The future customer for sailing
Webinar - May 2018

RYA Director of Sport Development – Alistair Dickson
Insights from the Futures Project – Liz Rushall, Rushall Marketing
Future of Youth Sailing – Mark Jardine, YachtsandYachting.com
The Future Customer project

Analysis of participation and socio-demographic trends Likely to affect future customers for marine leisure sector
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
Nielsen 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
Today

1. Participation trends
2. Social trends affecting potential membership
3. The challenge for clubs
4. Adapting for the future customer
Participation
What’s happening in windsurfing, motor boating and sailing
Windsurfing - participation

Windsurfing

Arkenford Watersports Survey data 2017
Windsurfing – age profile

Long Term Participation Trends by Age Groups (000s):

Arkenford Watersports Survey data 2017
Motor and power boating participation

Motor & Power Boating Participation

Motor Boating

Power Boating

Arkenford Watersports Survey data 2017
Motor boating – frequency of participation

Motor Boating Frequency

- Growth from Casualls - Once, 2-5 times
- Frequents 6-12, 13+ times

Arkenford Watersports Survey data 2017
Power boating & Motor Boating age profile

Long Term Participation Trends by Age Groups (000s):

- **Power Boating**
  - 16-34
  - 35-54
  - 55+

- **Motor Boating**
  - 16-34
  - 35-54
  - 55+

Arkenford Watersports Survey data 2017
Yachting participation

Arkenford Watersports Survey data 2017
Cruising – frequency of participation

Cruising - Frequency

Casuals - Once
Frequents
6-12, 13+ times

Arkenford Watersports Survey data 2017
Small boat (dinghy / dayboat)

Small Sailboat sailing and racing

Small sailboat - cruising
Small sailboat Racing

Arkenford Watersports Survey data 2017
Small boat sailing & racing — age profile

Small boat cruising

Small boat racing

Arkenford Watersports Survey data 2017
Yacht cruising & yacht racing – age profile

Arkenford Watersports Survey data 2017
A typical Club – membership age profile

Who will be your future ‘advocates’?
Lifestyle activities & social trends
Changes in behaviours
Canal Boating – age profile 2002-17

Growth for all age groups

Potentially reflects the levels of family participation

Arkenford Survey data, 2017
Watersports– age profiles 2002-17

Canoe / Kayak

Surf / Paddle / SUP

Arkenford Survey data 2017
Lifestyle watersports – why the growth?

Quick & easy  Affordable  Portable  Easy to store or hire  Accessible to many

Product innovation  Club house not essential  Use anywhere  Easy to learn / start  Low maintenance
The ticking time bomb

Population trendline in 10 years

Population now

UK Gov Population Census
Younger @Customers are doing things #Differently

### Formative experiences

- **Maturists** (pre-1945)
  - Wartime rationing
  - Rock’n’roll
  - Nuclear families
  - Defined gender roles – particularly for women

- **Baby boomers** (1945-1960)
  - Cold War
  - ‘Swinging Sixties’
  - Moon landings
  - Youth culture
  - Woodstock
  - Family-orientated

- **Generation X** (1961-1980)
  - Fall of Berlin Wall
  - Reagan/Gorbachev
  - Thatcherism
  - Live Aid
  - Early mobile technology
  - Divorce rate rises

- **Generation Y** (1981-1995)
  - 9/11 terrorists attacks
  - Social media
  - Invasion of Iraq
  - Reality TV
  - Google Earth

- **Generation Z** (Born after 1995)
  - Economic downturn
  - Global warming
  - Mobile devices
  - Cloud computing
  - Wiki-leaks

### Percentage in UK workforce

- **Maturists**: 3%
- **Baby boomers**: 33%
- **Generation X**: 35%
- **Generation Y**: 29%
- **Generation Z**: Employed in either part-time jobs or apprenticeships

### Attitude toward career

- **Maturists**: Jobs for life
- **Baby boomers**: Organisational – careers are defined by employees
- **Generation X**: “Portfolio” careers – loyal to profession, not to employer
- **Generation Y**: Digital entrepreneurs - work “with” organisations
- **Generation Z**: Multitaskers – will move seamlessly between organisations and “pop-up” businesses

### Signature product

- **Maturists**: Automobile
- **Baby boomers**: Television
- **Generation X**: Personal computer
- **Generation Y**: Tablet/smartphone
- **Generation Z**: Google glass, 3-D printing

