the edge of Europe, provided the best conditions for the dawn of a new world. This small country became the first successful nation to explore the Old World.

Portugal's strategic position is defined mainly by its proximity to the Atlantic ocean, extensive coastline, and Mediterranean-Atlantic shipping lanes; these factors help explain why Portugal is a preferred destination for nautical and cruise tourism (Moreira, 2018). Its geographic proximity to the European markets has contributed to the popularity of the country as one of the most preferred destinations for tourism and investment ( see Figure 6 (Aicep Portugal Global, 2013)).

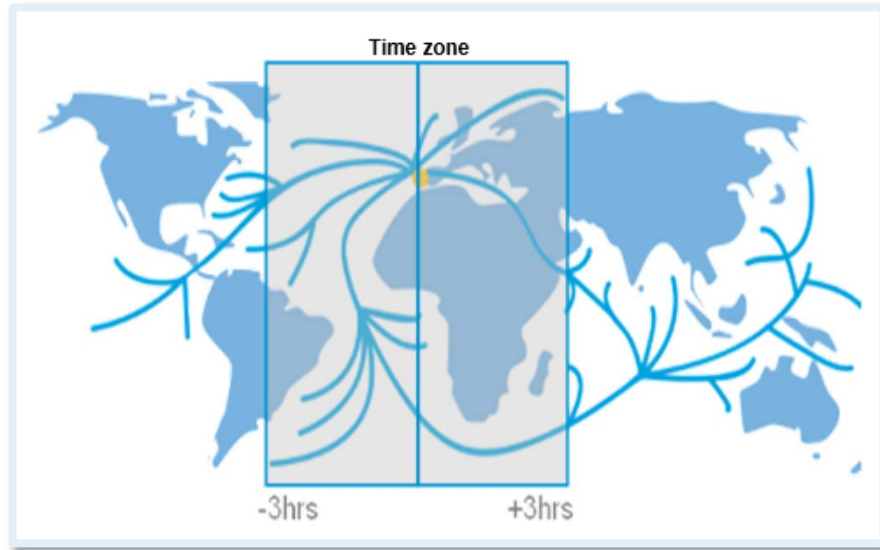


Figure 6: Strategic location of Portugal relative to Africa, South and North America and Russia (Aicep Portugal Global, 2013)

Portugal's positioning as the European hub for both North and South America and as a homeport for cruises is part of the governmental program for the improvement of connectivity. The preservation and improvement of coastlines and the sea in the tourism economy are strategic priorities of the Portuguese Tourism Strategy 2027, which aims to reaffirm tourism as a tool for economic, social and environmental development, as well as to position Portugal as one of the most competitive and sustainable tourism destinations in the world. The expansion of marine resources is an integral aspect of the National Ocean Strategy for 2013-2020 (Government of Portugal, 2014)

### 1.2.3. THE ECONOMY OF THE SEA

From the beginning of the 21st century, the Portuguese Government began a very pragmatic encounter on the defense of the ocean, executing several programs in recognition of the rightful importance of the ocean, by implementing numerous studies and approving numerous legal instruments. Globally, the ocean has been recognized as a vital source of livelihood. In 2019, coastal regions, including the oceans, contributed about 43 percent of the EU gross domestic product (GDP) through tourism, ocean energy and shipbuilding (European Commission, 2019). As of 2019, the oceans were also a source of livelihood for 214 million

people within the EU (European Commission, 2019). In Portugal, the ocean contributes about five billion euros to the economy, which is equivalent to a gross added value of 2.6 percent of the national economy (De Vere Portugal, 2018). The percentage contribution of the oceans to selected economies in the EU region is shown in Figure 7; the bar graph shows that the contribution of oceans to the economy of Portugal is higher than France and Ireland but lower than the UK and Holland (Migueis, 2018). However, the ocean economy employed more people in Portugal than any other country in the EU, as per Figure 8.

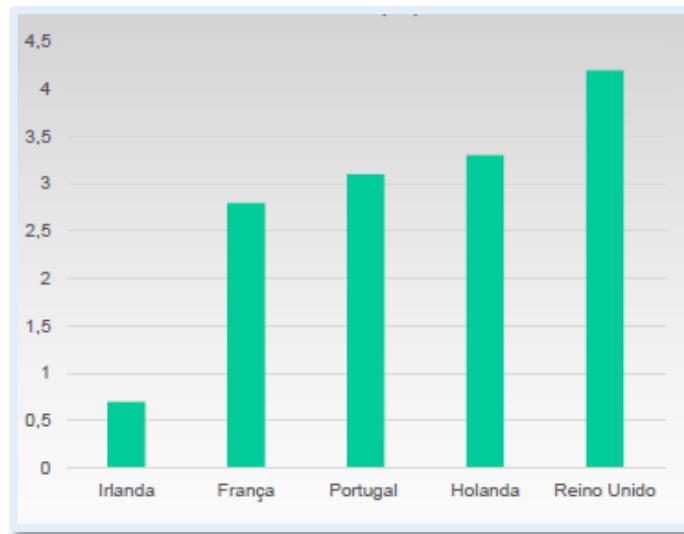


Figure 7: Percentage contribution of the oceans to the economies of EU states (Migueis, 2018)

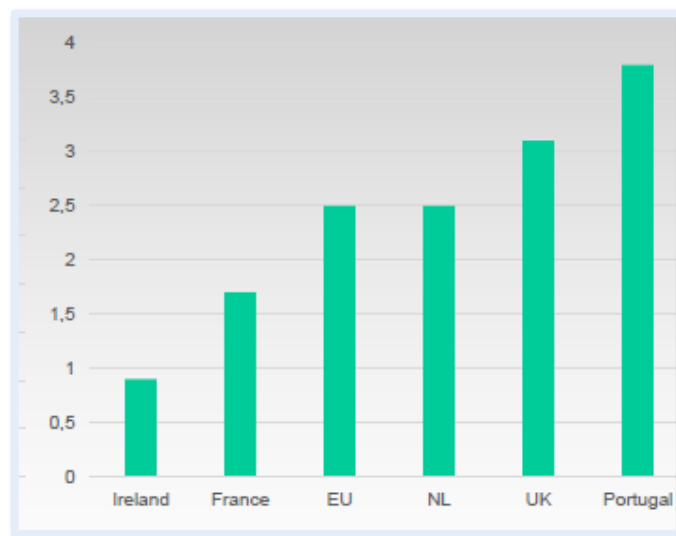


Figure 8: Percentage of ocean-based employment per country (Migueis, 2018)







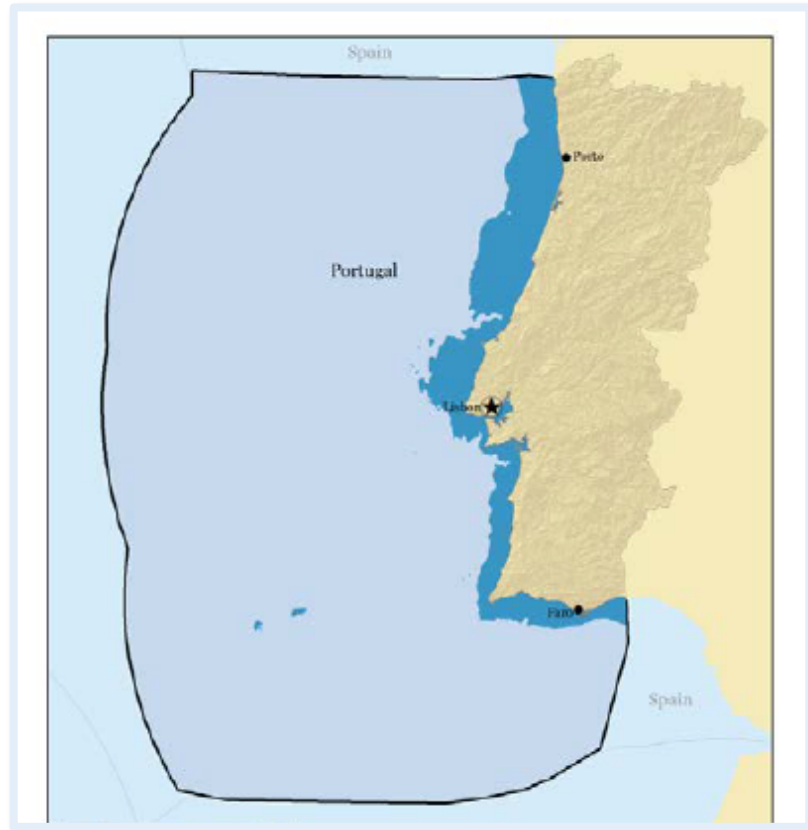


Figure 10: Map of the Portuguese EEZ (Leitão et al., 2014)

The challenges associated with the expansion of the EEZ and the exploitation of the ocean resources were partly addressed through the maritime spatial planning (MSP), which was developed between 2009 and 2011 (European MSP Platform, 2018); the MSP was not just a maritime planning instrument but also a study on the activities taking place within Portugal's maritime borders.

The perception is that the National Ocean Strategy is the main policy instrument that is capable of addressing the unique challenges facing the sector and subsequently enhancing sustainable development. The MSP creates a new framework for the active exploitation of marine resources and a model for the development of coastal areas and ocean resources, enabling Portugal to increase the competitiveness of the maritime economy and promote the growth of other sectors. The adoption of the National Ocean Strategy Program for 2013 to 2020 has the potential to increase ocean tourism activities in the future and enable Portugal to become a competitive maritime economy. The above observation is grounded on the fact that the National

Ocean Strategy is a new model for coastal areas that is structured so as to enhance growth and promote local sectors.

Another critical effort that has been initiated to enhance the sustainability of the maritime economy; “Fazer acontecer o mar” is the motto of the Ministry of the Sea, which defines the purpose in the national budget for 2019 (Government of Portugal, 2019) to facilitate the internationalization of the ocean economy. This would be achieved through the redefinition of Portugal's role in the governance of global oceans.

#### **1.2.4. THE OCEAN AS A LOCAL APPEAL FOR TOURISM**

The ocean supports both coastal and marine tourism in Portugal and beyond. Portugal's ocean resources are the most extensive in the EU – a factor that has made Portugal an ideal destination for tourists, with its long coastline along the Atlantic ocean (Moreira, 2019). The diverse ocean resources are complemented by unspoiled and a visually appealing landscape (36 protected areas and Natura 2000 network occupying 23% of the country) and a vast historical and monumental heritage. The above factors help to explain why Portugal was ranked as the world's leading destination for tourists in 2017 and 2018. In 2017, the country's beaches were ranked as the best in Europe (Moreira, 2019). Globally, and according to WEF Travel & Tourism Competitiveness Index 2019, the country was ranked 1st in Tourist Service Infrastructure and 12th in terms of competitive tourism. (See 1 – Appendices A)

The Government of Portugal has adopted new measures to diversify its source of tourists, given that the flow of tourists is dependent on the state of individual national economies (Moreira, 2019). The goal is to increase the tourism from long distance origins (US, Canada, Brazil and China) with longer permanency stays in the Country (Vieira, 2019 – Economy Minister). The diversification of the tourist sources is in line with the Tourism Strategy 2027, which also aims to enhance economic, social and environmental sustainability in the tourism sector (One Planet Network, 2019a). According to the Government's blueprint, economic and environmental sustainability would be achieved by increasing the number of tourist overnight stays to about 80 million and the integration of water and energy efficiency in tourist facilities (One Planet Network, 2019a). Apart from the seasonality of the tourism, there are other challenges (such as knowledge gaps, access to EU funds, fragmentation and environmental pressures) which have constrained the growth of the sector (European Commission, 2014).

## **1.3. TOURISM**

### **1.3.1. INTRODUCTION**

This section defines the concept of tourism, travel and tourism economic impact, tourism in Portugal, environmental protection and the effect of the sharing economy as well as sports tourism. The UNWTO groups tourism activities into cultural, ecotourism, rural, adventure, health and wellness, medical, business, gastronomy, coastal, marine and inland, education, mountain, and urban tourism. Coastal and adventure tourism best define the tourism patterns in Portugal.

### **1.3.2. DEFINITION OF THE CONCEPT OF TOURISM**

A tourism destination is a physical location offering tourism products and services, which are of interest to the tourists and the tourism value chain (UNWTO, 2019). In the current context, Ericeira municipality is a destination for surf tourism (Teixeira, 2017b). The quality of the tourism destination predicts market competitiveness. For example, Ericeira offers unique beach breaks, surf spots and big waves, which appeal to surf tourists from all over the world. Moreover, multiple options are available such as participating in surf sports, watch surfing sports, experience local cultures and marine biodiversity, or sample local Atlantic delicacies (Save the Waves, 2011). Mafra Monastery, only 10 kms from Ericeira, was declared a UNESCO World Heritage Monument on 7th July 2019.

### **1.3.3. TRAVEL AND TOURISM ECONOMIC IMPACT**

Tourism offers multifaceted benefits to global economies, such as sustainability, inclusive growth, sharing economies, global citizenship, foreign exchange, cultural preservation, jobs, development, peace and security, and substantial contribution to the GDP (Bianchi, 2017; Salvioni, 2016). Tourism contributed to environmental protection, 30 percent of the global service exports and 7 percent of the global exports, as indicated in Figure 11 (UNWTO, 2018).



Figure 11: Why tourism matters to the global economy (UNWTO, 2018)

The data provided by Turismo De Portugal is consistent with the following observations made by Cardoso (2018). Tourism is a strategic activity in the national economy of Portugal. Between 2011 and 2017, the tourism revenue increased from 4.6 to 7.8 percent of the GDP (Turismo De Portugal, 2016). The percentage of the population employed in the tourism sector also increased from 6.2 to 7 percent. The tourism sector has contributed to a positive trade balance of 10.8 billion Euros, based on the value of the total goods exports (28 percent) and the total service exports (50.1 percent) (Cardoso, 2018). The tourism revenue recorded in 2018 was the highest recorded in the history of tourism in the country. Current estimates show that the country hosts at least 10.3 million tourists, mainly from the EU and more recently, the US and Brazil (Moreira, 2019). The tourism receipts obtained from tourism are presented in Figure 12; it is of note that Portugal's performance is comparable to advanced economies such as France, the UK, and the US.

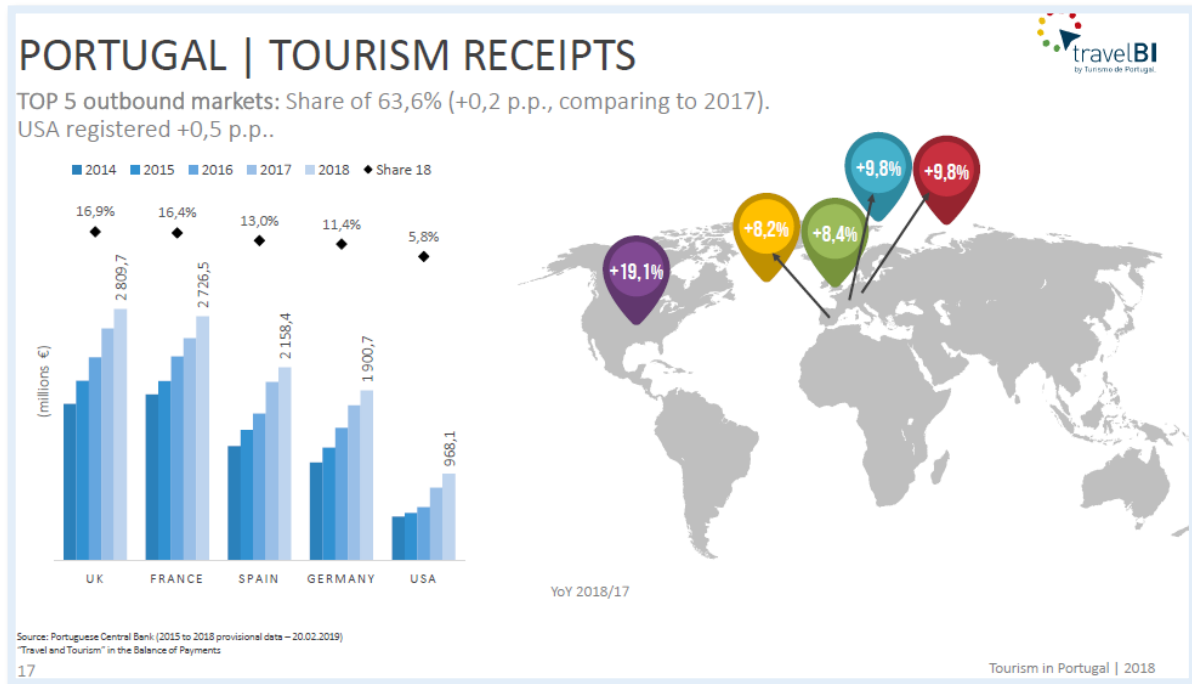


Figure 12: Tourism revenue in Portugal

The growth illustrates that the tourism sector has continued to experience sustainable growth over time. Therefore, the adoption of the National Ocean Strategy 2013-2020, Tourism Strategy 2027, the MSP and the establishment of the Ministry for the Sea, would sustain this growth and also increase the country's competitive advantage in the tourism sector relative to other nations within the EU. In 2018, the best performing sectors in the tourism industry were safety and security, tourism infrastructure, prioritization of travel and tourism, cultural resources and business travel (Cardoso, 2018). The progress listed above justifies Portugal's ranking as the third-best tourist destination in the Mediterranean region and the seventh best among the EU member states.

#### 1.3.4. TOURISM IN PORTUGAL: GROWTH AND RELEVANCE FOR THE ECONOMY

Tourism activities offer multiple benefits to global and national economies. Such factors formed the Government of Portugal's classification of tourism as one of the strategic areas for investment, based on its contribution to the national economy. Other studies estimate that the contribution of the tourism sector to the labor market is as high as 21 percent, given that about one million people were directly or indirectly employed by the sector (World Travel and Tourism

Council, 2019a). According to the data in Figure 13, tourism revenues were equivalent to 8.2 percent of the GDP and 18.6 and 51.5 percent of the global exports and service exports (Turismo De Portugal, 2018). The contribution to the national economy was correlated to the increase in tourism numbers as quantified by passenger arrivals. At least 27 million passengers arrived in the country, which is equivalent to a 6.7 percent increase.



Figure 13: Importance of tourism to the economy of Portugal (Turismo De Portugal, 2018)

Apart from the direct contribution to the tourism revenue and its direct contribution to the national GDP, the tourism sector recorded a 3.8 percent increase in hotel room guests, reaching 24.8 million. The increase in guests had translated into a 1.7 percent increase in overnight stays and lodging revenue (Turismo De Portugal, 2018). Between 2017 and 2018, the tourism sector recorded a 7.9 percent increase in tourism revenue, which turned into about 2,953 million Euros, as shown in Figure 14 (Turismo De Portugal, 2018). In brief, it can be assumed that the tourism sector can sustain its growth momentum.



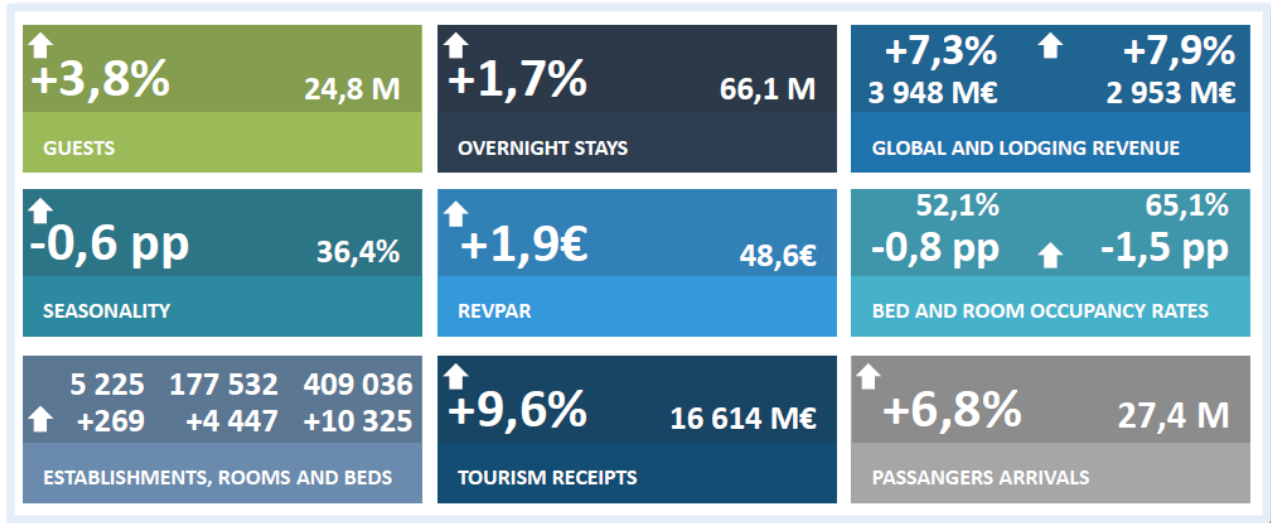


Figure 14: Growth performance of the tourism sector (Turismo De Portugal, 2018)

The annual contribution of tourism to the national GDP is illustrated in Figure 15; it is worth noting that the tourism revenues have averaged between 4.6 and 7.8 (Cardoso, 2018). In 2018, the tourism sector in Portugal expanded by 8.1 percent; cumulatively, it contributed \$45.5 billion to the economy of Portugal. The value of the economic contribution in that year was equivalent to 19 percent of the cumulative economic activity in the sector – the highest contribution reported by any country within the EU (World Travel and Tourism Council, 2019a). The performance of the tourism sector in Portugal was better than the continental average – the tourism sector within the EU grew by an average of 3.1 percent. In 2019, it is forecast that the sector will grow by an average of 5.3 percent, which is nearly double the EU growth rate of 2.5 percent (World Travel and Tourism Council, 2019a). The projected trends illustrate that the growth rate of the tourism sector in Portugal will retain its lead over other economies within the European Union.

In 2019, the World Travel and Tourism Council (2019a) reported that out of every five Euros generated by the economy, the tourism sector contributes one Euro. Similarly, the sector makes a similar contribution to the labor market. The contribution to the national economy and the labor market illustrate that the tourism sector is vital to the economy of Portugal. The economy of Portugal is ranked 25th globally.





Figure 15: Tourism revenue as a fraction of the GDP (2011 to 2017) (Cardoso, 2018)

### 1.3.5. THE EFFECT OF THE SHARING ECONOMY (PEER-TO-PEER MODEL)

Beyond technology, the growth of the sharing economy has been supported by societal (generational altruism, sustainability, and population density) and economic factors (excess inventory, financial flexibility, ownership, and capital funding) as indicated in Figure 16 (Barbosa, 2017).

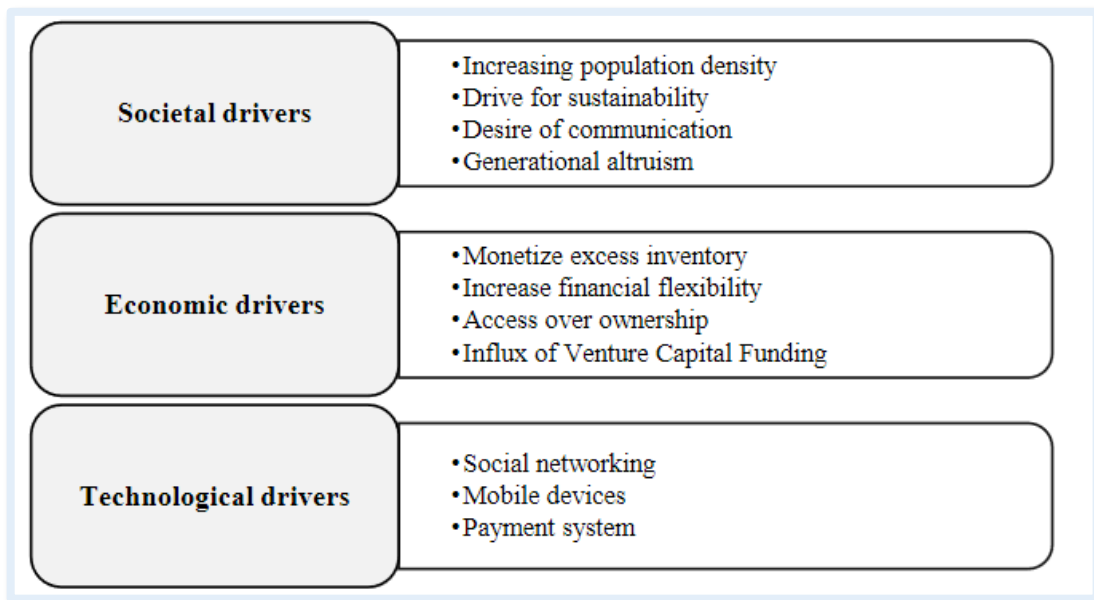


Figure 16: Drivers for the sharing economy in the tourism industry and beyond (Barbosa, 2017)

Technological innovation has contributed to high operational flexibility, market reconfiguration, and lower operational costs (due to the absence of fixed costs). Another principal merit of the sharing economy is the elimination of the role of intermediaries in the tourism supply chain and market reconfiguration. The sharing tourism model depicted in Figure 17 illustrates that the supply of peer-to-peer facilities is augmented by pairing demand with supply, elimination of the information asymmetries, and creation of affordable packages (Salvioni, 2016). The trend has been reported in Portugal; Airbnb recorded a 120 percent growth in the country; this is an illustration of higher consumer acceptance. In particular, 264,000 Portuguese nationals relied on Airbnb peer-to-peer shared accommodation at home and abroad (Barbosa, 2017). Despite the increase in demand, uptake of the sharing economy in Portugal is low compared to other developed economies.

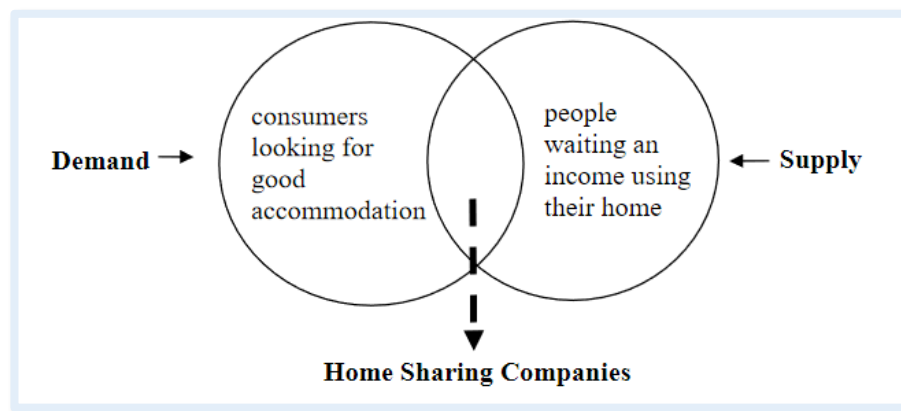


Figure 17: Accommodation sharing models (Salvioni, 2016)

The data obtained from the Mafra Tourism, Culture and Sport Department illustrates that there are 506 accommodation units in Ericeira but only 1.3% are hotels; (as shown in Figure 18). The numbers are in agreement with the Airbnb website, which lists more than 300 lodging units local accommodation in Ericeira, and Booking.com, which confirms that there are 429 units; seven hotels, with the remaining being apartments, holiday and guests hotels, and villas.

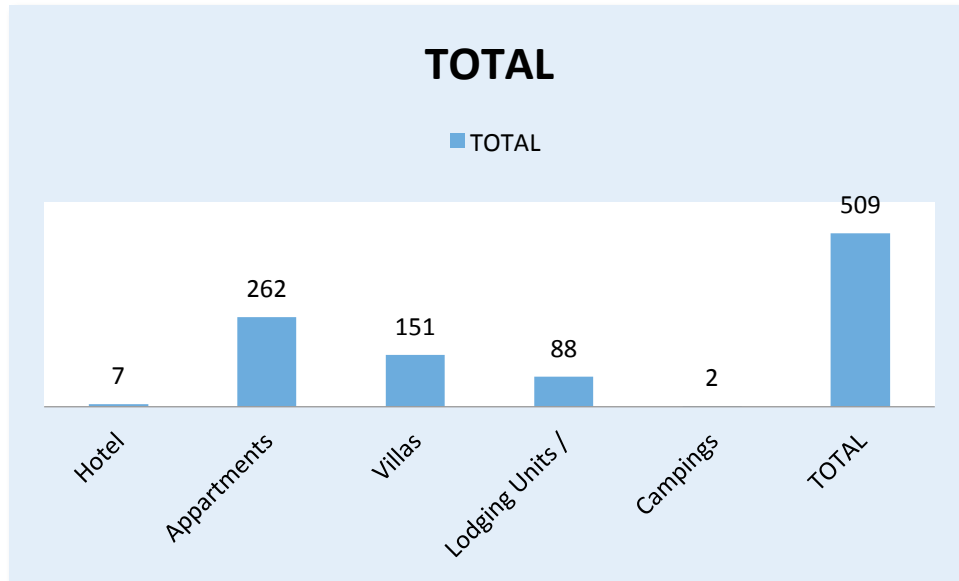


Figure 18: Number of accommodation facilities

Maфра released, in the meantime, the information that 1.106 peer-to-peer units (local accommodation) are operating in Ericeira and its parishes in 2019, being 50% only for surfers housing. Stakeholders in the Portuguese tourism supply chain have developed mechanisms to address the regulatory constraints. Firstly, legislation was enacted in 2014 to provide a regulatory framework for monitor tax compliance and service quality monitoring. Owners of the peer-to-peer facilities are obliged to declare the status of their operations on the Turismo de Portugal platform (OECD, 2016).

### 1.3.6. ENVIRONMENTAL PROTECTION FOR SUSTAINABLE TOURISM

Even though traditional tourism has been frequently associated with adverse ecological effects, it has positively contributed to the global economy through the preservation of local cultures, environmental management, direct financial contributions to nature/wildlife parks, and ecological awareness. Direct financial contributions, in the form of entrance fees paid tourists or tour companies, to wildlife parks are one of the direct means through which tourism contributes to the global economy. The revenues acquired from the tourism activities can contribute to the protection of endangered ecosystems, habitats and the safeguarding of the environment.

Awareness of the issues facing the environment can be achieved by bringing persons in contact with the environment; this might, in turn, result in ecologically conscious behaviors, less pollution of the environment and less expenditure in environmental remediation. Finally, tourism has the potential to contribute to the protection of endangered species and habitats.

The surfing sector has made a tangible contribution to environmental protection, primarily through the Save the Waves Coalition and the World Surf League. The WSL had initiated a campaign about “stopping trashing the waves” – avoiding dumping waste in the oceans, thus reducing CO<sub>2</sub> emissions and safeguarding the quality of surfing areas and the ocean in general (World Surf League, 2019). The campaign also aimed at reducing the use of single-use plastics, thus achieving carbon neutrality. As part of the campaign, the surfers were obliged to make a pledge and post photos affirming their commitment.

The need to safeguard the environment was justified by the degradation of the oceans affected surfing. Global warming has been proven to result in higher acidity, leading to the destruction of the coral reefs. The coral reefs provide beach breaks which are integral to surfing. Additional measures recommended by the WSL to achieve carbon neutrality included staking (to complement driving), carpooling in place of individual driving, and using public transport. From a long term perspective, the above measures also required the development of appropriate policies and the election of pro-environment leaders, supporting companies which are environmentally responsible, and investments in clean energy, such as geothermal (World Surf League, 2019b).

However, the involvement of government agencies is key to the sustainability of these initiatives. In 2018, Portuguese NGOs reported that private developers in Ericeira were encroaching on the ocean beaches, leading to the possible destruction of flora and fauna (Azul-Ericeira-Mag, 2018a). To note, the encroachment may be as a result of lack of restrictions, legislation, and policies. This issue has been partly addressed by the Ericeira Surf World Reserve Management Plan 2018 /2019, developed by the stakeholders of the Ericeira World Surf Reserve (Azul-Ericeira-Mag, 2018b). The management plan intends to address the surge in surf schools in the area, restricting the activities of the surf operators and erecting physical barriers to limit the size of vehicles entering the reserve. Other measures, such as the management plan for 2018/2019, were implemented to address environmental degradation:

The Ericeira Surf World Reserve Management Plan 2018 /2019 has six objectives, namely environmental sustainability, EWSR legal framework, economic sustainability and infrastructure, local culture and identity, consciousness and public awareness, brand and promotion of the EWSR. The environmental sustainability aspect involves the treatment of residual waters, the monitoring of the system for failure alert, the creation of a best environmental practices guide for the promoters of events in the EWSR, in conjunction with the waste collection services and the construction of the EWSR Green Park.

Following the acquisition of 150,000 m<sup>2</sup> of land which extends from Empa Beach to Fort Mil Regos, the World Surf Reserve has established a new green area as shown in Figure 19. This area will help preserve the coastal strip and the quality of waves. Beyond environmental preservation, the green area should contribute to the development of a new leisure area and enhance the tourism potential of the reserve.



Figure 19: Shaded area acquired by the EWSR

Based on the above information, surfing businesses should first take into consideration the protection of natural habitats, by preventing projects that interfere with the quality of the waves, natural marine environment, quality of the water, access and occupation on land and the sea.

In addition, issues concerning waste contamination and their impact on the landscape should be addressed. The Management Plan of the EWSR and the foreseen construction of the Green Park are the first steps to safeguard the natural environment and economic benefits. To point out that Ericeira is subject to a permanent supervision of Save the Waves Coalition via the Ongoing Management and Evaluation Program. It assists as a model for preserving the wave breaks and the surrounding areas to protect the key environmental, cultural, and economic and community features.

### **1.3.7. SPORT TOURISM**

Sports tourism and sports events in Portugal are integral to the sustainability of the sector. Sports tourism has the potential to counterbalance the fluctuation in the number of tourists during the off-peak season. The exploitation of sports events and sports tourism could help sustain the growth recorded in the sector.

The history of sports tourism in Portugal has its origins in the 1990s, as more tourists began to participate in physical activities (directly or as spectators). The sports tourism activities are grouped into nostalgia, event sports tourism and active sport tourism. Nostalgia tourism is limited to museum and stadia, while active sport tourism involves active participation by the tourists in sports events.

According to Alrou, the most popular sports in Portugal are football, futsal, roller hockey, basketball and handball (Alrou, 2013). The growth of the five sports in Portugal has been enhanced by the popularity of globally acclaimed sports people such as Cristiano Ronaldo, Luis Figo and other sports legends. Similarly, the performance of the national teams has reinforced the popularity of the leading sports.

Sports events have assumed an integral role in the economy of Portugal and the tourism sector. The relevance of the sports events is reinforced by the diversity and internationalization of sports. Historical accounts indicate that Portugal began to host international sports events in the 1960s. In 1967, the country hosted the TAP Portugal Rally (Rally de Portugal, 2017), that later

became one of the World Championship rallies in 1973 and was subsequently ranked as the best rally event at least five times.

Large events with worldwide projection such as the Expo98, Football Euro 2004, World Sailing Cup—Olympic classes 2007, Volvo Ocean Race 2012 stopover, Portugal pro Golf Tour, Millennium Estoril Open (ATP 250 Tennis Tournament), Rally de Portugal (FIA World Rally Championship (WRC) and of course the Surf MEO Curl Pro Portugal and the World Surf League Tours, have given prominence to Portugal as a tourism and a sport tourism destination. Data from Visit Portugal illustrated that sports events, such as the Rip Curl Pro Portugal, attracted international tourists (Drughi, 2019). According to Turismo de Portugal, the economic impact of the World Surf League Event in Peniche in 2017, had an estimated impact of 10.7 million Euros: the private investment needed to host the event is estimated to have been € 500.000 for restaurants to reconvert the spaces, and 11 million Euros for hotels to refurbish and upgrade their units (Source: Municipality of Peniche / O Observador)

## **1.4. SURF**

### **1.4.1. INTRODUCTION**

The current section reviews the following themes: the development and growth of surfing and its recognition as an Olympic modality, surfing in Portugal and its growth as well as the essence of surfing events in Portugal and the surfer profile.

### **1.4.2. DEVELOPMENT AND GROWTH OF SURF AND IT'S RECOGNITION AS AN OLYMPIC MODALITY**

According to previous research, there is no specific timeline for the development and growth of surfing in Portugal. Therefore, the development of surfing in Portugal is inferred from the growth of the sport in Hawaii – which is primarily regarded as the birthplace of modern surfing, since the 18th century (Tokyo 2020, 2019; Warshaw, 2019)

One of the first surfing activities in Portugal was recorded on film between 1926 and 1927 in Leça da Palmeira (McCaffrey, 2016). The graphics of this surfing activity are documented in the “Details of Leça de Palmeira, Matosinhos and Leixões” which is one of the earliest documentaries of surfing activities in Europe. Further progress in the development of surfing as a

sport was realized in 1946 when the first body surfing club was established in Carcavelos and Parede (McCaffrey, 2016). The appreciation of surfing as a sport also resulted in greater environmental awareness, especially in the 1960s and led to the establishment of the first environmental movement associated with surfing (Save our Surf) (Warshaw, 2019). The environmental concerns were a result of the negative effect of water pollution, real estate developments, oil spills and crowding on marine ecosystems, and the quality of surfing.

