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2020-12-17

Deposited version:

Accepted Version

Peer-review status of attached file:

Peer-reviewed

Citation for published item:

Machado, V., Carrasco, P., Contreiras, J., Duarte, A. P. & Gouveia, D. (2018). Governing locally for sustainability: public and private organizations' perspective in surf tourism at Aljezur, Costa Vicentina, Portugal. Tourism Planning and Development. 15 (6), 692-704

Further information on publisher's website:

10.1080/21568316.2017.1415958

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Virgílio Machado, Paulo Carrasco, Joaquim Pinto Contreiras, Ana Patrícia Duarte & Danielle Gouveia (2018) Governing Locally for Sustainability: Public and Private Organizations' Perspective in Surf Tourism at Aljezur, Costa Vicentina, Portugal, Tourism Planning & Development, 15:6, 692-704, DOI: 10.1080/21568316.2017.1415958

Post-print version

Governing locally for sustainability: Public and private organizations' perspective in surf tourism at Aljezur, Costa Vicentina, Portugal

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Acknowledgement: The study here reported is part of a research project on surfing tourism in Aljezur supported by the Aljezur Municipality.

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This study explores how a rural municipality of low population density and strong tourism intensity for the practice of recreational activities can exert a sustainable collective action in the policies and strategies of planning and development of local tourism. The study focuses on the case study of the municipality of Aljezur, in Portugal, and is applied to a dominant tourism-recreational activity, surfing. Based on a survey of relevant stakeholders, namely private and public organizations, it was possible to obtain indicators of local environmental, economic and social convergence. These allowed elaborating a proposal for a municipal sustainable management charter of the surfing tourism in the region. The conception of this charter and the consequent strategies moves the management of local tourism destinations to higher levels of institutional sustainability.

Keywords: sustainable tourism development; sustainable tourism planning; surfing tourism; local governance; stakeholders; municipal charter for sustainable management.

Introduction

Surfing tourism has increasingly risen in the last decades (Buckley, 2002; Gonçalves, Mascarenhas, Sandro, & Pereira, 2013; Ponting & O'Brien, 2013) and is viewed as a potential source of development by communities and destinations around the globe (Martin & Assenov, 2014; Towner & Milne, 2017). However, the growth of commercial surfing activities when unregulated can have detrimental social and environmental impacts for communities, together with minor economic gains (Buckley, 2002; Ponting & O'Brien, 2013). A more strategic, long-term and formalized approach to surf tourism planning and development is fundamental to prevent these unfavourable influences and maximize the creation of value for local communities (Buckley, 2002; Ponting & O'Brien, 2013). Local governmental authorities have a key-role in the development and enforcement of such a plan. The engagement of the local community and other relevant stakeholders (Freeman, 1984) in the territory during the process is determinant for its success. Literature has shown that planning is best facilitated when their positions on the matter are considered by the local governmental authorities (Ciles, 2009; Hampton, 2005; Hartmann & Kwauk, 2011; Towner & Milne, 2017).

The present study explores how two of these stakeholder groups perceive the sustainability of surfing tourism in a Portuguese low population density municipality named Aljezur. More exactly, it characterizes the perceptions of two stakeholders with a clear influence on the development of the supply (i.e., surf schools operating in the territory) and its institutional and legal framework (i.e., public entities with competence in the coastal area) regarding the social, environmental, and economic impacts of surfing tourism in the region and evaluates the degree of convergence between those perceptions. As with many other Portuguese coastal regions, the municipality of Aljezur observed a steady increase of surfing tourists in the last decade (Bicudo & Horta, 2009; Leal & Cipriano, 2012; Reis, 2012). The region is relatively remote, semi-virgin and has excellent conditions for water sports. Surf is acknowledged as a tourism product that can contribute substantially to local economic development. Nevertheless, local leaders are aware of the diverse impacts that such movement can bring to the local community, and of the necessity of managing it in a sustainable way, namely through "soft power" instruments (Nye, 2010). This management poses particular challenges because the territory is fully located in a natural park and, consequently, several legal frameworks regulate the land use. The opinions of these stakeholders can be an important insight for the development of an efficient surfing tourism management plan. At the same time, comprehending and contemplating their opinions in local governmental initiatives, such as the development of charters of sustainable management, contributes positively in engaging them as full partners in the management process. In the following pages, a review of relevant literature is presented. Then, the methodological approach to the case study is described, including the context, sample, instrument and procedures. Next, the results are presented. Finally, some conclusions and implications are discussed.

