MOBIUM GROUP

Surf Clothing Market

Shopper Research

October 2018

patagonia®

Preamble

This research project was conducted by Mobium Group (Mobium) on behalf of the client; Patagonia.

Mobium is a member of the Australian Social and Market Research Society (ASMRS).

All research methodologies, data collection, analysis and reporting is conducted in accordance with the ASMRS Code of Conduct.

Rounding of the data set has been undertaken in the analysis. Readers should note this may cause a variation of +/- 1%.

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Key Findings – Surf Clothing Shoppers

A survey conducted in October 2018 of 1,006 Australians (aged 17-49) who had purchased surf clothing from nominated brands in the past year found that:

- most want companies to act on sustainability (87%) and are willing to change their purchasing to support brands that do (77%) but,

  the majority feel conflicted by their choices (66%), don't trust what companies tell them about their sustainability efforts (78%) and want clearer information about the environmental impacts of their product choices (71%)

- many have undertaken some action in support of an environmental cause. Donating (55%) and petitioning (45%) are the two most likely activities

- the number of surf clothing buyers incorporating sustainability consideration into their lifestyles (as measured by their values, concerns and actions in the LOHAS framework) is aligned to the Australian adult population when measuring those with the strongest intent and behaviour:
  - LOHAS Leaders: 16% of surf clothing buyers (16% of adult population)
  - LOHAS Leaning: 40% of surf clothing buyers (40% of adult population)

  but there are also more with limited engagement about sustainability aspects – LOHAS Laggards: 12% of surf clothing buyers (8% of adult population)

Key Findings – Surf Clothing Shoppers

- the profiles of each LOHAS segment of surf clothing buyers are highly diverse – but those who have surfed in the last year are more likely to have stronger sustainability alignment – Leader (54% surfer vs. 32% overall)
- staple items such as T's, caps and swimwear are the most popular surf clothing items bought in the past year and Billabong, Quiksilver and Rip Curl the most favoured brands as measured by claimed purchase, as well as nomination in spending a hypothetical $1,000 on a single brand
- more than ¾'s of all surf clothing buyers say they have purchased from both a physical and online retailer in the past 12 months. More buy from multi-brand retailers than single-brand – in both bricks and mortar stores and online
- when it comes to decisions about which products to buy, fit, value and quality are the primary choice drivers for surf clothing. Sustainability aspects are the least considered overall, with just over half saying it is important to them (20% 'very important' + 32% 'important')
- 30% of all surf clothing buyers say that they have previously bought an item because of its sustainability credentials - but 2 in 3 think it will be a more important decision factor for them in the future
- right now, using 'Cruelty free' materials in products (56%) is seen the most important sustainability factor. Reduced packaging levels (51%), Fairtrade sourcing (51%) and Petrochemical free (50%) also rate highly

Key Findings – Surf Clothing Shoppers

- thirteen percent of surf wear buyers think the industry currently has a strong emphasis on sustainability however 1 in 4 say that they are unaware if solid action is being taken.
    - 22% strongly agree that the industry should show leadership on sustainability matters;
    - 17% have a strong desire more information on what sustainability actions the surf industry is taking
    - 17% also say they would have a strong incentive to change brands based on sustainability action

- overall 75% want the surf industry to lead on sustainability but only 60% think it is actually doing so at present.

- most surf wear buyers cannot name a single brand with a strong reputation for being sustainable. Of those who could, Rip Curl had the most mentions. There is generally limited understanding of what major surf brands are doing to incorporate sustainability within their business

- nearly half of all surf clothing buyers believe that local environmental issues are the most important for surf companies to focus on. The key issue that they believe the surf industry should address is ocean protection and clean-up - pollution generally, and plastic specifically

- digital communications direct from brands, along with in-store activity are the preferred modes to receive information from the surf industry

Key Findings – Surf Clothing Shoppers and Patagonia

- more than 1/3rd of branded surf clothing buyers say that they had previously heard of Patagonia. Many currently associate the brand with 'outdoor' categories, not 'surf'
  - those aware of Patagonia skew male, are aged 20-39, receive higher incomes and have a higher likelihood of being surfers (51% vs 32%), as well as LOHAS Leaders (24% vs 16%)
- Patagonia's initial brand recognition is driven by physical exposure to product in stores (41%) and online (27%), as well as seeing people wearing the brand (27%). Referral by friends/family (25%) is another key catalyst.
- 42% of those who were aware of Patagonia say they have purchased (15% overall)
  - Compared to 'all respondents', Patagonia purchasers were:
    - more likely to be male and aged between 20 -39 years
    - much more likely to have an income over $100k pa (31% vs 19%)
    - more than twice as likely to be a 'LOHAS Leader' (36% vs 16%) or be in the 'Leaning' segment (48% vs 40%)
    - more than twice as likely to have 'surfed' in the last 12 months (71% vs 32%)
    - more willing to pay 25% more for products that were environmentally friendly (76% vs 50%)
    - more likely to have signed an environmental cause related petition (61% vs 45%), volunteered (60% vs 30%) and participated in a demonstration (54% vs 22%)
    - more than twice as likely to have considered sustainability when choosing a product (80% vs 35%) and have stronger beliefs that sustainability will be a stronger future impact on their choice of surf clothing (82% vs 67%)
- whilst Rip Curl, Quiksilver and Billabong are perceived by more people overall to have a strong commitment to sustainability than Patagonia, amongst Patagonia purchasers this is reversed, with Patagonia ranked top by them, for its commitment to sustainability relative to other brands

Key Findings – Surf Clothing Shoppers and Patagonia

- current Patagonia buyers are generally brand loyal. Nearly half say that they are regular shoppers of the brand, and over 80% in total purchase with some consistency
  - Given $1,000 to spend on one surf brand:
    - 20% of female purchasers of Patagonia products would allocate the cash to Patagonia (vs 4% of 'all respondents'), which is equal first with Rip Curl
    - 13% of male purchasers of Patagonia products would allocate the cash to Patagonia (vs 5% of 'all respondents'), which is third behind Quiksilver and Rip Curl

- large portions of current purchasers (28%) and those who have not yet bought (42%) say they have no barriers to future brand buying. For those with impediments, price is the key factor (44% for current buyers, 34% for those yet to purchase)

- the majority of current Patagonia customers have engaged with various brand assets and are aware of key brand initiatives. Those who have not bought yet have much lower connection rates
  - visited the Patagonia webpage (78% purchaser vs 25% aware but no purchase), Facebook page (58% vs 12%), Instagram page (50% vs 12%), subscribed to the online newsletter (50% vs 7%) or watched a film (46% vs 9%)
  - heard of 'Worn Wear' (54% vs 13%) and '1% for the Planet' (47% vs 19%)

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Project Background & Macro Objectives

Patagonia has an aspiration to grow significantly in the Australian surf and outdoor market.

At its 2017 strategy and planning workshop, it defined as its aspiration for the Australian market, to:

1. Become the largest e-com brand by market share in surf and outdoor in Australia and New Zealand
2. Achieve 100% penetration of Eco-Progressive market, and achieve $50m revenue
3. Accelerate the change of the Australia / New Zealand surf/outdoor industry to become eco-progressive
4. Place $1m in annual grants in line with our mission
5. Be the most profitable Patagonia region by EBIT %

Patagonia is now seeking to undertake research to gain a deeper understanding of the surf and outdoor gear and apparel market in Australia, with a particularly focus on its core eco-progressive consumer base, which in the Australian context, is best approximated by Mobium's LOHAS Leaders consumer segment.

The intent is to apply this research in support of multiple components of Patagonia's aspiration including:

- Gaining insights to help drive marketing efforts via Patagonia's direct retail channels (e-Comm and own-stores);
- Providing insights to assist current and potential Patagonia retail channel partners to better understand the consumer demand for Patagonia's brand proposition, and how it may fit alongside their other brands;
- Support Patagonia's aspiration to accelerate the change of the Australia / New Zealand surf/outdoor industry to become eco-progressive, by sharing selected insights with the broader surf industry, and encouraging surf industry players to incorporate more sustainable business practices into their own operations

Research Project Objectives

The specific research objectives of the project were to:

1. Support Patagonia's internal strategic planning by better understanding the Eco-Progressive / LOHAS surf clothing market in Australia

This will include:

- Mapping the relationship between consumers of surf clothing with Mobium's LOHAS consumer segments;
- Exploring the key environmental issues that LOHAS Leader and Leaning Australian consumers of surf clothing consumer are concerned about;
- Understanding the key drivers of brand choice, amongst LOHAS Leader and Leaning consumers of surf clothing;
- Identifying key categories of market participation (i.e. apparel products) and channels (retail / online / etc.);
- Gaining insights into consumers' expectations of surf brands in relation to the environmental performance of their products and their organisations / operations

2. Support Patagonia's commercial goals via development of a surf market research summary, for presentation by Patagonia to surf retail industry associations

3. Support Patagonia's industry goals, by providing a macro LOHAS overview for industry body and retail members

Research Project Audience and Questions

Mobium and Patagonia worked collaboratively to define the survey audience and question set:

Survey Specification

Total responses:	n=1,000
Gender:	~ 65% male / 35% female
Age:	17 – 49 years (17-19 n=100, 20-29 n= 300, 30-39 n= 300, 40-49 n= 300)
Location:	All states except NT, metro only, ideally <50kms from coast
Screen:	Must have purchased a defined surf product in the past 12 months (a wetsuit, boardshorts, bikini/swimwear, cap, T-shirt, rainwear, insulated jacket or gear bag/backpack and Must have purchased a defined surf brand in the past 12 months (any of Rip Curl, Quiksilver, Roxy, Billabong, O'Neil, Hurley, Volcom, RVCA, Afends, Vissla, Outerknown, Tigerlily, Thrills, Seafolly or Patagonia)

Questionnaire Development

A variety of question types were utilised to capture the agreed topic areas. These included closed response types such as single/multi choice, matrix and ranking questions, as well as open ended options where respondents could provide top of mind feedback in their own words.

To ensure all survey participants had a common frame of reference a definition of 'sustainability' was provided:

(The survey) also asks you to reflect on how important it is to you that surf brands provide products and operate in ways which are 'sustainable'. In this case we mean how surf brands and the surf industry generally, consider their people, suppliers, communities and the environment as part of their ongoing business operations, including the design and manufacture of their products.

When you are answering the questions about sustainability please consider these four aspects (people, suppliers, communities, environment).