The formal development and growth of surfing in Portugal began between 1987 and 1988. Two key events occurred during this period: Portugal participated for the first time in the Euro surf European surfing championships in 1987 in France (McCaffrey, 2016), and the establishment of the first surfing federation (Federação Portuguesa de Surf) in 1989. In the same year and for the first time, a Professional World Surf Circuit event took place in Portugal. In 1990, Portugal held its first surfing competition in Ericeira, since then it became one of the preferred surfing destinations due to its top-quality waves.

In 2011 Ericeira was recognized, by Save the Waves Coalition, and dedicated as a World Surf Reserve; this was the kickoff for surf being included in successful and important international opportunities. But there is still a long way to go when comparing Portugal to other surf destinations like the US or Australia, that have since the beginning perfectly combined natural resources with the development of infrastructure and business related to surf.

The success of surfing as a sport and tourism product has been reinforced by media publicity (web portals and surf magazines), the emergence of surf guides, surf trips, surf schools and camps. There are specific surf webpages that provide real-time information on the surf conditions in different surfing spots in Portugal and abroad. Beyond the media publicity, the global Olympic fraternity recognized surfing as one of the modalities to be incorporated in the 2020 Olympics (Tokyo 2020, 2019). The decision to include surfing for the first time into the Olympics was made in 2016 by the International Olympic Committee (Olympic Surfing, 2019), and the surfing competitions are to be held at the Tsurigasaki beach in Japan.

In contrast to other sports, waves are not identical. Therefore, surfers will be competing with nature rather than other surfers (Tokyo 2020, 2019). Such complexities and challenges have been partly addressed by the collaboration between the World Surf League and the International Surfing Association (Olympic Surfing, 2019). According to recent reports, the introduction of the surfing modality is expected to transform Australia and other surf destinations into global sports



powerhouses (Dinjaski, 2019). The inclusion of surfing in the Olympics provides a platform for Portuguese surfers to showcase their skills to a worldwide audience.

Only 20 women and 20 men will compete at Tokyo, with a maximum of two athletes per gender per country permitted. On the ISA World Surfing Games 2019, Frederico Morais, earned already the provisional continental qualification to represent Portugal in the Olympic Games 2020. ISA President Fernando Aguerre said at the occasion; "For the first time, every nation brought their surfing dream teams and for the first time, the ISA World Surfing Games is a qualifier for the Olympic Game."

### **1.4.3. SURF IN PORTUGAL, AND ITS GROWTH**

Surfing in Portugal is concentrated in the coastal areas; these towns are located along the 800 km Atlantic Ocean coastline (Surf Holidays, 2019). The following are the surf zones in Portugal; Viana de Castelo, Matosinhos Espinho, Figueira da Foz, Nazaré, Peniche, Santa Cruz, Areia Branca, Ericeira, Carcavelos, and Alentejo, with the Vicentina Coast, and finally Sagres on the south coast, (Surf Holidays, 2019). According to Surf Holidays (2019), each of the listed surf locations provide unique surf environments and different attractions for tourists.

Similar to Cascais, Ericeira is situated close to Lisbon. However, the region has a dozen beaches and better surf spots thus being currently ranked as the only internationally-recognized surf reserve in Europe (Azul-Ericeira-Mag, 2019; Save the Waves, 2011). In brief, it is valid to presume that Ericeira, along with Peniche and Nazaré, are the most advanced and recognized surf villages in Portugal. In common, all three were and still are important fishing communities.

The best season for surfing in Portugal is between September and April; however, the summer season is ideal for amateur surfers (Surf Holidays, 2019). The Summer season is preferred by beginners because the wave swells are less intense during this period. Winter is an ideal season for experienced surfers because the beaches are less crowded during this period, and the powerful swells (and strong waves) are recorded between September and April (Drughi, 2019)

Apart from the strategically located surf-towns, Portugal has the highest number of big waves, as indicated in Figure 20 (Silva, 2017). In 2017, at least 30 big waves were recorded in the country – the highest number worldwide. The number of large surf waves recorded over time is comparable to the US (Hawaii – 6 and California – 24) – the country with the highest

population. Based on the number of the largest surf waves recorded over time, Portugal can compete with the US.

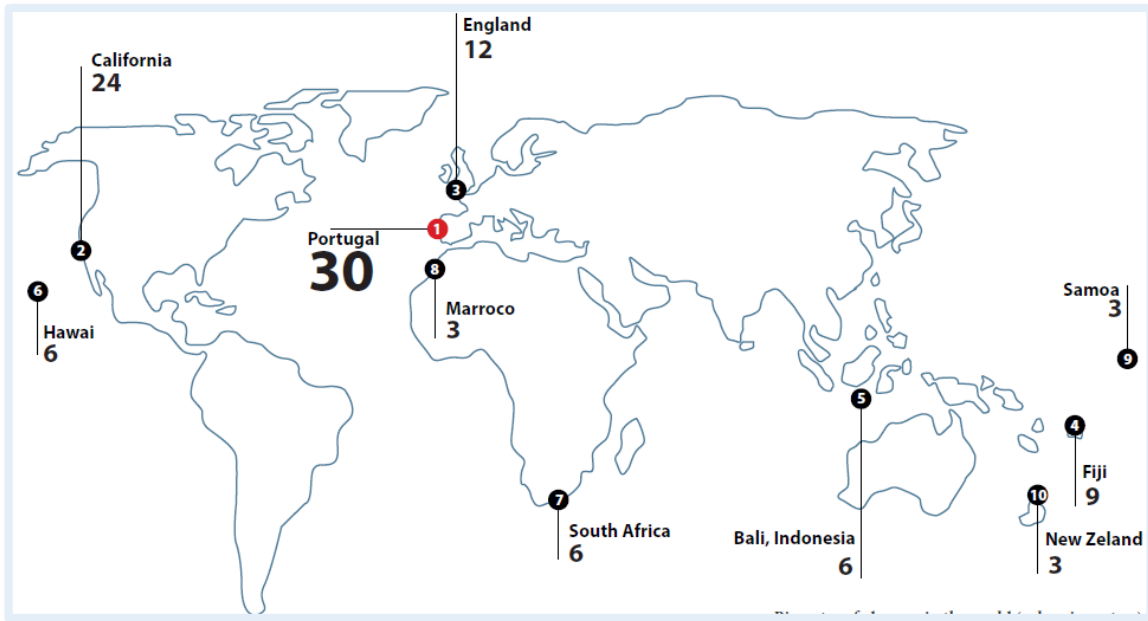


Figure 20: Largest surf waves (Silva, 2017)

#### 1.4.4. THE IMPORTANCE OF SURF EVENTS IN PORTUGAL; THE KICK-OFF FOR LOCAL DEVELOPMENT AND THE RELEVANCE OF THE IMAGE OF PORTUGAL

Portugal Tourism Board, invested €1 million in major, local surfing events in 2018. Luís Araújo notes that international surfing campaigns have had "truly extraordinary growth in 2018 compared to 2017". Turismo de Portugal's investment in 2018 included four events, namely the WTC in Peniche, Nazaré Challenge (Nazaré, part of the giant wave world circuit), QS10000 in Ericeira and WSL3000 PRO in Santa Cruz.

The economic impact of surfing in Portugal needs to be studied further. The National Surfers Association estimated retail sales to have been €400 million in 2012. "The number is certainly higher now," says Luís Araújo. "The surfing market, including all businesses, such as surfboard factories, clothing stores, surf schools or events, have gained more national and international enthusiasts." The head of Turismo de Portugal also noted that "the Moche Rip Curl Pro Portugal of WSL, which takes place in Peniche, generates around 10.7 million euros". Stressing that "in recent years Turismo de Portugal has lent significant support to the surfing

sector." In addition to the promotion of the country as a surf destination, under the motto "Portuguese Waves", Luís Araújo points to the support given to the annual stage of the "World Surf League" in Peniche as another example. The highlight is the recent promotion of the Nazaré wave on a giant outdoor advertising board in Times Square, New York, which Luís Araújo considers "a historical initiative for national tourism and surfing" that had an unprecedented impact on social networks, reaching an audience of 5.3 million people.

The development of the surf section in Portugal underscores the central role of surfing in the tourism economy. Even though surfing is an established sport in the country, it is of note that the development of surfing was less coordinated. In the 1960s, local Portuguese surfers were less organized (Silva, 2017); which led to the domination of the sport by foreign surfers. Moreover, surfing was a sport for the affluent.

In the 1970s, there was a paradigm shift in individual perception regarding the oceans – leading to the democratization of surfing, establishment of the Portuguese Surf Federation, and the organization of the first global championships. The event was held at Carcavelos (Silva, 2017). Since then, Portuguese surfers have been actively involved in global surf events. The democratization of surfing has catalyzed the commercialization of surfing through development of surf schools, surf lodges, surf factories and other support industries.

The importance of surf events in the economy has been reinforced by the superior performance of Portuguese surfers and the involvement of foreign surfers in local tourism events. For example, in 2010 – “Saca” Tiago Pires was ranked as the 29th best surfer in the world (Silva, 2017). Portugal counts in 2019 with one male pro surfer Frederico “Kikas” Morais in the 30th position of the men’s worldwide Qualifying Series Rankings and with one female pro surfer, Teresa Bonvalot in the 40th position of the women’s international rankings (World Surf League).

The impact of the WSL events on the country’s visibility is huge, which generates a high number of likes and views on the social networks; 27 million video views on Facebook, 2.3 million likes posted on Instagram and 7.7 million video views on Instagram. The MEO Rip Curl Pro Portugal 2016 generated 41.6 million views on the WSL website. The ROI on social networks was estimated to be; on Facebook: +194 billion impressions; +136 billion reach, on Twitter: +8.7 billion impressions; +5 thousand mentions and on Instagram: +6.3 billion views. The Nazaré Challenge 2016 generated 3.5 million views on the WSL website and the ROI on social networks was estimated to be; on Facebook: +85 billion impressions; +62 billion reach; on

Twitter: +1.2 billion impressions; +69 thousand mentions and on Instagram: +1.2 billion views. The organizers estimate that more than 20,000 people were in the event zone. The Pro Santa Cruz 2016 generated 780 thousand views on the WSL website and the ROI on social networks is estimated to be: 365 thousand impressions on Facebook and 35 thousand on Twitter 35,000 impressions

Globally renowned surfers, such as Garret McNamara, have also been instrumental to the advancement of surfing as a sport and culture, by establishing new world records at Praia Grande. Global and local surf performances and competitions have drawn global attention to surfing towns in Portugal. Natural phenomenon, such as the seven waves of Ericeira, have enhanced the aesthetic and visual appeal of the country (Silva, 2017).

Surf Out Portugal is a private initiative started in 2018 aiming to bring awareness of the importance of surfing in all its dimensions; the first event gathered athletes, local and governmental entities and the surf industry as an exchange of ideas and objectives and open to the public as well. Already in 2019 arose the debate “And after the boom?” as an alert to the necessity of legislation and implementation of measures to preserve surfing in Portugal. Surf Talks by Turismo de Portugal, were the pillar of the second Surf Out Portugal Event held in 2019, gathering several personalities of the business and surf areas for an analytical discussion of the modality in the future for a solid positioning of Portugal ‘surfing globally.

#### **1.4.5. SURFER PROFILE**

The analysis of the attributes and profile of the surfers is central to the growth of surfing in Portugal because surf tourists are selective. According to recent research, most of the surfers in Portugal are young (about 30 years) (Salsinha, 2019). Moreover, they are highly educated and have high disposable incomes. This is consistent with the results of the investigation done for this work in Ericeira.

The higher income per tourist translates to more expenditure per trip and better revenue for the tourism service providers. However, the revenue per tourist is dependent on the tourism arrangement; tourists in the VFR category spend less because they cost share accommodation and meals with their hosts (MacEachern, Dongkoo, Macdonald, & Hennessey, 2007). Apart from the VRF (visiting friends and relatives) category, it is of note that the tourism patterns are also

influenced by whether the tourist is an independent traveler or reliant on tour companies and travel agents (Dolnicar & Fluker, 2003). The segmentation of surf tourists would enable service providers to provide better and customized services.

Other essential attributes of surf tourists are gender and surfing segments (leisure, passionate, and professional). An issue of concern is the significant gender imbalance in the sector – 93 percent of the tourists are male (Salsinha, 2019). However, it is anticipated that the gender imbalance will be addressed by the growing popularity of the sport among women (CBI Ministry of Foreign Affairs., 2019). Beyond gender, professional, passionate, and leisure, surfers have unique requirements that should be addressed by the service providers.

Tourists under the leisure surfing category engage in other activities apart from surfing. Therefore, the cultural experiences, destination attractiveness, and gastronomy experiences are essential for tourists in this segment. Other activities that are explored by the surf tourists include yoga, the learning of new languages, canopy tours, paragliding and snow kiting, among other adventure activities (Salsinha, 2019). Each of the non-surfing events contributes to the tourism revenue and also sustains support industries in the tourism sector.

Even though the leisure tourists engage in multiple activities, it is of note that they spend less on accommodation. The above claim is grounded on the fact that the surfers book resorts with less spacious accommodation (Salsinha, 2019). In brief, affordable housing is a critical requirement

for tourists in this category. The attributes of the leisure surf tourists contrast with passionate and professional surfers, whose primary motivation for travel is surfing. In particular, the tourism patterns of professional surfers are correlated with surfing events such as world circuits. Salsinha (2019) notes that professional surfers are the most crucial for the surf tourism segment because they attract non-surfing tourists who are spectators in world circuits.

The surfer profile discussed above is further reinforced by information from a survey conducted for this investigation and described in the next section. According to the data in Table 1, Ericeira was preferred by local tourists as per the 2018 data. In 2018, 14,989 tourists visited the town. Apart from the local tourists, there was a significant number of foreign tourists, primarily from France (n = 4,200) and the UK (n = 3,212). The tourism trends in Ericeira are consistent with OECD and Instituto Nacional de Estatística data. The two organizations noted that most of the tourists in Ericeira originated France, Germany, and the UK.

Table 1: Number of visitors in Ericeira and nationalities

<b>Origin</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>Total</b>
Portugal	7854	17109	18567	14755	13794	15027	19399	17046	14989	118616
UK	1445	1693	2700	2897	2759	4122	3109	3099	3212	22717
France	1463	3411	5421	7642	9472	6669	5220	5246	4200	44614
Spain	1575	3044	3466	5701	7188	3764	3073	2791	2578	28985
Germany	811	1512	2988	3821	5118	3161	2427	3132	2984	24186
Italy	145	323	453	687	916	372	327	462	356	3647
USA	30	301	616	823	1112	605	380	516	490	4732
Brazil	123	349	392	285	518	374	449	681	873	3900
Others	2148	5608	6466	8214	7248	6127	5842	6351	5836	47294
<b>TOTAL</b>	<b>15594</b>	<b>33350</b>	<b>41069</b>	<b>44825</b>	<b>48125</b>	<b>40221</b>	<b>40226</b>	<b>39324</b>	<b>35518</b>	<b>298691</b>

## **1.5. - ERICEIRA - RESEARCH ANALYSIS & RESULTS**

### **1.5.1. INTRODUCTION**

This chapter embraces the results of the investigation on Ericeira approaching the local surfing economy, the profile of the surveyed surfers, local business and surf schools as well the perception of locals and tourists towards surfing.

### **1.5.2. LOCAL ECONOMY**

Mafra municipality has attracted both international and local tourists; it is near to Lisbon and served by a good road network of highways. Other key strengths include security, a higher quality of life, schools which are open to the community and the proximity to the Atlantic Ocean,

as shown in Figure 21. According to the map, the Mafra municipality is located in Central Western Portugal, adjacent to the Atlantic Ocean. Moreover, Ericeira Surf Reserve is located within the Mafra municipality and the ocean has contributed to economic growth through surfing and coastal tourism and sports.



Figure 21: Location of Mafra/ Ericeira in Portugal

Fishing has always been one of the economic activities that most helped to shape the Portuguese coast and Ericeira, in particular, over the centuries. The village has developed enormously during the 20th century due to the growing interest as a summer holiday resort. Throughout the years, the economic activity of the village is connected to the sea, initially due to fishing, (which is still a very important economic activity) later due to the beach tourism, and more recently with the spread of nautical sports, particularly surf.

The economic data in Figure 22 shows that the municipality of Mafra has recorded an increase in the population, from 55,259 in 2001 to 82,935 in 2017. The population growth is also illustrated in Figure 45. In the last five years, the municipality has recorded a marginal increase in unemployment, from 2.1 to 3.6 percent. The financial budget for the municipality was 1,853.4 million, and 30 percent of the population has social security, as shown in Table 2.

The economic data in Table 3 illustrates that there has been an enormous increase in the local economy as evidenced by the rise in town council finance budget. Between 2011 and 2017, the budget increased from 115,000 to 1,863,000 Euros. The growth in the local economy has resulted in tangible economic benefits including a decline in unemployment from 4.9 to 3.6 percent and a marginal increase in social security and PARF Pension uptake.

In brief, the economic data suggests the standard of living is high. On the downside, the community does not have sufficient support systems for the elderly, and healthcare remains a challenge. Moreover, available employment is seasonal, in line with tourist arrivals.

<b>Mafra (Municipality)</b>	<b>2001</b>	<b>2011</b>	<b>2017</b>
Population	55,259	77,452	82,935
Parishes	17	17	11
Elderly per 100 young people	95.0	76.2	90.6
% unemployment registered (in population aged 15 - 64 years)	2.1	4.9	3.6
Social Security and PARF pensions as % of population	-	29.2	29.6
Town Council financial balance (thousand €)	-	11.5	1,853.4

Table 2: Economic Data of Mafra Municipality

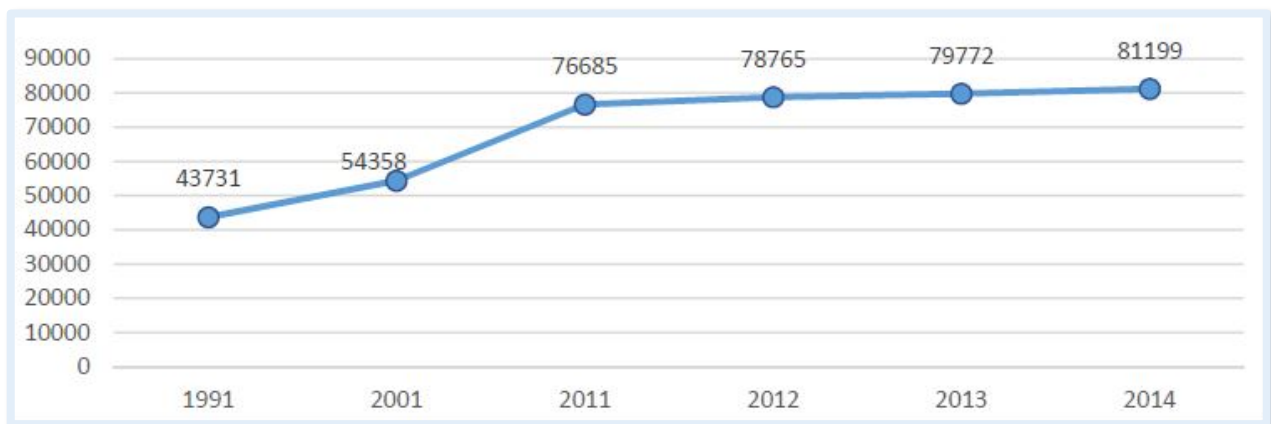


Figure 22: Changes in the resident population



According to current research, the growth of surfing in Ericeira was accompanied by a change in mentality (Teixeira, 2017a), which was necessary, considering that the local population did not consider surfing as a lifestyle or income-generating activity. The change in perception was augmented by multiple factors, including the ideal surfing conditions, the establishment of surf-related businesses, hosting of national and international competitions as well as the growing media attention on surfing (Teixeira, 2017a). The media focus on surfing mediated social acceptance of surfing as a sport and income generating sector.

Ericeira hosts annually several surf events; Ericeira Surf Club Tour Stages x 3 (200 participants); Ericeira Bodyboard Surf Club Tour Stages x 3 (60 participants); Youth Regional Surf Tour Stage and Youth National Surf Tour Stage Sub 18 (with 70 and 32 participants), the National Surf PRO Tour Stage - ANS (80 Participants); the National Longboard Tour Stage (30 participants), National Bodyboard Youth Esperanças Tour Stage and the National Bodyboard PRO Tour Stage (with 60 and 70 participants); Austria's National Championship (40 participants) and the Ericeira Paddle Trophy (70 participants). The most relevant and most impacting events are the Qualifying Series Tour Stage - WSL 10000, with 120 participants and approximately 2.500 watchers and the National Portugal Surfing 2018 and 2019 Cups with 18 clubs, 300 athletes with a daily attendance of approximately 500 spectators during 5 days.

The acceptance of surfing led to the emergence of professional surfers, surfing schools, and surf tourism; the local population saw itself also committed to this new lifestyle and was asked to participate; old fashioned shops were subject to a modern make over; restaurants adapted their offer to this new public, the relaxed and simple surfer's life style was being translated into this new commerce approach. The surf events have attracted thousands of tourists over time and also led to the establishment of support industries, such as surf equipment manufacturing. The decisive growth point was the dedication of Ericeira as World Surf Reserve in 2011 and all the inherent multiplication factors, as shown in the next tables. The data concerning the Mafra council is shown in Table 3.

Table 3: Mafra council data

	2001		2011		2017	
	Mafra Council	Portugal	Mafra Council	Portugal	Mafra Council	Portugal
Unemployed registered in employment centers	796	324.680	2.476	551.944	1.964	434.462
Accommodation and Food&beverage companies	-	-	568	85.802	821	104.826
Hotel Establishments	-	-	6	2.019	34	5.840
Capacity of the Hotel Establishments	-	-	619	289.107	1.391	402.832
Guest at Hotel Establishments	-	-	40.789	13.992.782	74.641	23.953.765

**Sources**  
INE, APA/MA, BP, CGAMTSSS, DGAL, DGEEC/MEd, DGE/MEC, DGO/MF, DGP/JMJ, DGS/MS, ICA/SEC, IIEFP/MTSSS, IGP, IIMTSSS, ISS/MTSSS, SEF/MAI, SGMAI, SIBS  
© PORDATA

Source: Pordata 2019

As a parish, access to official information on the reduced area of Ericeira is a challenge; this explains the need to collect economic data from private companies. Research is extremely difficult to perform due to the lack of data and information available. Governmental departments and local entities still do not have separate records for the surf industry; from surfers or surf tourists expenses and visit durations, to retail sales on surf gear and clothes, to shapers or figures on manufacturing of surf equipment. This does not enable a comprehensive economic analysis. It is however common agreed and accepted that the growth of the industry has led to an increased focus on the impacts and market importance of the activity.

The results of the information collected from Informa D&B Portugal are depicted in Tables 4 and Table 5 and translate the enormous growth of economic growth in Ericeira after it has been declared as a World Surf Reserve in 2011. This applies not only the revenues itself but also to the employment increase. The data includes only the companies registered in Ericeira with the electronic filing of the IES/DA. The data in Table 4 highlights the number of accommodations, food and beverage companies, hotel establishments, capacity and unemployment.

Table 4 Hotels, accommodation units and restaurants

Year	Active Companies	Revenue	Number of employees
2011	29	€ 7.564.236,87	178
2017	88	€ 23.449.989,63	540

Retail grocery and supermarket revenue is shown in Table 5. The growth of commerce and retail sales in sports, leisure and specialized surf shops is illustrated in Table 6

Table 5: Retail sales in supermarkets and hypermarkets

Year	Active Companies	Revenue	Number of employees
2011	1	€ 2.043.514,64	28
2017	3	€ 38.744.088,69	296

Table 6: Retail commerce for sport, camping and leisure goods in specialized shops

Year	Active Companies	Revenue	Number of employees
2011	1	€ 62.271,50	n/a
2017	3	€ 26.512.822,72	311

### 1.5.3. PROFILE OF SURVEYED SURFERS IN ERICEIRA

The results of the investigation are shown in graphs 1 to 31 in Appendices A. The survey established that 24.4 percent of surfers were aged 25 years and below, and 36.6 percent were aged between 26 and 30 years. Seventy- eight percent of surfers were male, and 87 percent had higher education. Half of the surfers had an annual income of 10,000 to 20,000 Euros and only 19.5 percent earned more than 50,000 Euros, it is of note that 61 percent of the surfers were Portuguese. The data in Appendix 1 and 2 illustrates that 48 percent of the tourists made up to five trips to Ericeira. Similar observations were made in Appendix 2 during summer. According to the pie chart in Appendix 8, more than half of the inquired surfers (55 percent) had visited Ericeira before. All sampled respondents intended to visit Ericeira again. The average number of days spent in Ericeira was five. The appeal of Ericeira among tourists is also illustrated by the number of days spent in the surfing reserve; Appendix 9 shows that surf tourists spent up to five days in the area. The average expense was between 50 and 100 Euros for one-third of the tourists.

The sampled surfers noted that they spent more on food and beverages, compared to accommodation and travel. The primary source of information related to Ericeira was obtained from friends (78 percent) and the surfing culture reputation (55 percent). Their residence status also mediated the knowledge of surf culture - 73 percent of the respondents were legal residents of Ericeira.

The preferred type of accommodation among surf tourists is friends' homes, followed by Airbnb and hotels at 30, 20, and 20 percent respectively. The demand for accommodation is in line with the sharing economy: a phenomenon which has been reinforced by ICT (information, communication, and technology) and multi-sided technology innovations (such as the internet, portable computing devices and online platforms for tourists, such as, Airbnb and Home Away) (Salvioni, 2016).

The shared accommodation with friends and family also reduced tourism-related expenses; 40 percent of the tourists spent zero Euros on accommodation. However, higher expenses were incurred with food and beverage - 95 percent of the surf tourists purchased food from local restaurants. The frequency of food purchases was daily (both lunch and dinner, the average expenditure on food varied between 11 and 50 Euros.

Surfing was the primary motivation for visiting Ericeira, most of the surf tourists opted for road transport and company from friends and family. Forty-seven of the respondents traveled in a group of two persons, and only 17 percent of the surfers traveled alone. The tourists visiting Ericeira also opted not to visit other areas. Moreover, the respondents opted to refuel in Ericeira.

The preferred mode of learning to surf was with friends, and the mean cost for surf lessons was 15 Euros. Three out of four surfers (75 percent) opted to bring their own surf gear, while 56 percent opted to purchase other surf gear in Ericeira at a cost of up to 30 Euros per piece. Additionally, the average expenditure per trip was 51 to 200 Euros for 35 percent of the tourists. In contrast, 29.4 percent spent between zero and 50 Euros. A similar number of tourists spent between 201 and 1,000 Euros per trip. In brief, 94 percent of the tourists spent more than 1,000 Euros per trip. The expenditure profile offers can be used by service providers to develop customized products based on the disposable incomes. Most of the tourism expenses (42.5 percent) were allocated for food and beverages, followed by travel and accommodation at 18.9 and 18.4 percent, respectively. In general, the tourists spent less on surf learning, clothes, and accessories. The primary source of surf information was friends (78 percent) and surf culture (58.5 percent). One in four tourists (26.8 percent) spent 31 to 50 Euros per day; one in three (31.7 percent) spent 11 to 20 Euros. In addition, 17 and seven percent spent 0-10 Euros and 50+ Euros, each day, respectively.

The mean income for the surf tourists was 10,000 Euros to 50,000 Euros for 56 percent of the participants. In addition, 86 percent of the respondents had superior education and 78 percent

were male. Moreover, 64 percent of the visitors to the surf spots in Ericeira were accompanied by a friend or family member and the greatest satisfaction originated from the sea and the waves, which validates Ericeira position as a leading surf destination.

#### 1.5.4. ERICEIRA BUSINESS OPERATORS

As described under Local Economy in Ericeira, one can easily assume that the absolute turning point in the local economy was the period after 2011 matching with the recognition of Ericeira as a World Surf Reserve. The below table 7 gives an overview of the local development:

Table 7: Ericeira Facts and Figures

	<b>1229</b>	first charter granted by the then Grand Master Parish of Ericeira
	<b>1838</b>	43 professional fishing vessels registered in Ericeira
	<b>1910</b>	King Manuel II of Portugal went into exile, leaving the country from Ericeira Praia dos Pescadores
	<b>1987</b>	Foundation of Despomar , the giant on the commercialization of surf equipment , with headquarters in Ericeira
	<b>1996</b>	Opening of the first Ericeira Surf Shop in the village center ( 35 m2 area against 150 m2 are in 2019)
	<b>2006</b>	Opening the first of the 5 hypermarkets active in 2019
	<b>2008</b>	Opening of the highway A21 - Ericeira
	<b>2010</b>	Opening of first on line shop of Despomar Ericeira nomination as World Surf Reserve
	<b>2011</b>	23 professional fishing vessels registered in Ericeira 11 surf schools registered in Ericeira
	<b>since 2012</b>	Opening of the second of the 5 hypermarkets active in 2019 Ericeira Film Festival
	<b>2014</b>	National University's Surf Championship Allianz World Junior Championships 2014 SOS, Save the Surf warning and identification of problems to be solved urgently
	<b>2015</b>	in order to keep the WSR Nomination Social Diagnostics of Mafra Council 2015 Opening of Ericeira Business Factory Opening of EWSR Interpretation Centre
	<b>2016</b>	Announcement of creation of Ecological Park of EWSR Opening of Mafra Business Factory Surf Summit ( event prior Websummit), first edition
	<b>2017</b>	World Junior Championships

2018	<ul style="list-style-type: none"> <li>Red Bull Paddle Trophy</li> <li>Publishment of the Regulation of associations for the Management of EWSR</li> <li>Launch of sculpture " The Guardian"</li> <li>Strategy Plan for Creation and Development of Cluster for Outdoor Tourism in Mafra Council</li> <li>Approval of the Management Plan of EWSR for 2018/2019</li> <li>Announcement Surf Summit will be held for the next 10 years in Ericeira</li> <li>21 professional fishing vessels registered in Ericeira</li> <li>34 surf schools registered in Ericeira</li> <li>Ericeira Surf Club wins the Portugal Surfing Cup 2018</li> <li>WQS 2018- EDP Billabong Pro Ericeira</li> <li>Announcement of the acquisition of 150.000 sqm land for the construction of Ecological Park of EWSR</li> <li>Opening of giant shop of Surf 58 in Ericeira</li> </ul>
2019	<ul style="list-style-type: none"> <li>21 professional fishing vessels registered in Ericeira</li> <li>45 surf schools registered in Ericeira</li> <li>31 companies active and operating at Ericeira Business Factory</li> <li>15 companies active and operating at Mafra Business Factory</li> <li>78 Restaurants</li> <li>22 Bars</li> <li>1.106 peer-to peer units (local accommodation) operating in Ericeira</li> </ul>

According to the survey in locum, accommodation (57.8 percent), surf schools (7.2 percent) and restaurants (18.1 percent) were the most explored business areas. A majority of the surf tourism businesses were relatively new - 78 percent were established between 2011 and 2019. Additionally, 79 percent of the surf businesses had more than one employee and had recorded growth in sales.

The results of the investigation are shown in the graphs 32 to 35 in Appendices A.

The data in Table 8 shows, the behavior of the local fish industry between 2011 and 2018, evidenced by the volume traded, number of vessels and amount earned.

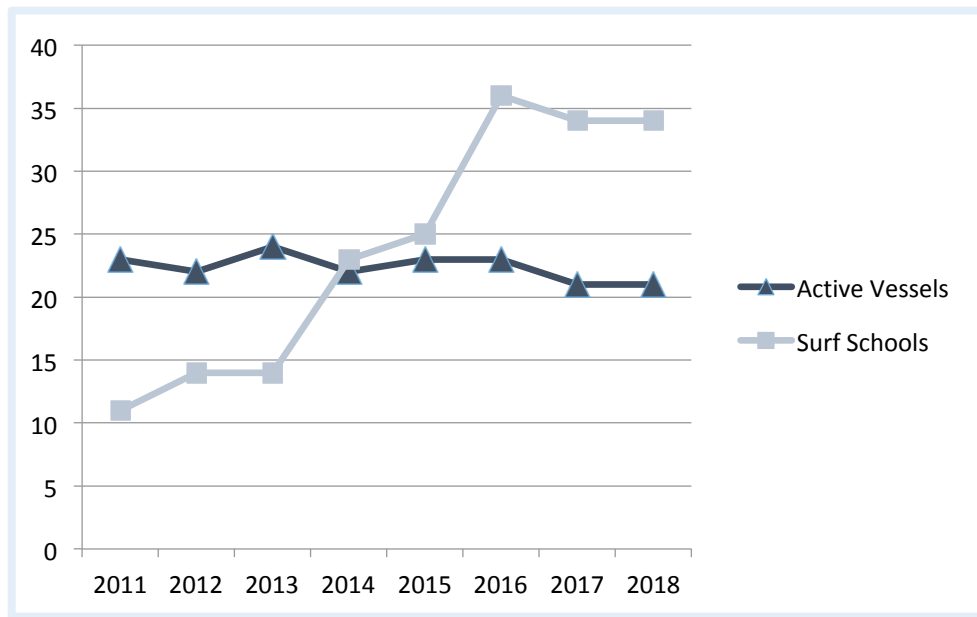
The surfing industry in Ericeira did not have as much of an effect on the fishing industry confirming that both industries are developing in a healthy coexistence. The decline in the quantity of fish sold between 2011 and 2018 was offset by higher prices. In particular, the industry generated 493,111 Euros in 2018, compared to 473,709 Euros in 2011. Therefore, the decline in volume did not impact the fishing industry significantly.

Table 8: Fishing industry in Ericeira

Fishing Industry in Ericeira				
Year	Volume (kg)	Amount (€)	Average Price per Kg (€/kg)	Qt of Vessels
2011	80453.10	476,709.48 €	5.94 €	26
2018	76799.80	493,110.45 €	6.42 €	20

Data in Table 9 shows that the percentage decrease in vessels does not correlate with the increase in surf schools.

Table 8: Surf schools and vessels between 2011 and 2018



As of 2011, the Municipality felt the need to create a business incubator structure to support the interest of the trade to be established in Ericeira. The Ericeira Business Factory was founded in 2015 and today has 31 active and operating companies. Its goal is the growth of business related to the sea, such as the surf industry, water sports, fishing and all other maritime activities aimed at the development of the local natural and cultural resources.

### **1.5.5. ERICEIRA SURF SCHOOLS**

Mafra Municipality released the information that 45 licensed surf schools are operating in Ericeira in 2019 (Azul Ericeira Mag); in 2011 there were 11 operating surf schools. The following observations were made from the investigation of surf schools in Ericeira in 2018/2019.

Vans, buses and cars were used to transport the tourists, and 81 percent of the surfers relied on beach parking. The highest number of coaches were allocated during the peak season, compared to the offseason. In contrast to the standard tourism trends, the number of surf students was highest during the offseason,

The highest cost per lesson varied between 32 and 215 Euros, depending on the lesson packages and the nature of the training (group or individual lessons) and most of the surf learners were tourists. In addition, most of the surf tourists originated from Germany and the UK; the pattern is consistent with earlier OECD data on the origin of EU tourists.

### **1.5.6. PERCEPTION OF SURF TOURISM IN ERICEIRA**

Two studies have been conducted; one for the perception of the local residents related to surf tourism and another via social networks, to evaluate the perception of the usual bathing season tourists. The exponential increase of tourism in the country and particularly in Ericeira, has put pressure on the urban infrastructure and population, resulting in profound changes in the life of the village. Selected parishes in Ericeira are more appealing to tourism than others. Therefore, the results should be considered at the municipal level, but with a more specific analysis of some of the parishes, more exposed to the touristic phenomenon. The study was aimed at determining the perception the residents have of the tourism phenomenon, as well as the prospects for the future. It aimed to gain insights into the opinion of the residents regarding Ericeira, and to determine how tourism has positively or negatively affected the lives of the residents. In general, it can be concluded that tourism is one of the most economically relevant activities in Ericeira and that this is also the perception of the residents, who have a generally very positive opinion of this segment of the economy and its contribution to their well-being and quality of life. The outcomes in graph 35 in Appendices A suggest that 80 percent of the frequent tourists had positive perceptions of the growth of surfing in Ericeira and believe that the



village lifestyle and tourism have succeeded in maintaining a healthy cohabitation with the surf industry.

