

# One Design Sailing



*Individual survey results*  
*2,293 Responses 59% Completion rate*





## ONE DESIGN SAILING SURVEY

- 2293 TTL Responses
- 59% Completed the survey
- 894 may not have answered all the questions

We feel confident though that the results represent a statistical sample.



# **US Sailing One Design Committee surveyed individual sailors and one design classes**

- **Surveys develop baseline**
- **Develop growth strategies**
- **Assist One Design Classes and Organizations in supporting the sport**
- **Surveys will be repeated to track trends**



## **Why Survey?**

- Define our sailing audience
- Develop Baseline data
- Base growth strategies on trends
- Assist O.D. Classes & Organizations for targeted marketing
- Develop Trends over time by repeating surveys



# Methodology

for the individual survey:

The surveys were available October 6, to December 6, 2022 and were promoted through:

- Class Leadership contacted through US Sailing Class information
- US Sailing Weekly Lift & Quarterdeck publications
- One Design Leadership Forum Facebook
- Scuttlebutt Sailing News
- US Sailing Championships Event



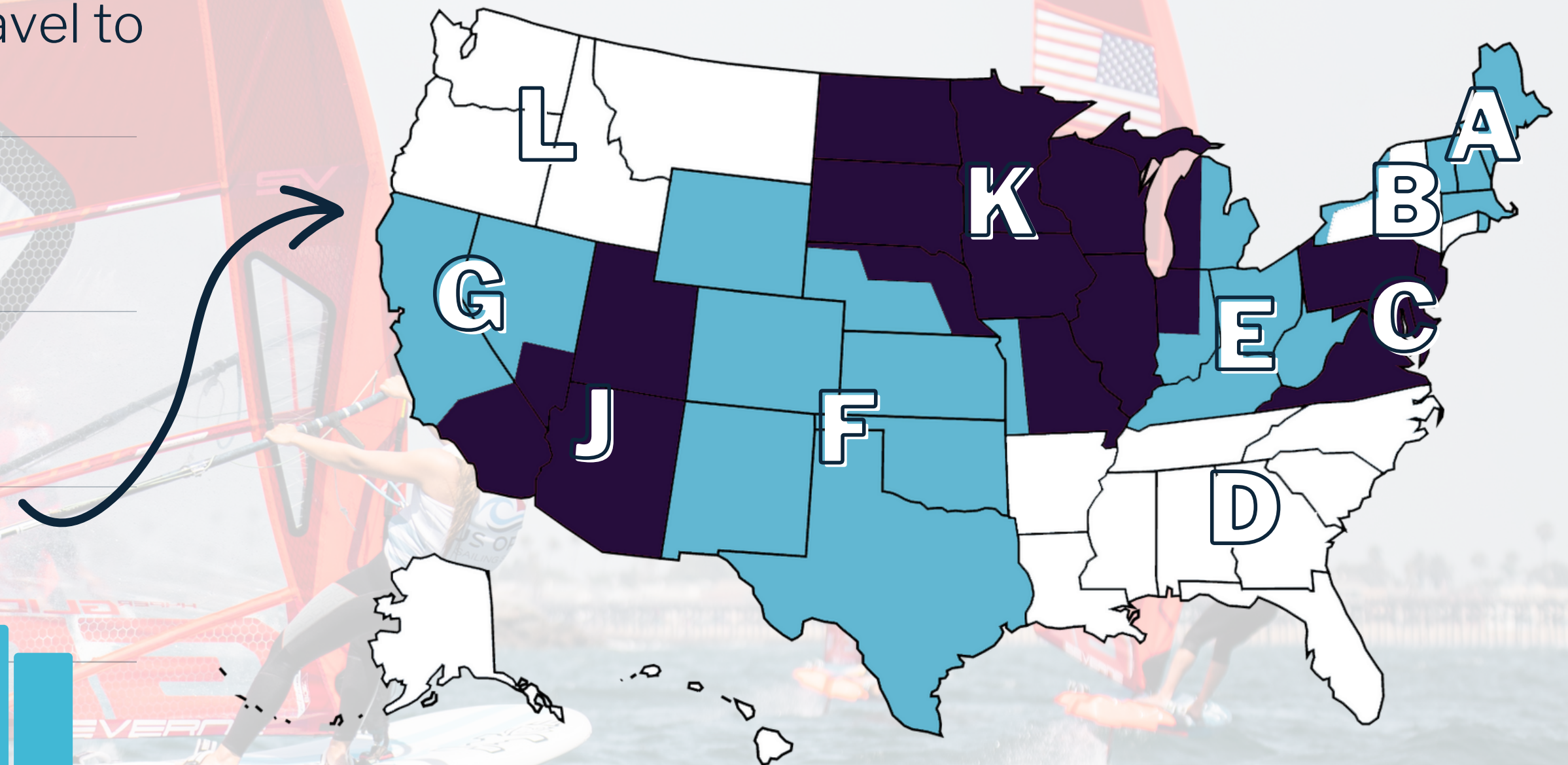
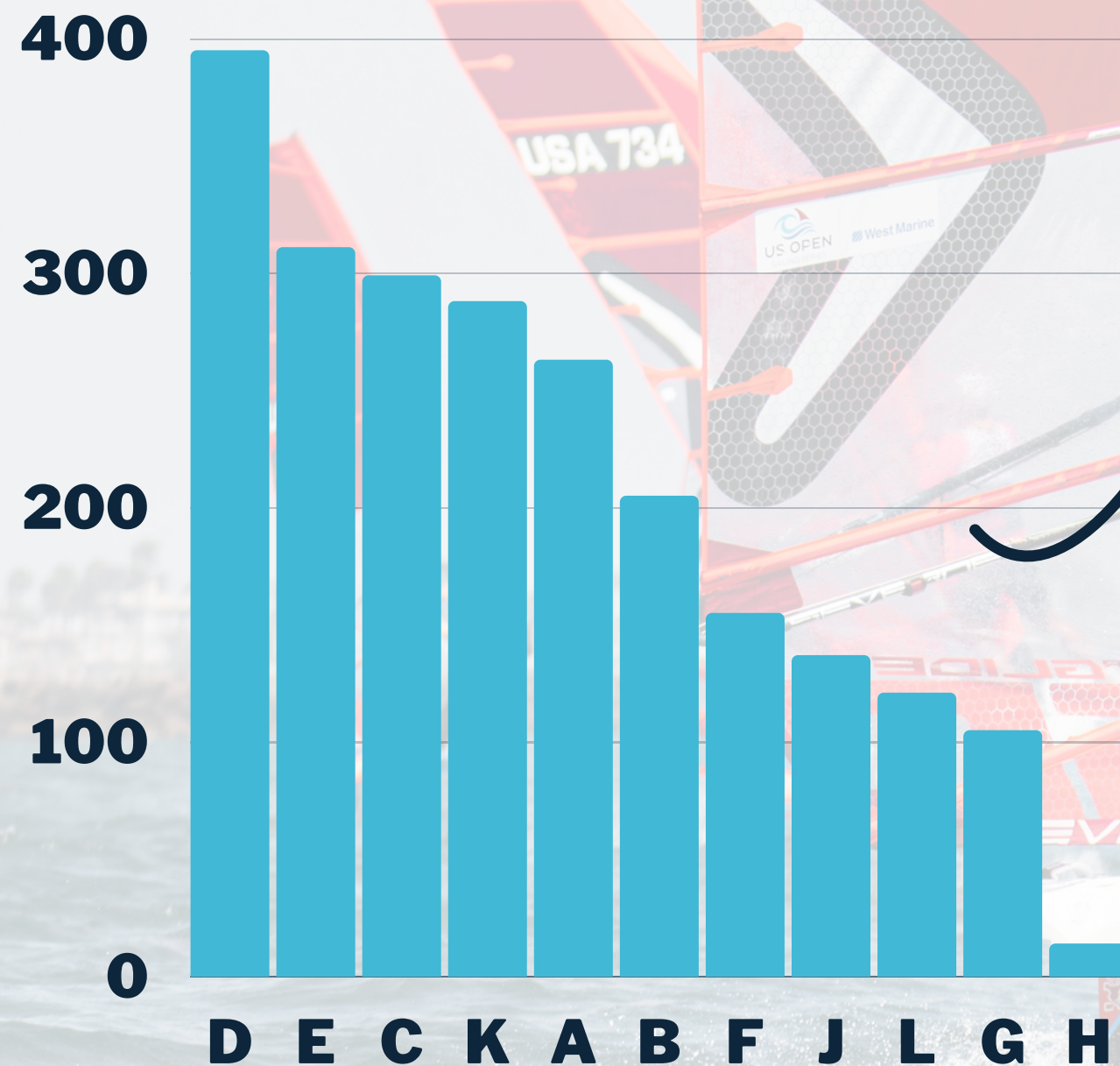
## Methodology

- Survey was open for 61 days (Oct. / Nov.)
- Asked Classes to distribute to members
- US Sailing – Weekly Lift & Quarter Deck
- O.D. Leadership Forum Facebook page
- Scuttlebutt Sailing News
- Participants @ US Sailing Championship Events



# Regional Representation

In what region do you typically sail?  
We are looking for your "home"  
region, not one you may travel to  
for a big event.





