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Surfing as Tourist Product integrated in the Azores Destination, Portugal

Abstract

This paper helps to understand that there is still a long way to go in relation to the organization of surfing in the Azores. The aim of this paper is to develop a strategic framework, considering the main keywords collected through interviews with experts and leaders of the surf industry. The approach of this research is qualitative and inductive based on the specific Azores's Surf as a tourist activity region. The sample was selected among experts in surfing area as well as people specialized in the management of surfing as a tourist activity. The information collected in the interviews was encoded by key terms. According to the respondents, it was possible to verify that the tourist offer of surfing in the Azores is not integrated, that tour operators are not organized and that many of the surf schools are not properly certified. The experts know quite well the region and the activity of surfing in Portugal and abroad. Their opinions are certainly a great contribution to the sustainability of surfing in the Azores and a call to action for the needed changes.

Keywords: *Surf, Azores, Tourist Offer, Tourist Product, Strategic Reference.*

Jel Classifications: L83, M14, Z32

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1. Introduction

The Azores (Portugal) have awakened, among the surfing community, a great appeal to practice this modality, especially on the island of São Miguel. The Azores is already a tourist destination recognized for surfing. This recognition is due very much to the small groups of people who, in an individual force, try to give it the imperative notoriety. Surfing in Portugal has been gaining relevance in the offer of Portuguese tourism, being recognized as a strategic asset differentiating in the Tourism Strategy 2027 (Turismo de Portugal, 2017). In 2018, Bloom Consulting (2018) considered Portugal as the most attractive country for surfing worldwide, being at the same time, the most researched *country on the Internet regarding* the topic 'Surf'. The Best European Destinations (EBD), one of the main references for travelers choosing Europe as a holiday destination, has placed Nazaré (1st) and Peniche (4th) among the 10 best surfing destinations in Europe in 2021. Furthermore, EBD is clear in praising Portugal considering that the weather conditions, the sun, the beauty, the tradition and the welcoming people, are attributes that make Portugal the "favorite destination for surfers worldwide" (EBD, 2021). The unique and favorable conditions, along the 850 km of beaches of the continent and islands, able to ensure conditions for surfing throughout the year has led to an increase in surfers and visitors in the various national coastal regions in recent years (Machado et al., 2018; Melo, 2014).

Due to its geographical location and morphology of the islands, the Autonomous Region of the Azores (ARA) is a place of excellence for the practice of maritime sports in particular surf. The winter period is characterized by the strong ripple generated near Newfoundland (Canada) and the constant depressions that plague the region. In summer, the waves known among Azoreans as "swells" or August tides also arouse a strong appetite for surfing (ATA, 2014).

The Archipelago of the Azores is in the middle of the North Atlantic, 1,600 km from mainland Europe and west of mainland Portugal. It consists of three groups and nine islands: the Eastern Group (Santa Maria and Sao Miguel) the Central Group (Terceira, Graciosa, Sao Jorge, Pico and Faial) and the Western Group (Corvo and Flores) (Visit Azores, s.d.). Cale (2012), evaluating the tourist potential of surfing in the Azores, recognized, on that date, that surf tourism was a relatively little developed market segment (niche), with an incipient demand and few local practitioners, but representing an opportunity to assume itself as a major tourist product throughout the ARA. Effectively, according to the Azores Airlines Masters Championships, the international surfing events held in the Azores will have generated a financial return of 50 million euros in the last 10 years (data until 2018), having put the archipelago on the route of this sport (Dinheiro Vivo, 2018).

The Autonomous Region of the Azores is a destination characterized by its image associated with sustainability, with several international awards in this area. In 2019, the Azores received the certificate of sustainable tourist destination delivered by Global Sustainable Tourism Council, being the first archipelago in the world with this distinction (Paiva, 2019). Similarly, in terms of tourism, the ARA won Europe's Leading Adventure Tourism Destination in 2020 and 2021, awarded by the prestigious World Tourism Awards, and was nominated for the 2021 world prize in the same category, as it was in 2020 (WTA, 2021). There is, however, a long way to go, given some little maturity and tourist competitiveness, due to the lack of strategic planning, according to Couto et al. (2017), in an analysis carried out in Ribeira Grande (where many of the stages of the surf circuit are held, including the recent stage of the World Surfing Circuit, from 1 to 6 November 2021). According to the authors, it is necessary to restructure the entire tourist offer, qualify human resources and establish a renewed culture that allows greater coexistence and interaction with tourism.

