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The impact of brand image on French customer loyalty in the surf industry

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Master in Marketing

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Resumo

Esta investigação explora a relação entre a imagem de marca e a lealdade do consumidor na indústria francesa do surf, um sector com uma forte identidade cultural que combina prática desportiva, estilo de vida e compromisso social. Através de um estudo quantitativo com 204 inquiridos, esta dissertação analisa as dimensões específicas da imagem de marca que mais influenciam a lealdade, as variações de perceção segundo os segmentos de consumidores e o papel dos valores socioculturais nesta relação.

Os resultados revelam que o reconhecimento da marca, a qualidade percebida, a autenticidade e a emoção são os principais factores de lealdade. Mostram também que a perceção da imagem varia consoante o nível de surf, a geração, a frequência de compra e o grau de compromisso ecológico. Finalmente, o alinhamento entre os valores pessoais dos consumidores e os valores transmitidos pelas marcas está a emergir como uma alavanca estratégica para criar uma ligação duradoura, particularmente com as gerações mais jovens e os consumidores empenhados.

Esta tese contribui para a literatura sobre brand equity num contexto de nicho, destacando a necessidade de as marcas de surf adoptarem uma abordagem diferenciada, autêntica e consistente com as expectativas dos seus segmentos-alvo. Faz também recomendações de gestão concretas para reforçar a lealdade através da imagem percepcionada e sugere caminhos para investigação futura.

Palavras-chave: Lealdade do consumidor; imagem de marca; marketing de nicho; surf; valores socioculturais; compromisso ecológico; segmentação geracional.

Abstract

This research explores the link between brand image and consumer loyalty in the French surfing industry, a sector with a strong cultural identity combining sporting practice, lifestyle and social commitment. Through a quantitative study of 204 respondents, this dissertation analyses the specific dimensions of brand image that most influence loyalty, the variations in perception according to consumer segments, and the role of socio-cultural values in this relationship.

The results reveal that brand recognition, perceived quality, authenticity and emotion are key drivers of loyalty. They also show that image perception varies according to surfing level, generation, frequency of purchase and degree of ecological commitment. Finally, the alignment between consumers' personal values and those conveyed by brands is emerging as a strategic lever for creating lasting attachment, particularly with younger generations and committed consumers.

This thesis contributes to the literature on brand equity in a niche context, highlighting the need for surf brands to adopt an approach that is differentiated, authentic and consistent with the expectations of their target segments. It also makes concrete managerial recommendations for strengthening loyalty through perceived image and suggests avenues for future research.

Keywords: Consumer loyalty; brand image; niche marketing; surfing; socio-cultural values; ecological commitment; generational segmentation.

JEL Classification

M31 - Marketing

M37 - Advertising

Z10 - Sports and leisure: general

D12 - Consumer behaviour: empirical theory

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Introduction

During the Covid19 crisis, outdoor sports experienced a significant boom, driven in part by shifting consumer preferences for open-air and socially distanced activities. Surfing in particular has become increasingly popular in recent years, with the number of surfers in France growing at a notable pace (Huijgen, 2021). The growing popularity of surfing received a significant boost when it was included in the 2020 Summer Olympics. which gave the sport greater visibility and recognition on the global stage. As a result, the surf industry holds a unique position in France's economy and culture, offering everything from surfboards and apparel to surf schools and renowned brands (Guyot, 2021).

In this vibrant and competitive market, building and maintaining a strong brand image is essential. Managing a brand's image effectively not only attracts new customers but also ensures loyalty from existing ones (Farquhar, 1989). This thesis sets out to explore the impact of brand image on customer loyalty in the French surf industry, shedding light on how specific elements of brand image can foster a strong connection between brands and their customers.

Surfing itself possesses a rich culture and deeply rooted values. More than just a booming industry (NDP Group, 2015), surfing impacts consumer behavior, influences the choice of tourist destinations, and highlights environmental issues affecting coastal regions (Congdon et al., 2002). Surfers, however, aren't just typical consumers. They are part of a passionate community deeply committed to environmental preservation and highly attentive to the ethical practices of the brands they support (Congdon et al., 2002). Consequently, the ability of surf brands to appeal to these values becomes critical in cultivating customer loyalty. Surfing is often deeply connected to ideas of freedom, adventure, nature, and authenticity (Delannoy, 2023), which highlights the critical importance of brand image in reflecting and communicating these emotional values.

France boasts a thriving surf industry that brings together a wide range of players, from small artisanal businesses to large international brands (NDP Group, 2015). Exploring how brand image influences customer loyalty in this niche market is essential, as it directly affects a company's profitability and long-term success. With the rise of trends like sustainability, technological innovation, and changing consumer preferences, analyzing the relationship between brand image and loyalty can provide valuable insights to help French surf companies adapt and thrive.

Accordingly, the primary aim of this thesis is to examine how brand image influences customer loyalty in the French surf industry. Brand image is viewed as a multifaceted concept that reflects how consumers perceive a company's products, values, culture, and history (Aaker, 1996). On the other hand, customer loyalty refers to the tendency of customers to keep choosing a company's products or services over time, even when faced with competing options in the market.

This central objective is addressed through the following three interrelated research questions:

RQ1: What specific brand image elements most influence customer loyalty in the French surf industry?

This question examines whether different consumer groups such as beginners, intermediate, and experienced surfers, react differently to various aspects of brand image, which could, in turn, impact their level of loyalty.

RQ2: How does brand image perception vary among different customer segments in France, and how does this affect their loyalty?

This question explores whether different consumer groups react differently to brand image elements, and how these perceptions influence their brand loyalty.

RQ3: What is the role of socio-cultural values in shaping brand image and their influence on customer loyalty in the surf industry?

This question investigates how societal and cultural values including sustainability, authenticity, and community contribute to the formation of brand image and impact loyalty in the context of heightened environmental and social awareness.

This research is deliberately limited to the French surfing market. While the findings could offer insights applicable to other markets, the primary emphasis remains on this unique context. The research focuses specifically on examining how brand image influences customer loyalty within this industry. It does not aim to tackle the broader range of marketing and management challenges that surf companies may encounter.

The structure adopted is as follows:

- Introduction sets out the objectives, the research questions, and the importance of examining brand image in a specialized market like the French surf industry.

- Chapter 1 (Literature review) provides a comprehensive overview of the relevant academic sources on brand image and customer loyalty, establishing the theoretical underpinnings for this study.
- Chapter 2 (Conceptual Model) presents the theoretical framework underlying this research. It identifies the main dimensions of brand image and explains how they relate to customer loyalty. This chapter proposes the model equation and provides a visual representation of the conceptual framework that will guide the empirical analysis.
- Chapter 3 (Methodology) details the research design, including data collection methods and analytical approaches, which will guide the empirical investigation.
- Chapter 4 (Results) outlines the findings from the quantitative study, interprets them within the context of existing theories, and highlights their practical implications for industry professionals.
- Chapter 5 (Conclusion) provides a summary of the main findings, discusses the theoretical and managerial contributions, and offers recommendations for future research directions.

By following this structure, the thesis aims to furnish a thorough investigation of how brand image contributes to customer loyalty in the French surf industry, offering evidence-based recommendations to surf companies, marketers, and other stakeholders seeking to strengthen their market position in an increasingly competitive environment.

The upcoming chapter presents a comprehensive review of existing academic work on brand image, customer loyalty, and the surf market. By examining the key concepts, models, and empirical findings relevant to these areas, this review will lay the groundwork for the subsequent methodological approach and empirical investigation.

1. Literature review

In today's highly competitive business environment, the relationship between brand image and customer loyalty has emerged as a critical concern for marketers and companies across various sectors. It has been proven on several occasions by theorists, notably Godey et al (2016), that a brand's image, which encompasses its reputation, identity and fundamental values, has a significant impact on consumer perceptions. It is an element that partly influences purchasing decisions and fosters long-term customer loyalty. This effect is even more pronounced in specialized and niche markets, where brands must forge deeper connections with a passionate and discerning consumer base to differentiate themselves effectively. In this regard, the surf industry presents a compelling setting for examining the interplay between brand image and customer loyalty, as it combines unique elements of lifestyle, cultural identity, and environmental awareness.

This literature review aims to explore the complex relationship between brand image and customer loyalty, with a particular focus on the surfing industry. Surfing, often associated with ideas of freedom, a connection with nature and a strong sense of community, represents a niche market. It is shaped by highly committed consumers who are invested in both the sport and its lifestyle (Guibert, 2011). Guibert (2011) points out that this unique consumer group offers a fascinating opportunity to explore how a carefully cultivated brand image can go beyond simply offering products to create lasting loyalty.

Brand image can be defined as the collection of beliefs and associations consumers have about a brand, influencing far more than just initial purchase decisions. Rather, it also drives continued patronage, word-of-mouth recommendations, and long-term advocacy (Elliott et al., 2015). In the surf sector, brand managers and brand strategists need to understand these dynamics in depth, recognizing that consumers are not just looking for functional benefits, but are attracted by a wider cultural story, shared values and a real sense of community (Guibert, 2011). Therefore, the impact of brand image on loyalty in this context is complex and goes beyond simple transactions to include emotional bonds, social identity and alignment with a desired lifestyle.

The aim of this review, therefore, is to critically analyze the key theoretical frameworks and empirical findings related to brand image and customer loyalty, and to contextualize these insights within the surf industry. By examining relevant theories, industry-specific characteristics, and effective branding practices, this analysis will illuminate the strategies surf brands can employ to cultivate a distinct brand identity and sustain loyal, committed consumer communities over time. This survey will provide a better understanding of how surf brands, which operate in a very narrow niche market, can leverage brand image to foster lasting loyalty and achieve sustainable growth.

1.1 The role of brand image

Unlike the visual or concrete elements of a trademark such as logo design or product features, brand image reflects the intangible but powerful cognitive and emotional bonds that consumers develop over time (Aaker, 2009; Keller, 1993). From a strategic perspective, the importance of brand image stems from its ability to differentiate a company's offerings in crowded and competitive markets. As product benefits can be relatively easily limited, building a consistent brand image allows companies to stand out from the crowd by developing a sustainable competitive advantage (Elliott et al., 2015). In this way, consumers move towards their purchasing preferences and build loyalty. By shaping how consumers perceive quality, value, and relevance, a strong brand image can reduce price sensitivity, foster emotional attachment, and encourage repeat purchases (Godey et al., 2016).

Within this context, brand image does not merely represent static visual or conceptual elements. Rather, it continuously evolves as consumers interact with the brand, reinterpret its meanings, and share their perceptions with others (Keller, 2003). The co-creation of brand image, facilitated through social media, brand communities, and influencer marketing, underscores the dynamic nature of brand perception. These processes allow brands to engage with consumers on a deeper level, promoting trust, identification, and cultural resonance (Godey et al., 2016; Iglesias et al., 2013).

In niche markets, where products and services often have a strong symbolic meaning, branding becomes even more essential. The surfing industry is a good example: here, brand image transcends functional attributes and blends with lifestyle narratives, community values and environmental awareness (Guibert, 2011). Surf brands often rely on images that extol freedom, authenticity, adventure and respect for nature, creating a distinct mental landscape that resonates with consumers who see surfing as more than a sport, an identity and a cultural ethos (Ponting & McDonald, 2013). By expressing these values through branding, surf companies can build meaningful relationships with consumers, encouraging them not only to buy products, but also to embrace the brand's worldview.

1.1.1 Key components of brand image

To better understand this concept, several theories have been developed to break down the components of brand image and study their influence on consumer loyalty. The three main theories examined in this section are those of David Aaker, Kevin Lane Keller and Susan Thompson and Rajeev Malaviya. These theories provide additional insights into specific elements of brand image.

1.1.1.1 Aaker’s brand equity model (2009)

David Aaker proposes a model that identifies several key dimensions of brand image, which collectively contribute to brand equity, i.e. the value that the brand generates for its consumers and its company. According to Aaker, brand image is made up of four main elements:

Brand awareness: This is the ability of a brand to be recognised and recalled by consumers. A brand with a solid reputation in the market is easily identified and, above all, arouses associations in the minds of consumers.

Brand associations: These are the meanings and values that consumers attribute to the brand. They include functional attributes, but also emotional and symbolic associations, such as a brand's quality, innovation or environmental commitment.

Perceived quality: This dimension refers to consumers' overall perception of the quality of the products or services offered by the brand. High perceived quality strengthens the brand's image and can have a positive effect on customer loyalty.

Brand personality: Aaker sees the brand as having a personality, similar to that of an individual. Brands can be perceived as young, dynamic, confident or traditional. This dimension affects consumers' emotional connection with the brand.

1.1.1.2 Keller's customer-based brand equity (CBBE) model (2003)

Kevin Lane Keller's Customer-Based Brand Equity (CBBE) model emphasizes the importance of consumer perception in building a strong brand image. This model is structured in four different stages, illustrated by a pyramid, where each stage is built based on the previous one. The main objective is to create a strong, positive relationship between the brand and its consumers, leading to lasting loyalty.

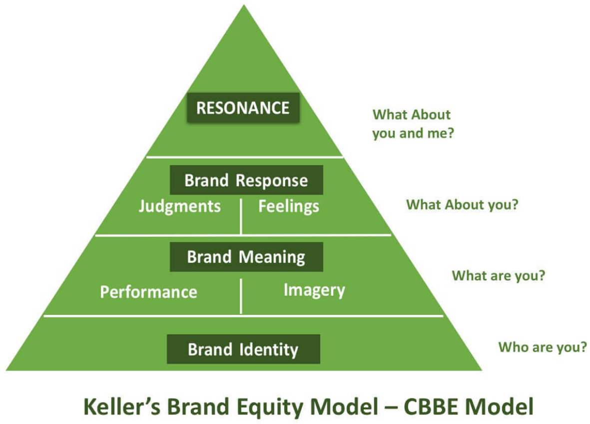

Figure 1: The Customer-Based Brand Equity (CBBE) Model (Keller, 2003)

Source: Adapted from Keller, K. L. (2003). Strategic Brand Management: Building, Measuring, and Managing Brand Equity. Pearson Education.

This model provides a structured framework for understanding how brand image is gradually transformed into loyalty through four successive stages. In the context of this research, the CBBE model allows us to conceptualize the cognitive and emotional pathway that links brand awareness, brand associations and perceived quality to the construction of a strong relationship with the brand. It thus supports the empirical approach of this study by illustrating how surf brands can strengthen loyalty not only through performance or visibility, but also through emotional attachment and identity alignment. The model thus serves as a theoretical basis for analyzing the data and understanding the loyalty mechanisms at work in niche industries such as surfing.

As shown above, the model consists of four stages which describe the process by which a brand builds strong brand equity. It all starts with brand awareness, which enables consumers to recognize and remember the brand, making it easier for them to make decisions. Once awareness has been established, consumers associate the brand with functional and emotional characteristics, influencing their perception of its quality and values. Then, through cognitive judgements and emotions, consumers evaluate the brand's performance and develop an emotional connection with it, reinforcing their commitment. Finally, the last stage, brand resonance, represents the total adherence of consumers, who not only become loyal to the brand, but fully embody it, making repeat purchases and recommending it to others.

Keller's model is therefore based on the idea that a strong brand is one that manages to make a lasting positive impression on consumers' minds and establish a relationship based on trust and emotional commitment.

1.1.1.3 Thompson and Malaviya's brand image and loyalty model (2013)

In their model, Thompson and Malaviya introduce a differentiated approach to brand image by highlighting the affective and cognitive dimensions of brand image. They explain that brand image directly influences consumer loyalty through two different aspects:

Brand emotions: Consumers develop emotional bonds with brands. They believe that this stronger bond is a factor that leads them to be more loyal. For example, brands that evoke feelings of pleasure, nostalgia or belonging to a group can consolidate the loyalty of customers who want to relive a particular moment or feeling.