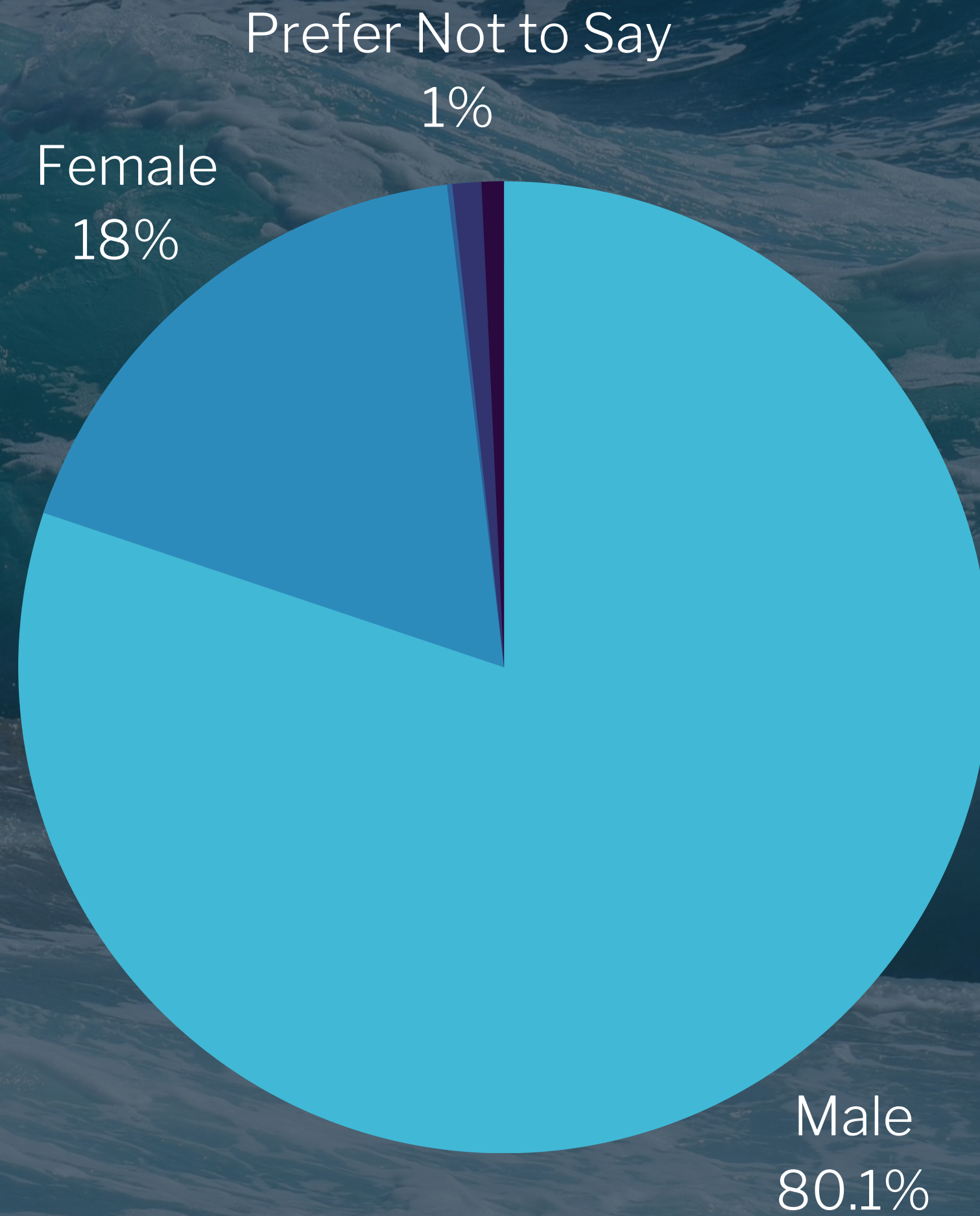
## Developing a Profile – Who

First a look at where the responses came from

- Just spell DECK
  - Southeast, Mid Atlantic, Rust Belt and the North Central states
  - New England and New York follow those 5.
  - Very few from the western ½ of the US