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Sample Profile – Branded Surf Clothing Buyers

1,635 started

8% screen out – had not bought a defined product in last 12 months

35% screen out – had not bought a defined brand in last 12 months

1,006 qualified and completed survey

100% had bought at least one of the following items in the last year - a wetsuit, boardshorts, bikini/swimwear, cap, T-shirt, rainwear, insulated jacket or gear bag/backpack

and had bought them from any of Rip Curl, Quiksilver, Roxy, Billabong, O'Neil, Hurley, Volcom, RVCA, Afends, Vissla, Outerknown, Tigerlily, Thrills, Seafolly or Patagonia

NSW	33%
VIC	27%
QLD	20%
SA	7%
WA	11%
TAS	2%

Female	37%
Male	63%

AGE

17-19	10%
20-29	30%
30-39	30%
40-49	30%

Personal Income
(pre tax)

Under $40K	27%
$40-59K	17%
$60-79K	16%
$80-99K	12%
Over $100K	19%
No Answer	9%

Surfed in last 12 months
(Board, Bodyboard, SUP)

32%

A few times	58%
Monthly	29%
Weekly	10%
> once a week	3%

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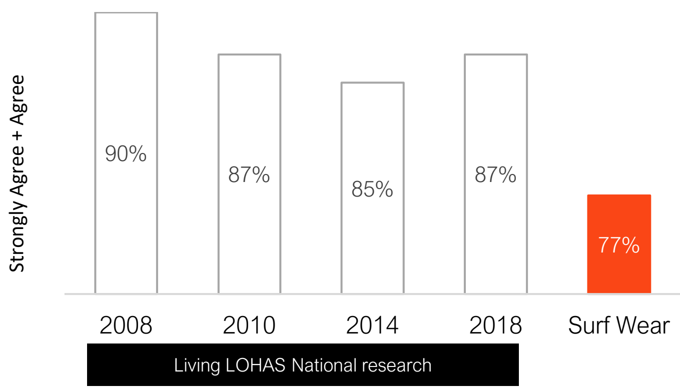
Most surf wear buyers want industry brands to act on sustainability and are willing to support brands that do, but the majority feel conflicted, don't trust them and want clearer information..

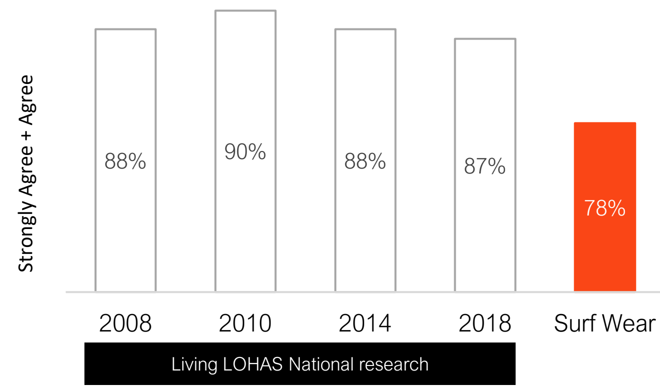
Statement	Total Agreement (Strongly Agree + Agree)	17-19	20-29	30-39	40-49	Female	Male
I believe that it is important for companies to consider the impact of their operations on the environment and community and not just make profits	87%	87%	84%	86%	91%	92%	84%
I am often sceptical about the health and environmental claims that companies make about their products and services	78%	76%	75%	78%	81%	79%	77%
The fact that a company cares about the impact of their activities on the environment and community gives me more incentive to buy their products or services	77%	83%	76%	77%	77%	84%	73%
I often find environmental issues complex and I would like clearer information about the environmental benefits and impacts of my product and service choices	71%	73%	72%	72%	69%	76%	69%
I feel conflicted by my desire to enjoy my current lifestyle, and my concern about the environmental impact of my purchasing choices	66%	64%	71%	66%	62%	68%	65%
I am willing to pay 25% more for products and services which are made in an environmentally friendly manner	50%	53%	56%	54%	39%	50%	50%

Surf clothing buyers are less likely than other Australian adults to reward companies for their sustainability actions, and less sceptical of the environmental claims that companies make..

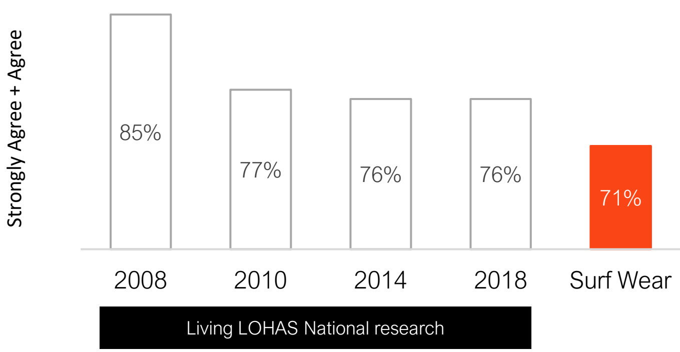
The fact that a company cares about the impact of their activities on the environment and community gives me more incentive to buy their products or services



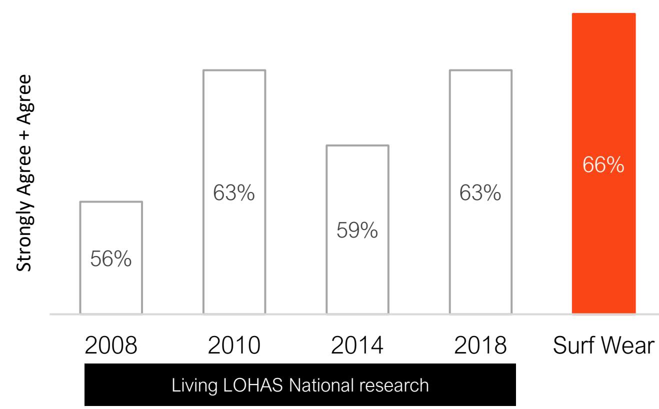
I am often sceptical about the environmental claims that companies make about their products and services



I often find environmental issues complex and would like clearer information about the environmental benefits and impacts of my product and service choices



I feel conflicted by my desire to enjoy my current lifestyle, and my concern about the environmental impact of my purchasing choices



Many surf clothing buyers have undertaken some action in support of an environmental cause. Donating and petitioning are the two most likely activities..

Have you ever…

	YES	17-19	20-29	30-39	40-49	Female	Male
Donated to an environmental organisation/cause	55%	50%	57%	61%	50%	59%	53%
Signed a petition for an environmental organisation /cause	45%	46%	44%	47%	45%	50%	43%
Volunteered for an environmental organisation / cause	30%	39%	34%	34%	20%	34%	28%
Participated in a demonstration about an environmental issue/cause	22%	29%	24%	24%	11%	21%	23%

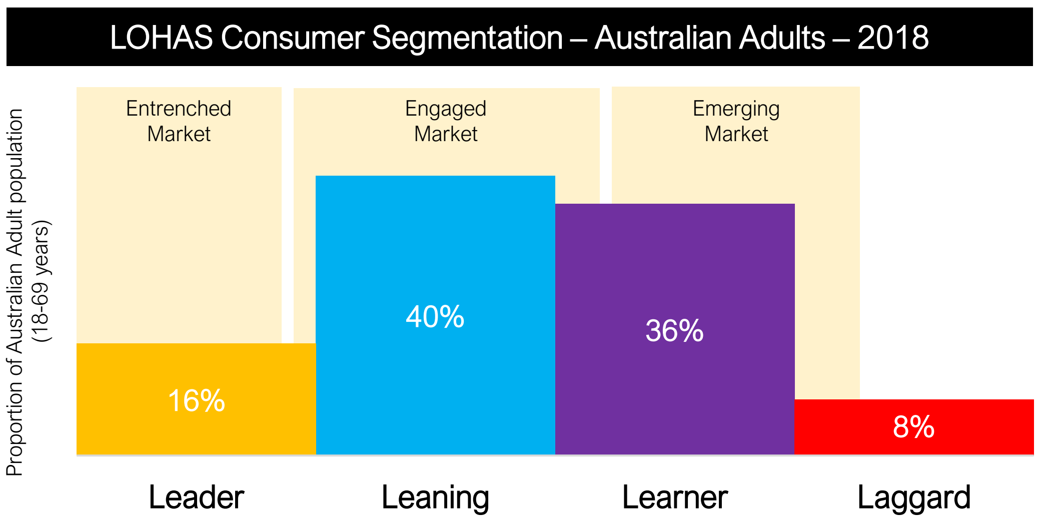
Using the LOHAS framework, individuals can be grouped based on their values and actions relating to personal, community and environmental health and wellbeing…

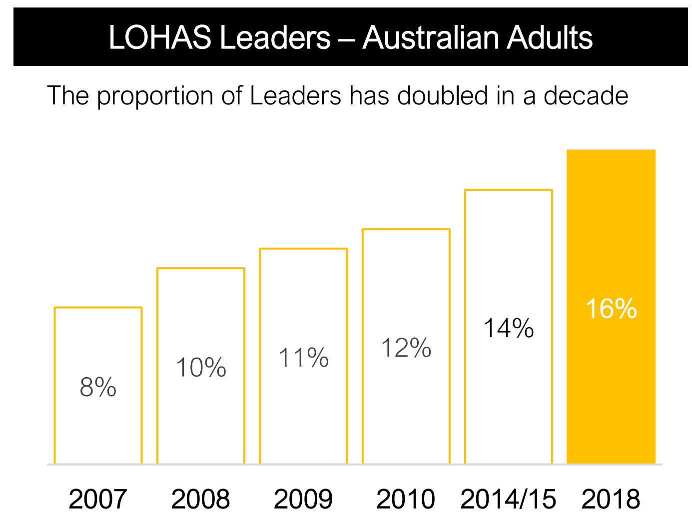
LOHAS stands for Lifestyles of Health and Sustainability..

- a marketing framework which describes a group of individuals who seek to integrate healthier, more sustainable product and service options into their lives
- identified by individuals values and world combined with their consistency of lifestyle and purchasing behaviour
- used for over a fifteen years in the USA, Europe and Asia

Mobium Group has been researching the LOHAS market in Australia since 2007 and has surveyed over 65,000 Australians about health & sustainability issues in the past decade.

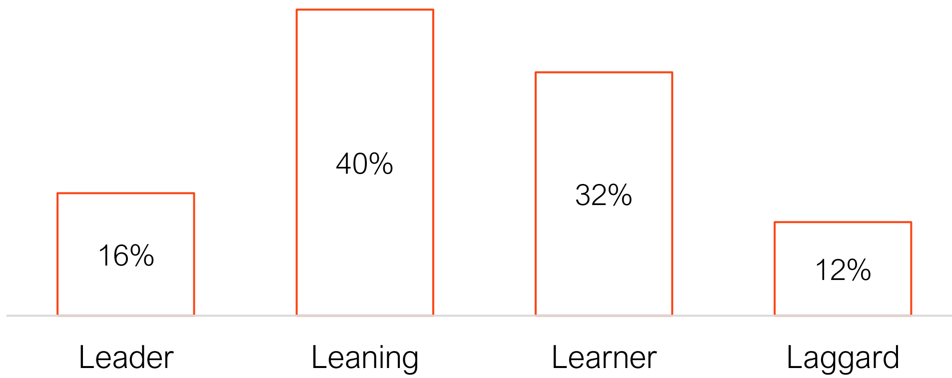
- *Living LOHAS* – a general population consumer research program – provides regular snapshots of consumer values, attitudes, concerns and market participation rates of the Australian adult population - including a four cluster segmentation analysis..