Cognitive evaluations: As well as emotions, consumers also evaluate the brand more rationally, based on the quality, price and performance of the products or services. These cognitive evaluations affect their loyalty.

This model shows that the interaction between emotional and rational aspects creates a robust brand image that has a direct impact on loyalty.

1.1.1.4 Synthesis of brand image elements

Each model focuses on different aspects of brand image, but each theory also systematically identifies common factors on which the study will concentrate:

Brand awareness: The ability of the brand to be recognized and remembered by consumers is essential to brand image. It is often the first step towards building loyalty.

Brand associations: These associations, whether functional (quality, performance) or emotional (values, emotional ties), play a central role in the way consumers perceive the brand.

Brand personality and emotions: A brand's ability to evoke emotions or embody a personality that is attractive to consumers is a determining factor in loyalty.

Perceived quality: The perception of quality, whether objective or subjective, has a strong influence on consumers' decision to remain loyal to a brand.

1.1.2 The significance of brand image

Brand image plays an important role in the creation and formation of brand identity. It serves as a key reference point for consumers who want to meet their needs in a crowded marketplace (Keller, 1993). It also influences how a brand's offerings are perceived by consumers. As such, it has a direct impact on purchase intentions, willingness to pay a premium price and long-term loyalty (Aaker, 2009; Elliott et al., 2015).

One of the reasons why brand image is so important is its ability to distinguish a brand in markets where products often seem indistinguishable. In particular, it is the brand image that enables consumers to make decisions and choose one product or service over another. According to Keller (2003), when competitors offer similar quality and prices, the brand that is most closely aligned with consumers' values, aspirations and lifestyles gains the advantage. This is an element that comes on top of the functional advantages, by exploiting the emotional and symbolic aspects of consumption. For example, in niche markets such as the surf industry, a brand's image often embodies cultural significance, environmental responsibility and a sense of community - qualities that make the brand relevant far beyond individual transactions (Guibert, 2011; Ponting & McDonald, 2013).

At the same time, brand image contributes to the development and maintenance of brand equity. This is because by accumulating added value in consumer perceptions and in the experiences created with the brand, brand image feeds brand equity (Aaker, 2009; Keller, 2003). A positive brand image therefore improves perceived quality, fosters trust and arouses emotional attachment, which together increase consumer loyalty and reduce vulnerability to competitive threats (Chaudhuri and Holbrook, 2001). More importantly, Godey et al (2016) note that this protective barrier can be crucial in volatile markets, as a strong brand image can maintain consumer preferences even when faced with price promotions or product innovations from competing brands.

The role and usefulness of the brand image can also be seen in the orientation of marketing communications and strategic decision-making. By defining a clear and consistent brand image, companies can streamline their messages, target specific market segments more effectively and take advantage of cultural or social trends that correspond to their brand values (Kapferer, 2012). To explain further, brand image can be said to act as a compass, aligning product development, partnerships, sponsorships and promotional activities with a coherent narrative that builds consumer loyalty over time.

In general, the importance of brand image lies primarily in its ability to influence consumer perceptions, reinforce brand equity and cultivate deep-rooted loyalty. A recent analysis by Parris and Guzmán (2023) reminds us that the boundaries between brand image, loyalty and brand equity are increasingly blurred and interdependent. The authors stress that, to understand modern loyalty, it is essential to approach brand image as an evolving system of interactions, experiences and shared aspirations between the brand and its audiences.

By connecting with consumers emotionally, culturally and socially, branding transforms simple products into meaningful symbols, guiding consumer choices and fostering lasting relationships. The following sections will look in more detail at how brand image interacts with customer loyalty, particularly in specialist markets such as the surf industry, where authenticity, shared values and common identity are integral to brand success.

1.2 Customer loyalty in marketing

Customer loyalty is at the heart of marketing strategies, as it not only demonstrates a brand's ability to satisfy and retain its customers, but also represents a key competitive advantage in saturated markets (Oliver, 1999; Reichheld & Teal, 1996). Beyond repeat purchases, loyalty encompasses the emotional bonds, attitudinal preferences and behavioural tendencies that lead consumers to resist competitors' offers, forgive occasional service failures and remain attached to the brand over time (Chaudhuri & Holbrook, 2001). By encouraging loyalty, companies can reduce acquisition costs, improve customer lifetime value and stimulate positive word-of-mouth, all of which contribute to sustainable business growth (Kotler & Keller, 2012).

Marketing literature generally conceives of loyalty as a multi-faceted concept, made up of attitudinal and behavioural elements. According to Morgan and Hunt (1994) attitudinal loyalty refers to a customer's internal disposition towards a brand, including trust, commitment and emotional attachment, while behavioural loyalty manifests itself in consistent buying patterns and brand endorsement. This duality emphasizes that true loyalty is not limited to purchase frequency but is also based on positive attachment and identification with the brand's values and mission (Carroll & Ahuvia, 2006).

Cependant, la fidélité doit être appréhendée dans un cadre relationnel et culturel plus large, où les interactions vont bien au-delà des simples transactions commerciales. Dans cette perspective, le marketing relationnel souligne l'importance de la confiance, des valeurs partagées et des échanges continus pour construire et maintenir des relations durables avec les clients (Berry, 1983 ; Morgan & Hunt, 1994). Alors que les marchés sont de plus en plus fragmentés et que les choix des consommateurs se multiplient, les marques qui parviennent à cultiver la fidélité le font souvent en créant des liens significatifs et authentiques avec leur public. Cela implique non seulement de fournir des produits et des services de qualité supérieure, mais aussi de communiquer une histoire de marque convaincante et de s'engager auprès des clients par le biais d'expériences personnalisées et communautaires (Iglesias et al., 2013).

Customer loyalty also makes a decisive contribution to reinforcing the value of the brand and improving its positioning in relation to the competition (Aaker, 2009; Keller, 2003). Loyal customers are more likely to view the brand favourably, attribute higher quality and value to its offerings. Sometimes they may even unconsciously become ambassadors who influence the perceptions and behaviours of other consumers. In niche sectors such as the surf industry, it is even more important to nurture loyalty because in these closely linked markets, loyal customers not only generate revenue, but also contribute to the brand's cultural capital and authenticity. This enables companies to strengthen their image and their resistance to the incursions of the competition.

1.2.1 Defining customer loyalty and its theoretical foundations

Several theoretical frameworks and models have been developed to dissect the complexity of loyalty. Oliver's (1999) *Four-Phase Model of Loyalty* delineates a progression through cognitive, affective, conative, and action stages. Initially, customers form a cognitive loyalty based on rational judgments of product quality and value. As positive experiences accumulate, affective loyalty emerges, characterized by genuine sympathy and emotional attachment to the brand. Conative loyalty then reflects an intention or commitment to repurchase, which ultimately leads to action loyalty, an ingrained habit of choosing the brand despite situational influences or the marketing efforts of competitors. This model highlights that loyalty is a dynamic process that develops over time, as consumers strengthen their relationship with the brand. Recent research shows that consumer loyalty is increasingly influenced by changes in their values, their sensitivity to societal issues and their digital habits. This is particularly true of the younger generations (Lim et al., 2023). In this context, brands need to adapt their relationship strategy by focusing on authenticity, personalisation and consistency with cultural expectations.

Other conceptualisations emphasize the relational and value-based nature of loyalty. Reichheld and Teal's (1996) loyalty scale illustrates a journey from simple awareness to full brand advocacy, reinforcing the idea that trust and meaningful connections are essential. Berry's (1983) relationship marketing model and Morgan and Hunt's (1994) commitment and trust theory converge on the idea that loyalty results from ongoing, mutually beneficial exchanges based on trustworthiness, honesty and shared values. These approaches highlight the importance for customers of perceiving the brand as sincerely committed to their well-being and aligned with their personal ideals in order to foster lasting loyalty. A recent study by Salam et al (2024) shows that generation Z expects brands to be sincere, long-lasting and aligned with their personal values. This loyalty is no longer built solely on traditional transactional factors, but is based on the ability of brands to offer an authentic, ethical and socially responsible relationship.

Cognitive and affective theories further enrich our understanding of the foundations of loyalty. One example is the theory of expectations and disconfirmation (Oliver, 1980), which postulates that loyalty develops when a brand consistently meets and/or exceeds customer expectations. According to this theory, this is what leads to satisfaction and the reinforcement of repurchase intentions. Similarly, the theory of self-congruence (Sirgy, 1986) emphasizes the role of identity alignment, meaning that when consumers perceive a strong match between a brand's image and their idea of themselves, loyalty increases. In the surf market, these identity links are particularly important, as brands that authentically represent cultural values, community ethics and environmental stewardship can inspire deeper and more enduring forms of loyalty.

A final service quality framework also offers valuable insights: the SERVQUAL model (Parasuraman, Zeithaml and Berry, 1988). It explains that dimensions such as reliability, assurance, responsiveness, empathy and tangible cues influence perceptions of service excellence. This means that brands that excel in these areas not only satisfy customers, but also foster trust and emotional commitment. Over time, these positive associations strengthen both brand equity and loyalty, forming a virtuous cycle of value creation (Aaker, 2009; Keller, 2003).

Rather, it is the result of a harmonious combination of rational assessments, emotional connections and relational interactions. Brands that skilfully navigate these dimensions, delivering consistent quality, forging trusting relationships, aligning with consumers' identities and exceeding their expectations, are more likely to turn satisfied customers into loyal advocates. In highly specialised contexts such as the surf industry, the ability to build loyalty goes beyond transactional benefits to incorporate the lifestyle, values and cultural narratives that define the brand's place in the consumer's world.

1.2.2 Importance of customer loyalty

The importance of customer loyalty in marketing cannot be overstated, as it serves as both a strategic asset and a measurable indicator of brand strength. Loyal customers provide businesses with a range of tangible and intangible benefits that contribute to their long-term success. The main benefits are economic in the sense that loyal customers are less price sensitive, buy more frequently and require fewer marketing resources to retain, ultimately resulting in improved profitability and cost efficiency (Kotler and Keller, 2012; Reichheld and Teal, 1996).

In addition to the financial aspect, loyalty has a positive cascading effect on brand equity. By choosing the same brand over and over again, loyal customers effectively validate the brand's perceived quality, values and image in the marketplace, reinforcing its credibility and reputation (Aaker, 2009; Keller, 2003).

In addition, loyal customers are known to engage in positive word-of-mouth and actively promote the brand, extending its reach, attracting new customers and increasing the overall long-term value of each customer (Carroll and Ahuvia, 2006; Morgan and Hunt, 1994).

From a relational point of view, loyalty represents the culmination of trust, emotional attachment and the creation of mutual value (Berry, 1983; Chaudhuri and Holbrook, 2001). As a result, loyal consumers are often more tolerant of service failures, giving brands the opportunity to recover and strengthen relationships rather than turning to the competition (Homburg and Fürst, 2005). This reciprocal dynamic based on trust fosters stability and continuity, highly desirable attributes in today's rapidly evolving consumer systems.

In niche markets such as surfing, loyalty plays an even more pronounced role. Here, authenticity, cultural alignment and community engagement are paramount (Guibert, 2011; Ponting & McDonald, 2013). Brands that gain long-term commitment from their consumers also gain credibility within subcultures, reinforcing their position as authentic representatives of the lifestyle and values that define their niche. In these environments, loyal customers don't just buy products; they become co-creators of brand meaning, actively shaping brand narratives and participating in brand communities, ultimately maintaining the brand's cultural relevance and distinctiveness.

Building customer loyalty is a key element in shaping a solid brand and developing a sustainable strategy. It has a direct impact on business performance, reinforces the perceived value of the brand, creates more authentic links with customers and nurtures a sense of belonging to a community, offering a real advantage over the competition.

1.3 The surf industry: a unique niche market

The surf industry occupies a distinct niche within the global marketplace, shaped by a combination of sport, lifestyle, culture, and environmental consciousness. Unlike many consumer sectors that focus primarily on functionality or price, the surfing market is built on symbolic values, a shared ethos and strong community involvement. If you take the slightest interest, you'll realize that surfing is more than just a leisure or sporting activity. Surfing is often seen as a way of life, deeply linked to local traditions, coastal landscapes and associated sub-cultural communities. As a result, the brands operating in this space must navigate a landscape where authenticity, identity, and narrative resonance play critical roles in securing customer loyalty. As Lim et al (2023) point out, consumer behaviour has really evolved in recent years, driven in particular by digitalization, the rise of ethical concerns and a deep need for cultural identification. These behaviours are particularly visible in markets such as surfing, because they are very specific.

A defining characteristic of the surf industry is the cultural significance attributed to surfing and the strong emotional investment of its Respondents. Early cultural and tourism studies showed that surfers around the world share common values and behaviors, forming what Guibert (2011) calls a “transnational community”.

Within this community, factors like environmental stewardship, respect for oceanic ecosystems, and support for sustainable business practices often influence consumer decision-making. Thus, surf brands that align their offerings with these values may find it easier to differentiate themselves and foster a loyal following.

The niche nature of the industry is also reflected in its market structure. Many traditional surf brands started out as small, local companies and have since grown into major players with global recognition (Booth, 2001). Booth also explains that, despite the strong evolution of these companies, niche differentiation remains paramount. Indeed, consumers often attach as much importance to a brand's heritage and history as to the performance of its products. The resulting competitive environment emphasizes the cultivation of a brand image that conveys authenticity, craftsmanship and community involvement, dimensions that can be more difficult to replicate than product features or pricing strategies.

Then, the surfing sector's reliance on experiential consumption makes it a niche market in its own right. Surfing-related purchases are often linked to the search for meaningful experiences, whether that be travelling to famous surf spots or attending brand-sponsored surf events and festivals (Stranger, 2011). These experiences allow customers to engage with brands not only as suppliers of equipment, but also as curators of a lifestyle. By organising surf camps, promoting environmental campaigns or sponsoring professional surfers who embody specific cultural ideals, brands create touchpoints that strengthen emotional bonds and foster lasting consumer loyalty.

At a time when consumers have so much choice, the surf industry's niche positioning requires brands to do more than just meet functional needs. They need to match the identities, aspirations and values of their customers. Surf brands that achieve this transform ordinary transactions into acts of personal expression and community belonging. As we will see in the following sections, the interplay between brand image, cultural authenticity and community engagement within this niche market plays an essential role in building consumer loyalty and maintaining competitive advantage.

1.3.1 Brand image in the surf industry

In the surf industry, branding goes well beyond functional attributes and encompasses a constellation of cultural meanings, lifestyle associations and ethical values that resonate deeply within the surfing community. As we saw earlier, brand image is made up of the mental associations that consumers form when they think about a brand (Aaker, 2009; Keller, 1993, 2003). In the surfing sector, these associations often involve notions of authenticity, adventure, environmental responsibility and a sense of belonging to a global community of surfing enthusiasts (Guibert, 2011; Ponting & McDonald, 2013).

In the surf industry, branding goes well beyond functional attributes and encompasses a constellation of cultural meanings, lifestyle associations and ethical values that resonate deeply within the surfing community. As we saw earlier, brand image is made up of the mental associations that consumers form when they think about a brand (Aaker, 2009; Keller, 2003). In the surfing sector, these associations often involve notions of authenticity, adventure, environmental responsibility and a sense of belonging to a global community of surfing enthusiasts (Guibert, 2011; Ponting & McDonald, 2013). This complex form of branding is influenced by internal decisions and external cultural forces. Surf brands build their image through their products, which often focus on craftsmanship, sustainability and innovation. They also rely on storytelling, athlete endorsements and evocative visual campaigns to reflect the emotion of the surfing lifestyle (Stranger, 2011). At the same time, consumers play an active role in creating the brand's image. They share their experiences on social networks, take part in sponsored events and exchange sub-cultural knowledge in their communities. In this interactive process, the brand image is co-created. Companies and consumers work together to define what the brand embodies (Cova and Pace, 2006; Iglesias et al., 2013).