# Gender of Survey Participants



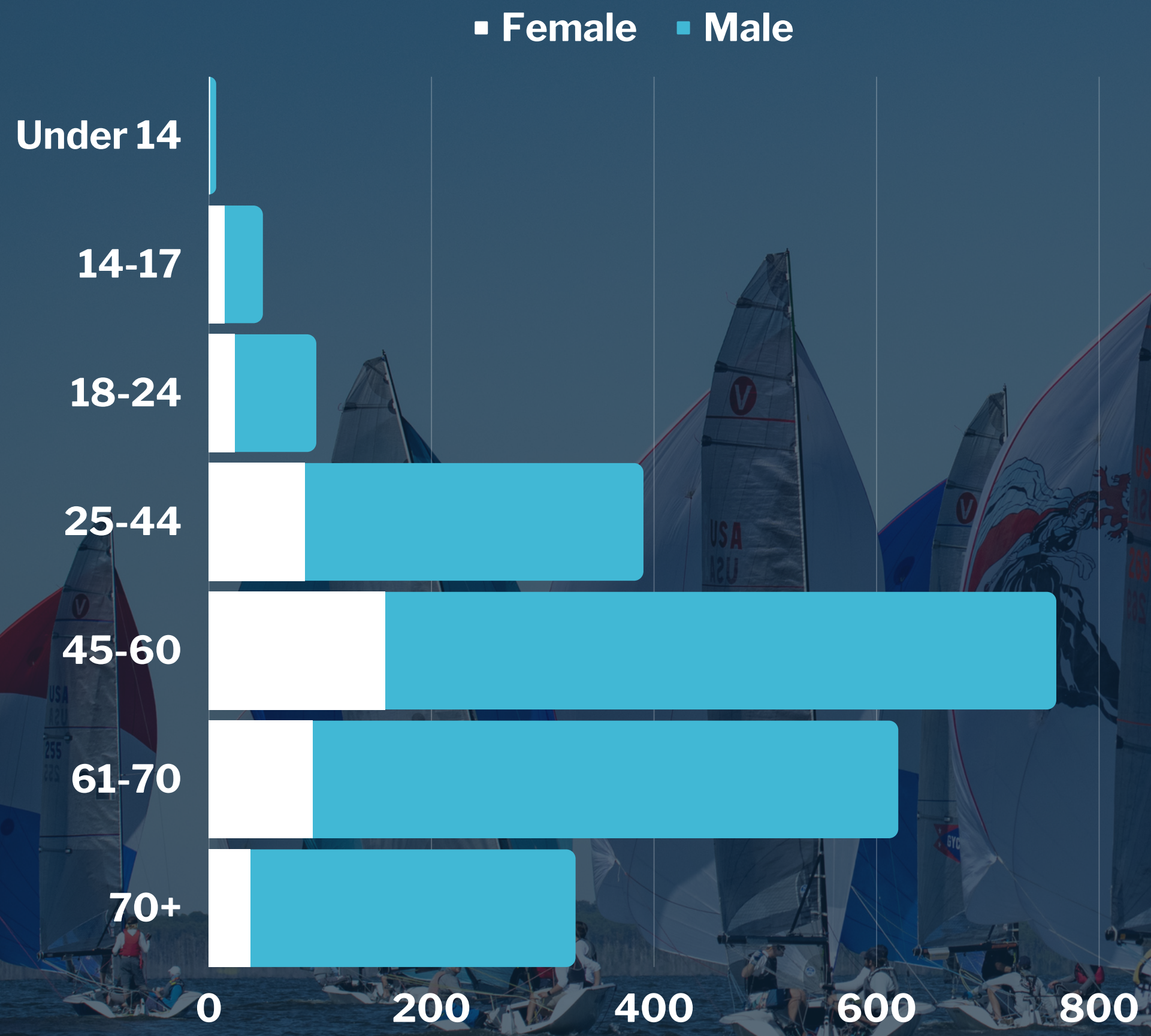


## Gender

Very much a male audience

- 80% Male
- 18% Female
- 2% No Answer
- “Other” data was sarcastic comments





## Most respondents were men age 45-60

- Over 61% of the respondents are between 45 and 70 years old
- Less than 7% are under 24 years old



## AGE Profile

- We have an aging audience
  - 61 % are 45 to 61 years old
  - Less than 7% are under 24 years old

### **Background / age began to sail**

- Majority of people regardless of age started to sail at a young age
- Just under 70% began sailing at 15 years old or less

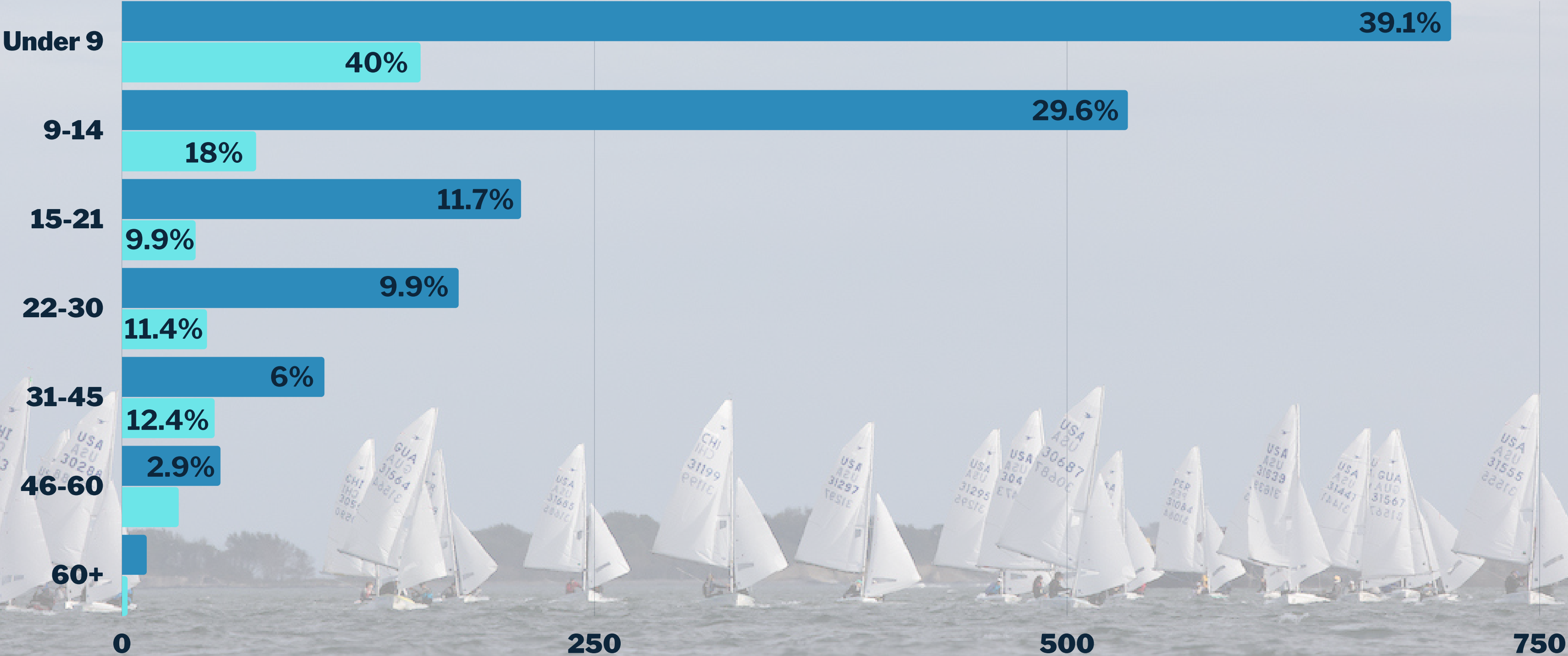


- Less than 3% began to sail in the retirement bracket
- Note a small uptick in # of woman learning in Midlife
- Small increase in % for the over 70's that started sailing early



# Over 77% of respondents began sailing at an age of 21 yrs. old or less

■ Male ■ Female





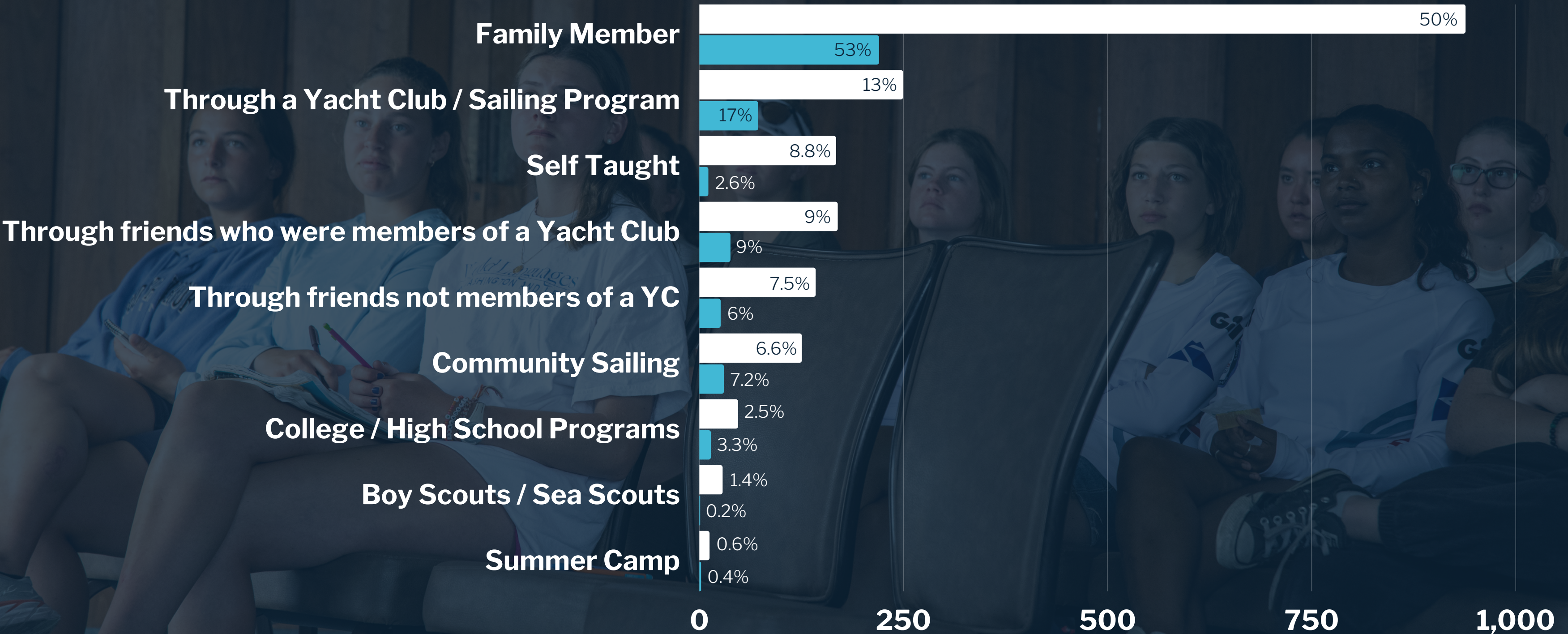
## **How were you Introduced to sailing?**

