

The future of UK sailing [Katy Stickland](#) November 2, 2018 Yachting Monthly

Sailing in the UK is changing. Will Bruton takes an in depth look at what's happening, seeking opinion from experts across the industry

'How did you get into sailing?' is a question with an often assumed answer.

The recent film dramatisation of Arthur Ransome's *Swallows and Amazons*, a halcyon day's tale of adventure under sail, couldn't have distilled the raw appeal much better to children. It did little, however, to give an impression that it is an accessible sport to any non-sailing parents.

Two reports were commissioned to investigate the state of the UK marine leisure market.

The first *British Marine: Futures*, compiled in 2017 by Liz Rushall, looked at the state of play within UK sailing.

image: <https://keyassets.timeincuk.net/inspirewp/live/wp-content/uploads/sites/20/2018/11/SwallowsandAmazons.jpg>



The raw appeal of sailing is clearly put across in the book and film

The second report, *Segmentation and Barriers to Boating*, by market research company Arkenford, looked at why people were not taking up, or were stopping sailing.

Combined, they give the most in-depth appraisal to date of the current state of sailing in the UK and the reasons behind it.

At the crux of the *Futures* report are indicators that access to our pastime is repeatedly cited as an obstacle too great for many.

Furthermore, we increasingly compete with new sports that are seen to be easier ^[1]_[SEP]to get into, such as paddleboarding, and, whilst the noticeable boom in large yacht sales would suggest the industry is flourishing, the reality is that this is underpinned only by the baby-boomer generation.

Sailing is in a period of flux, and while neither of the reports claim to have a magic solution to boost participation, they have been able to identify several trends that could be exploited in order to bring new participants of every generation on board.

Read more at <https://www.yachtingmonthly.com/news/future-uk-sailing-68018#HsBXxqAu6FSdh4es.99> Whilst a rapidly changing market is an issue for the marine industry, it is also one for the leisure sailor. Fewer new yachts are being built between 20-40ft, meaning that making the leap from dinghy to cruiser may be seen as too great by many.

Clubs that are struggling to bring in new members are facing the reality of declining memberships, bringing their continued existence into question. Rather than actively causing its decline, the traditional pathways into yachting have passively allowed things to stagnate.

This, combined with increasing yacht ownership costs, means a gap is emerging between those that already own a boat and a new generation that is not getting onto the ladder of yacht ownership.

Liz Rushall researched and wrote the *British Marine: Futures* report, which looks at these issues. We spoke to her about her findings to understand what it might mean for cruising sailors.

So, what was the research about?

Early in 2017 British Marine, the marine industry trade association, commissioned a project to understand the future customer for boating.

The project remit included looking at all existing published data on participation, assessing changes in buying habits that will likely affect the leisure boating sector.

Christened the *Futures* project, the final report is a substantial document with a section for each activity and includes recommendations for British Marine to take forward.

The RYA and British Canoeing supported the project with access to data, and the RYA recently ran a webinar based on the *Futures* implications for sailing, for its affiliated clubs and classes, that is available to view online.

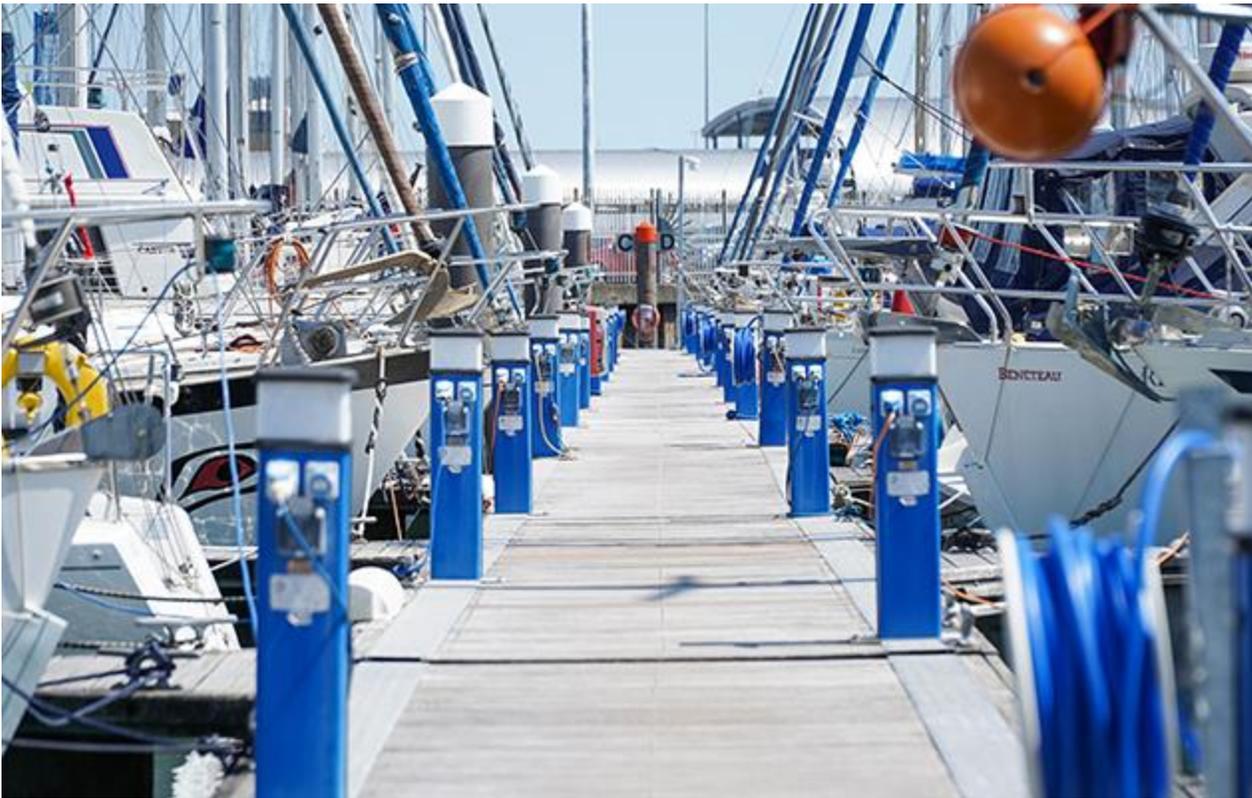
What's changed recently?

