



SAMPLE PAGES



# 2009 Surfing Report July 2009

In his 2008 keynote address at the SIMA Surf Summit, one of Bob Hurley's major point was that "companies need to relentlessly focus on consumers...they are our boss."

For endemic and non-endemic companies selling products to consumers interested in surfing or the lifestyle that surfing represents, you need to understand your target consumer. And, the nuances associated with that consumer.

In our recent study, 58.5% of the participants were between the ages of 21 – 40 years of age. This, once again supports the trend that we've been reporting for the past several years: the surf market is aging. What are the businesses and brands targeting this consumer doing to address this aging phenomenon and the growth that accompanies it? What are retailers doing to cater to the over 25 year old surf market?

As a result of this aging market, over 58% indicated they ride both short and longboards. This may represent an opportunity for surfboard companies. (To find out what the size of market -- sales/units - is of the surf market in 2009, check out Board-Trac's Surf Size of Market Trend Report.)

The results of our study this year also show the attributes that appeal to a female surfer in their selection of a board are very different than their male counterparts. Understanding these differences can lead to better and more strategic marketing and promotional materials.

Overall, surf shops are the primary outlet for sales of wetsuits. However, did you know that females are more likely than males to purchase a wetsuit from a sporting goods store? Does your distribution strategy put your products in front of all your potential customers?

Sales of clothes, shoes and accessories via the internet have increased 125% since 2006. Do you have an internet strategy? And, in the past few years mass merchants and company branded stores are now competing for a share of the action sports consumer's apparel dollar.

What brands are your target consumers buying? Where are they buying? How often are they buying? And, how much are they paying?

You will find answers to all of these questions and much, much more in Board-Trac's 2009 Annual Surfing study. Bottom line, you need to understand your consumer in order to compete in this competitive market. The dynamics have changed in this once-cottage industry and now this surfing and surf lifestyle consumer is being sought by both endemic and non-endemic companies.



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# Introduction

## METHODOLOGY

The Surfing 2009 study was conducted during summer of 2009—surveys were collected during the period of June/ July 2009. A total of 732 surfers participated in the survey. Their ages ranged from 12 years to 60+ years old. More details regarding the demographics of the 2009 surfer can be found in Section 1, The Surfer.

Questions addressed on past and present behaviors, as well as current opinions.

The surfers were polled online via websites associated with the action sports industry. As an incentive to complete the study, participants were entered into a drawing for \$200 in cash or a new surfboard. The brand of the prize was not revealed.

## DATA ANALYSIS

Descriptive analytics were used for the information provided in this report. For the purposes of the analysis we cross-tabulate each one of the questions asked in the 2009 survey with three variables; gender, age and frequency of participation. We compared means and percentages and reported the significant differences of the cross-tabulated variables. For the mean comparison we applied t-tests and for the comparison of percentages we applied z-tests. All the results were based on two-sided tests with significance level 0.05. In other words, there is a 95% confidence that the reported differences between males vs females, each pair of age groups and frequent vs infrequent participants are actual and not due to chance.



# Section I: The Surfer

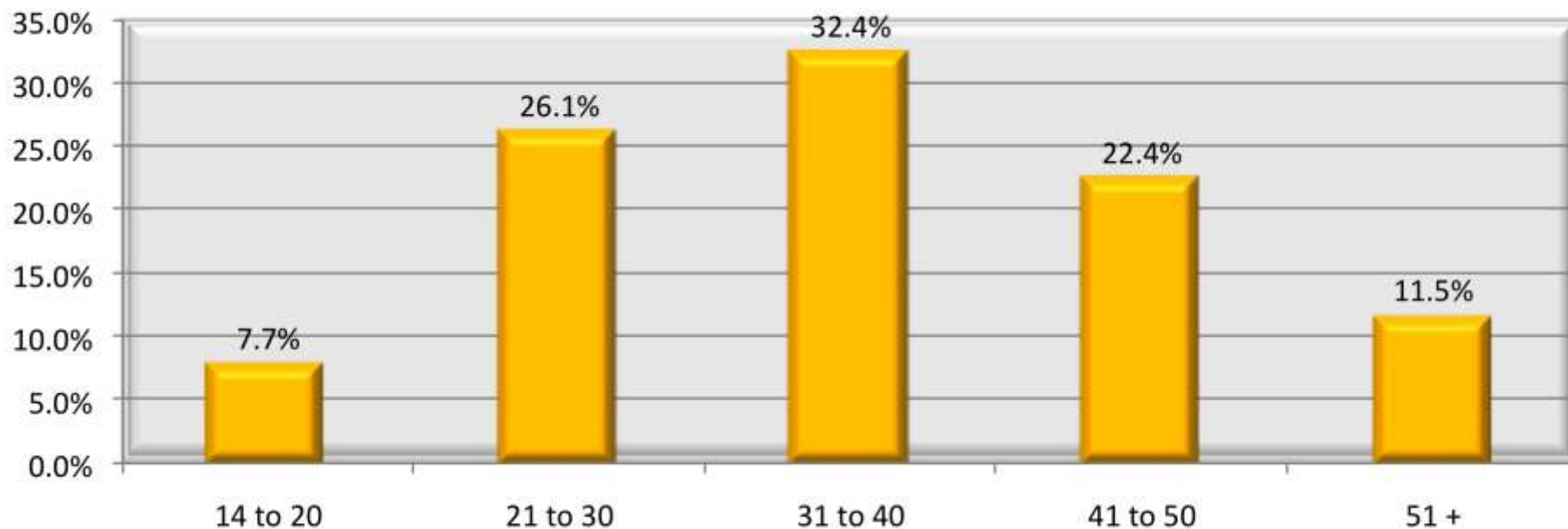
Section I of this report provides information about:

