

Surf tourism: segmentation by motivation and destination choice

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ABSTRACT

The choice of touristic destinations depends on a number of factors, whether they're personal, sociological or economical. The tourist demand is, thus, closely related to the decision that people make when planning their leisure activities. The following analysis seeks to provide information that will provide guidance to public authorities and companies planning in the strategy of sustainable tourism development within a specific segment, in this case surf tourism. This is a new business opportunity, currently having an assuming an important role in the development of regions.

Motivation involves a selection process based also on the attributes of the destination. The main goal of this study, trying to make the characterization and profile of surf tourists, is the identification of factors implied on their motivation and the resulting segmentation of this market. The understanding of these issues constitutes is an important contribution for the promotion of a destination's better performance and competitiveness.

The study was based supported in a collection of data from a questionnaire to surf tourists. The market was segmented using multivariate analysis: factor and cluster analysis. The main results of this study have identified that surf tourists value certain attributes when choosing a destination for surfing, which can be synthesized in the factors "Destination", "Entertainment and Recreation" and " Surf Quality", as well as and the existence of two opposing segments, that value different attributes, when choosing a surfing destination.

Keywords: surf tourism, destination attributes, tourist motivation, pull factors, multivariate analysis.

INTRODUCTION

Tourism is, nowadays, one of the activities that contributes the most to the survival of numerous territories. The tourism activity takes economic advantage of the existing resources and it's an important factor for economic development.

As an economical phenomenon, tourism develops around the economic variables that influence and condition. As a psychological phenomenon, a tourist trip is preceded by a specific need, which creates a reason to travel and sets a goal for the trip (Stringer and Pearce, 1984). As a social phenomenon, tourism assumed as protector and enabler of social contacts and relationships. It has a leading role in the culture dissemination.

Observing and analyzing the development of the tourism phenomenon on a larger scale, caused by the emergence of new trends related to the practice and leisure, as well as the systematic involvement of this phenomenon, shortcomings were observed in certain aspects of this activity. It is understandable, therefore, the lack of studies on tourist motivation, who, according to Beni (1998), *"is the reason why the tourist has to make a trip."* The decision process of choosing a destination is a question posed asked to many researchers, and it is an important one, both for the development of tourism and several organizations (public and private).

The increasing heterogeneity on individual's preferences is necessary to deepen the understanding of the factors that can influence their behavior and decision to choose a destination, especially a surfing one. However, knowing the consumer is not an easy task. As the literature demonstrates, the tourist motivation is a dynamic process with multiple interfering factors, both internal and external, that influence an individual's decisions and condition their decision when choosing a destination. The motivation is useful to explain the behavior of tourists and is considered by many authors as the starting point of the decision process.

In a favorable strategic location, Portugal cannot be dissociated from the sea that embraces it and from which it depends on. Since most tourists were motivated by the sea, and taking into account the growth of activities and companies linked to this natural resource, the trend for active vacations justifies the increasing demand for water sports activities, including surfing.

With a history of success, this sport has been gaining more fans in recent times, whose lifestyle includes a deep respect for nature and the environment. Several thriving economical activities have arisen from it, giving place to what will be, from now on, addressed as the surf industry. In terms of sustainability, surf tourism is not a massive tourism, but it's a booming market and it's environmentally sustainable. Because the sport depends on a natural resource (waves), the surfers value a good environmental practice, which encourages beach preservation.

In this context, understanding the motivations of each individual allows us to see the different reasons that people have to participate in tourist activities such as surfing, and, consequently, try to achieve the desired result.

To meet the research problem, a set of goals were established, namely: characterize the surf tourist profile, evaluate the importance of the attributes of a surfing destination and the implicit dimensions of the tourist motivations, in order to determine homogeneous segments based in these dimensions.

Tourist motivations

Many of the models and theories applied to the study of tourist motivation recognise that motivation begins with the individual needs and that there are conscious and unconscious motives that affect the respective behaviour. These studies seek to conceptualise motivation based on psychological (personal development) and social (social impulses) factors that motivate or create a desire to travel. Jamal and Lee (2003) identify and compare these two predominant approaches of tourist motivation, respectively micro-level and macro-level theories. For these authors, micro-level theories (psycho-social perspective) conceive the psychological mechanisms of tourist motivation from intrinsic factors to certain tourists themselves and the macro-level theories (sociological perspective), elected as central factors of certain tourists' motivation, structural and institutional conditions that trigger behaviours' breakthrough against the standards of everyday life, designing their sense of living in an imagined place.

