

Surf tourism from Europe

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Surf tourism is a growing market, consisting of wave surfing, wind surfing and kite surfing. Europe is an important source market, with especially good opportunities in western European countries. Good surf conditions are key, and the waters should not be too crowded. The popularity of surfing is set to rise further, as women are becoming increasingly interested. Wave pools are making surfing accessible inland as well, while the Olympics provide additional exposure.

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1. Product description

Surf tourism refers to trips where surfing is the main purpose. It is considered a form of adventure tourism. Surfing includes wave surfing, wind surfing and kite surfing. Although these are separate sports, many surfers practise more than one type of surfing. For example, windsurfers may go wave surfing when there is no wind. As surf gear is cheaper than it was a decade ago, it has become more affordable for surfers to own equipment for different types of surfing.

Health and safety measures

When European tour operators and travellers consider new destinations, they first check the safety. Vehicles, equipment, and accommodation also have to be safe. Many European surf travellers expect surf tourism providers to be able to provide surf equipment, as it can be expensive to transport your own equipment by plane. They need, for example, boards in different sizes, kites and wetsuits. This equipment needs to be reliable and of good quality.

Tips:

- Pay attention to safety measures. Tour operators should regularly check vehicles and equipment, for example. Accommodation establishments should have safety measures in place, such as smoke detectors, fire extinguishers, emergency exits, first-aid kits and 24-hour medical assistance.
- Show the outcomes of safety checks and licences to your clients.
- Provide surf equipment, either yourself or via a reliable partner. Also emphasise the availability of surf equipment on your website.
- Maintain high standards in the use of equipment and train staff regularly on safety and maintenance.

Political stability

Safety is important to European travellers, especially because some developing countries are politically unstable. Most commercial tour operators do not offer holidays to countries that their Ministry of Foreign Affairs has declared unsafe. This has previously led to a drop in tourism arrivals in countries such as Mali, Egypt and Kenya.

Tips:

- Keep (potential) customers updated on changes in the safety situation in your area, for example via your website and staff. Be open and honest in your communication on which areas are safe, or where safety might be an issue. Your client has plenty of information sources, too.
- Share safety experiences from customers on your website. Let them write about how safe they felt, because people value the experience of other travellers.
- If your region is “unsafe”, commercial tour operators will probably not go there. In this case, focus on volunteer organisations and individual travellers. Check your country’s current safety status on the Ministry of Foreign Affairs website of your target countries, such as [Ireland](#) and the [United Kingdom](#).

Good surf conditions

Having good surf conditions is one of the most important requirements when choosing a surf destination. The kind of surfers you can attract depends on factors that you cannot influence: weather, water, temperature, tides and break. In general, good surf conditions are 4–8 foot waves (1–3 metres) for wave surfing, or winds of 15 knots or more for wind surfing, and 10–15 knots or more for kite surfing.

Tips:

- Mention as many specifications of your surf destination on your website as possible. Include information about your local weather, currents, tide, reefs, wind, water and land temperature, for example. No known conditions means no business!
- Be aware of the seasonal differences and inform your customers about the conditions of your surf locations throughout the year.

Not too crowded, accessible beaches

Surfers need space both in the water and on the beach, so surf sites should not be crowded. This can be a problem for surf destinations, because the more popular and crowded they become, the less attractive they are. At the best spots, advanced surfers informally queue for waves. Because surfers carry large and often heavy equipment, beaches need to be accessible. Remote beaches may appeal to passionate surfers who like to keep their locations quiet.

Tips:

- See what you can do to avoid big crowds. Find alternative waters close to your destination, for example by making a secluded beach easier to reach. Some popular surf destinations have limited the use of their best surf spots to paying customers.
- Ensure the accessibility of your beaches. Keep in mind that surfers have to carry large and heavy equipment to the water.

Natural environment and sustainability

Surfing is an activity in close contact with nature. This makes surfers particularly aware of their natural environment and its preservation. An attractive surf destination should have a healthy marine environment. Sustainability is important to surf travellers. A surf site that is not managed sustainably will deteriorate and become unattractive for surfing. Organisations like [Surfrider Foundation](#), [Save the Waves Coalition](#) and [Surfers against Sewage](#) organise various campaigns.

Tips:

- Incorporate sustainable and environmentally friendly practices, for example by introducing a towel reuse programme, installing water-saving taps and showers, working with local products, or using solar power and/or solar cookers.
- Give tourists information on how to behave responsibly towards the local environment and culture, for example by using less water, energy or paper towels. For inspiration, see wikiHow's [How to Create a Green Hotel](#) and Global Stewards' [tips for green accommodation](#).
- Organise sustainable activities your guests can participate in, such as a beach or reef clean-up.
- For more information and best practices, see the [UNESCO World Heritage Sustainable Tourism Toolkit](#). In addition, see our study about [the need for sustainable suppliers](#).