The presentation of the new Strategic and Marketing Plan for Tourism of the Azores in 2022 will continue to focus on nature and sustainable tourism (Publituris, 2021), so it is

expected that the current research can also contribute to a better positioning of the surf product in the Azores destination.

Against this backdrop, the aim of this research is to evaluate the surf market, based on strategic management tools and with information gathered through interviews with sports experts. In agreement with the professionals of the sector, it will also be possible to understand whether the surf is properly integrated into the global product of the tourist destination and duly valued in its most strategic instruments of regional policy.

2. Literature Review

Surfing, besides being a sports activity, is both a tourist activity with great growth potential, both in economic and promotion terms, and can attract to a region both visitors who practice it and visitors who admire it, even if they are not practitioners. As Reis (2020) says, "surfing and the act of traveling complement each other". On the other hand, by constituting itself as a strong motivation for travel, it should be promoted as such and impose other aspects of tourism where it is practiced (Barbieri & Sotomayor, 2013; Dolnicar & Fluker, 2003a, 2003b; Iliuta & Wiltshier, 2018; Ponting & O'Brien, 2014). In this way, surfing becomes a tourism activity when tourists move outside their usual environment with surfing as their central motivation (Towner, 2016) or, as Young (1983) said, going in search of the perfect wave is what drives them to venture into travel experiences with motivation to surf waves. Buckley (2002a, 2002b), defined surf tourism, regardless of its recreational or commercial motivation, when surfers travel at least 40 km from the place of residence and stay there at least one night. The definition of Tourism New South Wales (TNSW, 2009), reinforcing the criterion of travel and distance, also included those who move not only to surf, whether in domestic or international market, but also to participate in a surf event.

The analyses of the literature on surf tourism have had a significant boost from 2007 (despite the first initiatives still in the 1960s by Finney (1960), using three types of methodology: use of university databases; research in reference manuals, conferences, master's and doctoral theses; communication between reference researchers (Martin & Assenov, 2012). Also the Research Center on Surfing and Sustainability of Coastal Areas (NIS, 2019), cited in Reis (2020), made a strong contribution in the identification of scientific literature in the period between 2012 and 2018, as they did, in the same time period, Valencia et al. (2020) in the review of new lines and research themes. However, despite the growing interest in the subject, research is still reduced (Reis, 2020), being small about the image of surf destinations, limiting itself, almost always, to the analysis of its most tangible characteristics (Barbieri & Sotomayor, 2013).

For Martin and Assenov (2012) any traveler who has an involvement and motivation with surfing, whether beginners or experienced, is part of the broader concept of surfing, as, defines Kings (2020, p. 68) when considering it as "the type of tourism that includes the trip of anyone who has surfing as a primary or secondary motivation. This includes the journey of practitioners, as well as all types of companions or other persons who travel ..., to appreciate the practice of surfing".

The number of surfers has been increasing over the years, reaching, according to Ponting & O'Brien (2014), the 35 million surfers, being practiced in at least 161 countries (Martin & Assenov, 2012). According to Buckley (2002a), in 1998 there were about 10 million regular surfers, with levels of future annual growth that estimated between 12% and 16%. In the same year, Kampion and Brown (1998) estimated that 1.5 million people started surfing every year. The lack of statistical information about surf, not least because, as mentioned by Dolnicar and Fluker (2003b) about 90% of practitioners are not federated or in clubs, did not prevent O'Brien and Eddie (2013) from predicting that in 2023, in a ten-year time horizon, the number of practitioners would be 55 million.

As the number of practitioners grows, the economic relevance of the surf industry has also increased, with strong promising relevance to the local, national, and international economy

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(Buckley, 2002a, 2002b), given its cross-cutting with other sectors of activity and, in particular, tourism agencies (travel, accommodation and catering agencies, events, rent-a-car, etc.) (Kruger & Saayman, 2017; O'Brien & Ponting, 2013).