The tourist motivation is defined as *"a significant mindset that has an actor or group of actors to travel"* (Dann, 1981), and it is, therefore, a crucial element of demand, since *"the trip is a response to something that is desired, but is missing"*.

One theory widely discussed and analysed in tourism and that broadly relates to the motivation to travel in a sociological perspective is described by Dann (1977, 1981) and Crompton (1979), which led to the *Push and Pull Factors Model*. The basic idea of this model is the decomposing of destination choices by tourists, according to two motivational factors. As defended by the authors, the push factor pushes the tourists away from home, reflects a desire to leave; the pull factor draws tourists to a destination.

Gnoth (1997) points out that the first group focuses on motivations or pressure factors (push), while the other group focuses on attraction factors (pull), which is linked to the appeal of the destination. The push and pull factors are fundamental for the tourist motivation, since they are the ones who explain and influence the tourist behavior. According to this approach, Gartner (1993), Kim & Lee (2002), Moutinho (1987), Sirakaya, McLellan and Uysal (1996) consider that the push factors are those that trigger the desire to travel, or, in other words, are the socio-psychological constraints which "push" the tourist, regardless of the destination that he/she may chose, which is connected with the individuals' emotional aspects, such as their needs and desires. *"Push factors are the intrinsic, personal motivations and desires that influence a person to make decisions regarding travel, such as travel destination and trip activities"* (Ma, 2010).

The pull factors are an outside force defined by the destination characteristics, that are related with the destination itself, which exert an attraction for visitors and determine their choice, in other words, satisfy the push desires. When planning a trip, the tourists search destinations and activities (pull factors) that match their needs and desires (push factors). Those factors are present in tourist destinations and "pull" the consumer. According to Kim and Lee (2002) the pull factors are perceived from a supply-side dimension. In this perspective, the supply is generally considered as exerting a force that attracts the individual.

It is assumed, therefore, that the tourist motivations are the causes that lead people to undertake the trip. Among them, there is always one that is the main, the most important factor, known as central and which determines the type of trip. Motivation is therefore a critical variable in tourists' choice during the decision making process (Kay, 2003). Once identified, it is possible to develop projects to attract, satisfy and retain the target audience (Kotler and Keller, 2006).

Beni (1998) states that tourism can encompass a set of "*different motivations, needs and preferences of tourists by main product permanent or temporary.*" Rather than different sites or opportunities to rest, people travel more in search of new experiences, associated with various activities. This way, several types of tourism are identified, according to the diversity of motivations and consumer interests and destination features/attractions, in order to adapt the existing offer to the demand motivations (Cunha, 2009) or to further develop it. The destination's success depends, thus, on the ability to respond to diverse motivations.

Tourism, sports and sports tourism

The relationship between sports and tourism has become an emerging phenomenon in today's society (Pigeassou, Bui-Xuan and Gleyse, 2003; Weed, 2009), where participants and spectators are part of them. What we see today is what Hinch and Highman (2001) describe as a confluence between these two concepts: "*sport is an important activity within tourism and tourism is a fundamental characteristic of sport.*"

This dependency relationship between the above-mentioned factors is visible in many ways, with the existence of a set of activities that are both touristic and sports. As Weed and Bull (2004) mentioned, "*The development of sports requiring the participants themselves to travel and the development of sporting activity involving travelling spectators*". In this sense, and according to Pigeassou, Bui-Xuan and Gleyse (2003), these fields represent a common area where the two activities overlap; this area of overlap or interception gave rise to sports tourism. As per Gibson (1998):

Sport tourism includes travel away from ones' primary residence to participate in a sport activity for recreation or competition, travel to observe sport such as the grassroots or elite level, and travel to visit a sport attraction such as a sports hall of fame or water park.

The development of sports tourism is associated with a wide range of available supply which, together with new lifestyles, leads to an increasing demand (Ritchie and Adair, 2004), presenting as a way of combining leisure with the opportunity of practicing sports, enabling what Standeven and De Knop (1999) refer to "*daily monotony compensation.*"

The relationship between sports and tourism is very close and clear, since a sport activity can only be considered touristic if is directly related to a tourist activity. Sport is, thus, seen as an agent capable of motivating tourist segments, meeting the needs (motivations) of athletes/clients (players or spectators). Citing Weed and Bull (2004), "*Sport and travel became central aspects of people's life.*"

Sports tourism is, therefore, a set of sports activities involving tourists, either as participants or spectators. In order to consider an individual as a sports tourist, this

individual has to be a tourist and simultaneously participate in a sport activity or one activity being developed in a sports context. Thus, it is possible to verify the existence of two common points in the definition of a sports tourism/tourist: the need for partnerships between tourism and sports and the inclusion of sport practice, but also assistance while spectators.

