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## Research Paper

## Exploring the economic significance of the surf tourism market by experience level

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## ABSTRACT

Although it has increased in popularity, surfing as a form of active sport tourism has received little attention in relation to its economic impact. The purpose of this paper is to explore the economic significance of the surf tourism market and examine any differences in spending based on surfer experience level. A longitudinal survey yielded 706 completed surveys for analysis. Descriptive and ANOVA statistics revealed that, as a niche tourism group, surfers bring economic benefits to a destination and that there are differences between surfers based on the number of years spent surfing. Surfers typically travel in groups of two to four people and were most likely to be repeat visitors to the destination. In addition, this group spends money on a year-round basis. As surfers gain experience in their sport they are also more likely to travel more frequently and spend more money per day.

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## 1. Introduction

Destination managers are responsible for guiding efforts to grow tourism as an economic activity (Morrison, 2013). Within this role, destination managers are tasked with identifying market segments with growth potential, as well as planning, monitoring, and evaluating outcomes of tourism-development efforts (Morrison, 2013). Sport tourism, which refers to traveling for the purpose of participating or observing a sport, is a niche market segment recognized to stimulate economic benefits in host destinations, largely through visitor expenditure (Ritchie & Adair, 2002). The significant revenue generated from this niche has received much attention from the academic community, and there is a plethora of research on sport tourism that largely focuses on event sport tourism and large-scale spectator sports (Hinch & Higham, 2011). While noteworthy, other markets in this niche remain relatively unexplored and there has been a recognized need for further research on additional forms of active sport tourism (Kurtzman & Zauhar, 1995): in particular the expenditures and spending behaviors of participants (Gibson, 1998).

One form of active sport tourism that has received little attention in relation to its economic impact is surfing. Initially perceived as a low-capital leisure activity (Martin & Assenov, 2012), the global estimated worth of the surfing industry is reported to

be US\$8 billion (Dolnicar & Fluker, 2003a). Surf tourism is the fastest growing sector in the surfing industry (Warshaw, 2004) and, in recent years, surfing has increased significantly in popularity: in 2002 the global surfing population was estimated at 10 million surfers (Buckley, 2002) and by 2007 this had increased to 20 million surfers (Lazarow, 2007). It is estimated participation grows 12–16% per year (Buckley, 2002). In conjunction with the increase of surfers, the number of surfing destinations has also grown. In 1997, surfing was practiced in 72 countries (Martin & Assenov, 2012) and by 2015 this had risen to 164 countries, including over 9000 specific destinations (Wannasurf, 2013). Yet, despite this growth, surfing remains one of the most understudied niche markets in sport tourism (Markrich, 1988). Current research on surf tourism highlights the significant expenditures of surfers, as well as their non-surfer travel companions, but suggests there might be variations in spending patterns based on wave preference, or the number of years of participation in the sport. Due to the lack of research on surfer travelers, and their economic potential to a destination, the purpose of this paper is to explore the economic impact of surfer travelers and examine any differences in spending based on their experience level with the sport.

## 2. Literature review

## 2.1. Profile of surfers and their expenditure

The first investigation on the economic significance of surfing focused on a surfer's expenditure on equipment (Kelly, 1973).

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Studies examining the economic significance of surfing as a leisure activity (Johnson & Orbach, 1986), and the integral role the sport can have on a destination's economy in relation to tourism (Markrich, 1988), followed over a decade later with a focus on Hawaii. Since then, destination planners at popular surfing destinations and coastal towns have acknowledged the role of surfing on a destination's economy (Lazarow, 2009; Markrich, 1988), its economic impact, and investigated surfing and surf-related events (Hawaii Coastal Zone Management, 2016). While this research has provided valuable insights into a potentially lucrative market, it concentrates only on a few destinations and there are noticeable gaps in the knowledge on surfers in other destinations (Martin & Assenov, 2012) and on specific sectors in the surf tourism market (Dolnicar & Fluker, 2003b). At present, only 10% of countries where surfing is a popular activity have been studied, with peer-reviewed research on surf tourism only conducted in 18 countries (Martin & Assenov, 2012). Most of the research has been in Australia, the United States, and Indonesia, with Indonesia the most-researched destination (Martin & Assenov, 2012).

One reason why surf tourism may not have had much academic attention is because surfing is sometimes viewed as a sport participated in at places where people live, rather than at places people visit (Lazarow, Miller, & Blackwell, 2008), or that surfing is perceived as a recreational pastime (Lazarow, Miller, & Blackwell, 2007). Perhaps, it is due to the ambiguity of surfing as a 'legitimate' sport or that surfing is concentrated in only a few areas (Buckley, 2002; Polzat-Newcomb, 1999). Alternatively, surfing may not have received academic attention because of the laid-back characteristics or negative stigma attached to the surfing community (Nelson, Pendleton, & Vaughn, 2007). Historically, the surf culture was associated with drug use and political apathy (Wolfe, 1968). For example, Farmer (1992) interviewed surf shop managers to examine surf culture and the motivations and values of surfers. He found surfers were classified as either *rowdy party goers*, *beach bums* who made surfing a lifestyle and did little else with their lives, *school boys* who moved to California with the intention of studying but decided instead to surf or, lastly, *weekend warriors* who worked during the week and surfed on weekends. Indeed, the older stereotypes attached to surfers were being young, uneducated, and unmotivated (Johnson & Orbach, 1986). Over time, this stigma has been challenged and current studies that profile surfers suggest they are more complex than initially perceived.

