



Arthur J. Gallagher
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Duncan Truswell
RYA Sport Development Manager

Sport Development, Statistics & You



About Sport Development

- Funded principally by Sport England and RYA central funds;
- Employ central staff organising programmes & supporting field based staff within regions:
 - Regional Development Officers;
 - Disability Development Officers;
- Programmes: OnBoard, Active Marina, Sailability, Participation Pathway & Club Development, Push The Boat Out;



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Purpose

**To Promote and Protect Safe,
Successful and Rewarding
British Boating**

Mission 2013-17

To become more relevant to more boating communities in order to be more representative and influential



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Participation

What is Participation???

Purpose

To kindle, nurture and support a life-long passion for boating in all its forms by all groups of participants

2017 Mission

To have a vibrant, sustainable network of clubs and other organisations in order to make boating more accessible and attractive to all

Goals

- Develop targeted participation programmes with clubs, centres, marinas and class associations to:
 - Grow adult participation in all disciplines
 - Further widen accessibility for young people
 - Reduce 14-24 participation drop-off and build a credible higher education/ further education programme
- Step-change disabled participation to 50,000
- Improve data capture, measurement and evaluation of all RYA activity
- Create a holistic club development strategy to deliver real value to every affiliated club
- Focused activation in 180 key modernised clubs
- Feed the UK talent pathway via regional squads
- Improve the marketing of boating and of the RYA



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1. Research & data;
2. PR, Communications & Marketing;
3. People & Partnerships;
4. Programmes – PTBO & TW's;





Sport Development Tactics

- 1. Introduce new people to the sport and develop a regular habit for sailing;***

OB, PTBO, Universities, Start Sailing & Participation Pathway, Shows, Events, Digital strategies, Industry influence, Yachting Press etc.

- 2. Prevent drop off of current participants, and prevent a trend towards less frequent participation;***

Participation Pathway, Universities, BKA, Team Racing, OB/training Pathway, Targeted marketing & communications, up skilling & informing networks.





Sport Development Tactics

3. Make our existing occasional/less frequent participants more frequent,

Participation Pathway, Active Marina, Dinghy Show, participation monitoring and sharing.

4. Extend the Sailing Season – In order that our infrequent/seasonal participants begin to participate more frequently and develop a more regular habit;

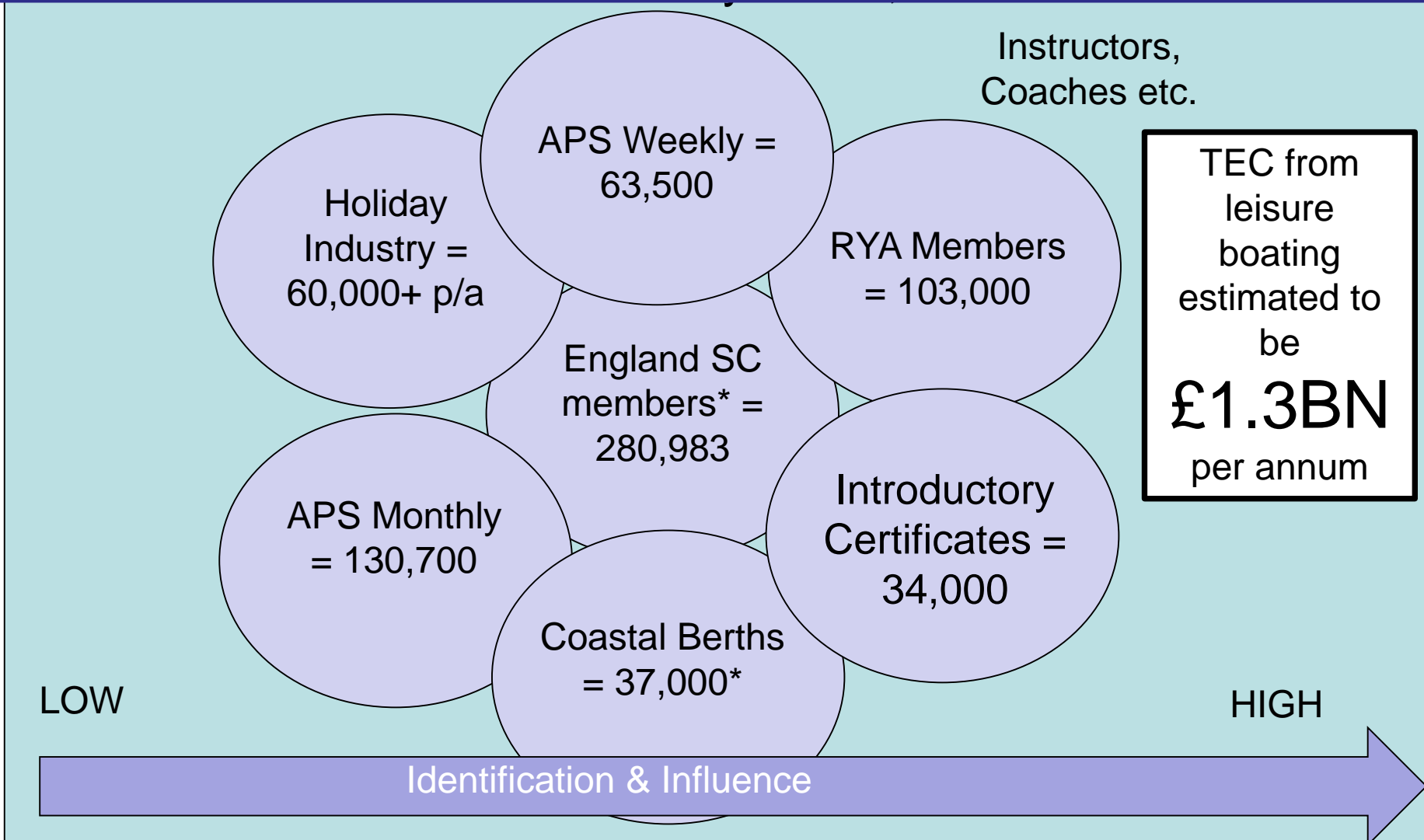
[PR & Comms](#), Social media, Dinghy Show, Yachting Press, collaboration with trade, interventions with clubs.