Literature Review

Tourism is a dynamic sector with constant changes. In the last decades, the concept of holidays just to relax and rest has changed. Today, people are looking increasingly for authentic travel experiences that can provide excitement and adventure. This is largely because today's societies have an increased interest in the environment as well as in the aspiration for a healthy lifestyle (World Tourism Organization [UNWTO], 2012).

The surfers' lifestyle is part of the aforementioned context, stimulating and influencing, mainly through the media, people's imaginations. Surfing is a multifaceted activity that reaches diverse audiences with different needs and aims. A convergent characteristic of these practitioners is the search for virgin or semi-virgin, exotic and uncrowded sites for surfing where they can develop the full potential of the activity (Buckley, 2002; Reynolds & Hritz, 2012). Several researchers highlight the multimillion-dollar nature of surfing activities (e.g., Barbieri & Sotomayor, 2013; Wagner, Nelsen, & Walker, 2011) with significant economic impacts and continuous expansion (Martin & Assenov, 2014). In fact, in the last decades, several less developed regions have grown rapidly due to the intensification of surfing tourism. Despite the economic benefits observed in those regions, diverse unfavorable environmental (e.g., pollution, natural resources damage) and socio-cultural consequences (e.g., crowding, increase of social problems such as drugs, alcohol and prostitution, loss of cultural identity) of tourists' activities put the territories under increasing pressure (Ponting, McDonald, & Wearing, 2005; Towner & Milne, 2017). For this reason, surfing has been getting more and more attention from scholars in order to better understand and manage surfing sites. The sustainability of surfing tourism has been conceptualized at an international level (Martin & Assenov, 2014), with the presentation of environmental, economic, social and institutional indicators that are uniformly applicable in tourist

destinations. These aim at a systematic framework of qualitative and quantitative evaluation criteria favorable to the surfing activity in tourist destinations in a perspective of global sustainability. Academic research on surfing has predominantly focused countries in South-East Asia and the Pacific (e.g., Buckley, 2002; Martin & Assenov, 2014; Towner & Milne, 2017), where the most renowned sites for surfing are located. Studies conducted on European countries, such as the present one, are still scarce. More investigation is need to better understand how surfing tourism can be managed locally to ensure sustainable development to destinations.

Sustainable Surfing Tourism Management

Beni (1998) states that "the word sustainability aims to reflect a policy and strategy of continuous economic and social development, without detriment to the environment and natural resources, whose quality depends on the continuity of human activity and development" (p. 54). Other authors (e.g., Li, 2005; Panapaan, Linnanen, Karvonen, & Phan, 2003; Martínez, Pérez, & del Bosque, 2013) and international organizations, such as the World Tourism Organization (UNWTO, 2004), reinforce this three-dimensional perspective.

In a world characterized by universal heritages, such as biodiversity and environmental conservation, education for world citizenship, peace, the fight against poverty and the strategy of smarter power, should be based on forms of "soft power" (Nye, 2010). These call for a shared and committed exercise of power by a plurality of agents through the persuasion of common principles, causes and values (Moreira, 2014). Many international organizations on tourism, environment and sustainability (e.g., European Commission, 2011; UNWTO, 2004) have issued "soft law" instruments (e.g., charters, recommendations, codes of conduct, manifests) that aim to inspire up-to-date statements on sustainable tourism. The World Charter on Sustainable Tourism + 20, launched in 2015 in the city of Vitoria in Spain (ITR, 2015), is an example. Such manifestations of goodwill have in common the fact of being a form of "gobermedia" (Nadales, 2012). Based on a narrative of "soft power" (Nye, 2010), the parties are invited to adhere to its propositions and aims, expressing a proposal of intention and projecting collective paths for the future. Such is the essence of the expression "charter" (Nadales, 2012) or of "preliminary plan", in the sense of Goeldner and Ritchie (2009).

However, these instruments do not fully articulate these international manifestations of "gobermedia" in particular with regards to the role that should be

reserved to local authorities in destinations marked by interventions of national authorities. It is the case of specific tourism products with strong tourist intensity in the territory and the object of national media appropriation, such as surfing. In fact, while UNWTO (2004) presents a set of quantitative indicators for use by local authorities in tourist destinations, the World Charter for Sustainable Tourism + 20 (ITR, 2015) presents qualitative strategic action lines to be undertaken by the same authorities. It reserves to governments and international organizations the same lines of strategic action to be taken in terms of sustainability.