Local culture and food

Surf travellers are often interested in the local culture of a surf destination. They enjoy the authenticity of the destination and its culture, and like to get a taste of the local food. Ambience matters. For example, good quality local food served from a beach hut will have more appeal than a large café from a big chain.

Tips:

- Emphasise the authenticity of your destination. Show that you have more to offer than a good wave or the perfect breeze.
- Serve local food and/or recommend places that serve traditional dishes in an authentic atmosphere.

Traveller profile

Contrary to the stereotype, the average surf traveller is in their (early) 30s, well-educated and high-spending. Although the majority are men, women surf too. In addition, most surfers travel in groups of family and/or friends that include women.

Leisure surfers

Leisure surf travellers like to combine surfing with non-surfing activities, usually in a warm climate. They prefer small-scale accommodation, but sometimes also stay at a resort. Leisure surf travellers care about comfort, culture, good-quality food and alternative day trips. They are often sporty and like to try other (water) sports. This segment offers good opportunities for surf schools, as these surfers are often interested in some lessons. They usually do not bring their own boards.

Tips:

- To target the leisure surfer segment, provide good quality equipment as well as an attractive non-surfing programme.
- Offer a full-range package, including surf tuition, accommodation and additional activities.

Passionate surfers

For passionate surfers, surfing itself is the main reason to go on a holiday. They are often looking for specific waves (e.g. regarding height and currents). The more waves, the better, but passionate surfers do not like crowds. This also means these surfers are often pioneers that kick-start tourism to previously (relatively) unknown destinations.

The standard of their accommodation is not that important to passionate surfers. Their basic needs consist of a clean room, good basic food, a hot shower and nice staff. These experienced surfers usually bring their own equipment, for which they require a safe storage place.

Tips:

- To target the passionate surfer segment, focus your communication on the quality and uniqueness of your surf spots. Consider letting a surfer write the content of your website so that you speak the same language as your target customers.
- Provide information on [surf equipment transport guidelines of airlines](#).
- Offer lockable storage for your guests' surfing equipment, such as boards, sails and wetsuits.

Professional surfers

Professional surfers compete in elite surfing competitions around the world. They are attracted to a destination by major competition events. Good infrastructure is vital. Although this segment is very small, they are market leaders that attract other surf travellers and spectators to a destination.

Tips:

- Research if your destination is suitable for surf events and competitions.
- Approach sponsors of professional surfers and invite them on a trip to your surf destination. Ask them what a destination needs to attract such events and competitions.

Small groups

Many surfers travel with a partner, family or (two to four) friends. Small group bookings therefore are a large part of the surf tourism market. Often there is one enthusiastic surfer in the group and one that likes to surf only once or twice, or who does not surf at all. These groups are generally willing to spend more on the quality of holiday elements such as accommodation and additional activities. This does not have to mean luxury, but a higher standard than budget options.

Tips:

- When targeting this segment, make sure you focus on quality of the overall package.
- Take into account the needs of non-surfers, for example accommodation with more leisure facilities, such as spas or yoga classes.
- Offer lessons and rental gear for less experienced surfers and/or children in the group.

2. Which European markets offer opportunities for surf tourism?

Europe is a leading market for adventure travel

Europe is a key source market for adventure tourism, as most international departures are from Europe and the Americas. Adventure tourism is a large and growing market. The ATTA estimates [the international adventure travel market can be valued conservatively at €580 billion in 2017](#), with an average annual growth rate of 21% since 2012. Wind and wave surfing are increasingly popular types of soft adventure travel, while kite surfing appeals to hard adventurers.

The market for surf tourism is growing

Wave surfing is the largest segment within surfing. This type of surfing is generally considered one of the fastest growing sports in the world. Estimates of the actual market size vary. In 2012 the ISA reckoned that [35 million people surf worldwide, which may rise to 50 million by 2020](#). Some 4.5 million (around 13%) of these surfers are estimated to be European. Although many think these numbers are somewhat inflated, they present a general idea of the market share and development.

[In 2012 there were 1.5 million kite surfers worldwide](#), which is the most recent evaluation of the market. The general consensus is that the number of kite surfers has increased considerably since then, reaching several millions. There are no reliable figures about windsurfing. Industry experts indicate that this market is smaller than wave surfing, but larger than kite surfing. As windsurfing is becoming less popular, kite surfing may catch up in the coming years.