- More than 50% by a family member
- Less than 9% were self-taught or thru friends
- Less than 95 through a structured program



# Most respondents were introduced to sailing through family members

■ Male ■ Female





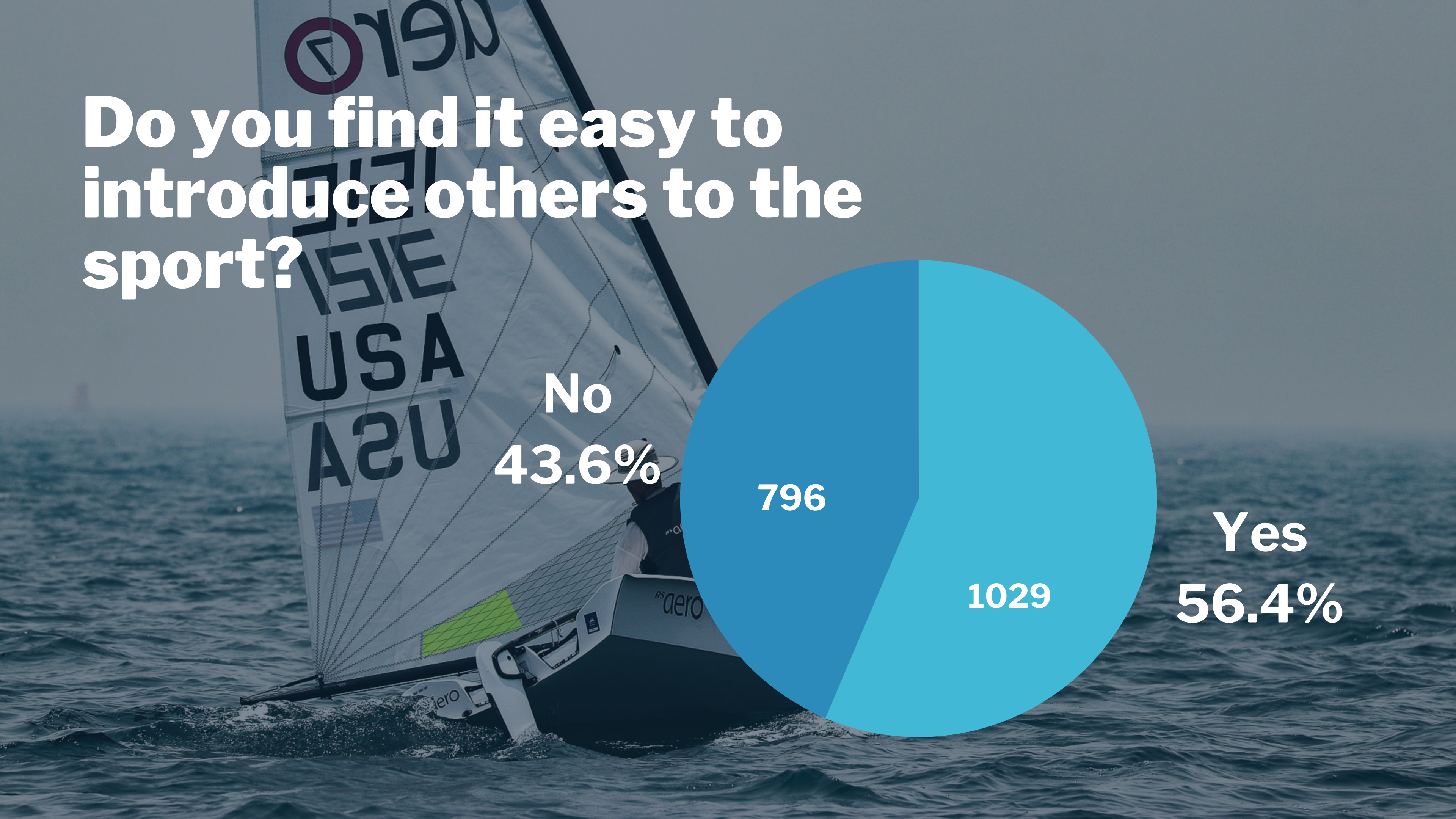
# Do you find it easy to introduce others to the sport?

No  
43.6%

796

1029

Yes  
56.4%





## **Is it Easy to Introduce new people to sailing?**

56% - Yes

44% - No

This may be why the % was so low in the previous question of those introduced to the sport through a friend.

We need to assess / work on this perception!



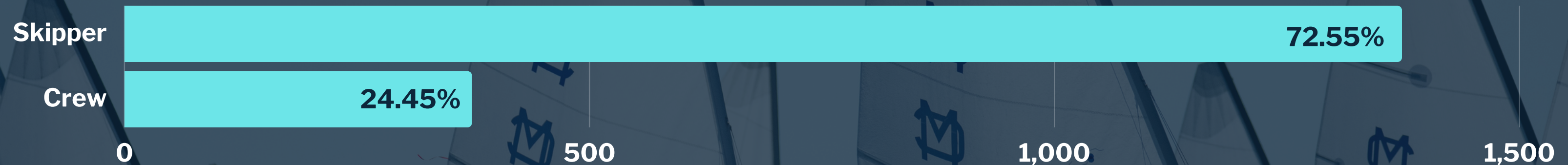
## Do you race?



## Do you own the boat you race?



## Do you skipper or crew?





## **Behaviors / Characteristics**

- 95% - Race
- 79% - Own there on boat
- 73% - are the Skipper
- 24% - are the crew