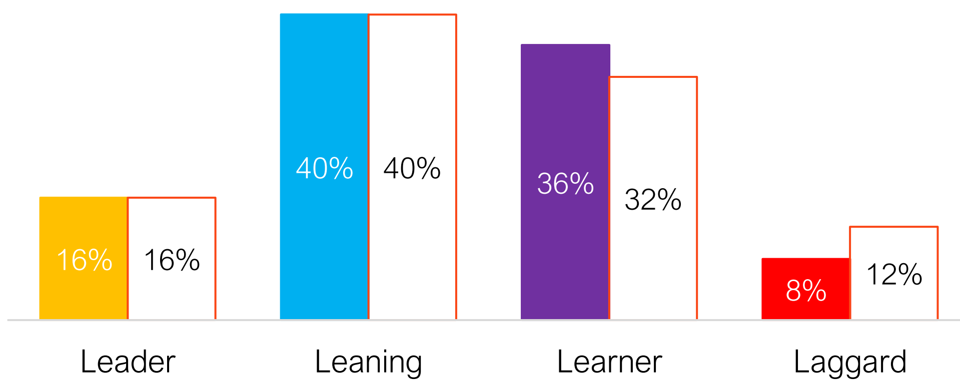


The LOHAS segment profile of surf clothing buyers shows similar numbers of Leaders and Learners to the Australian adult population, but there are more Laggards in the cohort..

LOHAS Consumer Segmentation – Surf Clothing Buyers – 2018



LOHAS Consumer Segmentation
Australian Adults vs. Surf Clothing Buyers – 2018



The profiles of each LOHAS segment of surf clothing buyers are highly diverse – but those who are surfers are more likely to have stronger LOHAS alignment..

Detailed breakdown: LOHAS Consumer Segmentation – Surf Clothing Buyers – 2018

	All	Leader 16%	Leaning 40%	Learner 32%	Laggard 12%
Female	37%	35%	39%	38%	30%
Male	63%	65%	61%	62%	70%
NSW	33%	37%	32%	33%	33%
VIC	27%	30%	28%	24%	26%
QLD	20%	15%	20%	24%	16%
SA	7%	6%	7%	7%	9%
WA	11%	11%	12%	10%	11%
TAS	2%	1%	1%	2%	5%
17-19	10%	9%	10%	13%	7%
20-29	30%	38%	29%	29%	24%
30-39	30%	33%	32%	27%	27%
40-49	30%	20%	29%	31%	42%
< $40K	27%	24%	25%	29%	30%
$40-59K	17%	13%	17%	16%	21%
$60-79K	16%	18%	18%	15%	11%
$80-99K	12%	17%	12%	11%	11%
> $100K	19%	24%	21%	17%	16%
Last year	32%	54%	36%	23%	14%

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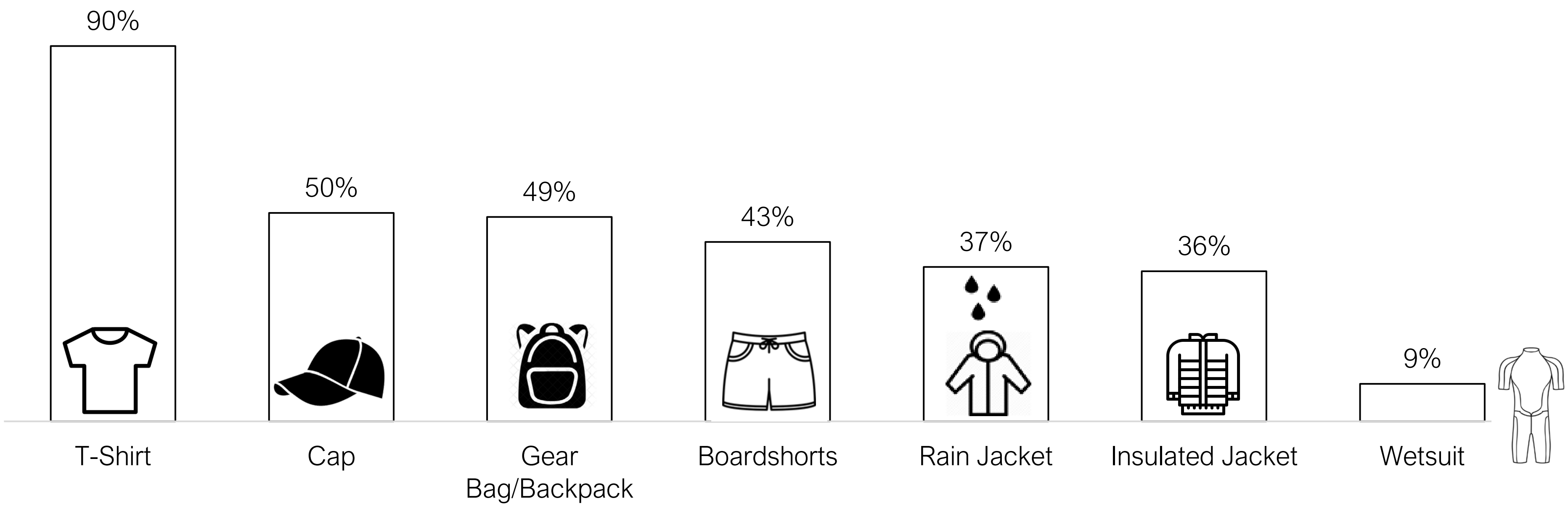
Males are most likely to have purchased non technical items of surf wear in the past 12 months. T's have almost universal participation then caps and gear bags..

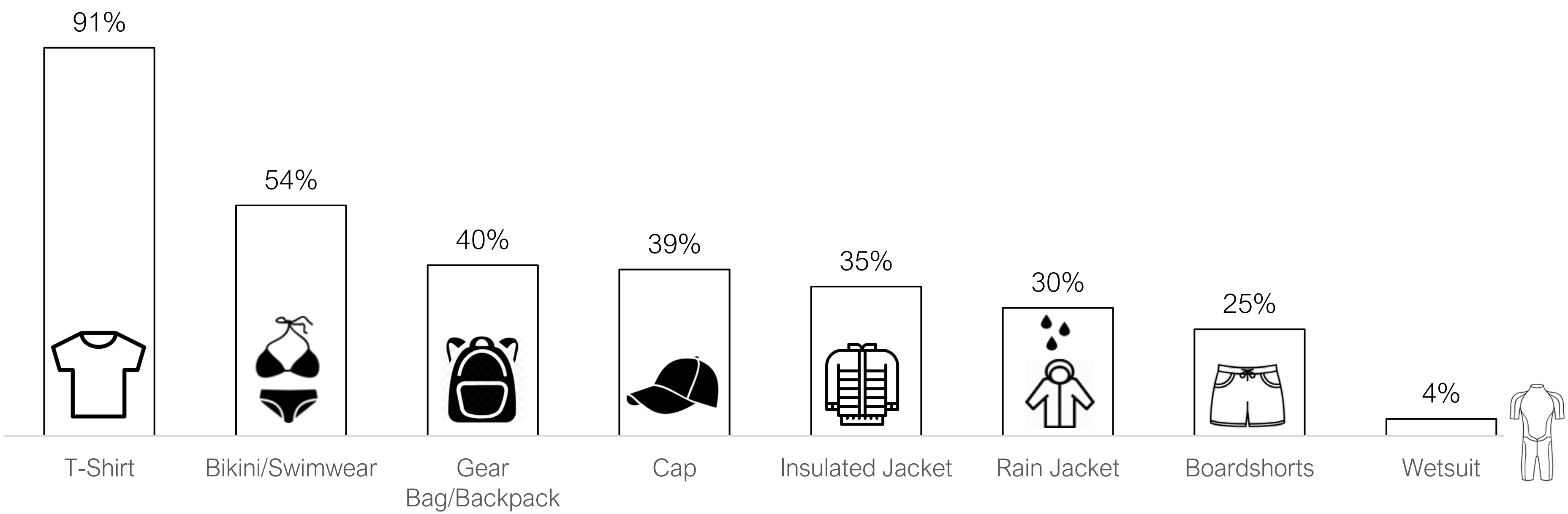
Please indicate which of the following items you have purchased in the past 12 months



AGE	Most	2nd Most	3rd Most
17-19	T-shirt 90%	Bag 60%	Cap 54%
20-29	T-shirt 90%	Cap 53%	Bag 53%
30-39	T-shirt 90%	Bag 49%	Boardy's 47%
40-49	T-shirt 89%	Cap 45%	Bag 42%

In the past 12 months female surf clothing buyers' 'go to' items were T-shirts, with more than 9 in 10 saying they purchased one, followed by swimwear and bags..

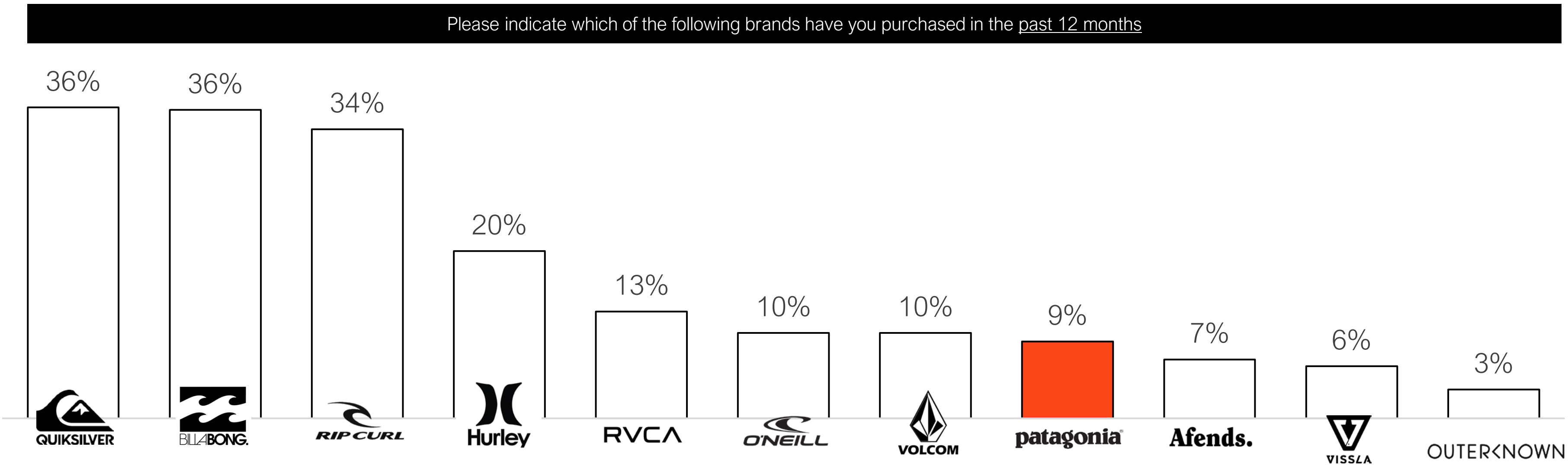
Please indicate which of the following items have you purchased in the past 12 months



AGE	Most	2nd Most	3rd Most
17-19	T-shirt 89%	Swim 62%	Bag 43%
20-29	T-shirt 89%	Swim 59%	Cap 40%
30-39	T-shirt 91%	Swim 52%	Bag 46%
40-49	T-shirt 93%	Swim 47%	Cap 44%

The most popular brands for male surf clothing shoppers in the past year were Quiksilver, Billabong and Rip Curl, with 1/3rd of shoppers buying an item from them..