Some believe that surfing is following the path of skiing. As destinations may set up surfing resorts that specifically cater to less adventurous surfers, it will become more accessible in the future. For 2017, [Pinterest noted an impressive 260% increase in interest in surf classes](#).

Western European countries are the largest source markets

Although exact numbers are scarce, [the United Kingdom is considered Europe's largest market for surf tourism with an estimated 500 thousand wave surfers](#). France follows closely with 450 thousand surfers, [while Germany's surfing population is estimated at 420 thousand](#). Surfing is also popular in countries like Spain and Portugal, which are home to some of Europe's favourite surf spots.

Tip:

- Study your options in large surf tourism markets, such as the United Kingdom, France and Germany.

For statistics on European source markets, see our study about [European demand for tourism in developing countries](#).

3. What trends offer opportunities on the European market for surf tourism?

Surfing on the rise among women

While surfing used to be a predominantly male domain, the sport is becoming increasingly popular among women. [In the 1990s around 3-5% of surfers were women](#), but nowadays estimates vary between [one fifth](#) and [one third](#) of the world's surfing population. Surf-wear companies are developing gear for women, including wetsuits and specially designed surf bikinis for warmer waters. Of course men and women can surf together, but many destinations now also offer [surfing camps for women](#).

Tips:

- Include women in your promotion. For example, do not just use photos of male surfers.
- Offer classes and/or camps for women, as well as women's surf gear.
- Promote your surf packages and facilities for women in (online) magazines like [SurfGirl](#).

Surfing and wellness

[Wellness tourism is a growing segment within global tourism](#), accounting for 6.5% of the market. Travellers are considerably increasing their spending on wellness. [Wellness tourism revenues grew more than twice as fast as for overall tourism](#), with 14% between 2013 and 2015. They are projected to grow another 38% by 2020.

Surfing is a great way to both relax and keep fit, making it a perfect fit with wellness travel. [Combining surfing with wellness is increasingly popular](#), with surf resorts adding wellness experiences and beach wellness resorts offering surf classes. This is ideal for both surfers and their non-surfing companions.

Tips:

- Offer optional (inner) wellness experiences, such as massage sessions and yoga classes on the beach.
- For more information, see our studies on [inner wellness tourism\[A1\]](#) and [physical wellness tourism](#).

Surfing wave pools

Another interesting development is the increasing popularity of [surfing wave pools](#), simulating ocean waves at various levels. This so-called "simulated surfing" provides people who do not live near the water a great opportunity to surf or learn how to do so. In addition to several outdoor wave pools, indoor wave pools are also being installed across Europe. This type of indoor pool allows surfers to ride the waves in any season, regardless of the weather.

Tip:

- Study your options to cooperate with European wave pools and promote your surf holidays with their customers.

Surfing at the Olympics

Windsurfing has been an Olympic sport since 1984 for men, and 1992 for women. The exposure the Olympics provide can boost the popularity of the sport, particularly in the winners' countries. This effect was clear in the

Netherlands after Dutch windsurfer Dorian van Rijsselberghe won Olympic gold in 2012 and 2016. With wave surfing making its debut at the 2020 Olympics and kite surfing in 2024, they are also set to benefit from the increased attention the Olympic Games bring.

Tip:

- Follow the surfing events at the Olympics and consider some extra promotion in the countries of the biggest names in the game.

Mobile surfing applications

Mobile applications (apps) have also reached the world of surfing. The most popular apps are practical in nature, providing for example a logbook feature, weather and wave forecasts or tide tables.

Tips:

- For an overview of popular apps, see for example recommendations by [LushPalm](#) and [tripaneer](#).
- Inform your guests about the best surfing apps for your area.
- If popular surf applications do not cover your destination, study the options to have your surf site(s) included.

Increasing use of online research

European travellers increasingly research and plan their trip online. To gather information and share experiences they use:

- peer review sites, like [TripAdvisor](#) and [Zoover](#)
- travel forums, like Lonely Planet's [Thorn Tree forum](#)
- social media, like [Instagram](#), [Facebook](#), [Twitter](#) and [YouTube](#)

Online research is a trend that has increased exponentially over the past years. Although growth has peaked, the use of internet to research tourism will continue to increase. It is predicted to remain the most important research channel for years to come.

Tips:

- Maintain a strong internet presence and online marketing strategy, including social media.
- Use photos and videos to bring your story alive. For more information, watch this [webinar series on visual communication in adventure travel](#) by ATTA and Libris.
- Use current customers as ambassadors for your company and area. Encourage them to share their experiences and visuals on social media, write blogs and review your company.
- For more information, see our [10 tips for online success with your tourism company](#).

