
*An Examination of the United Kingdom Surfing Market:
With proposed new surfing products for the UK market*

Robyn Ward
Queen Margaret University of Edinburgh
Edinburgh, Scotland

Abstract

The purpose of this dissertation is to examine the United Kingdom surfing market and determine:

- a) Is it simply an extension of the existing international market or does it have unique characteristics that differentiate it?
- b) If it is a distinct market how and why?
- c) Based on the answers to the second question, how can the market opportunity be exploited?

The answer is that it is a distinct sub market based on the extremely harsh climatic conditions, and this does in some ways differentiate it from the parent surfing market, but there are many similarities. Surfers are a unique subculture that is similar the world over. Surfing is an extreme sport that attracts participants of a particular psychological profile. This profile, that stresses individuality and internalization of values, is constant from the sunny sand beaches of California to the frigid rocky shores of Ireland.

The growing popularity of surfing in the United Kingdom, and throughout Europe does offer market opportunities. There are also particular equipment requirements for surfers in northern climates that offer further opportunities. Because the ability to survive in North Atlantic waters for more than a few minutes at a time, let alone enjoy them, requires specialized and relatively expensive equipment. Because the best surfing areas are remote, there are also opportunities in such areas as hospitality.

There has been no real effort to produce specialized equipment for the UK market. The research for this dissertation indicates a few special items such as head and face protection do seem to offer opportunities.

Acknowledgements

I would like to firstly thank my parents for their continual support and financial backing over the past years, who have undoubtedly made all of this possible. I would like to thank Christine Wilson for making my life that bit easier over the past 4 years and Richard Kerley for his professional advice and guidance throughout my final year.

I would like to acknowledge Dr. Snake Gabrielson for providing me with a stunningly captivated photograph for my front cover.

I would also like to thank my close friends from home and flat mates Mark and Steven for sharing this experience with me over the past 4 years.

I would like to thank all of those in the surfing community who have spared time to give their opinions to me again and again on relentless occasions.

I would lastly like to remember Chris “Spud” Davidson, a close friend and all round great guy, who would have taken great pleasure in seeing me get to this stage, but sadly passed away last year.

List of Tables and figures

Figure 3.1: Flow chart.....	17
Table 3.1: Research advantages.....	19
Table 4.1: UK Demographics Census 2001.....	34
Table 4.2: Tabulation of results.....	40
Figure 6.1: Adapted Porter’s 5 forces model.....	44

Table of Contents

Abstract.....	i
Acknowledgements.....	iii
List of Tables and figures.....	iv
Table of contents.....	v
1.0 Chapter 1 – Introduction	1
1.1 Background	1
1.2 Rationale	3
2.0 Chapter 2 - Literature Review	6
2.1 Introduction	6
2.2 Example companies	6
2.3 Surfing	7
2.4 Marketing	9
2.5 Psychology	10
2.6 Business	12
2.7 Research	13
2.8 Summary	14
3.0 Chapter 3 - Methodology	15
3.1 The development of the actual study	17
4.0 Chapter 4 - Findings and Results	22
4.1 Psychology	22
4.2 Marketing	33
4.3 Questionnaire results	38
4.4 Tabulation of results	40
5.0 Chapter 5 - Discussion of the market	42
6.0 Chapter 6 - Strategy	44
7.0 Chapter 7 - Conclusions and recommendations	48
7.1 Conclusions	48
7.2 Recommendations for future research	50
8.0 References	52
9.0 Bibliography	55
10.0 Appendices	57
10.1 Appendix A: Questionnaire	57

Chapter 1 – Introduction

1.1 Background

The United Kingdom, particularly Scotland, has become known as the “cold Hawaii” within the surfing community. Like many research projects, this one has taken on a life of its’ own. What started as an examination of the market place evolved, at least partially, into a marketing research project, which in turn suggested a new product, which specifically meets the wants and needs of surfers in the U.K.

For surfers based in the UK the 5 mm neoprene wetsuit is literally the greatest invention ever produced. It solves the problem of keeping warm when the waves are at their best, usually mid winter! (Visit Scotland, 2005) For most European surfers who are looking for big wave surfing, the United Kingdom, and particularly Scotland, offers the only practical alternative to the traditional tropical surfing beaches. With the latest advances in technology, it is possible for surfers to stay in cold water (1-2 degrees and colder) for up to 8 hours. With new technology, wetsuits are now thinner and more flexible. The surfer can both stay warm and move without restriction. The result is a level of comfort for surfers in cold weather and water that was never possible before. The older wetsuits allow surfers to remain in the water for little more than 45 minutes, whilst severely reducing flexibility, hence uncomfortable.

Other factors that promote surfing in the United Kingdom are more TV coverage, better weather buoy¹ resources to read wave conditions, and comfortable accommodations in prime surfing locations. As a result of the technical improvements, the civilization of accommodations in prime surfing sites and plentiful positive publicity, surfing is becoming one of the fastest growing sports in the United Kingdom.

Surfing is now a popular pastime, and lifestyle, in cold climates as well as traditional hot climates. As the background research expanded, it became clear that surfing is more than a sport; it is a way of life, a lifestyle. It represents a subculture that appeals primarily to a specific personality profile, and once entered, defines the person involved in many respects. Surfing is usually considered exclusively the realm of the young, but the same background research indicates that many surfers are middle aged or even older. The research disclosed that many “old time” surfers, that became active and well known in the sport many years ago, are still active surfers and/or involved in surfing today. While they may have converted from competing to judging competitions, the lifestyle and values of the 60’s surfers is still part of their psyche.

Surfing represents the ultimate in niche marketing. The basic market, the “surfer” for which the product is created is interested almost exclusively in utility. The secondary market, those that admire and wish to emulate, but are not part of the surfing lifestyle, will buy products that are created for

¹ Weather resource used for measuring and predicting wave pattern size and frequency. As well as keeping track of sea depths and tidal changes.

surfers, or copies of surfer garments. However, the products cannot be aimed at this secondary market even though it may be larger in money volume than the primary market. If the active surfers that they admire and wish to emulate do not buy the product, its sales will be severely limited. This does not exclude the concept of less expensive versions of quality, hence costly, products originally intended for active surfing from becoming viable consumer products.

This research will explore whether this has created new markets with different clientele.

1.2 Rationale

A company, which plans to break into a new market, needs to analyse the target market and create a strategic marketing plan. Nike's decision to move into consumer markets is a classic example. In the early 80's Nike was the first sports shoe manufacturer (primarily basketball and tennis) to present their sports shoe line to the general marketplace. They appreciated that this new market would differ from their original market, actual athletes. They expanded the product lines to include "look a likes", in addition to the top of the line "professional quality" shoes they continued to produce and sell to their original market, serious athletes. They capitalized on the mystique of sports icons to provide endorsements. They capitalized on the desire of boys, and young men to be identified as similar to their idols. Nike became a fashion statement for both young men and women, and the company succeeded in achieving the cross over from athletic shoes to a street shoe fashion style image without damaging their original professional quality market and its mystique. This is a notable achievement. With this accomplished, the "fashion house" Nike capitalized on their new image, and expanded into other garments and products. The rest is history, and Nike is a marketing powerhouse with worldwide distribution. (Nike 10K, 2005)

When the technical developments that allow surfing to be enjoyed year round in non-tropical environments, and renewed interest in surfing are viewed in concert, a new market appears in the United Kingdom. This market has yet to be fully explored or exploited. This investigation is an attempt to analyse and research the United Kingdom surfing market, so that companies wishing to enter the United Kingdom surfing market, or expand an existing presence in the market, will have a vehicle available to gain an initial awareness or point of departure regarding the market. The surfing market as a whole is well established and substantial sums of money and research effort has been invested in it. The researcher is trying to raise awareness of this new market. Can it merely be treated as an extension of the traditional established market such as California and Australia, supplied with the same products, and treated in exactly the same way? Is it, on the other hand, a specific market with its own characteristics and "wants and needs"?

The classic image associated with surfing, based in large part on Hollywood beach movies of the 1960's, is sunny beaches, gorgeous healthy people, bare bodies etc.

“The practitioners called themselves ‘surfers’ and talked much of Australia and California, often using esoteric language such as ‘dropping in’, ‘cut backs’, ‘hanging ten’, ‘big sets’, ‘Malibus’, ‘baggies’ and ‘woodies’, which required interpretation to be understood.” (British Surfing Association, 2005 p.n.a)

Surfers have even developed their own language, and members of the surfing community can identify fellow members, and even determine their level of surfing expertise based on their choice of words. It is therefore clear; that while the surfing community is made up of highly individualistic individuals for the most part there is still group interaction, levels of acceptance, image, and prestige. (Morton, 2006)

This traditional “sun baked” image does not apply to the United Kingdom surf scene due to a different climate. Rather than basking in sunlight and using suntan oil, surfers in the UK may find beaches covered in snow and use Chap Stick. Sunburn is not a serious problem; it is replaced by frostbite and hypothermia. That is why this investigation proposes that based on these climatic differences; the United Kingdom surf market may have different characteristics than the already established markets. If the United Kingdom is in fact a separate and distinct market with unique characteristics, can it be presumed that the same marketing tactics will work that are successful in California or Australia?