One of the defining characteristics of brand image in this niche market is its reliance on authenticity. In the surfing world, authenticity is highly valued, surfers often reject excessive greed and look for brands that appear sincere and true to the spirit of surfing (Eitzen and Zinn, 2001; Yarnal and Kerstetter, 2005). A brand that is perceived as being authentically linked to surfing culture, for example founded by surfers, supporting local surfing communities, or practising environmental stewardship and respecting ethical production standards, can thus enhance its credibility and strengthen emotional ties with consumers. On the other hand, brands perceived as exploitative or far removed from the ethics of surfing may find it difficult to build a favourable image or secure long-term loyalty.

Environmental commitment is another important dimension of brand image in the surfing industry. Since surfing is linked to the ocean and coastal environments, brands that communicate sustainable practices and support conservation initiatives can align themselves with the values of environmentally conscious surfers (Martin & Assenov, 2012; Wheaton, 2007). This perspective is in line with the conclusions of Agu et al (2024), who demonstrate empirically that the adoption of sustainable practices by companies significantly strengthens consumer loyalty. Indeed, brands perceived as socially and environmentally committed enjoy greater attachment, as they allow consumers to project their personal values into the act of buying. Such connections help to reinforce positive associations with brands, making consumers feel that their customers support not only their personal enjoyment, but also wider ecological goals.

Finally, branding in the surf industry also draws on community and cultural narratives. Surfing is often described as an “identity sport”, closely linked to lifestyle and social identity (Wheaton, 2013). Brands that successfully capture this essence, valuing freedom, camaraderie or the unique wave experience, can profoundly influence consumer perceptions and behaviours. Surf brands that incorporate these values into their image can create true brand communities. This identity dimension is in line with the work of Charinsarn et al (2023), who emphasise that loyalty in markets with a strong cultural component relies heavily on perceived social proximity. In the case of surf brands, this proximity translates into belonging to a community of values, recognition between peers, and the co-construction of meaning between the brand and its consumers.

These communities, where members interact online and offline, reinforce the shared meanings that solidify the brand's position in its niche market (Muniz and O'Guinn, 2001).

Surf brands must not only provide high quality products, but also reflect the cultural, environmental and lifestyle attributes that are important to their audience. By integrating authenticity, sustainability and community involvement into their brand image, companies can foster deeper emotional connections and ultimately build loyalty among surf consumers.

1.3.2 Customer loyalty in the surf industry

The evolution of customer loyalty in the surf industry is linked, among other things, to the emergence of new forms of digital interaction. With the rise of social networks and online communities, brands have found a new way to maintain customer loyalty. Influencers, professional surfers and public figures, for example, play an important role in this process, becoming authentic brand ambassadors who convey messages that are consistent with the values of sport. This enables brands to create deeper, more personal links with consumers. Today, brands that succeed in capitalising on digital engagement and building online communities around their image often enjoy a higher rate of loyalty (Schau et al., 2009).

There is also the notion of heritage and legacy, which plays a decisive role in consumer loyalty in the surf industry. Brands with a long history, a strong local presence or which are perceived as pioneers in the field often benefit from greater symbolic capital. This cultural heritage is valued by surfers, who see it as a form of legitimacy and a connection to the history of the sport. Traditional brands such as Quiksilver, Roxy or Rip Curl embody the stories of surfing pioneers and, as a result, are seen as symbols of authenticity in the sport. Consumers loyal to these brands see them not just as suppliers of products, but as representatives of surf culture itself.

Another important characteristic of loyalty in the surfing industry is group dynamics. Surfers, who are often influenced by strong social and community codes, favour brands that allow them to feel part of a community. The choice of a surf brand can therefore be motivated by social recognition and the desire to assert their belonging to a group. This form of social loyalty is reflected in the recommendation of brands to other surfers and word-of-mouth, which plays a key role in maintaining brand loyalty (Muniz & O'Guinn, 2001).

Finally, loyalty in surfing can also be linked to product performance. Although the cultural and emotional aspect is primordial, consumer loyalty remains dependent on the reliability and durability of surfing equipment. For example, surfboards and accessories that last over time and allow surfers to progress and improve their performance are factors that encourage loyalty.

1.4 Comparing surf industry with another niche market

While the surf industry's loyalty dynamics hinge on cultural authenticity, community engagement, and alignment with environmental values, examining other niche markets can reveal broader patterns and nuances. A case in point is the Portuguese vinho verde industry, analyzed by Brochado and Oliveira (2018), who explored how brand equity dimensions influence customer loyalty in a unique, geographically and culturally anchored market.

Brochado and Oliveira's (2018) study underscores that, similar to the surf industry, loyalty emerges as a central component of brand equity. In their research on vinho verde, an emblematic Portuguese wine often associated with tradition, terroir, and regional identity, brand loyalty was identified as the most influential dimension in shaping overall brand equity. Interestingly, this finding aligns with the surf industry context, where loyalty is also critical. Just as surfers favor brands that represent their lifestyle and communal values, wine consumers in this niche segment gravitate toward brands that resonate with their cultural and sensory preferences, promoting repeat patronage and advocacy.

Another parallel lies in the emphasis on brand associations and perceived quality. In the vinho verde market, strong brand associations and high-quality perceptions significantly contribute to brand equity, reinforcing loyalty (Brochado & Oliveira, 2018). Similarly, in the surf industry, authenticity, sustainable production practices, and alignment with subcultural values operate as key associations that enhance perceived quality and trust. Both contexts illustrate that when consumers perceive brands as delivering more than just products, whether through rich brand stories, ethical values, or adherence to cherished traditions, they are more inclined to remain loyal over time.

Notably, the vinho verde study found limited support for brand awareness as a significant driver of brand equity. This insight also resonates with what occurs in the surf industry: while awareness may help a brand enter a consumer's consideration set, awareness alone rarely guarantees loyalty or strong brand equity. Instead, loyalty and meaningful brand associations outweigh simple recognition in shaping enduring brand strength in both markets. This parallel suggests that in niche contexts, be it a culturally rooted wine region or a subculturally defined sport, depth of engagement and alignment with consumer values matter far more than broad awareness.

However, certain differences also emerge. The surf industry's loyalty often hinges on lifestyle identification and environmental consciousness, whereas the vinho verde market, while also influenced by cultural authenticity, may place relatively greater emphasis on sensory pleasure, origin, and product consistency. These distinctions highlight that while loyalty's foundational role remains consistent across niche markets, the specific drivers, such as environmentalism, heritage, or community rituals, vary according to the cultural and experiential dimensions at play.

Comparing loyalty in the surf industry with insights from the Portuguese vinho verde sector reveals both convergences and divergences. In both markets, loyalty stands at the heart of brand equity, surpassing brand awareness as a key determinant of long-term success. Associations, quality perceptions, and value alignment remain essential in forging lasting connections with consumers. Differences in underlying motivations and cultural cues underline the importance of context sensitivity: companies need to understand the unique values and experiences that shape loyalty in each niche market. This will enable them to develop more effective brand management strategies and ensure that authenticity resonates with target audiences.

2. Conceptual model

Within the framework of this study, a conceptual model has been created to link the different dimensions of brand image and their impact on consumer loyalty in the French surf industry. This model will consider both the fundamental elements of brand image (awareness, associations, perceived quality, brand personality, emotions) and the external variables, such as consumer segments and socio-cultural values, which influence the way in which brand image is perceived and, consequently, affect loyalty.

2.1 Key brand image elements

The model is based on the three main theories explored in the literature review (Aaker, Keller, Thompson & Malaviya), which identify key elements that shape brand image:

1. **Brand awareness (BW)**: The ability of a brand to be recognised and recalled by consumers, a fundamental factor in initiating loyalty.
2. **Brand associations (BA)**: The meanings attributed to the brand, whether functional (performance, quality) or emotional (values, culture).
3. **Perceived Quality (PQ)**: The perceived quality of the products and services associated with the brand, which influences loyalty through trust and satisfaction.
4. **Brand Personality (BP)**: The human traits that consumers associate with the brand, such as confidence, modernity or adventure, creating an emotional connection.
5. **Emotions (E)**: The emotional bonds created between the brand and consumers, particularly in a market like surfing where emotions and experience play a key role.

2.2 Consumer segments and socio-cultural values

Consumer segments and socio-cultural values also play a central role in this model:

- **Consumer segments (CS)**: Brand image perception can vary according to consumer groups (e.g. beginners vs. experienced surfers, young adults vs. older adults). These segments influence brand loyalty according to their specific preferences and needs.
- **Socio-cultural values (SV)**: Values related to authenticity, sustainability and ecological commitment are particularly influential in the surfing sector, where the

surfing community and culture have an impact on loyalty. Brands that align with these values are more likely to generate lasting loyalty.

2.3 Relationships between brand image and customer loyalty

In this conceptual model, customer loyalty (CL) is seen as the result of the interaction between brand image and consumer segments, while taking socio-cultural values into account:

- Brand awareness (BW), brand associations (BA), perceived quality (PQ), brand personality (BP), and emotions (E) all influence customer loyalty, to varying degrees.
- Consumer segments (CS) and socio-cultural values (SV) modify the way these elements are perceived and the impact they have on loyalty.

2.4 Proposed model equation

The model can be represented by the following equation, which formalises the impact of the different dimensions of brand image on customer loyalty:

$$CL= \beta1*BW + \beta2*BA + \beta3*PQ + \beta4*BP + \beta5*E + \beta6*CS + \beta7*SV + \varepsilon$$

In this equation:

- **CL** is consumer loyalty.
- **BW**, **BA**, **PQ**, **BP**, **E** are the variables representing the key elements of the brand image.
- **CS** represents the consumer segments.
- **SV** represents the socio-cultural values that influence brand perception.
- **β1**, **β2**, **β3**, **β4**, **β5**, **β6**, **β7** are the coefficients that measure the impact of each factor on loyalty.
- ε is the error term, representing the proportion of precision not explained by the variables included in the model

3.5 Visual representation of the conceptual Model

The conceptual model is summarized in the following diagram using boxes and arrows to show the relationships between the elements:

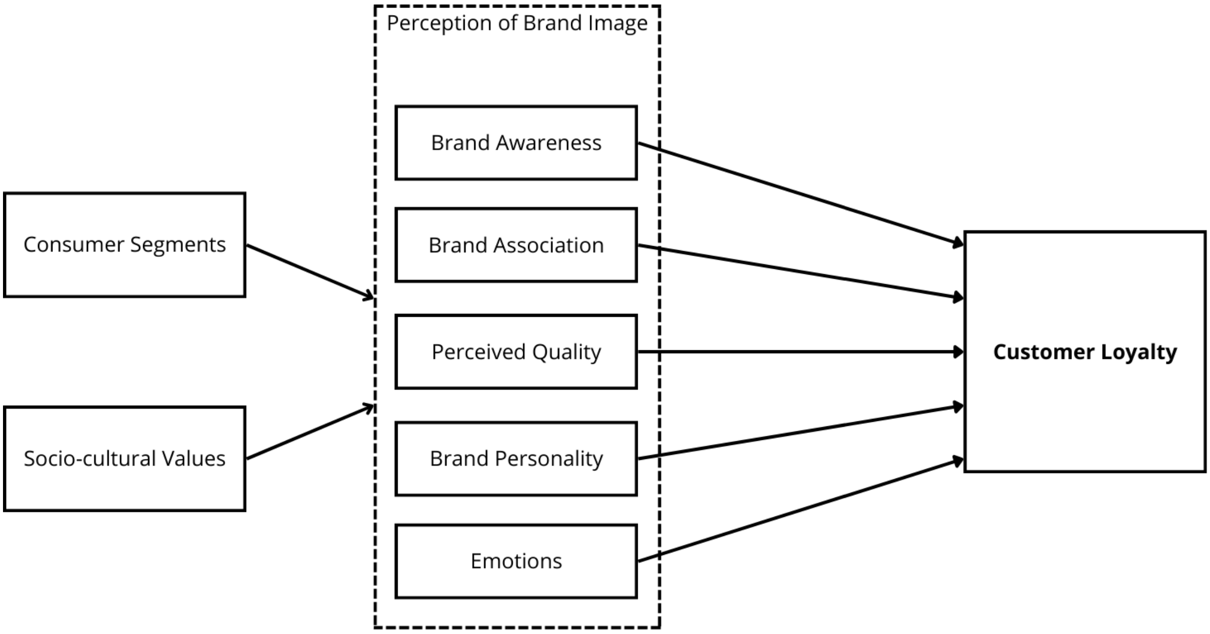

Figure 2: Conceptual Model

Source: Author's own elaboration based on Aaker (2009), Keller (2003), and Thompson & Malaviya (2013).

Having defined the conceptual model, it is now necessary to specify the methodology for testing the relationships between brand image elements and consumer loyalty.

3. Methodology

The methodology of this study will allow us to test the conceptual model proposed above and answer the research questions on the impact of brand image on consumer loyalty in the French surf industry. This section describes in detail the design stages of the study, the data collection methods, and the statistical analysis techniques that will be used to validate the relationships between the different elements of brand image and consumer loyalty.

3.1 Research design

The approach of this study is quantitative, as it aims to test hypotheses on the impact of different dimensions of brand image on consumer loyalty. Using standardised data collection instruments, we will seek to obtain results that can be generalised to the surf industry in France. This approach will make it possible to measure the effect of each component of brand image (awareness, associations, perceived quality, brand personality, emotions) and external variables (consumer segments and socio-cultural values) on customer loyalty.

To construct a relevant and representative questionnaire on the surf industry in France, it is essential to understand which surf brands are currently the most popular with French consumers. This is why Google Trends analysis is used in this study. Using this tool, we will be able to identify the most searched surf brands over the last five years in France, allowing us to focus our questionnaire on the most relevant and popular brands in the current market context. This analysis provides an empirical and dynamic perspective on consumer preferences, strengthening the validity of our survey by ensuring that the brands included in the study truly reflect those that are most present and influential in the minds of consumers. In this way, the use of Google Trends allows us to better target the questionnaire questions, ensuring that the brands selected for evaluation are aligned with actual consumer perceptions, and not just based on theoretical assumptions.

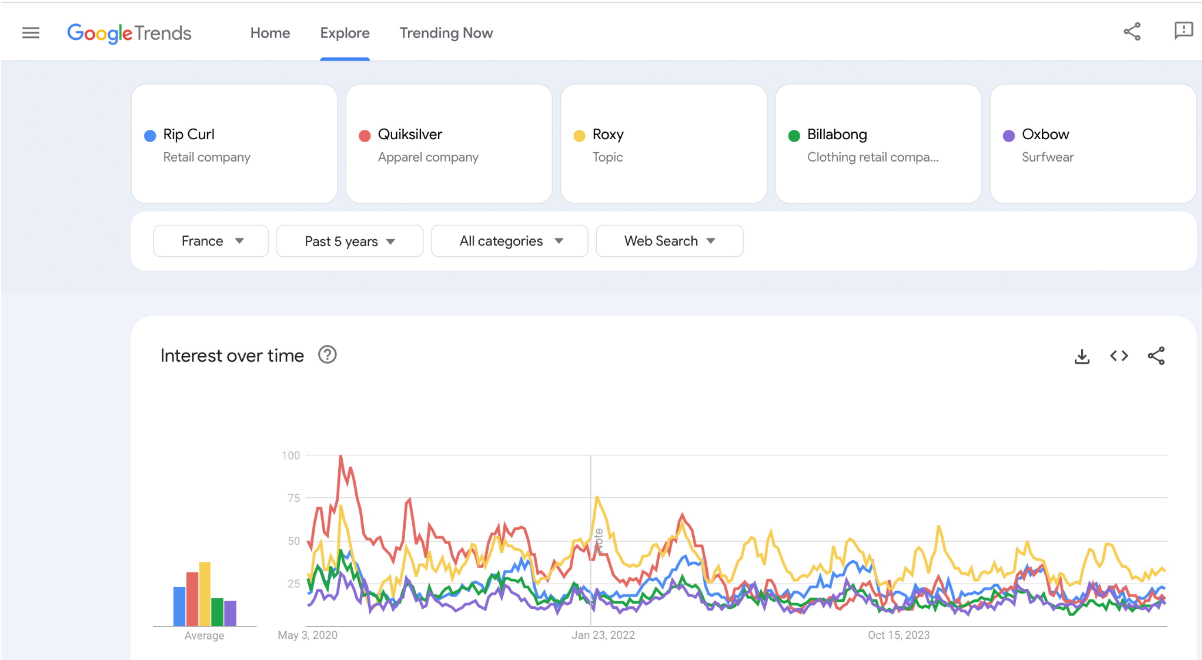

Figure 3: Google Trends Analysis about Surf brands

Source: Google Trends data.

