Surf culture, surfboard manufacturing & tourism synergies in the Illawarra

A culture of tourism innovation: thinking outside the box

Illawarra Futures Symposium
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Australian surf culture

- Surfing is a leisure activity, sport and lifestyle
- Beach & surf representing the Australian ‘spirit of place’
- Estimated 2.4 million recreational surfers (Surfing Australia)

Left to right: Dorothy Watson, Isabel Latham and Mary Sefton at Freshwater Beach, Sydney, 1916. (courtesy of Warringah Library)
Growth of the surf economy

• **1950s**: Formalised surfboard manufacturing industry (US & AUS)

• **1960/70s**: ‘Selling the surf’ – Clothing & apparel (Rip Curl, Quiksilver & Billabong)

• **1990s**: International surf tourism industry

• Surfing now a $12 billion a year global industry (Global Industry Analysts, 2011)

The development of Rip Curl from surfboard factory (top right) to global firm (bottom right)
Surfboard manufacturing industry

- **Pre/post WWII**: Backyard/DIY culture of board-making; surfing strongly attached to SLSA

- **1950s**: Beginnings of small workshops: Concentrated in Sydney’s Northern Beaches & Cronulla to the south

- **Early 1960s**: Global surf craze (convergence with popular culture) generates a larger commercial surfboard market

- **Mid-1960s**: Wollongong/Illawarra from sales agents & distributors for Sydney labels to locally independent manufacturers
Illawarra surfboard manufacturing

Enrolling local assets:

- Industry defined by the Illawarra’s world class surf breaks & large surfing community

- Historically a sustainable cultural industry servicing local market demand (customised production)

- **BUT** in 1970s Local makers found international recognition for innovative designs – opening of export opportunities

- Now a dozen local surfboard manufacturers; scales of economy range widely
Surfboard manufacturing industry

Defined by surfing’s cultural roots:

• Independent SME’s: non-corporatised
• Makers protective of skills & knowledge
• Informality in business relations (hand-shake agreements)
• Lack of training & succession planning (ageing workforce)
• The cottage industry tag vs. wider surf industry corporate road (Billabong etc)
Illawarra surfboard manufacturers

Economic challenges:
• GFC: Slump in export markets
• USA & Japan were the two biggest international markets
• Offshoring & automated production
Illawarra surfboard manufacturers

- Adaptability of Illawarra workshops:
- Resilience of local custom markets
- Maintaining some domestic retail markets
  - Place & brand association strong in the Illawarra
  - (E.g. Byrne, Skipp & Dylan Surfboards)
Synergies with surf tourism

- **1 in 10** international visitors to NSW include surfing as part of planned activities (250,000 people)

- NSW as primary surf tourism destination for international visitors (50%)

- Sydney & Byron Bay the most popular destinations (access, climate, fame)

- Recognised north coast surf tourism circuit **BUT ALSO:**
Synergies with Illawarra surf tourism

- Growth in local surfboard sales to surf tourists & international students (retail stores and direct from factory as the information hub)

- Capitalising on local surfing assets (natural/cultural)

- National Surfing Reserve: Killalea/Mystics part of a southern surf tourist circuit
Synergies with Illawarra surf tourism

• Surfboard industry highlights opportunities for tourism to sustainably utilise natural & cultural assets

• High surf appeal of the Illawarra/South Coast: Less crowded & quality breaks

• Surf tourism as connected to & complimenting other activities

E.g. flow on effects and synergies with surfboard manufacturing, surf schools etc.