Patagonia was purchased by 9% of males, ranking it equal 5th in terms of participation

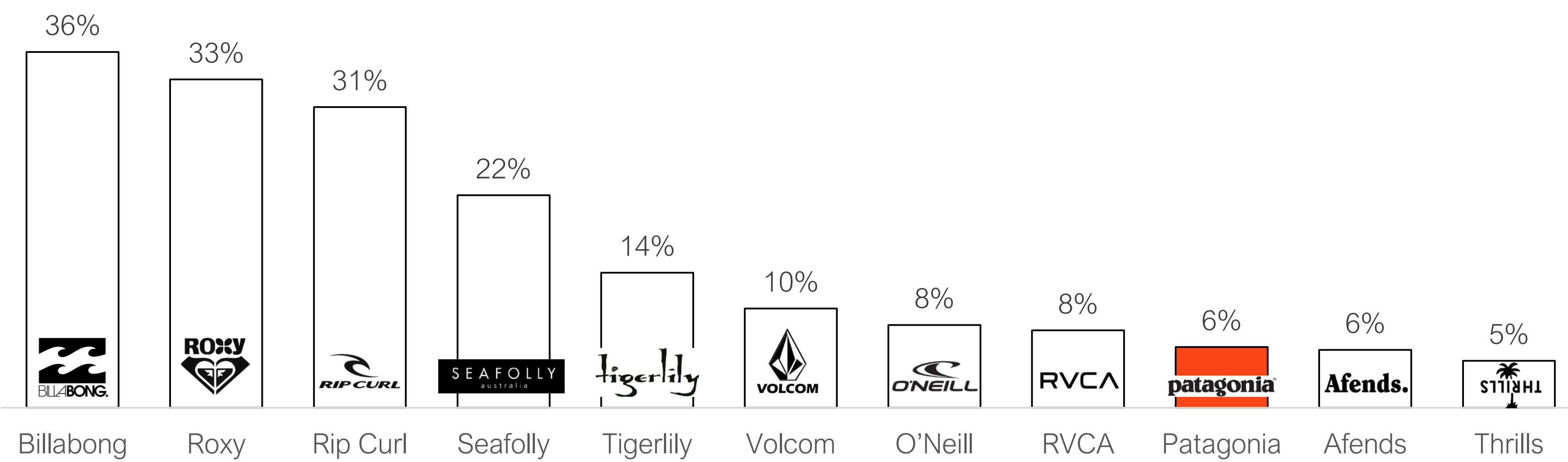


AGE Purchased	Most	2nd Most	3rd Most
17-19	Rip Curl 50%	Billabong 32%	Quiksilver 32%
20-29	Quiksilver 41%	Billabong 37%	Rip Curl 37%
30-39	Quiksilver 44%	Billabong 36%	Rip Curl 36%
40-49	Billabong 36%	Rip Curl 25%	Quiksilver 25%

The dominant female surf clothing brands were Billabong, Roxy and Rip Curl, each with a participation rate exceeding 30%. Seafolly and Tigerlily round out the top five..

Patagonia was purchased by 6% of females, 9th of the 12 brands reviewed

Please indicate which of the following brands have you purchased in the past 12 months

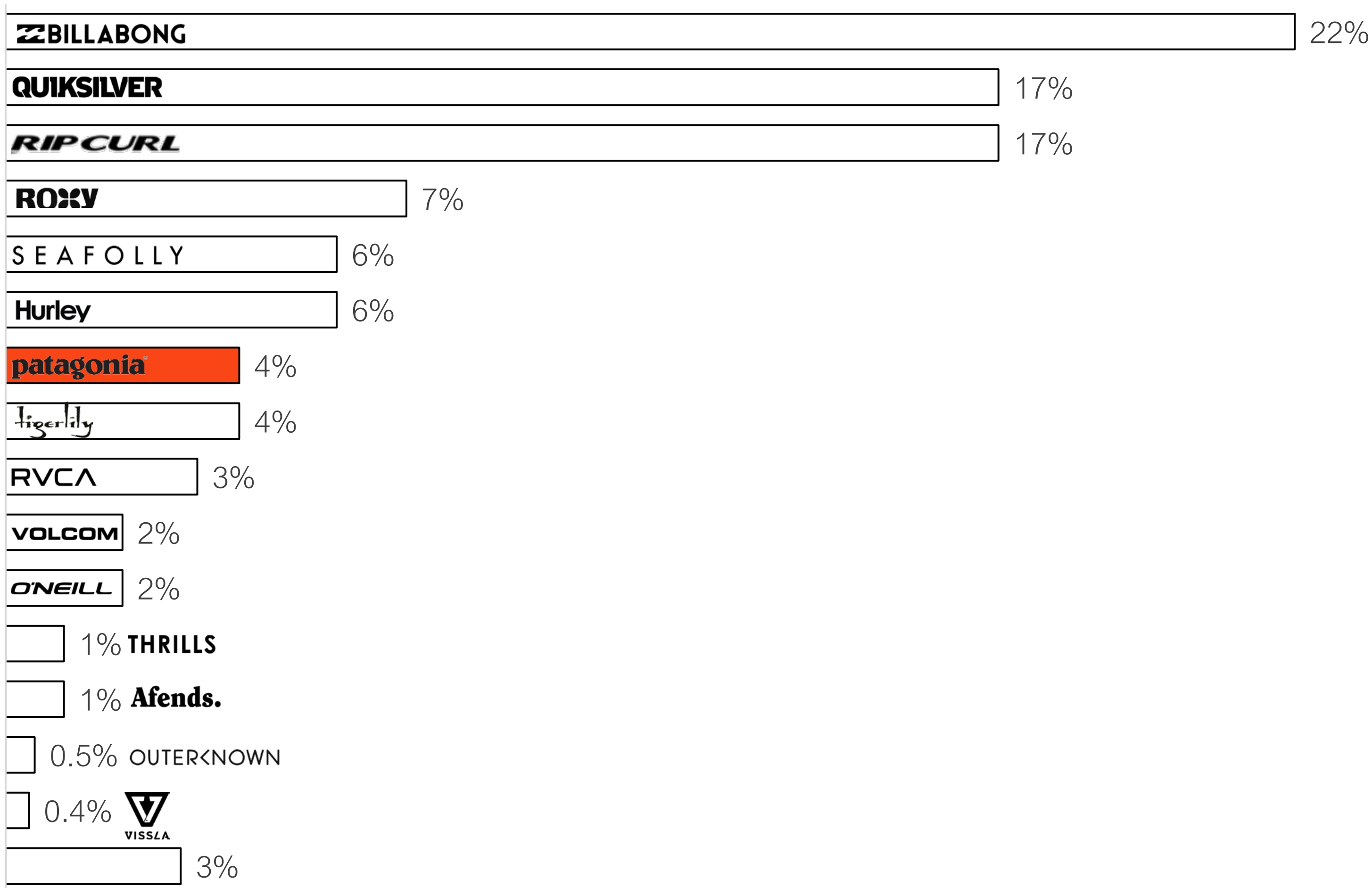


AGE Purchased	Most	2nd Most	3rd Most
17-19	Billabong 45%	Roxy 28%	Rip Curl 28%
20-29	Roxy 34%	Rip Curl 31%	Seafolly 28%
30-39	Billabong 43%	Roxy 40%	Rip Curl 30%
40-49	Billabong 34%	Rip Curl 32%	Roxy 28%

Amongst all surf clothing buyers, Billabong is the brand that most people would choose to spend $1,000 on. Quicksilver and Rip Curl are next most popular..

Patagonia was chosen by 4% overall, =7th ranked brand along with Tigerlily

Say you were given $1,000 to spend on surf clothing with just one brand. Which brand would you choose?



Males are most likely to spend $1,000 on Quiksilver, Billabong or Rip Curl – this is consistent across age groups. Patagonia ranks 5th overall with 5% support..

Rank	Brand	%
1	Quiksilver	23%
2	Billabong	20%
3	Rip Curl	18%
4	Hurley	8%
5	Patagonia	5%
6	RVCA	4%
7	Volcom	3%
8	O'Neill	3%
9	Afends	2%
10	Thrills	1%
11	Vissla	0.5%
12	Outerknown	0.5%
13	Some other	4%

17-19

Rank	Brand	%
1	Rip Curl	28
2	Quiksilver	18
3	Volcom	8

20-29

Rank	Brand	%
1	Quiksilver	26
2	Rip Curl	13
3	Billabong	12

30-39

Rank	Brand	%
1	Quiksilver	23
2	Billabong	22
3	Rip Curl	20

40-49

Rank	Brand	%
1	Billabong	29
2	Quiksilver	21
3	Rip Curl	18

Most females say that they would choose to spend $1,000 on Billabong. Next are Roxy, Seafolly and Rip Curl. Four percent chose Patagonia, placing it 7th overall..

Rank	Brand	%
1	Billabong	25%
2	Roxy	15%
3	Seafolly	15%
4	Rip Curl	14%
5	Tigerlily	8%
6	Quiksilver	7%
7	Patagonia	4%
8	Hurley	2%
9	RVCA	2%
10	Volcom	1%
11	Thrills	1%
11	Afends, O'Neil, Outerknown	<1%
12	Some other brand	2%

17-19

Rank	Brand	%
1	Rip Curl	23%
2	Billabong	22%
=3	Tigerlily/Seafolly	21%

20-29

Rank	Brand	%
1	Billabong	18%
2	Roxy	16%
3	Seafolly	16%

30-39

Rank	Brand	%
1	Billabong	28%
2	Roxy	22%
3	Seafolly	15%

40-49

Rank	Brand	%
1	Billabong	33%
2	Rip Curl	18%
3	Quiksilver	11%

More than ¾'s of all surf clothing buyers have purchased from both a physical and online retailer in the past 12 months. More buy from multi-brand retailers than single..

