Welcome

Futures Webinar 2

The Future of Dinghy Sailing – Exploring ‘Pay on Demand’
Introducing tonight...

The Presenter

Matt Sheahan
Head of Performance Sailing, Sunset & Vine
Producer of World Sailing Show

The Panel

Mark Jardine
Editor, Yachts & Yachting online

Tony Bishop
Club Secretary, Queen Mary SC

Liz Rushall
Rushall Marketing

Alistair Dickson
Director of Sport Development, RYA
Welcome...

The Club Reps

Nigel Austin
Commodore
Cransley SC

Matt Wright
Director of Training
Emsworth SC

Mike Wigmore
Rear Commodore Sailing
Itchenor SC
Welcome...

The Millennials

Dom Breen-Turner
Ex-GBR & Wales Laser sailor.
Doctor. Occasional X boat sailor

Adam Parry
Sails a mixture of boats –
GP14, Lark, Scorpion and J111. Works for Selden
Pay on Demand Boating
The challenge for clubs
RYA Webinar – 7 November 2018
Introduction slides - recap on the Futures findings for sailing
Liz Rushall
The Future Customer project

RYA Webinar, May 2018 outlined Futures findings
Trends likely to affect future customers for sailing
The data behind the Futures research

SOCIAL TRENDS — INFO SOURCES

Silver linings – The Active Third Age; RIBA 2013
The Millennials Chapter; Bauer Media
Simon Sinek, Millennials in the workplace
National Travel Survey, Dept of Transport
RAC Foundation, 2014
Millennial Survey 2017, Deloitte
Shifting incomes and inequality between generations: Resolution Foundation, Feb 2017
Passion for Leisure; The Leisure Consumer Q4 2016, Deloitte
Real Living Research, 2016; Internet Advertising Bureau
Mobile Consumer Survey 2016, Deloitte
Catalyst, May 2017, Chartered Institute of Marketing
Forbes, 2016
Nielson Holidays
Future Trends in Sport – Sport & Recreation Alliance
Getting Active Outdoors report 2015, Sport England
Towards an Active Nation, Sport England Strategy 2016-21
Discover Boating / Grow Boating
NMMA
British Cycling
Xtrapolate – Get into Golf
Spike Marketing
Yoyo Design – Run Together

PARTICIPATION TRENDS — INFO SOURCES:

Arkenford Watersports Survey 2015, 2016 and older versions
Arkenford Omnibus tables – used for additional data analysis
Sport England Active People Survey
RYA Sport Development department; Training Department; Racing / Team 15; Powerboating department
RYA Affiliated Club Membership Survey 2013-15
RYA / Spike Club Member Survey 2016
RYA Club Census surveys 2013 to 2016
RYA Dinghy show visitor survey
RYA Training Briefing Feb 2017
British Marine research department
British Marine Key Performance Indicators 2015-16
British Marine Boaters and Boat Owners Survey 2016
Dominion Media – Yacht World Market Index
British Canoe Union Sport Development department
BCU Participant Survey 2012; BCU Participant Model for Paddlesports 2011
Team Watersports Survey 2013 (RYA, BCU, British Rowing)
Sport and Recreation Alliance Club Survey 2013
Info-Link
British Waterski and Wakeboard Association
Canal and Rivers Trust
Boards Authority Navigation Committee
Environment agency and Inland Navigation Authorities
Yachts and yachting.com
Various marine industry companies
Millennials / Gen Z – different interests

- Less disposable capital
- Less interest in ‘ownership’

- Technology changing how we buy
  ‘Collaborative Economy’ – do it now

- Attention spans reducing
  Online games, fitness

- Life style spend is up
  Will invest in ‘Experiences’
Changes in outdoor recreation – Gen Y & Z

Less interest

- Competition
- Formal training
- Organised sport

Moving towards...

- Personal challenges
- Go and do it Experiences
- Taking part for lifestyle reasons

Getting Active Outdoors 2015, Sport England
Small boat cruising & racing – age profile

Small boat cruising

Small boat racing

[Graphs showing age profile for small boat cruising and racing from 2002 to 2017, with age groups 16-34, 35-54, and 55 plus.]
A typical Club – membership age profile

Who will be your future ‘advocates’?

20 to 39
Membership – QMSC Select

![Bar chart showing membership distribution across different age groups. The age groups are: 8 to 18, 18 to 25, 25 to 40, 40 to 55, 55 to 70, and 70+. The 40 to 55 age group has the highest membership, followed by the 25 to 40 age group.]

[Logo of Queen Mary Sailing Club]
Cransley SC
2013-2018
by Nigel Austin
Questions?
Emsworth Sailing Club
Emsworth SC – started 1919

• 1919 few people owned boats – sailing a sport for the ‘elite’
• ESC started with a hire fleet of Sharpies
  • Then six Emsworth One Designs
• Members could join club and use club boat
  • for fraction of cost of ownership
Re-started with club Oppie – in 2000

• Parents who had grown up in sailing ‘hey day’
  • ‘kit’ Mirror dinghies etc.
• Introducing children to sailing
• First Oppie used for ‘Martletts’ training – juniors starter courses
• Helped parents decide if kids keen
Last decade

• Seen effects of cash rich / time poor families
• Busy doing many other activities
• Race turnouts dropping
• Modern dinghies – relatively more expensive
• More boats in boat park doing nothing
• ‘USE IT or LOSE IT’ Boat Park rule
Recent ESC club boats initiative

1. Relieves pressure on boat parking
2. Open up sailing for more people
   • Not essential to own your own boat
Club boats – to enable people to get afloat

- Without the 8 times / year requirement for boat park
- Started – with an RS Vision, club funded
- Three Bahais
  - Sport England grant funded
  - Adult RYA Training courses – in regularly use
Fleet growth

• Three Club Fevas – used by juniors and adults
  • Bought from Club funds
  • Boats sold on every year - aim to cover costs
  • New boats bought – package from RS

Recently bought Scow & 2 SUPs
How it works

- Fleet maintenance – part time bosun
- Current model:
  - Members pay hire fees
  - Helps to cover costs
  - Some resistance to recent fee increase
  - Some boats used more than others
- Considerations:
  - Good marketing - within the club
  - Help people ‘get’ the value compared to owning
  - How to book, rig etc.
  - Practical help on site – eg rigging/set up
Questions?
Itchenor Sailing Club - Background

* Location
* Club Ethos
* Experience Level
* Membership record
Our New Initiative

* Supported classes review
* Locating a suitable boat to fill the gap
* Embracing "pay to play"
Making taking part easy

* Simplified subscription payments
* Cheaper family memberships
* Join straight away, to get a free initial session
* Online booking
* Marketing initiative
Progress so far

* Usage
* New member generation
* New recruits to existing programme
Other Projects

- Rowing
- Underused Club Boats
Where to from here

* How to bring forward the new recruits
* New member support
* Does recruitment based on having a "sailing experience" really work
Questions?
RYA webinar series
Sharing learnings on potential solutions

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