## **1.6. RESTATEMENT OF THE INVESTIGATION**

The main issue of interest in this research was the impact of surfing on tourism in Portugal based on a case study of Ericeira (interviews with local and foreign surfers in Ericeira). The interviews with surfers and literature review suggest that the ocean has a central role to the economy of Portugal, especially given the current application for the expansion of the exclusive economic zone, development of the MSP to guide the sustainable exploitation of marine resources.

The ideal weather conditions (high wind conditions between October and May) in coastal environments had facilitated the development of surfing as a sport and the high ranking of Ericeira as one of the 11 global surfing reserves and the only reserve in Europe. The growth of surfing as a sport was also reinforced by the efforts initiated by local stakeholders in the surf tourism value chain. A comparison of this research and previous research outcomes affirms that the data was consistent with the body of knowledge about surfing in Ericeira. However, some challenges still abound. One of the primary challenges is the absence of a robust framework for the advancement of surfing. The results of this research may possibly be considered a provision to support local development policies, to enhance change patterns of behavior by both public and private sectors and promote a robust economic, cultural and legal framework in the surf industry in Portugal.

## **2. PEDAGOGICAL NOTE**

### **2.1. AUDIENCE**

The case study research targets the following audience: stakeholders in Ericeira's surf tourism sector, tourism service providers, undergraduate students in Sport and in Tourism, researchers and the local governmental entities. The educational objectives for the research are outlined below.

### **2.2. LEARNING GOALS**

The main educational goals were:

To undertake an analytic and descriptive evaluation of surfing in the Ericeira Municipality

To investigate surf tourism and its contribution to the economy

To evaluate the surfer profiles in Ericeira and Portugal in general

To review the current status of sports tourism and sports events

To determine the experiences of local and foreign surfers in Ericeira through interviews

To examine the characteristics of businesses in Ericeira through interviews

### **2.3. LITERATURE REVIEW**

The literature review describes surf tourism, National Tourism Strategy 2027 and the promotional campaigns undertaken by Turismo de Portugal. The literature appraisal provided new insights concerning the history of surfing and ocean sports in Ericeira and the effectiveness of promotional campaigns initiated by Turismo de Portugal such as Put Portugal on the Map.

#### **2.3.1. RELATIONSHIP BETWEEN SURFING AND TOURISM**

Globally, tourism is one of the three most important industries (Bojanic & Lo, 2016) as well as crucial for their development. Authors like Chen and Tsai (2007) believe that attracting new visitors to a country will increase overall yield, employment and capital of the local population. Surfing, as a sport, is also considered a valuable tool for both tourist and economic growth. Whilst surfers look at surfing as a life-style, always determined to find a perfect wave, tourism experts view surfing as a tourist/economic activity. This perception is important to

explain the surfing tourism, as according to Buckley, 2002, the determination to find a perfect wave and the act of traveling are connected. Thus, with this view, surf tourists are surfers before being tourists.

As for Dolnicar and Flucker (2003), surf tourism is defined as one that involves people traveling to domestic locations for no more than 12 months, using surfing as the main reason to choose to travel to that location. This author also refers that surf tourism includes not only the surfers but also the surfing spectators or non-surfers partners. The surfing industry has been growing, as well as the number of those who travel to find a perfect wave. Although the calculation of the number of surfers in the world is difficult and not precise, a study made by EuroSIMA in 2018 ("EuroSIMA - Association Européenne des Industriels des Actions Sports", 2018) indicates that there are around 23 million surfers in the world. These numbers show the dimension of the number of surfers in the world, representing plenty of opportunities for the surf tourism to grow.

Another relevant fact is the recognition of surfing as a sport. In the last decade, surfing was revolutionized and it got to a level of an impressive professionalism, promoting it to a much bigger media coverage, which culminated in the approval of surfing as an Olympic sport for Tokyo games in 2020. "Surfing is truly a global sport, more popular and more widely practiced than many current Olympic sports. Surfing is pursued in every corner of the world, in more than a hundred countries. There are now over 35 million surfers worldwide!" wrote Fernando Aguerre, president of the International Surfing Association (ISA) ("Olympic Surfing - International Surfing Association", 2018). "Surfers are a strong and positive influence on young people around the world. They are a very relevant part of our youth culture and serve as inspirational figures, naturally representing Olympic values".

### **2.3.2. SURF TOURISM**

According to a study by Dolnicar and Flucker (2003), it was concluded that having good waves is not the only criteria considered by surf tourists. They also look for other factors, such as the absence of crowds, personal safety, environment quality, healthcare concerns, food quality and the seasons. There are other factors that influence the choice of the location, such as local culture, cost of living and the existence of secret surf spots. For all these reasons, Portugal has great potential to be one of the surf tourism leaders in the world.

Although the surf industry and its economy have been growing in Portugal, its full potential has not been totally exploited. The Portuguese coast has a unique potential for surfing, due to the local mild and sunny weather, the wind conditions and the perfect age and energy of the wave climatology. According to Bicudo and Horta (2009), 10 Kilometers of coast with good quality waves can represent annual revenue of 100 million Euros, assuming that each tourist stays one week in the area and spends one thousand Euros. For this author, if the number of weekly visitor surfers were to equal the number of national surfers, this would account for 3 million new tourists a year.

Increase in the number of accommodations, restaurants near the beach, surf schools and surf events, demonstrate how the Portuguese surf industry and surf tourism are growing substantially. In previous years, the number of accommodations in favorable surfing areas has been increasing, especially in Ericeira, Peniche and Nazaré. Moreover, the new concept of ‘surf camps’, offer not only a room to sleep in, but they also offer packages, which include airport pick-ups, food, surfing activities, visits to surfing spots and sometimes even trips to cultural/historical places.

Within a two-hour period after any physical activity, there is a natural need to restore the body with energy, which consequently affects the growth of these restaurants. Most of these are now open not only monthly (i.e. during summer periods), but annually. Altogether, the increase in the number of surfers has a direct effect upon the need to increase the number of restaurants and beach bars guaranteeing the economic growth of locals, by maintaining the local population of these small villages and ensuring employment all year round.

The emergence of surf schools contributes significantly to the proliferation of the sport (Dolnicar and Flucker, 2003). These schools allow people to try surfing in a safe environment, without having to invest in equipment. A class costs, on average, around 20 to 30 Euros and lasts 1.5 to 2 hours. Also, the number of surf schools in Portugal has been increasing exponentially, and according to Portuguese Surf Federation, there were 299 surf schools in 2018. Each school gives, on average, two group classes per day and each group has a minimum of 6 persons and a maximum of 12. These numbers translate into a turnover of 33 to 65 million Euros a year, for the surf schools alone.

Surf events, such as tournaments or competitions, also aid economic growth; in short and long-term periods, when considering the impact of the destination in the international media. In

Portugal, there are a few events that give visibility and economic return to local businesses. The observations made by Salsinha (2019) are consistent with Drughi (2019), who noted that the Rip Curl Pro Portugal attracted international tourists to the Supertubos – the world-famous tourism event hosted in Peniche, Portugal. The main activities include competition among pro surfers. Similar events are also held in Nazaré, where the world's top surfers compete to set new world records set by international surfers such as Rodrigo Koxa and Garrett McNamara in Nazaré (Drughi, 2019). Such events have helped to place Portugal on the global surf map. Therefore, tourism service providers in Portugal should create products that would attract this tourism segment

According to Rebelo (2010), surf events project a region's tourism, especially if it is an international event. In 2018, 'Turismo de Portugal' will invest 1 million Euros in surf events, according to Luís Araújo, in an interview for *Expresso* ("*Turismo de Portugal investe €1 milhão em 2018 em provas de surf*", 2018). This investment includes four events from the World Surf League (WSL): Rip Curl Pro Portugal in Peniche, Big Wave Nazaré Challenge in Nazaré, QS10000 in Ericeira and the WSL3000 PRO in Santa Cruz.

Rip Curl Pro Portugal, the championship tour stage in Peniche, is the event which offers greater visibility and ensures the highest economic return. The first one was held in 2009 and it immediately transformed (for the best) tourism in that region. According to Francisco Spínola, Rip Curl's Marketing Director at the time, in an interview for Surf Portugal (Gonçalves, 2018), the average return from the Rip Curl Pro Portugal in 2014 was more than 28 million Euros, with a 100% occupancy rate in accommodation in Peniche. A study by Jorge, Mendes, Eurico and Leandro (2014), demonstrates the impact of the Rip Curl Pro Portugal on the local and national economy. According to this study, there were 135 000 visitors, of which 39 825 were tourists and 72 360 Portuguese from all over the country. It was estimated that each tourist spent, on average, 117, 47 € per day at the event, with locals spending 2,853€ on six items: transportation, accommodation, food, leisure, shopping and others. This study also found that the total expense during the event in 2013 was 7,158,521 Euros, versus 7,089,934 Euros in 2012.

These results have been proving that the economic impact is indeed relevant. In October 2017, a study revealed that the big waves of Nazaré resulted in 10.4 million Euros in expenditure in Nazaré ("*Ondas da Nazaré geram impacto económico superior a 10 milhões*", 2018). Another study ("*Impacto das ondas de Peniche é superior a 10 milhões de Euros*", 2018) on the social-

economic impact of the Rip Curl Pro Portugal in Supertubos, Peniche, reported that this event generated more than 10 million Euros in the Portuguese economy and that more than 100 thousand people visited Peniche during the event. It is also known that the first time the that Nazaré Challenge was held, in January 2017 in Praia do Norte, it resulted in 7 million Euros in communication and promotion of Portugal and the region ("7 milhões de Euros de retorno com Big Wave Tour na Nazaré", 2018).

Although in a smaller scale, the Portugal Surfing Cup 2018, held in Ericeira; Foz do Lizandro, ensured an estimated revenue of € 420.000 to the local economy (Azul Ericeira Mag). Surf tourism is a growing tourism segment in Portugal, the EU, and worldwide. The sport has three components, namely kite surfing, windsurfing, and wave surfing. As of 2019, there were 23 million surfers globally; other studies suggest that the number of surfers is between 13 and 35 million. A breakdown of the number of surfers per continent indicated that America and Oceania had the highest population of surfers, at 13.5 and 6.5 million respectively. The Asian continent had the third highest population of surfers, at 5 million (SurferToday, 2019). Africa and Europe had the least number of surfers, at 4.5 million each. In North and South America, the US has the largest population of surfers, at 2.8 million. Australia and the UK are ranked at position two and three (1.7 million and 500,000 surfers) respectively.

We could hypothesises that attracting more Portuguese into surfing can be achieved through the adoption of the Surf Around Portugal action plan (Academic Case Study by Baeta, 2015). The low uptake of surfing as a recreational or competitive sport in Portugal could be because surfing is perceived as a masculine sport; 81 percent of the surfers are male (SurferToday, 2019). Therefore, ISA and other stakeholders should address gender parity in the sector. A first step in this matter has already been taken: The World Surf League (WSL) announced the prize money equality commitment for 2019.

Another unique aspect of surfing is that at least six out of every ten surfers are aged above 25 years. The demographic profile of the surfers indicates that the global surfers have higher disposable incomes because there is a direct and positive link between mean disposable household incomes and ages up to 54 years in the US (Statista, 2019a). A similar observation was made in Portugal (Rodrigues & Andrade, 2014). The disposable income of the surfers is a critical predictor of tourist spending, tourism revenue, receipts and contribution to the national GDP. The statistics illustrate that the US is the leader in surfing and surf tourism, as shown in

Table 10, but Australia detains the better percentage of surfers towards the total existing population, followed by Portugal.

Table 9: A breakdown of the number of surfers per country versus existing population

Country	Population of surfers	Total Population	Surfers %
USA	2.800.000,00	326.474.013,00	0,86%
Australia	1.700.000,00	24.641.662,00	6,90%
United Kingdom	500.000,00	65.511.098,00	0,76%
France	450.000,00	64.938.716,00	0,69%
Spain	300.000,00	48.466.928,00	0,62%
Portugal	200.000,00	10.264.797,00	1,95%
Canada	2.000,00	36.626.083,00	0,01%

Sources (SurferToday, 2019) ( Population Pyramid 2017)

In 2019, the surfing sector recorded about \$22 billion in revenue from the sale of surf clothing, footwear, wetsuits, stake boards, surf gear, and surfboards. However, about 30 percent (\$8 billion) of the revenue was generated in the US (SurferToday, 2019). The global revenue values reported by Surf Holidays (2019) are lower than the revenue projected by Ponting and O'Brien, who noted that the revenues could be as high as \$130 billion (Ponting & O'Brien, 2014).

The population of surfers is expected to reach 50 million by the year 2020; this is according to the estimates provided by the International Surfing Association (2014). To note that the number of surfers could be higher because the ISA estimates are limited to 100 countries (International Surfing Association, 2014). Other surveys estimate that the global population of surfers had already surpassed 60 million in 2018 (LipChain, 2018); it is of note that there are no accurate statistics. The values are based on estimates because it would be time and resource-intensive to conduct a census in each of the 162 countries where surfing is practiced (LipChain, 2018).

A recent report by the CBI Ministry of Foreign Affairs confirmed that surfing is most prevalent in Western European countries. As previously noted, the region has ideal surfing conditions, such as four to eight-foot waves (CBI Ministry of Foreign Affairs., 2019). In addition to the long waves, Portugal has the longest wave swells, reefs, beach breaks, and the best climate for surfing in Western Europe (Gartside, 2016). The long coastline is also appealing to surf tourists. The growth of surfing is contingent on the number of surfers and surf tourists.

Surf tourism in Europe is also largely impacted by climate and weather patterns (tides, temperature, water levels, and climate (Salsinha, 2019). The observations made by Salsinha concerning the surfing conditions are consistent with the International Surfing Association (2014) and the CBI Ministry of Foreign Affairs. (2019) and Gartside (2016). A survey conducted by the University of Wollongong noted that a majority of European surfers were attracted to areas with point reefs (46 percent) and challenging tubular waves (40 percent). Beach breaks, and strong tubular waves were the least attractive (Salsinha, 2019). As expected, the tourists were less attracted to accessible and crowded beaches.

The absence of crowds in surfing destinations is a fundamental requirement because adequate space is needed for surfing maneuvers. Additionally, the absence of crowds is necessary for security and appeal – violence-related incidents have been reported in crowded beaches. The



lack of security has been proven to diminish the attractiveness of the tourism destination and the beach. Apart from insecurity, crowding of the beaches and surf destinations pose a risk to the environment in terms of pollution (Salsinha, 2019). Municipalities in Portugal should maintain the environmental quality of the beaches and surf areas as they are essential requirements for surf tourists. The recommendation is also underscored by the fact that Europe (the Netherlands, Germany, and the UK) is the leading source of tourists. Therefore, it is necessary to review the behavioral attributes of surf tourists in order to predict future demand

### **2.3.3. THE NATIONAL TOURISM STRATEGY (NTS) 2027**

The primary goal of the NTS 2027 is to increase the competitiveness of tourism businesses, safeguard cultural and national resources, and accredit tourism products and destinations. In particular, enhancing the competitiveness of businesses undertaking tourism-related activities through better access to finance, innovation, and the application of entrepreneurship skills (OECD, 2017). The National Strategy for 2027, visualized in Figure 23, illustrates that five strategic axes define the strategy, namely highlight Portugal, generate networks and connectivity, promote knowledge, boost the economy and value the territory (Araújo, 2017). The promotion of knowledge in the current context encompasses the dissemination of tourism data, facilitating continuous learning, training of human resources and the development of smart destination strategies. The government also plans to boost the economy by reducing bureaucracies, simplifying business legislation, and creating a favorable environment for competition and innovation. The first significant reforms in business legislation were made in 2013, leading to fewer bureaucracies in market access (OECD, 2017), such as the elimination of non-value adding requirements, processes, taxes, licenses, catalyzed novelty and innovative ideas. Government bureaucracies can be considered an impediment to innovation and competition within the tourism value chain.

The changes in the legal framework also contributed to the establishment of multiple recreational service providers, new and novel tourism products, construction of new tourism facilities and creative solutions to the challenges facing the sector. The positive effect of the new legislation is evident from the number of new businesses established over time; between 2009 and 2014, the registration of new tourism businesses increased fourfold from 520 to 2,100 (OECD, 2017). The increased competition among the service providers resulted in better quality,

innovation, and co-competition in Portugal's tourism industry. The highlight of Portugal's strategic axis involves positioning the country as an ideal tourism destination for investment and study.

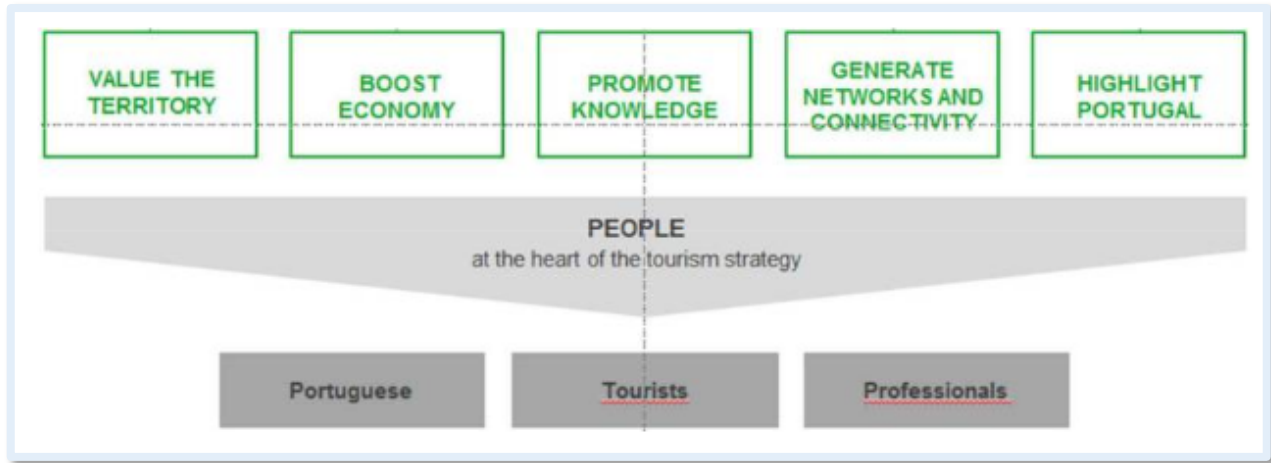


Figure 23: Strategic Axis for the national tourism strategy for 2027 (Araújo, 2017)

The digitization of the tourism economy is another issue of primary interest to the stakeholders in the tourism value chain. According to OECD's recent market report, competitiveness should include placing greater emphasis on Portugal's unique tourism attributes, adaptation to the changing global tourism landscape and alignment of human resource skills with the global market requirements (OECD, 2017). In brief, the main priorities under the National Tourism Strategy 2027 are renewed focus on the domestic market, reinforcement of the promotion of international tourism, integration of mobile and online channels in tourism promotion (digital strategies) and emphasis on tourism events that offer authentic experiences to tourists. The advancement of collaborative efforts within the sector is a secondary priority under the NTS.

The implementation of the priority themes under the 10-year vision for tourism in Portugal would help to increase tourism revenues and overnight stays by 26,000 million Euros and 80 million respectively (One Planet Network, 2019b; Turismo De Portugal, 2016). A point of interest is that NTS is the first strategy to take into consideration overnight stays (Araújo, 2017). The projected revenues from increased tourism arrivals would have a domino effect on the economy and other sectors, leading to the development of networks and connectivity. Currently, the strategy has led to the development of a framework for promoting tourism, through a

participatory process, that involves all stakeholders in the industry. The strategy also encompasses short-term strategic plans that are aligned with EU's Community Framework Support for 2021-2027 (Turismo De Portugal, 2016). The NTS has resulted in a tangible improvement in domestic and international overnight stays, as shown in Figure 24. Domestic overnight stays rose from 14.9 to 19.6 million between 2014 and 2018 (Turismo De Portugal, 2018). However, the domestic overnight stays were outperformed by the international overnight stays, which recorded the most significant growth (13.5 million) during the same period. The "international overnight stays represented at least 70 percent of the global demand" (Turismo De Portugal, 2018, p. 7). The tourism sector recorded 66.1 million overnight stays (a 1.7 percent improvement on the previous year). Even though the growth of the domestic segment could be considered marginal - Turismo De Portugal (2018), one could argue that the sector recorded the highest relative growth.

The robust growth in the overnight stays was also sustained in other months, during the off-peak season. According to Turismo de Portugal (2018), 97 percent of the growth in overnight stays in both sectors was noted in the off-peak season. In addition, the surf season in Ericeira is during autumn and winter, when the North Atlantic weather sends substantial surf winds towards Europe's west coast, which is a plus for a continuous occupancy in Ericeira during the off-peak season. The growth of the overnight stays in the off-peak season could be attributed to the diversification of tourism products and services, and in this case surf tourism could be a motor for the industry and an all year round activity (Palrão & Filipe, 2017).

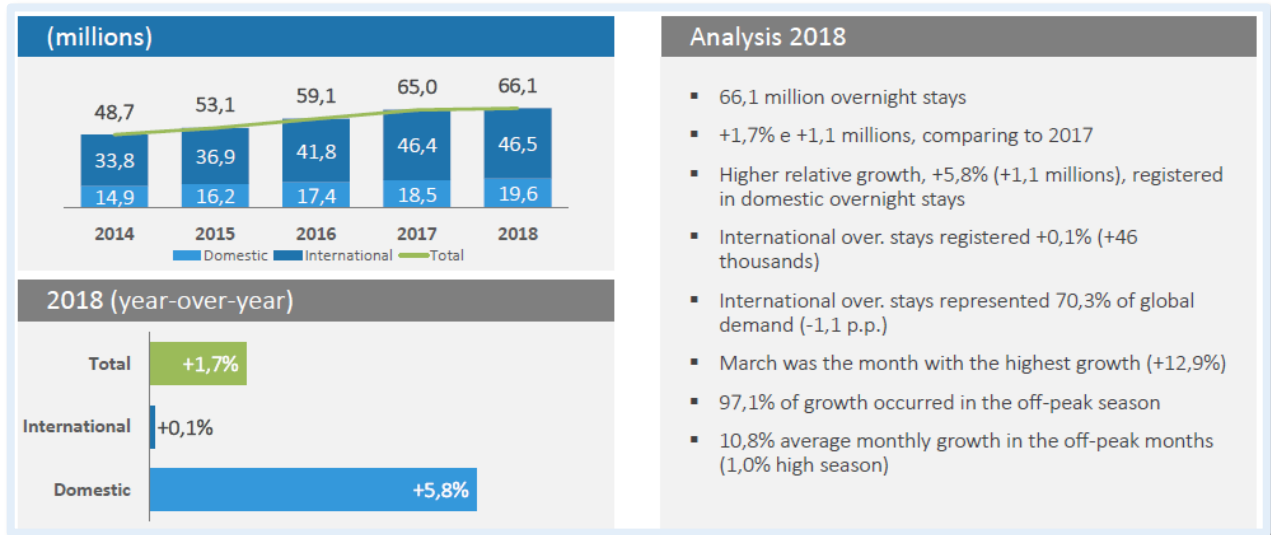


Figure 24: Overnight stays and a brief analysis of the progress made in the sector (Turismo De Portugal, 2018)

The realization of the strategic vision is dependent on the government’s ability to address ten critical issues, namely people, sustainability, innovation through entrepreneurship, growth in value, cohesion, simplification of tourism-related legislation, investment (through financial guarantees), demand accessibility and tourism every year (Araújo, 2017; Turismo De Portugal, 2016); these issues are highlighted in Figure 25.



Figure 25: The 10 challenges for a ten-year strategy (Turismo De Portugal, 2016)

Firstly, the country should possess sufficient human capital to support the strategy, by promoting education, employment, and investment in human resources. Additionally, the country has to address regional disparities, improve accessibility, promote cohesion, and adopt ingenious marketing strategies and packages better than the competition (Turismo De Portugal, 2016). The success of the National Tourism Strategy 2027 is the on collaboration along the tourism value chain; the cooperation should also encompass communication and engagement between the private and public sectors (Araújo, 2017). Communication is expected to facilitate engagement, mobilization of resources, and receptivity among the Portuguese public. Portugal is investing in tourism promotional campaigns, such as "Put Portugal on the Map," aimed at supporting the growth of domestic tourism and complementing international tourist arrivals during the low season.

The focus on domestic tourism is based on the ratio of domestic tourists versus international tourists, which was 69 to 31 percent in 2018 (World Travel and Tourism Council, 2019a). The observations made by the WTTC are consistent with the OECD country profile for Portugal. In particular, a comparison of the number of overnight stays made by domestic and inbound tourists between 2010 and 2014, indicated that the latter segment generated more revenues than the former (OECD, 2017). For example, in 2014, 9,277,000 inbound tourists made overnight stays in Portugal vis-à-vis 6,780,000 domestic tourists who made overnight stays in different tourist destinations (OECD, 2017). In brief, there were 2.5 million more inbound tourists than domestic tourists during the period under review; the country's population and the average income should be taken into consideration. The observations made by OECD are in agreement with Turismo De Portugal (2018), which reported a 5.8% growth in the domestic segment, as shown in Figure 26.

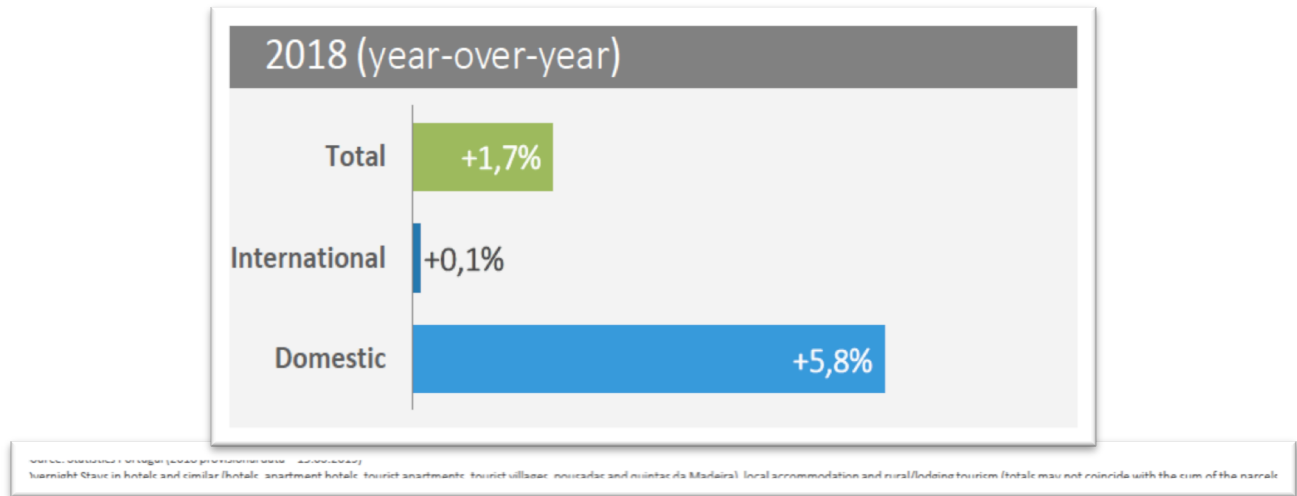


Figure 26: Domestic and international tourist arrivals in 2018 (Turismo De Portugal, 2018)

The growth of the domestic tourism market would help protect the tourism micro economy from global volatilities such as the Brexit and tensions within the financial markets (European Travel Commission, 2019). The complementary effect would also provide tourism service providers with a sustainable source of revenue and consequently, diminish the effect of seasonality in tourism.

#### 2.3.4. THE PROMOTIONAL CAMPAIGNS OF TURISMO DE PORTUGAL

The Government of Portugal initiated various tourism promotions and started an aggressive campaign for promoting the Sea and Surf.

Put Portugal on the Map is one of the new promotional campaigns aimed at increasing domestic tourism, especially during the low tourism season (Opção Turismo, 2016). The focus on local/domestic tourism is validated by its potential. Presently, domestic tourists represent about 40.6 percent of the total tourist population, and they accounted for 27.3 percent of the overnight stays (Opção Turismo, 2016). The values illustrated that the potential of the sector had not been fully exploited.

The campaign also looks to encourage local Portuguese tourists to develop short films (5 to 20 minutes), highlighting their most memorable tourism experiences. The videos help create the first video map of Portugal, that can be accessed through the digital platform or smartphone application Glymt (Opção Turismo, 2016). Once all videos have been uploaded, the top four

hundred videos will be employed to showcase tourism products in Portugal (Araújo, 2017; Turismo De Portugal, 2016); it is intended to stimulate tourism content production among the youth living in areas adjacent to the ocean. The first tourism video challenge was limited to the sea.

The stakeholders funding the campaign hypothesize that user-generated content would help influence potential tourists and ultimately lead to a purchase (Opção Turismo, 2016). In addition, campaign intends to show the diversity of the nation through broader coverage; it should be noted that diversity was also appreciated as a critical strategic asset in the National Tourism Strategy for 2027 (Araújo, 2017; Turismo De Portugal, 2016). Therefore, the different national tourism campaigns are founded on a similar strategic axis.

Since 2013, greater emphasis has been placed on digital marketing in place of print publications. The transition to digital publications has proven more effective compared to paper-based promotional campaigns. The success of the digital campaigns has also been supported by the World Surf League, which has hosted multiple events in the country since 2009, including the MEO Rip Curl Pro Portugal (World Surf League, 2018).

The recognition of Nazaré, with the largest wave in the world, of Peniche, with the Supertubos beach, where one of the World Tour stages takes place, and the classification of Ericeira as the only surf reserve in Europe (Ericeira WSR, 2019), have enabled Turismo de Portugal to position the country as a premium surf destination and certainly the best in Europe. The surf events also underscore the role of the Atlantic Ocean in the economy, cruise tourism, nautical sports, whale watching, short fishing, leisure and the blue growth strategy. The ocean is also key to the advancement of ocean sports in the off-peak season. Luis Araujo, President of Turismo de Portugal, noted in 2016 that the waves and the coast would facilitate a strategic shift in the development of surfing in Portugal, especially during the low season.

The diversity of tourism products in Portugal was also featured in the 2014 promotional videos - Riding the Portuguese Waves by Garrett McNamara. Other campaigns were initiated in 2016, including the Portuguese Waves and “All for All”, defining aspects of Turismo de Portugal (Portuguese Waves, 2016). These promotions increased the visibility of Portugal as an ideal surf destination, given that the themes had also been adopted by technology companies such as Samsung, with its promotional campaign titled “We are Greater than I” (Rausch, 2015). The video gained global publicity after it was awarded the Cannes Lions 2016 prize.

All these actions were augmented by a billboard marketing campaign by The Portuguese National Tourism Authority, in Times Square, New York in 2018 (SurferToday, 2018). The advertisement featured the surf waves of Nazaré and a promotional message. The tourism arrival patterns illustrate that the aggressive tourism campaigns were successful - tourism arrivals have increased by at least 10 percent. A significant increase was reported among US tourists. From an abstract perspective, the US marketing campaign seems to suggest that Portugal could be seeking to reduce its reliance on the EU for tourists and diversify its tourism mix.

The world –class waves of Nazaré promotion culminated a 10-year plan to use surfing as an anchor in stimulating the national tourism. Nonetheless, the decision was not directly related to surfing as a tourism product, but its ability to enhance the visibility of Portugal as a tourism destination. In the recent past, surfing has helped to relate Portugal with certain lifestyle that points to a harmonious relationship with nature, respect for people and their differences and an ability to be bold in the face of adversity. Values that adequately describe Portuguese experiences as credible and authentic. On the other hand, surfing helps to qualify Portugal’s main touristic product - the sun and sea - and redefines the country’s relationship with the sea.

Lida Monteiro, marketing manager of Tourism the Portugal, noted that the new campaign, “Portugal the Summer” (five video campaign) has led to the development of a new communication approach, by combining music and dance with the country’s touristic activities, appealing to the senses and validating the destination choice. In brief, creativity is the main goal, anticipating trends and tendencies by developing the knowledge.

Under 1 on Appendices B some links of promotional campaigns made by Turismo de Portugal

### **3. METHODOLOGY**

The case study research involved a descriptive literature review (of surfing, surf tourism, and tourism strategy) and interviews with surfers and local business people at Ericeira.

A basic methodology was adopted by exposing facts and contents collected during the investigation from official Portuguese sources and using cross-checking material from international organizations, which were relevant to the theme of this study. It was decided that a hybrid approach should be taken, correlating a positive with an interpretive judgement. The



interpretative conclusion was based on the information treated in order to establish an action plan in the light of the conclusions and know-how acquired during the investigation.

Supported by empirical knowledge, the specialized, expert literature and sports press coverage of governmental, official programs were the basis and working backbone of this study.

The systematic search, allowed a precise expression of the information needed; the first step to conduct this analysis was an extensive research of the various areas contributing to the growth of the Economy of the Sea and of the Portuguese tourism and surf industries; it was concluded that the approach needed to be supported by official governmental documents and strategies. This was completed by reviewing existing cases and contextual studies, elaborating on existing literature. The next phase was the definition of the documental corpus and starting on the *modus operandi* - how to treat the material that was being worked on and produced, supported by the research of archives, documentation centers, governmental sport and tourism entities, institutes and local municipalities. An investigation in this area is difficult to perform due to the limited data and information available.

A qualitative approach was adopted in data collection, and the main sources of information were; Turismo de Portugal, World Surf League, government reports such as the National Ocean Strategy 2013-2020 and the National Tourism Strategy 2027, *Save the Waves*, the *Journal of Mediterranean Geography*, Portuguese tourism websites, and peer-reviewed articles. In particular, the leading authors were Moreira (2019), Cardoso (2018) and Manuel dos Santos (2019). The three authors have undertaken extensive studies on Portugal as a tourism destination, expenditures, revenues, and investments in tourism.

Qualitative methods of data analysis (mainly content analysis and thematic analysis) were employed in place of statistical techniques in the data processing.

The field work, interviews, investigations and inquiries took place in the village of Ericeira and surrounding areas. Three surveys were prepared and each one focused on a specific group and developed on QuestionPro, a World Leader data collection platform.

Three different approaches were used; the first with Ericeira surfers (with 41 responders), both in Portuguese and English, the second with the local trade and industry (83 responders) and the third with frequent Ericeira summer tourists (176 responders). All surveys were preceded by an introduction, explaining the aim of this investigation.

Surfers were surveyed at Ericeira beaches and surf spots, through personal interview, using an iPhone smartphone as a data collection tool. Local traders and industry stakeholders were contacted via email. Others were interviewed in person in Ericeira. The e-mail included the introduction cover and invited the receivers to participate by accessing to direct link to the survey. The investigation for Ericeira frequent summer tourists was distributed via Facebook and Instagram. Additionally, the magazine Ericeira Mag, published in social networks a report on this survey, inviting readers to contribute and to participate through direct connection to the link. The data analysis was made via SPSS. The descriptive statistics were calculated as counts and percentages for all variables. For the quantitative variables the mean and standard-deviation were also computed. This analysis was done for the three surveys conducted.

#### **4. ANALYTICAL TOOLS**

A well-managed tourism policy is a priority for the large number of local and regional economies where tourism has increased in importance. Policies should be aimed at capitalizing on advantages and avoiding possible disruptions which occur as tourism develops. Local and regional strategic plans for the development of tourism should result in specific functioning or tactical actions. Using a thorough analysis tools, these strategies can be based on a reliable analysis of the internal potential and the environment of a destination.

##### **4.1. PORTUGAL PESTEL ANALYSIS**

When analyzing and monitoring macro-environmental factors that may have a significant impact on the performance of the subject of a study, a basis or tool often used is the PESTEL or PESTLE analysis, which is often used in conjunction with other tools, such as the SWOT analysis, in providing insight into a specific subject and the internal and external factors related to it. PESTEL stands for Political, Economic, Social, Technological, Environmental and Legal factors.

This PESTEL analysis reviews the political, economic, social, technological, environmental, and legal aspects in Portugal that could impact surfing and surf tourism.

##### **Political Analysis**

From a political dimension, Portugal is a stable multi-party democracy with a semi-presidential system. The country is governed through 18 administrative divisions (Portugal.com, 2019a). The Government is headed by the presidentially appointed Prime Minister resulting of the election's results and including one or more Deputy Prime Ministers, Ministers, Secretaries of State and Under-Secretaries of State. The Sea is governed by its own Ministry, Sports is under the umbrella of Sports and Youth Secretary of State and Tourism governance is under a Secretary of State belonging to the Economy Ministry responsibilities. The political establishment and government institutions have exhibited support for surfing and tourism-related events in general through the adoption of the National Tourism Strategy and other initiatives (Araújo, 2017). However, the government needs to invest more in destination tourism and tourism destination sustainability (Cardoso, 2018; Carneiro, Breda, & Cordeiro, 2016). Such an investment would help sustain the current tourist trends.