There are several studies that have been carried out on the economic impact of surfing and it contribute in terms of boosting the profile of productive structures, creating jobs, increasing income and developing local activities and their multiplier effects (Barbieri & Sotomayor, 2013; Towner, 2016, 2018). At the beginning of this century Buckley (2002a) estimated that the surf market was worth 10 billion U.S. dollars (USD) annually, which included the sale of clothing in sports-related brands, sale of boards, accessories and travel-related expenses to typical surf destinations, a figure that more than a decade later will have evolved into annual revenues between 70 and 130 million (Ponting & O'Brien, 2014). Latest data for 2017, according to the World Surf League, point to surf growth swells by more than 30% per year (Fadda, 2020).

Mach and Ponting (2021) estimated that international surf tourism expenditures are valued at between USD 31.5 billion and USD 64.9 billion per year with practitioners willing to pay between USD 1.99 and 4.1 billion for more sustainable surf tourism products. Reis (2020), considering the motivations for surfing, according to Kruger and Saayman (2017), listed a set of motivations in terms of contact with nature, individual overcoming, risk and adventure, search for sensations, freedom of choice and individual choice, escapism, health and well-being, lifestyle and own philosophy, development of his own image and strengthening of the feeling of belonging (to a group with an activity-based lifestyle surf). Other motivations, taking into account the choice of destination, point to psychographic factors of knowledge of other visitors and practitioners, the behavior of the trip (alone, in group, length of stay, choice of accommodation, etc.) and the skills for surfing, depending on the characteristics of the destination itself, the quality of the waves, the climate and, for many practitioners, of local culture (Dolnicar and Fluker, 2003a, 2003b; Towner, 2016). Thus, the behavior of the surf visitor has characteristics, driven and motivated by the search for new places, perfect waves and certain experiences (Reis, 2020).

The classification of surf visitors is vast and varied, certainly due to the lack of a systematization of a universal typology, regardless of sociodemographic factors, purpose, travel behavior and motivations themselves. Martin and Assenov (2012) propose that any traveler who engages in surfing is considered a surf visitor, including the first time (*incidental surf tourists* or beginners), the intermediate (*soft surf tourists*) and the experienced (*hard surf tourists*). Tourism New South Wales (TNSW, 2009) proposes a similar classification where it divides them into *recreational surfers*, *highly skilled surfers* and *professional surfers*, in the latter case, those competing in the world's elite surf tournaments. Kruger and Saayman (2017) identify four types of surf visitors, *beginners*, *weekenders*, *amateurs* and *professionals*. In a study conducted in Portugal, Moutinho et al. (2007) identified three categories of surf visitors, with occasional, regular and *non-surfers* or surf fans (non-practitioners who want to be part, associate and identify with the world of surfing). Ponting (2009), in turn, distinguishes between *touring surfers* (surfers who travel because of surfing) and *tourist surfing* (those who undertake surfing activities, regardless of the motivations for the trip). Barbieri and Sotomayor (2013) advocate that surf visitors are a segment of the tourist market with strong tourist appetite, given the regularity of their trips and their financial availability to resort to specialized travel agents (to surf or watch surf activities). As Santos (2011) points out, tour operators and travel agencies should preferably work with small groups, as they are part of an important share of the surf market, *offering various spots*, managing tourist flows and avoiding overpopulated beaches. According to Portugal et al. (2017), those who travel, rely heavily on specialized tour operators to manage their trips, since surf players prefer these specialists (tour operators), because they make the organization of their trips more effective, to the extent that there are many services associated with surfing that are not even known (Barbieri & Sotomayor, 2013).

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Portugal, as an international surfing destination, has had a strong annual growth rate, between 25 and 30% per year, and in 2008, it would have between 50,000 and 70,000 regular practitioners (Bicudo & Horta, 2009). A debate at the Catholic University on "Will the surf wave in Portugal have an impact on the economy? ", estimated the existence of about 200,000 surfers (Sequeira, 2016), of which 99% would be amateurs, leading to Portugal becoming one of the main surfing spots in Europe and organizing several important international surfing events (SurfPortugal, 2015).

