

Consumer Trends Report

January 2023



SECTION 1 - EXECUTIVE SUMMARY

SECTION 2 - INTRODUCTION

SECTION 3 - MARKET INDICATORS

- 3.1 - Outdoor Recreation - Participation & Value
- 3.2 Surfing and Windsurfing Participation in the United States
- 3.3 Surfing Participation in the United States
- 3.4 Surfing Participation in Australia
- 3.5 Surfing Participation in England
- 3.6 Pre-Covid International Surf Tourism Value
- 3.7 Surf Travel Behavior and Spending 2022 Data
 - 3.7.1 Pre-Covid (2019 and earlier)
 - 3.7.2 During-Covid lockdown and travel restriction period (2020 - 2021)
 - 3.7.3 Post-Covid lockdown and travel restriction period (2022)
 - 3.7.4 Length of Stay and Total Spend
- 3.8 A More Diverse Beginner Boom?
- 3.9 Key Takeaways

SECTION 4 - SURF PARK CONSUMER TRENDS

- 4.1 Shifting Surf Park Attitudes
- 4.2 Surf Park User Profile
- 4.3 Most Appealing Attributes of a Surf Park Experience
- 4.4 Preferred Wave Height
- 4.5 How Far Will Visitors Travel and How Often?
- 4.6 How long do surf park visitors want to stay?
- 4.7 How many companions are coming and how many are surfing?
- 4.8 Surf Park Rentals
- 4.9 Willingness to Pay for 10 Perfect Waves
- 4.10 Projected vs. Actual Daily Spend
- 4.11 Key Takeaways

SECTION 5 - SUSTAINABILITY & CONSUMER TRENDS IN SURF PARKS

- 5.1 Concern About Energy Efficiency of Wave Generating Technologies
- 5.2 Market Demand for Renewable Energy Use
- 5.3 Water Use and Conservation
- 5.4 Market Demand for Sustainable Surf Parks
- 5.5 Market Demand for Marine & Surf Break Conservation Education at Surf Parks
- 5.6 Opportunities to Connect With Marine and Surf Break Conservation Issues
- 5.7 Sustainability Factors Ranked by Importance to the Market
- 5.8 Market Willingness to Pay For Sustainability in a Surf Park
- 5.9 Key Takeaways

SECTION 6 - CONCLUSION

SECTION 7 - REFERENCES

FIGURES & TABLES

SECTION 2 - INTRODUCTION

Table 1: Attributes of Survey Participants 2015-2018

SECTION 3 - MARKET INDICATORS

- Figure 1. Outdoor Participation Growth Trends 2008-2021
- Figure 2. Outdoor Recreation Value
- Figure 3. Surfing & Windsurfing Participation in the US 2008-2021
- Figure 4. US Surfing Participation 2007-2021
- Figure 5. Australian Surfing Participation 2016-2021
- Figure 6. Surfing, Bodyboarding, Kite Surfing Participation in England 2016-2021
- Figure 7. Total Spend on Last Surf Trip

SECTION 4 - SURF PARK CONSUMER TRENDS

- Figure 8. Word Cloud. Main Concerns About Using a Surf Park 2015, 2016 & 2022
- Figure 9. Most Appealing Attributes of a Surf Park Experience
 - Table 2. Average Preferred Wave Heights Across User Groups 2022
- Figure 10. Preferred Wave Height 2015, 2016, and 2022 User Groups
- Figure 13. Willingness to Travel to a Surf Park
- Figure 14. How often would you visit a surf park?
- Figures 15 & 16. Likelihood of Staying Onsite Overnight & Accommodation Preferences
 - Table 3. Likelihood of Rentals Across User Groups 2022
- Figures 19 & 20. Likelihood of Wetsuit and Surfboard Rentals
- Figure 21. Willingness to Pay for 10 Perfect Waves 2015, 2016 & 2022 by Surfer Ability
 - Table 4. Average willingness to pay for 10 perfect waves and % change, 2015, 2016 & 2022
- Figure 22. 2022 Willingness to Pay for 10 Perfect Waves by Participant Group
 - Table 5. Projected Daily Spend
 - Table 6. Average Actual Daily Spend of Different Surf Park User Groups
- Figure 23. Surf parks visited by gender
 - Table 7. Average Actual Daily Spend at Each Surf Park
- Figure 24. Actual Daily Spend at Each Surf Park