### **Economic Analysis**

According to OCDE 2019 Economic Survey of Portugal, the Portuguese economy continues to recover, with past structural reforms and more favorable global economic conditions contributing to the upswing. The economy has largely been sustained by strong export performance since 2010 as shown in Figure 27, but domestic demand is now also growing solidly. After receding in the five years following the crisis, employment has picked up and the unemployment rate has fallen.

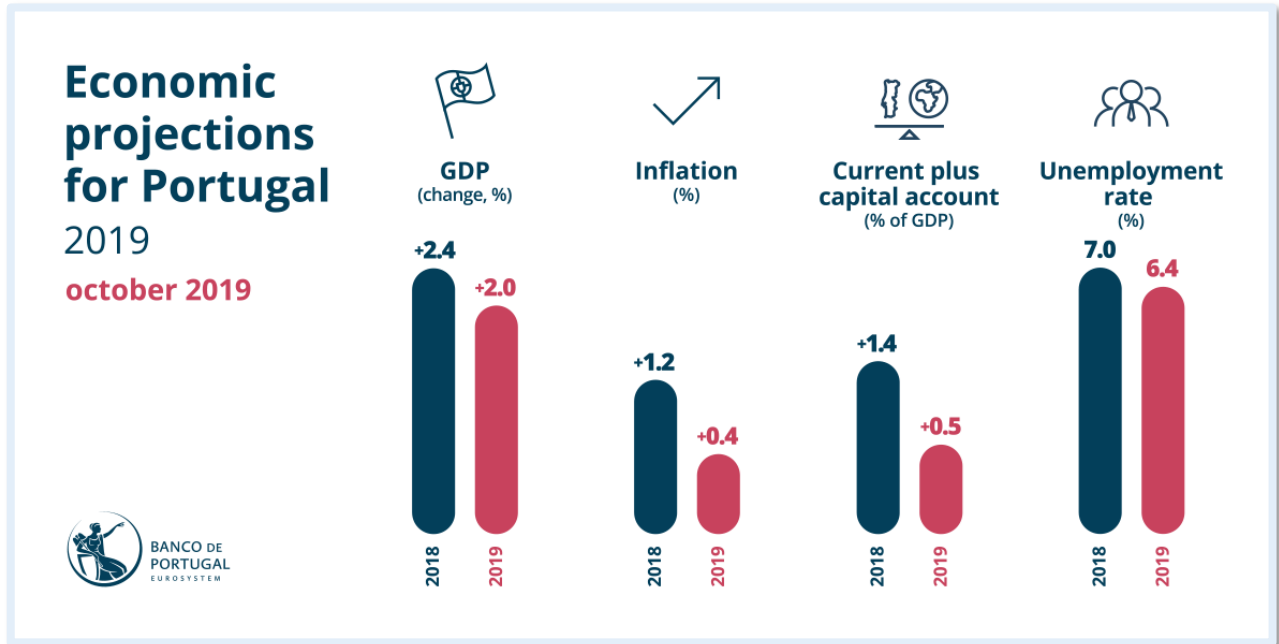


Figure 27: The Portugal's economic projections for 2019 (Banco de Portugal)

Portugal is an EU Member since 1986 and part of the European Monetary Union. The most important economy sectors in 2018 were wholesale and retail trade, transport, accommodation and food services (24.9%). Tourism and all travel-related revenues account for about 10 percent of the country's gross domestic product. The tourism sector is also a key source of employment and big component of exports of services (European Union). The signs of stability Portugal has been able to demonstrate have led businesses to change their assessment of its attractiveness, resulting in short-term investment plans in the country being amongst the highest in Europe. Renewed growth, an improving structural balance, and a consolidated banking sector resulted an improved market sentiment, as is evident from the declining cost of debt and the upgrade, to investment grade, of the Portuguese sovereign debt rating. (EY, Attractiveness-survey-portugal-2019).

### Social Analysis

Portugal's population was 10.2 million in 2018, out of which 6.1 million are employed in economically productive sectors (Portugal.com, 2019b; World Bank, 2018). The country has recorded a decline in population growth; the rate of the population at risk of poverty achieved 18.3% (Portugal.com, 2019b) and the unemployment rate is situated at 7% (Gurría, 2019; Portugal.com, 2019b)

## **Technological Analysis**

The country has made significant progress in technological development and innovation (Observatory of Economic Complexity, 2019); however figures show a very low performance; the expenditure on research and development is 1,3% of the GPD compared to 2,1% in EU at 28. Seventy nine percent of the Portuguese households have internet access but only 65% of the existing enterprises have a website.

In recent years, Portugal has improved its position related to the Information and Communications Technology development index.

The current economic and the start-up ecosystem in Portugal has allowed for substantial potential in the ICT industries, with the recent contribution of the Web Summit events in Portugal, having undoubtedly increased the Country's visibility in this sector.

Portugal has been the incubator for some high-tech innovations that changed the world we live in. The vibrant eco-system of ICT start-ups in Portugal contributed to Lisbon becoming, in 2016, the new home of the Web Summit, one of the world's most important technology conferences, held annually since 2009, having moved from Dublin to Lisbon in 2016. The conference is centered on internet technology and innovation and attendees range from Fortune 500 companies to smaller tech companies, including a mix of CEOs and founders of tech start-ups, as well as a range of people from across the global technology industry, related industries, political leaders, famous athletes, actors and musicians. The Web Summit has generated incalculable added-value to the Portuguese economy and enhanced the growth and diversification of ICT-related businesses in the country, enjoying a strong political commitment from the Portuguese government and the Presidency of the Republic.

In short, the trends surrounding the ICT ecosystem in Portugal have added to the trends set by the European Union, leading to the development and establishment of services in Portugal, all ICT-related in their most varied areas

## **Environmental Analysis**

Portugal has diverse weather and climatic conditions, ranging from warm coastal weather to cold winters (Weather Spark, 2019). The variations in weather patterns make the country an ideal destination for tourists. In addition, the European MSP Platform (2018) notes the country has an extensive coastline.

The significant progress made in the transition to a circular economy was confirmed by the EIR 2019 report. Portugal's National Action Plan for the Circular Economy (2017-2020) was approved. The National Strategy for Nature Conservation and Biodiversity was adapted in 2018, but the same report states that additional steps are required in order to achieve the adoption of measures needed in the protection and management of the Natura biogeographical regions. Marine conservation has seen some progress, particularly in the implementation of marine strategies aimed at achieving an improved environmental status for marine waters. Additional favorable environmental steps can be highlighted in the case of Portugal: the creation of the Single Platform for the Inspection and Monitoring of the areas of Agriculture, Sea and Environment, resulting in improved and more efficient public services and their relationship with citizens and business community; the E-GAR, a platform that tracks and provides information on waste shipments; the Single Environmental Permitting Platform, which simplifies, standardizes and links a number of environmental permits; and the Environmental Funding Program (Fundo Ambiental), an important tool for investment in the fields of climate change, circular economy and habitat appreciation.

## **Legal Analysis**

The Portuguese legal system is part of the civil law legal system. The core laws include the Constitution (1976, as amended), the Portuguese Civil Code (1966, as amended) and the Penal Code of Portugal (1982, as amended). Other pertinent laws are the Commercial Code (1888, as amended) and the Civil Procedure Code (1961, as amended).

The supreme national courts consist of the Supreme Court of Justice and the Constitutional Court. The Public Ministry, led by the Attorney General of the Republic, constitutes the independent body of public prosecutors.

The Parliament, Unicameral Assembly of the Republic, in Lisbon, is the main legislative body, although government also has limited legislative powers. (Portugal.com, 2019a)

## 4.2. ERICEIRA SWOT ANALYSIS

SWOT analysis is one of the most frequently used methods to build an overall development strategy (general) as well as functional strategies (fractional). This method is wide-ranging because it concerns internal factors and external factors. The combination of external and internal factors leads to four categories: Strengths: internal positive; weaknesses; internal negative; opportunities; external positive and threats; external negative

This section refers at first to the strategic diagnosis using a SWOT analysis in Figure 28, the acronym for strengths, weaknesses, opportunities and threats, as a tool used in management and planning, allowing for an assessment of the necessary environments and serving as the basis of the strategy for the further development of the existing surf management plan for Ericeira World Surf Reserve

S STRENGTHS	W WEAKNESSES	O OPPORTUNITIES	T THREATS
Secure destination, which contributes to its attractiveness	Lack of Management and Marketing solid international approaches	International awards given to Tourism in Portugal, contributing to its promotion and positioning in the global scene	Environment degradation
Short distance to Portugal's capital, Lisbon and to the International Airport	Insufficient promotion and international dissemination of the destination for off peak season occupancy	International recognition of the Destination Portugal as modern and secure	The lack of regulation and legislation in the development plans for the RMSE, the only one in Europe, is also seen as a threat in a territory with strong tourist pressure,
Good accessibility and close to highway network allowing an easy mobility within all country	Lack of a concerted communication strategy by the different players in SURF tourism sector	Transportation ( low cost airlines)	Massification strong tourist pressure, leading to an excessive load that can ultimately threaten environmental sustainability;
Temperate climate and wind conditions allowing surf practice throughout the year	Need of a structured approach to allow sustainable and organic growth	Media and social networks power for the contestant drawing attention to the destination and surfing tourism	The surplus of surf schools in this region.
Ericeira dedicated as World Surfing Reserve since 2011	Need to update the legislation, in order to reorganise the beaches, regulate the opening of surf schools and other recreational operations	Growing demand for memorable sport and tourism moments and experiences	Lack of supervision and excessive recreational operators on the beaches
Protected landscape area integrating the Natura 2000 Network	Lacking monitorization of sector indicators to guide the implementation of action plans;	Trend towards adopting healthy lifestyles with sustainability awareness	
Amazing natural conditions for the practice of surfing combined with the richness of the edified heritage completing the touristic offer	No existing long - term management plan for EWSR ( only short term biannual (2018/2019) framework		
Dynamics of tourism and surfing infrastructure; surf schools, shapers surf shops, accommodation in different types, restaurants & bars & beach bars, grocery shops and supermarkets; new intermodal parking to be operational in 2020	Seasonality		
Strong local community commitment to the sport of surf.			

Figure 28: Ericeira Swot Analysis

Under 1 on Appendices B some links for of Portugal and Ericeira

### 4.3. TOURIST SURFER & SURFER ANALYSES

The second section outlines the profile of the European surfer tourist profile based on a study by CBI Market Intelligence (CBI Product Factsheet: *Surf tourism from Europe*, November 2015) and the results of 2 surveys made by OBSURF, one in Ericeira and another in 9 national surf spots along the Portuguese Coast.

#### **Who is the European tourist surfer?**

The tourist surfer is about 30 years old, has higher education and high expenses when traveling. The average length of a surf trip is two weeks. Most surfers-tourists are men (93%). Most travel in groups with a companion.

The four main identifiable segments are:

##### ➤ **Leisure Surfers**

They like to combine surfing with other activities. They prefer less spacious accommodation, although they are sometimes housed in resorts. In addition to the destination's attractiveness for surfing, comfort, culture, the quality of meals and being able to visit other places of interest are important factors for this segment.

Surfer tourists in this segment may spend 40-50% of their time in non-surf related activities, depending on their individual preferences. Usually they are highly active people and when they are not surfing they like to try other water-based activities or other sports on land or in the air (e.g. biking or parasailing). This segment is very attractive to companies with surfing activities because of their interest in surfing lessons.

##### ➤ **Passionate surfers**

For this segment, surfing is the main reason for traveling. They often look for specific waves (e.g. in terms of height and currents). The more waves there are the better. Accommodation and cultural trips are not very relevant for this segment. Their basic needs include a clean room, good, simple food, a hot shower and friendly staff. Passionate surfers usually travel with their own equipment and require a safe place to store it. This segment does not like crowds.



➤ **Professional surfers**

Professional surfers compete in the world circuit and travel to the destinations where competitions are held. The existence of good infrastructures is of great importance to this segment. Although small in numbers, this is the leading segment, attracting other surfers and spectators to the same destinations with the inherent multiplication factor.

➤ **Families, couples and small groups**

About half of the surfer tourists travel with their partners, or with two or three friends. This segment constitutes the majority of the surf tourism market. Usually there is a surf enthusiast in the group and another who surfs occasionally, or not at all.

Quality is of particular importance to this segment. As surfers tourists in this segment are generally high income individuals, they are willing to spend more to ensure the quality of certain factors, such as flight connections, accommodation and activities.

**Who is the Ericeira Surfer?**

The survey took place in 2018/ 2019 in Ericeira with a sample of 855 surfers;

95,7% are Portuguese (in high season foreign surfers are 62.5% of the total) male (95.9%), aged between 15 and 24 years old (49,6%), Single (68.8%), 53,7% are high school graduated and 75,2% have a monthly income level up to 3500 euros, and with average of 11 years surf practice. Most are all year-round surfers, 2-3 times a week during the warm months and once a week in winter.

**Who is the Surfer in Portugal?**

The survey took place in 2017/2018 in 9 surf spots along the Portuguese Coast with a sample of 2503:

99% of Portuguese Surfers are male; 78, 6% are aged between 15 and 34 years old and 69,2% single, with compulsory scholarship ended ; 57,9% have an average monthly revenue between 1500€ and 3000 €; the majority with 98,4% practice surf all year round, when sea conditions allow it, with an average of 10 years surf practice; twice or 3 times a week in spring /summer and once a week in winter

90% are motivated by the love to the sea and 98,7% refer that surf contributes to a physical and mental wellbeing (41,3% as a relax method, 33,7% for the adrenaline feeling and 32,2% as relief of the daily stress), Spain is leader of the foreigner's surfers in Portugal with 26,3%

followed by Germany with 15,3%, France 13,1%, UK with 8,9% and Netherlands with 6,6%. The same study concludes that the number of Surfers in Portugal is between 120.000 and 250.000 but does not mention the number of surfers visiting surf schools; Portuguese surfers start as self-learners supported by friends. Only 11, 6% (mostly beginners) decide to have surf lessons; 88, 6% to learn it quicker, 87,6% for better knowledge of security rules and 68,4% for performance improvement. The estimated annual turnover of the Portuguese Surf School lies between € 8 million and € 12 million.

### Profile Overview

The data in Table 11 highlights the overview of the survey mentioned in this research; meaning the comparison between this survey and the ones made by OBSURF, as described in previous sections.

Table 10: Study survey and Obsurf survey

	<b>SUTDY SURVEY</b>	<b>OBSURF 2018/2019</b>	<b>OBSURF 2017/2018</b>
<b>Year</b>	2019	2108/2019	2017/2018
<b>Sample Size</b>	41	855	2503
<b>Location</b>	Ericeira	Ericeira	9 surf points in Portugal
<b>Gender male</b>	78%	96%	99%
<b>Portuguese Nationality</b>	61%	96%	-
<b>Age</b>	24.4% below 25y	50% with 15-24y	6% with 15-34y
<b>Education Level</b>	88% with a university degree	53% with high school graduation	Mainly mandatory scholarship
<b>Income</b>	50% in 10-20K range (annual)	75% with a month income up to 3500€	58% with a month income of 1500-3000€
<b>Trips for surfing</b>	13 trips per year	Practice surf 2-3 times a week in summer;	Practice surf 2-3 times a week in summer;
	50% spent 5 days per trip;	Practice surf once a week in winter;	Practice surf once a week in winter;
	Travel in group with friends;		
<b>Average Spent</b>	50-100€ for aprox.33% ;mainly in food and beverages	-	-
<b>Accommodation</b>	at friend's home	-	-

#### 4.4. THE IMPORTANCE OF SOCIAL MEDIA AND SURF APPS

Paddy Cosgrave, founder of the Web Summit reinforces the awareness of the importance of the social networks for the promotion of surfing. Instagram and Youtube can become very important tools to bring the products nearer to the global public. Technology takes part in our daily life. Fantastic and colossal issues, such as Nazaré giant waves, are constantly shared and this, raising the attention towards Portugal and the surfing, even if 99% of the viewers had or will never surf. This is the real power of the social networks.

The surfing community obtains information from the World Surf League (WSL), which organizes the surf events. The WSL portal had 42.9 million views (2015). The Facebook page had 5.7 million followers and the Instagram page had 2.2 million followers (2016)

WSL fans are the most engaged sports fans using social networks. Alternatively, the community obtains information from WannaSurf, <https://en.wannasurf.com/>. The portal publishes information on world surf spots, surf conditions surf schools, surf camps and accommodation and it has about 2.6 million views/month. Other common sites include magicseaweed, <http://magicseaweed.com/>, a portal with real-time information on conditions for surfing, surf spots and weather across three thousand beaches in 180 countries. The site has 1.5 million views/month. Surfline, [www.surfline.com](http://www.surfline.com), a portal with real-time information on conditions for surfing and weather for the main surf spots in the world. Windguru, [www.windguru.cz](http://www.windguru.cz), one of the most useful sites for surfing beginners or any other marine sport. It has information on wind, waves, air temperature and cloud cover, with circa 35 million views/month. Facebook, Instagram, MySpace and Twitter are the social networks most used by surfers. However, there are surf specific networks, such as:

1. The Inertia, [www.theinertia.com](http://www.theinertia.com)
2. Ulupono Surf, [www.uluponosurf.com](http://www.uluponosurf.com)

The exponential number of applications that exist have reached the world of surfing. Most apps are practical, some function as diaries and have weather and wave forecasts or tide tables.

The following apps stand out from the rest:

1. World Surf League app (iOS, Android) with live broadcasts, event alerts, news updates, athlete information and rankings. It allows you to follow the WSL World Championship in real-time.
2. Windy app (iOS, Android) with real-time animated maps, wind and wave information, as well as tide and chart data.
3. Surfline app (iOS, Android) lets you view forecasts and surf reports for hundreds of spots around the world. It allows you to see the waves in real-time, through cameras installed on hundreds of beaches around the world.
4. Magic Seaweed app (iOS, Android) offers detailed ocean analysis, including waves, winds and swell, live report broadcasts by local observers and live cameras on the beaches.
5. iSurfer app (iOS), with features that are useful for beginners and professionals, from choosing a board and wetsuit to viewing tutorial videos and saving information and images about the places where the user has surfed, and the boards used.
6. GoFlow Surf app (iOS, Android) lets you share real-time wave and wind conditions with friends, as well as receive videos and updates on weather in your favorite surf spots.
7. Boardline app (iOS, Android) helps surfers find the right board based on the dimensions, weight and style of each surfer, suggesting brands and models.

Under 2 on Appendices B some screen shots of Instagram and Facebook pages with the figures concerning the followers.

## **5. LECTURE PLAN & QUESTIONS**

Each of the phase of this case study had different goals.

After having presented Ericeira, the object of this investigation, the first section reviewed Portugal's strategic location in the Atlantic Ocean, formal recognition of the ocean as a pivotal contributor to the local economy and a source of attraction for tourists, including surfers.

The second goal was to evaluate the state of tourism in Portugal, which encompassed the essence of tourism in the global economy, tourism in Portugal and its central role to the national economy, the National Tourism Strategy 2027, and promotional campaigns by Turismo de Portugal. In addition, reviews surf tourism, sports tourism, sports events and the centrality of the

ocean in the advancement of Brand Portugal. The third goal was to evaluate surfing in Portugal and the growth of the sport, including its recognition in the Olympics, the essence of surfing events in Portugal and its domino relevance to the national image, the profile of individual surfers and the state of the surf economy in Ericeira.

The study provides a general summary of the impact of surfing on tourism in the Ericeira municipality and the extent to which surfing has contributed to the acceptance of new life style the local population. In brief, the ocean has a central role to the economy of Portugal, especially given the current application for the expansion of the exclusive economic zone, development of the MSP to guide the sustainable exploitation of marine resources.

Task: The investigation of the influence of surfing and surf tourism on Ericeira municipality

Media: TV channels, YouTube videos and online newspapers and social networks

The following questions emerged from the case study to be considered the subjects to be posed to the students

1. Which factors contributed to Portugal's successful exploitation of surfing as a sport and tourism product compared to other European countries?
2. Can Portugal's model of surfing marketing succeed in other European countries with extensive coastlines such as the UK, France or Spain?
3. Which measures need Portugal to implement in order to sustain the growth in surf tourism over the long term despite the economic shocks within the Eurozone?
4. Can surf tourism lead to the development of other tourism products?

## **6. RESOLUTION**

Sports tourism and sports events in Portugal are integral to the sustainability of the sector and offset reduced demand during the off-peak season. In general, the exploitation of active sports events (such as surfing and golf) and sports tourism could help sustain the growth recorded in the sector especially because Portugal is recognized internationally as a sun and sea tourism destination. The country is also recognized as a golf tourism destination (Hudson & Hudson, 2010).

The study has illustrated that the growth of surfing in Portugal and more precisely in Ericeira, as the only surf reserve in Europe. The growth of surfing was catalyzing by changing

mindsets concerning surfing. Previously, surfing was not considered as a good sport. The transformation of social perspective contributed to the growth of surfing sports, which in turn led to the professionalization of the sector and the hosting of international surf events.

Portugal should maintain its position as Europe's preferred surfing destination due to the aggressive campaigns initiated by Turismo de Portugal, and other stakeholders. In brief, surfing has enhanced tourism arrivals as evidenced by the constant flow of foreign and local tourists in Ericeira. Nonetheless, the potential of the sector has not been fully exploited.

In brief, Portugal is a modern, sophisticated and future-oriented country combining tradition, innovation and geographic proximity (Figure 29). A welcoming nation, filled with sunshine, breathtaking landscapes and a unique gastronomy, open and multicultural society. In addition, there are concerns about over tourism, the necessity of defending the natural resources, create legal frameworks for the defense of tourism and surf, capacity of preserving the country and people identity in all fields and means. Positive, economic increase and development of Ericeira, surf as a mean for open of mentalities, projection of Portugal as touristic destination, image of a modern country, new mentalities, difference acceptance.

The main limitation was the scarcity of available data on the surfing industry and surf tourism in Portugal. Moreover, vital information was missing from peer-reviewed literature such as the tourists' profile and expenditure per trip, the global economic impact of surf tourism and surf events held in Ericeira. Upcoming studies should address the themes that were not reviewed in the current research such as surfing economy in other localities apart from Ericeira. Moreover, the effect of probable Brexit on tourism flows should be considered, due to a majority of the surf tourists originated from the United Kingdom.

The economic implications of surfing have been explored in published research (Estudo de Caso, 2019; Portugal, Campos, Martins, & Melo, 2017; Silva, 2017). Based on Ponting & O'Brien (2014) study of Liberalizing Nirvana, the development and growth of surfing is premised on safeguarding the surfer's dream and alternative production and consumption in the surf industry. The case study also illustrated that surfing had a positive impact on the host communities in terms of job opportunities and growth of surf and tourism-related businesses. In the recent past Portugal has also recorded an increase in eco-tourism in line with the national tourism strategy and policies initiated by Turismo de Portugal. Eco-tourism is preferred because it is a form of tourism with minimal adverse ecological implications. In general, the growth of the

tourism sector is dependent on sustainable management practices including limiting events that impact ocean/marine ecosystems, promotion of environmental protection and exploration of complementary sports such as golf.

Golf is considered one of the top ten strategic goals included in the National Tourism Strategy 2027; Portugal is recognized internationally as a sun and sea tourism destination, (main tourism product of the country) however it is also recognized as a golf tourism destination (Hudson & Hudson, 2010). There are currently 91 golf courses in Portugal, mainly in the southern region of the Algarve, followed by Lisbon.

According to a study by the Algarve Tourist Authority (ATA), Golf tourism in that region generated about €500 million in 2017 and created or kept 16,800 jobs. In 2018 the country won the World's Best Golf Destination award for 5th year. On that occasion, Luis Araujo of Turismo de Portugal, noted that "the demand for golf, contributes significantly to the existence of tourist activity throughout the year - one of the main aims of Strategy 2027." The same intensive and long-term approach should be applied to surf and surf tourism; an equally all year round sport in Portugal.

Ericeira should trail the path started by The Gold Coast, an equally World Surf Reserve in Australia; the first goal was the implementation of a Sport Plan for 10 years as a vision towards the growth of nautical sports in the location. The second framework, the Economic Development Strategy 2023 was designed to improve the reputation of the destination for surf tourism and ocean related businesses with the inherent increase and development in employment, new infrastructure and innovation. The Ocean Beaches Strategy aimed the defense and protection of the natural resources by implementing the reengineering for the perseveration of the coastal and ocean areas. And finally the Surf Management Plan as a recognition of importance and relevance the own surf breaks for the locals and for the future. All tools are under the city umbrella coordination and subject to local and governmental legislation.

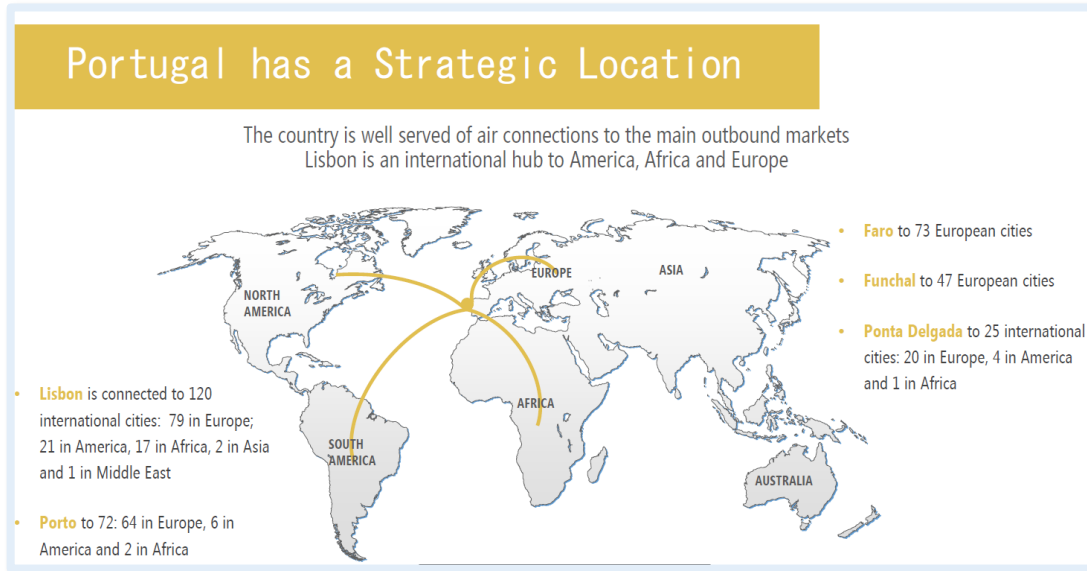


Figure 29: Strategic location of Portugal

## 7. MANAGEMENT CONCLUSION

This study is intended to be used as a tool for future research, for local official decision making, and for the local surf community and market that directly benefits from the existence of the waves and the tourism it brings.

This study shows that the Ocean has been central to the economy of Portugal since the age of the explorers. The conquest of the sea helped to propel Portugal into becoming one of the leading maritime powers. Exactly 500 years ago, September 1519, Fernão de Magalhães started the historical Journey of the Circumnavigation of the globe. The favorable international commitments have encouraged the development of a Sea Economy with important sea-related projects and investments in Portugal. Universities and research centers in Portugal, with a substantial capability to boost R&D and innovation in various activities related to the Economy of the Sea, are expanding. It is already accepted that the Economy of the Sea is much wider than simply the fishing industry. As one of the largest Exclusive Economic Zones (EEZ) in the world with a privileged geostrategic location, Portugal has a double responsibility towards the country and the world, to defend, explore, develop and sustain such richness.

The tourism and leisure sectors related to the sea, are of most relevance in the Economy of the Sea sector in Portugal. The growth prospects for the ocean economy, its capacity for the creation of future employment and innovation, and its role in addressing global challenges is still



to be explored. New challenges such as energy security, environment, climate change and food security are being addressed.

The National Tourism Strategy 2027 estimates a greater dispersion of tourists throughout the whole year, with this flow being reflected more broadly in the whole country. Tourism will be the economy, but it will also be the preservation and appreciation of the national and cultural heritage; competitiveness and innovation, qualification and inclusion of activities and residents.

The tourism industry has been growing in the last decades and should continue to be a driver for development and positive impact for locals. The growth illustrates that the sector has continued to experience sustainable growth over time. Therefore, the adoption of the National Ocean Strategy 2013-2020, Tourism Strategy 2027, the MSP and the establishment of the Ministry for the Sea, would sustain this growth and also increase the country's competitive advantage in the tourism sector relative to other nations within the EU.

The new tourism models, with the general acceptance of low-cost airlines and the peer-to-peer accommodation offer, gave a significant impulse to the figures and results. This new model has certainly influenced the growth of the incoming surfing tourism. The aggressive and modern campaigns contributed to a new image of the Destination Portugal; a modern, sophisticated and future-oriented country. The campaigns should address the so called “Millennials”, who prefer and look for local experiences; either cultural, natural, artistic or sporting. They are able to shape a mainstream tourism; they are adventurous, adopt new technologies and destinations. Additionally, domestic tourism still needs to be encouraged and incremented as an additional mean to bridge the decrease during the off-peak seasons. The stakeholders should accept the importance of the national tourist and promote distinct offers for this public during certain periods.

The traditional tourism “Sun & beach” in Europe is facing important challenges for the future (like seasonality, pressure on territory sustainability) and Portugal should continue to defend sports tourism in Portugal, which had vast potential to mature and to grow. The promotion of feasible and agreeable sports in those low seasons is absolutely necessary. Golf has already proven this. Surfing has therefore an important role in this matter. Surfing is having a considerable impact on the Portuguese economy. However, until now, it has been capitalized mainly through two dimensions: One is the role as a touristic product – the capability to produce world-class events, showcase the incredible waves and develop the infrastructure needed to

ensure the international community experience surfing in Portugal. Another dimension is the attraction of attention from media and social networks towards the performances by Portuguese surfers; and in this case the presence in the Olympic Games 2020 will be an important global launch pad.

There is also a third dimension that needs to be faced and addressed as decisive tool and mean for the future; namely the industry itself. It is globally accepted that the impact and value of surfing are difficult to measure due to lack of data and mainly the inexistence of an entity able to comprehend surfing in Portugal in all its dimensions. This investigation showed that information in Portugal is rare, very dispersed, not duly treated; most of the data is concentrated in various municipalities and entities, not allowing a global view of the industry in Portugal and limiting a wider and deeper approach.

The act of surfing does not have an explicit value attached to it and trying to measure the actual value of the activity of surfing can be difficult, as is trying only to measure the impact it has on the coastal economies. Scattered research has attempted to place a value on specific aspects of surfing, but to date, no overall framework has been developed to calculate surfing's impact on the coastal communities and globally in the country. This is crucial for surfing to be seen and accepted as a viable industry and as a part of coastal economies.

Other World Surf Reserves dedicated by Save the Waves Coalition were already subject to an economic case study. Through Surfeconomics the economic value of a wave and of surfing to the local coastal communities and globally to the country can be evaluated and the results are a decisive tool for the stakeholders and governments to take better decision on the protection of their coastal resources and waves. Only by defending the natural richness, the surf industry is able to grow. Negative impacts to the surfing features may have serious consequences for the local population, visitors, to the local surf industry, tourism and to entire country economy. The industry needs rules, but everything must be thought out on a case-by-case basis, location by location, according to the needs of each beach, and for this it is necessary that those who know the realities of each region be heard and interfere.

The inexistence of such a comprehensive entity may put a clear plan for the advancement of surfing at risk due to the primary challenges of the absence of a robust framework. In order for surfing to be duly considered as a key tourism activity and as an important industry, wider research of all aspects needs to be done. There are some academic works on the subject, the

municipalities frequently release figures, but better data needs to be gathered by the industry itself under a governmental instrument.

To truly understand the value that surf, as recreational resource, brings to the region additional research should be done on the value of the wave and surfing to the village and its visitors, both on a cultural and individual level. In addition, an economic impact and possibly a travel cost study should be carried-out during the EDP Billabong Pro Ericeira, World Surf Leaguer, in order to fully understand the event's impact and value to the region. For surfing and surf tourism to be considered an important tourism activity, increased research into its value on an economic, cultural and individual level must be done. Industry, local and governmental entities need to gather better data and surfing must be considered part of the growing eco and nature-based tourism markets. Without additional research into the true value of surfing, in Portugal and more precisely in Ericeira many important economic and cultural sites could be lost.

It is imperative to defend the Portuguese rich maritime resources and the coastal environment. Portugal should avoid the temptation of encouraging an unmeasured increase; either in tourism or in surfing; over tourism and overcrowded waters would risk all that has been already achieved in such a short time. Ten years after Save the Waves was founded, Ericeira was designated as the second global and the first European World Surfing Reserve in 2011; the former President of Portugal released a statement endorsing the Ericeira World Surfing Reserve and it was officially acknowledged in the Portuguese National Assembly. Portugal, has a double responsibility on the preservation and defense of such richness, by implementing the necessary tools, means and frameworks.

*“You, the Portuguese, whose territory consists of 3% land and 97% sea, whose history is viscerally connected to the seas, who know so well the risks the sea entails, you, the Portuguese, can lead the world to seeing the sea in another light in the future.” “We are talking about the future of the planet, and this is the fight of your life. We need to leave here and do something with what we have learnt.” (John Kerry, September 2019)*

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**APPENDIX A**  
**CASE STUDY**

A1 PORTUGAL PROFILE 2019 - WORLD ECONOMIC FORUM

# Portugal

12th / 140

Travel & Tourism Competitiveness Index 2019 edition



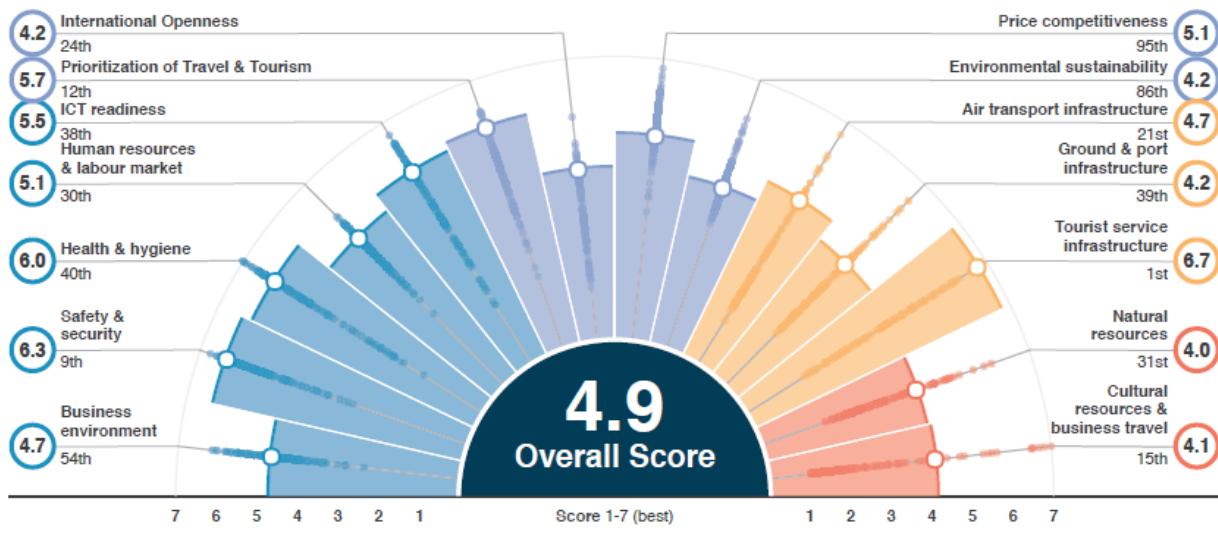
## Key Indicators

Sources: World Tourism Organization (UNWTO) and World Travel and Tourism Council (WTTC)

International tourist arrivals	21,200,000	T&T industry Share of GDP % GDP	7.1
International tourism inbound receipts	US \$17,118.7 million	T&T industry employment % of total	389,200 jobs 8.1%
Average receipts per arrival	US \$807.5	T&T industry Share of Employment % total employment	8.1
T&T industry GDP % of total	US \$16,905.0 million 7.1%		

## Performance Overview

Key Score



## Past performance

Travel & Tourism Competitiveness Edition	2015	2017	2019
Rank	15 / 141	14 / 136	12 / 140
Score	4.6	4.7	4.9

## THE ERICEIRA SURFER'S PROFILE

### A21 INQUIRY FOR THE SURVEY OF THE ERICEIRA SURFER'S PROFILE

• Age:

  
years

• Gender:

- Male
- Female

• Education level:

- Primary School
- College
- University

Annual income (Euro)

- Up until 10.000 euros
- Between 10.000 and 20.000 euros
- Between 20.000 and 50.000 euros
- More than 50.000 euros

You come from:

• City:

• Country:

- Average number of trips to Ericeira per year:

trips per year

- Average number of trips to Ericeira per year by summer:

trips per month

- Average number of days at Ericeira on each trip:

days

- Total average expenditures on each trip:

Euro

- Percentual distribution of expenses

Accommodation

Food and beverage

Travel

Surf learning

Clothes and accessories

# The Impact of Surfing on Tourism in Portugal

Other expenses

0

Why Ericeira?