Since 2002 participation in sailing is trending downwards. Encouragingly, yacht cruising, and to a lesser extent yacht racing, have rallied since 2015, although the overall trend is still down.

The majority of participants, 'casuals', only sail between 1-5 times a year, and represent three times the number that sail frequently, suggesting there is an opportunity to find new ways to encourage and enable casuals to sail more regularly.

Of particular concern is the drop in numbers of 16-34 year olds in yacht racing and cruising, small boat sailing (dinghies and open dayboats) with small boat racing worst affected. Since 2010, numbers have rallied although overall the trends are still down.

image: https://keyassets.timeincuk.net/inspirewp/live/wp-content/uploads/sites/20/2018/11/webBritishMarine_SeaWork2018-53_216873651_320623802-2.jpg



Is the cost of a berth putting off the younger generation from sailing? Credit: British Marina

The picture is not much better for the 35-54 year olds, except for yacht cruising, which is stable. Yet the 55+ age group is growing in most activities, which is keeping the sailing industry ticking in the short term.

The big question is how long can this be sustained, and how can we attract ^[SEP]the younger generations?

Many clubs are seeing a dip in members aged 20-40, and these trends suggest the often-held concept that young people learn to sail, go to college or start families before returning to sailing later in life, is not holding true.

Conversely, watersports such as paddleboarding, kayaking and surfing are growing across all age ranges for a variety of reasons.

The development of inflatables has opened up the activity to many more people. The equipment is portable, easy to store, can be hired rather than purchased, launched anywhere, and sessions can be short.

A sign of the times?

The UK census data suggests that in 5–10 years time the overall numbers of adults age 55+ will reduce and there will be fewer 20-30 year olds.

Every leisure activity will be competing for this group's time and money.

Consumer and social trends research data shows that younger generations consume media products and services very differently from their parents, due to technological and social trends.

The Millennial mindset?

The Millennial generation (mid 20s to late 30s) wants to try new and different experiences and is less likely to own things such as houses and cars.

With 80% of people now living in cities, the collaborative economy has created opportunities for easily sharing assets, such as houses, and booking instant services, such as UBER cars.

Sport England also identifies a move away from formal training, which is reflected in British Canoeing and the RYA's starter training figures, and also from organised sport.

The move is towards accessible experiences, personal challenges, shorter formats and natural fitness. Activities such as Boot Camps and Park Run fit this model.

More than 10,000 people participate in Swim Windermere each year and over half a million people have done Tough Mudder since 2010.

Social sailing

Digital trends and social channels such as WhatsApp are enabling virtual 'clubs' to organize activities, and technology is changing how people participate.

Wii Sports has people doing outdoor sports at home. Artificial intelligence, virtual and augmented reality are creating activities unheard of 10-15 years ago.

Apps such as Zwift have cyclists training and racing from home against riders worldwide, with the full physical and visual experience of the iconic routes. It's safe, quick and can be done anytime.

image: https://keyassets.timeincuk.net/inspirewp/live/wp-content/uploads/sites/20/2018/11/webIMG_5890_224932051_320623802.jpg



Sailing has to adapt if it is to appeal to a wide range of groups

Society is also seeing a more active 'third age', living longer, and more complex families with ^[1]more generations to look after, and wider age ranges of children due to re-marriages.

Attention spans are getting shorter, and many sports offer alternative formats to encourage participation. Rush hockey, cardio tennis and walking football are examples of sports that have adapted to appeal to different groups.