In Portugal, sustainability constitutes a general principle of the public tourism policy (art. ° 3° of Decree-Law 191/2009, published on 17.08.2009 in the Portuguese Republic Diary [PRD]). The law defines three fundamental axes (art. ° 4°). First, the enjoyment and use of environmental resources with respect for ecological processes, contributing to nature and biodiversity conservation. Secondly, the respect for the sociocultural authenticity of local communities, with a view of preserving and promoting their traditions and values. Thirdly, the economic viability of organizations as a basis for job creation, better private and public infrastructures, and entrepreneurship opportunities for local communities. A favorable redistribution of sustainability benefits to local communities is affirmed as both a principle and a necessity of the intervention by the local authorities as legitimate representatives of communities.

How local authorities can intervene effectively in favor of tourism sustainability is yet to be seen. As proposed by Zimmermann (2014), these entities can support their decisions and actions on the recommendations of international organizations and national tourism policies, adding specific strategic lines of sustainable management adapted to the data, context and local reality. Rigorous academic research can inform those decisions and actions. By characterizing the opinions of two relevant stakeholder groups for surfing tourism practices, the present study might help local leaders obtain a clearer picture of reality (Timur & Getz, 2008; Towner & Milne, 2017) and, consequently, develop informed instruments for sustainable development and management of surfing tourism in favor of local populations. This is particularly important in territories where beaches are marked by strong interventions and environmental and maritime supervision by national authorities, such as Aljezur.

As previously mentioned, there was an exponential increase in the number of surfing tourists in Portugal (Bicudo & Horta, 2009), with greater intensity in natural coastal areas such as the Costa Vicentina where Aljezur is located, see map on: http://www.cm-aljezur.pt/externalPages/mapa_concelho/default.aspx?lang=pt.

According to the Tourism of Portugal Institute (2017), 582 organizations are currently registered in the practice of surfing and the country is establishing itself as Europe's leading surfing destination. Despite the increase of surfing tourism, detailed statistical data at the national level on the movements of surfers, revenues, turnover, direct and indirect effects of surfing tourism are still nonexistent. A recent news report based on surveys in schools, clubs and surf companies, federated athletes and the national surf federation estimates the annual revenues of the activity to be about 400 million Euros (Calheiros & Barra, 2016). It highlights Portugal as the main European destination for surfing, with about 38% of the market share. In some regions, such as the Algarve, there are studies characterizing the profile of the tourist (Frank, Pintassilgo, & Pinto, 2015; Gouveia, 2013), but little is still known about the economic value of surfing in the region and in particular territories, such as the municipality of Aljezur. Exploring the opinions of surf school and public entities regarding the economic sustainability of surfing tourism in Aljezur might help to shed some light on the issue. It can also help to identify the main social and environmental impacts of the activities. These three dimensions must be balanced in order to obtain a sustainable development of the activity in the territory.

Method

The present study adopted a case study methodology to investigate the sustainability of surfing tourism in Aljezur in the eyes of public entities with environmental, economic and social competences in the territory as well as surf schools operating in the same area. According to Towner and Milne (2017), "the case study method is applicable to surfing tourism as it permits the real-life setting to be explored even when there is narrow contextual material available" (p. 4). The three-dimensional perspective of sustainability based on the principles of ecological prudence, social equity and economic efficiency helped to design the investigation based on triangulation techniques (Contreiras, Machado, & Duarte, 2016). Both public authorities and private organizations were invited to express their opinions regarding social, economic and environmental impacts of surfing tourism in the municipality. Before describing the

procedure, instrument, and sample in detail, a description of the case study area is presented.

Case Study Area: Aljezur Municipality

Aljezur is a Portuguese village belonging to the district of Faro, located in the tourist region of the Algarve, in the south of Portugal. It is the focal point of a rural municipality with a low population density. According to the data of the last demographic survey, it has 5,884 inhabitants for an area of 323.50 km² (National Statistics of Portugal-INE, 2011). The beaches of Aljezur are well known in the region by their exceptional conditions for surfing. They constitute approximately 50 km of still intact coastline with a great variety of spots associated with environmental quality, quality and regularity of waves and proximity between the beaches, thus allowing the practice of the modality throughout the year.