A comparative analysis was carried out via Google Trends, covering the last five years (2020-2025), to assess the relative interest in several surf brands in France. The results (see chart above) show that Quiksilver and Roxy come out on top, followed by Rip Curl and Billabong, well ahead of brands such as Oxbow, which is French. These figures reflect a greater familiarity and visibility with French consumers.

The use of these four brands in the questionnaire ensures that the majority of Respondents can formulate informed opinions, an essential condition for evaluating the dimensions of recognition, perceived quality, environmental commitment or loyalty. In addition, these brands embody the balance between the historical heritage of surfwear, the diversity of segments (men, women) and the international and lifestyle dimension of the sector.

3.2 Sample selection

The target sample for this study is French consumers of surf-related products. Whether they are regular or occasional surfers, or simply consumers of surfwear. This choice is justified by the desire to analyse the influence of brand image beyond the sport, by integrating the lifestyle dimension that is so present in this industry.

The sample is made up of several complementary segments:

- Surfers (variable frequency: occasional, regular, frequent)
- Non-practisers, attracted by the aesthetics or values of surf culture
- All generations X, Y (millennials) and Z, the main targets of surfwear brands.
- Consumers who may or may not be aware of the ecological and social values promoted by these brands.

The sample was drawn up using a convenience sampling method, by distributing the questionnaire online via social networks through Instagram, surfing forums, specialist Facebook groups and university platforms. This method of distribution makes it possible to reach both communities involved in surfing and urban surfwear consumers who do not actually surf.

A sample size of at least 200 Respondents is envisaged to ensure statistical representativeness and enable robust analysis of the results.

The inclusion criteria are as follows:

- Speak French (questionnaire distributed in French only as it is aimed at the French market). This gives us a larger number of Respondents and a better understanding of the questions, which means less bias and more consistency in the responses.
- Be at least 18 years old.
- Be familiar with at least one of the four proposed brands (Quiksilver, Roxy, Rip Curl, Billabong) in order to answer the targeted questions. People who don't know any of these brands will automatically be directed to the following questions.
- Have bought or considered buying a surfing product in the last 24 months (clothing, equipment, accessories).

3.3 Data collection

The data used in this study consists mainly of original responses collected via a self-administered online survey. This primary data was collected directly by the author and specifically designed to meet the research objectives. To complement the analysis, secondary sources, including previous academic research and information on the surfing industry, were also mobilised to strengthen the theoretical framework.

The survey will include closed questions and Likert scales to measure consumers' perceptions of the different dimensions of brand image and their loyalty to surf brands. The survey will be structured into several sections, each corresponding to the elements of the conceptual model:

- Brand image measurement: Respondents will be asked to rate the awareness, associations, perceived quality, personality and emotions associated with several well-known surf brands. The scales will be adapted from the work of Aaker (2009), Keller (1993) and Thompson and Malaviya (2013).
- Measurement of consumer loyalty: loyalty will be measured both attitudinally (emotional attachment to the brand) and behaviourally (intention to repurchase, recommendation of the brand).
- Measurement of consumer segments and socio-cultural values: questions will be asked to assess Respondents' level of ecological commitment and cultural values, in order to analyze their influence on brand image perception.

To link the empirical results to the research objectives, each question in the questionnaire was associated with one of the three main research questions (RQ1, RQ2, RQ3). The table below summarizes this correspondence, indicating the question numbers concerned for each line of analysis:

Table 1: Correspondence between research questions and survey items

Research purpose	Related question(s)
Identification / Profile	Q5
RQ1	Q6,Q7
RQ2	Q1, Q2, Q3, Q9, Q10
RQ3	Q4, Q8

Source: primary data collected using the Qualtrics questionnaire.

The data will be collected via an online survey platform (*Qualtrics*), which makes it easy to target a large sample of surfers and avoid having one person complete the questionnaire several times. The survey will be pre-tested on a small sample before its full release to check the clarity of the questions and the validity of the scales. Respondents remain anonymous, and each participant may take part only once. Each respondent who does not answer the whole questionnaire will not be counted in the analysis of the results to ensure the reliability of the answers.

3.4 Data analysis

Once the data had been collected, descriptive statistical analyses were carried out in order to draw up a socio-demographic profile of the Respondents and to characterize their relationship with the surfing world. These initial analyses focused on variables such as generation, frequency of surfing, level of experience, degree of ecological commitment and familiarity with certain brands.

The study was then based on segmented analyses, carried out using cross-filters in Qualtrics, to identify variations in brand image perception (Q6) and brand loyalty (Q7), according to different respondent profiles. Several segmentation criteria were defined, including:

- the level of ecological commitment (committed Respondents vs. not very committed),
- frequency of purchase of surf-related products,
- as well as priority purchasing criteria (e.g. design, quality, ecological values), derived from a ranking question.

These filters made it possible to highlight differentiated trends between the groups, by comparing the averages obtained on the different Likert scales.

Before proceeding with the multiple linear regression analysis, a reliability test was carried out to assess the internal consistency of the different scales used in the questionnaire. To do this, Cronbach's alpha was calculated for each of the five dimensions of the model.

The results are as follows:

Brand awareness: $\alpha = 0.691$

Brand associations: $\alpha = 0.692$

Brand personality: $\alpha = 0.740$

Emotions: $\alpha = 0.773$

Brand loyalty: $\alpha = 0.816$

These values indicate acceptable to good reliability, in line with methodological standards in social sciences (Nunnally, 1978). They confirm that the constructs used in this study demonstrate consistent internal coherence, and justify their inclusion in more advanced statistical analyses such as regression.

In addition to descriptive and segmented analyses, a multiple linear regression model was conducted to examine the combined influence of brand image dimensions on customer loyalty (see Appendix D). This allows a more robust statistical validation of the relationships proposed in the conceptual model.

Finally, these cross-analyses helped to answer the three research questions, by providing a segmented reading of the perceptions and behaviors declared by consumers in the surf sector in France.

3.5 Limitations and potential biases

Although this study sheds relevant light on the link between brand image and loyalty in the French surf industry, several limitations need to be taken into account.

Firstly, the method of recruiting Respondents, based on convenience sampling via online channels (social networks, forums, Facebook groups), may introduce a selection bias. It is possible that the sample is not fully representative of all surfwear consumers in France, particularly with regard to older age groups or non-connected audiences.

Secondly, the data is based solely on the responses declared by the Respondents themselves, which may lead to certain biases. For example, some Respondents may have wanted to project a positive image of themselves, by exaggerating their commitment to the environment or their loyalty to a brand.

In addition, the analysis is based on comparisons of averages between segmented groups, which makes it possible to highlight relevant trends in relation to the exploratory objectives of the study. Although more advanced statistical methods were not used here, they could provide a useful extension for future, more in-depth research.

Despite these limitations, the results highlight significant trends and offer concrete avenues for understanding the drivers of loyalty in a niche market with a strong cultural dimension and identity, such as surfing.

4. Results

After presenting the theoretical framework and the methodology adopted, this section presents the empirical results from the quantitative survey of 268 Respondents. Some of them did not complete the entire questionnaire (64 Respondents). To avoid any potential bias, they will therefore be removed from the responses analysed. This leaves an analysis of the responses from a pool of 204 Respondents.

The aim here is to assess the extent to which the different dimensions of brand image influence consumer loyalty in the French surf industry. The results are analysed in the light of the three research questions, highlighting the specific characteristics of the customer segments and the role of socio-cultural values in shaping loyalty. The aim of this analysis is to draw out concrete lessons for brands operating in this niche market.

4.1 Profile of Respondents and general characteristics of the sample

The final sample consisted of 204 valid Respondents, drawn from convenience sampling carried out online via social networks, specialist forums and university platforms. This method made it possible to reach both communities involved in surfing and urban consumers attracted by the surfwear aesthetic.

The younger generations are strongly represented: Gen Z (1997-2012) makes up 59% of the sample, followed by Millennials or generation Y (1981-1996) at 26%, then generation X (1965-1980) at 15%. This distribution reflects the traditional core target of surf brands, which are primarily aimed at young adults and teenagers, who are strongly represented in this sample. This generational structure, combined with the significant presence of non-practisers, underlines the dual strategic scope of surf brands: to reach both a public immersed in surfing and a public seduced by the aesthetics and values conveyed by the surfwear culture.

As far as surfing is concerned, 33% of Respondents said they did not surf, 15% surfed occasionally, 21% surfed regularly (1 to 3 times a month) and 32% surfed frequently (at least once a week). This balanced distribution between active surfers and non-surfers makes it possible to examine the differences in perception between users and simple consumers of surf culture.

Of the 139 Respondents, 39% said they were beginners (less than a year's experience), 32% intermediate (1 to 5 years) and 29% experienced (more than 5 years). These groups will shed different light on the relationship between experience and brand perception.

On the question of ecological commitment to surf brands (scale of 1 to 5), the results are moderately dispersed: 13% do not feel committed, 29% not very committed, 25% moderately committed, 25% fairly committed and 7% very committed. We can see that the trend is towards moderate commitment, with the central response categories being scores 2, 3 and 4, which together account for almost 80% of responses. This reflects a measured but significant commitment, typical of a public that is sensitive but not yet militant.

In terms of brand awareness, Quiksilver came top (37%), followed by Rip Curl (34%), Billabong (16%) and Roxy (13%). Only one respondent said he knew none of these brands, confirming the relevance of the choice of brands proposed in the questionnaire. Each participant was asked to rate a brand they knew, which then became their reference for all the questions relating to perceived image, loyalty and alignment with values. This personalised choice forms the basis for the data analysis in the following sections.

These socio-demographic and behavioural characteristics will serve as a basis for analysing, in the following sections, the differences in perception of brand image and loyalty according to profile (RQ2), as well as the impact of socio-cultural values on these perceptions and behaviours (RQ3).

4.2 Assessing perceived brand image

Respondents rated the brand with which they felt most familiar (Quiksilver, Rip Curl, Billabong or Roxy), using a Likert scale from 1 (strongly disagree) to 5 (strongly agree). The evaluation was based on several dimensions derived from the Aaker, Keller and Thompson & Malaviya models: brand awareness, perceived quality, ecological commitment, authenticity, performance and emotions.

4.2.1 Overall results

Overall, the brand image is positively perceived, particularly in terms of recognition, authenticity, and emotional resonance. Details by consumer segment are discussed in the following sections.

Perceived product quality scored an intermediate average (3.81), reflecting a generally favorable, but less assertive, assessment. Conversely, capacity for innovation was the weakest point (3.40), suggesting a perceived lack of renewal or insufficient communication about technical and creative advances.

Concerning the environmental commitment, it received an even lower score (3.32), reflecting a mixed perception of the social and ecological actions taken by brands. Yet this dimension is particularly important in a world historically associated with nature, where ethical expectations are high.

On the other hand, authenticity, a fundamental element in the surfing imagination, was rated very highly (4.17), underlining the ability of brands to embody the codes and values perceived as authentic by consumers.

On a functional level, the performance (3.84) and durability (3.73) of products are perceived positively, reflecting a moderate but constant level of technical satisfaction, particularly among surfers.

Finally, the emotional dimensions show a real attachment: the brands arouse positive emotions (4.05) and a feeling of pride (3.96). These results reinforce the idea that certain surf brands succeed in creating a strong identity and emotional bond with their public, over and above simple product performance.

These findings provide direct answers to RQ1, by identifying the dimensions of brand image that have the greatest influence on potential loyalty: brand awareness, authenticity and positive emotions appear to be the main levers. Conversely, innovation and environmental commitment are areas for improvement to strengthen long-term appeal.

4.2.2 Differences in perception between surfers and non-surfers

A segmented analysis according to surfing activity reveals significant differences in the perception of brand image. Surfers give systematically higher scores than non-surfers on several key dimensions, whether functional (performance, durability) or identity-related (authenticity, pride, anchoring in the market).

Table 2: Perceived brand image dimensions by surfers and non-surfers

	Average score (Likert Scale 1-5)		
Brand image dimensions	All respondents	Non surfers	Surfers
The brand is easy to recognise among other surf brands	4,25	4,00	4,36
The brand occupies a solid position in the surfing market	4,33	4,05	4,46
The brand is associated with high-quality products	3,81	4,05	3,91
The brand is seen as an innovator in the surf industry	3,40	3,17	3,51
The brand supports environmental and ecological initiatives	3,32	3,17	3,39
The brand is perceived as authentic and true to the spirit of surfing	4,17	3,86	4,31
The products meet my expectations in terms of performance	3,84	3,31	4,09
The products are durable and resistant	3,73	3,58	3,80
The brand arouses positive emotions in me	4,05	3,94	4,11
I'm proud to own products from this brand	3,96	3,82	4,02
Total Average	3,89	3,70	4,00

Source: primary data collected using the Qualtrics questionnaire (n = 204, Likert scale, 1–5)

The most significant differences appeared in perceived product performance, with surfers rating it at 4.09 compared to 3.31 among non-surfers, and in brand authenticity, which scored 4.31 for surfers versus 3.86 for non-surfers. These gaps suggest that direct use of the products and deeper immersion in surf culture enhance the perceived credibility of brands, both in terms of technical reliability and symbolic authenticity.

Differences, albeit more moderate, were also observed on emotional dimensions, such as pride of ownership or positive emotions aroused by the brand. This stronger emotional attachment on the part of practitioners can be interpreted as a form of identity appropriation, in a cultural universe where the brand is perceived as a marker of belonging.

Non-practitioners, on the other hand, although generally positive in their assessments, are less positive in their perceptions, particularly in terms of innovation, performance and ecological commitment. Their views seem to be guided more by external or aesthetic criteria, and less by real-life or community experience.

These results clearly support RQ2, showing that the perception of the brand image varies significantly according to the relationship with the practice. Practitioners develop a richer and more rewarding relationship with the brand, which potentially strengthens their loyalty. To reach non-practitioners, brands will have to work harder on the inspirational dimension, visible innovation and ethical commitments.

4.2.3 Differences in perception according to level of experience

An analysis of brand image perceptions according to the level of surfing experience reveals a clear progression: the greater the experience, the more positive the overall perception of the brand.

Table 3: Perceived brand image dimensions according to surfing experience level

	Average score (Likert Scale 1-5)		
Brand image dimensions	Beginners	Intermediates	Advanced
The brand is easy to recognise among other surf brands	4,13	4,38	4,67
The brand occupies a solid position in the surfing market	4,28	4,44	4,72
The brand is associated with high-quality products	3,89	3,89	3,95
The brand is seen as an innovator in the surf industry	3,54	3,40	3,59
The brand supports environmental and ecological initiatives	3,54	3,18	3,44
The brand is perceived as authentic and true to the spirit of surfing	4,31	4,27	4,36
The products meet my expectations in terms of performance	3,89	4,09	4,38
The products are durable and resistant	3,76	3,96	3,67
The brand arouses positive emotions in me	4,22	3,98	4,10
I'm proud to own products from this brand	4,09	3,80	4,18
Total Average	3,97	3,94	4,11

Source: *primary data collected using the Qualtrics questionnaire* (n = 139, Likert scale, 1–5)

Experienced surfers (with more than five years of experience) reported the highest scores on several strategic dimensions, such as brand recognition (scoring 4.67 on average), product performance (4.38), and pride of ownership (4.18). Their evaluations appear to be grounded in substantial experience with the brand, which reinforces both its functional legitimacy and symbolic identity.