- Demographics (state of origin, gender and age).
- Frequency of participation and years of surfing experience.
- Types of surfing (shortboarder and longboarder).



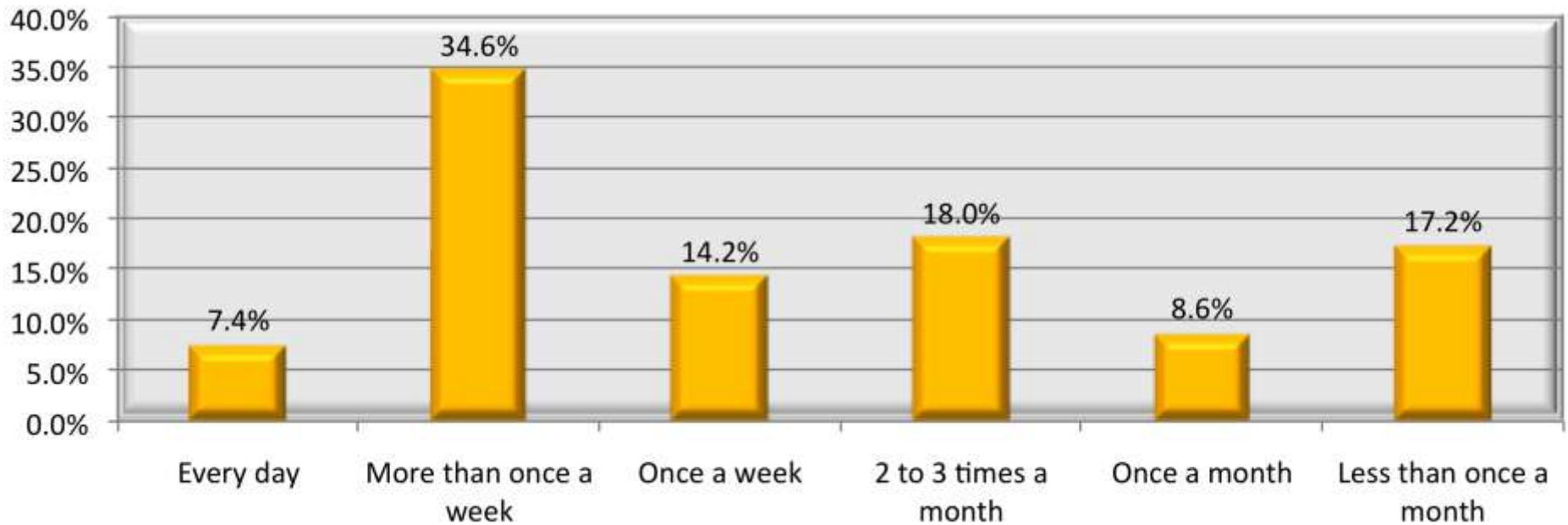
# Demographics, Age

- The distribution of age is presented in the chart below. The largest proportion of the participants are found in the 31 to 40 age group.
- The majority of the respondents are 31 years old or older. The trend towards the older participants continues this year as well. The percentage of participants that are older than 20 has been increasing since 2000.



# Frequency of Participation

- More than half of the participants (56.2%) of the 2009 study are frequent surfers (at least once a week).
- This pattern is consistent for the past three years in the Board-Trac studies.