The survey is influenced by a selection bias towards those sailing that race

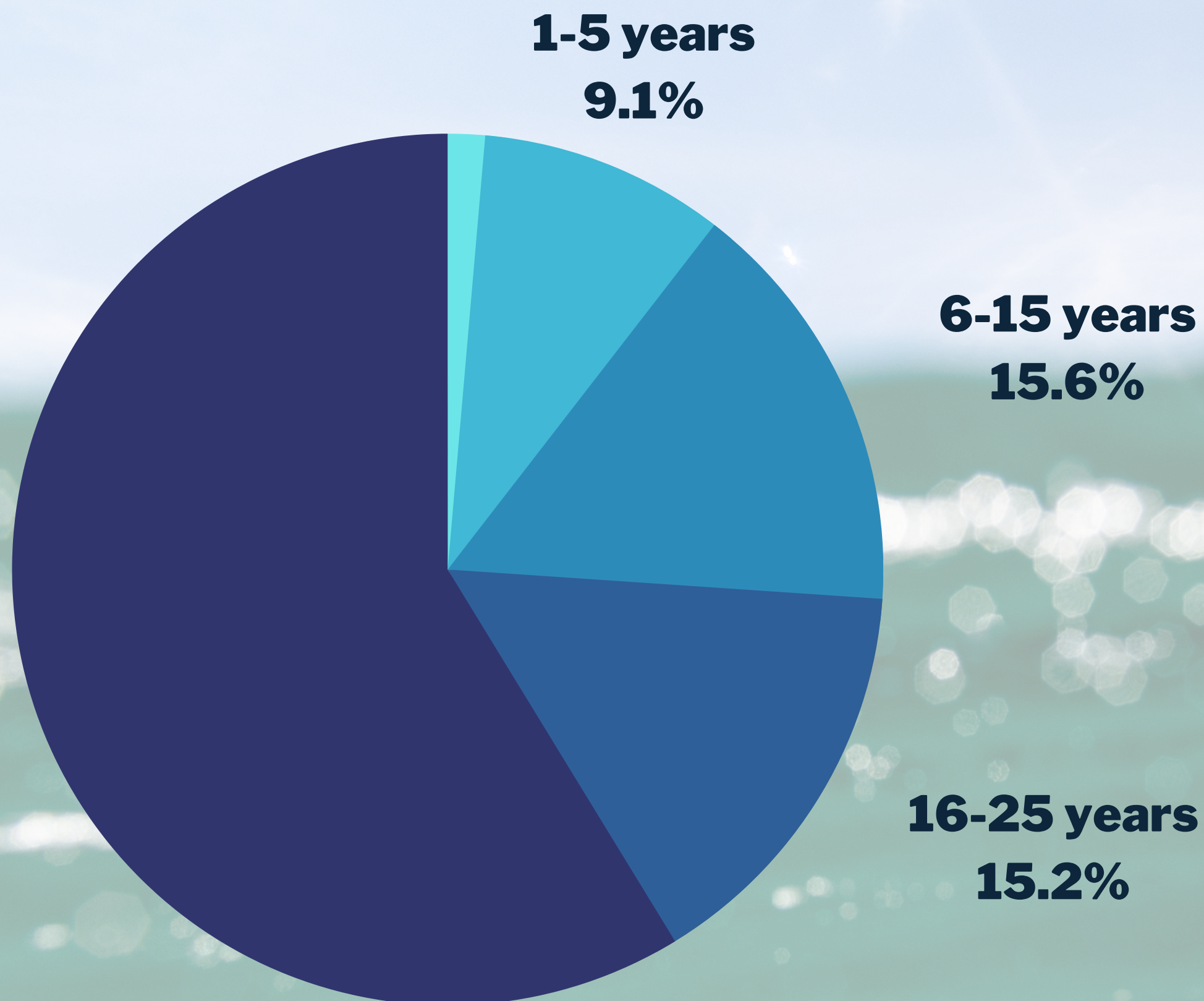


**ILCA**

**420812**  
**420024**

# How long have you been racing?

More than half of the respondents have been sailing for 25 plus years





## **How Long have you been racing?**

- 74% - For over 16 years and 59% for over 25 years!
- 16% for 6 to 15 years
- 9% for 1 to 5 years
- Strong correlation to the question “how long have you sailed”



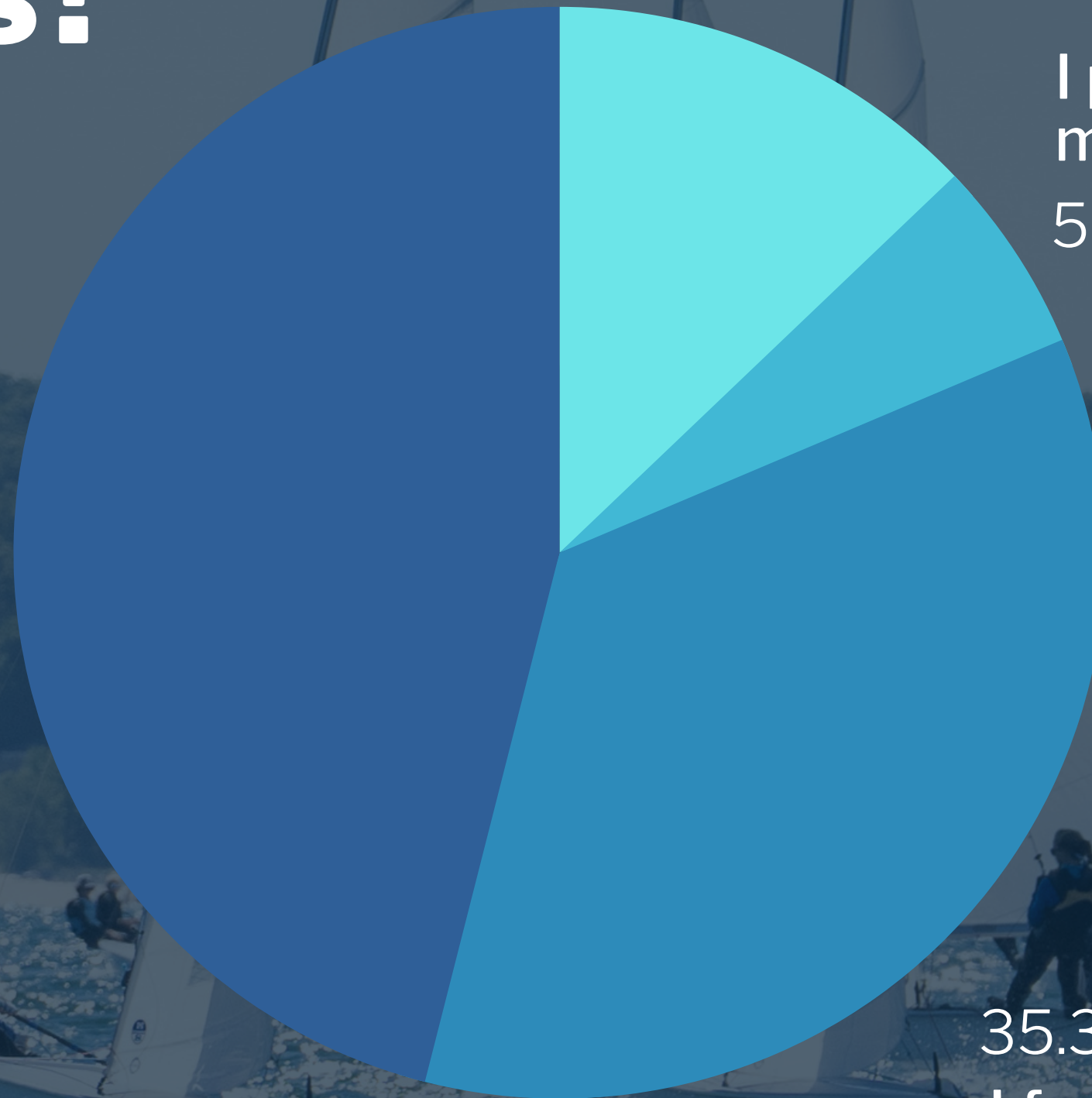
# Do you travel for sailing events?