SECTION 5 - SUSTAINABILITY & CONSUMER TRENDS IN SURF PARKS

- Table 8. Concern About Energy Efficiency of Wave Generation Technology
- Figure 25. Concern About Energy Efficiency of Wave Generating Technologies
 - Table 9. Use of Renewable Energy to Power Wave Generating Machines
- Figure 26. Market Demand for Renewable Energy Use
 - Table 10. Concern About Water Use and Conservation
- Figure 27. Market Concern about Water Use and Conservation
 - Table 11. Market Demand for Sustainable Surf Parks
- Figure 28. Market Demand for Sustainable Surf Parks
 - Table 12. Market Demand for Marine and Surf Break Conservation Education
- Figure 29. Demand for Conservation Education
 - Table 13. Opportunities to Engage With Environmental Conservation Issues
- Figure 30. Demand for Opportunities to Engage With Conservation Issues
- Figure 31. Surf Park Sustainability Factors Ranked by Strongly Agree Responses
 - Table 14. Relative Concern About Sustainability Issues in Surf Parks
- Figure 32. Willingness to Pay More for a Sustainable Surf Park Experience



EXECUTIVE SUMMARY



Photo courtesy of Surf Lakes

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This report draws from secondary and primary research in the form of three surveys conducted in 2015, 2016 and 2022 to trace evolving market conditions and consumer trends in the surf park sector. Secondary research identified market indicators, consumer trends and spending patterns are determined from longitudinal primary research.

For the first time, an in-depth analysis is conducted into how the surf park consumer is thinking about a range of sustainability topics in the specific context of the surf park industry.



INTRODUCTION

Section 2

The aim of this report is to aggregate the best publicly available information on the surf market and related market indicators and combine it with primary research conducted between 2015 and 2022 to provide valuable and actionable market intelligence for the surf park industry, and to track consumer trends in the surf park market over time.

Photo courtesy of Surf Lakes

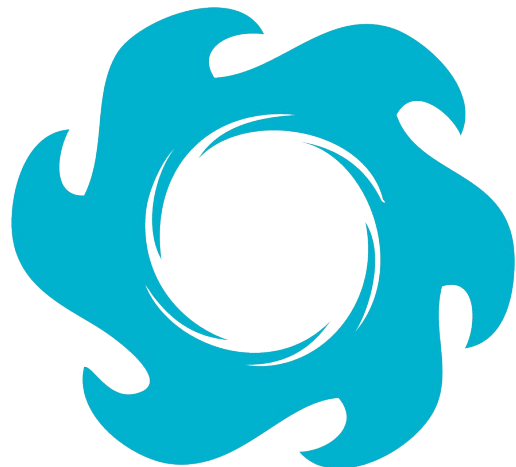
INTRODUCTION

In the 10 years since the first Surf Park Summit in 2013, the industry has grown slowly but steadily, moving from promising scale prototypes and computational fluid dynamics renderings to full scale commercial installations of a handful of new generation technologies in North and South America, Europe, Asia, and Australia.

The Covid pandemic beginning in late 2019 and causing global shutdowns from March 2020 negatively impacted open surf parks, caused the postponement of Surf Park Summit 2020, slowed the pipeline of pre-construction parks in development, and caused ongoing supply chain issues for surf parks in construction.

The surfing population is experiencing an unusually dynamic and transformative period.

An unexpected impact of the pandemic was a rapid spike in surfing participation around the world that saw unprecedented demand for surfing equipment and large numbers of new, more diverse surfers take up the sport as beaches reopened while gyms and indoor recreation options remained locked down. The surfing population is experiencing an unusually dynamic and transformative period and these trends will be explored in this report.