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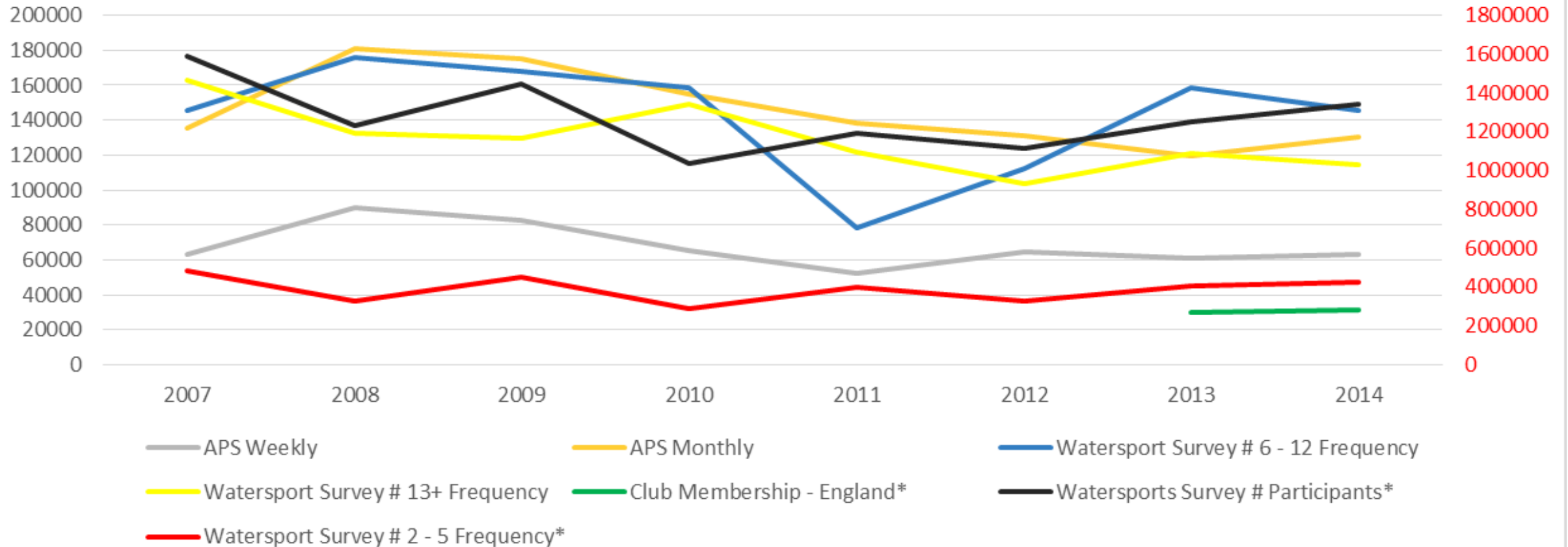