Taking into account that, tourists, when choosing their holiday destination, request information about which sports activities they'll have the possibility to enjoy (Lança, 2003) the various regions seek to identify a particular sport activity with the region itself, in order to appeal to the sport participants, and the potential participants that want to experience new activities while visiting the region. Thus, it is an indisputable fact that sport is an increasingly growing segment in the tourism industry, providing numerous sport activities to tourist and significantly contributing to the destination's choice, leading to an increase in the development of touristic infrastructures for sports activities.

About the motivational tendencies and according to Lança (2003), the new generations¹ look for different practices, more active ones, valuing time spent in the countryside, activities with a high degree of unpredictability and risk, convivial and spirit group in activities (surfing, skiing, mountaineering, paragliding). Marivoet (2002) states that the practice of physical activities allows for the satisfaction of a set of social needs and activities that have a higher degree of uncertainty and adventure, the vehicle that best serves this satisfaction, in order to break the routine and monotony of daily life.

It is clear that the combination of sports and tourism depends on the interpretation of motivational principles. Since motivation may be based on the need to escape from the everyday environment - individual needs of socialization, social distinction, breaking routine and the monotony of everyday life, among other factors (push factors), or the desire to escape to another environment – tourist and sports systems in place of choice (pull factors), or a combination of both, often without the tourist even having a clear sense of the trip's purpose.

In this context, nautical tourism, considered as a coastal tourism segment related to leisure practices and sports activities in contact with the sea and associated with other types of tourism, such as the sun and sand (Ferradas, 2001), has, as base motivation, according to the National Strategic Plan for Tourism (PENT, 2006) enjoying an active trip in contact with water, with the possibility of doing all kinds of water sports, whether with leisure or competition purposes. This type of tourism is often classified as a subtype of sports tourism (Rodriguez, 2004), being one of the main strategic touristic products of PENT (2006).

According to Lopes (2009), the sea appears as a promising challenge, one where there are significant opportunities for value creation. In terms of recreation, the sea economy shows a remarkable growth in recent years as a result of the increasing demand for healthy destinations, active vacation, new experiences and closer interaction with the environment. The strategic segment of Leisure and Tourism is seen as an opportunity, one that adds value to the Portuguese economy.

¹ According to Marivoet (2002), the younger generations are, broadly, bearing new values and habits sports, with higher sports values than those of older generations, helping the growth and diversification of the market for sports tourism.

The nautical tourism segment includes a wide variety of activities, one more active and associated (or not) to competition, covering the various nautical sports that can be practiced in the sea, rivers and estuaries, ponds or lagoons, among other places, for contemplation and/or rest as part of a tour or to enjoy the coastline and its attractions, such as thalassotherapy and cruising. Examples of nautical sports are: sailing, light sailing, windsurfing, kite surfing, surfing, body boarding, rafting, rowing, canoeing, kayaking, water skiing, sports fishing, spear fishing, diving (Rodriguez, 2004).

In terms of potential income, Westwood (2005) states that the water sports tourist spends an average of about 80 €/day. In terms of trends, it is estimated that, over the next ten years, the growth rate of this type of tourism can be established at a level higher in Portugal than on an European one, with a cumulative annual growth rate of 11% (THR, 2006).

Among these activities there are some that stand out, due to the fact that they're currently gaining more importance, and, therefore, creating large potential for Portugal, namely radical sea sports (surfing, body boarding, kite surfing, ...), which is precisely one of the sectors that can best combine sustainable growth with the creation of new economic opportunities within the sea economy and, in particular, in areas where it is possible to practice these sports (Gamito, 2009).

The surf tourism

Sports and nautical tourism, are a way of combining leisure with sports/nautical activities, allowing the tourist to enjoy both a sport activity and contacting with nature. The first fact is to consider this modality as a sport, as the challenge is described through the interaction between the participant and the natural environment where the activity is developed (Standeven and De Knop, 1999). However, it is only in 2003 that Martin Fluker defines the typology of surf tourism for the first time.

Surf is currently in a period of increasing growth, and it's practiced in all the beaches of the planet that provide ideal conditions (Steinman, 2003) for its practice. It's considered an industry that involves surfers and a significant number of people who travel to domestic and international destinations, as surf tourists or to do surf tourism (Donicar and Fluker, 2003a), which, according to Fluker (2003) can be defined as:

The act of people travelling to either domestic locations for a period of time not exceeding 6 months, or international locations for a period of time not exceeding 12 months, who stay at least one night, and where the active participation in the sport of surfing, where the surfer relies on the power of the wave for forward momentum, is the primary motivation for selection.