### Communication media

- **Maturists**: Formal letter
- **Baby boomers**: Telephone
- **Generation X**: E-mail and text message
- **Generation Y**: Text or social media
- **Generation Z**: Hand-held communication devices

### Preference when making financial decisions

- **Maturists**: Face-to-face meetings
- **Baby boomers**: Face-to-face ideally but increasingly will go online
- **Generation X**: Online – would prefer face-to-face if time permitting
- **Generation Y**: Face-to-face
- **Generation Z**: Solutions will be digitally crowd-sourced

Barclays.com - Talking about my generation
Millennials / Gen Z – different spending habits

- Less disposable capital
- Less interest in ‘ownership’
- Technology changing how we buy
- Collaborative Economy’
- Attention spans reducing
- Online entertainment & 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
The challenge for clubs
No One Size Fits All
1. Who are your likely ‘customers’?

**Gen Y and Z**
- Less ownership
- New experiences
- On demand access
- Quick and easy
- Do / try many activities

**Extended families**
- Multiple generations
- Caring for elders
- Young children + late teens
- Multiple demands on time
- Doing many activities

**Active 3rd Age**
- Living longer
- Staying active
- Disposable income
- Travel
- Health & welfare

Generational Differences
2. Your competition?
Where your customers spend their time and £££?
3. Fix the leaky bucket!

1. Retain existing members
2. Attract new members – right age groups
3. Keep new members
4. Adapt for different lifestyles
5. Different spending behaviours
4. What’s in Your club ‘offer’?

**Membership**
- Ways to pay – Direct Debit
- Flexible schemes
- Monthly membership
- Contribution to profit
- Joining fees
- ... are they really needed!?

**Activities**
- Opportunities to learn
- Adventures / fun
- Events / challenges
- New activities – swim, paddle, board

**On Water**

**Shore Side**

**Socials & fun**
- Welcome & friendly
- Non-sailing activities
  - run, walk, swim?
- Use of spaces:
  - fitness, community?
Adapting what we do
Approach from the ‘customers’ perspective
Relevant experiences – your offer

Right product
Fun stuff for young people

Right place
Community coffee bar - out of peak times

Right time
Race training – when they get serious

Right price
Flexible membership packages
The steps towards a ‘buying decision’
The steps towards a ‘buying decision’

1. Hear about you
2. Read something
3. Check it out – Trip Advisor
4. Opportunity to try – Test Drive
5. Commit / Buy / Join
6. Keep doing it / Stay a member

©Watertight Marketing
Push the Boat Out / Taster Days

Word of mouth

Social media / Poster

Website / recommendation

Take part – sailing session

Errrr... What next .....?

Next step needs to be easy!

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Next big step – reducing the hurdles

- Club fees
- Joining Fee
- Insurance
- 2nd Hand Boat
- Boat Park
- Harbour dues
- Gear / parts
- Tow bar
- Lessons
- Refit
What are their pain points / your barriers?

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<th>NEXT STEP FORWARDS</th>
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<td>BOAT – 2\textsuperscript{nd} Hand Laser 2000</td>
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<td>Insurance</td>
<td>90</td>
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<td>Club Membership</td>
<td>150</td>
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<tr>
<td>Joining Fee</td>
<td>150</td>
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<tr>
<td>Boat Park / mooring / Harbour dues</td>
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<td>Clothing – wetsuit, PFD, boots x 2</td>
<td>1000</td>
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<td>Chandlery &amp; parts</td>
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<td>Tow bar / trailer</td>
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<tr>
<td>RYA membership</td>
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<td>(£45 - pays for itself; discounts!)</td>
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<tr>
<td>Sailing lessons</td>
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<td><strong>Total</strong></td>
<td><strong>£4,725</strong></td>
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Your club challenge

“*You can do* whatever you set out to achieve....”
Top 10 Tips – who, what, how, when

1. Understand your customer
   Desired & current

2. More tailored products & services

3. Create easy steps forwards
Prioritise key stages

4. Awareness / Interest
   Easy to find and relevant

5. Evaluate / Try
   Endorsement Demos - Test Drive

6. Adopt – JOIN
   Retain Loyal members

How to improve – Step by Step changes
   Do the easy, simple changes first
‘You can’ attitude and culture

7. Try new things
8. It’s OK to Fail ... ...move on
9. Be Friendly
10. Take your team on the journey
If you do nothing else – check the signs!

Private Club.
New members welcome.
“Shoot for the moon. Even if you miss, you’ll land among the stars.”

Norman Vincent Peale
Thanks for listening

Find out more:

www.rushallmarketing.com/future-of-sailing