Watersports Survey = 1.34M (relevant non-power) 'sailing' participants





Outcome/survey measures of overall participation & membership



* = secondary axis



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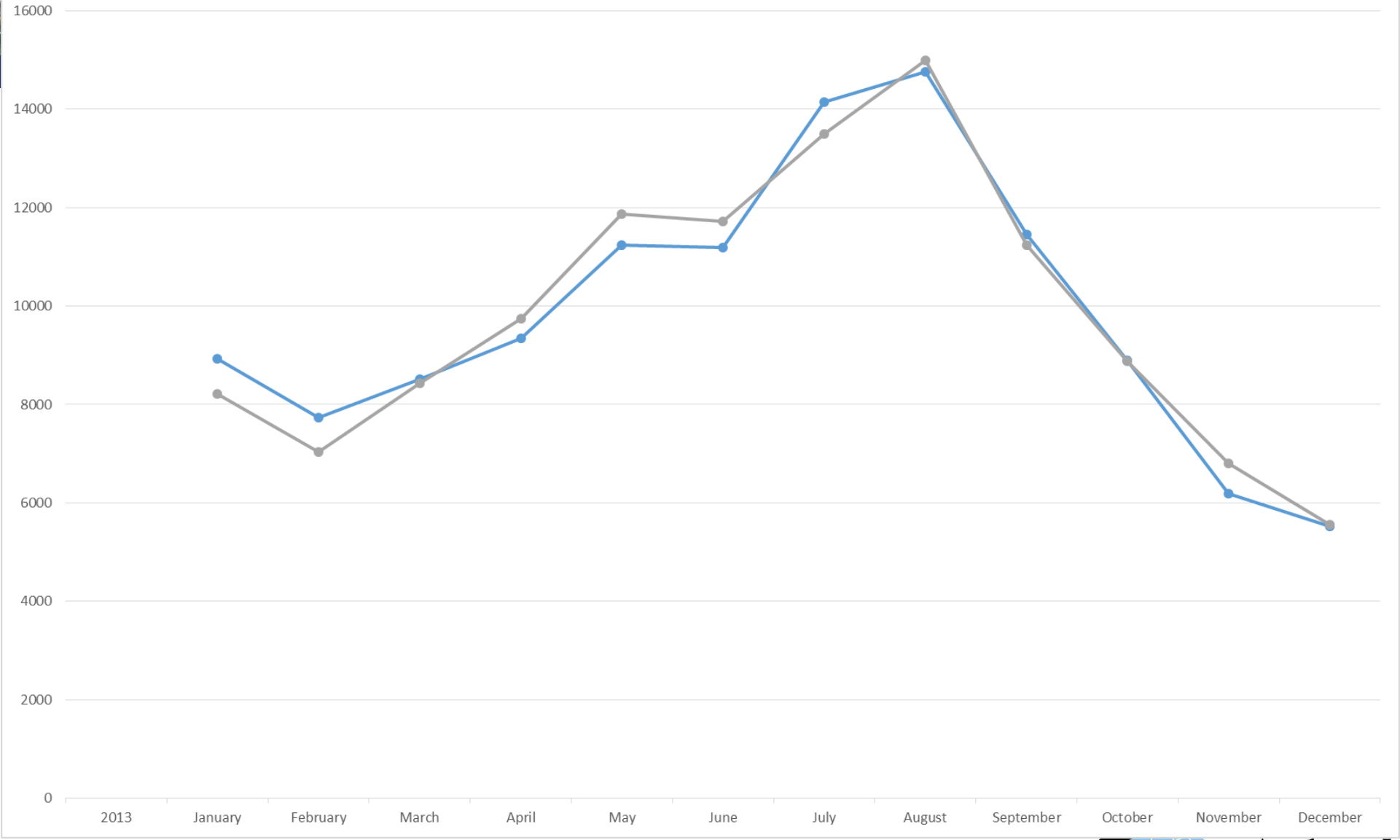
What else do we know?