In order to develop a more comprehensive surf tourism definition, Ponting (2008) used the term surfing tourism, to include those who do not practice the activity, particularly those who travel to follow others who do, to watch surf events or just to experience the atmosphere of surf, sponsored by surfers.

Surfing tourism is travel and temporary stay, undertaken by a surfer, involving at least one night away from the region of the surfer's usual domicile which is undertaken with the primary expectation of surfing waves.

Broadcasted through American cinema, since the 50s and 60s, it has become the gravity center of a diversified industry in California (Kampion and Brown, 2003). According to

Ponting (2009), the rise of the first surf stores, musical bands (*Beach Boys*), magazines (*The Surfer Quarterly*) and surf films (*The Endless Summer*, directed by Bruce Brown), made way for the birth of the surf culture, which is now seen as a way of life – the surf lifestyle, that Silva (2000) refers to as the "*aloha spirit*."

It was based on this dream that surf has arisen in the last fifty years,: from surf camps to surf wear, through the sale and/or rental of surf equipment. Fortes (2007) lists several business activities linked to surf, such as the manufacture of surf boards, accessories and raw materials, surf shops, surf schools, media and specialized companies such as travel agencies, hotels, bars and restaurants that are indirectly related to this sport; a highly specialized market segmentation, promoting job creation and regional development.

Surf is now seen as a sport activity, and, simultaneously, a tourism/economic activity. Buckley (2002) distinguishes between two strands in surf tourism: recreational surf travel and commercial surf tourism. In recreational surf travel, surfers plan their own trips using their own equipment and transportation means and sleep in local accommodation or tents, motor homes or home mobile. The trips can be long or short, domestic or international, but not much money is spent per person/per day. It can be said that recreational surf traveling is as old as surfing.

In commercial surf tourism, whose growth was occurred in the 90's, when tour operators started to plan and organise tour packages that included various aspects of traveling logistics: transportation, accommodation, food, equipment and surf tours (bus tours, boat tours, visits to surf camps, lodges and resorts that hosted famous surfers, competitions, films, and so on). Thus, the commercial surf tourism can be considered as selling tour packages, where customers travel to more than 40 kilometers away from their normal residence and spend the night there, having surfing as their main motivation.

In this sense, surfing using tour operators is considered a tourist activity, but, for surfers, surfing is a competitive sport, a career, a leisure activity, a lifestyle and/or an obsession. This perception is significant for surf tourism, because surf tourists can be defined first as surfers and then as tourists (Buckley, 2002).

This concept affects their behavior in the touristic industry, since the motivations for traveling are related, firstly, with the quality and variety of waves and, secondly, with the lifestyle experience and surf culture, or, in other words, with life around the ocean and beach culture. The search for the secret wave, the never before surfed beaches, becomes the essence of the surfing experience. The goal is to find the perfect wave, and surfing has become a synonym of search: the surfer becomes a nomad (Zucco, 2002). Surfing as a sport (the search for the perfect wave) and the act of traveling are two intersected behaviours/motivations, since surfers venture into travel experiences with the purpose of surfing perfect waves.

Booth (2001) speculates that with the aid of technology, the surf industry developed rapidly in a booming market of clothing, equipment, accessories, surf schools, summer camps and adventure traveling. In this perspective, sports and adventure, including surfing, became an integral part of economic activities, contributing to the economic growth of regions and countries.

For Hardin (1968), waves and surfing can reach values that are beyond the true economic values. The intrinsic values of surfing as a means for providing happiness, an interaction with nature (seen almost as a spiritual experience), and the physical benefits that come from it are not easily translatable into monetary values and are, therefore, often overlooked.

Surfing is an activity designed and operated in a cluster territorial perspective, that can contribute to a development strategy, enhancing human and environmental resources and, which contribute to the sustainability of regional/local economies.

By understanding human motivations, we can better understand the need to participate in sports such as surfing. According to Neto (1995), the individuals' impacts and motivations for surfing are enormous and are oriented in six major indicators:

1. Confrontation with the natural/ecological environment, allowing new individual and collective dynamic, stronger as the sense of themselves and the others;
2. Unpredictability of the environment; the variation of weather conditions, the physical environment characteristics and the alternatives to overcome itself;
3. Risk and adventure, perceiving physical limitations, which implies better organisation and self-discipline;
4. The freedom of choice, according to one's individual time and rules of action;
5. The development of a specific philosophy and culture, relations based on solidarity and conviviality, valuing the meeting and manifestation of collective projects;
6. The fashion creation and daily habits; the importance given to appropriate dressing, language used (surfer slang), the type of equipment used and the most characteristic means of transportation.