• How did you meet Ericeira?

- Surf culture
- Friends
- News
- Other. Which?

• Do you stay at Ericeira?

- Yes
- No

• Where?

- Own home
- Family home
- Friends home
- Camping
- AirBnB
- Hotel
- Other. Which?

Expenses by night on accomodation?

Euro

## Food and Beverage

• Do you use local restaurants?

- Yes
- No

• Meals you do at local restaurants?

- Just for Lunch
- Just for Dinner
- For Both

• Frequency of use?

- Every days
- On most days
- At least one day

• How you prepare your meals?

- Buy groceries at stores
- Bring fruit and prepared meals

Average expense per day with food?

Euro

## The Impact of Surfing on Tourism in Portugal

- Surf is your main reason to visit Ericeira?

- Yes
- No

- How do you travel?

- By plane
- By car
- By train
- Other. How?

- You travel?

- Alone
- With company

- On average with how many people?

- You stay all time at Ericeira or go to other places

- All time at Ericeira
- I move to other places

- Which places?

• If you travel by car, you get fuel/gas at Ericeira?

- Yes
- No

Average expenditure?

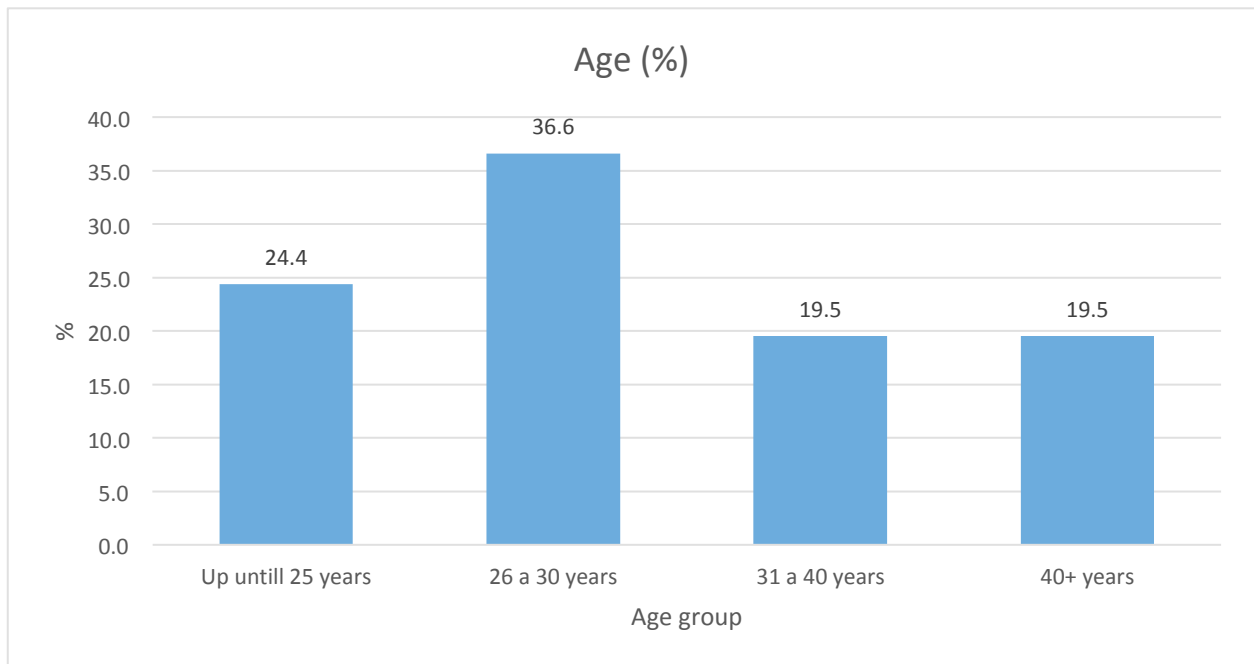
Euro

### Surf Learning

• Did You come to learn Surf?

- Yes
- No

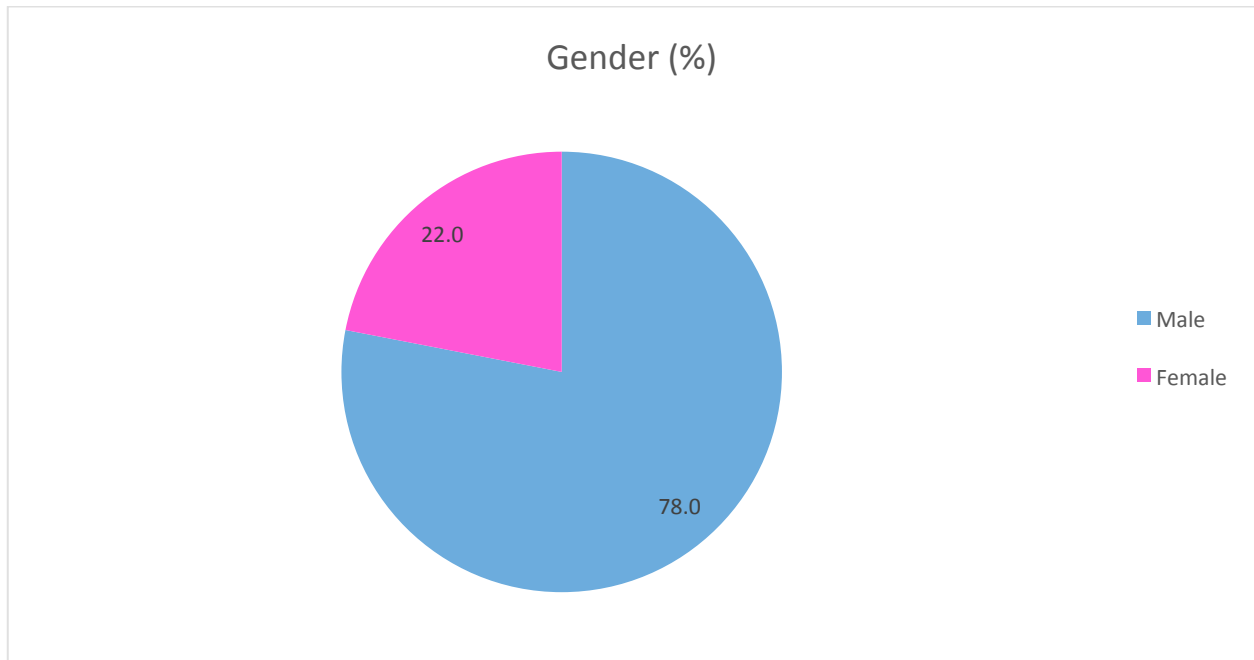
## A22 GRAPH RESULTS OF THE ERICEIRA SURFER'S PROFILE



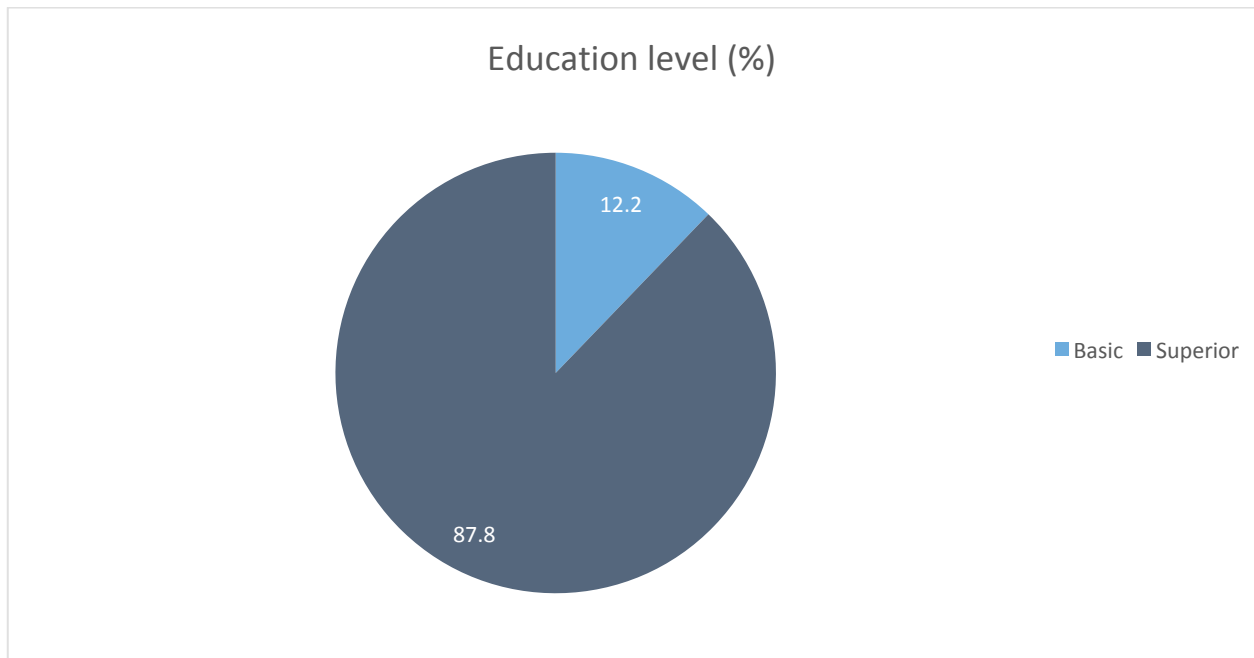
Graph 1 Age of the surfers



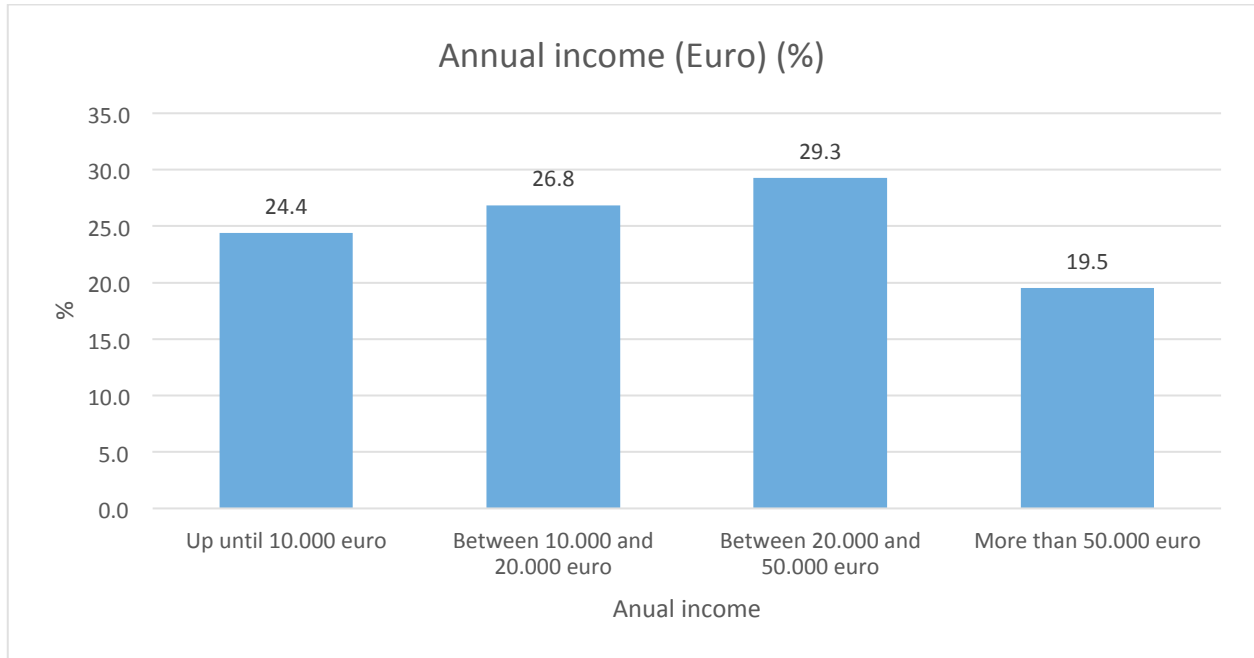
## The Impact of Surfing on Tourism in Portugal



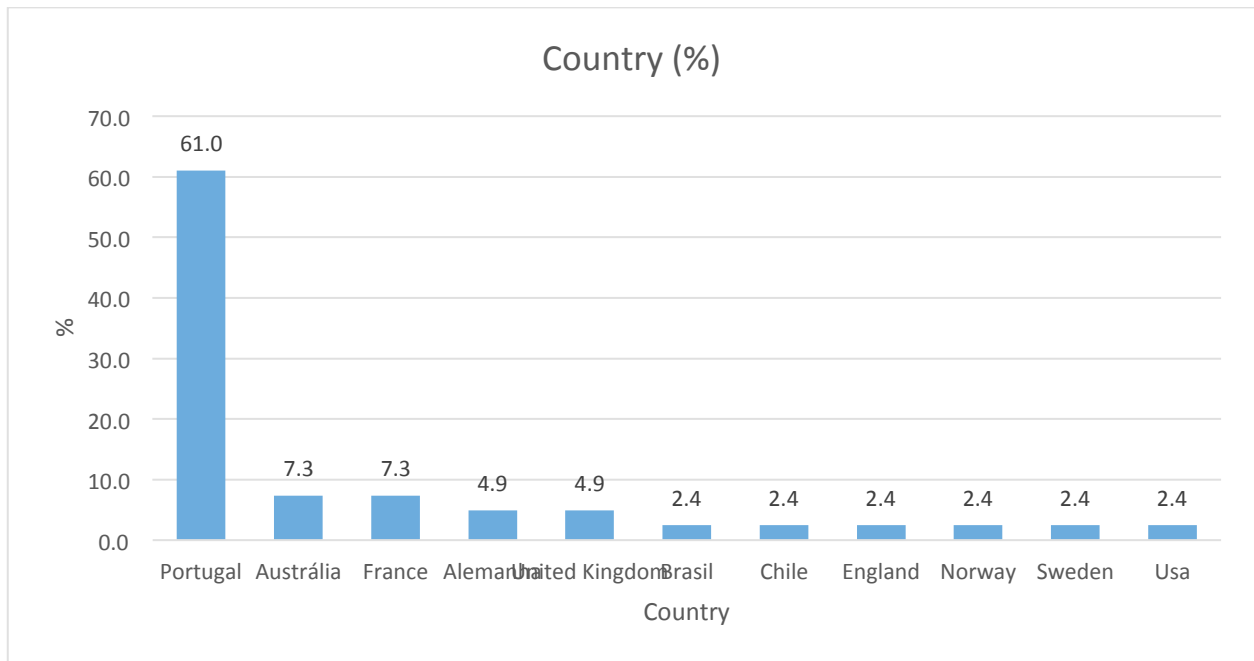
Graph 2 Gender



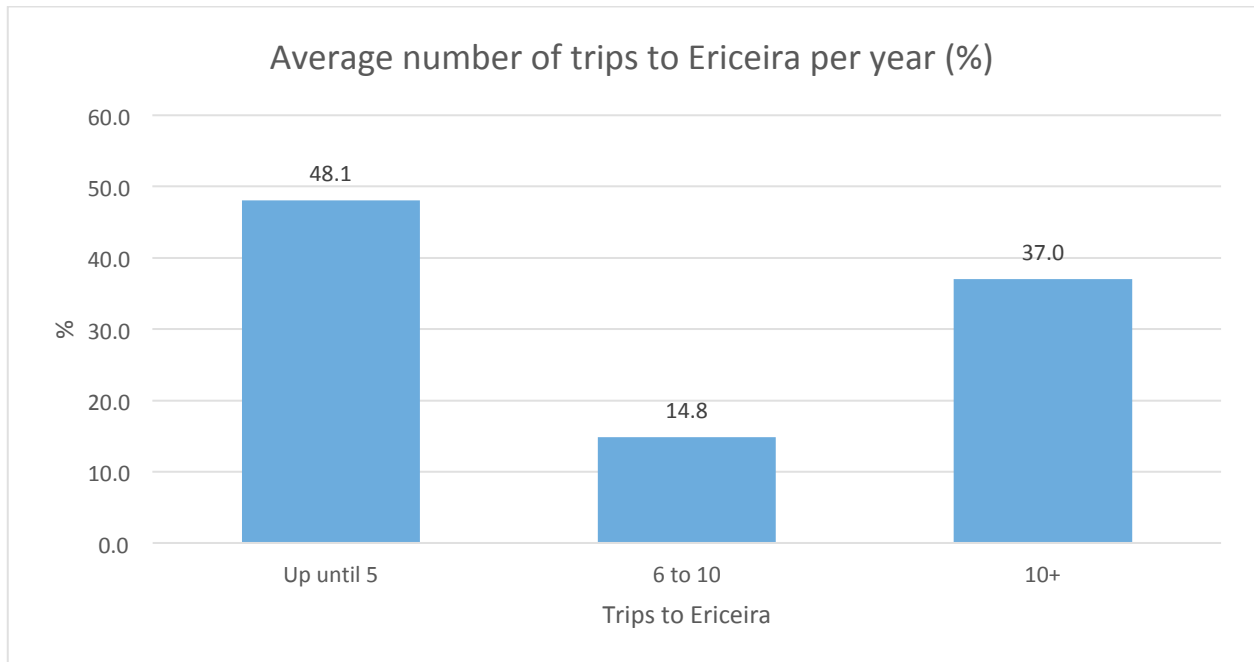
Graph 3 Educational level



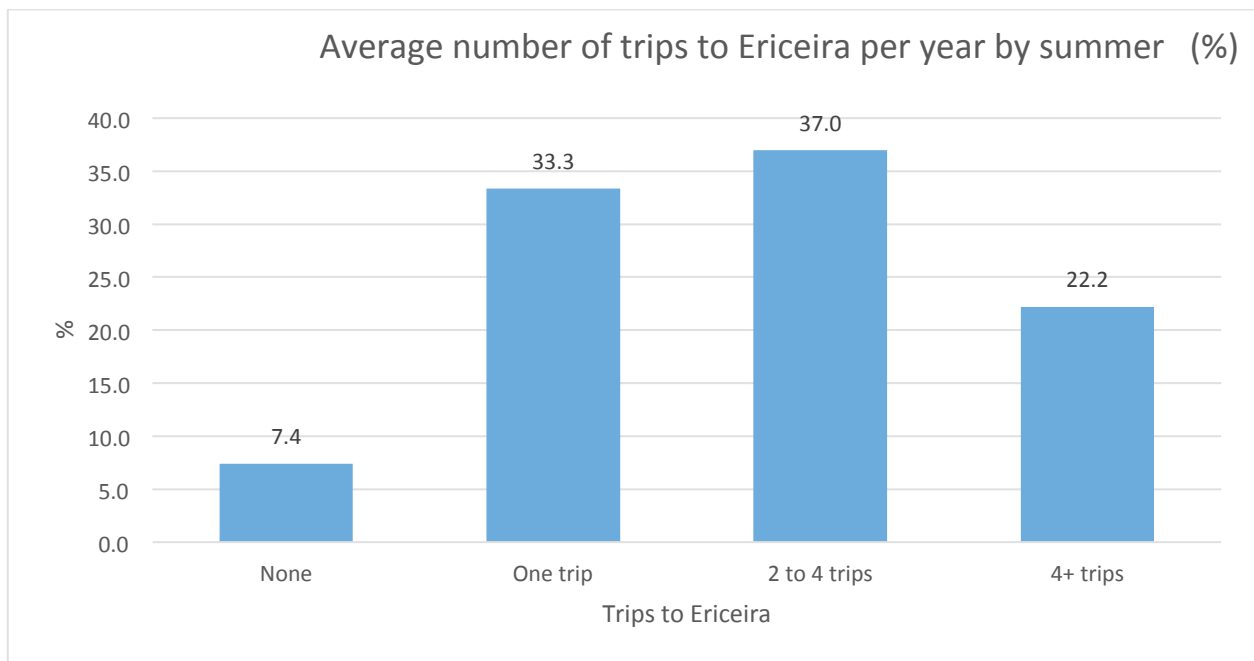
Graph 4 Annual income



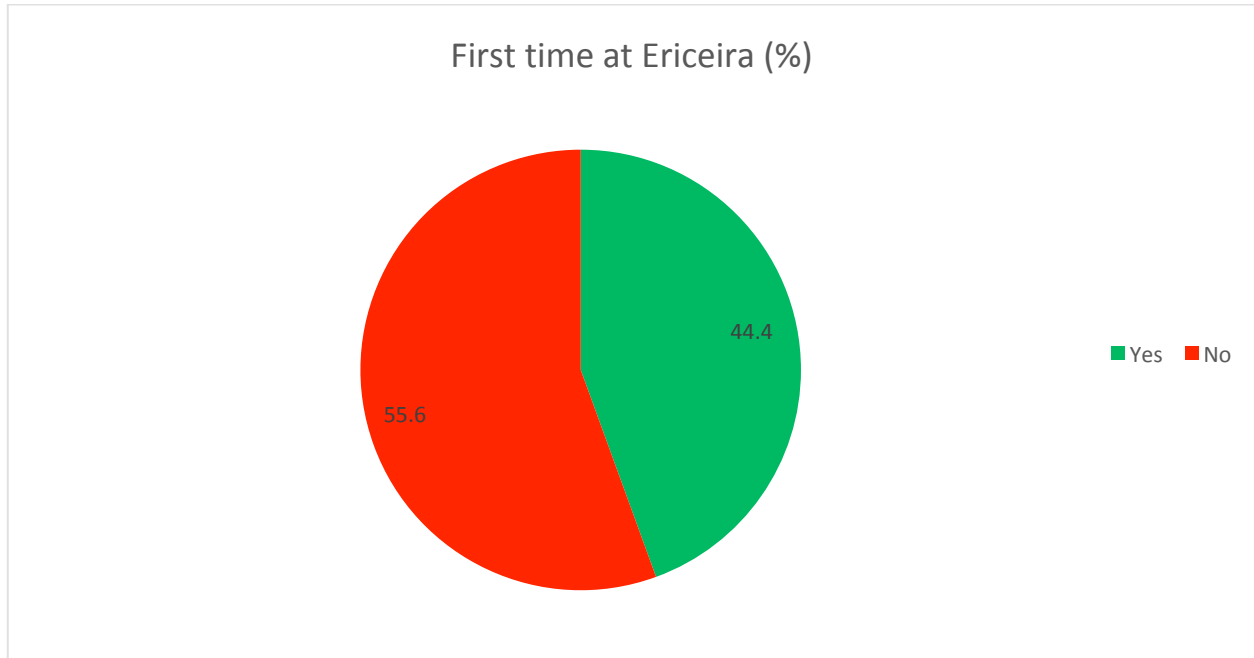
Graph 5 Country of origin



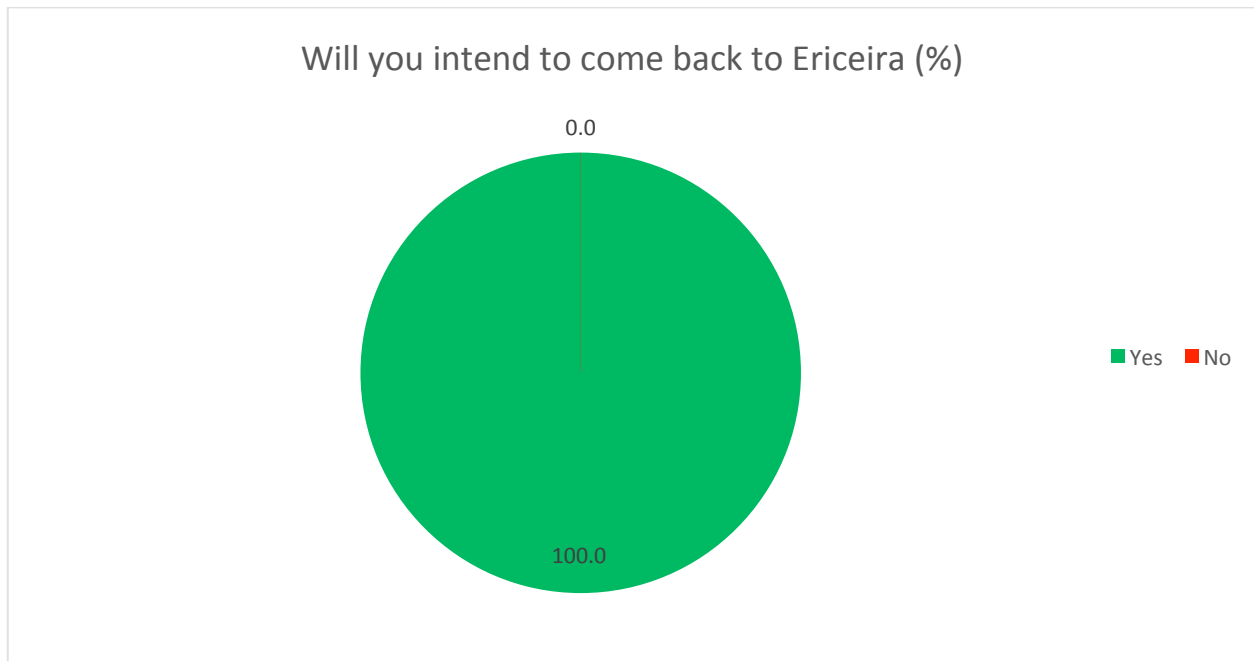
Graph 6 The number of trips made to Ericeira annually



Graph 7 Average number of summer trips

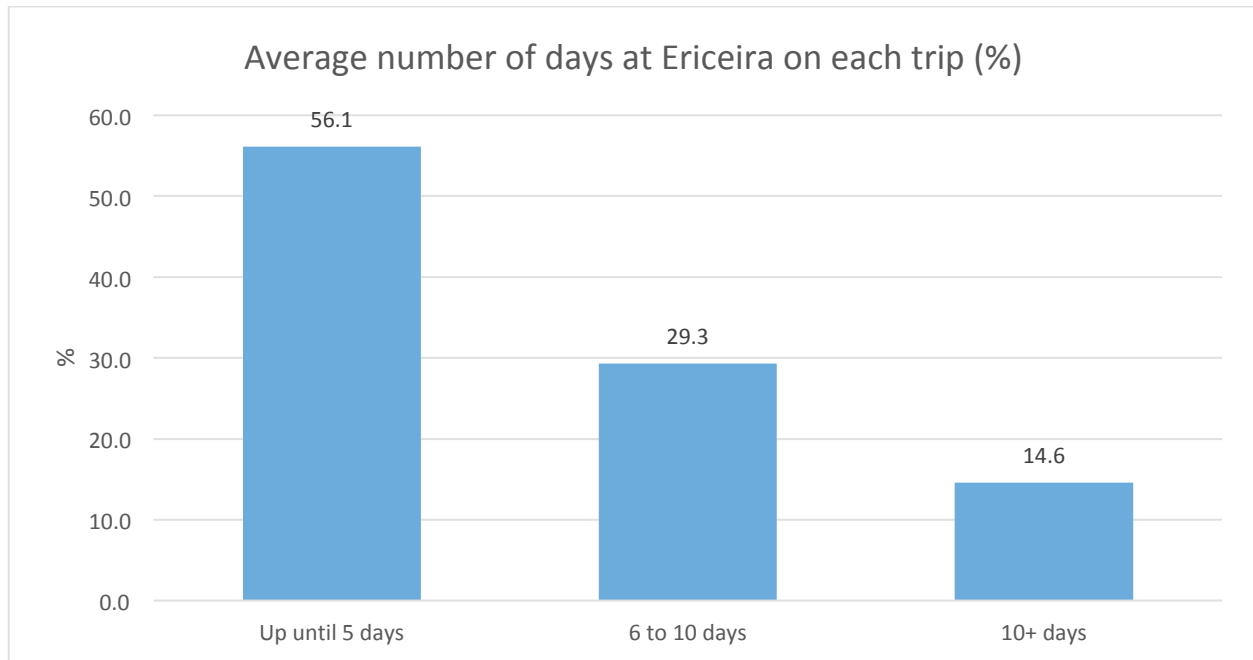


Graph 8 First visit to Ericeira

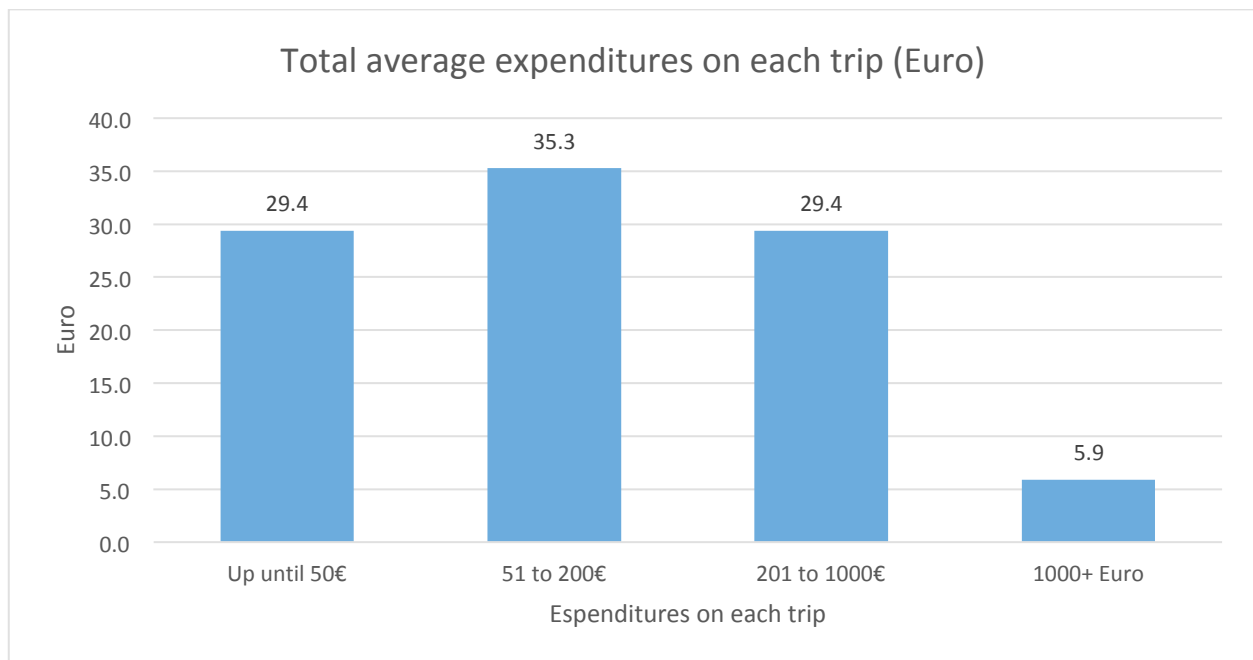


Graph 9 Intention to visit Ericeira again

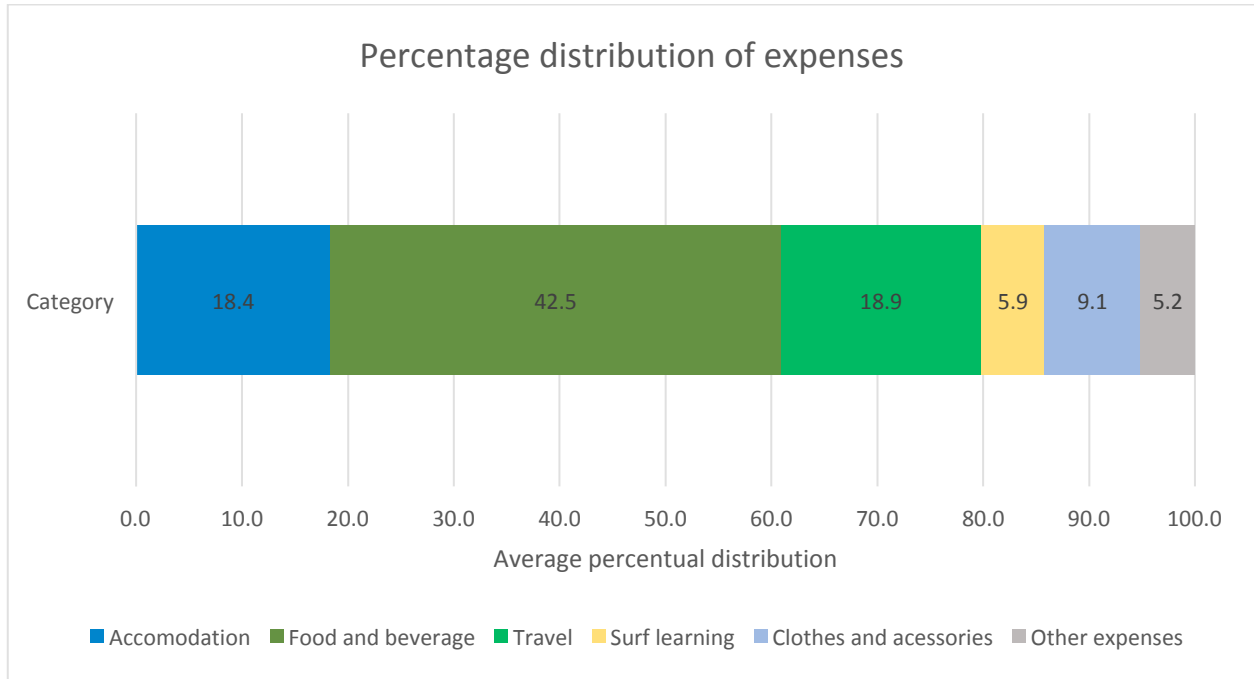
## The Impact of Surfing on Tourism in Portugal



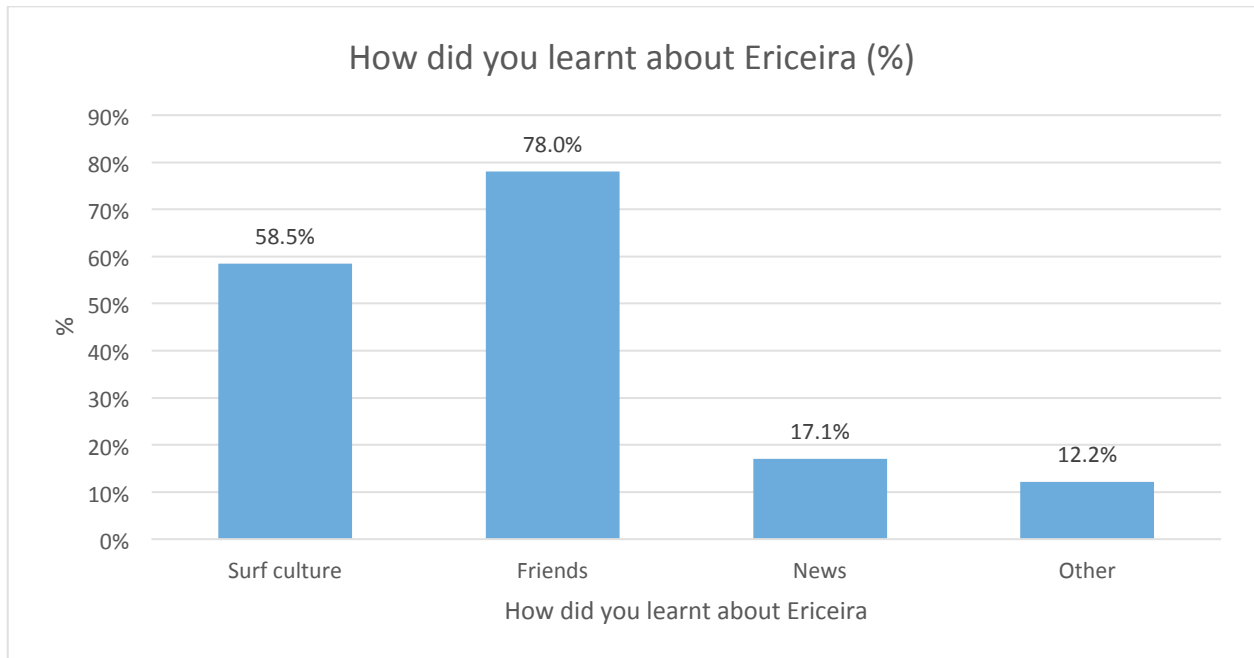
Graph 10 The average number of days spent in Ericeira during each trip