In the past 12 months have you purchased a surf clothing product from the following type of outlet:

YES

Multi-Brand physical retailer:	64%
Single-Brand physical retailer:	46%
Multi-Brand online retailer:	42%
Single-Brand online retailer:	34%

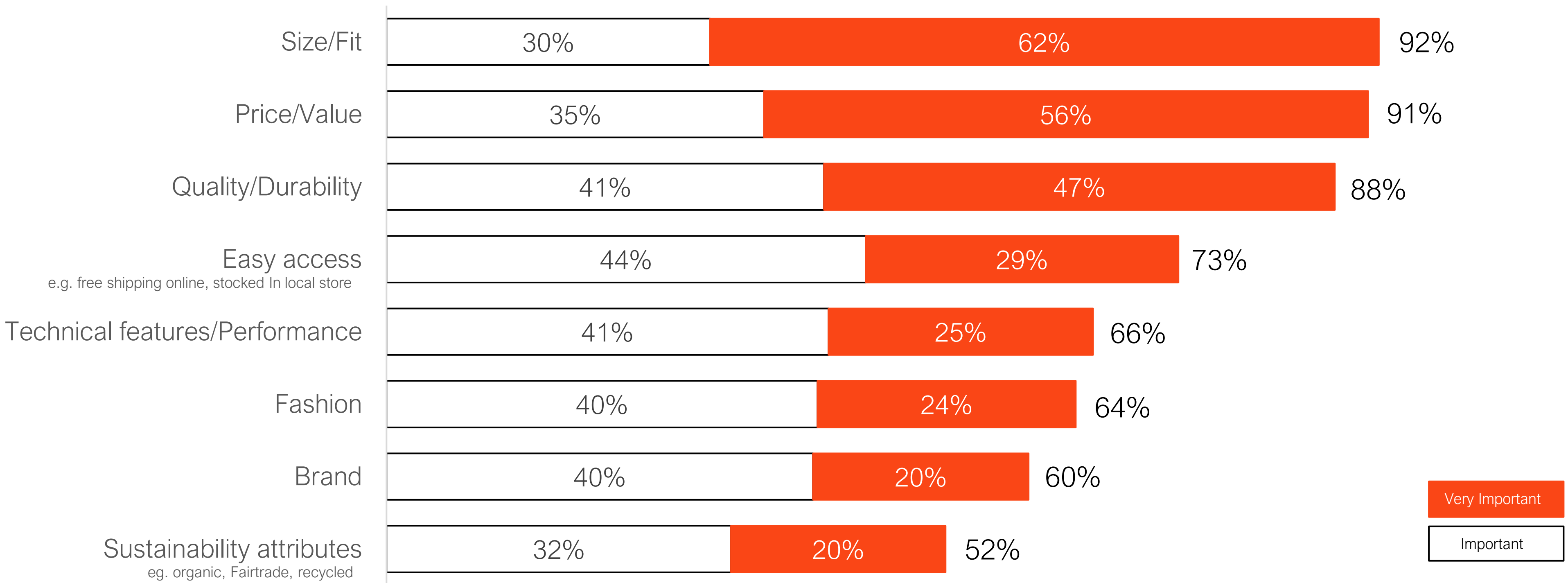
76%
purchased at both physical and online

AGE	Physical Retailer		Online Store		
	Multi	Single	Multi	Single	Both
17-19	64%	50%	45%	35%	81%
20-29	71%	51%	49%	43%	80%
30-39	67%	52%	47%	37%	81%
40-49	54%	34%	29%	21%	65%

	Physical Retailer		Online Store		
	Multi	Single	Multi	Single	Both
Female	64%	46%	38%	30%	76%
Male	64%	46%	44%	36%	76%

Fit, Value and Quality are the primary choice drivers for surf clothing. Sustainability aspects are the least considered, with just over 50% saying it is important to them..

When considering which surf clothing product to buy, how important are the following aspects to you in deciding which one to purchase?



AGE: V.I. + I.	Most	2nd Most	3rd Most
17-19	Size 92%	Price 87%	Quality 86%
20-29	Size 90%	Price 90%	Quality 86%
30-39	Price 92%	Quality 88%	Size 87%
40-49	Size 96%	Price 93%	Quality 90%

V.I. + I.	Most	2nd Most	3rd Most
Female	Size 93%	Price 93%	Quality 91%
Male	Price 91%	Size 90%	Quality 86%

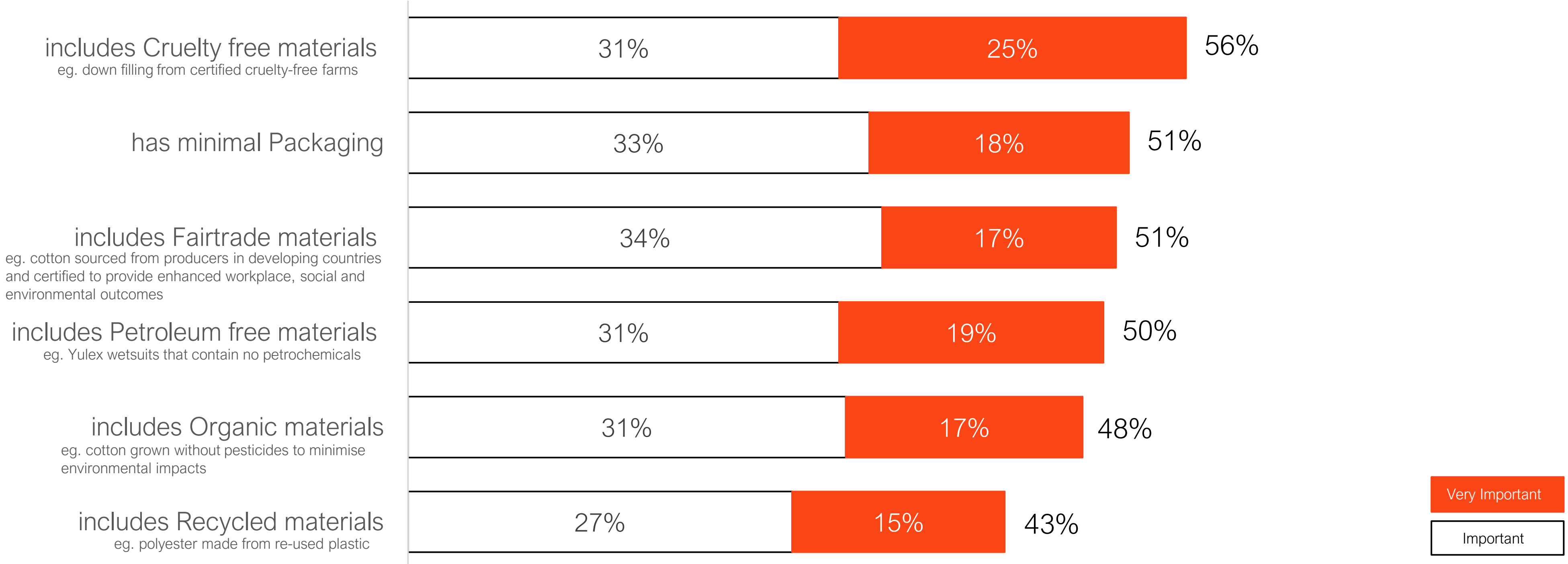
Aesthetic aspects such as colour, ‘look’ and style are important ‘other’ factors in choice. Australian made/country of origin are also in the frame for some..

5% indicated that other factors were important in their surf clothing product choices.

Word Cloud – Theme Summary

Across all cohorts, ‘Cruelty free materials’ is seen as the most important sustainability factor. Reduced packaging, Fairtrade sourcing and Petrochemical free also rate highly..

When considering which surf clothing product to buy, how important are the following aspects to you right now in deciding which one to purchase?



AGE

V.I. + I.	Most	2nd Most	3rd Most
17-19	Cruelty 58%	Petro 57%	Package 51%
20-29	Cruelty 59%	Fairtrade 55%	Package 55%
30-39	Cruelty 56%	Fairtrade 53%	Organic 52%
40-49	Cruelty 50%	Package 50%	Petro 46%

V.I. + I.	Most	2nd Most	3rd Most
Female	Cruelty 63%	Package 55%	Petro 52%
Male	Cruelty 51%	Fairtrade 51%	Package 49%

For those indicating other sustainability considerations, durability is a major theme along with supply chain, labour rights, materials and general social/environmental practices..

12% said that there were other sustainability factors that they took into consideration when purchasing surf clothing

Word Cloud – Theme Summary

30% of all surf wear buyers say that they have previously bought an item because of its sustainability credentials - but 2 in 3 think it will be a more important factor in the future..

Have you ever chosen a surf clothing product specifically because of its sustainability (such as organic, Fairtrade, recycled) attributes?

YES **30%**

AGE	17-19	20-29	30-39	40-49
	30%	43%	31%	15%

Female	Male
27%	31%

Five years from now, how important do you think sustainability aspects (organic, Fairtrade, recycled, cruelty free, petroleum free) will be in your decision making about which surf brand to purchase?

67%

More Important

Little More	More	Lot More
21%	25%	21%

AGE	17-19	20-29	30-39	40-49
Little More	25%	21%	21%	19%
More	23%	28%	25%	22%
Lot More	23%	21%	20%	22%
	71%	70%	65%	63%

	Female	Male
Little More	20%	21%
More	27%	23%
Lot More	24%	19%
	71%	64%

Contents

Thirteen percent of surf wear buyers think the industry currently has a strong emphasis on sustainability however 1 in 4 say that they are unaware if solid action is being taken..

- 22% strongly agree that the industry should show leadership on sustainability matters;

  and

- 17% have a strong desire more information on what sustainability actions the surf industry is taking

- 17% also say they would have a strong incentive to change brands based on sustainability action

Please indicate your agreement with the following statements:	Strongly Agree	Agree	Disagree	Strongly Disagree	Don't Know / Can't Say
I think that the brands in the surf industry currently have a strong focus on being sustainable	13%	47%	13%	4%	24%
It is important for the brands in the surf industry to demonstrate leadership in being sustainable	22%	53%	10%	3%	12%
I want to know more about what the brands in the surf industry are doing about being sustainable	17%	44%	18%	6%	14%
I believe that sexualised imagery of women in advertising and promotion is an issue that the surf industry needs to address	17%	36%	23%	12%	13%
I would change my purchasing to support brands who can demonstrate a commitment to being sustainable	17%	42%	18%	6%	17%
Brands in the surf industry should support/campaign on environmental and social issues	20%	50%	11%	6%	13%
Brands in the surf industry should engage Government on environmental and social issues	17%	46%	15%	5%	17%

Overall 75% want the surf industry to lead on sustainability but only 60% think it is actually doing so at present. Both genders and all ages are indicating an action gap..

Statement	Total Agreement (Strongly Agree + Agree)	17-19	20-29	30-39	40-49	Female	Male
It is important for the brands in the surf industry to demonstrate leadership in being sustainable	75%	80%	70%	78%	76%	78%	73%
Brands in the surf industry should support/campaign on environmental and social issues	70%	78%	68%	70%	71%	77%	67%
Brands in the surf industry should engage Government on environmental and social issues	63%	71%	62%	64%	60%	68%	60%
I want to know more about what the brands in the surf industry are doing about being sustainable	62%	64%	61%	63%	60%	67%	59%
I think that the brands in the surf industry currently have a strong focus on being sustainable	60%	59%	62%	64%	55%	57%	62%
I would change my purchasing to support brands who can demonstrate a commitment to being sustainable	59%	61%	58%	63%	55%	60%	59%
I believe that sexualised imagery of women in advertising and promotion is an issue that the surf industry needs to address	52%	55%	53%	53%	50%	59%	49%

Nearly half of all surf clothing buyers (and the majority of all ages and genders) believe that Local environmental issues are the most important for surf companies to focus on..