While there is little literature about the surfing motivations, studies on other activities suggest that motivation is a multidimensional concept (Ewert, 1993; Falk, Graefe and Ditton., 1989; Fluker and Turner, 2000; Hsu, 1998; Williams, Schreyer and Knopf, 1990). In other words, we can find several reasons that enhance the surfer activity, in order to satisfy the desires or needs of individuals who practice it.

However, and taking into account the requirements of this phenomenon, it is imperative to obtain information on how different groups of surfers idealise the diversity of the various surf destinations, thus contributing to optimize the offer of these touristic destinations.

Dolnicar and Fluker (2003a and 2003b) in studies based on psychographic (which indicate the importance of factors that relate to the surf destination's choice) and demographic characteristics of surf tourists were able to group the athletes/travelers in five specific segments:

1. The price-conscious adventurers;
2. The price-conscious safety seekers (issues with surfing are important, personal safety and health factors, quality of accommodation and lodging facilities for families, discovering new destinations that are not too crowded (these two segments are very similar);
3. The luxury surfers (they don't think the price is relevant, worrying more about accommodation, food and personal safety);
4. The ambivalent tourists (do not present large changes in these characteristics);

5. And the radical adventurers (this group gives great importance to the duration of the surfing season, as well as the existence of secret spots, that are not too crowded).

Understanding the surf tourists' behaviour, especially the motivational process behind them, is of the utmost importance to the development of a marketing strategy, since identifying these tourists and the factors that motivate them and lead them to decide their surfing destination, allows the markets to more easily adjust their available offer to tourists' demand.

Surfing as subculture and lifestyle

If we reflect on the concept of a group's culture, it can be said that it's the peculiar and distinctive lifestyle of this group, the meanings, the values and ideas embodied in institutions, in social relationships, in systems of beliefs, traditions and customs, the uses of objects and material life (Clarke, Jefferson and Roberts, 1976) that define them. In this light, culture is socially and historically loaded, built and lived. In the surf culture, surfers form a group within a society, or, in other words, a subculture where members share common experiences and beliefs that are different from others. The surf culture includes the people, language, fashion, music, literature, films and lifestyle, having the beach as a privileged place for the coexistence of those who identify with this culture, whether learners or simply admirers of the sport, but who relate to the culture, precisely through the consumption of products related to it.

Surfers have the desire for the perfect wave, for life around the ocean and beach culture, therefore the surfing have devoted not only as a sport but also as a culture, a lifestyle, a state of mind, freedom and integration with nature (Hull, 1976). As stated Bukão (2008), *"Surfing is something that combines sport, passion, lifestyle, behaviour, leisure, media and life and, in some cases, even fantasies,"* what Booth (1995) calls *"new hedonism"*.

This means that the sport extrapolated from the space beach and set up a lifestyle that is consumed by people who may or may not be surfers, visit or not the beaches, face or not the sea, live or do not live in coastal areas (Fortes, 2007). Surfing is not limited to the practice of a sport; it's also a cultural habit, with a particular kind of clothing, visual, stores, brands, food, nature, health, music, habits, media and so on.

In 1976, Hull elected five intrinsic factors necessary for the emergence and maintenance of a surfing culture, that may be applicable to the vast majority of surf destinations: 1. Quality and consistency of the waves; 2. Climate (water temperature); 3. Easy public access to the beach/shoreline (exclusivity, cost, distance); 4. Receptivity of residents/local community to surfing and surfers; 5. Publishing the activity to appeal to the community.

The coexistence of these five geographical and social factors contribute to the emergence of a surfing culture and, consequently, to the development of a surfing destination. In short, it can be said that many regions have nice beaches, good waves and may be competitive vacation destinations, but the culture of each one of them is surely unique and this differential becomes determinant in choosing a surf destination.

Methodology

Information gathering and survey structure

The data collection technique used in this study is the questionnaire survey, which aims to gather information that allows the characterisation of the demographic profile of the surf tourist and understand which factors (pull factors) motivate the choice of a surfing destination. The bilingual questionnaire, prepared in Portuguese and English, consists of a total of 15 open and closed questions. It was prepared based on the information collection requirements and it's structured into three groups of issues: the first group is allusive to the surf tourists behavior, the second group seeks to measure the relevance of attributes in the decision process of choosing a surfing destination. This relevance was assessed in a ten-point scale from 1 "Not important" to 10 "Very Important" and the third group relates to socio-demographical characteristics of surf tourists.