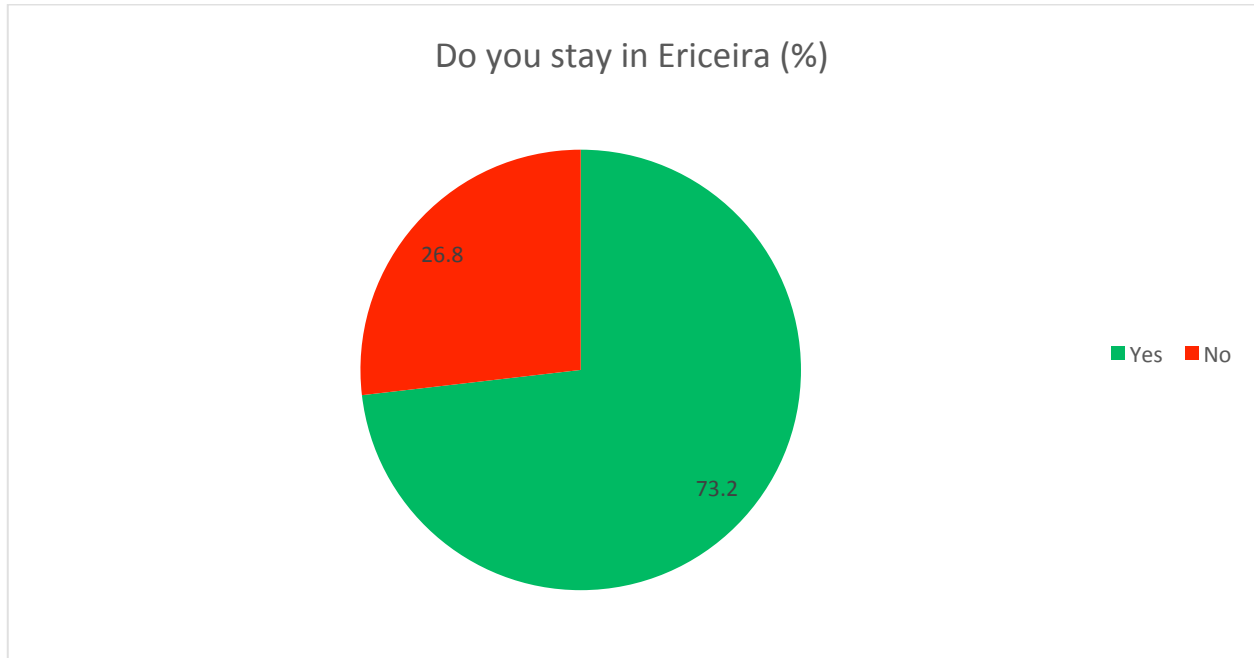
Graph 11 Expenditure on each trip



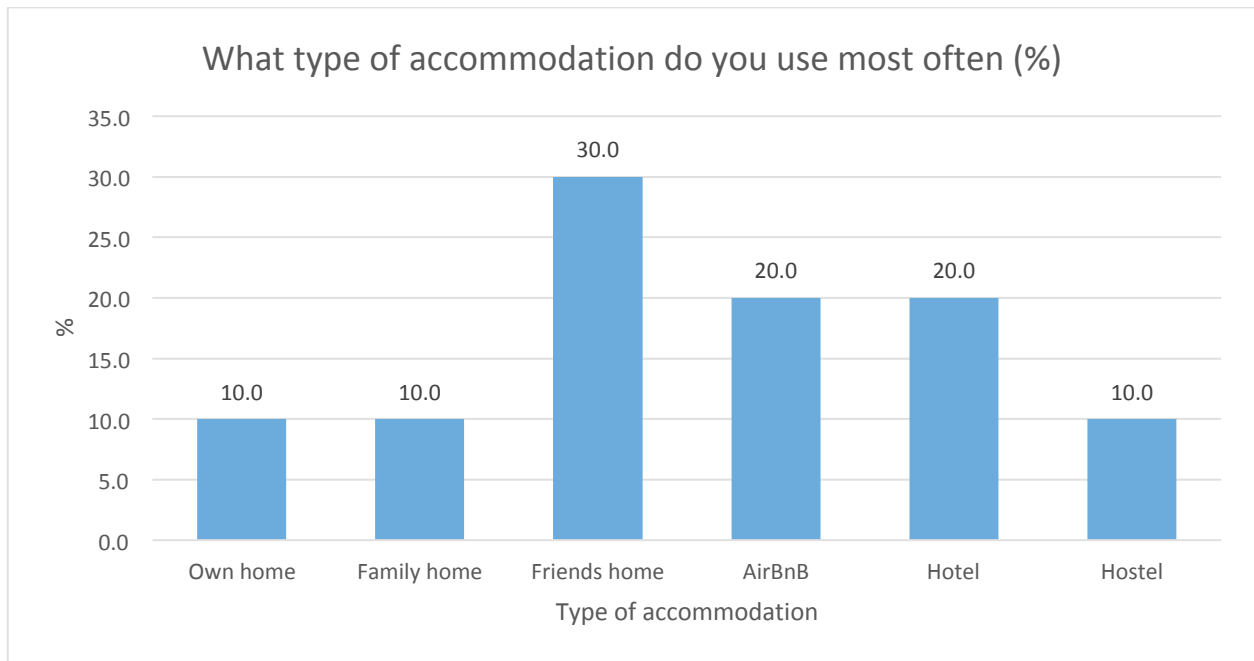
Graph 12 The percentage distribution of expenses



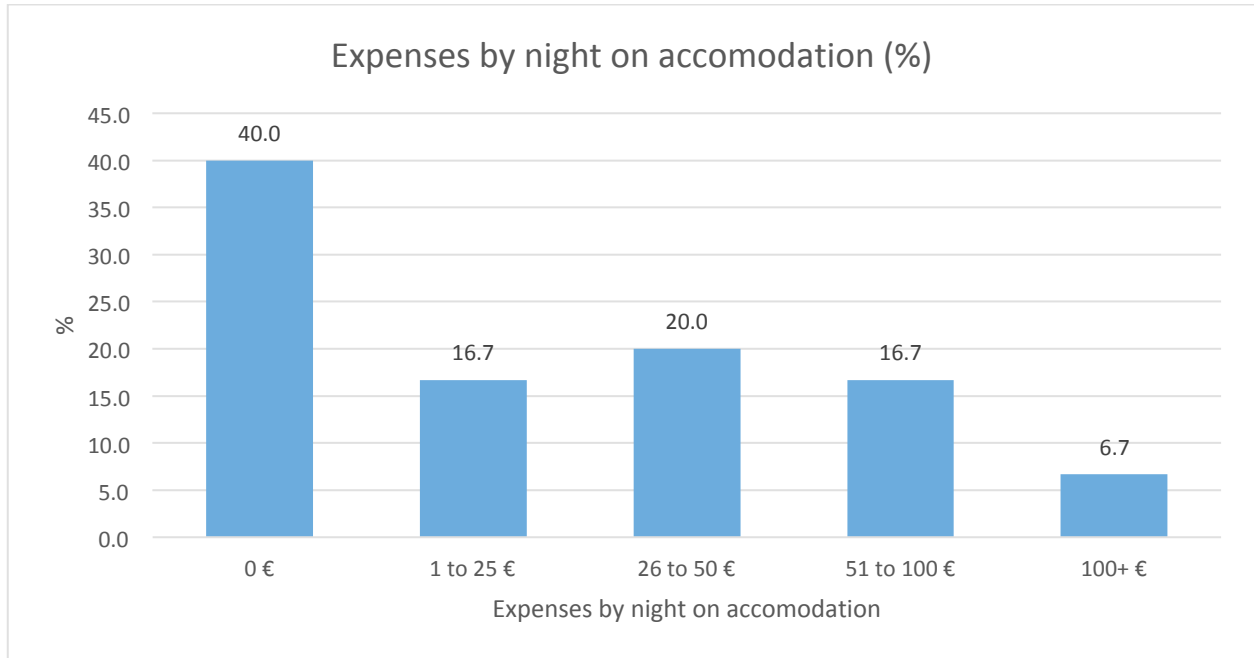
Graph 13 Source of knowledge about Ericeira



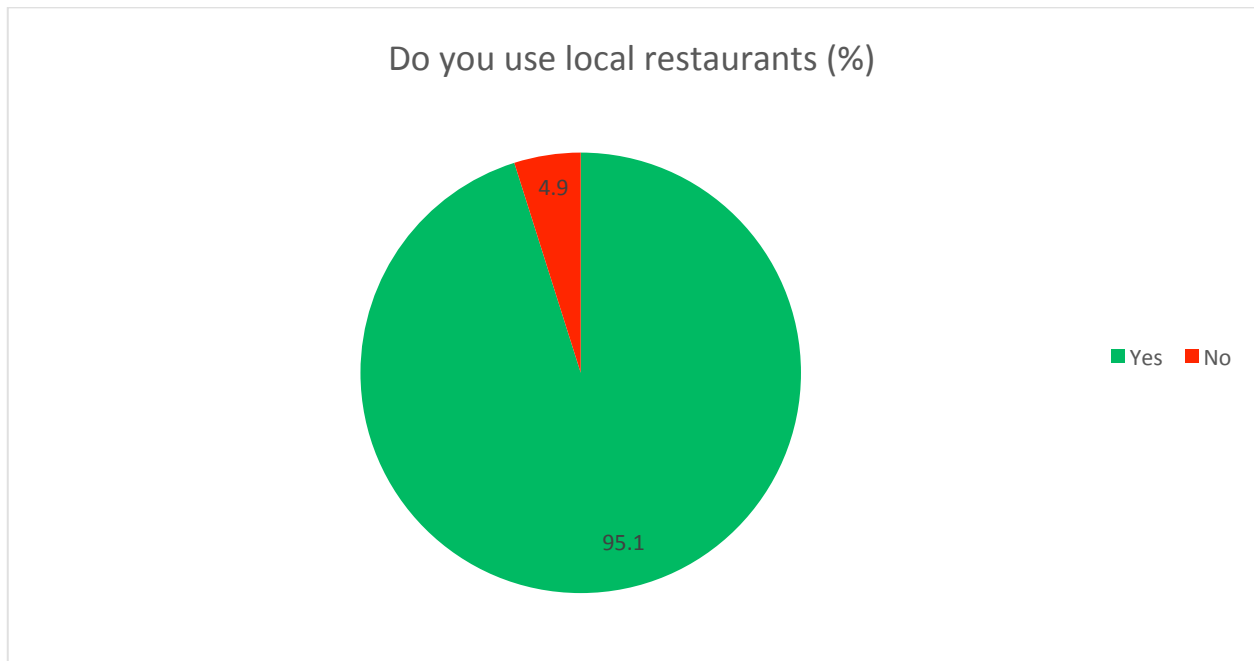
Graph 14 Status of residence in Ericeira



Graph 15 Preferred type of accommodation



Graph 16 Average expenses per night on accommodation

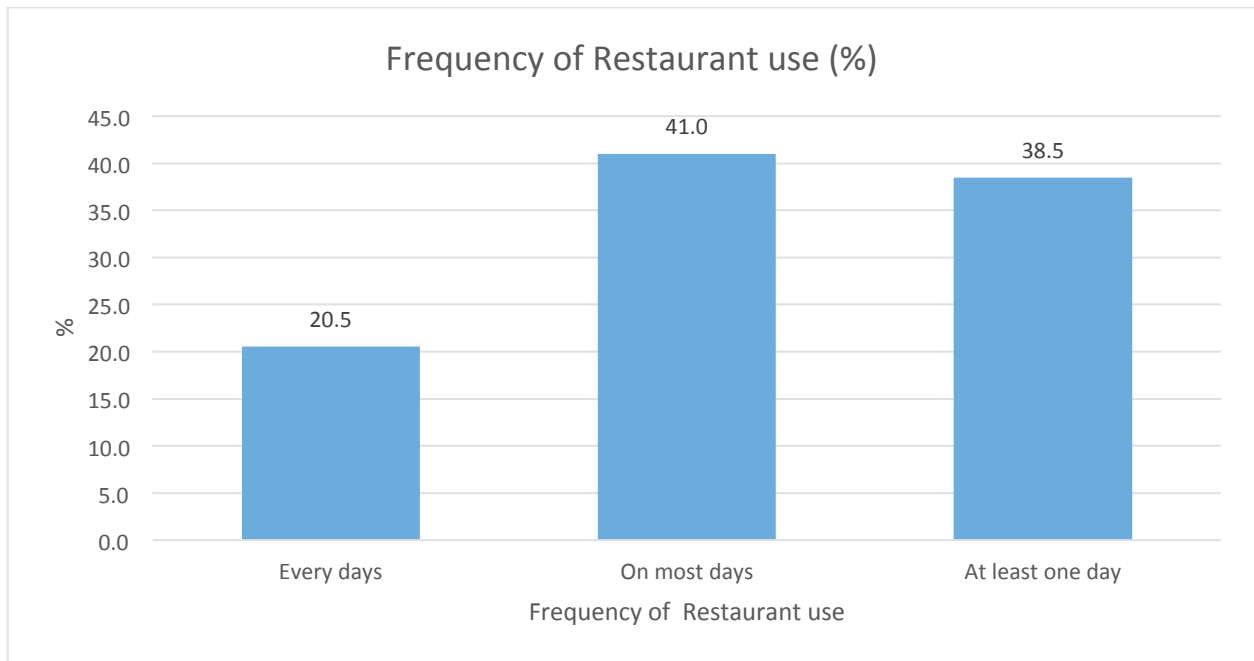


Graph 17 Usage of local restaurants

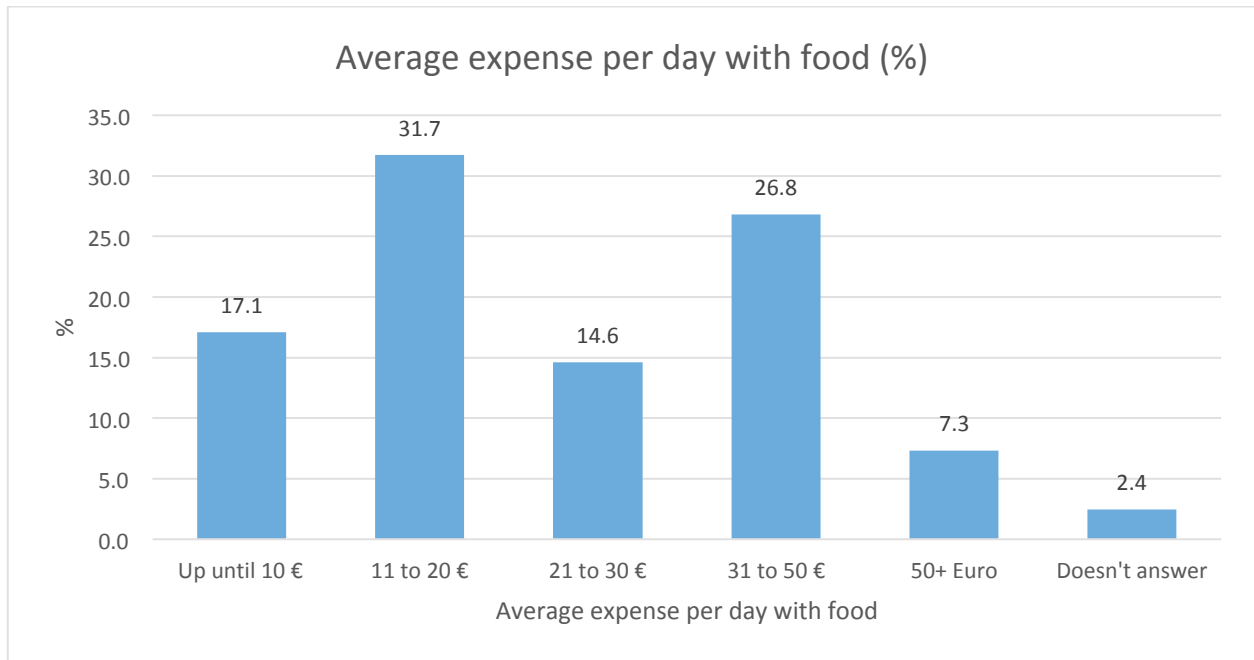




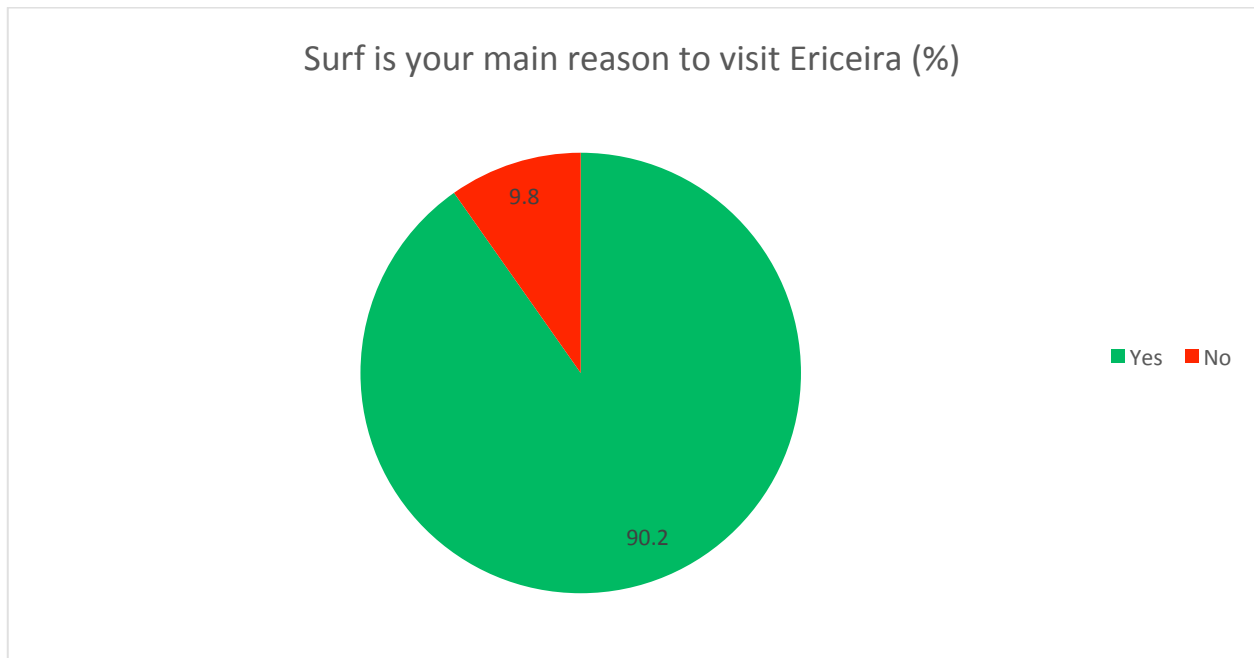
Graph 18 Meals in local restaurants



Graph 19 Frequency of restaurant use

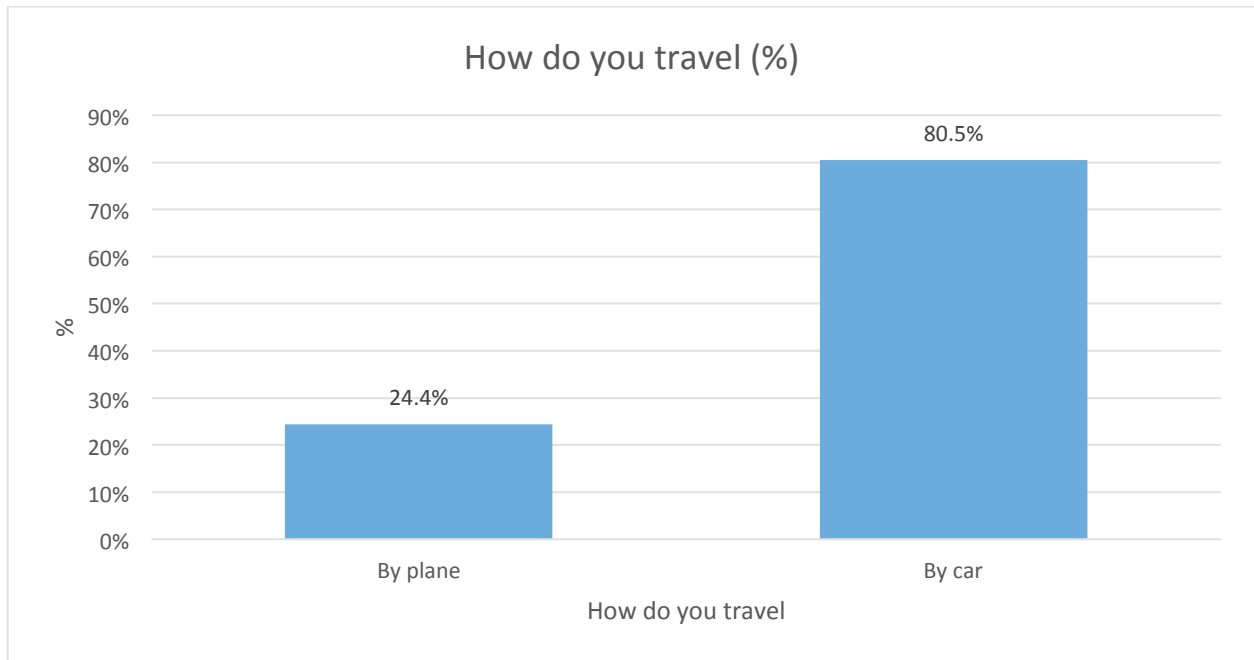


Graph 20 Average daily expenditure on food

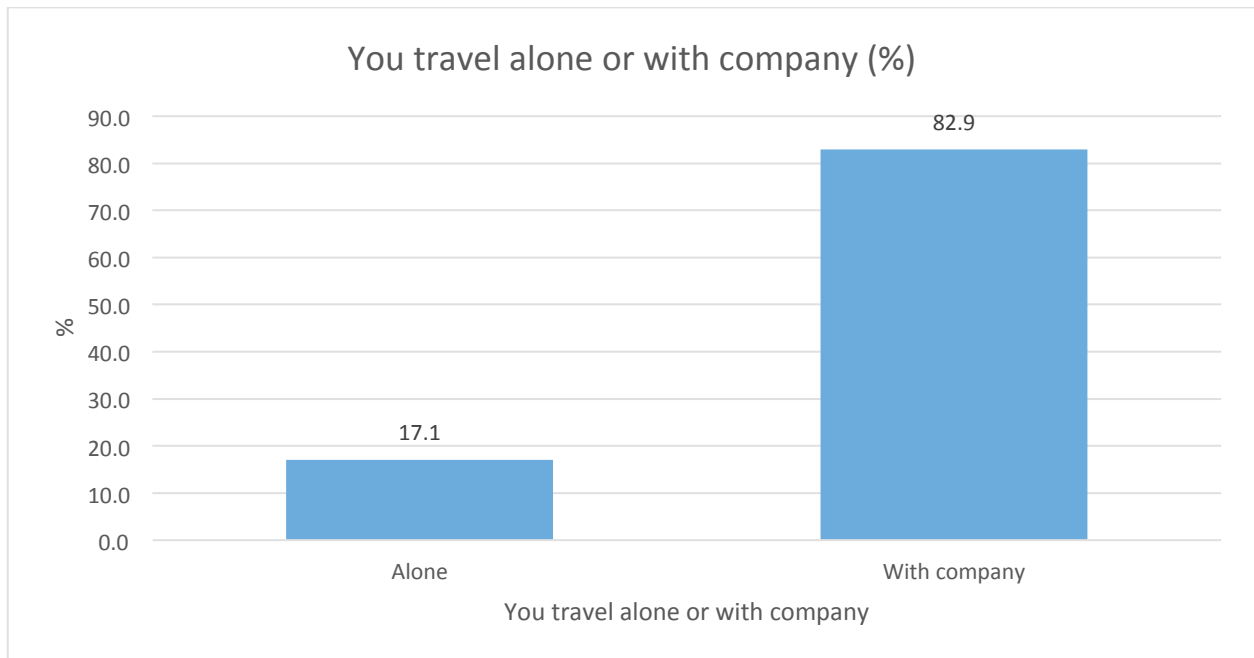


Graph 21 Surfing as the main motivation to visit Ericeira

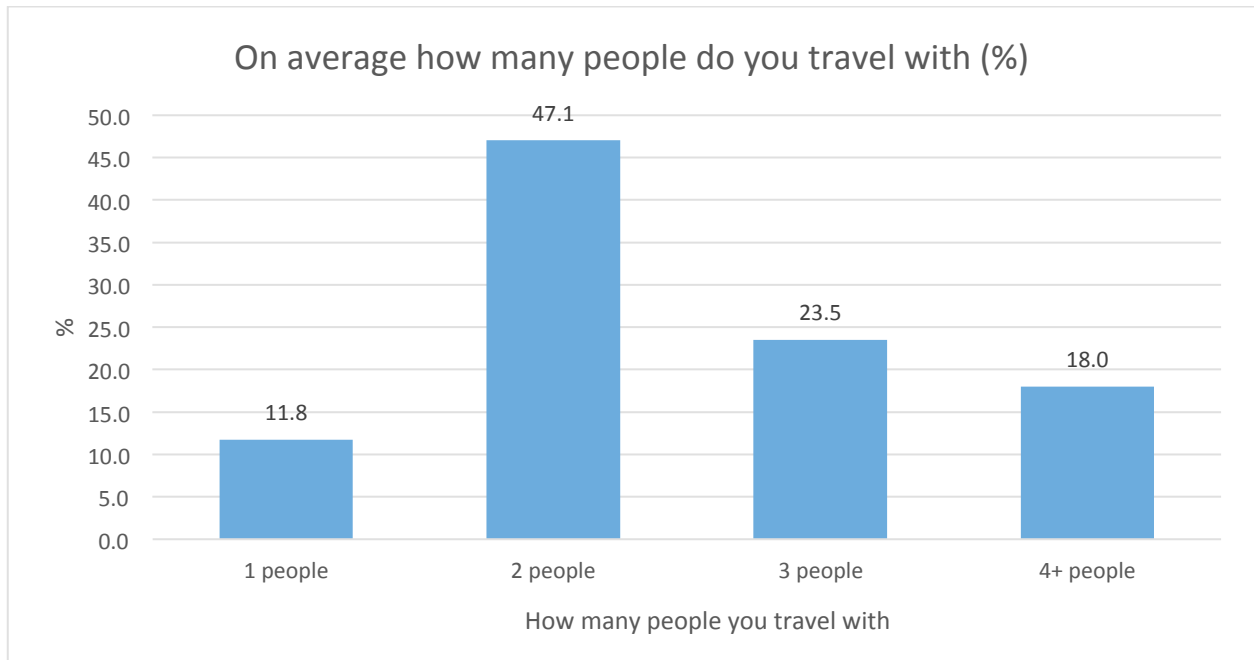
## The Impact of Surfing on Tourism in Portugal



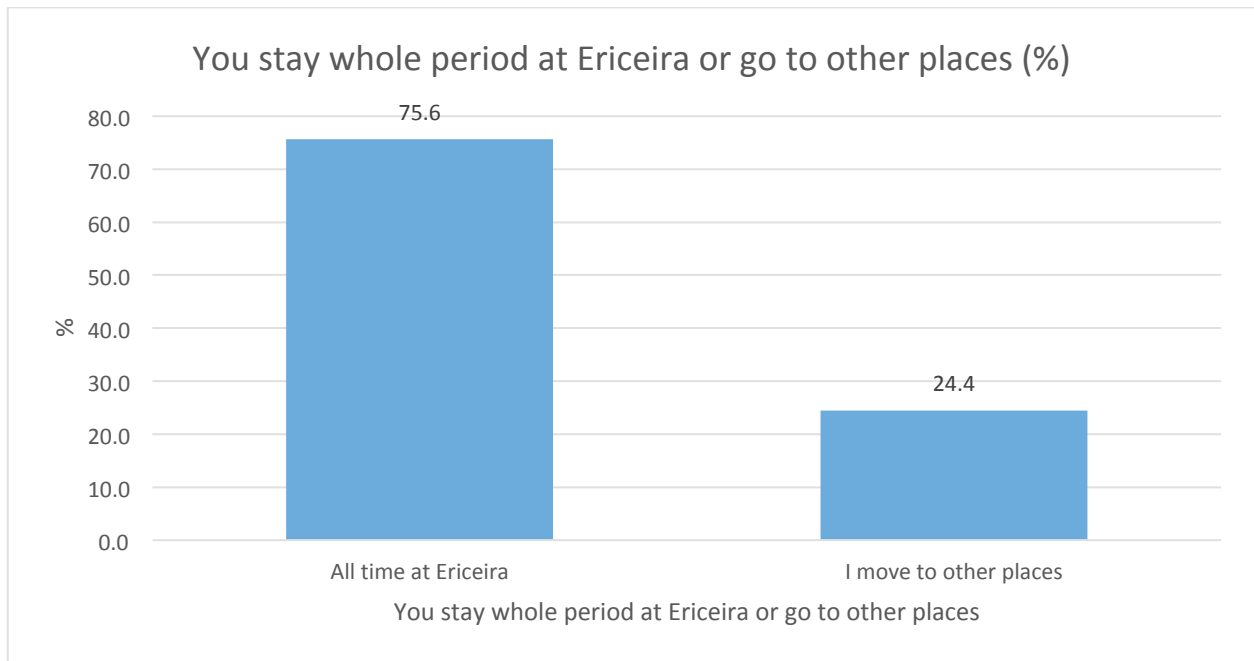
Graph 22 Preferred mode of travel



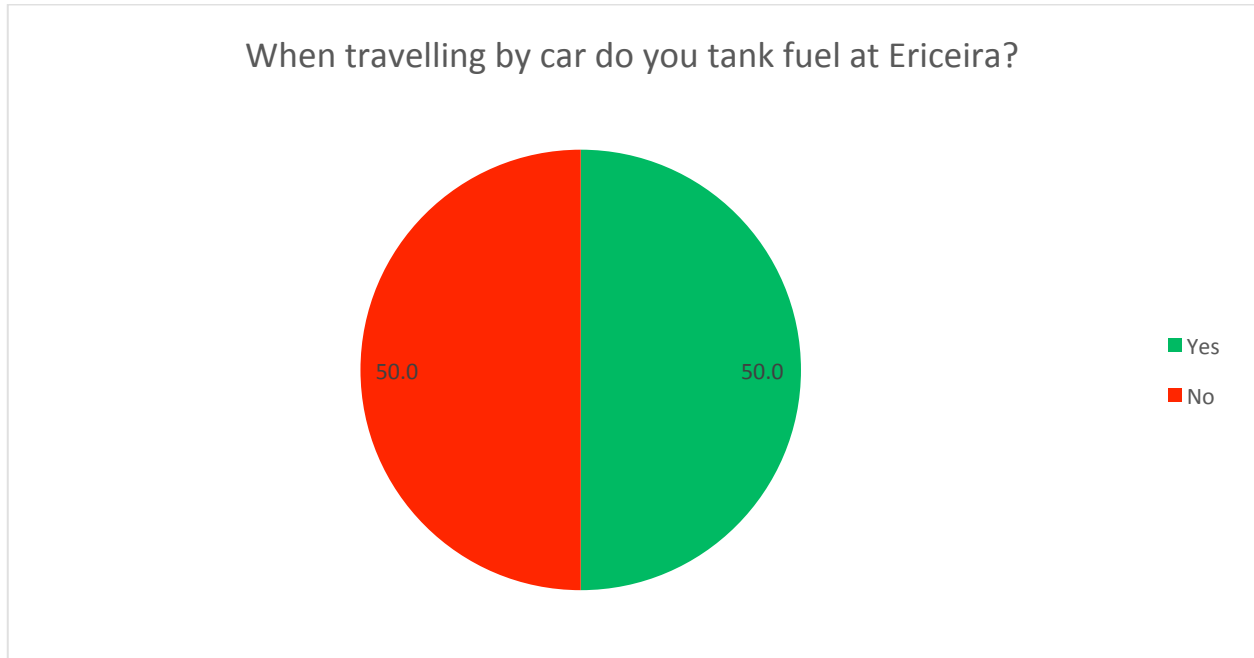
Graph 23 Travel in isolation or with company



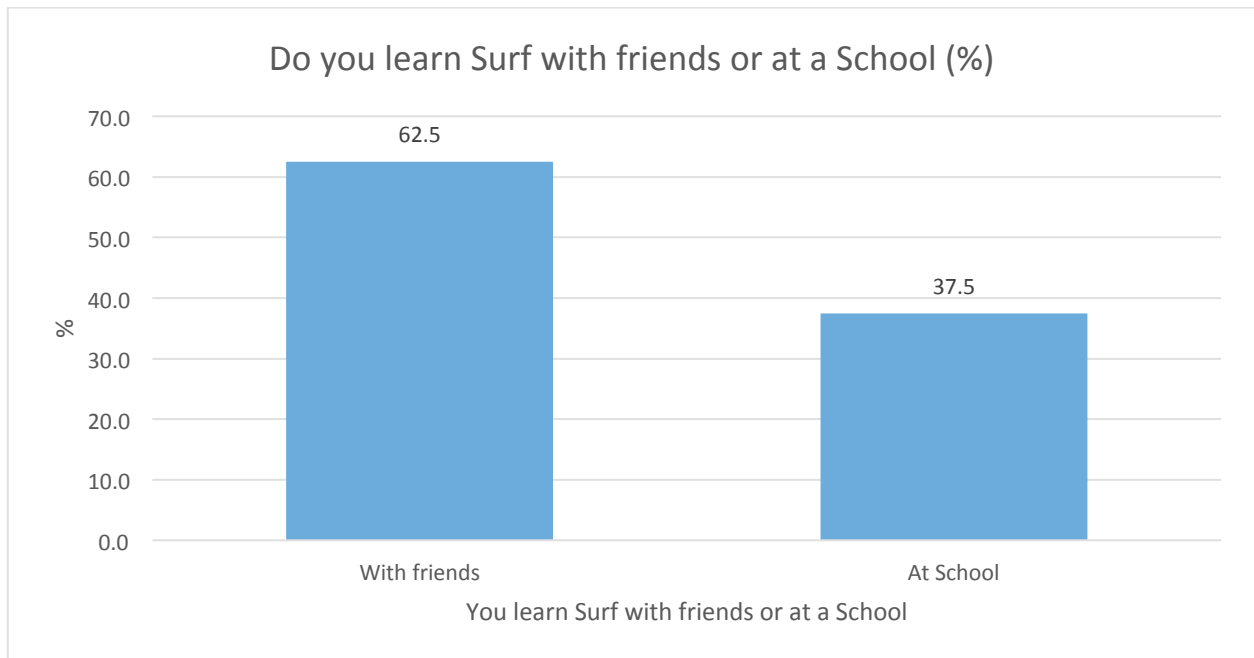
Graph 24 Size of the travel company



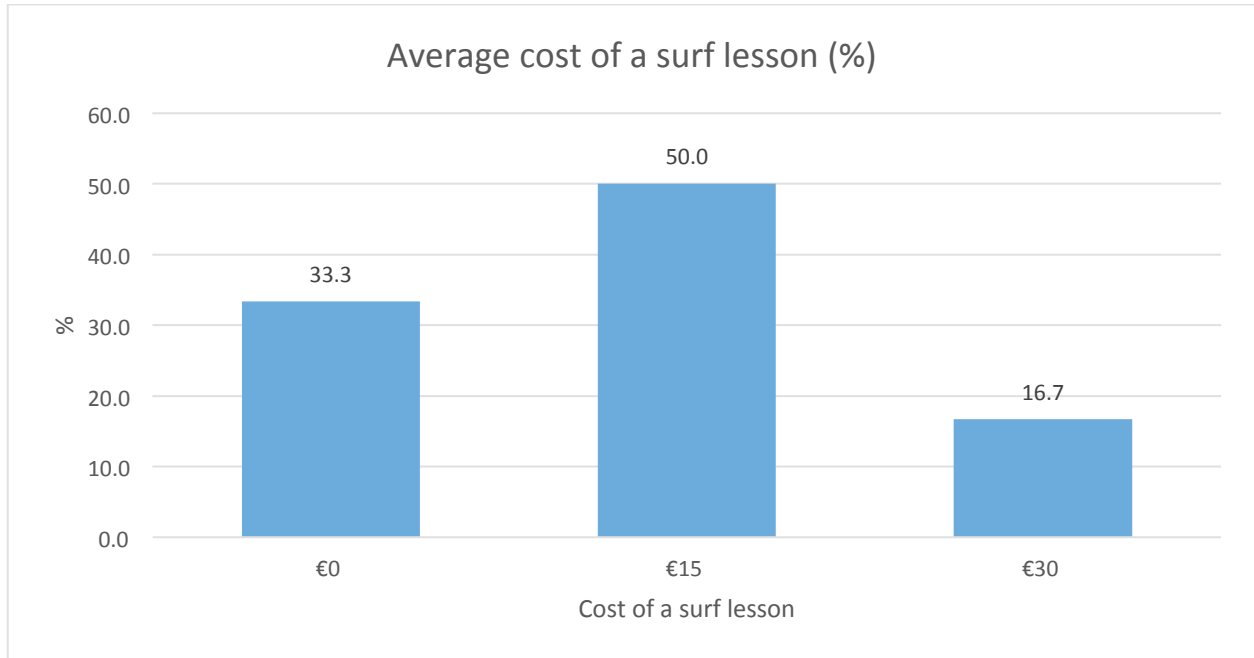
Graph 25 Tourism patterns while in Ericeira