The Portuguese Surfing Federation is composed of about 15,000 federated, 2,500 of which have sports license, 100 clubs, 250 schools, 3 national associations and organizes 140 activities per year (FPS, 2021). Studies on the economic impacts of surfing are scarce in Portugal. According to Sequeira (2016), based on the study of the Catholic University (2014), the surf industry contributes about 400 million euros (€) to the national economy, and the number of companies that organize surfing activities has grown at an annual rate of more than 28%, validating Melo's evidence (2014) regarding market growth, in the number of practitioners, specialized schools and surf fields. Bicudo and Horta (2009) concluded that surfing could generate between €1.5 billion and €3 billion a year for the tourism sector in Portugal. Other investigations point to average daily contribution values, as identified by Gamito (2009), considering that surfers would spend 80€ per day on surfing activities, the 77.42€ of average daily expenses estimated by *Moche Rip Curl Pro Portugal*, one of the two European stages of the World Surfing Circuit (Jorge et al. (2015)), or the 75.7€ per day estimated by Carrasco et al. (2017) on the economic impact of surfing activity in the municipality of Aljezur, Algarve.

Surfing is now an activity with global representation and is defined as the process of going through a wave, through a variety of techniques (Reis, 2020). Given its growing importance for tourism it is intended to evaluate it as a tourist product for the Azores region. Competition between the various tourist destinations can create imbalances in supply leading *Destination Management Organizations* (DMO) to develop effective differentiation strategies. Strategic planning implies a positioning of the destinations and the implementation of a strategy, whose weakness, translates into the inability to achieve critical objectives to the success of a destination (Pike, 2008). Competitive advantages relate to how destinations use and manage their resources in the long term efficiently over time (Phillips & Moutinho, 2014; Crouch & Ritchie, 1999). Thus, there is a need to mobilize competitive advantages for the development of strategies to ensure the economic sustainability and growth of a destination through its competitiveness.

According to Reis (2020) the tourist destinations constitute the geographical space where much of the tourist experience occurs, so its success is influenced by competitiveness and attractiveness, as more and more destinations aim to attract part of the growing tourism market, regardless of the motivation of the trip (Crouch & Ritchie, 1999).

Thus, the success of a destination depends on several factors, highlighting the degree of coordination between the different levels of administration (local, regional and national authorities of tourism); marketing management over destination; the offer of cultural and sporting events; the capacity of administration between the public and the private, benefiting from the resources of the territory (Candela & Figini, 2012). In a study conducted with surfers by Barbieri and Sotomayor (2013) the authors identified that their preferences are not only associated with leisure, but also with the relationship with surfing, with the destination, with the variety of waves and with the quality of the environment, that is, the propensity to travel in search of the perfect wave. A *surf trip* that offers confidence and health care, quality of the environment and meals, accessibility and ease in finding secret locations, the possibility of finding other surfers, conditions for families and the reputation of the destination concerned, contributes to customer satisfaction (Santos, 2011). Similarly, the development of images of surf destinations, the importance of *the media* in its dissemination to marketing campaigns

influence the imaginary of tourist demand and induce the choice of destination (Dolnicar & Fluker, 2003b; Ponting, 2008, 2009).

As a sport and as an economic activity, surf tourism has experienced high levels of growth in the number of practitioners and supporters over the years both nationally and internationally. The search for new waves, new environments, new emotions, new cultures, new friendships has led to the recognition of their importance for tourism, contributing positively to the social, cultural and economic development of the regions. Given the potential of surfing, several destinations have tried to develop competitive positions in the market, whether as a sports or recreational activity.

Also, the ARA, in its Strategic and Marketing Plan of Tourism of the Azores (DRTA, 2015), having as main objective the definition of a set of strategies, aims, among other priorities, to position the Azores as an exclusive destination of exuberant nature and improve the competitiveness of the destination and increase tourist flows. As nature tourism is its priority product, surfing appears, in any case, as a complementary product, with an integral part of nautical tourism and where it is intended to "*attract market segments through the promotion of the sea, its resources and comparative advantages in the development of nautical activities such as diving, surfing, whale watching and sport fishing*".