Environmental issues can be local, national or international. Please indicate which of these are most important for surf companies to focus on:

Most Important

47%	34%	19%
Local issues	**National** issues	**International** issues
(eg. pollution on beaches, logging of native forests)	(eg. protection of the Barrier Reef, oil drilling in the Great Australian Bight)	(eg. rising sea levels, climate change)

AGE

Most Important	17-19	20-29	30-49	40-49
Local	51%	48%	47%	46%
National	29%	33%	35%	34%
International	20%	19%	18%	20%

Most Important	Female	Male
Local	48%	47%
National	36%	32%
International	16%	21%

For surf wear buyers the most important issues for the surf industry to address mostly relate to ocean protection and clean-up - pollution generally, and plastic specifically..

What do you believe are the most important environmental / social issues that brands in the surf industry should tackle?

Word Cloud – Theme Summary

Most surf wear buyers cannot name a single brand with a strong reputation for being sustainable. Of those who could, Rip Curl had the most mentions. Patagonia ranked 4th..

556 answered (**55%** of the sample)

51% said they 'Didn't Know' or 'Not Sure'

42 brands mentioned unprompted

57% of nominated brands received just 1 mention

Please name any surf industry brands that you believe currently have strong reputations for operating in a sustainable manner:

Rank	Brand	Mentions
1	RIP CURL	96
2	BILLABONG	82
3	QUIKSILVER	39
4	patagonia	17
5	ROXY	16
6	Hurley	12
7	SEAFOLLY	7
8	RVCA	5
=9	Afends., VOLCOM, tigerlily	3

Brand	Mentions
Mambo, Nike, O'Neill, Outerknown, Panamuna Project, Thrills, The Green Wave	2
Adidas, Blabbing, CAVA, City Beach, Colombia, Dolphin, Dragon, Ecoboard, Element, Global Surf, Kathmandu, Modern Surf Board, Naked Boys, NANA, Notox, Otto & Spike, Piping Hot, Rapanui, Reef, Repisto, Rusty, Sea Shepherd, The Helpful Vegan, Thunderpants	1

And there is generally limited understanding of what major surf brands are doing to incorporate sustainability within their business…

For each brand, please indicate how much consideration you believe is currently being given by that organisation to the sustainability of their products and business operations:

	Strong Consideration	Moderate Consideration	Low Consideration	No Consideration	Don't Know / Can't Say
RIP CURL	18%	32%	13%	4%	33%
BILLABONG	18%	30%	15%	5%	32%
QUIKSILVER	16%	30%	13%	6%	34%
Hurley	12%	26%	17%	6%	38%
patagonia	12%	25%	14%	5%	44%
OUTERKNOWN	8%	20%	16%	6%	51%

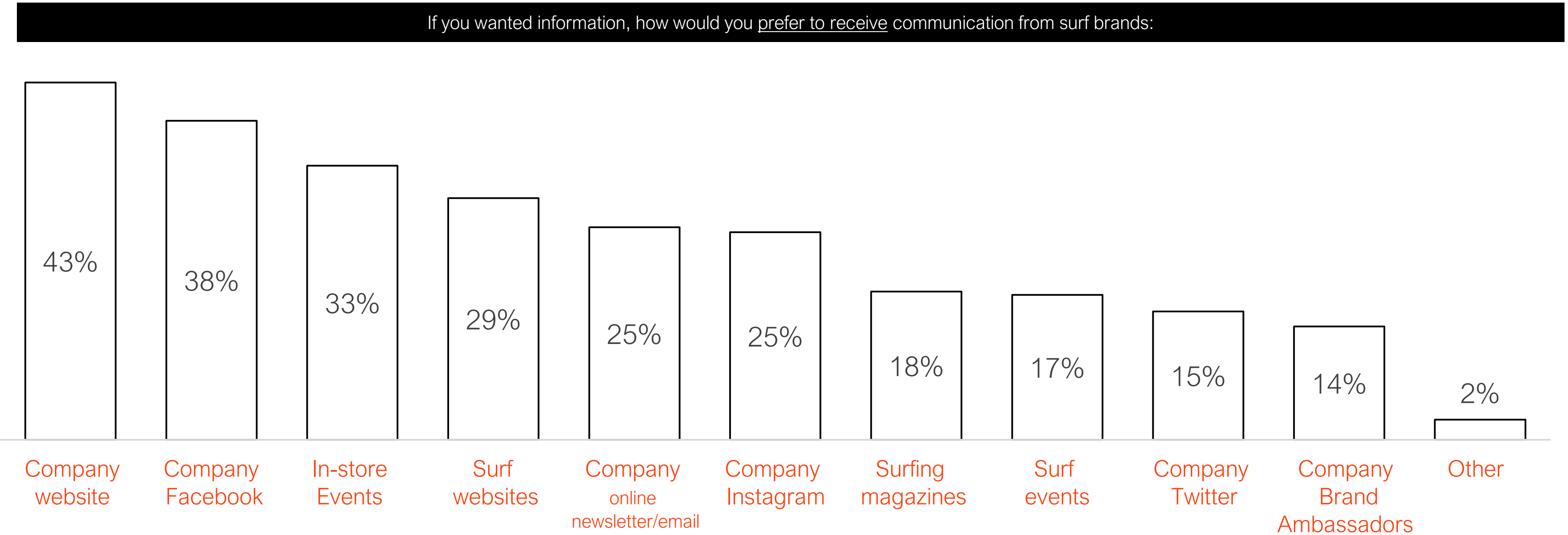
Don't Know / Can't Say

AGE

	17-19	20-29	30-39	40-49	Female	Male
RIP CURL	30%	24%	28%	46%	39%	29%
BILLABONG	30%	25%	27%	45%	38%	29%
QUIKSILVER	33%	26%	28%	47%	40%	30%
Hurley	37%	28%	33%	53%	45%	34%
patagonia	41%	33%	40%	60%	52%	39%
OUTERKNOWN	49%	40%	47%	66%	60%	45%

Digital communications, along with in-store activity direct from brands are the preferred modes to receive information from the surf industry…

All cohorts most prefer either company Facebook or website activity for communication



AGE	Most	2nd Most	3rd Most
17-19	Co. Web 47%	Co. FB 47%	Co. Insta 45%
20-29	Co. FB 41%	Co. Web 39%	Co. Insta 31%
30-39	Co. Web 42%	Co. FB 39%	In-store 33%
40-49	Co. Web 45%	Co. FB 31%	Surf Web 30%

	Most	2nd Most	3rd Most
Female	Co. Web 43%	Co. FB 41%	In-store 32%
Male	Co. Web 42%	Co. FB 36%	In-store 33%

Contents

More than 1/3rd of branded surf clothing buyers say that they had previously heard of Patagonia. Many associate the brand with outdoor categories, not surf…

Prior to taking this survey had you ever heard of the brand Patagonia?

YES 35%

AGE	17-19	20-29	30-39	40-49
	23%	42%	36%	30%

Female	Male
32%	37%

Younger and older cohorts, as well as females are less likely to be aware

Only those who have ever heard of Patagonia — Briefly, please indicate what you know about Patagonia?

21% said they 'Didn't Know' were 'Not Sure' or had only seen/heard the name

Word Cloud – Theme Summary

Those aware of Patagonia skew male, are aged 20-39, receive higher incomes and have a higher likelihood of being surfers, as well as LOHAS Leaders…

Prior to taking this survey had you ever heard of the brand Patagonia?

YES 35%

patagonia®

Aware Profile

State	
NSW	38%
VIC	26%
QLD	17%
SA	5%
WA	11%
TAS	3%

Gender	
Female	33%
Male	67%

Age	
17-19	7%
20-29	36%
30-39	31%
40-49	26%

Personal Income (pre tax)

Under $40K	18%
$40-59K	14%
$60-79K	20%
$80-99K	14%
Over $100K	33%
No Answer	8%

Surfed in last 12 months (Board, Bodyboard, SUP)

51%

A few times	52%
Monthly	32%
Weekly	12%
> once a week	3%

LOHAS

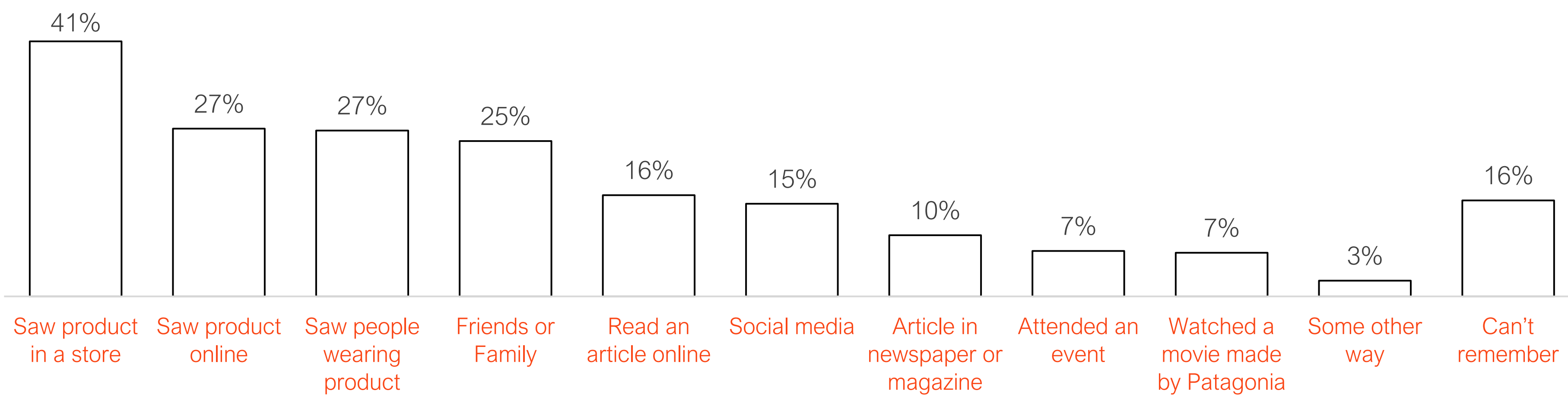
Leader	24%
Leaning	42%
Learner	24%
Laggard	10%

Under-Index 'All' Over-Index 'All'

Patagonia's initial brand recognition is driven by physical or virtual exposure to product in stores and online. Referral by friends/family is another key catalyst…

Only those who have ever heard of Patagonia

How did you first learn about Patagonia?