These surveys were conducted by direct interview method, since it allows for a greater response rate and greater comprehensibility of the questions prompted by the interviewer's personal assistance. It was chosen the non-probability sampling method, the convenience sampling.

The interviewees were surfers who attended the *Rip Curl Pro Portugal 2010's* event, a stage of the World Tour, from the *Association of Surfing Professionals (ASP World Tour)*, held in Peniche between the 7th and the 18th of October 2010. The sample size was 210 individuals, surfers not residing in the municipality of Peniche and who were over 18 years old. Data collection took place during the course of this event, in the local competition: Supertubos, Lagide and Pico da Mota beaches, in the municipality of Peniche.

The criteria used to validate the questionnaires were based on a question by question analysis of replies and/or no answers. Those whose consistency was doubtful were excluded.

The collected data were analysed using SPSS, version 17.0 - *Statistical Package for the Social Sciences*, in order to gather information that could support the discussion of the results. To characterise the surf tourist profile descriptive statistics were used. To determine the motivational factors and segmentation, multivariate analysis techniques were used, whose goal is to study the interdependent relationship between a given set of variables (more than two variables). These techniques included, initially, the factor analysis which, from the array of preferences, allowed the identification of components or motivational factors. In the second phase, and from the matrix scores obtained above, a cluster analysis to obtain the homogeneous segments was carried out.

Results

To have an idea of the surf tourist profile, the socio-demographical characteristics of the interviewees (Table 1) reveal that the majority is Portuguese (65%), followed by the Spanish (9%), English (8%), German (5%) and French (3%). Around 49% of the Portuguese interviewees are from Lisbon's metropolitan area, 13% of the western region and the others from the rest of the country. In terms of age, the most represented group is between 25 and 34 years old (43.6%), followed by 18 - 24 years old (38.1%) and 35-44 years old (15.8 %), which shows a very young market. Regarding the qualifications, about 60% of the interviewees have completed or are currently enrolled

in higher or post-graduate education. Regarding the employment situation, the data show that most tourists are employed.

Table1. The demographic sampling profile

	Total		Portugal		Spain		United Kingdom		Germany	
Nationality	210	100%	136	65.1%	19	9.1%	17	8.1%	10	4.8%
Gender										
Male	149	73.4%	101	78.3%	13	68.4%	12	70.6%	6	60%
Female	54	8.3%	28	21.7%	6	31.6%	5	29.4%	4	40%
Age structure										
18-24	77	38.1%	62	48.1%	2	10.5%	2	12.5%	4	40%
25-34	88	43.6%	46	35.7%	12	63.2%	12	75.0%	5	50%
35-44	32	15.8%	19	14.7%	3	15.8%	2	12.5%	1	10%
45-60	5	2.5%	2	1.6%	2	10.5%	0	0%	0	0%
Qualifications										
Primary	4	2%	4	3.1%	0	0%	0	0%	0	0%
Secondary school	78	38.4%	56	43.4%	5	26.3%	7	41.2%	2	20%
Higher education	93	45.8%	60	46.5%	4	21.1%	17	58.8%	7	70%
Post-graduate teaching	28	13.8%	9	6.6%	10	52.6%	0	0%	1	10%
Employment situation										
Active	136	67.3%	75	57.4%	16	84.2%	14	82.4%	5	55.5%
Non-active	10	5%	3	2.3%	3	15.8%	3	17.6%	1	11.1%
Student	56	27.7%	51	39.5%	0	0%	0	0%	3	33.3%

Regarding to the frequency with which they practice sport, the majority of the interviewees practices it two to three times a week or more (55.7%), which suggests the existence of two major groups of surf tourists: usual surf tourists and occasional surf tourists. Among the Portuguese surf destinations, Peniche, Ericeira and Sagres stand out as the main preferences. When considering all surfing destinations (both national and international), Peniche and Ericeira are the preferred ones, with Indonesia and Hawaii occupying the third and fourth places.

Results showed that, in general, surf tourists recognise that all attributes listed, whether the variables related to the general characteristics of the destination or the variables related to the specific attributes of the product, are responsible for the purpose of the travel/destination's choice (Table 2). However, the variety of wave types, diversity of local spots for surfing, surf culture and surf lifestyle and the average wave height are identified as the core attributes when choosing a surfing destination. The peripheral or less relevant attributes in the choice of the destination are commerce and service diversity and cultural heritage. It's the specific attributes of the destination, those who depend on the natural conditions and environment preservation that most influence the choices of surfers.