3. Methodology

The aim of this study is to develop, based on the opinion of industry experts, a strategic reference based on the keywords that should be considered in future strategic or operational plans with a strong focus on the surf product. The approach will be qualitative and inductive using content analysis techniques (Eriksson & Kovalainen, 2008; Silverman, 2006). Empirical data were obtained through interviews with six (6) experts, all surfers, held during the month of May 2021, who dedicate their activities to the development of national surfing. Two of the participants occupy top positions as national leaders (including the Presidency of the Portuguese Surfing Federation), another is a businessman (organizer of the Azores Airlines Pro, stage of the world surf circuit, and promoter of surf events) two are surfers (one professional and one semi-professional) and a hostel owner very geared for the surf market. The bet and selection of these specialists, took into mind the degree of participation and the deep knowledge of themselves about the local surf industry, being natural from the Azores or with regular stay in the territory for professional reasons or for surfing. They are strong connoisseurs and surfers in the territory, allowing, by their experience and knowledge of the Azores, the achievement of technical and professional opinions, depending on their activities and positions they occupy.

Since the face-to-face interview was not possible, the questions were sent to each of the participants by e-mail, and the answers were returned by the same route. For the preparation of the article, the strategic framework defined in Pearce and Robinson (2013) was taken into account, and in the different questions we focused on the instruments of formulation and strategic analysis. All the experts answered ten questions, including the main topics related to surfing: a) Surfing and Sustainability; b) Looking for the ideal spot; c) Differentiating elements of surfing in the Azores; d) Potential of surfing as a tourist product; e) Strengths and weaknesses of surfing in the Azores; f) Opportunities that surfing provides as a tourist offer from the Azores; g) Positioning and strategic formulation factors.

The interviews were organized according to the above-mentioned themes and the results took into mind, above all, the richness of their content and not potential theories that could be underlying them. The information obtained in the different answers was ordered in a word cloud, which is an *observation format* in which the most repeated words can be considered as keywords, and the *edwordle.net* application was used for its treatment.

Even knowing the limitations of the sample, the bet on a small but professional core and specialist in the theme of surfing allows to have more technical answers reducing the noise of irrelevant information and that would only take the focus of the objectives outlined.

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4. Analysis and Results

In this chapter, the results obtained through interviews with specialists are analyzed and discussed. The answers obtained were worked using content analysis techniques. The main objective will be to highlight the ideas of strength, with framework and strategic valence, that allow to elaborate a reference for future support to the formulation of strategies and policies for the capture of tourist flows related to surfing to the Azores destination and that has already been worked and considered in the various Strategic and Operational Plans of the Region. Regarding the main concepts emanating from the interviews and which can corroborate the need for strategic planning, as Couto et al (2017) reported when analyzing the tourist offer in Ribeira Grande, the most relevant results are included in four major dimensions: nature, surfing as an activity, the destination, and the strategic factors.

4.1. Nature

About Nature, the interviewees say that Surf has always had an intrinsic connection with nature, and more and more, at this moment, the oceans are the flag that Surf carries for the entire international community. Regarding the environmental issue, due importance and concern is given to the balance in nature. For this reason, this dimension is subdivided into the concept of sustainability.

Sustainability – This patent emphasizes the issue of sustainability as an element related to the preservation of the oceans, an archipelago of 9 islands with a giant maritime fauna, all this association between sport and nature makes perfect sense for the balance of nature. One of the experts' states that:

...As a rule, the SURF practitioner is a person with a strong connection to nature and increasingly with concerns about sustainability. A region that promotes nature and sustainability will captivate this specific group. Surfing can and should be considered one of the types of nature tourism due to its characteristics. It is not an aggressive and mass sport. The image of the Azores is one of stunning and well-kept nature.