AGE

First Learned	Most	2nd Most	3rd Most
17-19	Friend 47%	Instore 42%	People 25%
20-29	Instore 46%	Online 32%	People 29%
30-39	Instore 40%	Online 34%	People 32%
40-49	Instore 38%	Cant say 31%	People 19%

First Learned	Most	2nd Most	3rd Most
Female	Saw instore 42%	Friend/Family 27%	Saw online 27%
Male	Saw instore 41%	People 28%	Saw Online 27%

Over 4 in 10 of those who were aware of Patagonia say they have purchased Patagonia. Patagonia buyers more likely to be male, aged 20-39 with a higher income

Furthermore, Patagonia customers are most likely to be surfers and have a strong LOHAS orientation

Only those who have ever heard of Patagonia

Have you ever purchased a Patagonia product?

42% Brand Aware

YES

15% Overall

patagonia®
Purchaser Profile

NSW	48%
VIC	22%
QLD	17%
SA	5%
WA	7%
TAS	1%

Female	31%
Male	69%

AGE

17-19	3%
20-29	42%
30-39	35%
40-49	16%

Personal Income (pre tax)

Under $40K	12%
$40-59K	14%
$60-79K	22%
$80-99K	16%
Over $100K	31%
No Answer	4%

Surfed in last 12 months (Board, Bodyboard, SUP)

71%

A few times	50%
Monthly	35%
Weekly	12%
> once a week	3%

LOHAS

Leader	36%
Leaning	48%
Learner	14%
Laggard	2%

Over 9 in 10 current purchasers say that they have purchased Patagonia product from both a physical store and online in the past..

Only those who have ever purchased Patagonia

Have you ever purchased a Patagonia product from:

YES

Multi-Brand physical retailer: 81%

Patagonia retail store: 61%

Multi-Brand online retailer: 59%

Patagonia online store: 55%

92%
purchased at both physical and online

AGE	Physical Retailer		Online Store		
	Multi	Pata	Multi	Pata	Both
17-19	60%	40%	40%	40%	60%
20-29	87%	59%	59%	56%	94%
30-39	75%	69%	71%	61%	92%
40-49	82%	57%	39%	43%	91%

	Physical Retailer		Online Store		
	Multi	Pata	Multi	Pata	Both
Female	78%	57%	50%	49%	89%
Male	82%	63%	63%	58%	93%

Current Patagonia buyers are generally brand loyal. Nearly half say that they are regular shoppers of the brand, and over 80% in total purchase with some consistency..

Only those who have ever purchased Patagonia

Patagonia is a brand I…

48%
Purchase
Regularly

34%
Purchase
Occasionally

18%
Purchase
Once in a while

AGE	17-19	20-29	30-49	40-49
Regularly	40%	49%	51%	39%
Occasionally	60%	31%	35%	35%
Once in a While	-	20%	14%	26%

	Female	Male
Regularly	41%	50%
Occasionally	35%	34%
Once in a While	24%	16%

Large portions of current purchasers and those who have not yet bought say they have no barriers to future brand buying. For those with impediments, price is the key factor..

Only those who have ever heard of Patagonia (including those who have purchased)

What, if any, are barriers to you buying a Patagonia surf products in the future:

28%

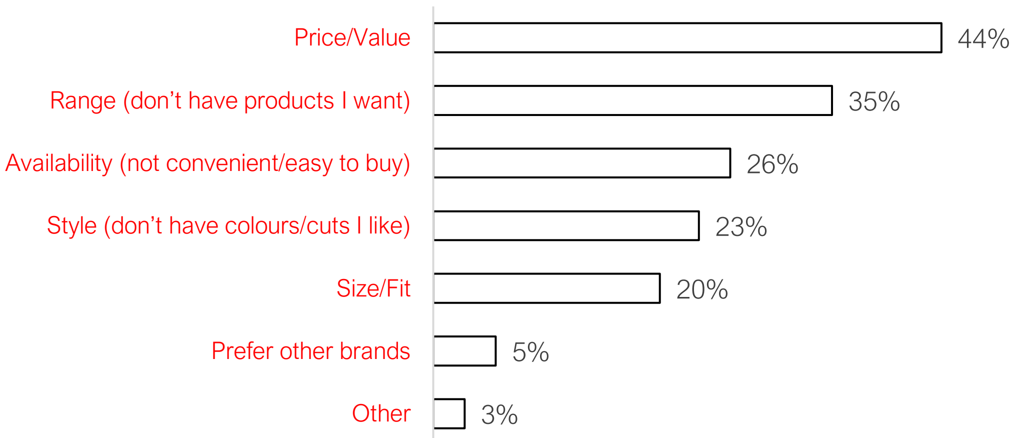
of those who have already purchased

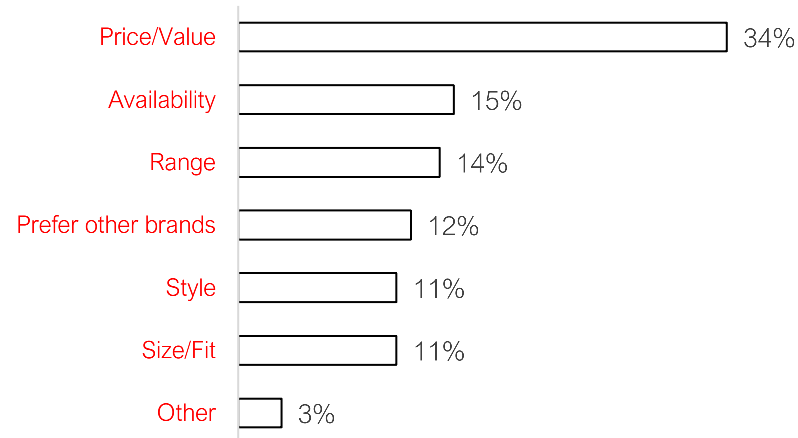
Nothing

Ready to buy if I need something

42%

of those who are aware but not purchased





The majority of Patagonia customers have engaged with various brand assets and are aware of key initiatives. Those who have not have much lower connection rates..

Only those who have ever heard of Patagonia (including those who have purchased)

Have you ever…

	Purchaser	Aware no Purchase
visited the Patagonia **website**	78%	25%
viewed Patagonia's **Facebook** page	58%	12%
heard of **'Worn Wear'**	54%	13%
subscribed to the Patagonia **online newsletter**	50%	7%
viewed Patagonia's **Instagram** page	50%	12%
heard of **'1% for the Planet'**	47%	19%
watched a film made by Patagonia (such as Reef Beneath, 180 degrees South, Nevertown, Takanya)	46%	9%

Contents

patagonia Buyer

15%

	Female	Male	17-19	20-29	30-39	40-49	<$40K	$40 -99K	>$100K	Leader	Leaning	Leaning	Laggard	Yes
All	37%	63%	10%	30%	30%	30%	27%	45%	19%	16%	40%	32%	12%	32%
Buyer	31%	69%	3%	46%	35%	16%	12%	52%	31%	36%	48%	14%	2%	71%

Sustainability Attitudes and Actions

Attitudes & Actions (Agree + Strongly Agree)	All	Buyer
> Incentive to purchase	77%	80%
Sceptical about claims	78%	82%
Would pay 25% more	50%	76%
Want clearer information	71%	78%
Donated to an enviro cause	55%	84%
Signed a petition	45%	61%
Volunteered	30%	60%
Participated in a demo	22%	54%

78%

I feel conflicted by my desire to enjoy my current lifestyle, and my concern about the environmental impact of my purchasing choices

Shopping for Surf Clothing

Product Choice Drivers (Important + Very Important)	All	Buyer
Size / Fit	92%	88%
Price / Value	91%	95%
Quality / Durability	88%	87%
Easy Access	73%	81%
Perform/ Features	66%	82%
Fashion	64%	78%
Brand	60%	80%
Sustainability Attributes	52%	73%

$1,000 to spend on one brand	All	Buyer
Male		
QUIKSILVER	23%	28%
RIP CURL	18%	18%
patagonia	5%	13%
Female		
patagonia	4%	20%
RIP CURL	14%	20%
Tigerlily	8%	13%

Sustainability Influence on Purchase Decision	All	Buyer
Ever influenced	35%	80%
More Important in Future	67%	82%
Lot More	21%	34%
More	25%	28%
Little More	21%	20%

Sustainability in the Surf Industry

Importance of Sustainability aspects in current decision making (Important + Very Important)	All	Buyer
includes **Cruelty Free** materials	56%	75%
has minimal **Packaging**	51%	78%
includes **Fairtrade** materials	51%	78%
includes **Petroleum free** materials	50%	76%
includes **Organic** materials	48%	82%
includes **Recycled** materials	43%	76%

Perception & Priorities for brands in Surf Industry (Important + Very Important)	All	Buyer
important to demonstrate Leadership	75%	84%
should support/campaign	70%	77%
should engage Government	63%	77%
want to know more about	62%	70%
current strong focus on sustainability	60%	82%
would change my purchasing	59%	69%
Sexualisation is an issue	52%	71%

Perception of Strength of Current Commitment to Sustainability (Strong Commitment)	All	Buyer
RIP CURL	18%	37%
BILLABONG	17%	31%
QUIKSILVER	15%	24%
Hurley	12%	22%
patagonia	12%	40%
OUTERKNOWN	8%	24%

Priority Focus areas for Surf Industry	All	Buyer
Local issues	47%	53%
National issues	34%	23%
International issues	19%	24%

Preferred Communication from the Surf Industry	All	Buyer
Co. website	43%	43%
Co. Facebook	38%	44%
In-store event	33%	42%

Engagement with patagonia

Ever Heard of prior to Survey	All	Buyer
Aware of Patagonia	35%	100%
Saw in a store	41%	50%
Saw product online	27%	37%
Friends/Family	27%	36%

Brand Interactions (only those 'Aware')	Buyer
visited the Patagonia website	78%
viewed Facebook page	58%
heard of 'Worn Wear'	54%
subscribed to online newsletter	50%
viewed Instagram page	50%
heard of '1% for the Planet'	47%
Watched a film by Patagonia	46%

Channel Participation (Ever Purchased Patagonia from)	Buyer
Multi-brand retail shop	81%
Multi-brand online store	59%
Patagonia retail shop	61%
Patagonia online store	55%

Barriers to Future Purchase	Buyer
Nothing – ready to buy	28%
Price / Value	44%
Range	35%
Availability	26%

Leader

16%

	Female	Male	17-19	20-29	30-39	40-49	<$40K	$40 -99K	>$100K	Yes
All	37%	63%	10%	30%	30%	30%	27%	45%	19%	32%
Leader	35%	65%	9%	38%	33%	19%	24%	47%	22%	54%

Sustainability Attitudes and Actions

Attitudes & Actions (Agree + Strongly Agree)	All	Leader
> Incentive to purchase	77%	89%
Sceptical about claims	78%	89%
Would pay 25% more	50%	80%
Want clearer information	71%	89%
Donated to an enviro cause	55%	81%
Signed a petition	45%	69%
Volunteered	30%	56%
Participated in a demo	22%	51%