Table 2. Means, mode and standard deviation of the attributes

Attributes	Mode	Means	Standard deviation
Scenery	10	7,78	1,913
Hospitality	7	7,63	1,759
Cultural heritage	5	6,26	2,206
Climate	8	7,18	1,965
Accommodation	7	6,79	1,952
Environmental quality	8	7,71	1,704
Gastronomy	5	6,70	1,821
Night life	7	6,79	2,077
Accessibilities	7	6,56	2,098
Commerce and services diversity	5	6,04	1,926
Safety	7	7,33	1,791
Price (value for money)	8	7,55	2,079
Surf culture and surf lifestyle	10	8,65	1,607
Variety of wave types	10	9,03	1,321
Diversity of local spots for surf	10	8,98	1,294
Average wave height	8	8,16	1,503
No crowd	10	7,55	2,336
No localism	10	7,44	2,352
Sets' frequency	8	7,73	1,643
Water temperature	8	6,52	2,076
Good access to surf spot	7	7,10	1,906
Bar/esplanade on the surf spots	7	6,71	2,293
Infrastructure support in the spot	8	6,53	2,480
Valid N = 175			

To achieve the core objectives of this study and indentify their motivations, as well as to determine the different segments of surf tourists with these motivations, we was used multivariate statistical techniques. The first phase to determine the motivational factors with the greatest impact among surf tourists used a factor analysis, in particular the main components' analysis, from which it was possible to determine seven different dimensions of choice (pull factors): "Destination", "Entertainment and Leisure", "Surf Quality", "Wave Availability", "Infrastructure support", "Climate", "Price"(see tables 3 and 4).

Table 3. Index Kaiser-Meyer-Olhin and Bartlett's Test

Measure of sampling adequacy Kaiser-Meyer-Olkin (KMO)		,816
Bartlett's test of sphericity	Approx. Chi-Square	1782,335
	df	253
	Significance	,000

Table 4. Components weight matrix after rotation

Attributes	Principal Components							Communalities
	1	2	3	4	5	6	7	
Scenery	,809							,717
Hospitality	,822							,766
Cultural heritage	,744							,660
Climate						,806		,762
Night life		,633						,506
Accessibilities		,761						,548
Commerce and services diversity		,719						,558
Price (value for money)							,777	,546
Surf culture and surf lifestyle			,681					,768
Variety of wave types			,856					,672
Diversity of local spots for surf			,886					,737
No crowd				,868				,733
No localism				,831				,731
Sets frequency				,657				,807
Water temperature						,609		,831
Bar/esplanade on the surf spots					,723			,595
Infrastructure support in the spot					,749			,836

After the factor analysis and in order to connect and consistently group obtained data, a cluster analysis was performed. The results suggest the existence of two well defined groups, based on the importance they give to the attributes when electing a surf destination, i.e., two segments of surf tourists with different characteristics. Of the 210 interviewees, 175 were considered in the cluster analysis. Group 1 consists of 122 cases and there were 53 cases in group 2.

The structure of both segments is similar between them and in relation to the total sample. Thus:

- Segment 1, larger, represents 70% of the interviewees, aged 25 to 34 years old. Less frequently it includes most foreigners from England and Spain, considers Peniche, Ericeira and Linha do Estoril as main surfing destinations and gives greater importance to the variety of wave types, diversity of local spots for surf and surf culture and ambience as key motivators when choosing a surf destination.
- Segment 2, smaller, represents 30% of the interviewees and is characterised by younger surfers (18 to 24 years old), more frequently, from Lisbon's metropolitan area, considering Peniche, Ericeira and Sagres as main surfing destinations and giving greater importance to the variety of wave types, diversity of local spots for surf and climate as key motivators when choosing a surf destination.

Table 5. Clusters Synthesis

	<i>Cluster 1</i>	<i>Cluster 2</i>
Dimension	69.8%	30.2%
Nationality	58% Portuguese Spanish	60% Portuguese (23% AM Lisboa) English
Age structure	25-34	18-24
Gender	Male	Male
Frequently leaners	23.1%	38.5%
Preferred Portuguese Destinations	Peniche Ericeira Linha do Estoril	Peniche Ericeira Sagres
Principal attributes motivators	Variety of wave types Diversity of local spots for surf Surf culture and ambience	Variety of wave types Diversity of local spots for surf Climate
Less valued attributes	Commerce and services diversity Cultural heritage Water temperature	Accessibilities Night life Commerce and services diversity

The analysis shows that the large difference between the two groups in the process of choosing the destination is the **surf culture and surf lifestyle** considered the most important for cluster 1. This conclusion, which seems to be the most significant, leads us to consider the surf culture and ambience attribute as the differentiating and strategic element in the management of a surf destination. Investing, in this case, might prove to be somewhat risky.