The municipality is located entirely in the natural park of the Southwest Alentejo and Costa Vicentina. Therefore, land use in the territory is subject to strong environmental conditionings by Portuguese legislation, namely the regulation plan of the natural park, to which municipal plans of territorial land use must be conformed, and the plan of coastal zone planning. Consequently, the beaches where tourist and recreational movements occur, including surfing, must obey regulations and competencies of different maritime and environmental governmental authorities. For example, the regional port captaincy classifies the beaches and defines the criteria for granting licenses to surfing schools, the number of licenses given, and the rules for their use. Additionally, there is also a competence attributed to a national environmental entity, the Institute for Conservation of Nature and Forestry, for drawing up, within the framework of the natural park of the Southwest Alentejo and Costa Vicentina, a nature sport charter. This charter is supposed to define the places for practicing sports activities (e.g. surfing), as well as the criteria for their proper execution to safeguard the densities of use, recreational carrying capacity, and compatibility between the activities and the nature conservation aims (art. ° 52 n° 1 and art. ° 81 n° 3 of Regulation Plan n° 11/2011 published in the PRD on 04.02.2011) of the abovementioned natural park. Since this charter has not materialized yet, problems of institutional emptiness and lack of rules in territorial governance exist.

In order to characterize stakeholders' perceptions regarding the impacts of surfing tourism and evaluate the degree of convergence between those perceptions, a quantitative methodology based on the application of a questionnaire was adopted. Convergence of opinions was assumed as a provisional truth agreed upon by independent agents (Ferris, 2010).

The questionnaire was developed considering the literature on sustainability and the economic impacts on surf destinations (e.g., Dolnicar & Fluker, 2003; Hall & Sillitoe, 2007; Martin & Assenov, 2014; Tantamjarik, 2004; Towner & Milne, 2017). It focused on the perceptions regarding the impacts of surfing activity, namely strengths and weaknesses as well as threats and opportunities in the social, environmental and economic dimensions. Participants were also asked about entities and resources to be involved in the development of surfing.

At the invitation of Aljezur City Council in May 2016, in person or by e-mail, nine public entities participated in the study. The entities have different levels of intervention and power: national (e.g., Portugal Tourism Institute), regional (e.g., Commission for Coordination and Development of the Algarve Region), and local (e.g., Aljezur Municipality, Civil Protection of Aljezur). This allowed a plural, independent and dynamic participation of diverse visions and perspectives.

Regarding surf schools, the questionnaire was applied in open invitation sessions organized by the City Council of Aljezur or, in some cases, by one of the members of the research team in the headquarters of the entities. Of the 31 surfing schools licensed to operate in the municipality of Aljezur, 24 have participated in the study, covering 77% of the licensed schools.

Results

Data Analysis Procedure

Data were analyzed using the statistical software IBM SPSS Statistics V22. The results were organized according to the three dimensions of sustainability (economic, social and environmental). For each item, participants' answers were converted into a convergence index. For the calculation of the index, first the mean value regarding the positioning of each group in the item was calculated; then, the coefficients of variation (as a relative dispersion measure) was elaborated. Thirdly, the convergence index between public and private entities was calculated. The coefficient of variation in each of the questions was calculated using the following formula:

coefficient of variation =
$$\frac{S}{\overline{x}} \times 100$$

Where S indicates the standard deviation of the answers to each question and \overline{x} their respective mean value.

The calculation of each convergence index resulted from the application of the following formula:

$$CI = \left(1 - \frac{\sqrt{(\overline{x}_{Pub} \cdot \overline{x}_{Pri})^2}}{4}\right) \times \left(1 - \frac{S_{Pub}}{\overline{x}_{Pub}} \times \frac{S_{Pri}}{\overline{x}_{Pri}}\right)$$

Where \overline{x}_{Pub} and \overline{x}_{Pri} are, respectively, the mean values of the positioning of public and private entities (surf schools). In the same way, S_{Pub} e S_{Pri} respectively, designate the standard deviations of the responses of public entities and private entities. As can be seen, the calculation of the index incorporates, in a first factor, the similarity between the mean levels of response of the two groups, weighing, in a second factor, their level of agreement/dispersion. Each index expresses, on a percentage scale, the level of perceived convergence in the responses collected from public and private entities.

Stakeholders' Opinions Regarding the Economic Impacts of Surfing Tourism

Regarding the economic impacts of surfing tourism in Aljezur, from 24 indicators with high agreement among public and private entities, five stand out with the highest economic convergence indexes. Table 1 presents these five indicators with a higher level of agreement between public and private entities in relation to surfing activity (A) and the actions that are necessary (B) for a better management of the activity in the municipality. A mean value of convergence for each dimension is also given.