In contrast, beginners tend to be more sensitive to emotional dimensions, indicating that their relationship with the brand is still forming and largely based on perception rather than direct use.

Intermediate surfers adopt a more balanced perspective. While their assessments are generally moderate, they display higher expectations regarding ecological commitment. This is reflected in a notably lower score of 3.18 for that dimension, suggesting a more critical awareness, likely developed through experience, of the environmental and ethical values communicated by brands.

These findings support RQ2 by demonstrating that brand image perception is influenced by the duration of a consumer's engagement with surfing. Experience appears to intensify trust in product quality, attachment to brand identity, and emotional resonance. Therefore, surf brands should adapt their image strategies to align with the maturity of their audience: emphasizing tangible experience for seasoned surfers, emotional narrative for beginners, and ethical credibility for intermediates.

4.2.4 Generational differences in brand image perception

Analysis of perceptions by generation reveals marked variations in the way surf companies' brand image is perceived, particularly in terms of meaning, social commitment and innovation.

Table 4: Generational differences in brand image perception

	Average score (Likert Scale 1-5)		
Brand image dimensions	Gen Z	Millenials	Gen X
The brand is easy to recognise among other surf brands	4,20	4,41	4,14
The brand occupies a solid position in the surfing market	4,28	4,54	4,10
The brand is associated with high-quality products	3,91	3,69	3,66
The brand is seen as an innovator in the surf industry	3,49	3,28	3,24
The brand supports environmental and ecological initiatives	3,54	3,02	2,97
The brand is perceived as authentic and true to the spirit of surfing	4,22	4,11	4,07
The products meet my expectations in terms of performance	3,88	3,91	3,59
The products are durable and resistant	3,79	3,67	3,59
The brand arouses positive emotions in me	4,10	4,04	3,90
I'm proud to own products from this brand	3,88	4,07	4,07
Total Average	3,93	3,87	3,73

Source: primary data collected using the Qualtrics questionnaire (n= 204, Likert scale, 1–5).

Gen Z, aged between 18 and 28, is well represented in the sample and tends to rate most brand aspects quite positively. Their evaluations are particularly favorable when it comes to ecological commitment (3.54), innovation (3.49) and especially authenticity, which reaches a score of 4.22. This suggests that Gen Z consumers have high expectations regarding ethical and cultural alignment. They appear especially drawn to brands that reflect their values and communicate with purpose and responsibility. These empirical results corroborate the work of Salam et al (2024), who emphasise that the loyalty of Generation Z consumers depends heavily on the match between personal values and the ethical and social commitments displayed by the brand.

Millennials (Gen Y) stand out for their very positive perception of brand awareness: 4.41 for recognition and 4.54 for market position, the highest scores among the three groups. On the other hand, their critical view of ecological commitment (3.02) and innovation (3.28) suggests a form of disenchantment or increased demands on brand promises, perhaps linked to greater exposure to digital marketing.

Generation X, by contrast, tends to give the lowest ratings on most dimensions. Scores for innovation, ecological commitment, product performance and durability all fall below those of younger generations. Nevertheless, they still express a solid appreciation for authenticity and a sense of pride in owning the brand's products, both rated at 4.07. This could indicate a form of emotional loyalty rooted in long-term familiarity with established surf brands rather than a response to recent changes in positioning or values.

These results fully illustrate RQ2, by showing that expectations of surf brands vary considerably between generations. Gen Z values commitment and authenticity; Millennials recognize the strength of brands while remaining critical; Gen X shows a more conservative form of loyalty. To optimize their image and win the loyalty of these audiences, brands need to personalize their message, by reinforcing the alignment with generational values.

4.2.5 Statistical influence of brand image dimensions on loyalty

In order to complete the descriptive analysis of the dimensions influencing loyalty, a multiple linear regression was carried out to empirically test the simultaneous impact of the five brand image dimensions on declared loyalty. This approach enables the trends observed previously to be validated statistically.

The final sample included 203 valid Respondents. The steps involved in processing the data, constructing the variables, and verifying the statistical hypotheses (normality of residuals, independence of errors, absence of multicollinearity, homoscedasticity) are detailed in Appendix D.

The overall model is significant ($R^2 = 0.412$; $F = 27.63$; $p < 0.001$), indicating that 41.2% of the variance in loyalty can be explained by the brand image dimensions tested. Three of them stand out as having a significant direct effect:

- Emotions ($\beta = 0.589$; $p < 0.001$): This is the most decisive variable. This result confirms that loyalty is largely derived from a brand's ability to generate positive affective reactions such as pride, attachment or emotional satisfaction. This is in line with the findings of Thompson & Malaviya (2013) on the central role of affect in brand-consumer relationships.
- Brand Awareness ($\beta = 0.246$; $p = 0.004$): Brand awareness contributes significantly to loyalty. A brand that is visible, recognised and well established in the surfing world has a competitive advantage, notably because it is more easily accessible cognitively at the time of purchase (Keller, 2003).
- Perceived Quality ($\beta = 0.234$; $p = 0.014$): The perception of high performance and good durability of products also influences loyalty, reinforcing the link between concrete experience and long-term commitment.

Conversely, Brand Association ($\beta = 0.009$; $p = 0.937$) and Brand Personality ($\beta = 0.109$; $p = 0.227$) show no significant direct effect in this model. These results suggest that the symbolic or identity elements of the brand are not sufficient on their own to generate behavioural loyalty, without an emotional or experiential impact.

The estimated model equation, including the calculated coefficients, is as follows:

$$Y = (-1{,}40) + 0{,}25\,X1 + 0{,}01\,X2 + 0{,}23\,X3 + 0{,}11\,X4 + 0{,}59\,X5 + \varepsilon$$

This equation underlines the importance of emotional engagement and perceived value in building loyalty, over and above declarative or symbolic attributes. They call on surf brands to focus their efforts on creating strong, consistent emotional experiences, as well as guaranteeing impeccable product quality and constant visibility.

4.3 Brand loyalty

After analyzing the perception of brand image, this section focuses on Respondents declared loyalty to their reference brand. Three main dimensions are studied: the intention to repurchase, their propensity to recommend the brand and their attachment to the competition.

4.3.1 Overall results

The results indicate an overall moderate level of loyalty, with notable differences between the behavioral and affective dimensions. In other words, Respondents may feel emotionally attached to the brand but not yet translate this attachment into strong actions.

Respondents express moderate brand loyalty, with repurchase intent slightly higher than advocacy or resistance to competitors. These findings reinforce the need for brands to create emotional and value-based engagement.

The propensity to recommend the brand to friends and family is slightly lower (average of 3.38), suggesting a form of loyalty that is more personal than genuinely socially committed. Few consumers take the step of actively recommending a brand, even though this is often seen as a strong indicator of emotional attachment.

Finally, resistance to competition, which was measured by support for the idea of remaining loyal to the brand even in the presence of an equivalent offer, obtained the lowest score (average of 3.16). This result highlights a certain vulnerability in the face of competition, in a market where products are largely perceived as substitutable and where differentiating advantages sometimes remain weak.

Loyalty is still a work in progress. It remains unstable, strongly influenced by the ability of brands to nurture an image that is perceived as unique and consistent. This is in line with the conceptual model developed in this study: to strengthen loyalty, brands must first and foremost activate the emotional and cultural levers of their image (RQ1).

4.3.2 Differences of loyalty according to surfers and non-surfers

Comparative analysis of the data reveals a significant difference in brand loyalty between practitioners and non-practitioners. Across all three dimensions assessed, brand loyalty is significantly higher among practitioners.

Table 5: Differences in brand loyalty between surfers and non-surfers

	Average score (Likert Scale 1-5)	
Brand loytalty dimensions	Non surfers	Surfers
I am loyal to the brand and will continue to buy its products in the future.	3,18	3,81
I often recommend the brand to friends and family	2,86	3,62
Even if another brand offers similar products, I will continue to buy this brand.	2,80	3,33
Total Average	2,95	3,59

Source: primary data collected using the Qualtrics questionnaire (n= 204, Likert scale, 1–5).

Re-purchase intention reached an average of 3.81 among surfers, compared with 3.18 among non-practitioners. The propensity to recommend the brand was also higher among surfers (3.62 vs. 2.86), indicating a higher level of emotional and social commitment.

Finally, resistance to competition, which was measured by the willingness to remain loyal to the brand despite similar alternatives, was also higher among practising consumers (3.33 vs. 2.80), although it remained the most vulnerable dimension in both groups.

These differences suggest that surfing plays a central role in building brand loyalty. The direct use of products seems to reinforce functional satisfaction, but also identification with the brand universe, two key factors in loyalty according to the models of Keller (2003) and Thompson & Malaviya (2013).

These results confirm the importance of the segmenting variable of practice in the analysis of brand loyalty (RQ2). Experiential proximity to the brand helps to nurture both functional trust (performance, durability) and symbolic attachment (authenticity, pride). It is therefore in the interests of brands to develop content, sponsorship and community strategies that are specifically targeted at sports enthusiasts, in order to strengthen their roots.

4.3.3 Differences in loyalty according to level of surfer

An analysis of the results according to level of experience shows that loyalty tends to increase with the length of time a customer has been in the sport, although the differences observed are more moderate than in other segments.

Table 6: Differences in brand loyalty according to surfing experience level

	Average score (Likert Scale 1-5)		
Brand image dimensions	Beginners	Intermediates	Advanced
I am loyal to the brand and will continue to buy its products in the future.	3,74	3,87	3,85
I often recommend the brand to friends and family	3,48	3,58	3,87
Even if another brand offers similar products, I will continue to buy this brand.	3,24	3,38	3,38
Total Average	3,49	3,61	3,70

Source: primary data collected using the Qualtrics questionnaire (n= 139, Likert scale, 1–5).

Experienced surfers, those with more than five years of practice, recorded the highest scores on two out of the three loyalty dimensions. Brand recommendation, in particular, reached 3.87 in this group, compared to 3.48 among beginners. This difference points to a stronger and more active form of loyalty, likely driven by a greater willingness to promote the brand to others, often a sign of deeper identification and long-term commitment.

When it comes to the intention to repurchase, it remains relatively consistent across intermediate (3.87) and experienced (3.85) profiles. While the differences are minor, they may suggest a progressive reinforcement of brand trust with accumulated experience.

Both are slightly higher than the score observed among beginners, which stood at 3.74. This progression suggests that trust in the brand tends to increase with experience, as familiarity and personal use reinforce satisfaction and attachment over time.

On the other hand, resistance to competition remains relatively low for all the groups, with scores close together (between 3.24 and 3.38), even among the most experienced. This underlines the fact that, despite an established bond of trust, loyalty remains conditional, particularly in a market where there are many alternatives and choice criteria can vary.

These results support RQ2 by showing that experience plays a role in strengthening loyalty, particularly in terms of relationships and prescriptions. However, it does not guarantee unconditional loyalty, especially if the brand does not continue to innovate or differentiate itself. For surf brands, this underlines the importance of maintaining a constant commitment to experienced surfers through quality, but also through community or environmental initiatives that strengthen the link beyond the product.

4.3.4 Differences in loyalty between generations

An analysis of loyalty behavior by generation reveals clear differences, in terms of intention to buy again recommendation and competitive loyalty.

Table 7: Differences in brand loyalty between generations

	Average score (Likert Scale 1-5)		
Brand image dimensions	Gen Z	Millenials	Gen X
I am loyal to the brand and will continue to buy its products in the future.	3,48	3,96	3,48
I often recommend the brand to friends and family	3,36	3,48	3,28
Even if another brand offers similar products, I will continue to buy this brand.	3,04	3,54	2,93
Total Average	3,29	3,66	3,23

Source: primary data collected using the Qualtrics questionnaire (n= 204, Likert scale, 1–5).

Millennials, born between 1981 and 1996, emerge as the most loyal group in the sample. They have the highest average scores for all three indicators, slightly ahead of the other groups. This suggests a slightly stronger and more stable brand loyalty within this segment. This consistent performance suggests a well-established relationship of trust, probably underpinned by both accumulated experience and a strong sense of brand awareness, as already highlighted in their perception of image (see section 5.2.4).

By contrast, Gen Z, despite being the most represented group in the sample, shows a more moderate and less stable form of loyalty. Their score for repurchase intention remains respectable at 3.48, but their resistance to competition drops significantly, averaging just 3.04. This suggests a higher degree of volatility, possibly influenced by their immersion in fast-moving, highly competitive digital environments. While this group values brand ethics and authenticity, their behaviors do not yet reflect a deeply rooted sense of loyalty.

Generation X, born between 1965 and 1980, appears to be the most cautious segment. Their results are slightly below those of Gen Z in terms of recommendation (3.28), and notably lower in terms of loyalty to the brand when faced with competition, where the average drops to 2.93. This could reflect a more demanding approach to brand relationships based on past experience, or perhaps a gradual distancing from an industry that no longer fully resonates with their current values or priorities.

These generational contrasts support RQ2 by showing how brand loyalty is shaped by age and consumer dynamics. Millennials represent a valuable target, combining trust, advocacy and brand resilience. Gen Z, although deeply concerned with values and meaning, requires stronger differentiation and emotional engagement to remain loyal. Generation X calls for a more expert, personalized approach that acknowledges their experience and evolving expectations.

4.4 Socio-cultural values and links with consumption

Four statements were submitted to the Respondents in order to evaluate their sensitivity to aspects such as the environmental impact, the social commitment of the brands, the influence of the surfing lifestyle, and the alignment with their own values. Responses were collected on a Likert scale from 1 (strongly disagree) to 5 (strongly agree), confirming their structuring role in the perception of surf brands.

4.4.1 Overall analysis

The statement “I am concerned about the environmental impact of surfing products” received the highest score in this section, with an average of 4.32. This reflects a strong level of ecological awareness among Respondents and indicates that they expect surf brands to adopt meaningful and transparent sustainable practices.

Similarly, the statement “Surf brands should support social and environmental causes” was rated highly, with an average of 3.94. This suggests that consumers expect brands to demonstrate a sense of social responsibility that goes beyond product quality or aesthetics. Performance and style alone are not enough; Respondents also value brands that take a clear and active stance on broader civic and environmental issues.

The cultural and identity dimension is also very present. The statement ‘Surfing culture and lifestyle influence the brands I choose’ obtained an average score of 3.87, indicating that surfing is perceived as a universe of reference guiding preferences beyond utilitarian criteria. This result confirms the importance of lifestyle symbolism in surfwear consumption, for both surfers and non-surfers.

Finally, the high average of 4.11 for the statement ‘It is important to me that the brand I support is in line with my ecological and social values’ demonstrates a search for personal consistency in brand choices. This demand for compatibility between personal values and the brand's perceived values is a key factor in differentiation and attachment.

These results provide a clear response to RQ3, by showing that consumers in the surf sector expect brands to be culturally, ecologically and socially consistent. These values are not peripheral, but central to building loyalty. To strengthen their appeal, brands must therefore ensure that these dimensions are reflected in their image, their discourse and their practices.

4.4.2 Socio-cultural values by generation

Analysis of the responses reveals marked generational differences in the importance attached to socio-cultural dimensions, particularly ecology, social commitment and surfing identity.

Table 8: Socio-cultural values by generation

	Average score (Likert Scale 1-5)		
Brand image dimensions	Gen Z	Millenials	Gen X
I'm concerned about the environmental impact of surfing products	3,83	3,24	3,62
Surf brands should support social and environmental causes	4,63	3,76	4,07
Surf culture and lifestyle influence the brands I choose	3,86	4,11	3,97
It is important that the brand I support is in line with my ecological and social values.	4,10	3,43	3,72
Total Average	4,11	3,64	3,85

Source: primary data collected using the Qualtrics questionnaire (n= 204, Likert scale, 1–5).