Chapter 2

Literature Review

2.1 Introduction

“A review of the literature is important because without it you will not acquire an understanding of your topic, of what has already been done on it, how it has been researched, and what the key issues are” (Hart, 1998 p.1)

The researcher has divided the literature review into six categories. This enables the researcher to select specific areas of research, and develop each of the main topics within the overall subject area. With this step completed it is possible to see how each area has been applied and developed. It is then possible to explore the work previously completed and try to develop new information and insight. “The use of the ideas in the literature to justify the particular approach to the topic, the selection of methods, and demonstration that this research contributes something new” (Hart, 1998 p.1)

2.2 Example companies

The objective is to provide examples of companies like Quicksilver, Rip Curl and Billabong that have experienced similar changes in their market places. The surfer's “uniform” produced a multi-million dollar surf clothing industry with companies such as Quicksilver, Rip Curl and Billabong leading the way. Extreme environments, such as those during winter on the Northeast coast of the USA, provide a model for the underlying businesses. Based on these examples, the paper explores the available approaches and strategies companies can utilize to penetrate the new market. How will these companies react to the unique climatic conditions for surfing in the United Kingdom? Will we see what amounts to Quicksilver outerwear develop in the market?

2.3 Surfing

To understand the current market opportunities it is important to gain a solid grasp of the origin of the sport, and of the traditional market. To achieve the investigation's overall aim, it is important to understand and appreciate surfing's culture and history. This basis of the sport can be compared to the new market in the UK. A thorough understanding of the current nature and status of the traditional and UK markets will be presented through the texts, as well as an examination of United Kingdom surf forums developed through examining and reviewing appropriate web sites dedicated to surfing.

There is really only one formal book on surfing revealed in research for this paper, “The Complete Surfing Guide for Coaches” by Dr. Bruce C. Gabrielson. (Gabrielson, 2006) In the preface to the web version of the book Dr. Gabrielson says,

“My book was never widely read outside of Southern California, primarily because the coaching audience at that time was so small, and because most publishers wanted books with lots of pictures rather than information.” (Gabrielson, 2006 p.n.a)

This apparently has changed little over the years. What little reference material is available is of little interest to academic researchers. Again, according to Dr. Gabrielson’s preface,

“Since the material contained herein is still oriented towards “old time” surfers, coaches and young surfers who want to build their own boards, it will never be a general audience type book.” (Gabrielson, 1996 p.n.a)

Lucy Rollin’s *Twentieth-Century Teen Culture by the Decades: A Reference Guide* (1996) is important to this work because it allows the researcher to better understand the cultural roots of surfing in the modern world. It provides a bridge between the ancient Hawaiian combination religion and sport and the modern day sub-culture that surfing has become. It provided a documentary basis for the link between hippy drug culture, and the more wholesome image produced by Beach Boys music and the film *Endless Summer*. It is also part of the inspiration for understanding the growing gender equality developing in sports. It is not a book on surfing; it is a book on the historic evolution of younger generations, through the twentieth century. Marketers of surfing products, particularly to non-surfers, need an understanding of this consumer group. Without it, they are doomed to failure.

Grant Rodwell, “The Sense of Victorious Struggle: The Eugenic Dynamic in Australian Popular Surf-Culture, 1900-50” in the *Journal of Australian Studies* (1999) provides documentation of the early participation of women in surfing and their acceptance by devotees of the sport. While much of his paper is about the perception of the benefits of ‘bathing’ in the surf, “breaker-shooting” is not ignored.

While there are numerous web sites devoted to surfing there is very little formal literature on the subject. Simply put, surfing is not something that is written about, it is something experienced. A book about how to balance on a floating board is, at best, a questionable endeavour. There is a huge volume of literature on lifting bodies, the surface tension of aqueous solutions, hydrodynamics, aerodynamics, hypothermia and a host of similar technical subjects related to surfing. If one is interested in marketing a new type of surfboard, thermal protection suit, or protective gear it might be of interest. There is almost no formal literature on surfing in the normal academic sense.

A web site, *Arts in Perspective* written by Andrea Morton is one of the best sources for background information available. It is centred on Australia, but reflects most of the “surfing community

2.4 Marketing

This category is intended to provide the necessary background to formulate opinions on marketing techniques to effectively enter new markets, or existing markets in which a company has yet to establish itself. The final result will permit a better understanding of the specific market researched to facilitate investigations as to whether a new market has actually emerged.

Surfing represents niche marketing on an international scale. Volumes like Charles Hill's *International Business* (Hill, 2005) provide input on the subject of International Marketing. *Sales Management* by D. M. Phelps (Phelps, 1956), *Marketing Principles and Methods* by Phillips and Duncan (Phillips & Duncan, 1954) and *Principles of Marketing* by Maynard and Beckman (Maynard & Beckman, 1952) provides very good coverage and insights of very basic marketing elements as does *Marketing* by Duddy and Revzan (Duddy & Revzan, 1953). Phillips and Duncan do a particularly good job on marketing policy.

2.5 Psychology

A variety of psychology related texts have been selected in order to give the researcher a better understanding of personality traits. The researcher strongly believes that there is a strong relationship between marketing to surfers, and their psychological profile. Psychological testing would probably provide valuable insight into the makeup of the market in any follow up study.

Consumer behaviour in specialized niche markets is included in this section; there are also several volumes on extreme sports, teen sports psychology and similar subjects. All of these areas are essential to the investigation of surfing.

Belinda Wheaton's *Understanding Lifestyle Sports* (Wheaton, 2004) is the key underpinning of the psychological section of the research of this paper. It is an exploration of what motivates individuals to become not only involved, but immersed, in activities that can be dangerous, even life threatening. It explores the movement toward self-actualisation that can be achieved by challenging oneself without entering into competition with others. Surfing is essentially a solitary activity, even though there may at times be large groups of surfers in prime locations. There may be informal competition between practitioners, but the ultimate question is, "Do I have the courage to challenge this wave, and the skills to exploit it?" Without an understanding of the underlying psychology of the surfer, none of the other elements in this paper make sense or have any relevance.

Playboys in Paradise: Masculinity, Youth and Leisure-Style in Modern America by Bill Osgerby (Osgerby, 2001) is a further examination of the psychology of surfing. Where did it come from, what is its appeal, and how did the "surfer dude" become first an American Icon, and later become translated in other cultures from Australia to Europe? It looks at the cultural and commercial side of the playboy. It provides insights into the motivation of subcultures in terms of the acquisition of the trappings of members of the culture and the establishment of rank or position with the

sub-group. Even though surfers are by nature loners, they do have groups and are not necessarily anti-social. How is group hierarchy established in non-conformist groups? If there is any interest in marketing to surfers, this is of paramount importance in understanding the market.

Peter H. Van Ness in his book, "Spirituality and the secular quest" repeatedly provides insight into the underlying value of the surfer personality. (Van Ness, 1996) It provides clarity into what really motivates the modern generation of surfers. At first glance, surfing seems that it might be a superficial source of personal values, but after reading Mr. Van Ness's book an understanding of some of the deeper spiritual values of the sport became clear. The ancient Hawaiians that made surfing part of a religious experience changed from primitive savages into spiritual beings that understand the key elements of personal existence, and actually achieved Maslow's ultimate personal goal of self-actualization. Without the background provided by Van Ness, much of Ms. Wheaton's material would be difficult to understand. Without a thorough understanding of the cadre of lifestyle surfers, they would be a particularly difficult group to reach in the marketing sense. Without the ability to reach and satisfy this rather elite sub group within the surfing sub group, it would be difficult if not impossible to penetrate the selected market.

2.6 Business

The business section is included to provide a better understanding of corporate strategies, decision making policies and other strategic management issues involving specialized or niche marketing. In the final analysis, marketing is part of the matrix of disciplines that go into developing an overall corporate strategy. Marketing does not take place in a vacuum, but as a key element in an overall strategic approach. The decision to enter the United Kingdom surfing market could be close to a stroke of genius for company A, and a strategy for disaster for company B, in spite of the fact that the situation appears similar in both cases.

Because surfing is an international sport, clothing identified with surfing is sold in at least one store in almost every upscale shopping centre in the world. Reference to international marketing, and international business in general, is a necessity to understand the underlying the surfing market. Here again we mention Charles Hill's International Business. (Hill, 2005)

Corporate Strategy: Resources and the Scope of the Firm by Collins and Montgomery (Collins & Montgomery, 1997) was particularly valuable as it applied the Porter model or 5 forces model to international opportunity. Alex Miller's Strategic Management (Dess and Miller, 1996) focuses on a unified systemic approach to the steps of strategic analysis, strategy formulation, and strategy implementation. Strategic Management by Hunger and Wheelen (Hunger & Wheelen, 1996) had a very good chapter on Environmental Scanning that pointed out the shortage of meaningful and quantitative intelligence sources in the surfing industry. Strategic Management: Concepts and Cases, Thompson and Strickland, (Strickland and Thompson, 1995) is simply a fine in depth text on formulating

managerial strategy. It is perhaps the best text reviewed relating to the matching of company strengths and resources to strategic objectives.

2.7 Research

The selected books are chosen to provide insight in to quantitative and qualitative research, along with phenomenological options. Based on these texts, the researcher attempts to choose the best research method to gain the insight into the subject being examined.

Two statistics texts were reviewed. Freund & Williams, *Elementary Business Statistics: The Modern Approach* (Freund & Williams, 1964) and Berenson and Levine's *Basic Business Statistics Concepts and Applications* (Berenson & Levine, 1979). After a through review of the two texts, particularly on sampling and data collection, provided justification for eliminating quantitative research in favour of the qualitative approach. "...assertions made with equal confidence require larger sample sizes if they are made without knowledge of the form of the underlying distribution than if they are made with such knowledge." (Freund & Williams, 1964 p.178) No one has any knowledge of the underlying distributions of surfers as a universe or as a market. The scope of developing samples large enough to meet even modest levels of certainty, and to validate randomness, and are clearly beyond the scope and resources of this research project. Another valuable source of background material was *Globalization of Corporate R&D* by Reddy (Reddy, 2000). This volume provided insights for the marketing section.