- Recent Environment of GROWTH – RYA membership, RYA Club census, Sport England APS, Arkenford Watersports Survey;
- 2.84M participants – UK Boating (inc. Power etc.);
- 2M with a degree of regularity (the rest are very occasional or ‘tasters’)
- Overall growth since 2010 but conversion from occasional/tasters remains challenging;
- Most regular participants do so 2 – 5 times p/a;
- There is Latent Demand for Sailing:
 - Sport England Active People Survey/SPA Future Thinking
 - RYA Start Boating web stats & Push The Boat Out;





Start Boating: Page Views per months 2013 vs 2014



Grey = 2014, Blue = 2013



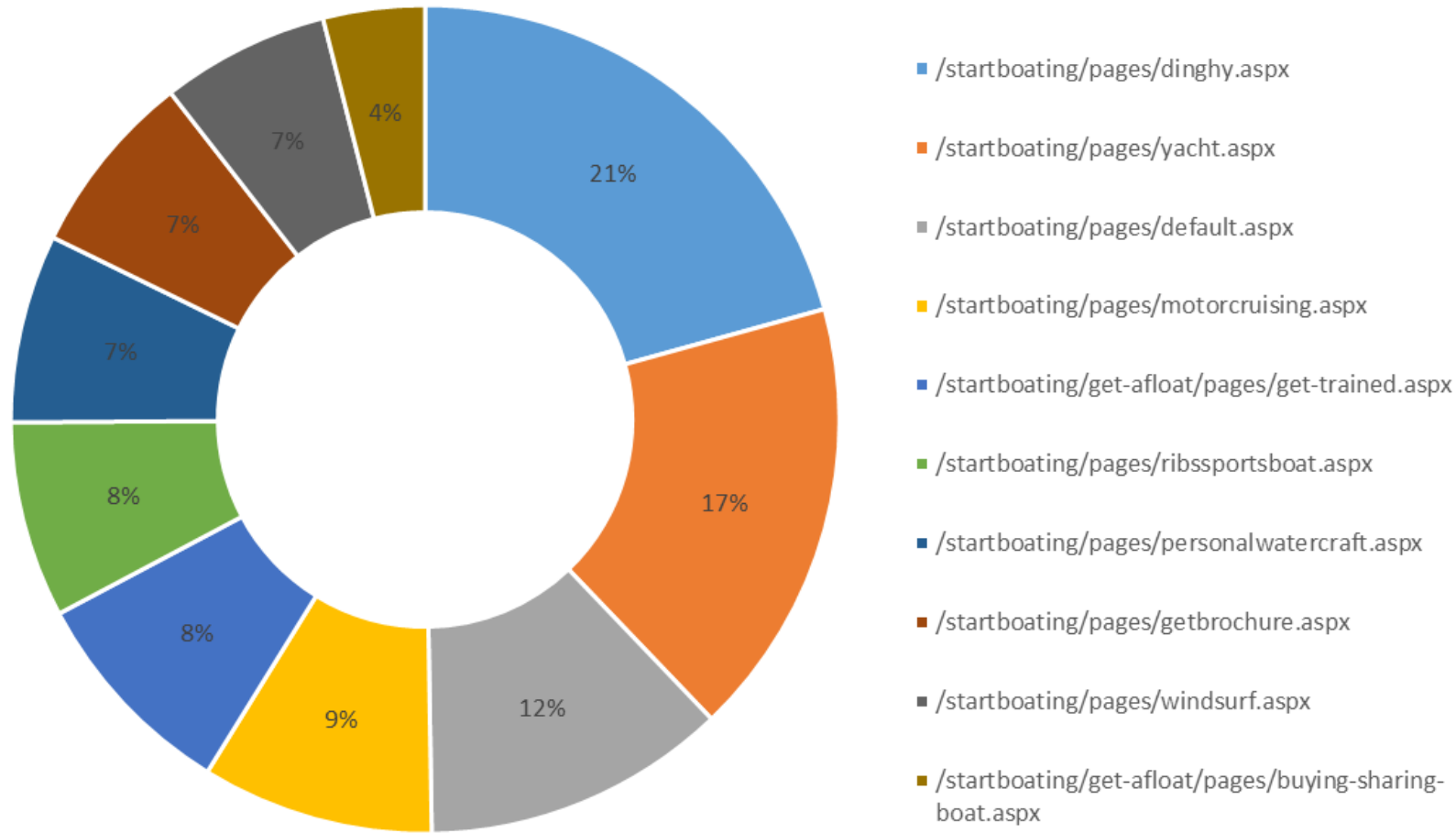
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Latent Demand:

1. 55 – 64 years of age;
 2. 45 – 54 years of age;
 3. 35 – 44 years of age;
 4. 16 – 25 years of age;
- Recreational Dinghy Sailing;
 - Recreational Yachting/Cruising;





Start Boating – clicks by interest (last 2 years combined)





Consumer Insight:

→ Perceived attributes of venue and single sports

The combined watersports offer is perceived more positively than the individual sports. There is a strong emphasis on fun and inclusivity

	Combined watersports offer	Rowing	Canoeing	Sailing
Fun	78%	37%	51%	43%
Sophisticated	11%	16%	10%	29%
Competitive	24%	44%	32%	30%
Physically demanding	40%	63%	53%	47%
Technical	17%	28%	29%	51%
Open to all	52%	29%	33%	25%
Popular	62%	27%	32%	27%
Social	54%	33%	29%	32%
Individual	18%	36%	50%	26%
Alternative	19%	17%	21%	22%
Modern	33%	17%	21%	20%
Elitist	6%	27%	11%	38%

KEY:
 High resonance
 Potential barriers
 Neutral

Q14/Q15. Here is a list of words – which do you think best describe the multiple watersports and activity centre and these other single sports?
 Base: All interested in offer (Total sample -2042)





Consumer Insight:

Important factors – Index table

	1	2	3	4	5	6	7	8	9	10	11	12	13
Total	88%	82%	79%	63%	63%	58%	56%	52%	48%	48%	47%	46%	38%
Small sail boat racing	0%	10%	9%	13%	10%	29%	34%	28%	31%	33%	31%	26%	41%
Small sail boat activities	6%	10%	7%	7%	-11%	15%	16%	24%	15%	16%	15%	14%	6%
Yacht racing	-12%	-25%	-11%	0%	-18%	-26%	11%	-18%	-3%	16%	6%	-11%	6%
Yacht cruising	-3%	5%	9%	3%	-5%	2%	5%	11%	11%	2%	5%	-5%	-1%
Power boating	5%	10%	13%	-9%	2%	29%	23%	29%	29%	11%	15%	4%	4%
Motor boating/cruising	5%	1%	9%	5%	10%	21%	18%	16%	15%	4%	7%	8%	-3%
Canal boating	-4%	4%	8%	-1%	5%	15%	17%	11%	1%	-2%	-4%	7%	-9%
Windsurfing	-2%	4%	10%	15%	5%	28%	11%	22%	0%	14%	13%	8%	9%

Key

- 1 Better weather
- 2 More free time
- 3 Having friends or family to go with
- 4 Cheaper transport or travel cost
- 5 Increasing my confidence/comfort on the water
- 6 Cheaper cost of boats/equipment
- 7 Increase knowledge on where I can actually go boating (accessible waterways/sea)
- 8 Understand of where to put my boat/craft into the water (access points)
- 9 Need training/coaching to improve my skill level
- 10 Easier access to a club/facilities
- 11 Access to more flexible training opportunities
- 12 More information on where I can hire boating/watersports equipment
- 13 Easier access to a competitive club/event

The graph shows the index of reasons by activity.

The brighter the green figure, the more relevant this reason is for that individual sport and the darker the red figure, the less of a reason it is for the sport



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Marketing

- Start Boating Collateral & digital optimisation;
- Marketing, Communications & Social Media;
- Shows & Events;
- Push The Boat Out;
- Ambassadors & Influence;





People & Partnerships:

- Other RYA departments – particularly Training & Membership;
- Affiliated Clubs & Recognised Training Centres;
- Sport England, County Sports Partnerships, RYA Home Countries & HC Sports Councils;
- Other Watersports & BMF;
- Sailing Charities;
- Sponsors;



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Push The Boat Out 2015

All about new & potential participants connecting with their local sailing club or provider and discovering just how easy it is to get involved:

- 09 - 17 May 2015 – 400 providers (100 RTC's, 300 affiliated clubs);
- Free or discounted taster sessions;
- RYA PR/Communications/Digital Marketing;
- Push The Boat Out resources & collateral;
- 'Essential Guide' & Activator workshops;





How you can help?

1. Be as successful as possible – exploit the resources available: Google RYA KYC, determine your target market, think about your shop window and sell sailing;
2. Develop your on-line presence;
3. Develop your retention offer or signpost to a local club;
4. Push The Boat Out!
5. Extend your operating season – where viable;
6. Outreach & Outcomes – pilots, projects & research;