80%

I feel conflicted by my desire to enjoy my current lifestyle, and my concern about the environmental impact of my purchasing choices

Shopping for Surf Clothing

Product Choice Drivers (Important + Very Important)	All	Leader
Size / Fit	92%	95%
Price / Value	91%	92%
Quality / Durability	88%	92%
Easy Access	73%	83%
Perform/ Features	66%	83%
Fashion	64%	79%
Brand	60%	74%
Sustainability Attributes	52%	84%

$1,000 to spend on one brand	All	Leader
Male		
QUIKSILVER	23%	30%
BILLABONG	20%	9%
RIP CURL	18%	27%
Female		
BILLABONG	24%	20%
ROXY	15%	16%
SEAFOLLY	15%	15%

Sustainability Influence on Purchase Decision	All	Leader
Ever influenced	35%	63%
More Important in Future	67%	85%
Lot More	21%	49%
More	25%	24%
Little More	21%	12%

Sustainability in the Surf Industry

Importance of Sustainability aspects in current decision making (Important + Very Important)	All	Leader
includes **Cruelty Free** materials	56%	85%
has minimal **Packaging**	51%	81%
includes **Fairtrade** materials	51%	90%
includes **Petroleum free** materials	50%	87%
includes **Organic** materials	48%	88%
includes **Recycled** materials	43%	78%

Perception & Priorities for brands in Surf Industry (Important + Very Important)	All	Leader
important to demonstrate leadership	75%	88%
should support/campaign	70%	87%
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Sexualisation is an issue	52%	76%

Perception of Strength of Current Commitment to Sustainability (Strong Commitment)	All	Leader
RIP CURL	18%	47%
BILLABONG	17%	45%
QUIKSILVER	15%	42%
Hurley	12%	33%
patagonia	12%	35%
OUTERKNOWN	8%	32%

Priority Focus areas for Surf Industry	All	Leader
Local issues	47%	44%
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International issues	19%	28%

Preferred Communication from the Surf Industry	All	Leader
Co. website	43%	42%
Co. Facebook	38%	38%
In-store event	33%	48%

Engagement with patagonia®

Ever Heard of prior to Survey	All	Leader
Aware of Patagonia	35%	54%
Saw in a store	41%	50%
Saw product online	27%	31%
Friends/Family	25%	36%

Brand Interactions (only those 'Aware')	Leader
visited the Patagonia website	73%
viewed Facebook page	56%
heard of 'Worn Wear'	54%
subscribed to online newsletter	48%
viewed Instagram page	50%
heard of '1% for the Planet'	58%
Watched a film by Patagonia	45%

Ever Previously Purchased	All	Leader
Ever Purchased Patagonia	15%	63%
Purchase Regularly	48%	68%
Purchase Occasionally	34%	25%
Purchase Once is a while	18%	7%

Barriers to Future Purchase	Leader
Nothing – ready to buy	33%
Price / Value	50%
Range	28%
Availability	21%

Leaning

40%

	Female	Male	17-19	20-29	30-39	40-49	<$40K	$40 -99K	>$100K	Yes
All	37%	63%	10%	30%	30%	30%	27%	45%	19%	32%
Leaning	39%	61%	10%	29%	32%	29%	25%	47%	21%	36%

Sustainability Attitudes and Actions

Attitudes & Actions (Agree + Strongly Agree)	All	Leaning
> Incentive to purchase	77%	86%
Sceptical about claims	78%	81%
Would pay 25% more	50%	66%
Want clearer information	71%	83%
Donated to an enviro cause	55%	59%
Signed a petition	45%	47%
Volunteered	30%	33%
Participated in a demo	22%	23%

73%

I feel conflicted by my desire to enjoy my current lifestyle, and my concern about the environmental impact of my purchasing choices

Shopping for Surf Clothing

Product Choice Drivers (Important + Very Important)	All	Leaning
Size / Fit	92%	90%
Price / Value	91%	94%
Quality / Durability	88%	86%
Easy Access	73%	74%
Perform/ Features	66%	72%
Fashion	64%	68%
Brand	60%	67%
Sustainability Attributes	52%	65%

$1,000 to spend on one brand	All	Leaning
Male		
QUIKSILVER	23%	21%
BILLABONG	20%	24%
RIP CURL	18%	18%
Female		
BILLABONG	24%	22%
ROXY	15%	15%
RIP CURL	14%	13%

Sustainability Influence on Purchase Decision	All	Leader
Ever influenced	35%	34%
More Important in Future	67%	69%
Lot More	21%	20%
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Little More	21%	18%

Sustainability in the Surf Industry

Importance of Sustainability aspects in current decision making (Important + Very Important)	All	Leaning
includes **Cruelty Free** materials	56%	64%
has minimal **Packaging**	51%	62%
includes **Fairtrade** materials	51%	64%
includes **Petroleum free** materials	50%	57%
includes **Organic** materials	48%	59%
includes **Recycled** materials	43%	55%

Perception & Priorities for brands in Surf Industry (Important + Very Important)	All	Leaning
important to demonstrate leadership	75%	78%
should support/campaign	70%	75%
should engage Government	63%	72%
want to know more about	62%	71%
current strong focus on sustainability	60%	71%
would change my purchasing	59%	70%
Sexualisation is an issue	52%	62%

Perception of Strength of Current Commitment to Sustainability (Strong Commitment)	All	Leaning
RIP CURL	18%	18%
BILLABONG	17%	17%
QUIKSILVER	15%	15%
Hurley	12%	12%
patagonia	12%	10%
OUTERKNOWN	8%	5%

Priority Focus areas for Surf Industry	All	Leaning
Local issues	47%	45%
National issues	34%	35%
International issues	19%	20%

Preferred Communication from the Surf Industry	All	Leaning
Co. website	43%	42%
Co. Facebook	38%	40%
Surf website	29%	32%

Engagement with patagonia

Ever Heard of prior to Survey	All	Leaning
Aware of Patagonia	35%	37%
Saw in a store	41%	37%
Saw product online	27%	35
Friends/Family	25%	27%

Brand Interactions (only those 'Aware')	Leaning
visited the Patagonia website	50%
viewed Facebook page	31%
heard of 'Worn Wear'	30%
subscribed to online newsletter	22%
viewed Instagram page	29%
heard of '1% for the Planet'	26%
Watched a film by Patagonia	23%

Ever Previously Purchased	All	Leaning
Ever Purchased Patagonia	15%	17%
Purchase Regularly	48%	39%
Purchase Occasionally	34%	40%
Purchase Once is a while	18%	21%

Barriers to Future Purchase	Leaning
Nothing – ready to buy	34%
Price / Value	38%
Range	23%
Availability	23%

Surfer

32%

	Female	Male	17-19	20-29	30-39	40-49	<$40K	$40 -99K	>$100K	Leader	Leaning	Leaning	Laggard
All	37%	63%	10%	30%	30%	30%	27%	45%	19%	16%	40%	32%	12%
Surfer	28%	72%	12%	35%	30%	22%	21%	48%	27%	26%	46%	23%	5%

Sustainability Attitudes and Actions

Attitudes & Actions (Agree + Strongly Agree)	All	Surfer
> Incentive to purchase	77%	83%
Sceptical about claims	78%	82%
Would pay 25% more	50%	63%
Want clearer information	71%	75%
Donated to an enviro cause	55%	76%
Signed a petition	45%	58%
Volunteered	30%	50%
Participated in a demo	22%	42%

71%

I feel conflicted by my desire to enjoy my current lifestyle, and my concern about the environmental impact of my purchasing choices

Shopping for Surf Clothing

Product Choice Drivers (Important + Very Important)	All	Surfer
Size / Fit	92%	89%
Price / Value	91%	92%
Quality / Durability	88%	88%
Easy Access	73%	75%
Perform/ Features	66%	78%
Fashion	64%	72%
Brand	60%	73%
Sustainability Attributes	52%	66%

$1,000 to spend on one brand	All	Surfer
Male		
QUIKSILVER	23%	25%
BILLABONG	20%	19%
RIP CURL	18%	21%
Female		
BILLABONG	24%	24%
ROXY	15%	18%
SEAFOLLY	15%	7%

Sustainability Influence on Purchase Decision	All	Surfer
Ever influenced	35%	56%
More Important in Future	67%	77%
Lot More	21%	28%
More	25%	29%
Little More	21%	20%

Sustainability in the Surf Industry

Importance of Sustainability aspects in current decision making (Important + Very Important)	All	Surfer
includes **Cruelty Free** materials	56%	65%
has minimal **Packaging**	51%	64%
includes **Fairtrade** materials	51%	66%
includes **Petroleum free** materials	50%	65%
includes **Organic** materials	48%	64%
includes **Recycled** materials	43%	56%

Perception & Priorities for brands in Surf Industry (Important + Very Important)	All	Surfer
important to demonstrate Leadership	75%	80%
should support/campaign	70%	76%
should engage Government	63%	73%
want to know more about	62%	72%
current strong focus on sustainability	60%	77%
would change my purchasing	59%	70%
Sexualisation is an issue	52%	63%

Perception of Strength of Current Commitment to Sustainability (Strong Commitment)	All	Buyer
RIP CURL	18%	33%
BILLABONG	17%	30%
QUIKSILVER	15%	29%
Hurley	12%	23%
patagonia	12%	22%
OUTERKNOWN	8%	17%

Priority Focus areas for Surf Industry	All	Surfer
Local issues	47%	50%
National issues	34%	29%
International issues	19%	21%

Preferred Communication from the Surf Industry	All	Surfer
Co. website	43%	45%
Co. Facebook	38%	46%
In-store event	33%	40%

Engagement with patagonia®

Ever Heard of prior to Survey	All	Surfer
Aware of Patagonia	35%	56%
Saw in a store	41%	45%
Saw product online	27%	31%
Saw people wearing	27%	31%

Brand Interactions (only those 'Aware')	Surfer
visited the Patagonia website	68%
viewed Facebook page	49%
heard of 'Worn Wear'	48%
subscribed to online newsletter	44%
viewed Instagram page	46%
heard of '1% for the Planet'	48%
Watched a film by Patagonia	41%

Ever Previously Purchased	All	Surfer
Ever Purchased Patagonia	15%	33%
Purchase Regularly	48%	63%
Purchase Occasionally	34%	29%
Purchase Once is a while	18%	9%

Barriers to Future Purchase	Surfer
Nothing – ready to buy	29%
Price / Value	37%
Range	32%
Availability	27%

Rejected Sample – Patagonia Awareness & Understanding

23% indicated that they had heard of Patagonia prior to the survey

64% did not answer or indicated they currently knew nothing about Patagonia

36% were able to provide feedback about what they currently knew about Patagonia

Briefly, please indicate what you know about Patagonia?

Word Cloud – Theme Summary

In the main Patagonia is associated with being an outdoor/adventure clothing brand.
There were no mentions of Patagonia being aligned with surf.