2.8 Summary

The key elements in the literature are the sections on marketing and psychology. The paper deals with marketing to an extremely esoteric niche market. It is key to understand the population of the niche, and how they can be reached. The selection of research methodology was very important in development of original content.

Chapter 3

Methodology

The underlying methodology applied in developing this paper is conventional.

Step 1. A review of all the literature discovered on surfing, the surfing community and the existing world surfing market. This included an examination of several leading international producers of surfing equipment and clothing.

Step 2. An examination on the United Kingdom surfing market reveals a number of producers of specialized equipment such as board shapers and custom wet suit manufacturers in the UK, but these are almost exclusively localized operations. There are also the major international producers.

Step 3. An examination of surfers, their psychology, and existing marketing in the surfing market. The examination of surfing psychology was key, based on the “know your market” requirement. The point is that surfing is a lifestyle sport, and the psyche of the heart of the market, the dedicated surfer, is unique unto itself. Some broad parallels with other lifestyle sports could be identified, but each would have a different demographic profile, and in most cases a different geographic profile as well. No other lifestyle sport has a similar marketing profile of dedicated non-participating followers.

Step 4. An examination of existing surfing marketing. In practice, this actually consists of a careful examination of a number of catalogues, endless web sites selling surfing gear, surfing holidays, and surfing services such as coaching. It also involved an examination of the available annual reports of major suppliers.

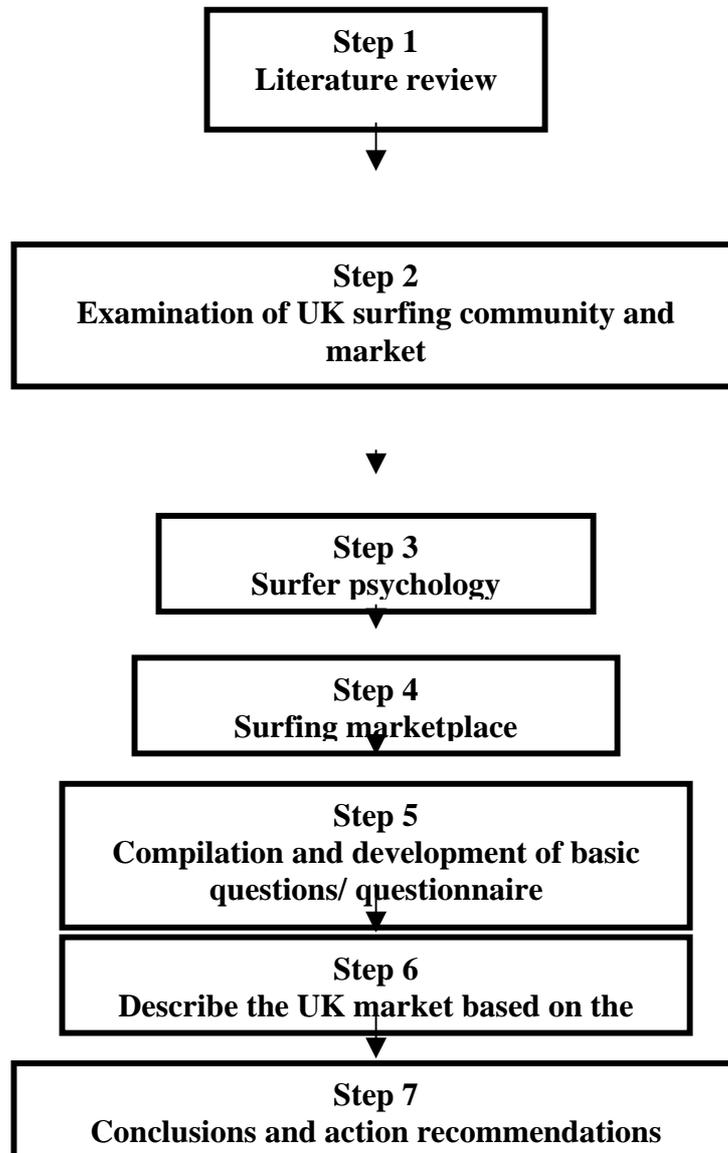
Step 5. The compilation of the information and development of the basic question. Does the United Kingdom constitute a distinct sub market or is it simply an extension of the existing surfing market? With the conclusion that it is a distinct sub market based on the climatic conditions, the study proceeded, and a questionnaire developed.

Step 6. is an attempt to describe the UK market based on the results of a survey of the members of the United Kingdom surfing community. The research centred on the differences between the UK market and the general international market.

Step 7. With this information in hand, what conclusions could be reached and what actions, if any, could be initiated.

This process outlines the activities that produced this study. The flow chart on the subsequent page is a graphic representation of the specific steps that went into developing this dissertation.

Figure 3.1: Flow chart



3.1 The development of the actual study

Phenomenological research is the study of human behaviour, and seeing things from another person's point of view.

Secondary data is used to assess the traditional surf markets as an essential element in the investigation. This will help to provide a full understanding and background of the topic and a good grounding for the project. "Secondary data is data that has already been collected for some other purpose, something which has been published before." (Saunders et al, 1997 p.213)

The researcher also uses a variety of primary research material because of the "new" nature of the investigation. "Primary research is the collection and analysis of new and original material". (Hussey and Hussey,

1997 p.69) This information can be collected through qualitative or quantitative research. “Qualitative research, the phenomena list paradigm, is a mere inductive way of carrying out research. It is spontaneous and flexible, based on direct observation looking for meaning or reason.” (Rudestam and Newton, 2001 p.247) The advantages of Qualitative and quantitative research are summarized in table 3.1 on the next page.

As illustrated in table 3.1, Gordon and Langmaid state that, qualitative research is used optimally for situations which will increase understanding, expand knowledge, clarify the real issues, generate hypothesis, identify a range of behaviours, explain and explore consumer motivations, attributes and behaviour, identify distinct behavioural groups and provide an input to a future stage of research/ development. “It has been said that quantitative research is constrained by the explicit discipline of statistics” (Wright and Crimp, 2000 p.156)

Table 3.1: Research advantages

<u>Advantages of the two types of research</u>	
<u>Qualitative</u>	<u>Quantitative</u>
Open ended, dynamic flexible	Statistical and numerical measurement
Depth of understanding	Sub group sampling or comparisons
Taps consumer creativity	Survey can be repeated in the future and results compared
Database - broader and deeper	Taps individual responses
Penetrates rationalised or superficial responses	Less dependent on research executive skills or orientation
Richer source of ideas for marketing and creative teams	

(Adapted from Gordon and Langmaid, 1988 p.88)

For this reason combined with the comparisons made by Gordon and Langmaid in table 3.1, the researcher is persuaded against quantitative research. The aim of the research is to find understanding of the market rather than merely statistical analysis. The researcher feels qualitative research has all the necessary requirements to achieve the investigations objectives, as it allows the development of a deeper understanding of the field. And as can be seen by Gordon and Langmaid’s last point in the table, the investigation aims to establish “Richer source of ideas for marketing and creative teams” to difference between the traditional market and the new market.

There is another reason that the researcher has reservations about quantitative research. The subject research group is by definition biased. The subject group is defined as active surfers, and preferably individuals involved with the “surfing lifestyle”, a group that would be difficult to define in statistically meaningful terms. Without a control to indicate that the quantitative survey is statistically representative or “random” the value of the results from an academic research standpoint are questionable. A valid quantitative study would require the following steps in this instance:

1. A statistically identifiable universe of individuals who are included in the target group
2. A pilot study of the target group to produce checks for randomness that could be demonstrated to represent the target group
3. An actual study that included “random check questions” to demonstrate that it was representative of the target group

In the surveys actually completed, the results are admittedly and deliberately not random. Every effort was made to query only individuals involved in surfing. A short series of preliminary questions was used to eliminate non-surfers. The results were organized and tabulated to make the results meaningful, but it is not by any measure a quantitative survey. The object is to determine the attitude of surfers to United Kingdom surfing, and to determine if there are any needs or wants in the market that are not satisfied. There is no question the result was biased.

Taking all of this into account, and as Gordon and Langmaid state, qualitative research is centrally concerned with understanding the ‘what’, ‘why’ and ‘how’ of the topic rather than measuring ‘how many’. The conclusion, based on the readings of Schutz 1962, Saunders 1997, Gordon and Langmaid 1988, Webb, Rudestam and Newton 2001, Wright and Grimp 2000 and Hussey and Hussey 1997 is that qualitative research is, by far, the preferred approach for this investigation.

Based on a careful review of quantitative and qualitative research, the researcher concluded using available insider knowledge and access; a qualitative research method is the best path. The final result would combine phenomenological and qualitative research, and would use interview techniques to get opinions and behavioural patterns of the new market. This would also give the opportunity for the interviewer to go into more depth with questions probing an opinion of what they think of the new market compared to that of the traditional market.

The formulation of questionnaires is, at best, only mostly science with a little bit of art thrown in. The object is to provide meaningful and non-contradictory evidence without biasing the results of the survey. The development of a good questionnaire requires a mini-research project in itself. “A questionnaire is an important instrument of research, a tool for data collection” (Oppenheim, 1992:100) A large amount of effort is required to allow the researcher to frame a good questionnaire, then, to write clear, appropriate and unambiguous questions.