INTRODUCTION

Surf Park Central conducted its first survey of the surf park market in 2015, two years after the first Surf Park Summit was staged. At the time the most talked about surf park was Wadi Adventure in the UAE and the Wavegarden Lagoon test facility in the Basque Country of Spain.

The survey was conducted online to ask surfers questions related to demographics, surf attributes, surf travel information, technology and surf forecast use, surf pool desirability, and sustainability attitudes and actions. Data was collected using the Qualtrics online survey platform between May 1 and July 22, 2015 using a snowball sampling technique via direct contact, social media platforms, surf clubs and associations, and surf-brands' social media platforms to collect responses from self-ascribed surfers over 18 years-old where each respondent was asked to share the survey with other surfers.



Photo courtesy of SurfLoch

INTRODUCTION

In the five months following the collection of data in 2015 the surf park space was permanently transformed by the opening of the first commercial surf park using new generation technology in North Wales (Australia) in August (Surf Snowdonia) and the first public release of video showing the Kelly Slater Wave Company test facility in Lemoore, California (USA). Both developments, but particularly the latter, catalyzed a paradigmatic shift in the way the surfing public viewed surf parks. Before the KSWaveCo video, surf parks were compared favorably with waves in nature (e.g. Surf Snowdonia was compared favorably with a small, fun day at Greenmount on Australia's Gold Coast). After the video was released, almost instantly comparisons were inverted and waves in nature came to be compared to 'Kelly's Wave' as the new yardstick for perfect waves (Roberts and Ponting, 2018).

As a result, Surf Park Central's 2015 survey data aged quickly in terms of consumer attitudes towards surf parks and a follow up survey was undertaken between September and December 2016. To capture the changes the same set of questions from 2015 were repeated in 2016 and the same distribution technique and methodologies were employed.

Given the progress of the industry over the ensuing years and recent radical shifts in the surfing market driven by Covid related lockdowns and travel bans, a third survey was deployed between May 1 and September 30 2022. With the surf park market considerably more mature than in 2016 questions were updated and more tightly tailored to surf park consumer issues. The survey was comprised of 46 questions consisting of the following:

- **15 General surf travel behavior and spending questions**
- **3 Questions on specific surf park usage**
- **7 Questions on sustainability in surf parks and market willingness to pay for it**
- **13 Questions about surf park spending and service preferences**
- **8 Demographic questions**



The survey was distributed in English, Spanish, and Portuguese and a snowball sampling technique was again employed. Across all three surveys the following definitions were provided to participants to help guide their self assessment and sorting into the appropriate ability group:

- **Beginner (still learning);**
- **Intermediate (occasional surfer, limited experience);**
- **Experienced (regular surfer, competent in most wave conditions); and,**
- **Advanced (avid surfer, highly skilled, competent in challenging conditions)**

INTRODUCTION

Survey participants have remained largely similar over the three surveys, becoming marginally older, more male, more wealthy, and more skilled at surfing over time. See Table 1 for a breakdown of survey participant attributes across all three surveys.

TABLE #1 - ATTRIBUTES OF SURVEY PARTICIPANTS 2015-2018

ATTRIBUTE	2015 DATA	2016 DATA	2022 DATA
SAMPLE SIZE	3209	595	1028
GENDER BREAKDOWN	80%M - 20%F	86%M - 14%F	90%M - 10%F
AVERAGE YEARS SURFING	11-15	11-15	11-15
% BEGINNER	14%	10%	8%
% INTERMEDIATE	30%	28%	25%
% EXPERIENCED	47%	49%	54%
% ADVANCED	9%	13%	14%
AVERAGE AGE	26-34	26-34	35-44
AVERAGE HOUSEHOLD \$	\$75k - \$100k	\$75k - \$100k	\$100k - \$150k
AVERAGE #SURFBORARDS	4	4	4
WOULD USE A SURF PARK	78%	92%	99%
% SURF PARK USER	N/A	26%	33%

The changing attributes of survey participants over time is not reflective of changes in the surfer population captured by far more expansive and representative samples of specific geographies commissioned by government agencies, or Surfline who track data on around 5-million users. This represents a limitation of the data presented in this report.