In the United States, research on domestic surf tourists visiting Trestles Beach, California, revealed this group was well educated (42% had a college degree), earned a high wage (41% earned \$80,000 or more), and worked full time (72%) (Nelson et al., 2007). Similarly, study participants from an Australian surf travel company were on average 30 years old and reported a relatively high weekly income between AU\$600–\$1499 (US\$450–1125) (Dolnicar & Fluker, 2003a). Lastly, surfers on the Gold Coast, Australia, were found to hold bachelor's degrees (25%), or postgraduate qualifications (13%), and employed full-time with above-average salaries (Lazarow, 2009). These high incomes were reflected in surfer's spending patterns.

Surfers surveyed at Trestles, California traveled an average of 56 miles from surrounding areas within Los Angeles, Orange County, Huntington Beach, and San Diego. Their average expenditure per person per visit was US\$40, which was higher than beachgoers to the area, recorded at US\$25 (Hanemann et al., 2004). The authors estimated, based on the number of visits to the area and the average expenditure, that surfers contributed US\$4.2 million towards the local economy in 2006 (Nelson et al., 2007). The majority of expenditures were at local restaurants, shops, gas stations, and beach-related stores.

An economic study on surfers in Australia (Lazarow et al., 2007)

looked at the average amount of money surf tourists spent per year on each visit, based on two surfing locations. The average expenditure at one destination, South Stradbroke Island, was AU \$4365, (US\$3273) and the average expenditure at the second destination, Bastion Point, was AU\$4397 (US\$3297) (Lazarow et al., 2007). The surfers on the Gold Coast, Australia, were estimated to spend AU\$1000 (US\$750) on domestic surfing endeavors on purchases of fuel and food (Lazarow, 2009), and approximately AU \$3000 (US\$2250) for trips over 500 km (311 miles) (Lazarow, 2009). This included accommodation, travel, food, and fuel.

Some destinations have examined the importance of surfing to the economy. For example, the Costa Rican government found during the first months of 2006 it had over 100,000 inbound tourists arriving to surf, staying an average of 17 days and spending an average of US\$2074 (Lazarow et al., 2008). It has been suggested that surfing-related activities make up approximately 25% of the Costa Rican economy. South Stradbroke Island in Australia estimated 11,500 surfers visited 64,000 times per year between 2005 and 2006, for the primary purpose of surfing, contributing an estimated AU\$20 million (US\$14.9 million) to the economy (Lazarow et al., 2008).

## 2.2. Influence of experience on expenditure

Few studies have examined differences in spending habits, travel patterns, and wave preference of surf tourists based on the number of years spent in the sport. The majority of surfers at Trestles Beach, California, who spent US\$40 per visit, classified their skill level as advanced (84%) and had an average of 19.7 years of experience (Nelson et al., 2007). They were also frequent visitors to the area (travelers visiting from outside the city averaged 83 visits per year), largely due to the high quality of the surf breaks (Nelson et al., 2007). Dolnicar & Fluker (2003a) study of surf tourists visiting popular surfing destinations in Australasia and the Americas found that while the majority of surfers (60%) preferred waves 4–6 feet and 6–8 feet (27%), there was a significant correlation between wave preference and length of stay. Surfers who preferred more challenging waves (hollow), visited a destination for an average of 5–8 weeks compared to a four-week average visit by surfers who preferred fun breaks with a lower level of risk. The authors found surfers with longer lengths of stay spent a similar amount compared to surfers staying shorter periods. This suggests that experienced surfers have limited involvement with the tourism industry and only use air and ground transportation services. Overall, the authors found no significant difference in surfer level of education, income, or number of travel companions.

To further examine spending and travel preferences Dolnicar & Fluker (2003b) clustered surfers according to differences in spending habits. Their designated groups were: *price-conscious safety seekers*, the oldest age group with many years of surfing experience and the highest level of income; *luxury surfers*, individuals seeking superior accommodation, food, and safety; *price-conscious adventurers* who were individuals with advanced surfing skills, and placed an importance on health and safety, as well as reliable tourism providers; *ambivalent surfers*, for whom nothing seemed overly important; and *radical adventurers* youngest age group with the lowest level of income, but advanced surfing skills. The two groups that reported the highest willingness to spend per day were the price conscious adventurers and the luxury surfers. These two groups also had the highest reported income and the most advanced surfing skills. In addition, these two groups had the highest average age, ranging between 32–35 years. The main difference between the two clusters was that the price-conscious adventurers were likely to return to a favorite spot, while luxury surfers sought new destinations.

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