Interaction and the Standardized Survey Interview: The Living Questionnaire (Houtkoop-Steenstra, 2000) provided the basis for the construction of the interview questionnaire and invaluable tips on administering a survey.

Chapter 4

Findings and Results

4.1 Psychology

In this section of the paper, the dedicated surfer that comprises the heart of the sport is under discussion. Later in the paper, there is discussion of other consumer segments that are involved in the market for surfing and surfing equipment. While in monetary terms they are an important consideration, without the nucleus of “*surfers*” they would not exist.

“In the early 1930s California beaches were already home to cliques of young men, mostly lifeguards, their friends, and a few women. These cliques socialized, “hung out” and “took things easy”. They also began experimenting with the ancient Hawaiian sport of surfing. The beaches at San Onofre, Malibu and Waimea Bay, with their rolling breakers, became home to small communities of young surfers. These hearty souls manhandled their hefty (as much as 100 lbs), wooden ‘big-gun’ boards into the water to ride the ‘heavies’ and ‘shoot the curl’. The appeal of this nascent surfing scene was limited. Paul Johnson – a veteran of Californian surfing culture – recalled that before the 1960’s the beach was a preserve of a small, pseudo-bohemian fraternity.” (Wheaton, 2004, p.95)

There is nothing complex about surfing. The surfer stands on an aquatic lifting body that they control by shifting their balance and position on the board. The changes cause the edges of the board and the fins at the rear to deflect the water in slightly different ways. The changes in flow, and the partial vacuums created, controls the direction in which the board moves relative to the lifting medium, water. The movement in the lifting medium, plus gravity, provides the propulsive force. The entire process is similar to the actions of wings, ailerons and elevators on an aircraft. The lift is supplied by the partial vacuum created by the movement of the airfoil (hydrofoil) through the lifting medium. The pressure of air, or water, on the side without the vacuum remains constant while the pressure on the evacuated surface decreases. The pressure differential lifts the aircraft or turns the surfboard. (Columbia, 2004)

The appeal of the sport is a combination of many factors. If they are willing to talk about it all, most surfers have difficulty in explaining exactly why they are so dedicated to the sport. Perhaps George Leigh-Mallory, who perished on Mount Everest in 1924, expressed it best. His outlook on mountains was probably much like the dedicated surfers commitment to the sport. When asked, “Why climb a mountain?” he replied, "Because it is there,"

“Other men might give other reasons: adventure, science, to test themselves, to explore unknown ranges as Joseph Rock did in China, to map a mighty mountain as Bradford Washburn did in Alaska. But Mallory's explanation is best: Men climb in answer to a challenge”. (Grosvenor, Severy, and Park 1963 p.332)

The surfer's response might be, “It's the waves man, it's the waves”.

Surfing is a sport much like mountain climbing, in that even in mild conditions it is challenging, and contains an element of risk. It is clear, that in more challenging conditions, such as those encountered during winter in the UK, surfing becomes an “extreme sport”, one in which participants risk serious injury or even death to participate. Participants in extreme sports are neither stupid nor suicidal. They are addicted to the thrill and excitement of the activity. Participation in extreme sports, and the adrenaline rush it precipitates, can be as addictive as any other drug. The difference is that there is nothing illegal about it, and that rather than being physically debilitating, participation usually produces and requires superb physical conditioning. Extreme sport enthusiasts do nothing that injures society in any way, and often make real contributions through their participation although this is not the reason for their participation. (Wheaton, 2004)

Surfing is, and always has been viewed primarily an activity for young people. In fact, it was created by the ancient Hawaiians as early as 1500 and was called in Hawaiian “wave sliding”. It developed into a sort of religious ritual, in ancient Hawaiian “dance as such”. (Soul Surfer, 2006) It is an ancient sport and Hawaiians of all ages participated. It evolved into a youthful subculture when it came away from Hawaii. The participants in many places have been growing younger in recent decades. In warmer climates it has become so much a part of the local scene that now children of 4 or 5 participate. Conversely, in the UK it is very seldom that you see young surfers. This can be attributed to several factors. The conditions are extreme even with the best equipment available. This equipment is expensive, and it means that “hard core” surfers, those with the equipment and skills necessary to handle winter conditions in the UK are almost the only participants. When this is combined with the remoteness of some of the best surfing locations, it implies access to an auto, hence, more expense. Simply put, you need to really be involved in surfing, and have the money to indulge the passion, to be an active surfer in the United Kingdom. This eliminates younger surfers, and those without means. This is far less true in tropical locations where the stereotype of the unemployed “beach bum” surfer grew up.

This brings up a question about the lifestyle element of surfing in the U.K. There is, at least for many participants with in the U.K, a surfing lifestyle. Surfers in the U.K do not hang out at the beach with no visible means of support like the California stereotype. The elements of love of the outdoors, nature, and challenge are still present, but the irresponsibility is absent. Surfers in the U.K are older, more settled, and more affluent. There is probably still the strain of non-conformity and rebellion, but it is less obvious.

In the early years of the sport, the prevailing youth culture around the beaches was coloured quite a bit by the local ‘beat’ scene. The beatniks emerged in the late fifties as the new avant-garde. Their casual nonconformist attitude and their artsy-philosophical style had a certain romantic appeal. These quasi-bohemian non-conformists often developed enclaves at the oldest hence most established beach areas. Thus, they exerted a powerful influence on the surfers who were to arise and inherit the domain.

However, a broader based, less esoteric beach-focused youth culture was developing by the late 1950’s. Surfing quickly grew in popularity, and developed into a major commercial industry with the advent of the lightweight polyurethane board.

Hollywood represented beach culture as a place of freedom, and an escape from the humdrum reality of everyday life. All the responsibilities of work, school, and marriage are temporarily suspended in favour of the playful hedonism of parties, surfing, teenage sexuality and romantic flings. (Rollin, 1999)

Surfing represents real values. The values may not be universal, but they are not celluloid shadows. They have little to do with current surfing culture. This historic Hollywood culture is notable for the way it eschews conformity to the world of work and onerous commitments in favour of a less constrained universe of ‘personal enjoyment, fun, and parties on the beach. Basing serious businesses or marketing plans on the shadow values is a certain receipt for disaster.

Unfortunately, the representation of this period grossly overstates the case, when it presents the sixties surf scene as ‘explicitly antibourgeois. This 60’s surfing community, as does its present day counterpart, have to some extent hedonistic values. The orientation of surf culture was and is adaptive rather than rebellious. Rather than confronting or resisting the dominant cultural order, the surfers simply “dropped out” of conventional society and built their own with their own particular values and morals. (Wheaton, 2004)

How is it possible to make sense of this popularity of so-called “lifestyle sports”, as the central characteristics of these activities represents a total departure from the traditional “mainstream” sports. Possibly, it is because these alternative sports are ideologically different from, and provide alternatives to the mainstream sports and the conventional values of teamwork, discipline, and conformity they represent. Surfing or rock climbing are the exact opposites of team sports. The carefully choreographed plays of American collegiate or professional football are at the opposite end of the spectrum from the solitary surfer controlling his board. The popularity of a whole range of alternate sports, most of which include the same element of individuality that absolutely includes surfing, is “mainstreaming” them. They garner increased media and market attention, and now received a great deal of attention from both academic and non-academic commentators. (Osgerby 2001)

“Surfing has appeal far beyond the surfers who provide the marketing cool. There's a surf shop in Singapore but the roughest water is the condensation on its windows. A boutique surf store competes with Chanel and Prada for the consumer waves of downtown New York.” (Osgerby, 2001 p.329)

The surfing lifestyle emerged as part of the counter culture as an irreverent culture that was the opposite of mainstream sports activities in the 1960s. With its growing popularity professionalism soon appeared, and with professional surfers, competition rules and codification soon appeared. The surfing culture quickly lost its anti-competition identity.

'Anti-competition' and 'anti-popularity' debates and attitudes prevail, despite widespread surfing professionalism. Big wave surfing is the basis of surfer competition for prestige. Tow-in-surfing, a system using a modified jet ski to tow the surfer out to larger waves as an aid in surfing bigger waves produced a controversy within in the surfing community. It is felt to be “phony” by many surfers.

This is a marketing dissertation. It is not intended as an in depth psychological study on the subject of surfing. Conversely, some understanding of the “surfer psychology” is a necessity if the potential marketer to the surfing community is to succeed. Indeed, they must understand that there is a “surfer community”, who the member of the community are, and what their basic psychological profile is like, if he or she is to market successfully to them. All the caveats about generalizing concerning any group apply to the following.

The surfer community for purposes of this paper is divided into four groups:

1. The neophyte-defined as surfing for less than one year and concerned primarily with gaining the basic skills necessary to ride a board on a wave.
 2. The casual surfer-defined as a person with at least the basic skills necessary to surf successfully in “normal” conditions, who enjoys the sport, but simply views it as a recreational activity. Some casual surfers attain considerable surfing expertise.
 3. The “surfer” is dedicated to the sport, and the way of life it encompasses. Surfing is more than a recreational activity; it defines the personality and the lifestyle of the “surfer”. They have probably attained a level of proficiency that allows surfing in extreme conditions. Indeed, the more extreme the conditions (within reason for most people) the better.
 4. There is also a social surfer. One who enjoys the activity, and is in many ways a “casual surfer”, but is also involved in the sport because he or she enjoys meeting or being around “surfer” types. Occasionally, they attain considerable proficiency, but will never become “real surfers” because their
-

personality is gregarious not solitary. They are group members, not individualists.