I rarely travel outside my region to race  
46%

I never travel outside my region to race  
12.9%

I primarily travel outside my region to race  
5.7%

35.3%  
I frequently travel outside by region to race



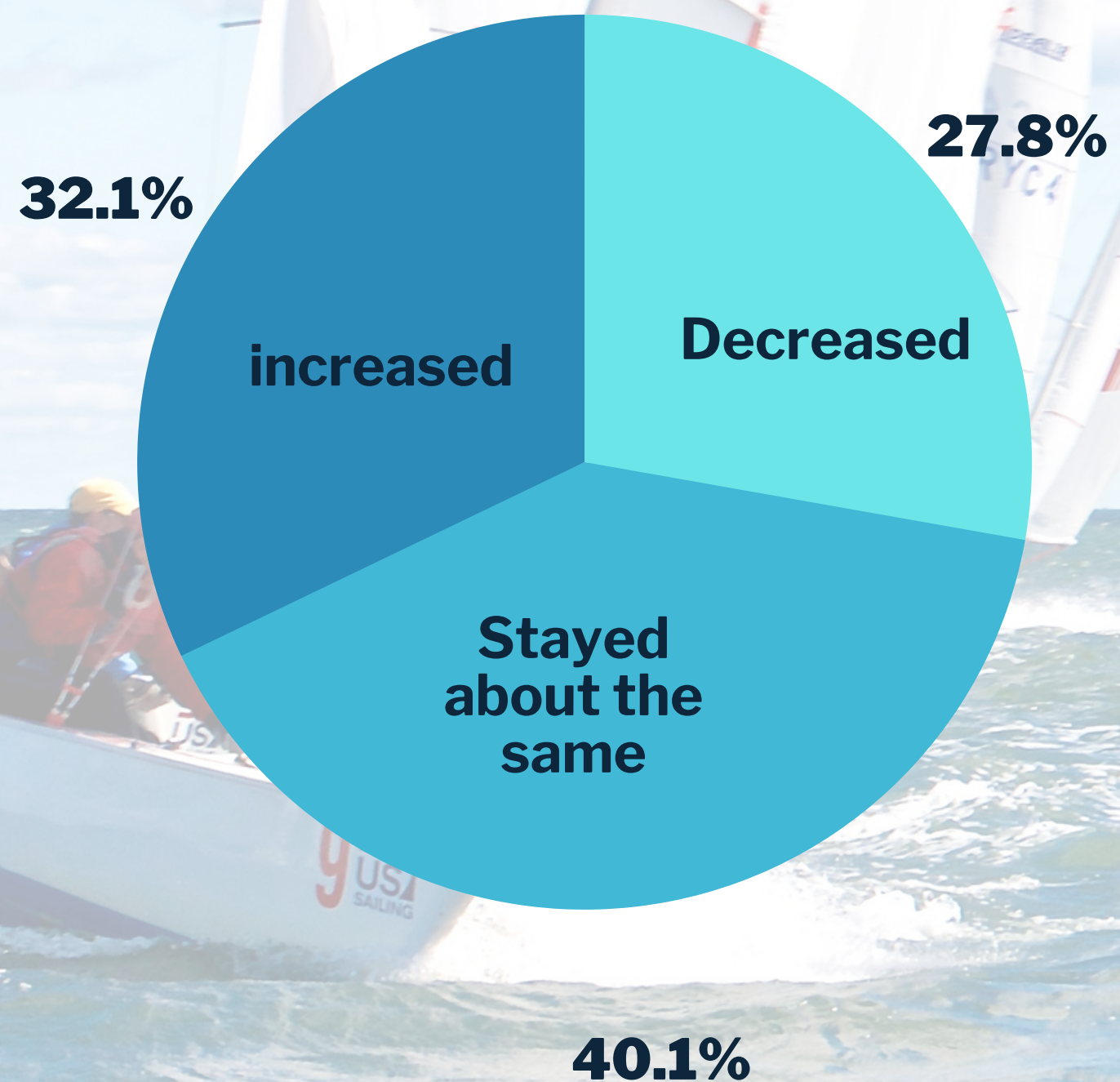


## **Do you travel for sailing events?**

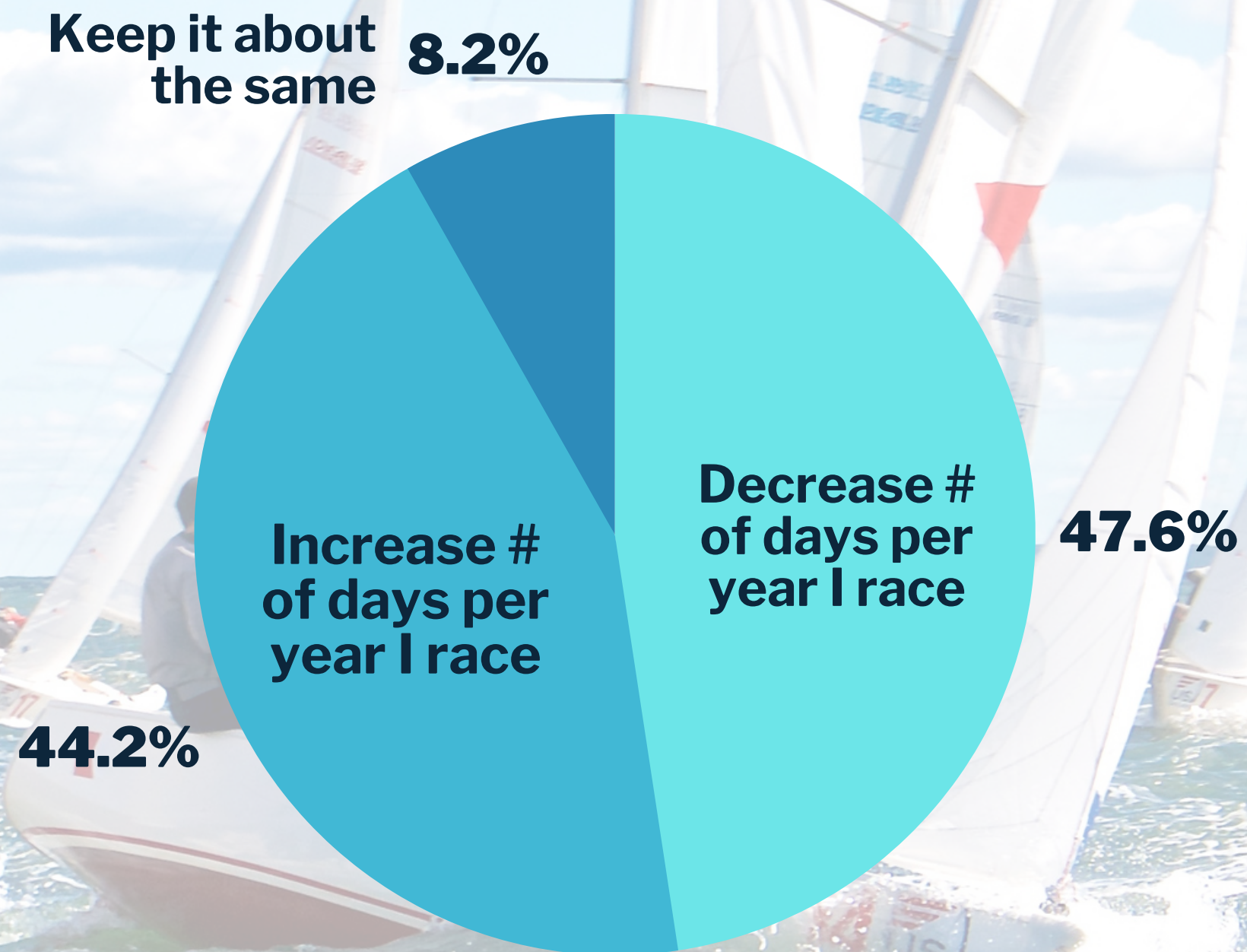
- 87% of the responses indicated they do travel events
- 41% Frequently or Primarily Travel
- 59% Rarely or never travel outside their region to events
- 13% do not



**In the last two years, which best describes the number of days you raced?**



**In the next two years, which best describes the number of days you plan to race?**





## # Of Days Raced in past 2 Years and plan to Race

### PAST

32%

40%

28%

Increased

Stayed the Same

Decreased

### FUTURE

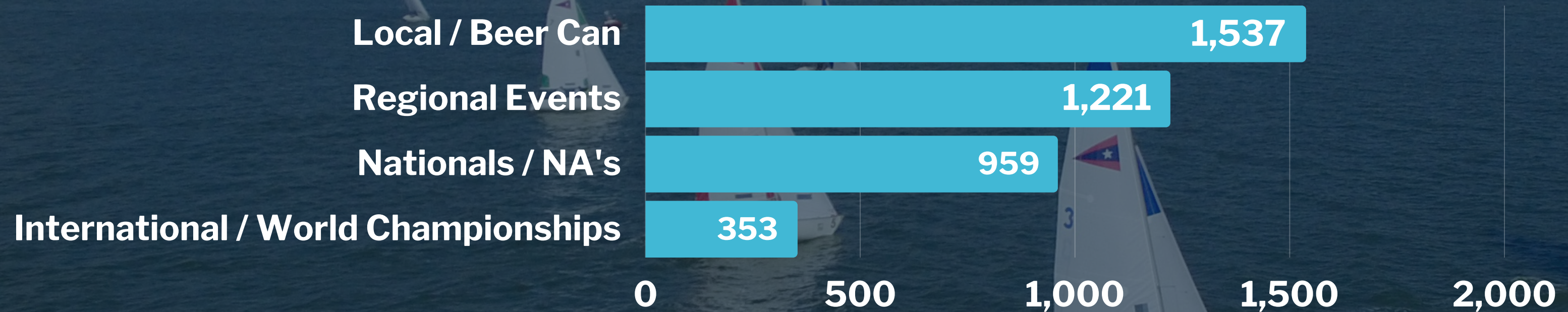
44%

8%

48%



# A large majority of respondents participated in Local / "Beer Can" racing



"Local sailing where I live is quite competitive, but I think that can make it fun. Having lots of learning opportunities and adult programing helps a ton."