Gen Z emerges as the most ethically engaged group. They assign the highest importance to the belief that surf brands should support social and environmental causes, with an average score of 4.63. They also strongly value the alignment between a brand's values and their own, rating this criterion at 4.10. These results suggest that Gen Z expects brands not only to deliver on style or performance but also to demonstrate a clear and meaningful societal commitment. This expectation aligns with broader consumer trends observed in other sectors (Nielsen, 2019).

Millennials, by comparison, show a more moderate sensitivity to these issues. They assign lower scores to both environmental impact (3.24) and value alignment (3.43), indicating a less systematic demand for ethical consistency. However, they place the greatest importance on the cultural dimension of surfing, which they rate at 4.11. This suggests that their connection to surf brands is shaped more by lifestyle, identity, and aesthetics than by environmental or social considerations. For this generation, cultural authenticity seems to take precedence over civic engagement.

Generation X presents a more balanced and pragmatic perspective. While they do express interest in social responsibility (scoring 4.07) and environmental concerns (3.62), they appear somewhat less concerned about whether a brand's values fully align with their own, giving this aspect a score of 3.72. This may reflect a more practical or experience-driven mindset, or perhaps a degree of scepticism toward brand communication, particularly in relation to corporate social responsibility and greenwashing.

These differences confirm RQ3 by illustrating how socio-cultural values, whether environmental, social or identity-based, influence expectations differently depending on the generation. Surf brands will need to adapt their narratives and commitments to suit these profiles: offering a discourse of strong, authentic values for Gen Z, banking on cultural and aesthetic belonging for Millennials, and adopting a credible, transparent approach for the more mature Gen X consumers.

4.4.3 Adherence to socio-cultural values according to surfing activity

Analysis of the data reveals that surfers have a higher level of adherence to the socio-cultural values associated with surf brands than non-surfers, on all the dimensions measured.

Table 9: Adherence to socio-cultural values according to surfing activity

	Average score (Likert Scale 1-5)	
Brand image dimensions	Non surfers	Surfers
I'm concerned about the environmental impact of surfing products	3,78	3,37
Surf brands should support social and environmental causes	4,36	4,22
Surf culture and lifestyle influence the brands I choose	4,12	3,55
It is important that the brand I support is in line with my ecological and social values.	3,91	3,77
Total Average	4,04	3,73

Source: primary data collected using the Qualtrics questionnaire (n= 204, Likert scale, 1–5).

The most marked difference concerns the statement ‘Surfing culture influences the brands I choose’, with an average of 4.12 for surfers compared to 3.55 for non-surfers. This result can be explained by surfers' more direct cultural immersion in the world of surfing, giving them greater sensitivity to its identity, codes and representations. It also confirms the role of cultural identification in the processes of brand choice and loyalty, as highlighted by the work of Wheaton (2013) and Borne (2018).

The differences are less pronounced but consistent on the other statements relating to ecological commitment, support for social causes, and alignment with personal values. Surfers systematically obtain higher scores, which suggests that they establish a more direct link between their surfing and the social and environmental issues associated with this activity (protection of the oceans, sustainability of equipment, etc.).

Non-practisers, although slightly behind, are not indifferent to these values. Their scores exceed 3.5 on all dimensions, indicating a latent sensitivity to the world of surfing, motivated more by imagination and lifestyle aspirations than by actual practice.

These results confirm RQ3: surfing reinforces adherence to the cultural and ethical values that shape brand perceptions. It acts as a mediator between individual experience and the perceived credibility of brand engagement. To effectively engage surfers, brands need to authentically embody the values of surfing. To reach non-practisers, they will need to activate these same values in a more symbolic way, by focusing on lifestyle aspirations.

4.4.4 Adherence to socio-cultural values by level of ecological commitment

In order to gain a better understanding of the impact of environmental commitment on the perception of brand values, Respondents were segmented into two distinct groups: those with a low level of environmental commitment (scoring 1 or 2 on the commitment question), and those with a high level of commitment (scoring 4 or 5).

This segmentation was used to analyse the responses to question 8, on the importance attached to ecological, social and cultural values in the choice of brands. This approach aims to shed light on the role played by personal convictions in building brand loyalty and image (RQ3).

Table 10: Adherence to socio-cultural values according to level of CSR commitment

	Average score (Likert Scale 1-5)	
Brand image dimensions	Low commitment	High commitment
I'm concerned about the environmental impact of surfing products	3,03	4,41
Surf brands should support social and environmental causes	3,98	4,71
Surf culture and lifestyle influence the brands I choose	3,63	4,23
It is important that the brand I support is in line with my ecological and social values.	3,42	4,39
Total Average	3,52	4,44

Source: primary data collected using the Qualtrics questionnaire (n= 204, Likert scale, 1–5).

The results show clear and systematic differences between the two groups. On all items, highly engaged Respondents give significantly higher scores, confirming that the importance attached to brand values is directly correlated with the intensity of individual engagement.

Highly engaged consumers expect brands to embody a strong consistency with their personal convictions: sustainability, social responsibility, cultural alignment. Conversely, Respondents with a low level of commitment remain moderately sensitive to these aspects: values are perceived as secondary, without constituting major differentiation criteria in their choice of brand.

A particularly telling example concerns the cultural dimension: the statement ‘Surfing culture influences the brands I choose’ received an average score of 4.23 among the committed Respondents, compared with 3.63 among the less committed. This suggests that ecological commitment is often embedded in a broader vision of surfing as a world of meaning, going beyond simple purchasing behavior.

These results fully support RQ3, showing that ecological values are not just an accessory criterion, but a structuring vector in the relationship with the brand. For committed consumers, loyalty depends on ethical and cultural identification. Brands must therefore ensure that these commitments are visible, credible and deeply rooted in their identity in order to retain trust and strengthen attachment.

4.5 Purchasing behavior and choice criteria

This section examines the frequency with which surfing-related products are purchased, as well as the determining factors in the decision-making process. These elements shed light on the link between consumption behavior, brand perception and commitment to brand values, providing a complementary reading of the dimensions previously analyzed.

4.5.1 Overall results

The frequency with which surf-related products are purchased varies considerably within the sample, revealing a diversity of consumer profiles. The majority of Respondents (36%) say they make between 1 and 5 purchases a year, indicating moderate but regular consumption. Almost 29% buy less than once a year, illustrating more occasional or opportunistic behavior. Conversely, 35% of the panel are more frequent consumers: 18% buy between 6 and 10 times a year, and 17% more than 10 times, reflecting a strong commitment or affinity with the world of surfing, whether for functional (equipment) or cultural (lifestyle) reasons.

This data shows that, while surfwear attracts a wide audience, a significant proportion of consumers have an intensive or loyal relationship with the brand, making it a strategic lever for companies in the sector.

At the same time, Respondents ranked five purchasing criteria in order of importance. This ranking shows that product quality is the most decisive factor, frequently appearing in first place. Price came second, confirming that the economic dimension remains important, although it is relegated to second place behind qualitative considerations, which is typical in sectors where perceived performance is valued.

Ecological and social values come third, confirming a growing awareness of brand ethics. Although this criterion is not a priority for everyone, it is a significant differentiator, especially for the most committed segments (as observed in 5.4.4).

Design and conception are in fourth place: well taken into account but subordinate to functional or symbolic dimensions. Finally, social recommendations (from friends or the surfing community) appear to be the least influential criterion in the decision-making process.

These results suggest that surf brands need to focus above all on perceived quality, while incorporating clear and visible commitments to societal values in order to appeal to consumers who are sensitive to these dimensions. Brand awareness through social or community prescription, often valued in niche sports, seems here to be relegated to a secondary role, reinforcing the idea that the relationship with the brand is based above all on the product experience and projected values, rather than on social validation.

4.5.2 Perception of brand image by frequency of purchase

As observed in previous segmentations, frequent buyers tend to express a more favorable brand image, reinforcing the role of repeated interaction in shaping both functional and emotional perceptions.

Table 11: Perception of brand image by frequency of purchase

Brand image dimensions	Average score (Likert Scale 1-5) Occasional buyers	Regular buyers
The brand is easy to recognise among other surf brands	4,17	4,40
The brand occupies a solid position in the surfing market	4,24	4,49
The brand is associated with high-quality products	3,77	3,89
The brand is seen as an innovator in the surf industry	3,29	3,61
The brand supports environmental and ecological initiatives	3,20	3,54
The brand is perceived as authentic and true to the spirit of surfing	4,00	4,49
The products meet my expectations in terms of performance	3,62	4,27
The products are durable and resistant	3,68	3,83
The brand arouses positive emotions in me	3,95	4,24
I'm proud to own products from this brand	3,77	4,31
Total Average	3,77	4,11

Source: primary data collected using the Qualtrics questionnaire (n= 204, Likert scale, 1–5).

Regular buyers give higher average scores on all dimensions, particularly on key elements such as brand authenticity, product performance and market recognition. These results suggest that familiarity resulting from repeated contact with the brand reinforces positive perceptions of its functional and symbolic attributes.

Positive differences are also observed, to a lesser extent, on emotional dimensions (positive emotions, pride in owning the products), as well as on ethical and environmental aspects. This indicates that the act of repeated purchase is accompanied by a gradual consolidation of attachment to the brand, not only on rational grounds, but also in terms of identity and ethics.

This trend towards systematically higher scores among frequent consumers makes it possible to establish a clear distinction between committed consumers and occasional buyers in terms of their perception of the overall image.

These results confirm the strategic importance of recurrent consumption experience in building a valued brand image. They also reinforce the conceptual model proposed, in which the intensity of the relationship (measured here by frequency of purchase) helps to solidify the perception of image elements, a prerequisite for lasting loyalty.

4.5.3 Brand loyalty based on frequency of purchase

The table below summarizes the differences in loyalty observed according to frequency of purchase, serving as a basis for the analysis that follows.

Table 12: Brand loyalty based on frequency of purchase

	Average score (Likert Scale 1-5)	
Brand loytalty dimensions	Occasional buyers	Regular buyers
I am loyal to the brand and will continue to buy its products in the future.	3,33	4,14
I often recommend the brand to friends and family	3,13	3,86
Even if another brand offers similar products, I will continue to buy this brand.	2,92	3,60
Total Average	3,13	3,87

Source: primary data collected using the Qualtrics questionnaire (n= 204, Likert scale, 1–5).

Analysis of the data shows a clear correlation between frequency of purchase and declared level of loyalty. On the three dimensions measured - repurchase intention, brand recommendation, and continued purchase despite a competing offer - regular buyers systematically obtain higher scores than occasional buyers.

This difference is particularly marked for repurchase intention, a sign of greater behavioral commitment among consumers with repeated interaction with the brand. Similarly, their propensity to recommend the brand is higher, reflecting a more developed form of emotional and social support.

Even on the most demanding dimension: loyalty to similar products offered by competitors, regular buyers are more inclined to remain loyal. This indicates that repeat purchases consolidate resistance to the appeal of competing brands, fostering deeper attachment and greater trust.

These results confirm the idea that frequency of purchase plays a structuring role in building loyalty. It acts both as a consequence of an enhanced brand image (cf. 5.5.2), and as a factor amplifying the emotional and behavioural bond with the brand. For surf brands, building loyalty among regular buyers by cultivating an experience that is coherent, differentiating and aligned with their values is therefore a key retention lever.

4.6 Purchase criteria

Following on from previous analyses, the study of purchase criteria provides a better understanding of which concrete or symbolic elements are considered decisive by consumers when choosing a surf brand. This makes it possible to identify in more detail the dimensions of brand image that have the greatest influence on loyalty (RQ1), while assessing the real weight of socio-cultural values in purchasing behaviour (RQ3).

4.6.1 Global overview of purchase criteria

An analysis of the average rankings for the five purchasing criteria reveals a clear hierarchy in the priorities of consumers of surf-related products.

Table 13: Global overview of purchase criteria

Buying Criteria	Average ranking from 1 to 5
Quality	1,84
Price	2,5
The brand's ecological and social values	3,69
Recommendations from friends and the surfing community	3,97
Conception and design	3

Source: primary data collected using the Qualtrics questionnaire (n= 204, ranking from 1 to 5).

At the top of the list is quality, with an average of 1.84, confirming its status as the main criterion in the purchase decision. This result is consistent with the positive evaluations expressed earlier regarding product performance and durability (see section 5.2), and shows that consumer expectations are based above all on reliability and functional satisfaction.

Price, with an average of 2.50, is in second place: it retains a central role but remains subordinate to quality. This suggests a reasoned stance in which consumers are prepared to invest more, provided that the perceived value is justified.

Design and product conception rank third in importance, with an average score of 3.00. This suggests that while respondents show a certain interest in aesthetics and originality, these aspects do not outweigh more functional considerations. It reinforces the idea that, although closely linked to a lifestyle, the surfing world is primarily evaluated through concrete, performance-related criteria.

Ecological and social values, with an average rating of 3.69, and social recommendations, rated at 3.97, were placed lower in the overall hierarchy of purchase priorities. Although not dismissed, these ideological and community-based criteria seem to play a more supportive role. They influence purchasing decisions indirectly, adding value to the brand image, but rarely serve as the primary drivers of choice.

These results confirm that, for consumers of surfwear and related products, functional expectations dominate. However, societal and community criteria remain a background influence, particularly for the most committed segments (cf. 5.4.4). Brands will therefore have to combine product excellence and ethical commitment, without sacrificing one for the other, in order to respond to the different strata of motivation.

4.6.2 Buying criteria by consumer profiles

The analysis of purchase criteria by consumer segment provides a deeper understanding of the elements of brand image that influence loyalty behavior (RQ1), while revealing significant variations between groups (RQ2) and the differentiated role of socio-cultural values in the purchasing process (RQ3).

Table 14: Buying criteria by consumer profiles

	Average ranking from 1 to 5					
Buying Criteria	Surfers	Non surfers	Gen Z	Gen X	High CSR Commitment	Low CSR Commitment
Quality	1,73	2,06	1,77	2,07	1,63	1,98
Price	2,63	2,22	2,54	2,1	2,94	2,36
The brand's ecological and social values	3,19	2,62	3,13	2,77	2,78	4,33
Recommendations from friends and the surfing community	3,6	3,86	3,65	3,6	3,46	2,53
Conception and design	3,84	4,25	3,91	4,47	4,19	3,8

Source: primary data collected using the Qualtrics questionnaire (n= 204, ranking from 1 to 5)

Overall, quality is seen as the most important factor when purchasing surf-related products, although its perceived importance varies across consumer profiles. It emerges as a top priority for surfers (1.73), Generation Z (1.77), and especially for highly committed consumers (1.63). While these scores are close, they consistently point to the importance of quality among audiences most engaged with surfing or its values.This suggests that for individuals who are closely connected to surfing or its underlying values, product quality plays a key role in shaping trust and brand differentiation. In contrast, quality receives slightly lower priority among non-surfers and members of Generation X, who assign it scores of 2.06 and 2.07 respectively, reflecting a greater emphasis on other factors, particularly price.

Price is generally ranked second across most consumer groups, but it holds greater weight among non-surfers, those with a lower level of environmental concern, and Generation X, whose average ratings are 2.22, 2.36 and 2.10 respectively. In comparison, socially committed Respondents rate price lower, at 2.94, indicating a stronger willingness to pay more for brands that align with their values. This willingness may reflect a preference for sustainable or ethically responsible brands, supporting premium or differentiated positioning.

Ecological and social values are clearly more important to highly committed individuals, who assign this criterion an average ranking of 2.78, compared to 4.33 among the less committed. This contrast confirms that these values serve as a key point of differentiation for only a portion of the market. Surfers also give slightly more importance to this criterion than non-surfers, with scores of 3.19 and 2.62 respectively, suggesting that cultural proximity to surfing fosters a stronger expectation of brand responsibility.