Surfing became the sport of the so called “hippie generation” that replaced the “lost generation” of the 1930 that is portrayed in the work of F. Scott Fitzgerald. They tend to be introspective and isolated. They are not team players but soloist, concerned with competing only with themselves. They are more like the runner that is concerned more with beating his own best time than setting the world record. There are surfing competitions, but the participants, while they enjoy winning are less concerned with winning than with the quality of the “ride” they achieved based on their own internal standards. In his book, “Spirituality and the Secular Quest” Peter Van Ness includes the following quotations:

“In surfing the challenge is wholly individual. There is neither team nor individual competition. Surfing is just you and the ocean, you against the waves or with the waves. You call the signals. You lay the strategy. You execute the maneuvers. You make on-the-spot improvisations and adjustments to suit the situation of the moment. Add to these things the fact that no two waves are the same, and it is a solitary person, an individual, meeting unique challenge after unique challenge. There are no phonies in body surfing. There is no glory in carrying a pair of fins. It's a basic, primitive thing. It's just you and the ocean.” (Van Ness, 1996 p.412)

This in no way implies that the individuals are incapable of relating to others or to working in harmony with others. Like many extreme sports, some forms of surfing such as “Towing²” or “Trucking” require teamwork, and allow the participants to enjoy activities that would be difficult or virtually impossible without the assistance of others. There are some subtle differences in motivations however. All the members of a mountain climbing team for example get the same reward at the same time. In surfing, one member of the team benefits from the efforts of the other members with the understanding that at another time he will provide the same service for the person providing it to him. Actually, it is very likely that the person operating the Jet Ski also gets a certain amount of excitement, and sense of personal accomplishment, by towing a surfer into waves that may be from 25 to 50 feet from crest to trough, and then returning to shore through the same surf conditions that make for good surfing. The tower may get quite a few exciting moments, and perhaps even his or her own adrenalin high.

The dedicated surfer is not usually interested in making a fashion statement. To the contrary, he or she is interested in utility. Their utilitarian clothes become fashion statements for the “social surfer” mentioned above, and the non-surfers that are just followers. This does not mean that surfers

² Act in which a surfer is pulled onto a wave which is too big to paddle onto by a specially designed pulley system attached to a Jet Ski.

have no interest in the quality of the equipment that they use. They are betting their safety and lives on the quality of the equipment they are using. The surfers that “tow” include in their equipment hospital grade oxygen and extensive trauma treatment supplies, including splints and similar items. (Wheaton, 2002) They are not oblivious to the danger. Their approach must be like that of any other person that goes in harms way. The essence of courage is the internal strength and discipline to control it, manage it, and even make it work for you to survive the situation. Lack of fear in a dangerous or life threatening situation is based on stupidity, insensitivity, or familiarity with the situation and experience in surviving it. In the last case, the lack of fear is based on self-confidence, and the knowledge that the necessary skills and ability are present to survive the dangerous situation.

The concept of male dominance remains central in creating, maintaining and reproducing men in many Western cultures. A masculinity that is marked by combative competition, aggression, courage and toughness, is the essential underpinning of many, perhaps most, high-level competitive and professional sport cultures. They promote and celebrate values that can be sexist, endorse violence, and often promote homophobic and racist tendencies. However, sport is not a 'monolithic structure. Gender is re-created, performed and resisted differently in the many activities considered sport. A mixed doubles competition in tennis is the opposite extreme.

The masculinities of the runner, football player, and rock-climber are qualitatively different; each sport combined various symbolic discourses to create masculinity particular to the sport. There are a number of accomplished women rock climbers who would question the exclusive masculinity of the sport. It is essential for the surfing marketer to appreciate that surfing, while dominated numerically by men is absolutely a transgender sport.

It is misleading to view 'sporting masculinity' either as presented in the media representations, as it is lived as a player, or even as spectators as fixed. Like other forms of masculinity, it varies over time, by culture, and between men of different age, backgrounds, social class, ethnicity and sexual orientation. At various times men wore swords in Europe and pistols in the American West as evidence of masculinity. Masculine symbols and standards are the subject of continual process of change and revision.

A central question for lifestyle sport researchers is whether newer non-traditional sports, such as surfing, offer new and potentially more permanent changes in both male and female physicality, than the preponderantly masculine or feminine characteristic of traditional sports. This suggests further question. Are the changes produced by these new lifestyle sports permanent changes in existing gender, race, class, and body dominance? How are the new lifestyle sports gendered? How are these gender performances regulated and monitored, and how is the marking of 'difference' or otherness related to exclusion?

In any attempt to penetrate the surfing market, the answers to these psychological questions assume considerable importance. For example, can Quiksilver retain its existing customer base as they become older, and either

give up surfing or find other activities that become more important in their lives than they are currently? If the changes in self-image are permanent, can Quiksilver capitalize on this new understanding of its potential client base? (Wheaton, 2002)

It is difficult to document, but in “their sports”, for example figure skating and tennis, female athletes gain respect as great as their male counterparts. It also appears that this is true in many lifestyle sports as well. Surfing, while it is physically strenuous, is more closely connected to balance and technique than brute strength. Paddling out through surf requires considerable physical strength. Once through the surf line maintaining position is normally not hugely difficult. Actually riding a surfboard, even in extreme conditions requires fitness and finesse far more than pure strength. The surfing culture has developed a sort of “ambivalent masculinity” that is less excluding of women and 'other men' than many institutionalized sport cultures, or the middle-class work cultures in which they are embedded. “Laddishness” or “manhood”, particularly as it relates to status based on competition in physical activities, is diminished in importance in transgender activities. Masculinity based on the subordination and of women who are regarded as “things” which can be “owned” or as passive sexual objects, is primarily a viewpoint of younger men with an elitist attitude on which their values are based. More typically, surfers of both genders emphasize the supportiveness and camaraderie of participants in the culture that includes men and women equally. There is a tendency among the younger men to be competitive over their sub cultural status. They find it necessary to demonstrate their masculine identities within the surfing community. There is a considerable variance in this respect between the younger men and the older men in the group. The more senior and mature members draw on a range of masculine identities such as work and fatherhood.

Surfing, climbing, and other lifestyle and/or extreme sports permit the establishment of masculinity, and more important particularly for the women involved, accomplishment without direct competition. They are non-aggressive activities that do not involve body contact, yet they embrace and even create fetishes of the notions of risk and danger. (The preceding paragraphs are a compilation of Wheaton 2002, Osgerby 2001, Rollin 1999 and the researchers personal experience and observations.)

4.2 Marketing

There are no definitive statistics on the UK Surfing market currently available in public documents. It therefore was necessary to create an estimate of the size of the market based on census demographic data, assumed penetration and assumed per capita spending. If it were assumed that 5% of the males in the 10-39 year age range and 1% of the females are at least occasional surfers, it would indicate that there are about 720,000 surfers in the UK. The supporting demographic data is presented in the table 4.1 below. It is further assumed that on a per capita basis, each surfer spends £125 on equipment and clothing, and £500 on surf related travel and similar expenses, the total surfing market in the UK amounts to £450 million (US\$786 million). The market for Equipment and clothing is

estimated at £90 million (US\$157 million), and travel and other related expenditures at £360 million (US\$628 million). Clearly, 720,000 overstates the number of active “surfers” in the UK, and this is offset by relatively low per capita spending estimates. There is also no allowance for surfers from other European countries that come to the UK to participate in the sport. The total estimate presented here is intended to be and is considered conservative. The demographic data on which these estimates are based are presented in table 4.1 below.

Table 4.1: UK Demographics Census 2001

UK Demographics Census 2001				
Age Range	Male	Female	Total	Estimated Market
10-14	1,987,606	1,892,951	3,880,557	118,310
15-19	1,870,508	1,793,274	3,663,782	111,458
20-24	1,765,257	1,780,727	3,545,984	106,070
25-29	1,895,469	1,971,546	3,867,015	114,489
30-34	2,199,767	2,293,765	4,493,532	132,926
35-39	<u>2,277,678</u>	<u>2,348,099</u>	<u>4,625,777</u>	<u>137,365</u>
Totals	11,996,285	12,080,362	24,076,647	720,618

Practitioners are self-consciously aware of 'being seen', and the presentation of the proper image to others. They are in some respects at least; a return to amateurism in sports. These sports involve the consumption of new objects be they boards, bikes, discs, rope and pitons or other elements that often involve new or improved technologies while embracing change and innovation. Surfboards have evolved from simple wooden planks that could weigh up to 50 kilos, into foam or cell composite lifting bodies weighing 20% or less of the weight of the original wooden boards. The composite boards incorporate complex hydrostatic engineering of sophisticated shapes to improve stability and controllability.³ Technological improvements have resulted in rapid developments in many lifestyle sports including surfing. This technological richness has resulted in the fragmentation and diversification of the culture, and its forms of identity. The same fragmentation can produce new scenes, or even the creation of new activities such as wind surfing or towed surfing and the revival of long boards. Each genus has its own exponents, and there is even some rivalry between them. However, there can be no denial that they are all related, even the snowboard, and share a common ancestor in the ancient Hawaiian surfboard. There is also commonality from a marketing standpoint. UK surfers and snowboarders face similar temperature and

³ For example: Most non-surfers are familiar with the expression “hang ten”. Few know that it refers to moving to the extreme front of the board and “hanging” the surfer’s toes over the front edge. Even many surfers do not know that to do it successfully requires a specially configured board with a hollow area on the bottom front to allow the board to remain stable when unbalanced to the front.

weather conditions. Why should they not share products?