Note that respondents answered multiple categories



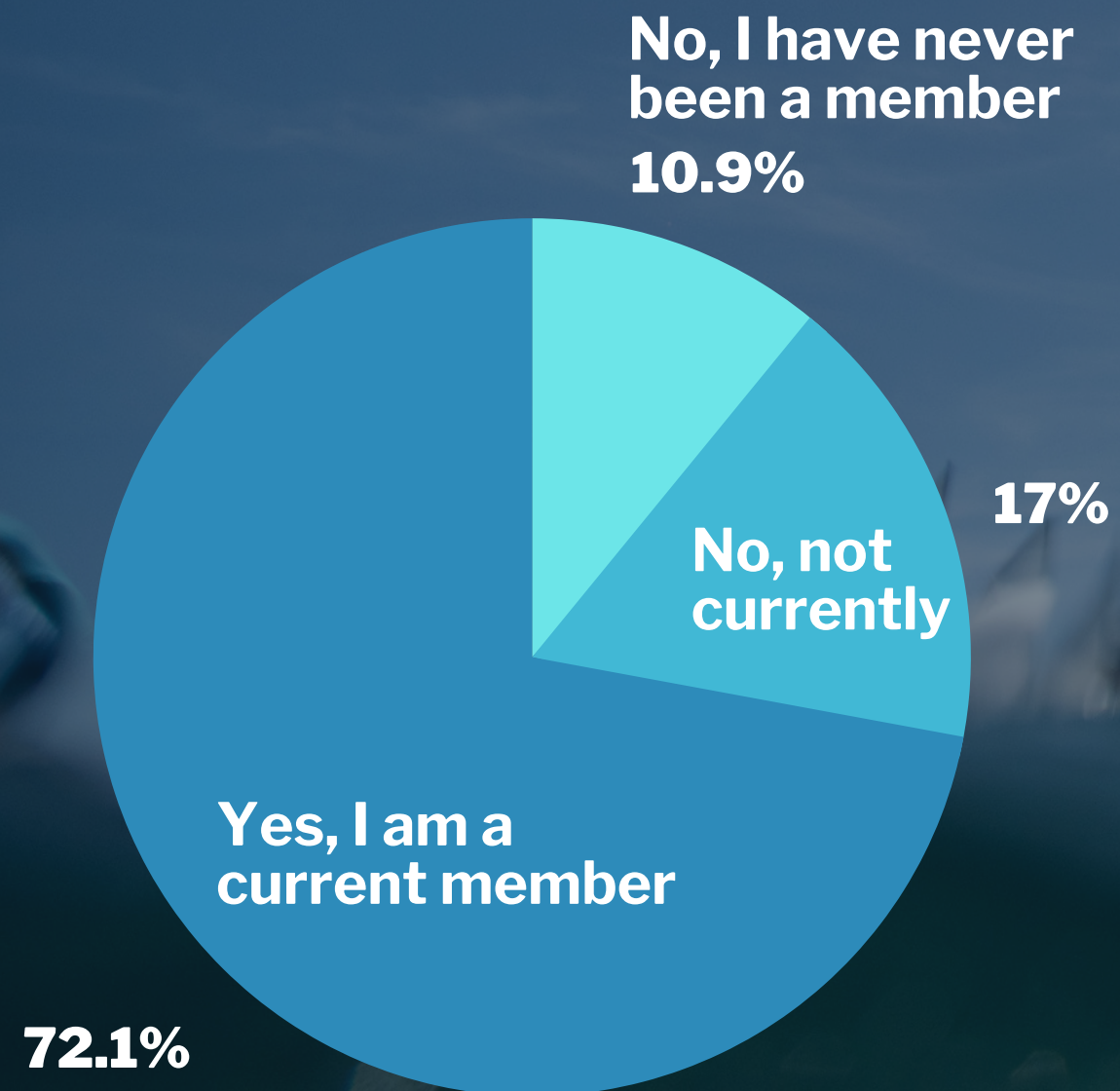
## Race Participation

- Local / Beer Can 38%
- Regional Regatta 30%
- NA's or National 24%
- World Championships 8%