The highest indicator refers to the idea that surfing promotes the notoriety of Aljezur as a tourist destination showing that there is almost unanimity in the perception of surfing as one of the main tourist offers of the municipality (97% of convergence). The improvement of cooperation, support and participation in the activity and the need of more information for the practice of surfing obtained a similar percentage of consensus (94%), evidencing that both public and private entities consider that the activity needs more stimuli, incentives and support, based on principles of cooperation and participation in the activity. These indexes demonstrate that cooperation between

public and private entities, based on the involvement and participation of all stakeholders, is an indispensable condition for the economic sustainability of the surf product in the municipality of Aljezur. They also demonstrate the need to reformulate the product offer based on the beach support action, its planning and development. Such is the case of the provision of more showers, safety and hygiene, which received 92% of agreement, a percentage similar to the one related to the need of more regulation, planning and management of infrastructures and accesses (parking lots, restaurants) (91%), substantiated in a higher public intervention in the regulation of the space.

- Please insert Table 1 around here –

Stakeholders' Opinions Regarding the Environmental Impacts of Surfing Tourism

Concerning the environmental dimension, 19 indicators were assessed by participants. The five indicators with the highest values of environmental convergence are present in Table 2. The highest convergence value (95%) focused on actions aimed at improving information, compliance and monitoring of already defined planning and conservation plans, in which consensual opinion of public and private entities is demonstrated in the interest of compliance with the activity norms. Moreover, there are convergent perceptions regarding the changes in regulation, land use planning and management that are need to improve the environmental component of the product. The perceptions obtained were better land use planning of the beaches and their accesses (85%) and promotion of good surfing environmental practices (91%).

- Please insert Table 2 around here –

Stakeholders' Opinions Regarding the Social Impacts of Surfing Tourism

Regarding the social dimension, 19 items were assessed by participants. The ones with higher convergence indexes refer to the fact that surfing tourism increases the fixation and employability of the local populations (95%) and promotes the improvement of local infrastructures and services (95%). The need to raise awareness and involve the local community and beach users in a strategy to preserve the natural space of the beaches and its surroundings obtained a similar level of agreement (94%). These three attributes of convergence are a good reflection of the importance that the respondents attributed to surfing as a driver of sustainability and social development in Aljezur. The

items related to the territory deserved high convergence scores, such as more citizenship actions and sensitization for surfers and bathers related to the norms of beach use (89%). This may indicate that the respondents consider important the human component in the preservation of the places where the activity occurs, in a perspective of continuity and safeguard of the endogenous characteristics that lead to consider Aljezur a preferential spot for surfing. Similarly, they consider important the prevention of risk of accidents and the safety of all users of Aljezur's beaches, including surfers.

- Please insert Table 3 around here –

Conclusions

The present study aimed to describe the perceptions of two stakeholders - surf schools and public entities - regarding the social, environmental, and economic impacts of surfing tourism in a rural low-density municipality that has a strong tourist intensity in the territory, as well as evaluate the degree of convergence between those perceptions.

In this case study, findings revealed that regarding the economic dimension, in a general way, participants believe that the municipality should play a greater role in the planning process of the surfing activity in the territory, which is in accordance to the importance given by literature to local government authorities' intervention in planning (Hartmann & Kwauk, 2011; Towner & Milne, 2017). This can be done namely by intervening in the development of more beach supports (e.g., showers, safety and hygiene), improved management of infrastructures and accesses (e.g., parking, restaurants). A strong consensus also exists regarding the assumption that surfing is a key product in the municipality, as it promotes its notoriety as a tourist destination, which induces the municipality to present a strategic plan for surfing.

In the environmental dimension, findings suggest that it is necessary to improve the information, compliance and inspection of the land use plans, both at the general level and in surfing. A nature sport charter is also important to promote good practices of the beach users so that there is a better safeguard of natural resources.

In the social dimension, findings indicate that participants assume that surfing promotes the development of the municipality by fixing and increasing the employability of the local population. It is interesting to note that the convergence attribute preparation of an annual monitoring report on user satisfaction and the beach

experience is in line with the characteristics of surfing as a tourism product for its users (Tantamjarik, 2004; Towner & Milne, 2017), whose opinion and degree of satisfaction is considered by the respondents as an important aspect for local sustainability. Participants stress the need for investment in local infrastructures and services. Due to its growth, it is important to involve the local community and its users in the preservation of the natural space of the beaches and their surroundings, either through citizenship actions or through their auscultation (Martin & Assenov, 2014). It is important to emphasize the importance of the involvement of local inhabitants, as well as other relevant stakeholders, as being a principle key for the success of sustainable tourism development in a destination, as discussed in the literature (e.g., Ciles, 2009; Martin & Assenov, 2014; Towner & Milne, 2017).