The impact of consumer capitalism is evident in the rapidly growing array of commodities linked to surfing. At the same time, vendors of equipment, clothing, videos and magazines have expanded from specialty boutiques to the mass merchants from Wal-Mart down. Belinda Wheaton in "Understanding Lifestyle Sports" reports,

"In 1999, surf clothing giant Quiksilver's sales of surf-related products had rocketed to over US\$450 million; by 2002 the global surf industry was reported to be worth around AU\$7.4 billion (over 2 billion dollars)". (Wheaton 2004 p.119)⁴

By 2004, Quiksilver reported total revenues of US\$1.27 billion. (Quiksilver Annual Report) The multinational producers of surfing products like Quiksilver and Oakley have distribution in every major world market. This produces standardized products and promotional materials worldwide. Distributors or importers of the multinationals like Quiksilver and Oakley distribute the products of these multinationals in many countries.

The Surfing market's ability to diversify and grow is reflected in the speed in which 'surf style' for women expanded during the 1990s, the initial catalyst was the success of women's board shorts. Based on this single item, a variety of feminine related products appeared rapidly. Research in various 'local' markets highlights the complex and contradictory influence of the lifestyle sports market. Commercialization is not a standardizing force. Lifestyle sports cultures adapt, and change rapidly as do most youth oriented markets. Over the past decade or two sociological research has provided a more sophisticated understanding of the complex dynamics between subculture, the mass media, and global commercial culture.

Ms Morton on her web site makes the surfing marketing dilemma very clear, she states surfers can be recognized easily by their fashion sense. Over past decades the surfing culture has developed their own uniform or dress code. This comprises of typical surf wear, such as boardshorts, Batik shirts, Hawaiian shirts, surf T-shirts, jeans and specific styles of shoes. Boardshorts were specifically manufactured for use whilst surfing but over recent decades have evolved into everyday wear and an item which you would expect to see in most surfers wardrobes. The surf T-shirt was originally designed and produced as advertisements for surfboard manufacturers and as a way for surfers to show their affiliation to a particular manufacturer. Modern surf T-shirts are not only used as surfboard advertisements, they are frequently art works in themselves,

⁴ The author finds this reference questionable. In 2002 the approximate exchange ratios were between Aus\$1.77 and Aus\$1.96 approximately. This would indicate that the US\$ value was US\$4.2 billion and US\$3.8 billion. Ms. Wheaton's substantiating reference is (Gliddon 2002 in Arthur 2003:154), neither of which the author is able to locate. The apparent inaccuracy of the data does not alter the fact that the surfing market represents a substantial marketing opportunity.

depicting the ideal wave, the latest surf contest, or board riders club. . It is also common to wear Hawaiian shirts ad Batik shirts to show association with the two places on earth where the bulk of surfers crave to surf.

This dress code or uniform has lead to the development of a multi-million dollar surf clothing industry with companies such as Billabong, Rip Curl and Quiksilver leading the way. Surf clothing is always changing and evolving. These surf-clothing companies have opened the surf culture and made it available to all areas of society even if they are not actually a surfer. By wearing this uniform, an individual in Tokyo can feel as if, they are an element of the surfing culture. It is now virtually possible to walk into any mall in a major city in the world and find shops advertising and selling surf boards and brands.

Even though the manufacturers of surf clothing need to sell their products to the general public as well as surfers to be profitable, these companies try and remain detached from society, as often displayed in their advertising, and motto's such as Billabong stating on all their products that "only a surfer knows the feeling. (Morton, 2006)

4.3 Questionnaire results

The underlying purposes of this questionnaire are to determine:

1. The attitude of participants in the United Kingdom surfing market toward surfing in the UK
2. What products, if any, are needed and wanted in the UK market,
3. To determine the best psychological marketing approach(s) to use when marketing new products in this market.

The survey designed comprised five basic questions concerning the respondent's reactions to the surfing equipment and surfing in the United Kingdom. The questions are carefully constructed to require some introspection on the part of the respondents. This is pure qualitative research. What the researcher is attempting to determine are feeling and emotions, not statistics to build models.

The survey was administered to 80 people in five different surfing locations, 20 each in three locations, fifteen in a fourth location, and 5 in a final location⁵. The interviewer made every effort to select respondents at random, but only active surfers. Before beginning the interview, several informal questions were asked to determine if the respondent was qualified as a participant in the survey. In practice, when an interview was completed, the next five people to pass were ignored and the sixth approached. If number six failed to agree to be interviewed, the next person to pass was approached, and so on until another interview was accomplished. When twenty interviews were complete, the interviewer

⁵ Based on the interviewers personal knowledge of the areas involved and the likelihood of finding fairly advanced surfers the following locations were selected, Fraserburgh, Thurso, Portrush, Pease bay and Coldingham. This process was facilitated because the researcher is a dedicated and reasonably advanced surfer. This provided access to and knowledge of wave models. This allows the prediction of wave patterns (size and frequency) and was used as a guide to locate beaches and times where and when a concentration of serious surfing enthusiasts could be found.

went to the next beach on the list. The first un-tabulated questions asked were to determine if the subject was actually a surfer, had tried it at least once and intended to try it again. The next question asked was, "Do you consider yourself a surfer. Is it your primary or one of your primary recreational activities?" No count was kept of respondents that did not meet our criteria as "surfers", and three said they had tried it, and did not expect to try it again. These were also eliminated. More than half indicated that surfing was their primary activity, and anything else they did was based on their desire to surf. Surfing was their life: or "*Surfing is not a matter of life and death, it's really important.*"

The time of year the survey was performed may have distorted the results somewhat. To surf in January or February in the UK, in itself, indicates a significant commitment to the sport. If the survey is repeated or expanded, some question or questions concerning the principal economic activity of the respondent will probably be added.

Age category, sex, surfing experience, number of days spent surfing per month, and home country were included in the information section of the questionnaire. The questions were administered verbally and verbal responses were recoded as close to word for word as possible. Where this was not practical, the response was read back to the responder and corrected if necessary.

All these values correspond with our "empirical guesstimates" of what the values might be. We suspect, if an accurate census were taken of surfers, the average age would probably be slightly higher than our sample indicated, and that a slightly higher percentage might be women. It is generally believed within the surfing community that growth in the number of surfers is over 10%, and might approach 20%. The 16.5% that were classified as beginners supports this estimate.

4.4 Tabulation of results

Table 4.2: Tabulation of results

Experience	Percentage		Frequency	Percentage
Advanced	55%		< 30 days per year	70%
Average	28.5%		> 31 days per year	30%
Beginner	16.5%			
Age			Gender	
Under 25	52%		Male	80%
Between 25 and 40	48%		Female	20%

Origin		
U.K	80%	
Other	20%	

1. How do you feel about the surfing equipment you are currently using?

2. What would have to happen to make your current equipment better?

Better feet, face and hand protection	80%
Don't know	20%

3. What do you like best about surfing in the U.K?

The waves and my surfing friends	100%
----------------------------------	------

4. What do you like least about surfing in the U.K?

Too cold	80%
A bit too expensive	20%

5. Why do you surf in the U.K?

It is easy and accessible for me and my friends to get too	100%
Tropical surfing too expensive and time consuming	15%
No one to go elsewhere with	5%

Board	80% Good	20% Not good enough
Suit	80% Good	20% Not warm enough
Other	47% Don't know	53% Head and face not protected

Chapter 5

Discussion of the market

The market appears to be dominated by the devoted “*surfer*” for whom surfing represented a lifestyle as much as an activity. While no documentation is available to back up the researchers conclusions or definitions of the surfing market, it would appear that the characteristics of the UK market is unique at least in some respects. There are far fewer “casual” surfers than there are in California for example. The market among “non-surfers” for surf related gear and clothing is probably less important. The surfing expenditures per capita among participants are probably considerable higher than those of surfers in other markets.

Part of the problem is the impracticality of the “surfer uniform” in the UK. The peak surfing season is mid-winter when board shorts are utterly out of the question. Surfers in the UK wear wet-suits virtually all year round, and these are not likely to become part of the casual wardrobe of even the most dedicated surfer. There may be people, surfer and non-surfers alike that wear board shorts and tee shirts in summer, but it will be as a “fashion statement” and not in emulation of the wet suit clad English surfer.

The idea of facial protection arose in several questionnaires, and this could well be a product for the UK market that would fill a current void in the market place. There might also be openings for other products from portable heated dressing rooms to outerwear designed for surfers. It is possible that items like outerwear might be practical as wedges to penetrate the market for non-surfing purchasers.

It appears that the market is well served in terms of the available product. In discussions of equipment no one mentioned any problems in purchasing any piece of equipment he or she wish to buy. So far as it can be determined from the research conducted for this paper no major manufacturer is under represented in the market place and there is a very adequate number of local “craft” type shops producing such items as wet suits and shaping boards to order.