The Azores are still a less popular destination in terms of surfing, and this is the biggest advantage that exists in relation to other destinations and thus competing for a Surf destination based on the sustainability of the environment. There are many places to explore, whether beaches or just places where it is possible to surf in waves to discover and explore and with a varied range for all levels of practitioners. The factor of natural beauty where these waves break is undoubtedly the main attraction for many travellers looking for the Azores to surf. Warm water not tropical and few people are unique features to maintain the sustainability of the destination's ecosystem.

4.2. Surfing

As Surfing is an activity that seems very much in accordance with nature, without destroying it, it is still important to know the conditions for the practice.

Conditions for Practice – If, on the one hand, when talking about nature, the theme of sustainability is expressed, when referring to practice, there are some impediments that make it difficult to balance practice and organization. In addition to the instability of the weather, surf operators also operate in a more anarchic way, such as surf schools operating without licenses, the lack of offer aimed (directly) at the traveller (surf) and the need for operator certification to improve the offer.

The biggest advantage is the small number of surfers who are in the water, something increasingly rare in the world. However, the offer is very centralized in São Miguel, with little emphasis on the other islands and where there are unique conditions for surfing. The testimonies about the unique conditions for the practice continue:

...Variety of waves and the ease of most of them for the practice and during a good part of the year, sea water with optimal temperatures for the practice.

...The Azores are still a little or almost no mass destination in terms of surfing and therefore this is the biggest advantage that exists over other destinations. Then there are still many waves to discover and surf, there is a range of waves for all levels of practitioners and finally there is the factor of natural beauty where these waves break....

Surfing is increasingly a tool used to promote destinations, as the association of lifestyle with destinations makes them cool. It serves an age group from 8 to 65 years and is part of the image of Portugal and the Azores.

Surfers, as a rule, appreciate nature and good food, factors that are more than present in the Azores. It has a very specific climate, which does not guarantee a strong season for surfing, as do other destinations. September and October are the only months guaranteed. The remaining months are always for questioning, sometimes leading to the difficult choice of when to go on vacation. The climate is uncertain, it is difficult to predict the sea conditions as it is an archipelago in the middle of the Atlantic Ocean.

4.3. Azores as a Destination

Destination issues imply the study of other markets in relation to trends as well as the appreciation of demand.

Issuing Markets – The World Surfing Championship put the Azores on the map. Interviewers advocate the creation of an application that can locate the best waves on the Islands and the best times of the year to surf. They also defend the promotion of surf leveraged in tourism, on their electronic platforms and at events. Tourism promotion implies segmenting the offer considering that in the European winter, surfers usually look for "warm" destinations, which is why the Azores are potentially attractive.

The Azores are alternatives to Hawaii and Latin America and obviously complementary to the Canaries, Madeira, and mainland Portugal. The summer in Europe and in the United States of America are focused on families looking for a more complete experience where the nature of the Azores and gastronomy play a key role.

The Azores, due to the high number of international surfing events, have gained notoriety and recognition for quality waves, a paradisiacal place in the Atlantic/Europe, where the variety of waves, water temperature and non-massification are value propositions that contribute to the destination sustainability.

4.4. Strategic Factors

The strategic elements are those that will be able to assess the need for planning, development of tourist practices and the development of their products. It is therefore necessary to develop a culture closely linked to tourist practice and the use of tourist products.

The Surfing Culture – For all the interviewees, the notion remains that the institutions still do not see surf as a strong promotion tool. Institutions are very restricted throughout the archipelago except for São Miguel. Surf is only protected in one Institution - the Federation. The community still does not recognize the destination as a high level and, therefore, there is still no relationship that allows the link between destination and sport. It is also necessary to involve the surfing community in promoting the destination.

The National Association of Surfers (NAS) represents the main national surfers, and enters a logic of promoting competition, promoting the training of champions and their preparation for international careers. The main activity of NAS is the organization of the main national competition platform in Portugal, the MEO Surf League, which awards the maximum titles of national champion (male and female) and is characterized by the vision and values common to the surfing, concern for the environment, respect for nature and sustainability. It is imperative to dictate the same guidelines that Turismo de Portugal implemented on the Continent and with visible results.