Practical Implications

As suggested by the literature, the municipality of Aljezur can adopt a strategy of sustainable tourism governance in its territory through the symbolic power of manifestos, letters and good practices recommended by world and international organizations, but adapted to the context and local reality. The findings here reported can be a useful advantage to tailoring such strategy. In fact, the positioning of a sustainable tourism supply in a territory depends on the creation of a favorable framework of perceptions by the public and private agents involved in its formulation and dissemination. The framework, control and monitoring of municipal tourism sustainability is based on indicators of environmental, economic and social convergence of the problems, attributes and actions to be undertaken in the various activities that make up tourism, in particular those predominant in the use of the territory.

Thus, the research team developed a sustainable municipal management charter of the surf tourism product in the municipality of Aljezur. This is a proposal for a declaration of the municipality of Aljezur's commitment to develop a sustainable municipal management strategy for a tourism product with a strong presence in the territory. It was based on: 1) a three-dimensional perspective on sustainability (environmental, economic and social); 2) the sustainability of a tourism activity as a temporary result of a convergence of perceptions about environmental, economic and social dimensions in the territory; 3) Convergence as the basis for a local tourism policy and balance between public and private opposing interests; 4) The "soft law" as an instrument of intelligent power of local authorities in matters of tourism sustainability;

5) Tourism sustainability as an instrument of "intelligent power" based on transversal, participative and well known scientific methods. The charter is accessible online (link will be provided after paper's approval to assure blind review) and referred on the publication of the final report of the surf study by the local municipality of Aljezur (link will be provided after paper's approval to assure blind review).

The charter is a repository draft of local government principles and incorporates suggestions, strategies and recommendations resulting from the participatory public-private process on convergence indicators, demonstrating the importance of democratic methods in the organization and functioning of institutions and sustainable good governance of territories. The charter presents ten articles, and in the first one, general principles are described (sustainability, socio-cultural authenticity, business economic viability, triple principle of economic, social and environmental responsibility of users and surf companies). The remaining nine articles are divided into three dimensions, successively economic (art. II to IV), environmental (art. V to VII) and social (art. VIII to X).

Based on the findings reported above, the proposal aims at the municipality committing itself to participate in the preparation and elaboration of beach support plans (art. II no. 3), developing its support activity to surfing, based on strategic principles of cooperation (art. III.1) and improvement of public and private participation in coordination, dissemination and tourism promotion (art. IV.2).

In the environmental dimension, the proposal aims at demonstrating that surfing is carried out within a framework of qualification, support and incentive to protect and enhance environmental resources (art. V no. 1). In addition, it is desirable to regulate the activity through sport charters (art. VI no. 2), as well as an annual monitoring of their practices and their environmental impacts (art. VII no. 4).

In the social dimension, the importance of the association of the local community of Aljezur with the benefits of the surfing activity, is emphasized, namely, in the creation of direct and indirect employment (art. VIII no. 1), which should be included in the beach support plans; plans for the definition of the rights, duties and responsibilities of surfers (art. IX. no. 3) as well as in the social development strategy. It is recommended to reinforce citizenship actions, involvement and awareness of local populations towards economic, social and cultural importance of surfing as a tourist product (art. X no. 2).

As a final analysis, in all dimensions (economic, environmental and social, respecting art IV no. 3, VII no. 4 and X no. 3), stable, financial support is recommended. This is proposed to be obtained through the regulatory creation of municipal taxes or contracted public-private partnerships, legitimized by the purpose of its allocation to the actions obtained in the highest economic, environmental and social convergence indexes, thus enabling a more effective exercise of municipal government action.

Final Remarks

In a year (2017) declared by the United Nations as an international year of sustainable tourism for development, this research constitutes a contribution to the possibility of any municipality becoming an agent and factor of a cause, as noble, just and universal as the contribution to global sustainability.

Local tourism sustainability goes beyond the simple conception and monitoring of uniform models, application of formal legal rules and batteries of global international indicators as proposed by UNWTO (2004). Sustainability is reached through contexts of local public-private participation and implies indicators and results of social, economic and environmental convergence of perceptions among stakeholders. These allow a better participation of municipalities in the management of local tourist destinations to higher levels of institutional sustainability.

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