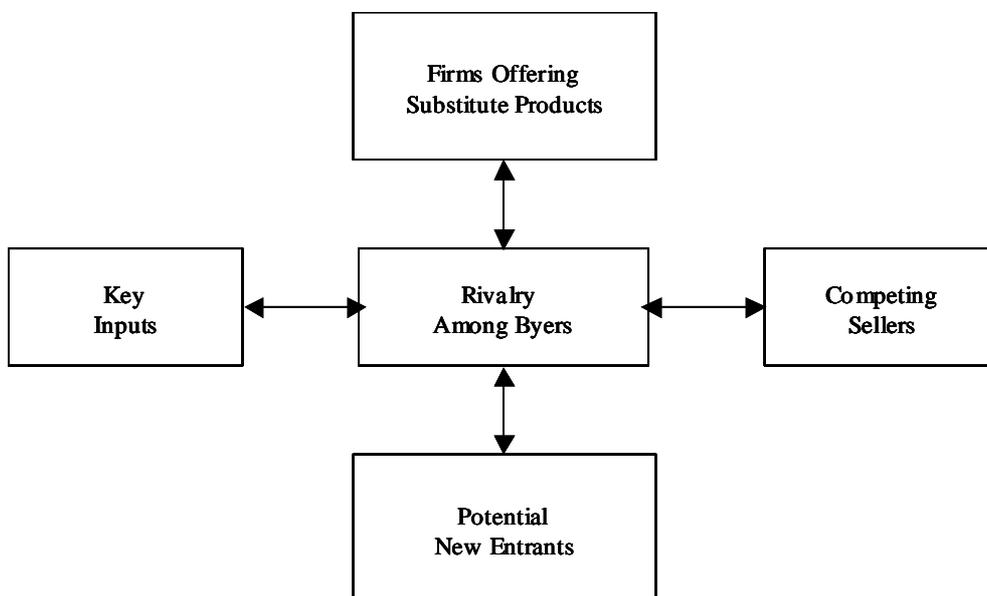
Innovation would be required for any current or prospective participant to significantly alter the structure of the market except over time, based on a detailed strategy. The decision to make the investment required to penetrate or increase penetration in the UK market would be based on financial considerations and resources. Strategy is discussed in the next section.

Chapter 6

Strategy

What follows is an extremely modified application of the Porter 5 forces model to the penetration of the UK surfing market. The obvious shortcoming in the analysis is that there is no primary company that is undertaking the analysis. This makes the company situation analysis very difficult. For example, the discussion of rivals very general – who are they and rivals of whom?

The model looks as follows:



Strategic considerations include such factors as:

- Market size **relatively small**.
 - Market growth rate relatively **high**.
 - Capacity surpluses or shortages **none that seem relevant**.
 - Industry profitability good **based on published reports of publicly owned participants**.
 - Entry or exit barriers moderately **high entrance barriers, low exit barrier**.
 - Product is a big-ticket item for buyers only **moderately large**.
 - Rapid technological change **moderately rapid, not extremely**.
-

-
- Capital requirements **based on scale of competitors moderately high**
 - Vertical Integration **not necessary but possible and strategically interesting**
 - Economies of scale **for most items all producers relatively small (outsourcing possible)**
 - Rapid product innovation **ongoing small innovations evolution not revolution**

There is little bargaining power on the part of ultimate consumers. They are typical retail buyers. There is at least some interest in the part of major retail chains in competing with the local surfing store, but there is a problem for them of personnel lacking requisite skills and knowledge. They could have great bargaining power relative to the producer.

The potential for new entrants is high. Most of the majors are already represented widely in the UK market, but this would not preclude new entrants either by producers that have concentrated on other markets or new UK based producers. Capital requirements to establish a new retail store or production facility are not prohibitive.

Suppliers are not a serious problem. There have been some questions in the California market concerning environmental concerns with board producers but this is an operating problem, not a serious hindrance. A few of the large multinational producers may have some bargaining power with material suppliers, but this is limited. With increasing production of wet suits, board and clothing in the Far East and India (outsourcing), this entire area becomes a critical long and short-term strategic consideration. It will depend in large part on the philosophy and sub segment of the market the producer is involved with.

A firm in other industries offering a substitute is always possible. For example a fabricator of products using rubber sheeting could come up with a "dry" suit that would compete with a wet one. There are other sports like wind surfing and kite surfing that are competitors to traditional surfboard shapers. Anyone handy with tools can make a surfboard. This is not a serious strategic problem.

Surfing is no different than any other industry in that all the commercial participants are always jockeying for better position and competing every day. This is no more or less true in the UK surf market than any other. Because it is a new and undeveloped market there is an opportunity for innovation open to anyone with initiative and creativity to come up with new ways to exploit the market. These are as likely, perhaps more likely, to come from the hospitality industry and real estate development as from the manufacturing side.

Chapter 7

Conclusions and recommendations

7.1 Conclusions

The United Kingdom surfing market is a separate and distinct market within the worldwide surfing marketplace. It represents a number of atypical characteristics such as the age and income levels of the participants. Because of the climatic conditions in the United Kingdom the quantity and quality of equipment needed to participate fully is higher than in the typical tropical surfing locations around the world. There are also transport requirements to reach desirable surfing locations. Unlike California, Australia, and Hawaii where good surfing beaches abound very close to major residential centres, good surfing beaches usually are hundreds of kilometres from significant population centres in the United Kingdom. This produces additional costs to participate.

Because of geography and climate, the United Kingdom does not lend itself to the bohemian lifestyle generally associated with surfing. The typical United Kingdom surfer is older, more affluent, and has a somewhat different set of economic values than those generally associated with surfing. Because of the expense, effort, and dedication required to participate in the sport, the characteristics of the market are somewhat different.

In terms of products offered to the market, there is a significant difference in mix of product sales in the market. There is little difference in surfboards between markets. Waves are waves if the water is warm or cold. Protective equipment is very different. Without protective equipment a surfer would have a life expectancy measured in minutes on a Scottish beach in winter. Hypothermia is a risk in cold-water surfing, and protective gear is an absolute must. There is no such thing as getting by with substandard equipment. Equipment that fails to keep the user warm is worse than uncomfortable; it is dangerous to the point of life threatening.

There is plenty of good equipment available from existing international suppliers and local custom fabricators. Conventional equipment offers little market opening opportunity. The one piece of equipment that is not available is some sort of facial and eye protection, and it was mentioned on several questionnaires. Most surfers in the UK offered little complaint about the quality of wet suits offered in the marketplace. The single most common complaints are a cold face or eyes that water and impaired visibility. The interviewer suggested no such product, but direct and indirect references occurred on 9 of the 80 completed questionnaires. If a question such as would you like a product that would protect your face and eyes from the cold were asked, it seems likely to the interviewer that a much higher percentage than 10% would indicate an affirmative. It is not a case that winter surfing needs this product to exist. It would improve the comfort level and therefore the pleasure of participating.

The researcher sees two engineering problems in developing such a product.

1. Material that is insulating and waterproof is usually also airtight. Some system must be developed that allows the surfer to breathe without being subjected to cold water.
2. The second problem is sealing non-shattering eye protection against water in case of a wipe out.

These are both engineering problems that can be solved. A product for facial protection, even if not perfect does offer an opportunity to gain a foothold in the United Kingdom surfing market. A surfing facemask would offer a unique product and permit the producer to enter the marketplace with a novel offering.

7.2 Recommendations for future research

Phenomenology “1. The study of the development of human consciousness and self-awareness as a preface to philosophy or part of philosophy. 2. The description of the formal structure of the objects of awareness and of awareness itself in abstraction from any claims concerning existence ”
(Webster’s New Collegiate Dictionary, 1999 p. 860)

As symbolic inter-actionists argue that interaction takes place in such a way that the individual is continually interpreting, the symbolic meaning of his or her environment (which includes the actions of others) and acts on the basis of this imputed meaning. For these reasons, combined with the findings of Schutz (1962), the researcher thinks it would be very interesting in the future to use phenomenological research at some of the remote surf spots in the North coast of Scotland. With the researcher’s insider knowledge and access to different cultures visiting these spots, it would be a good way (if time and budget permitted) to expand on the research already undertaken and find more differences between the way the traditional market acts and the characteristics of the “new” United Kingdom market. By studying the differences in the human behaviour of different groups and cultures in the new markets, the researcher believes it would make the research answer clearer. To the extent that motivation can be deduced, better and more effective strategies can be formulated that take advantage of the incremental insights gained.