Design holds greater significance among non-surfers and Respondents with low environmental commitment, who assign it average rankings of 2.62 and 2.53. This implies a consumption pattern more focused on appearance than substance. On the other hand, highly committed individuals rank design lower, at 3.46, suggesting that symbolic or ethical alignment outweighs aesthetic considerations for this group.

Finally, social recommendations consistently appear at the bottom of the ranking across all segments. Generation X, in particular, assigns the lowest relevance to this factor with a score of 4.47, followed by non-practitioners at 3.86. These results confirm that loyalty in the surfwear market is shaped more by individual experience and perceived brand values than by external influence from peers or community networks.

4.7 Analysis conclusion

The results of the quantitative study carried out on 204 Respondents provide clear answers to the three research questions formulated in relation to the central issue: how does brand image influence consumer loyalty in the French surf industry?

This analysis confirms that emotions, brand awareness, and perceived product quality are the main brand image drivers of consumer loyalty in the French surf industry (RQ1).

Conversely, innovation and environmental commitments, although valued by certain segments, appear to be levers that are still under-exploited or insufficiently perceived. These results are reinforced by the multiple linear regression analysis, which confirms that positive emotions, brand awareness and perceived quality are the three dimensions with a significant effect on brand loyalty. This statistical validation provides additional support for the interpretation of the empirical results.

The perception of brand image varies significantly between consumer segments (RQ2). Surfers, experienced surfers, Millennials and regular buyers express a stronger relationship with the brand, reflected in higher scores for image and loyalty. These results confirm that concrete exposure to the world of surfing (through practice or frequent consumption) strengthens attachment to the brand, particularly through cultural appropriation, product experience and social recognition.

Finally, the results highlight the central role of socio-cultural values in the relationship with the brand (RQ3). The most ecologically committed consumers and the younger generations (particularly Gen Z) attach greater importance to the alignment between the brand's values and their personal convictions. This perceived coherence is a decisive factor in building loyalty, well beyond simple product characteristics.

On a theoretical level, these results validate the models of Aaker, Keller and Thompson & Malaviya, showing that loyalty results from a balance between cognitive (quality, performance), affective (emotions, pride) and cultural (values, identification) dimensions. From a managerial point of view, the study highlights the need for surf brands to adapt their strategy to the diversity of profiles, emphasising, depending on the segment, performance, authenticity, emotional experience or ethical commitments.

5. Conclusion and recommendations

This dissertation set out to analyze the way in which brand image influences consumer loyalty in the specific context of the surfing industry in France. Through a quantitative study of 204 respondents, this research provided concrete answers to three main questions relating to the constituent elements of brand image, differences in perception between consumer segments, and the influence of socio-cultural values on purchasing and loyalty behaviour.

The findings highlight that emotions, brand recognition, and perceived product quality are the strongest contributors to customer loyalty in the French surf industry.

On the other hand, certain dimensions such as innovation or environmental commitment, although appreciated, do not yet seem to be sufficiently differentiating in terms of overall perception, except for well-defined segments. These findings confirm the importance of a strong functional and emotional foundation for building real loyalty, going beyond the effects of fashion or aesthetics.

The analysis also revealed marked differences according to consumer profile. Regular surfers, experienced surfers, Millennials and frequent buyers show higher levels of loyalty, fuelled by direct experience with products and deeper immersion in surf culture. Their perception of the image is also more positive, reflecting growing familiarity, cultural appropriation and confidence. Conversely, non-practisers, older generations and less committed consumers show a more fragile loyalty, more subject to rational or aesthetic trade-offs. These results underline the importance of taking account of usage, generation and commitment in brand management.

Based on the empirical results of this research, a number of concrete recommendations are formulated for surf brands wishing to strengthen customer loyalty on the French market. These recommendations are based directly on the three research questions (RQ1, RQ2, RQ3) as well as on the most significant dimensions identified by the multiple linear regression.

- Invest in emotional branding

Surf brands need to emphasize emotional engagement in their communications.This can be achieved through:

- Disseminating authentic stories (storytelling) highlighting the experiences of surfers or members of the community.

- Encouraging user-generated content (UGC) on social networks, particularly among Generation Z. The creation of symbolic collections (e.g. 'Première Vague', 'Héritage Surf') to inspire pride and nostalgia.

These levers strengthen the emotional bond with the brand and encourage lasting attachment.

- Maintaining a high profile and visibility

Being present in consumers' minds is a key competitive advantage. To achieve this, brands can:

  - Actively participate in surfing events or sponsor local competitions.
  - Partner with credible athletes or influencers in the surf and eco sphere.
  - Harmonize their visual identity across all channels (website, social networks, points of sale).

A brand that is easily recognizable increases purchase intentions and loyalty.

- Promoting product quality

Quality is the number one purchasing criterion declared by respondents. Brands must :

  - Design durable, high-performance products and communicate this explicitly.
  - Affix test labels or validations by professional surfers.
  - Promote customer reviews and detailed feedback.

Confidence in quality builds long-term loyalty.

- Tailoring communication to consumer segments

Brands need to tailor their message to each profile. For Generation Z, it is essential to emphasize ecological commitment and transparency. Millennials are more sensitive to the community aspect and the cultural heritage of surfing. Generation X expects performance and sustainability. Non practisers are looking for an aspirational lifestyle and aesthetic. Finally, experienced surfers value authenticity, technicality and a link with surf culture. A differentiated strategy helps to reinforce relevance and loyalty within each segment.

- Integrating strong socio-cultural values

Values are a strategic lever, particularly for committed consumers. Brands must:

  - Be involved in concrete environmental causes (beach clean-ups, recycled products, etc.).
  - Be transparent about their production chain and their social commitments.
  - Work with local artists or communities to anchor their cultural identity.

Younger generations expect brands to position themselves sincerely, in line with their convictions.

The above recommendations can be summarized in the following table, which cross-references the strategic levers, priority actions and target segments:

Table 15: Recommended marketing actions by consumer profile

Strategic lever	Key action	Target segment
Emotions	UGC campaigns, emotional storytelling	Gen Z, Millennials
Brand Awareness	Event sponsorships, influencer partnerships	General public
Quality	Product testing, material durability	Surfers, Gen X
Segmented messages	Tailored content based on surfing experience	All consumer segments
Value Alignment	Sustainability actions, local partnerships	Eco-conscious consumers

Source: Author's own elaboration based on the quantitative survey results (n = 204)

The study confirmed the fundamental role of socio-cultural values in brand relationships. For younger generations and ecologically committed consumers, consistency between personal values and those embodied by the brand is an essential condition for attachment and loyalty.

The world of surfing, with its collective imagination of nature, freedom and community, acts as a powerful interpretive filter in the way consumers evaluate and select brands. Loyalty, in this context, is not based solely on the product or the price, but on a genuine cultural and ideological commitment.

The findings of this study support and contextualize the theoretical models proposed by Aaker, Keller, and Thompson & Malaviya, highlighting their relevance in a niche market such as the surf industry. It highlights the interdependence between the cognitive, affective and cultural dimensions of brand image, and confirms that loyalty cannot be fully understood without integrating the logics of identification, shared values and the co-construction of meaning. It also provides a detailed reading of the generational, practical and societal dynamics at work in purchasing decisions and recommendation behavior.

Nevertheless, this study has certain limitations. The sample used is based on convenience recruitment via online platforms, which limits statistical representativeness and means that it cannot be generalized to the entire French market. The results should therefore be interpreted as significant but exploratory trends. In addition, the analysis only focused on four major surf brands, all of which are already well known to the public. This limits the exploration of other dynamics that can be observed in emerging, local or alternative brands, which often have a more radical discourse on commitment or innovation.

Several avenues could be explored to extend this research. A comparative study between several European countries would enable us to observe how the logics of loyalty and image evolve according to cultural contexts. It would also be useful to explore the qualitative dimension in greater depth, through interviews or focus groups, in order to gain a better understanding of the underlying motivations of consumers, in particular the notions of identification, values and emotions.

Ultimately, loyalty in the surfing world goes far beyond simple satisfaction or repeat purchases: it is based on a whole range of emotional, cultural and symbolic dimensions. It is based on a complex alchemy of performance, values, emotions and cultural identification. It is this subtle combination, specific to a sector with a strong identity dimension, that brands must learn to master in order to build lasting, sincere and differentiating relationships with their audiences. Beyond the surf industry, these findings could also be applied to other niche sports or lifestyle markets, such as skateboarding, climbing or outdoor sports, where cultural identity, values and emotional attachment are also key drivers of loyalty.

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Appendix A: Quantitative survey - English version

Introduction

Thank you for taking part in this survey. Your responses will remain anonymous and will be treated as confidential. Estimated survey time: 5 minutes.

1. Do you practice surfing? If yes, how often?
   - Yes, occasionally (a few times a year).
   - Yes, regularly (1–3 times a month).
   - Yes, frequently (once a week or more).
   - No, I don’t surf.

2. What is your level of surfing experience?
   - Beginner (less than 1 year).
   - Intermediate (1-5 years).
   - Advanced (more than 5 years).

3. Which generation do you belong to?
   - Generation X (born 1965–1980)
   - Millennials / Generation Y (born 1981–1996)
   - Gen Z (born 1997–2012)

4. To what extent do you consider yourself environmentally committed when it comes to surfing brands? *(1 = Not at all committed, 5 = Very committed)*

   1 - 2 - 3 - 4 - 5

5. Choose the surf brand you're most familiar with:
   - Roxy.
   - Quiksilver.
   - Rip Curl.
   - Billabong.

- I've never heard of these brands.

6. Based on your experience with M (M=brand previously selected by respondent), please indicate the extent to which you agree with the following statements:

Note: The response scale is from 1 to 5, where 1 = Strongly disagree, 2 = Somewhat disagree, 3 = Neither agree nor disagree, 4 = Somewhat agree, and 5 = Totally agree.

6.1. M's brand is easy to recognise among other surf brands.
6.2. M's is well established in the surf market.
6.3. M's brand is associated with high quality products.
6.4. M's brand is perceived as innovative in the surf industry.
6.5. M's brand supports environmental and ecological initiatives.
6.6. M's brand is perceived as authentic and true to the spirit of surfing.
6.7. M's brand products meet my expectations in terms of performance.
6.8. M's brand products are durable and resistant.
6.9. M's brand evokes positive emotions in me.
6.10. I feel proud to own M's products.

7. Based on your experiences with M, please indicate to what extent you agree with the following statements:
7.1. I am loyal to M's brand and will continue to buy its products in the future.
7.2. I often recommend M's brand to my friends and family.
7.3. Even if another brand offers similar products, I will continue to buy from M because of my loyalty to the brand.

8. Based on your experiences with M, please indicate to what extent you agree with the following statements:
8.1. I am concerned about the environmental impact of surfing products.
8.2. Surf brands should support social and environmental causes.
8.3. Surf culture and lifestyle influence the brands I choose.
8.4. It's important to me that the surf brand I support is aligned with my ecological and social values.

9. How often do you buy surf products?

(It can be: technical surf equipment, wetsuit & accessories, surfwear & lifestyle apparel, beach & personal care, beach gear, media & decoration, accessories)

- Less than once a year.
- 1 to 5 times a year.
- 6 to 10 times a year.
- More than 10 times a year.

10. When buying a surf product, what is the most important aspect for you? (Rank from 1 to 5)

Price - Quality - Ecological and social values of the brand - Recommendations from friends/surfing community - Design and conception.

10.1.
10.2.
10.3.
10.4.
10.5.

Thank you for taking part in this survey! Your answers have been recorded.

You will contribute greatly to the understanding of the impact of brand image on consumer loyalty in the surf industry.

Master thesis: "The impact of brand image on French customer loyalty in the surf industry."

If you have any questions or would like some results, please don't hesitate to contact me: theo.delannoy@iscte-iul.pt.

Appendix B: Quantitative survey - French version

Introduction

Merci de participer à cette enquête. Vos réponses resteront anonymes et seront traitées de manière confidentielle.

Durée estimée de l'enquête : 5 minutes.

1. Pratiquez-vous le surf ? Si oui, à quelle fréquence ?
   - Oui, occasionnellement (quelques fois par an).
   - Oui, régulièrement (1 à 3 fois par mois).
   - Oui, fréquemment (1 fois par semaine ou plus).
   - Non, je ne fais pas de surf.

2. Quel est votre niveau d'expérience en matière de surf ?
   - Débutant (moins d'un an).
   - Intermédiaire (1 à 5 ans).
   - Confirmé (plus de 5 ans).

3. À quelle génération appartenez-vous ?
   - Génération X (né entre 1965 et 1980).
   - Génération Z (née entre 1997 et 2012).
   - Millennials / Génération Y (né entre 1981 et 1996).

4. Dans quelle mesure vous considérez-vous comme écologiquement engagé(e) en ce qui concerne les marques de surf ? (Échelle de Likert de 1 à 5).
   - 1= Pas du tout engagé(e)
   - 2= Peu engagé(e)
   - 3= Modérément engagé(e)
   - 4= Assez engagé(e)
   - 5= Très engagé(e)

5. Choisissez la marque de surf qui vous est la plus familière:
    - Roxy.
    - Quiksilver.
    - Rip Curl.
    - Billabong.
    - Je n’ai jamais entendu parlé de ces marques.

6. Sur la base de votre expérience avec M (M=marque sélectionnée précédemment par le répondant), veuillez indiquer dans quelle mesure vous êtes d’accord avec les affirmations suivantes:

Note : L'échelle de réponse va de 1 à 5, où 1 = Pas du tout d'accord, 2 = Plutôt pas d'accord, 3 = Ni d'accord ni pas d'accord, 4 = Plutôt d'accord, et 5 = Tout à fait d'accord.

6.1. M est facile à reconnaître parmi les autres marques de surf.
6.2. M occupe une position solide sur le marché du surf.
6.3. M est associé à des produits de haute qualité.
6.4. M est perçu comme une marque innovante dans l’industrie du surf.
6.5. M soutient des initiatives environnementales et écologiques.
6.6. M est perçu comme authentique et fidèle à l’esprit du surf.
6.7. Les produits M répondent à mes attentes en termes de performance.
6.8. Les produits M sont durables et résistants.
6.9. La marque M suscite en moi des émotions positives.
6.10. Je suis fier de posséder des produits M.

7. Sur la base de vos expériences avec M, veuillez indiquer dans quelle mesure vous êtes d’accord avec les affirmations suivantes:

Note : L'échelle de réponse va de 1 à 5, où 1 = Pas du tout d'accord, 2 = Plutôt pas d'accord, 3 = Ni d'accord ni pas d'accord, 4 = Plutôt d'accord, et 5 = Tout à fait d'accord.

7.1. Je suis fidèle à la marque M et je continuerai d’acheter ses produits.
7.2. Je recommande souvent la marque à mes proches.

7.3. Même si une autre marque propose des produits similaires, je continuerai d'acheter à acheter chez M.

8. Veuillez indiquer dans quelle mesure vous êtes d'accord avec ces affirmations suivantes :

Note : L'échelle de réponse va de 1 à 5, où 1 = Pas du tout d'accord, 2 = Plutôt pas d'accord, 3 = Ni d'accord ni pas d'accord, 4 = Plutôt d'accord, et 5 = Tout à fait d'accord.

8.1. Je suis préoccupé par l'impact environnemental des produits de surf.
8.2. Les marques de surf devraient soutenir des causes sociales et environnementales.
8.3. La culture du surf et le style de vie influencent les marques que je choisis.
8.4. Il est important pour moi que la marque de surf que je soutiens soit en accord avec mes valeur écologiques et sociales.

9. À quelle fréquence achetez-vous des produits de surf ? (Ex : vêtements et accessoires de surfwear/beachwear, matériel, équipement de surf, serviette, etc.)