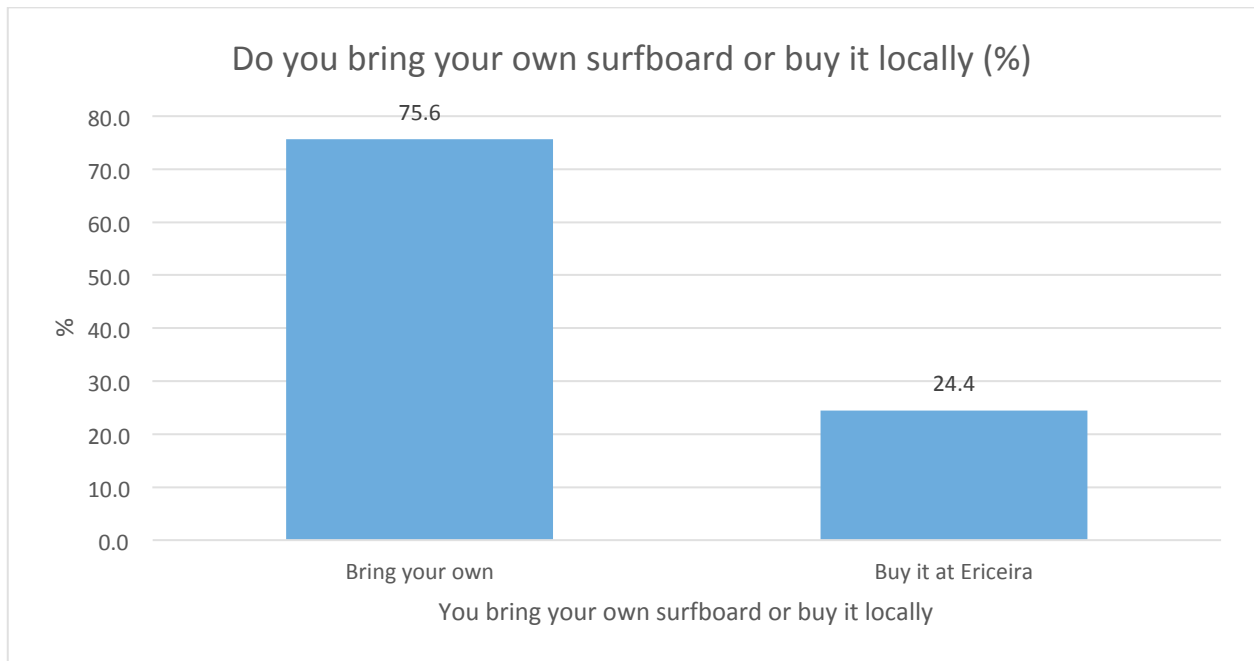
Graph 26 Tank fueling at Ericeira



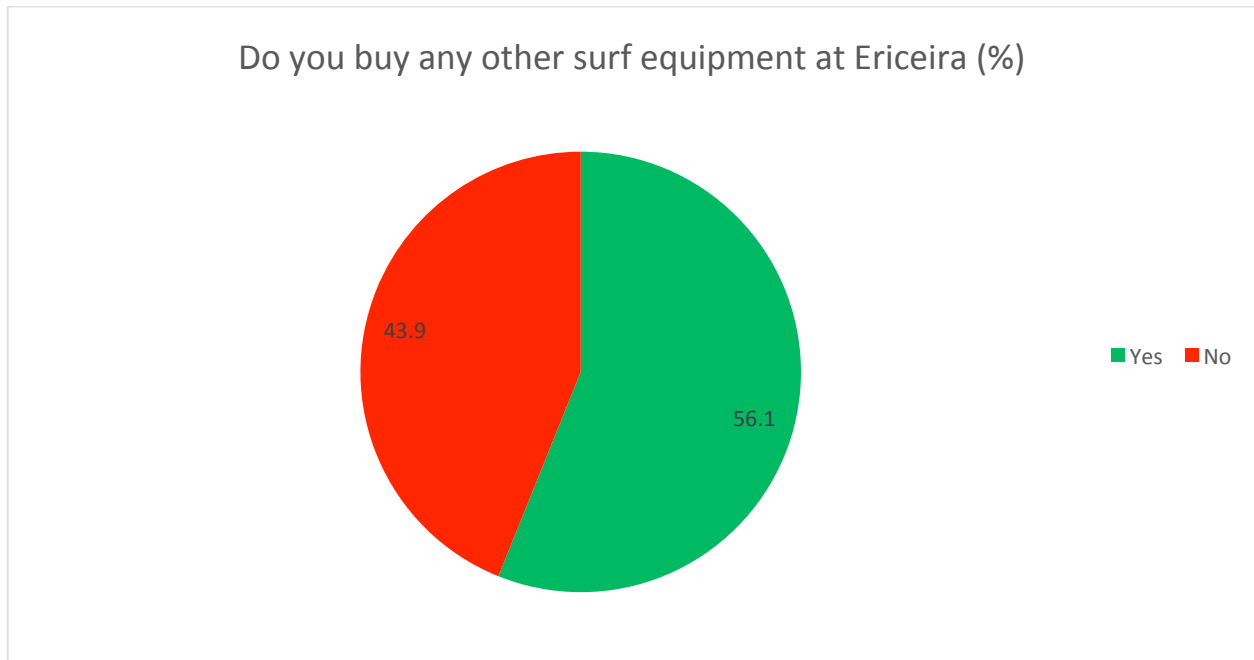
Graph 27 Learning surf with friends or in isolation



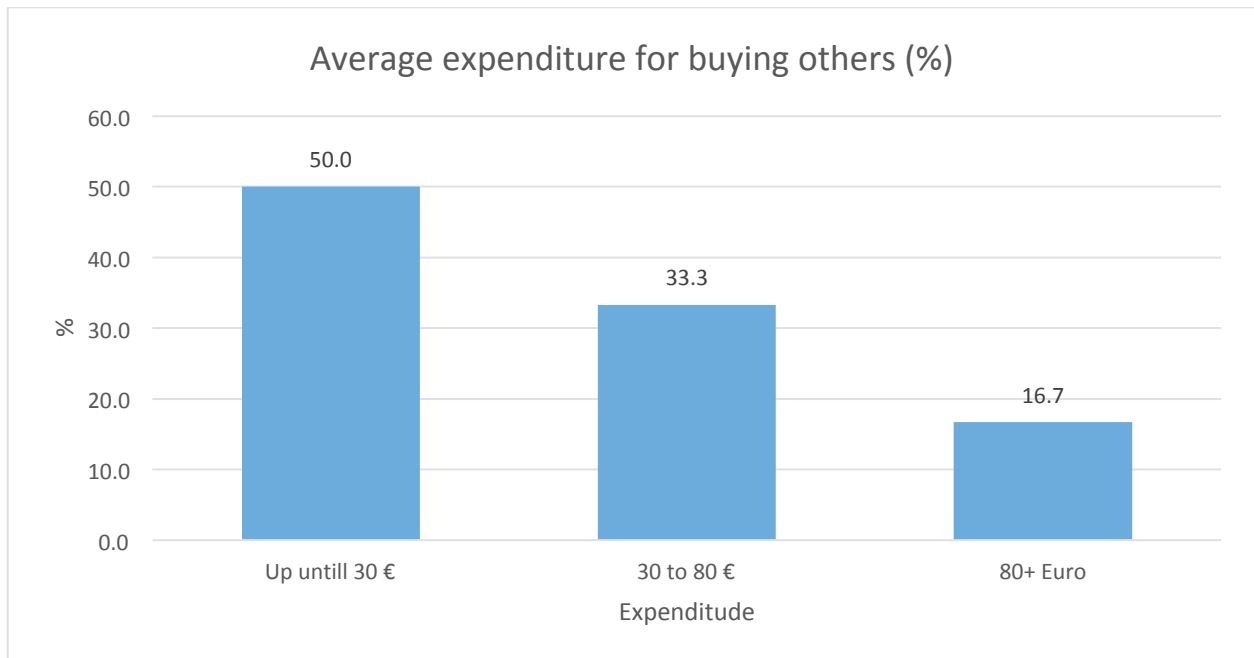
Graph 28 Average cost of surf lesson



Graph 29 Source of surf equipment



Graph 30 Purchase of other surf equipment in Ericeira



Graph 31 Average expenditure on surf equipment

**A3 SURVEY OF THE ERICEIRA BUSINESS OPERATORS**

**A31 INQUIRY FOR SURVEY OF ERICEIRA BUSINESS OPERATORS  
(original and translation into English)**



## O impacto do Surf no turismo em Portugal

Muito obrigado pela seu interesse em participar.

Está a contribuir para a validade estatística do meu estudo.

- Pretende receber o relatório final com as conclusões deste estudo?

- Sim
- Não

- Qual o endereço de email para onde pretende que venha a ser enviado?

- Área do negócio?

- Alojamento
- Escola de Surf
- Restauração
- Bares
- Cafés e pastelaria
- Comércio alimentar
- Outro. Qual

- Ano de abertura:

- Número de empregados Fixos:

Empregados fixos

- Número de empregados em época alta:

Empregados em época alta

- Como se comportaram as sua vendas nos últimos anos?

- Aumentaram muito (>20%)
- Aumentaram (de 0 a 20%)
- Estagnaram
- Diminuíram
- Não Sabe/Não Responde

A que se deve esta variação?

- Que impacto teve o Surf no seu negócio?

- Mais vendas
- Mais clientes
- Nenhum impacto

Como é que o Surf poderia ter um maior impacto no seu negócio?

**Survey addressed to business operators (translation)**

Which area does your business operate in?

- Accommodation
- Surf School
- Restaurant
- Bar
- Coffee/pastry shop
- Food trade
- Other. Which?

Year of opening:

Number of fixed employees

Number of employees during high season

How would you characterize the sales in the past years?

- Increased greatly (>20%)
- Increased (<20%)
- Remained the same
- Decreased
- Don't know/don't answer

Why was there such a change in sales?

Why did the sales change?

How would you explain that change?

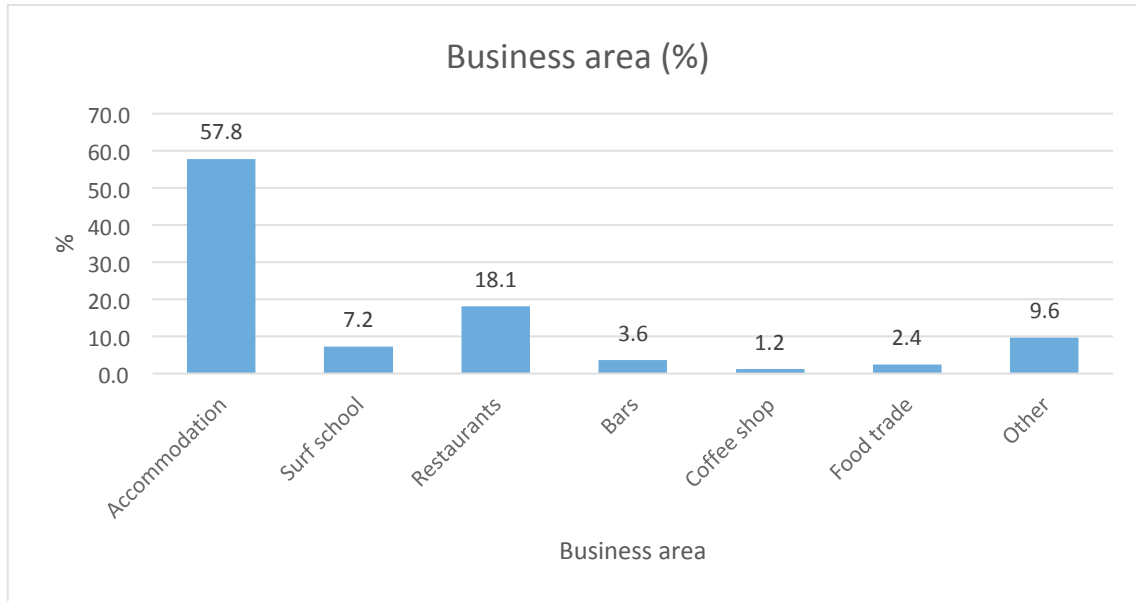
Which type of impact the surf in Ericeira had on your business?

- More sales
- More clients
- None

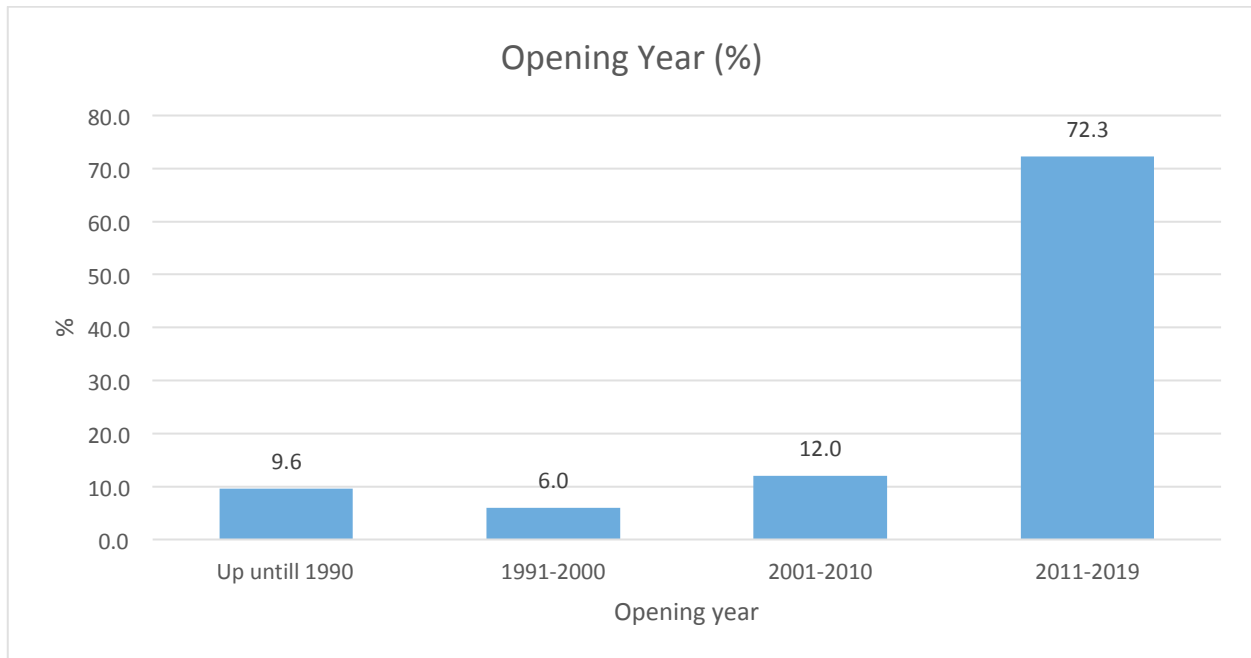
How could you use the surf in Ericeira in your benefit?

What could you do in your business to have a better benefit from the surf in Ericeira?

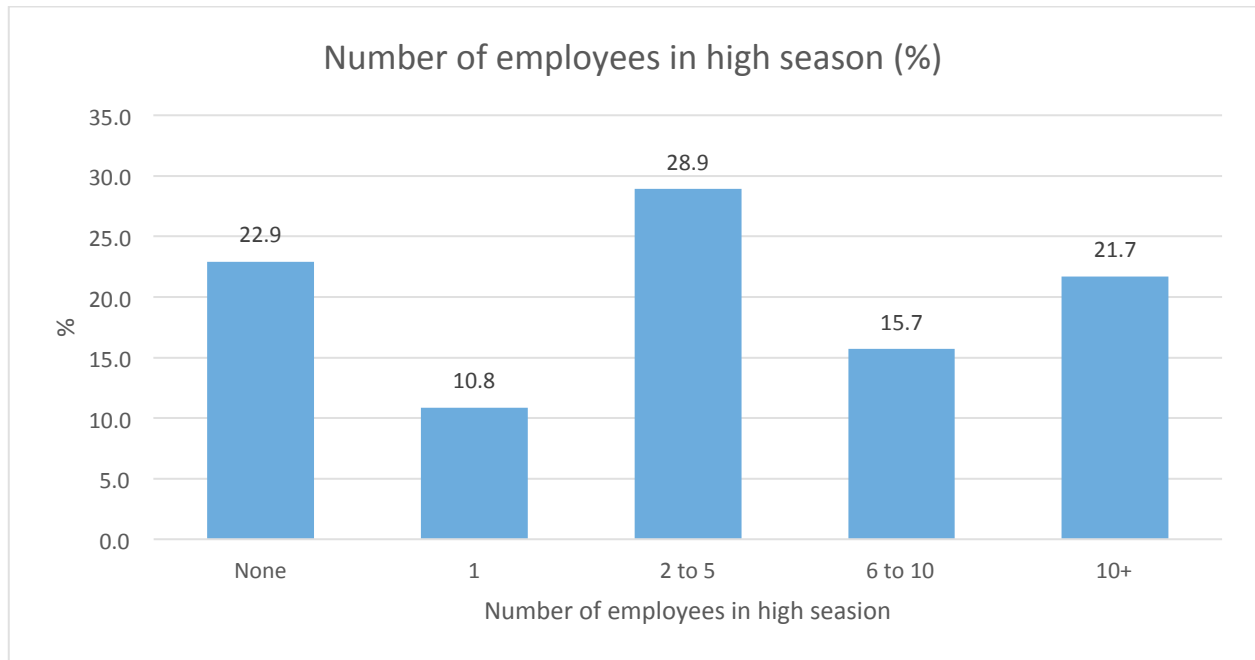
**A32 GRAPH RESULTS OF THE SURVEY ERICEIRA BUSINESS OPERATORS**



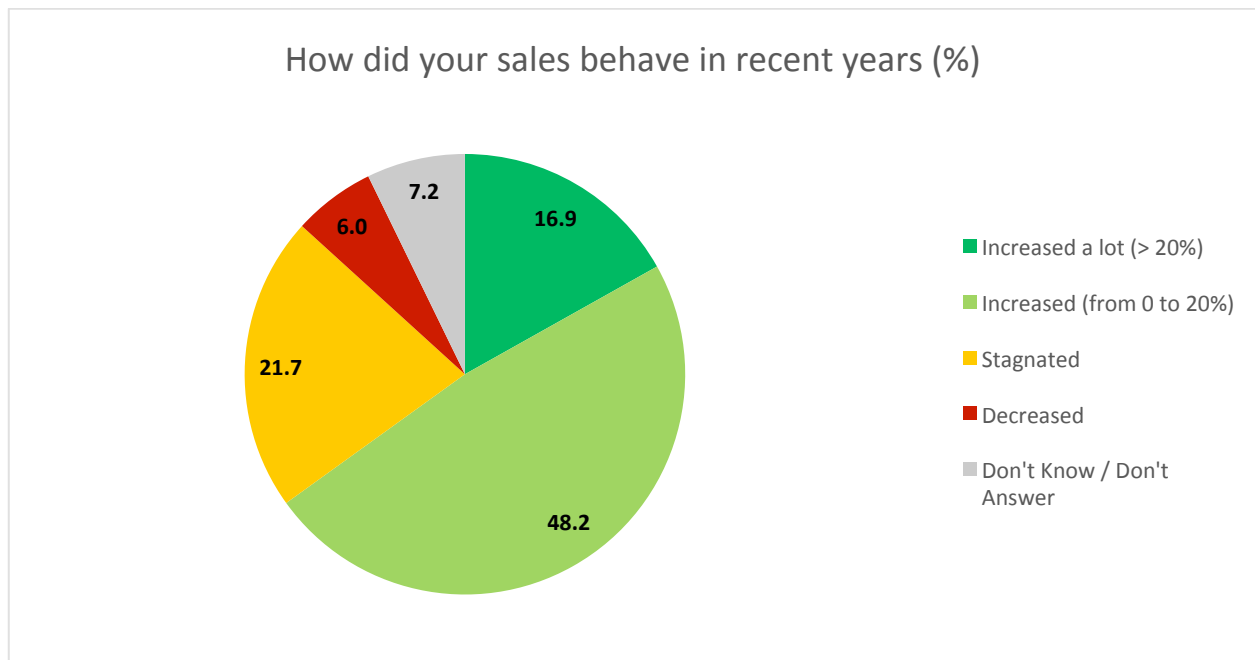
Graph 31 Business area



Graph 32 Year of establishment



Graph 33 Number of permanent employees during the high season



Graph 34 The sales trends in the recent past

**A4 SURVEY OF ERICEIRA USUAL TOURISTS**

**A41 INQUIRY FOR ERICEIRA USUAL TOURIST (original and translation into English)**

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• Que tipo de impacto considera que o surf teve na Ericeira como destino turístico?

---

Inquérito Turistas

 QuestionPro

---

• Considera que a indústria do surf:

- Terá contribuído para uma descaracterização da vida e hábitos da população local.
- Ou antes pelo contrário, existe hoje uma convivência saudável.

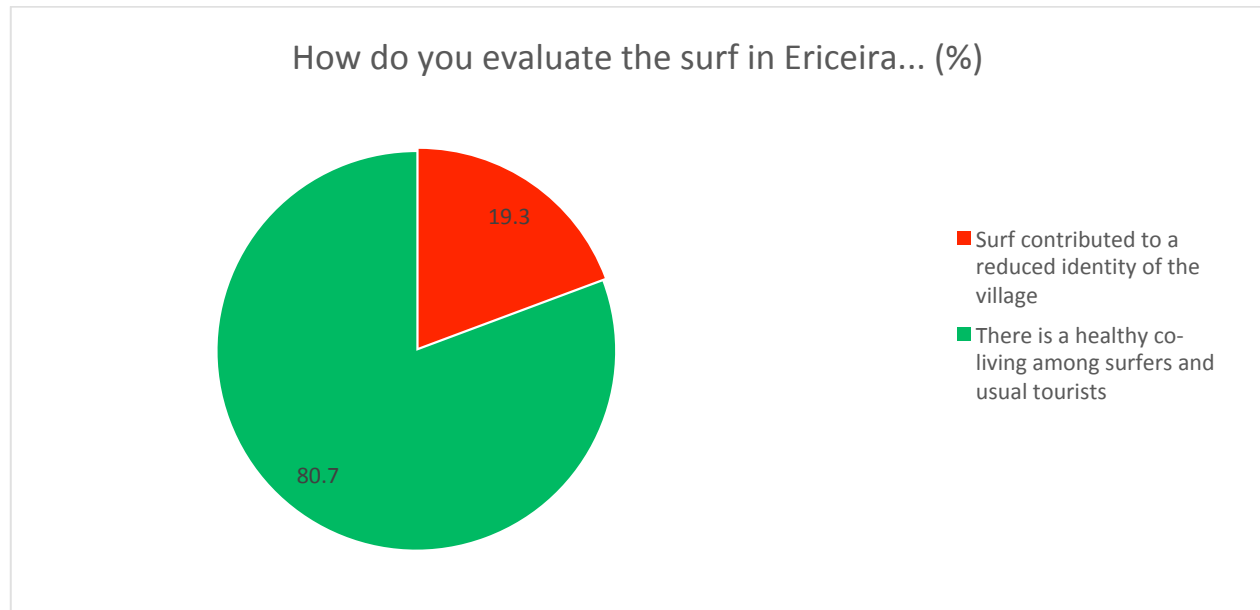
**Survey addressed to Tourists**

How you characterize the impact surfing had in Ericeira as a touristic destination?

What is your opinion on the surf industry in Ericeira?

- It may have contributed to a loss of local habit and culture.
- It has a healthy relationship with local habits and culture

## A42 GRAPH RESULTS OF THE SURVEY ERICEIRA USUAL TOURISTS



Graph 36 the perception of the usual summer tourists

## 5 AZUL MAG - INVITATION FOR PARTICIPATING IN THE SURVEY

A Ericeira constitui o *case study* (“caso de estudo”, em português, expressão que designa um método de abordagem de investigação científica) duma tese de mestrado em Gestão actualmente em desenvolvimento.

Salvador do Canto Moniz Martins, licenciado em Administração de Empresas pela Universidade Católica Portuguesa, encontra-se a preparar uma tese de mestrado em gestão no Instituto Universitário de Lisboa – ISCTE.

Tendo escolhido como tema ‘O impacto do Surf no turismo em Portugal’, Salvador Martins optou pela Ericeira como o *case study* para este seu projecto por diversas razões, algumas de ordem racional e outras mais pessoais e afectivas: além da Ericeira constituir uma Reserva Mundial de Surf (de acordo com Salvador será mesmo a primeira vila do mundo com esta classificação), a Ericeira é uma vila com poucas para a qual ainda não existe um *case study* realizado pela Save the Waves Coalition, entidade que organiza este galardão às candidaturas apresentadas), o investigador tem uma forte ligação à vila jagoza: este é meu

local onde se iniciou na prática do surf, além de constituir o destino de férias da sua família há mais de oitenta décadas.

“ *Salvador Martins apela à colaboração para levar o seu projecto a bom porto* ”

E é precisamente o impacto resultante do cruzamento entre estas duas realidades (as indústrias do surf e do turismo) nos destinos – nomeadamente ao nível da convivência e integração Vs descaracterização da vida locais – que a tese se propõe avaliar.

Salvador Martins, para quem “este trabalho apresenta a ligação histórica, cultural e económica de Portugal ao Mar”, neste momento apela à colaboração da comunidade para levar o seu projecto a bom porto, construindo um caso de estudo: solicita que todos os interessados participem activamente na sua investigação respondendo ao inquérito.

Todas as informações recolhidas são confidenciais e destinam-se apenas a fins académicos. Não existindo dúvidas mais certas ou erradas, Salvador Martins solicita apenas que os participantes respondam da forma mais veraz possível.

Para colaborar basta responder a um par de perguntas do questionário dirigido à comunidade em geral e encontra-se acessível através deste link ([https://www.questionpro.com/a/TakeSurvey?tt=0msevODXCWw%3D&fbclid=IwAR37HKrj7MCf1JFZGxGKI4roidB\\_zHzh6PrVjf4PXow-raPp0rZS\\_UpAx4](https://www.questionpro.com/a/TakeSurvey?tt=0msevODXCWw%3D&fbclid=IwAR37HKrj7MCf1JFZGxGKI4roidB_zHzh6PrVjf4PXow-raPp0rZS_UpAx4)).

Se for lojista ou empresário na Ericeira, poderá também responder a este questionário (<https://www.questionpro.com/a/TakeSurvey?tt=1/4dk9vndK8%3D&fbclid=IwAR0IYOGSE6S5ZDFZ1t2F9HKJFIuDC1kgjBV109qvy8K-8N5uzqVKtM>), existindo ainda um terceiro modelo destinado apenas a surfistas e que se encontra disponível aqui ([https://www.questionpro.com/a/TakeSurvey?tt=kEEP2OTa17U%3D&fbclid=IwAR1YN8ODi\\_ud5lYavck0h6OPA4IBLVMuOrMzq2OTZcHS-R01cT\\_ifK-x6Gg](https://www.questionpro.com/a/TakeSurvey?tt=kEEP2OTa17U%3D&fbclid=IwAR1YN8ODi_ud5lYavck0h6OPA4IBLVMuOrMzq2OTZcHS-R01cT_ifK-x6Gg)).



**APPENDIX B**  
**PEDAGOGICAL NOTE**

## **B1 VIDEO CAMPAIGNS AND PROMOTIONS**

### **PORTUGAL**

Turismo de Portugal Launch campaign “Can’t Skip Portugal”

<https://youtu.be/EzCfYce-m9k>

Turismo de Portugal can’t skip Us, Can’t Skip Portugal (sneak peek)

<https://youtu.be/CwqLQcZYtEo>

Turismo de Portugal Sketch Tour Portugal – Portuguese Waves

<https://youtu.be/FyT9A1OBB-8>

<https://youtu.be/E7sPgzPP4nI> Portuguese waves (sneak peak)

Portuguese Waves Series

<https://www.portuguesewaves.com/post-qs-session-pedra-branca-goes-off/>

<https://www.instagram.com/portuguesewavesseries/>

Turismo Portugal Times Square - BIGGEST WAVE EVER

[https://m.youtube.com/watch?v=n13y\\_qJ6ZAs&time\\_continue=6&eac=ANyPxKpj6ZdkSO4gFC-r4iarY733sPS3XdyHViBwmPt2jHHyUoYnlJn-zp5jt0B-UsY-t2pbt-Wb7rTCyobTj8KdLc-GNz2O7Q](https://m.youtube.com/watch?v=n13y_qJ6ZAs&time_continue=6&eac=ANyPxKpj6ZdkSO4gFC-r4iarY733sPS3XdyHViBwmPt2jHHyUoYnlJn-zp5jt0B-UsY-t2pbt-Wb7rTCyobTj8KdLc-GNz2O7Q)

Turismo de Portugal A Taste of Portugal | A Land of Beaches

[https://youtu.be/WDWeqF\\_Glvo?list=PLuMAo-oYI9ziTatAYYkpuj6-UwetzLyPY](https://youtu.be/WDWeqF_Glvo?list=PLuMAo-oYI9ziTatAYYkpuj6-UwetzLyPY)

Turismo de Portugal Tourism Training Talent | Escolas do Turismo de Portugal | 2018

<https://youtu.be/CmEzV0bJrBk>

### **ERICEIRA**

Ericeira World Surf Reserve Dedication Ceremony Oct 14 2011

<https://www.youtube.com/watch?v=EF2vLeOmfNI&feature=youtu.be>

The Impact of Surfing on Tourism in Portugal

Surf – Ericeira World Surfing Reserve, Interpretation Centre

[https://www.youtube.com/watch?time\\_continue=5&v=VxDA001qZ\\_k](https://www.youtube.com/watch?time_continue=5&v=VxDA001qZ_k)

Saca – O Filme de Tiago Pires | The Life of Tiago Pires

<https://www.youtube.com/watch?v=rvI89NOO8U4>

Portuguese Waves Series

<https://www.portuguesewaves.com/mcnamara-surf-trip-ep-2-lisbon/>

Never Flat Land – Ericeira

<https://youtu.be/TRPEfy5QzNs>

Surfing Praia Ribeira d'Ilhas - Surf in Ericeira Portugal - World Surfing Reserve

<https://youtu.be/kY6jskCxzK8>

Surfing Ericeira: Ribeira d'Ilhas, Coxos, Cave, Pedra Branca, Algodio | with aerial drone shots

<https://youtu.be/5ZwRbIdB8Fo>

Live in Ericeira

<https://www.mybesthotel.eu/o-que-visitar/ericeira-reserva-mundial-de-surf/>

Ericeira, Portugal (DJ Phantom 3 Professional -4k)

<https://youtu.be/d00JGyq2h7k>

58 Surf Flagship Store - Ericeira

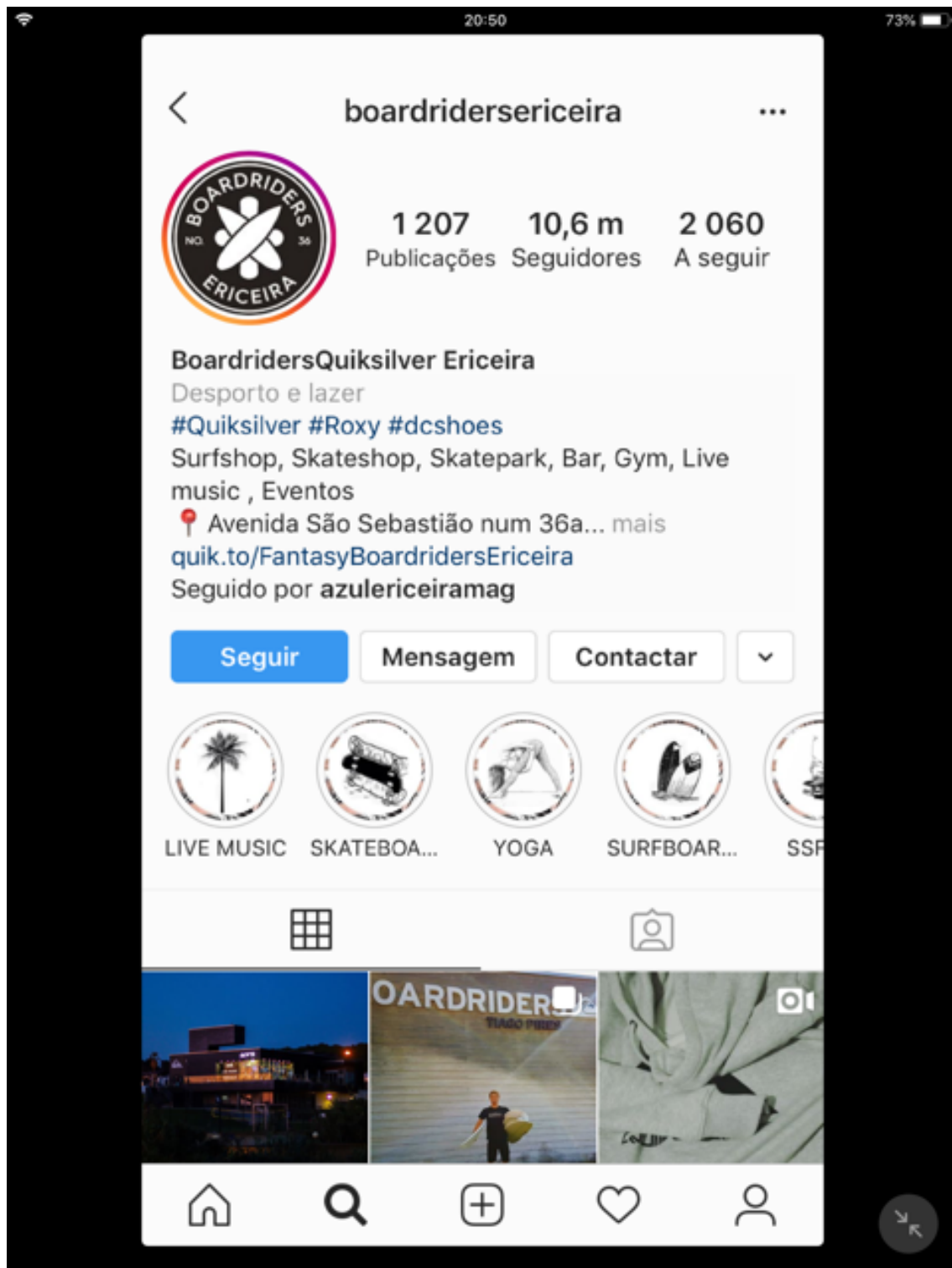
[https://youtu.be/58YsqhBk1\\_Q](https://youtu.be/58YsqhBk1_Q)