This attribute seems to be fundamental for the sustainability of a surf destination, since the sustainability of this destination depends on the relationship between surfing and the land. One cannot dissociate the sport activity - surfing, from the beach and from the environment where the activity is practiced and/or observed. These cultures and segments always go together. The ambience (local) should relate with surfing and surfing with this ambience. It will be important to mention here that there are two types of surfers, as mentioned above by Fluker (2003) and Ponting (2008): regular surfers (frequent surfers and beginners, who come in search of new experiences) and viewers (public and non-surfers): those who do not surf, but admire the sport lifestyle and relate

with its subculture values. They are responsible for the majority of the surf consumption market, by sharing this subculture's values without actually going to the beach, just through consumption of products related to it.

Thus, the surf culture and surf lifestyle influence not only surfers but all who want to associate with this culture, which makes this tourism segment an important development factor. As mentioned before, surfing turned into something bigger than the sport itself: it embodies its own culture, lifestyle and market and the search for a more enjoyable life, attracting those who live this reality or simply identifies with it.

Moreover, surfing has a great emotional appeal, because surfers will stay in the destinations even when there are no good conditions to surf, contemplating the sea and the waves. Surfers form a group within society as a whole, i.e., a subculture where members share common experiences and beliefs that are different from others (Solomon, 2008).

As advocates Lopes (2009), in tourism, what can persuade tourists to visit (and revisit) a particular location over another, is the level of visibility, knowledge and empathy with the destination and its values. The surf destinations should, therefore, seek to become places that offer experiences related to the surfing lifestyle, rather than just places that have excellent conditions for surfing, but do not have anything else to offer. The surf destinations should have the ability to make a difference, to dream and create appeal. The only way for a surfing destination to become innovative, appealing and more easily marketable, is by being able to create competitive advantages and to communicate to specific segments.

Surfing is a culture and a way of life, and we must share it by trying to provide the ideal environment, space and conditions for people who love to do it, in a healthy and relaxed environment, according to the surfers' spirit and philosophy.

It should be noted that the ambience and surf culture attribute does not depend on natural conditions, such as the variety of wave types and surf spots, but the local agents' vision regarding surfing (local surfers, population, local authorities, sponsors, local associations and other public and private entities) and of their involvement in defining a sustainable and long-term strategy. This strategy should focus on surfing as a business, one that creates wealth, employment and local development, while, at the same time, focusing on environmental issues, through the improvement of coastlines, waves and local beaches' access.

The surf culture and surf lifestyle attribute has the ability to attract more surf tourist segments, fighting the seasonality, contributing to an increase of consumption in catering, accommodation, heritage and other resources, and, simultaneously, identifying with the local community, positioning the destination as a true surf destination. According to the principles of sustainability, the tourism industry only makes sense when it brings quality of living, well-being and wealth for the local populations.

Conclusions

Deepening the study of the tourist motivations, and in this case pull motivations (tourist desire on visiting a destination, which is caused by the knowledge of some of their attributes), proves to be of particular importance and constitutes a key element for the

socio-economical development of destinations, especially because it facilitates market segmentation.

The information obtained becomes a valuable tool for the destination strategists, allowing them to develop adequate offer and at the same time promote their product with specific target segments, through promotional campaigns and investing in new infrastructures, in order to make tourist destinations more competitive and efficient.

As a sports activity, surfing is, simultaneously, a touristic/economic activity and it became a lifestyle. It has proven to be a positive trend in Portugal, which is reflected in the increasing number of surfers of all ages. As a result, profits have increased and anything associated to this market has had good financial gains, such as activities as diverse as selling sports clothing and equipment, the establishment of schools or soliciting sponsorships to organise championships.

Another relevant fact is that surfing, when used as a marketing strategy, appeals both to surfers and non-surfers (surf championship viewers, for example) when deciding to visit a region. The surfer can either be an athlete, or a viewer, which still makes him/her also a consumer and a future promoter of the visited region. During their stay, tourists can enjoy the services and infrastructures as any other tourist would, but with a different requirement level, due to his consumption pattern.

In a difficult period for tourist destinations, when competitiveness and offer is huge, one needs to look for new solutions, new business opportunities and take advantage of the natural resources of their region, in this case waves and beaches. The surf tourism can, thus, become the engine of tourism development for some regions, namely for the municipality of Peniche, where this study was made.

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