Older windsurfers

Although the popularity of windsurfing may be declining in favour of wave and kite surfing, there is potential among older generations. Windsurfing is a relatively accessible type of surfing, perceived as being safer. This makes it an increasingly popular sport among people aged 50+. These older windsurfers may have picked up the sport later in life, rediscovered it recently, or have kept up since windsurfing's heyday. The aging, yet

relatively fit European population makes this a promising trend.

Tips:

- Consider offering surf classes for older travellers.
- For more information, see our study about [senior travel](#).

For more information, see our study about [European tourism market trends](#).

4. What requirements should surf tourism comply with to be allowed on the European market?

For general tourism requirements, see our study on [what requirements your services should comply with to attract European tourists](#).

There are some voluntary safety standards for adventure tourism, which are relevant for surf tourism in particular as well.

Voluntary safety standards

Safety is extremely important for adventure tourism. Three international ISO (International Organization for Standardization) standards support safe practices in adventure tourism: [21101](#), [21102](#) and [21103](#). Additionally, some countries have their own voluntary standards, such as [BS 8848](#) in the United Kingdom.

Tips:

- Study the ISO standards on adventure tourism. Use them to enhance your safety performance.
- Check for possible voluntary standards in your target markets.

5. What competition do you face on the European surf tourism market?

Some of the most popular destinations for surf tourism are in coastal developing countries.

Particularly popular destinations include:

- Costa Rica
- Indonesia
- Morocco
- Nicaragua
- Philippines
- South Africa.

As European surfers are looking for the empty wave, they increasingly find it in developing countries. There are good opportunities for destinations that offer good surf conditions and privacy, such as Ghana, Ivory Coast and Senegal. Surfers are often the first to travel to remote locations. When they come back, they share their experience with friends, family and/or online (surfing) communities. This may attract other surfers to the area and also stimulate non-surfing tourists to visit.

Tip:

- In your marketing message, emphasise the unique elements of your surfing offer that travellers cannot find in competing countries.

6. Which channels can you use to market your surf tourism products in Europe?

Selecting smaller specialised tour operators

Tour operators are the most important trade channel. Smaller European tour operators specialised in surf tourism or your destination offer the best opportunities.

You can identify relevant tour operators via trade associations, events and databases, such as:

- [Adventure Travel Show](#) – annual adventure tourism trade event, January, London
- [Adventure Travel Trade Association \(ATTA\)](#) – global trade organisation for the adventure travel industry that organises the Adventure Travel World Summit ([search for members](#))
- [Beach and Boat](#) – annual water sports and tourism exhibition, February, Leipzig
- [Boot Düsseldorf](#) – annual water sports trade event with a dedicated [board sports area](#), January, Düsseldorf
- [ITB](#) – annual tourism trade event, March, Berlin
- [Wanderlust](#) – magazine for adventurous, authentic travel (browse their [tour operator directory](#))
- [World Travel Market](#) – annual tourism trade event, November, London.

Examples of tour operators specialised in surf tourism are [Destination Surf](#) (France), [Surfholidays](#) (Ireland and United Kingdom) and [The Perfect Wave](#) (Europe).

Generating direct sales

European surfers increasingly book their holidays directly with service providers at the destination. To increase your chances of direct sales, you can promote your product on surf (tourism) websites/portals, such as:

- [Lush Palm](#)
- [Magic Seaweed](#)
- [SurfGirl](#).

You should focus on the surfing market itself and, as surfing is a specialised market that mainly attracts people that are actively looking for surf holidays.

7. What are the end-market prices for surf tourism products?

Travellers have many destinations and types of holiday to choose from. This makes tourism a relatively price-sensitive and competitive industry. The price of a long-haul trip consists of three dimensions:

1. The exchange rate between the currencies of the country of origin and the destination country.
2. The costs of transport to and from the destination country.
3. The price of goods and services the traveller consumes in the destination country.

European tour operators are not open about the purchasing prices of their tourism products. According to industry experts, their margins vary between 10–25%. Prices of holiday packages vary widely as they depend on a lot of factors, such as:

- availability
- destination
- modes of transport
- period of travel
- number of travellers
- length of stay
- type of accommodation
- included activities.

Tips:

- Check which countries have cheap (direct) flights to your destination, for instance at [Skyscanner](#). This gives you a competitive advantage in those countries.
- You can compare prices for surf travel products via portals like [Surf'inn](#).
- Tourism Council WA has some useful [online tools for pricing tours and accommodation](#). These help you determine the break-even point and ideal retail price of your tourism product.

Please review our [market information disclaimer](#).