As a guideline, travel agencies should create tour packages including surfboards and airlines must adopt fair and balanced policies so that it is not perceived as a barrier to entry in the destination formation process (Surf). Change the nomenclature from surf to *surfing*, since it is the international designation for the modalities that integrate it. The change in designation helps to increase the spectrum of the modality, expanding the target audience. We close the issue of dimensions with three statements that can contribute to improve the tourist product leveraged in surf:

...It still doesn't look properly as a strong tool for tourist promotion, as the continent already does.

...Airlines must adopt fair and balanced policies so that the transport of a surfboard package is not perceived as a barrier to entry in the process of shaping a surfing destination. ...Promoting the region to the surfing community that still does not recognize it as a top world destination for surfing and that is why there is still no direct association between the destination and the sport.

Considering the dimensions described above, extracted from the interviews, it is possible to reconstruct a narrative that helps to build a strategic reference for the region. It was also possible to reference a set of keywords such as: Azores - Nature - Safety - Hot Water - Destination - Waves of quality - Family - Potential Destination - Low offer - Unstable Meteorology - Surf Camp - Training - Sustainability - Organization - Values - Tourist Package - Policies - Transport - Airlines - Surfing.

It is true that some of the words identified above are already an integral part of the Strategic and Marketing Plan for Tourism in the Azores, others deserve reflection and inclusion in future strategic documents that aim to increase the dynamics of surfing in the region.

The analysis of the interviews makes it possible to identify weaknesses but also opportunities that can be leveraged. Some tour operators and surf schools operate without rules, as well as there is a greater need to ensure sustainable operation with the focus on improving the tourist offer regarding surfing.

Paradisiacal location, surfing and family and the relationship between man/nature, according to the interviewees, should be distinctive variables of surfing in the tourist offer of the Azores and in its institutional and marketing communication. Similarly, preservation linked to the idea of a *premium, niche* product, unlike the more widespread supply on the continent, should also be considered according to the responses of experts.

If on the one hand the values of the ARA, appeal to preservation, tourism promotion institutions still do not look to surfing as a serious and consistent offer, just as expected from the local surfing community greater proactivity.

5. Conclusions

The aim of this article is to develop a strategic framework based on the opinion of experts and surfing professionals and that can support future regional strategic plans with a strong focus on the surf product. The growth and importance of surfing, with its inclusion in international competitions, along with the sustainability of the region, has allowed a greater development and recognition of the potential of the Azores for the practice of this sport.

According to the results produced by the interviews, it is possible to draw important conclusions, which allow us to perceive that there is still no promotional integrated structure on surfing in the Azores. After interviewing, it was concluded that the surf product does not have the necessary support from the institutions, that surfing is not integrated into the tourist supply, because surfing is not promoted in a sustained way, and tour operators are unable to influence the activity.

There is a path to be followed for the creation of a strategic reference for ARA. Thus, it is possible to combine the need to build a strategy to attract a destination based on the segmentation of needs, and on the choice of the target audience that identifies the product and

the destination. It is also important to identify the competitive advantages that surf offers, creating the image desired by consumers. Once the surf brand is strategically positioned, it will then be necessary to build a communication strategy based on services, with the right price and in the main distribution channels.

As mentioned by experts, surfing is not properly integrated into the tourist supply in the Autonomous Region of the Azores. As they also mention, in mainland Portugal it is a whole other reality, and it would be possible for the Azores to reach the same degree of notoriety. Leaving surfing out of an integrated tourist supply, the results are exactly the ones narrated by the interviewees. There is a need to build a framework that allows improving the reputation of the Azores as a typical surfing destination and with an activity that goes beyond the classic seasonality. The niche should be developed to create habituation and notoriety.

Although the experts who were interviewed are people with a lot of experience in surfing, being themselves lovers of surf, nature, and the Azores, it would be equally important to collect testimonials from the main tourist agents and institutional entities in the region. Thus, it would have been possible to corroborate the opinions of specialists and clarify the reasons why the Azores as a tourist destination, cannot have the same notoriety as destinations such as those on the mainland.

Clearly, air transport presents itself as a blemish as travelers are heavily dependent on planes and thus their expenses increase. An interesting proposal for future research will be to measure the impact of air transport on the growth of surfing in the Azores.

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