# Section II: Hardgoods

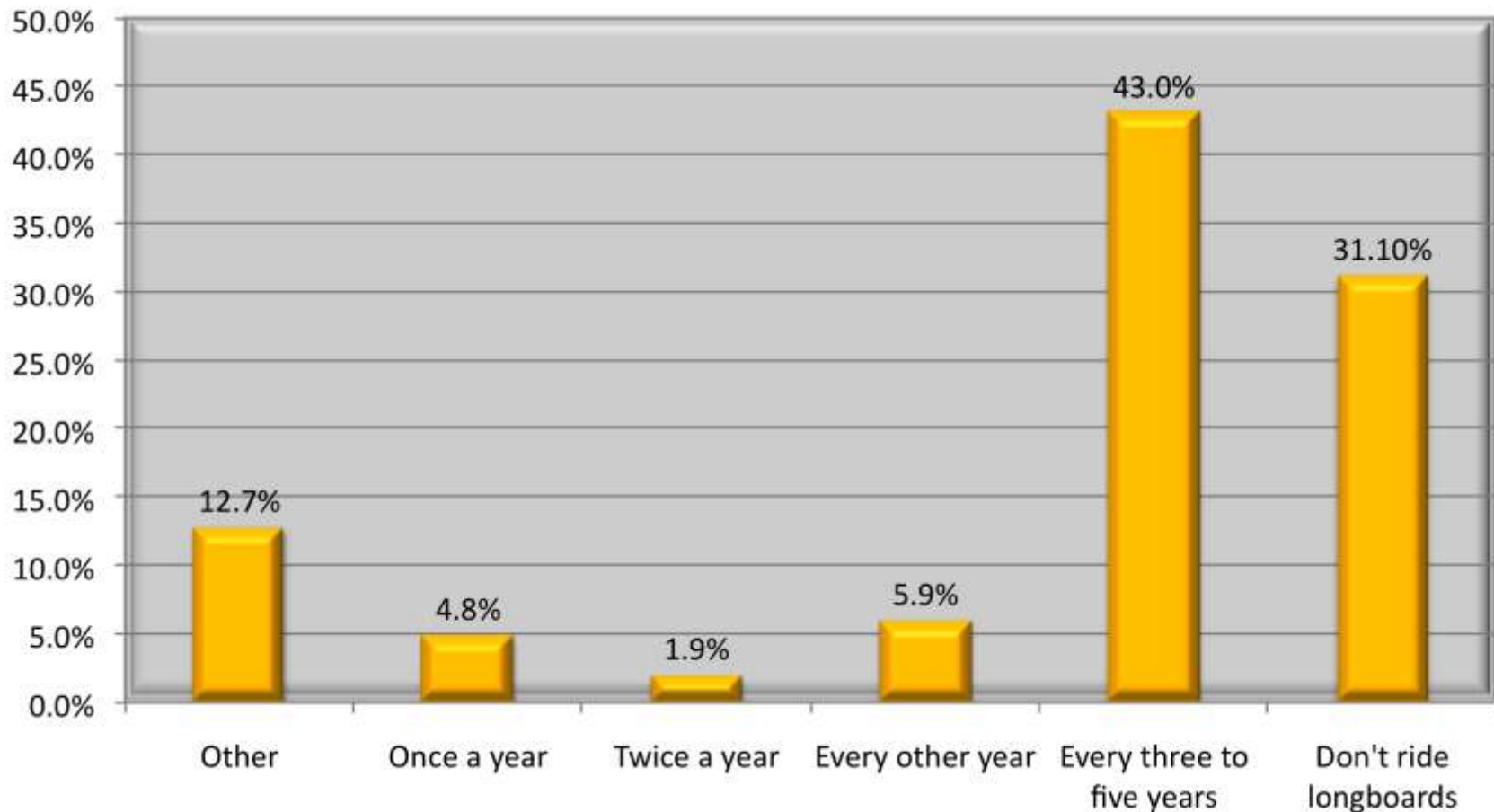
Section II of this report provides information about:

- Shortboards
- Longboards
- Wetsuits
- Traction Pads, Leashes and Wax



# Longboards, Frequency Of Purchase

- Most of the respondents reported that they buy longboards every three to five years (43%).
- As reported earlier, 31.1% reported that they don't ride longboards.
- The other responses, which accounted for 12.7%, included answers of less often than every three to five years.



# Section III: Softgoods

Section III provides information about:

- Clothes Shoes and Accessories
- T-Shirts
- Backpacks
- Board Shorts
- Shorts
- Jeans
- Shoes
- Sandals
- Sunglasses
- Watches



# Section IV: Lifestyle

Section IV of this report provides information about

- Music
- Participation In Other Sports
- Electronics
- Internet
- Magazines
- FUEL TV Awareness & Viewership



# Average Time Playing Games Per Week

- Most of the respondents in this study reported that they spend less than one hour of playing games per week.