- Moins d'une fois par an.
- 1 à 5 fois par an.
- 6 à 10 fois par an.
- Plus de 10 fois par an.

10. Lors de l'achat, quel est l'aspect le plus important selon vous ? (Classement de 1 à 5).

Le prix - La qualité - Les valeurs écologiques et sociales de la marque - Les recommandations d'amis/de la communauté surf- La conception et le design.

10.1.
10.2.
10.3.
10.4.
10.5.

Merci d'avoir participé à cette enquête ! Vos réponses ont été enregistrées.

Vous contribuerez grandement à la compréhension de l'impact de l'image de marque sur la fidélité des consommateurs dans l'industrie du surf.

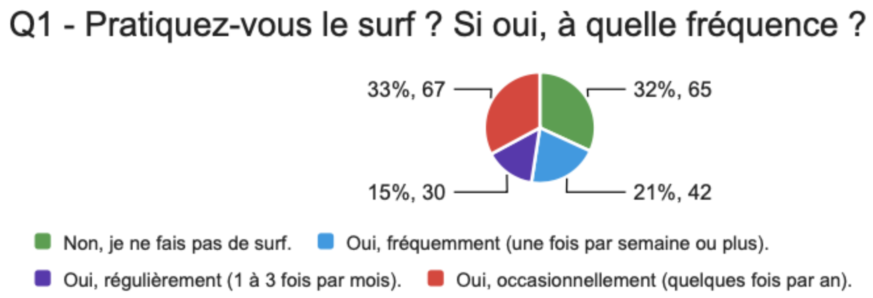
Mémoire de Master : « L'impact de l'image de marque sur la fidélisation de la clientèle française dans l'industrie du surf ».

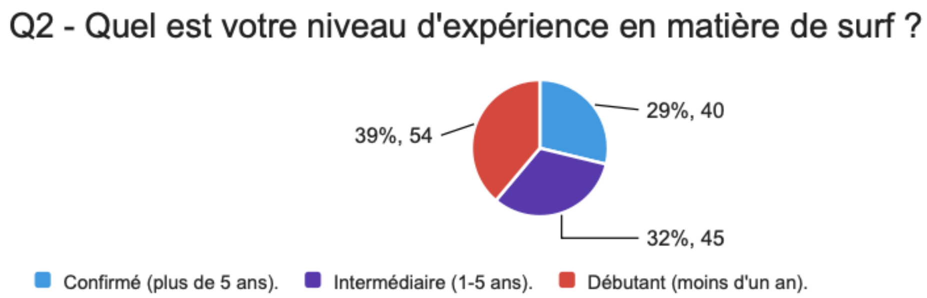
Si vous avez des questions ou si vous souhaitez obtenir des résultats, n'hésitez pas à me contacter : theo.delannoy@iscte-iul.pt.

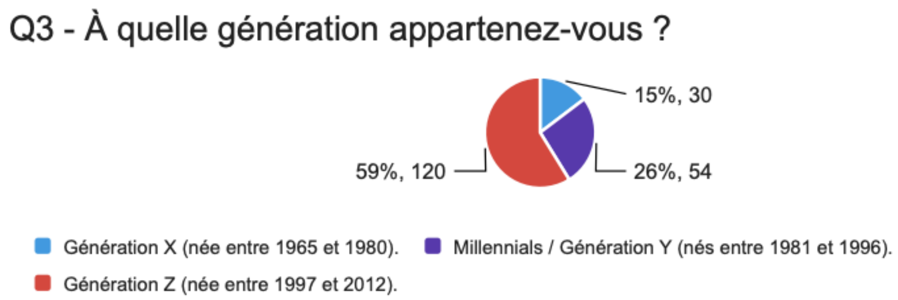
Théo Delannoy

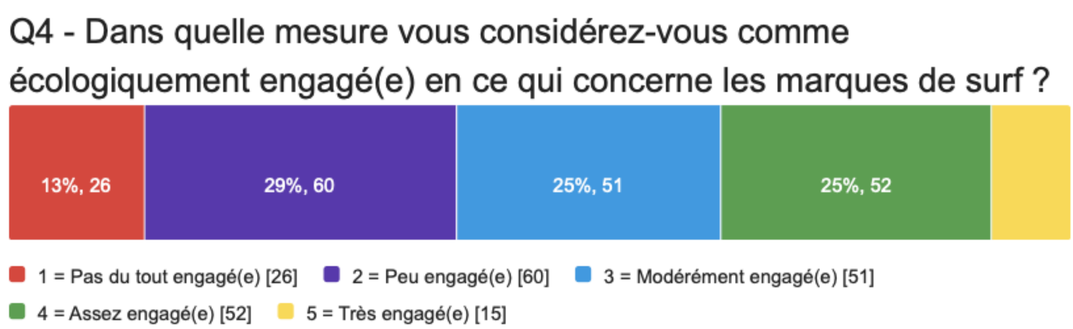
Appendix C – Results

Note: The graphs are presented in French in order to faithfully reflect the original terms used in the questionnaire administered to the French public.

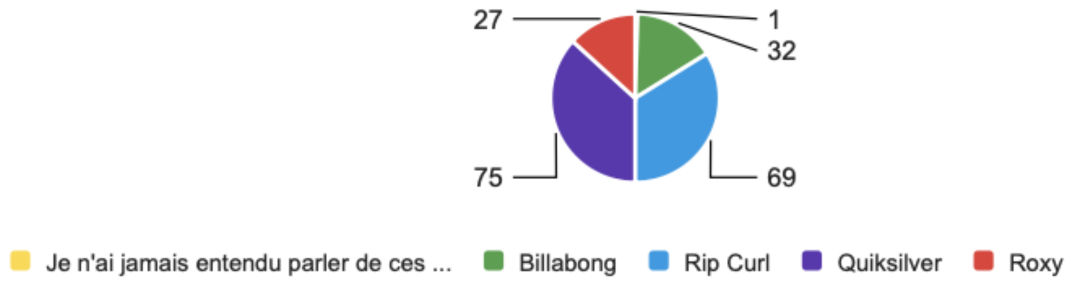








Q5 - Choisissez la marque de surf qui vous est la plus familière



Q6 - Sur la base de votre expérience avec [QID10-ChoiceGroup-SelectedChoices], v...

Champ	Moyenne	Réponses
[QID10-ChoiceGroup-SelectedChoices] est facile à reconnaître parmi les autres marques de surf.	4.17	133
[QID10-ChoiceGroup-SelectedChoices] occupe une position solide sur le marché du surf.	4.24	133
[QID10-ChoiceGroup-SelectedChoices] est associée à des produits de haute qualité.	3.77	133
[QID10-ChoiceGroup-SelectedChoices] est perçu(e) comme innovant(e) dans l'industrie du surf.	3.29	133
[QID10-ChoiceGroup-SelectedChoices] soutient des initiatives environnementales et écologiques.	3.20	133
[QID10-ChoiceGroup-SelectedChoices] est perçu(e) comme authentique et fidèle à l'esprit du surf.	4.00	133
Les produits [QID10-ChoiceGroup-SelectedChoices] répondent à mes attentes en termes de performance.	3.62	133
Les produits [QID10-ChoiceGroup-SelectedChoices] sont durables et résistants.	3.68	133
La marque [QID10-ChoiceGroup-SelectedChoices] suscite en moi des émotions positives.	3.95	133
Je suis fier(e) de posséder des produits [QID10-ChoiceGroup-SelectedChoices].	3.77	133

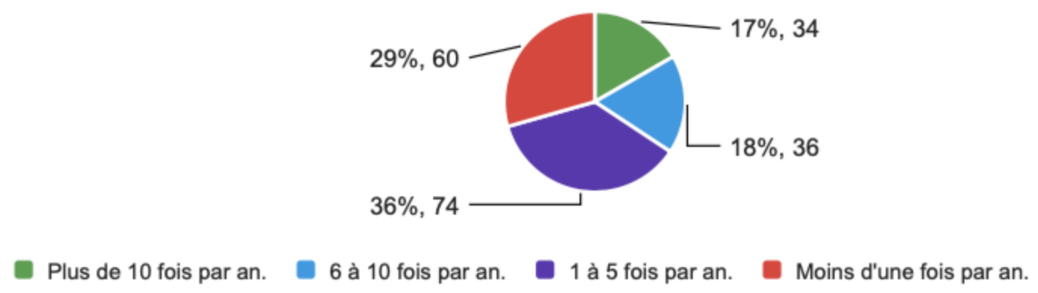
Q7 - Sur la base de votre expérience avec [QID10-ChoiceGroup-SelectedChoices], v...

Champ	Moyenne	Réponses
Je suis fidèle à la marque [QID10-ChoiceGroup-SelectedChoices] et je continuerai à acheter ses produits à l'avenir.	3.61	203
Je recommande souvent la marque [QID10-ChoiceGroup-SelectedChoices] à mes proches.	3.38	203
Même si une autre marque propose des produits similaires, je continuerai à acheter chez [QID10-ChoiceGroup-SelectedChoices].	3.16	203

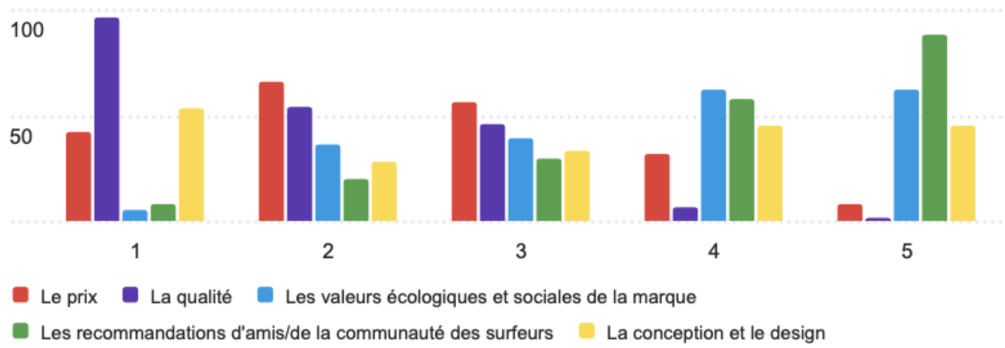
Q8 - Veuillez indiquer dans quelle mesure vous êtes d'accord avec les affirmatio...

Champ	Moyenne	Réponses
Je suis préoccupé par l'impact environnemental des produits de surf.	3.65	203
Les marques de surf devraient soutenir des causes sociales et environnementales.	4.32	203
La culture du surf et le style de vie influencent les marques que je choisis.	3.94	203
Il est important pour moi que la marque de surf que je soutiens soit en accord avec mes valeurs écologiques et sociales.	3.87	203

Q9 - A quelle fréquence achetez-vous des produits de surf ? (ex: vêtement et accessoires de surfwear/beachwear, matériel/équipement de surf, serviette, crème solaire...)



Q10 - Lors de l'achat, quel est l'aspect le plus important pour vous ? (Classemen...



Q10 - Lors de l'achat, quel est l'aspect le plus important pour vous ? (Classemen...

Champ	Moyenne	Réponses
Le prix	2.50	204
La qualité	1.84	204
Les valeurs écologiques et sociales de la marque	3.69	204
Les recommandations d'amis/de la communauté des surfeurs	3.97	204
La conception et le design	3.00	204

Appendix D - Multiple linear regression

Analysis objective: To answer RQ1, i.e. to empirically test the effect of the five brand image dimensions on customer loyalty, using a multivariate model.

The data collected from the quantitative questionnaire was exported to Excel for processing. All responses were scored on a Likert scale from 1 to 5. Incomplete or unusable responses were discarded. The final sample used for the analysis comprised 203 valid Respondents.

Following the recommendations of Keller (2003) and Thompson & Malaviya (2013), five dimensions of brand image were selected as independent variables:

X1 - Brand Awareness: average of responses to questions 6.1 and 6.2
X2 - Brand Association: average of questions 6.3, 6.4, 6.5
X3 - Perceived Quality: average of questions 6.7 and 6.8
X4 - Brand Personality: question 6.6 (authenticity)
X5 - Emotions: average of questions 6.9 and 6.10

The dependent variable, Customer loyalty (Y), is calculated by aggregating the responses to the three items in question 7:

- Intention to buy again (7.1)
- Recommendation (7.2)
- Resistance to competition (7.3)

β_0 represents the constant, i.e. the coefficient which is equal to the value of Y (level of reliability) when all the variables are zero.

ε represents the proportion of the observed reliability that is not explained by the X variables in the model.

The model tested is as follows:

Customer loyalty (Y)= $\beta_0 + \beta 1\, X1 + \beta 2\, X2 + \beta 3\, X3 + \beta 4\, X4 + \beta 5\, X5 + \varepsilon$

Linear regression results:

$R^2 = 0{,}412$

→ The model explains 41.2% of the variance in brand loyalty.

$F = 27{,}63$ and $p < 0{,}001$

→ The overall model is highly significant.

Variables	$\boldsymbol{\beta}$ Coefficient	p-Value	Significance
X1 – Brand Awareness	0,246	0,004	Yes
X2 – Brand Association	0,009	0,937	No
X3 – Perceived Quality	0,234	0,014	Yes
X4 – Brand Personality	0,109	0,227	No
X5 – Emotions	0,589	<0,001	Yes

The main validity assumptions of the multiple linear regression model have been verified:

- The Durbin-Watson test was carried out to verify the independence of the errors, giving a value of 1.52, close to the acceptable range [1.5-2.5], indicating an absence of significant autocorrelation between the residuals.
- Normality of residuals: the Shapiro-Wilk test reveals a slight deviation from normality ($p = 0.019$), but the statistic remains high (0.984), which is acceptable given the size of the sample ($n=203$) and the exploratory objectives of the dissertation.
- Homoscedasticity: the Breusch-Pagan test gives a p-value of 0.039, indicating slight heteroscedasticity, which should be interpreted with caution. However, the residuals

remain reasonably distributed, which does not call into question the robustness of the model.

- Multicollinearity: the VIF (Variance Inflation Factor) indices are all below 2 (except for the constant, which is expected), indicating that there is no problematic multicollinearity between the independent variables.

These verifications confirm that the use of a multiple linear regression model is statistically justified in this context, and that the results obtained can be reliably interpreted.

The model equation, with the estimated coefficients, is as follows:

$$Y = (-1{,}40) + 0{,}25\,X1 + 0{,}01\,X2 + 0{,}23\,X3 + 0{,}11\,X4 + 0{,}59\,X5 + \varepsilon$$

Below are the results tables:

Regression Statistics	
Multiple R	0,642013647
R Square	0,412181523
Adjusted R Square	0,397262272
Standard Error	0,712117127
Observations	203

ANOVA

	df	*SS*	*MS*	*F*	*Significance F*
Regression	5	70,05100562	14,01020112	27,627495	3,7768E-21
Residual	197	99,90082799	0,507110802		
Total	202	169,9518336			

	Coefficients	*Standard Error*	*t Stat*	*P-value*	*Lower 95%*	*Upper 95%*	*Lower 95,0%*	*Upper 95,0%*
Intercept	-1,402720397	0,441285216	-3,178716045	0,00171803	-2,2729697	-0,5324711	-2,2729697	-0,5324711
Brand Awareness X1	0,245457656	0,084210889	2,914797104	0,00397122	0,07938713	0,41152819	0,07938713	0,41152819
Brand Association X2	0,00891879	0,112018765	0,079618716	0,93662133	-0,2119911	0,22982865	-0,2119911	0,22982865
Perceived quality X3	0,234213863	0,094001772	2,491589859	0,01354301	0,04883494	0,41959279	0,04883494	0,41959279
Brand personality X4	0,109343177	0,09023086	1,211815744	0,22703439	-0,0685992	0,28728556	-0,0685992	0,28728556
Emotions X5	0,589196729	0,09166844	6,427476343	9,5677E-10	0,40841932	0,76997414	0,40841932	0,76997414