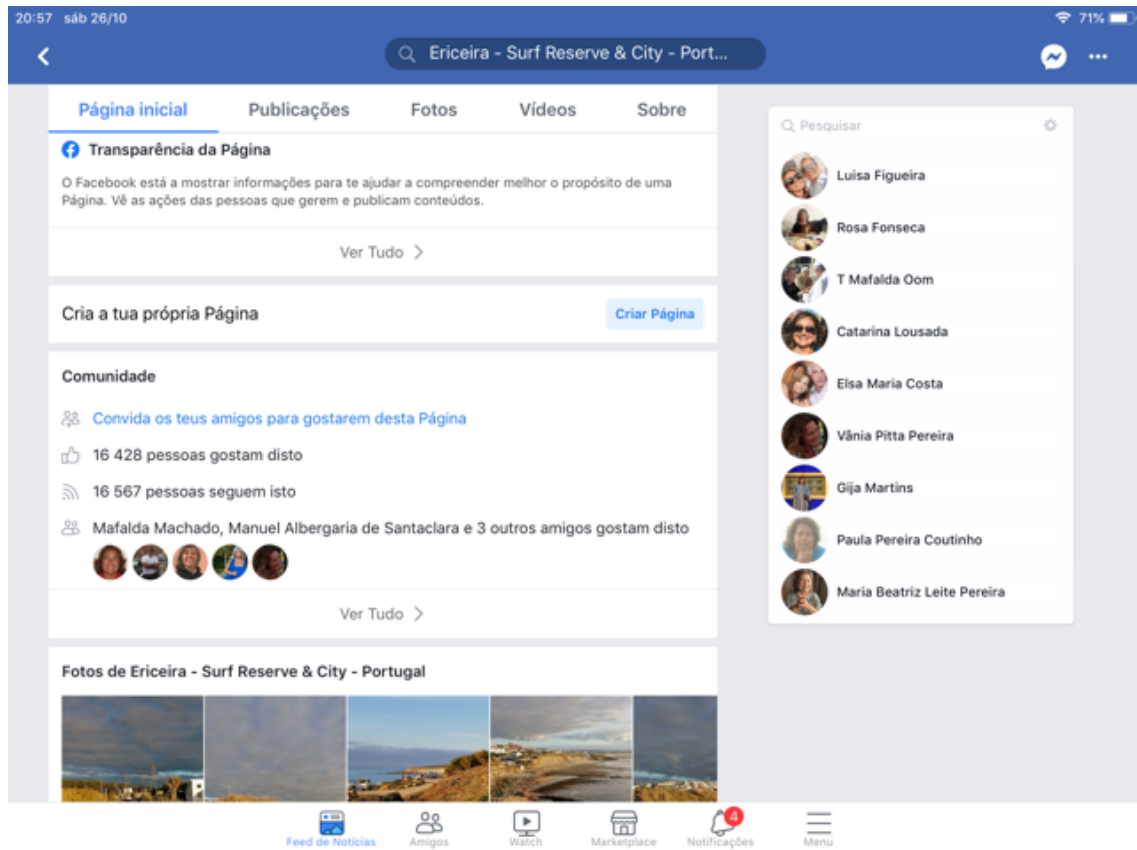
Mafra/ Ericeira

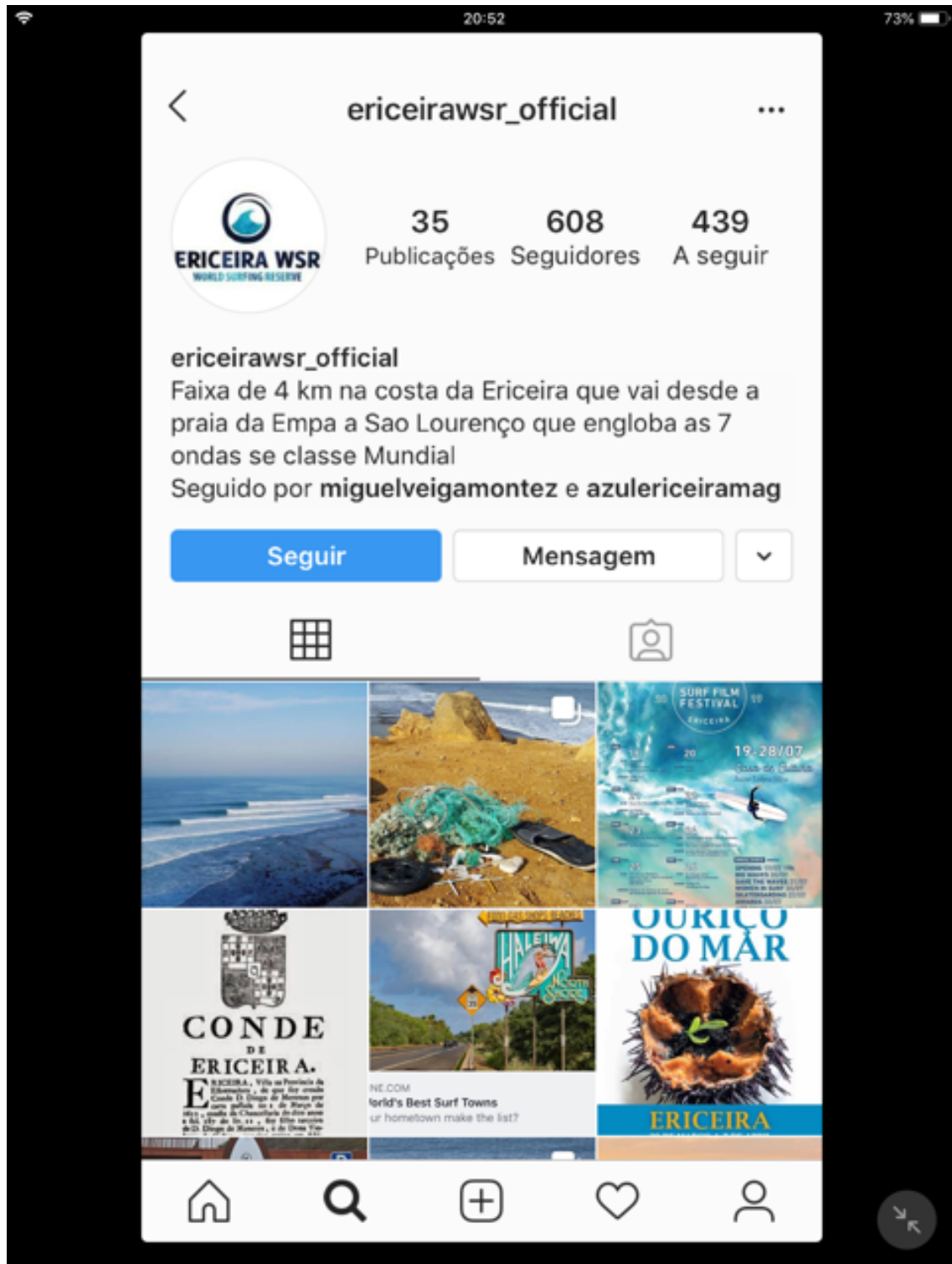
<https://youtu.be/6F1BvhBiaEI>

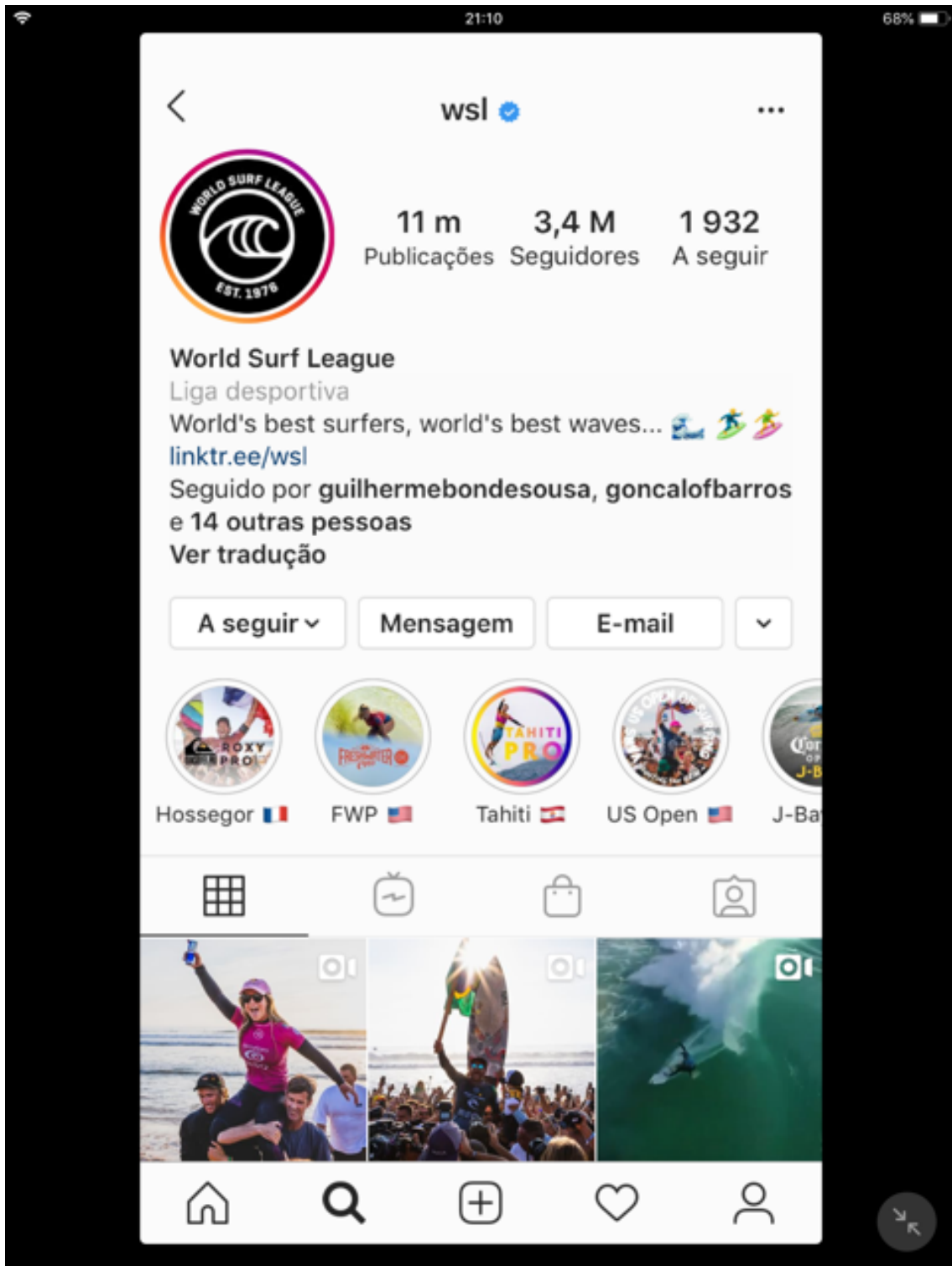
B2 INSTRAGRAM AND FACEBOOK VIEWERS AND FOLLOWERS



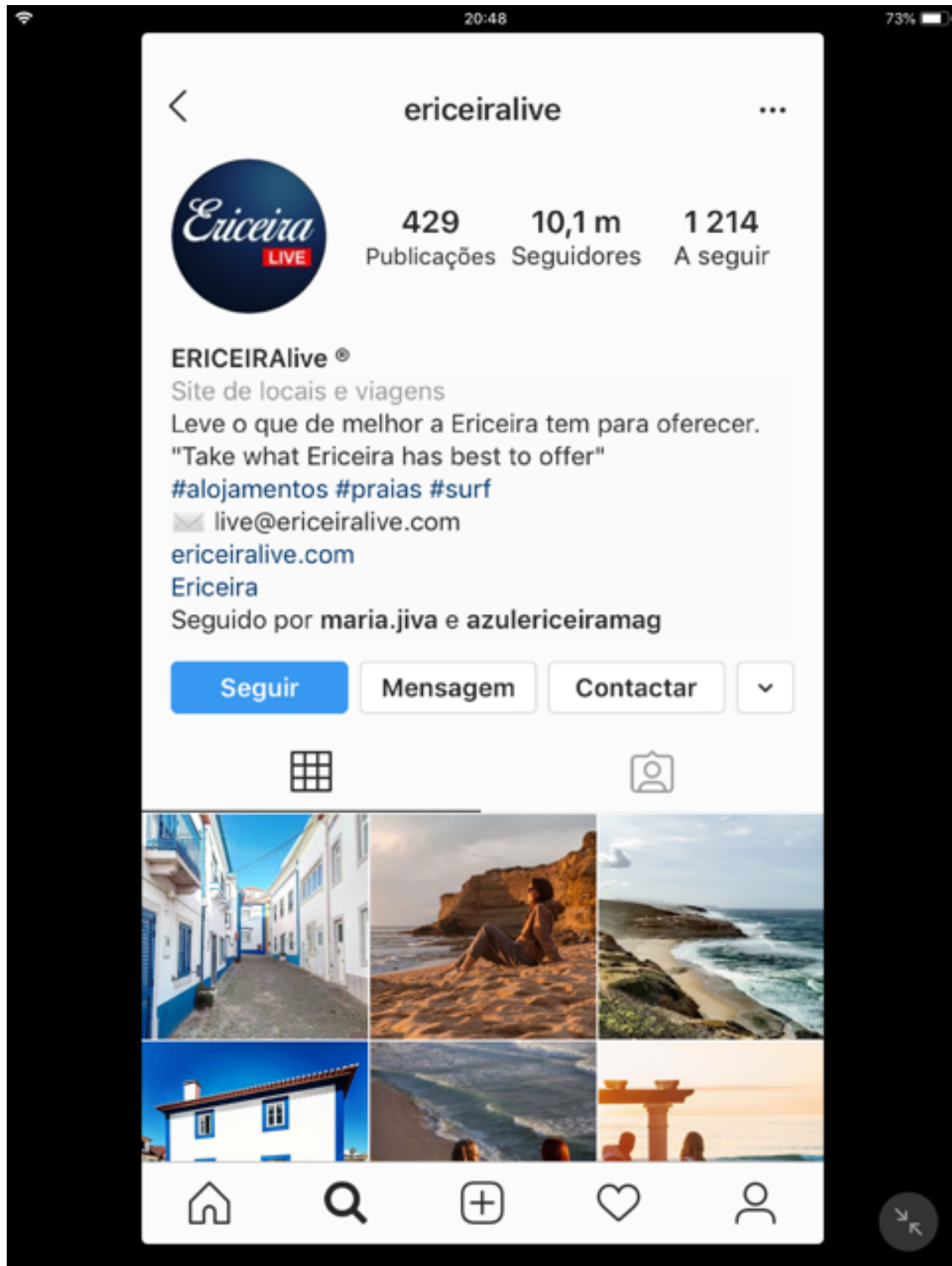


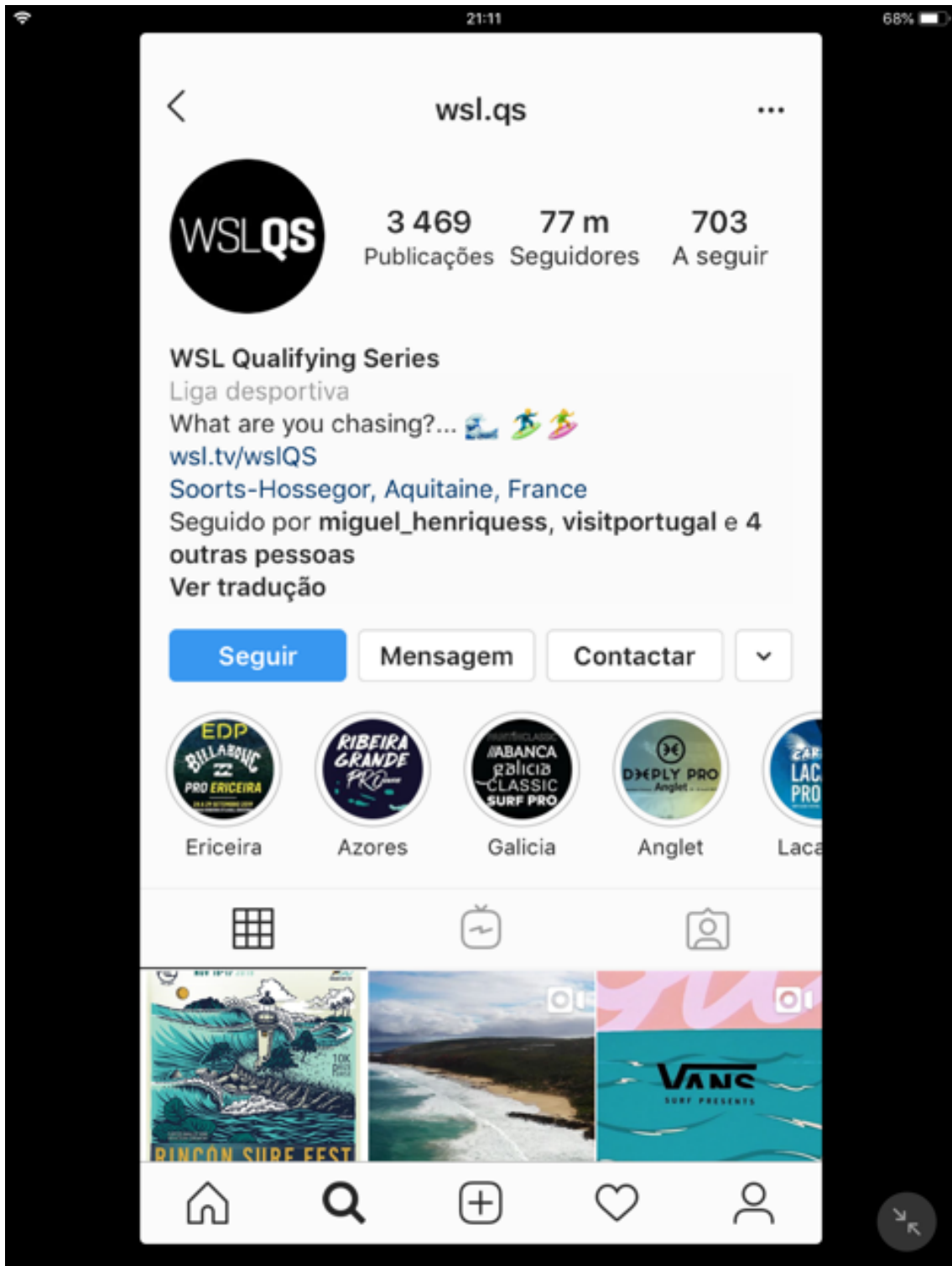


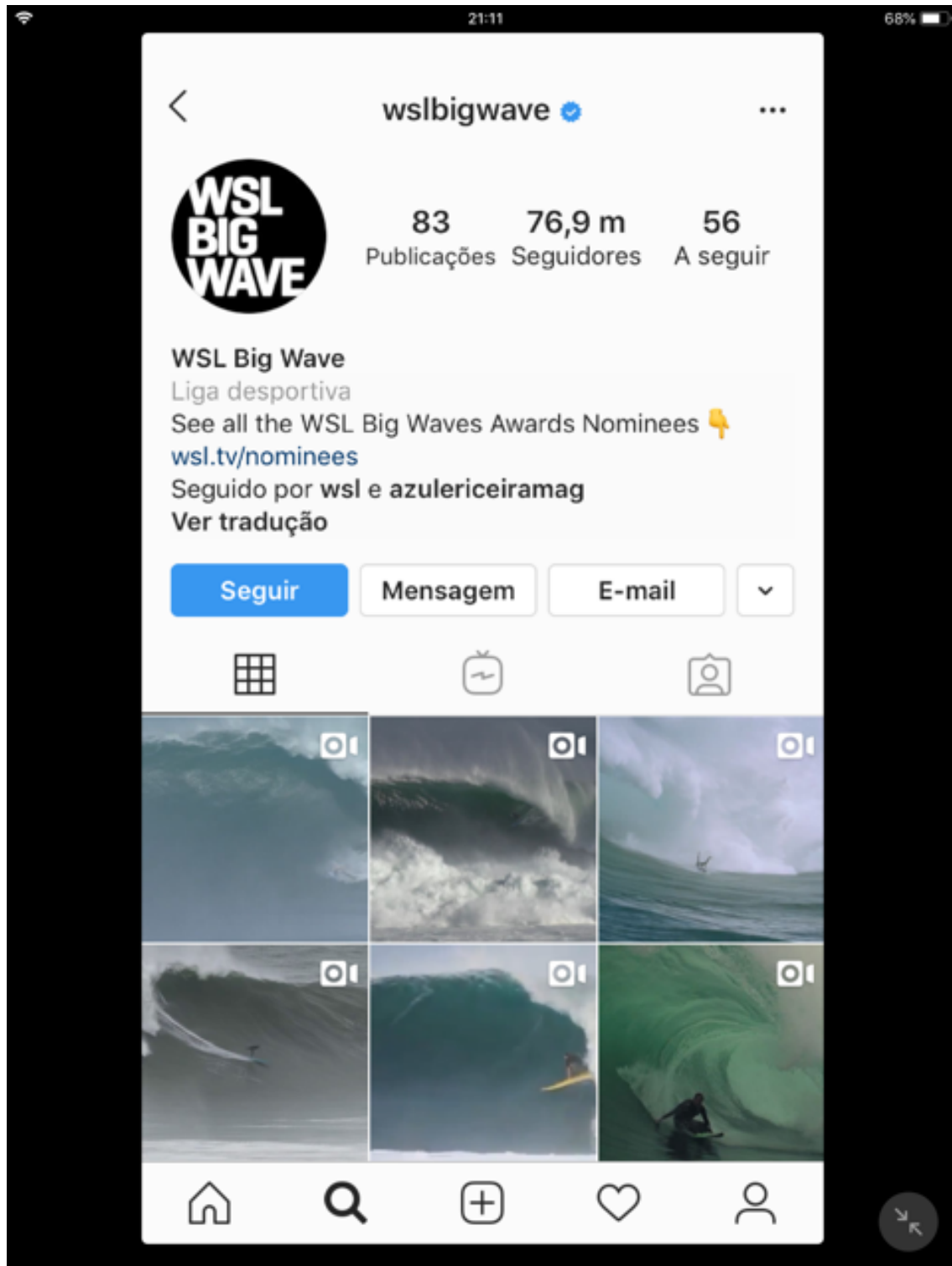


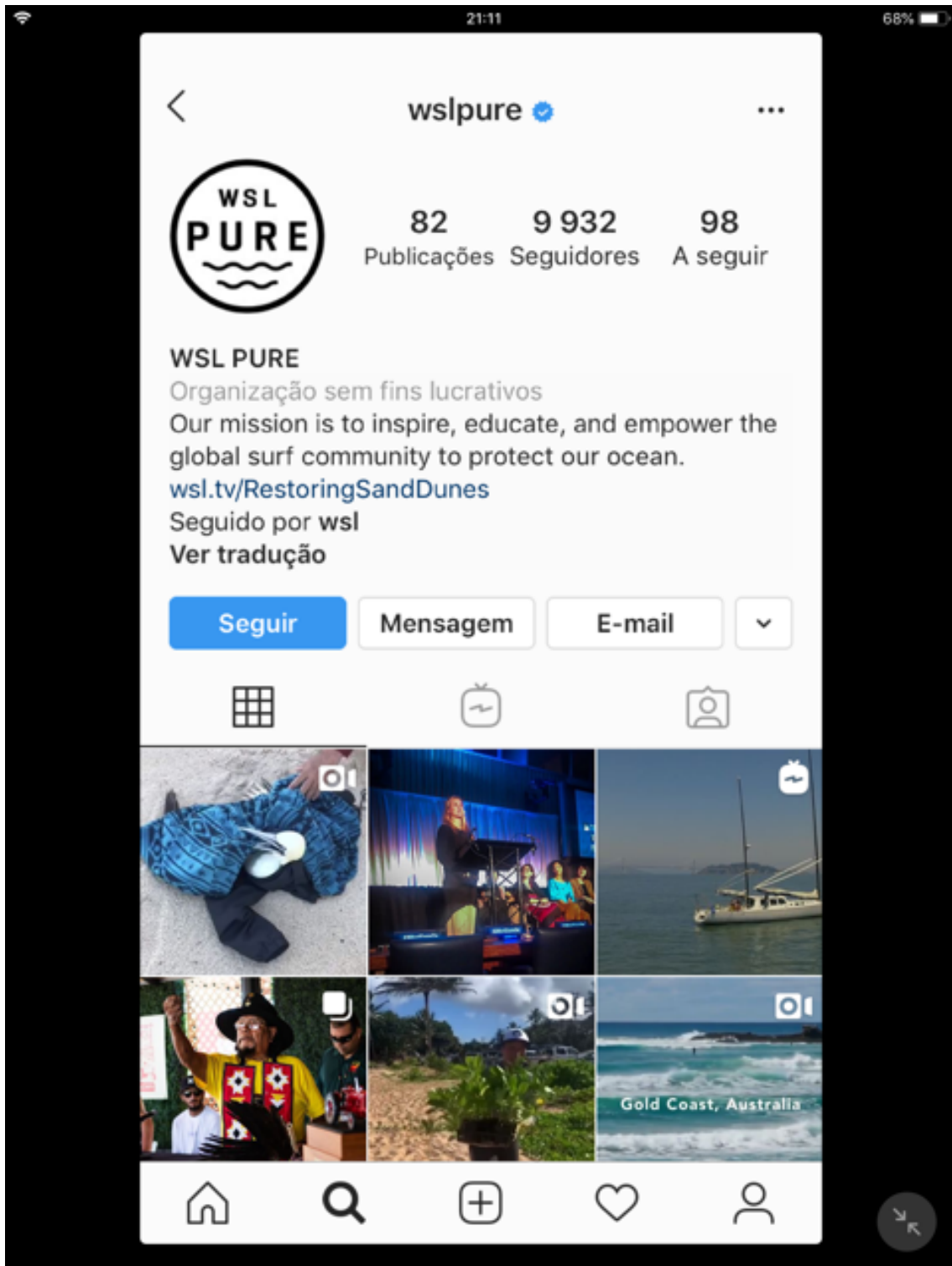


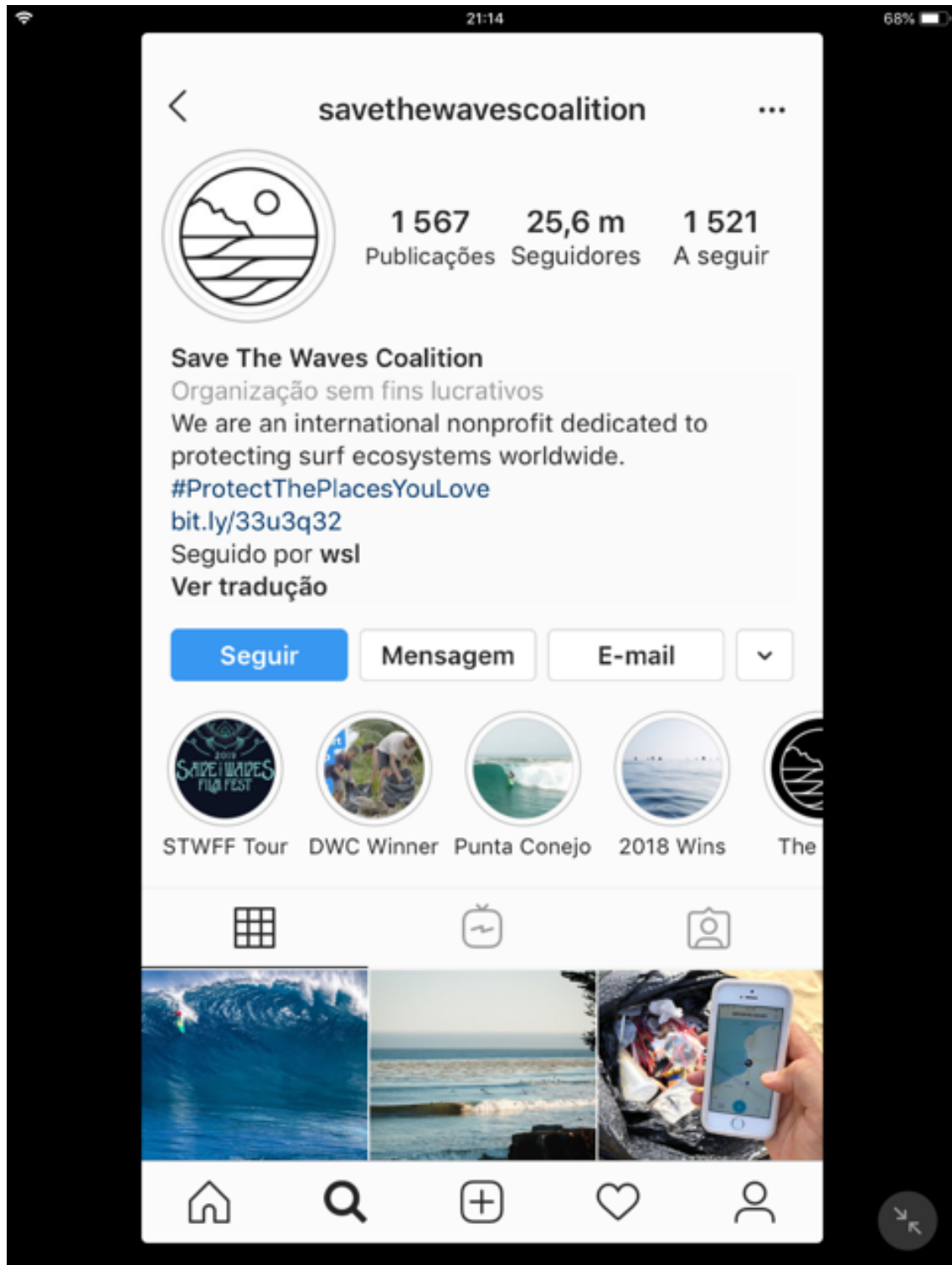








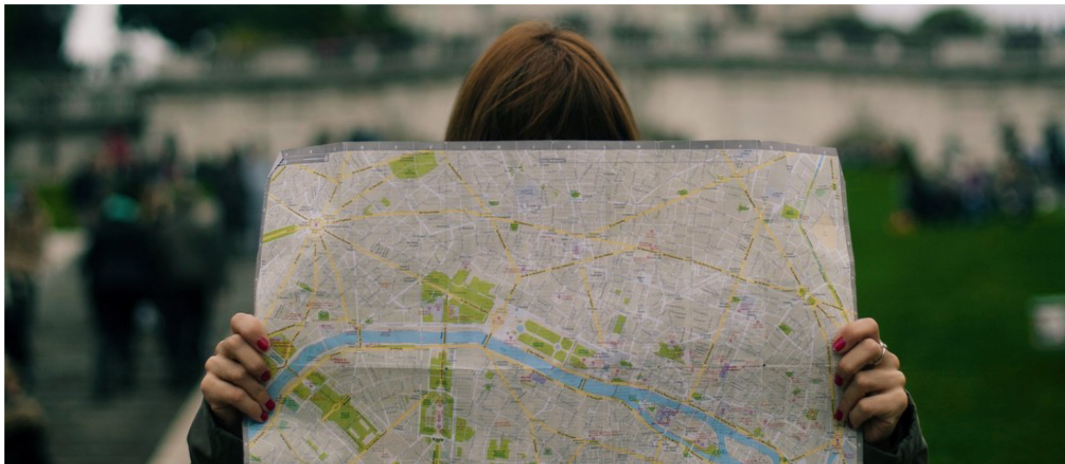




**B3**      **REPORT WEF – A roadmap for destination management in the digital economy**



## A roadmap for destination management in the digital economy



Where should global tourist destinations go from here?

Image: David Tapia San Martin/Unsplash

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In the digital economy, tourist destinations face management challenges like never before.

As tourism has become a truly global activity, destinations compete with other destinations worldwide. New technologies have accelerated tourism growth, bringing supply and demand closer, facilitating travel and booking and transforming marketing operations and business models. In the last 20 years, travel aggregators, online travel agencies, social media applications, metasearch engines and a host of new players have significantly transformed the tourism business and influenced demand behaviour.

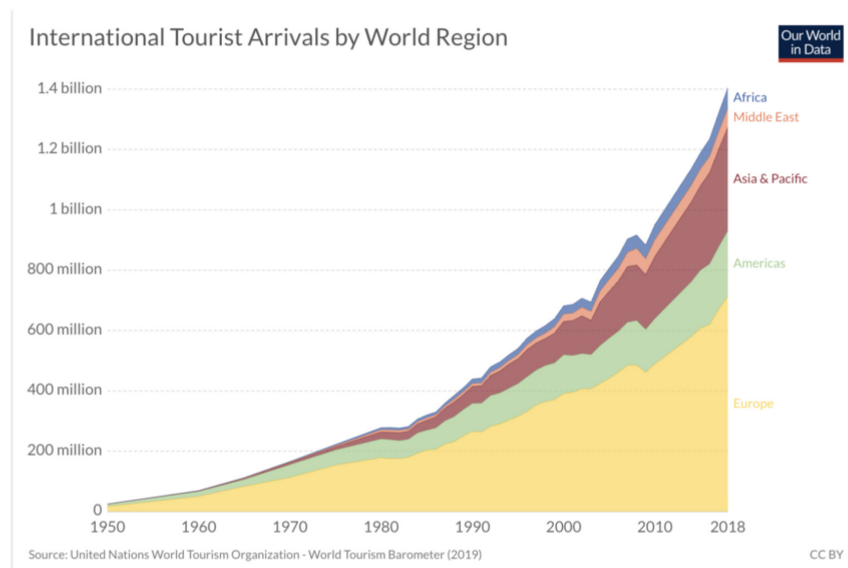
The digital economy has led to new challenges for destination management—but destinations can overcome them and indeed thrive by harnessing the power of data.



## The challenges of the digital economy for destination management

In the digital economy, uncertainty is guaranteed in the decision-making process of governments, destinations and businesses: changes in business models, the emergence of new disruptive technologies, changes in society, the emergence of insecurity phenomena in tourist areas, a greater frequency of natural disasters.

On the other hand, everything happens very fast. The travel-planning process has been significantly shortened and last-minute bookings are more common, as the consumer increasingly has almost real-time information influencing buying decisions, such as hotel and flight availability and price, weather conditions and user-generated content about destinations.



Tourist arrivals worldwide have risen 56-fold since 1950

Image: UN World Tourism Organization / Our World in Data

Indeed, these technological developments have transferred power to the consumer in terms of decision making, forcing tourism stakeholders to adapt their strategies.

This transition has been a challenge for tourist destinations, and the fragmentation of the tourist industry makes it more difficult. More advanced players and small businesses coexist in the digital economy; for the latter, digitalization is a distant ambition, making them—and the destination—less competitive in the medium term.

Traditionally marketing-oriented, destination-management organizations are also evolving into more management-focused organizations. They are redefining their organizational structures, incorporating innovation and product development into their core business and investing significantly in knowledge production and dissemination to support this change.

For years, destination management used a limited number of indicators, available with some timing delay and limited granularity, complemented by demand surveys and generic research. This worked for market-oriented management. However, new developments and the aforementioned challenges completely change decision-making data needs, and even the role of the destination-management organizations. As in other industries, data will be the key resource for future tourism destination management.

Reports from [WTTC](#), [OECD](#) and [UNWTO](#) clearly identify the benefits of big data, Internet of Things (IoT), machine learning, artificial intelligence and blockchain for better management of the sector, allowing continuous monitoring of performance, marketing campaign optimization, benchmarking with competitors and monitoring flows within the destination. Destination managers also have at their disposal data from social networks, mobile devices, credit cards, flights and airports, among others.

## **Barriers to implementing data-driven destination management**

Given this large amount of data, the question is how to mobilize it and build a knowledge-based strategy for destination management.

The answer is far from easy. In fact, we have moved from a restricted number of data sources, provided by traditional institutions, to a constellation of new sources, complex by nature and with their own nomenclature, in order to respond to a completely new agenda.

There are several barriers to effective use of these new data sources, big data specifically:

- Data access usually requires a strong investment in data acquisition, storage and software that enables analysis of large volumes of data
- Data volume and complexity implies the need for analytical skills, which, today, are scarce and expensive, generally not available in destination management organizations
- Lack of innovation-oriented culture with the ability to maximize the use of data to turn insights into competitive advantages
- Ability to promote the transfer of knowledge to the firm level, inducing innovation in the development of products and services and in the generation of new business models



- Poor levels of vertical cooperation between national and local level in terms of destination management

The expertise required to overcome each of these barriers is spread across different organizations (data providers, universities, IT companies, accelerators and governments) and is difficult to concentrate in one single organization.

Overcoming these barriers will require a network approach or, in other words, setting up a knowledge ecosystem with increasing interdependencies among all stakeholders.

## **Ecosystems as a potential driver of change**

Managing a complex problem requires a solution that, while equally complex, can produce results seen as win-win solutions for all partners.

As with any ecosystem, a clear and shared strategy is key to aligning partners and enabling a common roadmap.

Leadership is also essential. In the case of tourism, destination-management organizations, due to their role, their knowledge of the industry and its specificities and the data to which they have access, must assume the leadership role and serve as a platform for knowledge-sharing by other stakeholders.

While there is not exactly a template, we can identify key elements of the process:

First, organizations must upgrade their knowledge base by incorporating new data sources.

Next, organizations should promote the development of analytical tools to transform this data into information ready for decision-makers. This requires them to build teams of analysts who can perform these tasks. In this case, to solve the skills issue, partnerships with universities are good ways to test new analytics solutions or the feasibility of using new data sources. An example is the [project developed by Turismo de Portugal, NOVA SBE university and telecom company NOS](#) to test the feasibility of using mobile data in the management of tourist destinations, allowing managers, data analysts and data providers to join.

Information sharing is another challenge. The development of data portals has been one solution. The European Commission's [Virtual Tourism Observatory](#), [TravelBI by Turismo de Portugal](#) (see below) or the [Buenos Aires Tourism Observatory](#) are examples of best practices in terms of data portals that allow users to consult and use data about the tourism sector.



TravelBI's data portal

Image: TravelBI by Turismo de Portugal

A final challenge is applying knowledge to new business development. This challenge has driven the emergence of [open data portals](#) making data open and accessible to developers and academics, and used in open innovation programs to develop solutions for business and destination issues.

Only those destinations and organizations that can adapt to the digital economy and harness data will overcome the challenges of this new world, and succeed.

*For more insights and analysis on how 140 countries performed, read the World Economic Forum's 2019 Travel and Tourism Competitiveness report [here](#).*

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