8.0 References

- Augustin, J. 1998. Emergence of Surfing Resorts on the Aquitaine Littoral. *The Geographical Review*, 88 (4)
- Bale, J and Vertinsky, P. 2004. *Sites of Sport: Space, Place, Experience*. London Routledge
- Beckman, T.N and Maynard, H.H 1952. *Principals of Marketing* 5th ed. New York: Ronald Press Company.
- Berenson, M. L., & Levine, D. M. 1979. *Basic Business Statistics*. Englewood, New Jersey: Prentice Hall, Inc.
- Borden, Iain. 2001. *Skateboarding, Space and the City: Architecture and the Body*. New York: Berg
- British Surf Association. 2005. *Surf history* [Online] Available from: <<http://www.britsurf.co.uk/news/HISTORY.htm>> [Accessed 28 September 2005]
- Bryman, A. 2004. *Social research methods*. 2nd ed. Oxford: Oxford University Press
- Carney, G O. 1999. Cowabunga! Surfer Rock and the Five Themes of Geography. *Popular Music and Society*, 23 (4)
- Collins, D. J., & Montgomery, C. A. 1997. *Corporate Strategy: Resources and the Scope of the Firm*. Chicago: Irwin.
- Columbia. 2004. *Encyclopedia* [Online] Available from: <<http://www.questia.com/PM.qst?a=o&d=101232494>>. [Accessed 7th February 2006]
- Duddy, E. A., & Revzan, D. A. 1953. *Marketing: An Institutional Approach* 2nd ed. New York: McGraw Hill.
- Duncan, D.J and Phillips, C.F. 1954. *Marketing: Principals and Methods*. Rev. ed. Homewood Illinois: Richard D. Irwin.
- Freund, J. E., & Williams, F. J. 1964. *Elementary Business Statistics: the Modern Approach*. Englewood Cliffs, New Jersey: Prentice Hall, Inc.
- Gabrielson, B. C. 1996. *The Complete Surfing Guide for Coaches*. [Online] Available from: <<http://surfcoach.protecttheocean.com/coachbook.html>> [Accessed 4th March 2006]
- Gabrielson, B. C. n.d. "Snake" Gabrielson's Surfing Page [Online] Available from: <<http://hbsnakesurf.com/>> [Accessed on 4th March 2006]
- Gordon, W and Langmaid R. 1988 *Qualitative market research a practioners and buyers guide*. Hants: Gower Publishing Company Limited
- Government. 2001. *National statistics* [Online] Available from: <<http://www.statistics.gov.uk/census2001/profiles/uk.asp>> [Accessed on 3rd February 2006]
-

-
- Government. 2005. *Nike, Inc.* [Online] Available from: <<http://www.EDGAR.gov>> [Accessed January 12th 2006]
- Grosvenor, M. B, Park, E, Severy, M. 1963. *Great Adventures with National Geographic: Exploring Land, Sea, and Sky.* Washington, DC: National Geographic Society
- Hart, C. 1998 *Doing a literature review.* London: Sage publications
- Henderson, M. 1999. Some Tales of Two Mags: Sports Magazines as Glossy Reservoirs of Male Fantasy. *Journal of Australian Studies*, 64
- Hill, C. W 2005. *International Business: Competing in the Global Marketplace* 5th ed. Boston: McGraw-Hill Irwin.
- Houtkoop-Steenstra, H. 2000. *Interaction and the Standardized Survey Interview the Living Questionnaire.* Cambridge: Cambridge University Press.
- Hunger, J. D & Wheelen, T. L. 1996. *Strategic Management* 5th ed. Reading Massachusetts: Addison-Wesley.
- Hussey, J and Hussey, R. 1997 *Business research palgrave*
- Lanagan, D. 2002. Surfing in the Third Millennium: Commodifying the Visual Argot. *The Australian Journal of Anthropology*, 13 (3)
- Miller, A.1998. *Strategic Managemen* 2nd ed. New York: McGraw-Hill.
- Morton, A. (n.d.). *Arts in Perspective Surfing Australia* [Online] Available from: <<http://www.blackmagic.com/ses/surf/papers/surfart.html>> [Accessed on 19th February 2006]
- Oppenheim, A.N. 1992 *Questionnaire design, interviewing and attitude measurement.* New ed. London: Pinter Publishers limited
- Orams, M. 1999. *Marine Tourism: Development, Impacts and Management.* London: Routledge
- Oserby, B. 2001. *Playboys in Paradise : Masculinity, Youth and Leisure-Style in Modern America.* New York: Berg
- Phelps, D. M. 1953. *Sales Management Policies and Procedures.* Homewood Illinois: Richard D. Irwin
- Reddy, P. 2000. *Globalization of Corporate R&D.* London: Routledge.
- Rodwell, G. 1999. The Sense of Victorious Struggle': The Eugenic Dynamic in Australian Popular Surf-Culture, 1900-50. *Journal of Australian Studies*, 56
- Rollin, L. 1999. *Twentieth-Century Teen Culture by the Decades A Reference Guide.* Westport, CT: Greenwood Press
- Rudestam, K.E and Newton, R.R. 2001 *Surviving your dissertation.* 2nd ed. London: Sage Publications
-

Soul Surfer. n.d. *Hawaiian Surfing History* [Online] Available from:
<<http://www.soul-surfer.com/surfing-hawaiihistory.html>> [Accessed on 20th
February 2006]

Strickland, A.J and Thompson, A.A. 1995. *Strategic Management: Concepts and Cases* 8th ed. Chicago: Irwin.

Schutz, A. 1962 *Collected papers 1: The position of social reality*. The Hague: Martinus Nijhof

Van Ness, P.H. 1996. *Spirituality and the Secular Quest*. New York: Crossroad Publishing,

Webb, J.R. 1999. *Understanding and designing marketing research*. London: International Thomson Publishing company

Websters. 1999. *Collegiate dictionary* [Online] Available from:
<www.dictionary.com> [Accessed on 7th December 2005]

Wheaton, B. 2004. *Understanding Lifestyle Sport: Consumption, Identity, and Difference*. London: Routledge

Wright, L.T and Grimp M. 2000 *The marketing research process*. 5th ed. London: Prentice Hall

Visit Scotland. 2005. *Surfing* [Online] Available from:
<<http://adventure.visitscotland.com/activities/water/surfing/>> [Accessed 28
September2005]

9.0 Bibliography

- Armstrong, G and Kotler, P. 2001. *Principles of Marketing* McGraw-Hill: USA
- Bagozzi, R,P. 2002. *The social psychology of consumer behaviour*. 5th ed. London: Buckingham Open University
- Baker, M. 2000. *The Marketing Book*, 4th Edition, Butterworth-Heinemann
- Berman, S. 2004. Media and Entertainment 2010 Scenario: The Open Media Company of the Future, *Strategy and Leadership*, Vol.32, No. 4, pp. 34-44
- Bernett, R. 1996. *The Global Jukebox: The International Music Industry*, London Routledge
- Boyd, H .W jr, Walker, O .C, Mullins, J, Larreche, J.C.2002. *Marketing Management: A strategic Decision-Making Approach* 4th Ed. McGraw-Hill Irwin: UK
- Clough, P and Nutbrown, C. 2002. *A students guide to methodology*. London: Sage Publications
- Cummins Inc. 2000. *The Influence of Light Weight Materials on Fuel Economy and Emissions in Heavy Duty Diesel Engine* [Online] Available from: <<http://www.osti.gov/fcvt/deer2000/beckerpa.pdf>> [Accessed on 9 March 2006]
- Dicitionary. 2005. *Online Dictionary* [Online] Available from: <www.dictionay.com> [Accessed on 23rd October 2005]
- DP Reviews. 2005. *Photography* [Online] Available from: <<http://www.dpreview.com/reviews/stats.asp>> [Accessed 22nd October 2005]
- Duane, D. 1997. *Caught Inside: a Surfers Year on the California Coast*. California: North Point Press
- Easey, M. 2002. *Fashion marketing edited by Mike Easey*. 2nd ed. Oxford: Blackwell Science
- Ensor, J and Drummond G. 2000 *Strategic marketing, planning and control*. Oxford: Butterworth Heinemann
- Ensor, J, Meek, H and Meek R. 2003. *Strategic marketing management planning and control* Oxford: Butterworth Heinemann
- George, S. 2003. *The perfect day: 40 years of "Surfer Magazine"*. California: Chronicle Books
- Gillham, W,E,C. 2000. *Developing a questionnaire*. London: Continuum
- Gratton, C. 2004. *Research Methods for Sports Studies*. London: Routledge
- Kampion, D. 2003. *Stoked: History of surf culture*. USA: Gibbs Smith Publishers
-

-
- Kampion, D and Petterson, J. 2005. *Waves: From Surfing to Tsunami*. USA: Gibbs Smith publishers
- Lyn, R. 2005. *Handling qualitative data, a practical guide*. London: Sage
- McColl, E. 2001. *Design and use of questionnaires a review of best practice applicable to surveys of health service staff and patients*. London: Routledge
- McDonald, M, H. 2002 *Marketing plans how to prepare them, how to use them*. Oxford: Butterworth-Heinemann
- Moran, D. 2000. *Introduction to phenomenology*. London: Routledge
- Proctor, T. 2000. *Strategic marketing: An introduction* London: Routledge
- Rao, C.P. 2000. *Globalization and its managerial implications* London: Quorum books
- Solomon, M,R. 2004. *Consumer behaviour in fashion*. Upper saddle river: NJ Prentice Hall
- Spethmann, B. 2001. *Profiles: GMR Marketing*. [Online] Available from: <http://promomagazine.com/mag/marketing_profiles_gmr_marketing/index.html> [Accessed on 3 March 2006]
- Thompson, J and Martin F. 2005. *Strategic management awareness and change*. 5th ed. London: Thomson
- Veal, A,J. 2005. *Research methods for leisure and tourism: a practical guide*. 3rd ed. London: Sage
- Webb, J.R. 1999 *Understanding and designing marketing research*. London: International Thomson Publishing company
- Wood, M.B. 2003. *The Marketing Plan* Prentice Hall: Australia
- Young, N. 1994. *History of surfing*. USA: Watersports books
-

10.1 Appendix A:

SURVEY QUESTIONNAIRE

United Kingdom Surfing Market

What is your level of surfing experience?

Advanced Average
Beginner

How often do you go surfing?

At least once a week once a month 1 to 4 times a
year

Your age?

Under 25 25 to 40 Over
40

Are you: Male Female

Are you from: The U.K Other

1. How do you feel about the surfing equipment you are currently using?

a. Your surfboard

b. Your surfing suit

c. Other equipment

2. What would have to happen to make your current equipment better?

3. What do you like best about surfing in the U.K.?

4. What do you like least about surfing in the U.K.?

5. Why do you surf in the UK?