The demand for spontaneity

Perhaps most important for retaining young people are Sport England's findings indicating they want activities that enable them to interact, spend quality time with friends, share their experiences, and are spontaneous, accessible and easy to organize.

Here could be another tripping point. For the last couple of decades, many UK clubs have developed programs of formal training for young people based on race training models originally designed for young adults.

Often in single-handed dinghies, very young kids are sent afloat in all weathers to sail around buoys, with someone blowing whistles and shouting instructions.

Educationalists have evolved the teaching of sport to young children to be much less directive.

It raises the question whether race-style training for the very young creates the best, fun and memorable experiences that will help to keep them engaged?

Certainly, a competitive pathway system is essential for success in any sport.

image: https://keyassets.timeincuk.net/inspirewp/live/wp-content/uploads/sites/20/2018/11/webBritish-Marine_MG_0129_216873622_320623802.jpg



Sailing now has to compete with other more accessible sports. Credit: British Marine

As with marketing any good product, it needs to be offered at the right time, and only when its relevant, such as if that person shows interest in competing.

Given the decline in adults age 16 – 34 and beyond, a genuine concern is that there is a generation that may not have had the best experience, and may well not return given the plethora of other activities available.

Many of the current 55+ generation grew up messing about in boats and may have taken up racing en route.

What is essential now is trying different formats to engage people of all ages, and encourage more to adopt 'sailing for life'.

Moving forward

Having completed the analysis it feels like every marine organization, in addition to the governing bodies, needs to understand their current and future customer base and adapt their product offer and services accordingly.

Sailing is a fantastic sport with different craft of all sizes, for all ages and experiences. The social, well-being, physical, emotional and learning benefits are extensive.

Yet that message, through factors including access, experience, changing needs, overall image and marketing, is simply not strong enough.

With people wanting experiences in preference to owning kit, we need new models addressing costs ^[1]_{SEP} and accessible solutions, to enable both initial and ongoing participation.

Retaining new and existing participants of all ages is critical. Well-maintained craft that can be hired to customers or members, and turn-up-and-go services will likely appeal to people with cost and time restrictions.

Design and innovation is important too, experimenting with alternative formats and also the hardware and equipment.

If inflatables can radically change participation for kayaking and SUP, equipment that makes things easier to rig, store and maintain could mean more time actually doing the activity than preparing for it.

Making sailing more accessible

The participation trends show people undertake multiple leisure activities, not just one sport.

For busy families with different interests, offering fitness, social or cultural activities may be strategies to maximize membership and increase footfall through under-utilized assets, such as club buildings.

Removing some of the barriers that create perceptions of elitism is important too.

Sailing can learn a lot from how other leisure activities are being promoted, in terms of language, tone of voice and imagery.

image: https://keyassets.timeincuk.net/inspirewp/live/wp-content/uploads/sites/20/2018/11/webTYW-23-Santino-Martinez-240-_1__218141531_320623802.jpg



Many are choosing a holiday to learn how to sail

Taking a 'mystery shopper' approach to understand the member/customer experience may reveal areas for improvement too. The gym industry has had to reinvent itself. Look at their welcome signs, flexible memberships and no joining fees.

Raising the profile of the sport online is essential, as is making sure people can easily find and book experiences by mobile device.

The current online experience for newcomers is poor compared to many other activities.

Pay-and-play operations exist for sailing, but many organizations are too small to have sufficient marketing clout to be easily found.

A key recommendation made to British Marine in the *Futures* report was to initiate, with the support of the industry and other governing bodies, the creation of a central digital platform under one memorable name.

Listing all providers of sailing activities on one easy-to-use digital platform is already technically possible. It just needs the investment and effective marketing to give sailing a chance to attract and retain people in a fantastic 'sport for life'.

5 Key findings of the Marine Futures report:

1. The Futures report identifies irreversible trends. The impact of the 2008 Financial Crash continues to be felt as disposable income remains under pressure. Future generations have less desire to own assets such as cars or boats.
2. The Futures research would indicate that many Millennials see boating as a sport where 20-30 year olds prefer functional and lifestyle experiences. The leisure boating sector has historically sold products rather than lifestyle

benefits, and what is clear is that new generations are not attracted by detailed information or the traditional learning models, such as undertaking a training course.

3. There is also less desire to become a 'Club' member and own expensive assets such as boats and all that this entails but more importantly, finding access to equipment or the opportunity to try something new is what future consumers desire.
4. Millennials are seeking a range of different experiences and the participation in just one or two hobbies or sports such as regularly sailing or boating is becoming less appealing.
5. Consumers expect instant gratification and lack the patience to break barriers such as finding a boat and joining a club. The solutions must be easily accessible. Sailing and boating can be seen to be both complex and confusing and it is vital that such barriers are identified and removed wherever possible.

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