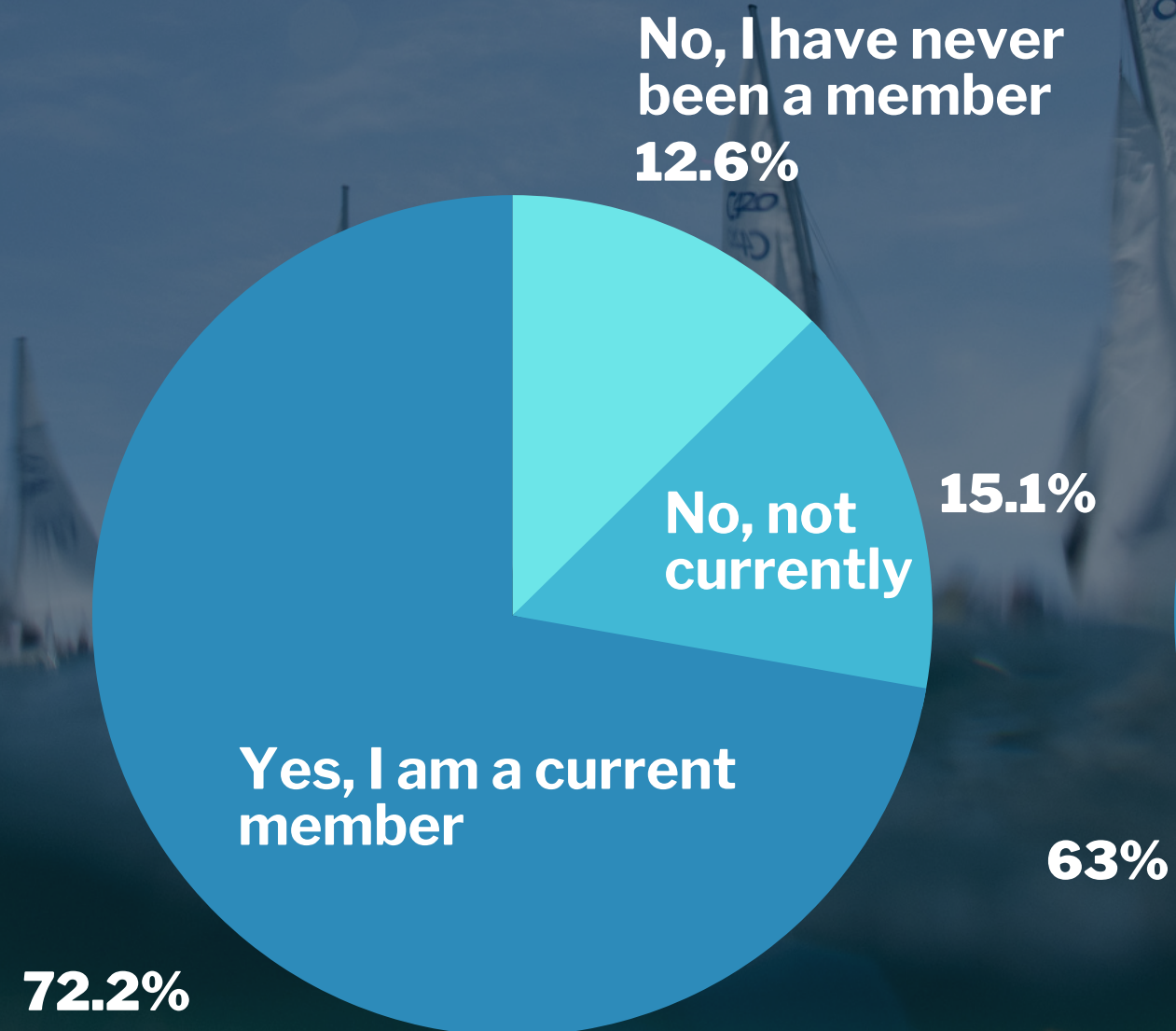


# Memberships

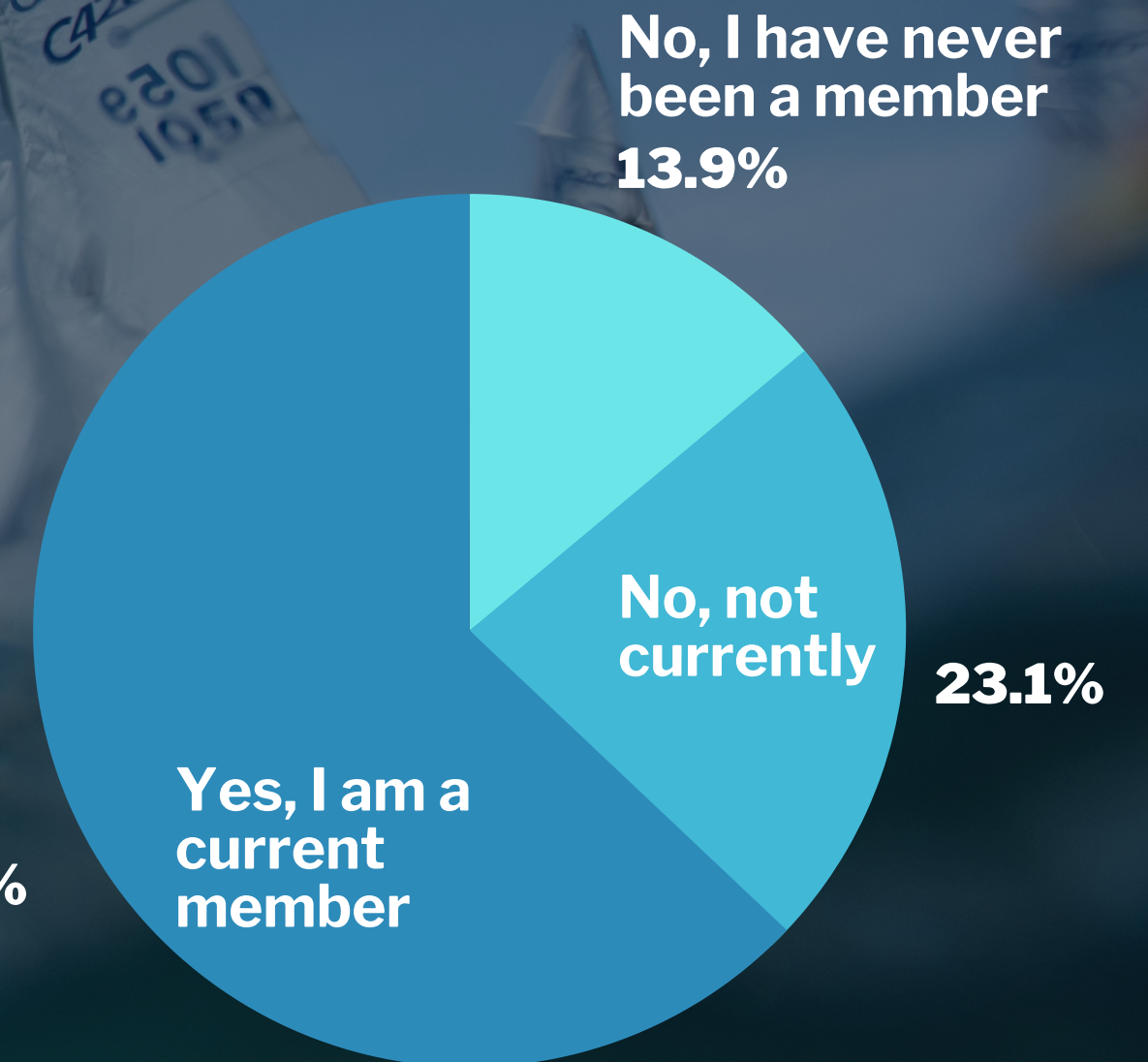
## One Design Class Assc.



## Your Local Fleet



## US Sailing





## Sailing Memberships

	<b><i>Yes</i></b>	<b><i>Not Now</i></b>	<b><i>Never</i></b>
• Local Fleet	72%	15%	13%
• One Design Class	72%	17%	11%
• US Sailing	63%	23%	14%

*US Sailing Change -9%.*                      *-6%*    *-3%*





# **Factors that encourage participation**

- 1. For the competition**
- 2. Want to improve sailing skills**
- 3. Social activities**
- 4. Boat tinkering**
- 5. Spending time with family**



## ***Perceptions – Factors that Encourage Participation***

*Ranking from a list of 12 – top 5*

- 1. For the competition** *(1 & 2 tied)*
- 2. To Improve Skills**
- 3. Social Activities** *(very close 3<sup>rd</sup>)*
- 4. Tinker with boat**
- 5. Time with Family**



The background of the slide is a photograph of ocean waves, showing white foam and blue-green water. The text is overlaid on the left side of this image.

**Top five barriers to participation in one design racing, ranked by survey participants from a list of 12 options**

- 1. Not enough time**
- 2. Other (see next slide)**
- 3. No boat to sail on**
- 4. Not fun anymore**
- 5. No crew**



## ***Perceptions – Factors that are Barriers to Participation***

1. Not enough Time
2. OTHER (*listed on next slide*)
3. No boat to Sail (*recall 21% indicated they did not own the boat they race*)
4. Not Fun anymore
5. No Crew



## **"Other" responses included...**


- **Weak fleet participation**
- **Family obligations, namely childcare**
- **Aging, medical problems or disability**
- **Disorganized yacht club / RC**



## **“OTHER” Factors that are Barriers to Participation**

1. Weak Fleet
2. Family Obligations / Childcare
3. Age / Medical issues
4. Disorganized YC or RC





**"Make it less expensive: work with clubs to offer basic affordable programs. Free, open house style sail boat rides, samplings of various experiences on different boats."**

"Regattas need to be more 'entry level friendly' by welcoming questions, offering easy explanation of rules, and encouraging participation."

"Advertise and promote Youth programs. Educate youth sailors on how to get started. Yacht clubs need to give scholarships or financial aid. Give kids without a lot of money an opportunity for competitive sailing not just learn to sail."

**"Crew match nights. Dock talks that are for everyone, not just skippers - training crew in actual races."**



**COMMENTS:** the most repeated were:

"Make it less expensive: work with clubs to offer basic affordable programs. Free, open house style sailboat rides, samplings of various experiences on different boats."

"Regattas need to be more 'entry level friendly' by welcoming questions, offering easy explanation of rules, and encouraging participation. Possibly have a Novice division?"



"Crew match nights. Dock talks that are for everyone, not just skippers - training crew in actual races"

"Advertise and promote Youth programs. Educate youth sailors on how to get started. Yacht clubs need to give scholarships or financial aid. Give kids without a lot of money an opportunity for competitive sailing not just learn to sail."



# Outcomes

- The age profile is concerning
- The gender and age profile makes diversity a huge goal / need
- Entice youth, collegiate and mid-lifers back to sailing
- Youth (18 – 26) were not a large participant of responses
- Need to survey Youth (18 – 26) to develop a data point
- Competition is very important as are social activities
- Sailing needs to fun!
- Need to repeat the survey every 2 years to develop trends





## **OUTCOMES – what did we learn:**

- The age profile is concerning
- The gender and age profile makes diversity a huge goal / need
- Entice youth, collegiate and mid-lifers back to sailing  
Youth (18 – 26) were not a large participant of responses
- Need to survey Younger sailors (18 – 26) to develop a data point



- Competition is very important as are social activities  
Sailing needs to fun!
- Need to repeat the survey every 2 years to develop trends



# One Design Sailing

*Class Association survey results  
50 respondents*





## **One Design Class Survey Notes**

- Over 140 One design Classes were contacted
- Sixty Classes took part in the survey
- 50 One design Classes completed the survey



# Methodology

To attain results for the Class Survey:

- Contacted all class leaders in the US Sailing contact list and emailed this group various times while the survey was open
- Promoted the survey US Sailing's publications the Weekly Lift and Quarterdeck
- Promoted the survey on the private One Design Leadership Forum Facebook page
- Promoted the survey on Scuttlebutt Sailing News
- Asked participants at US Sailing Championships to complete the survey
- Survey was open from October 6 to December 6, 2022

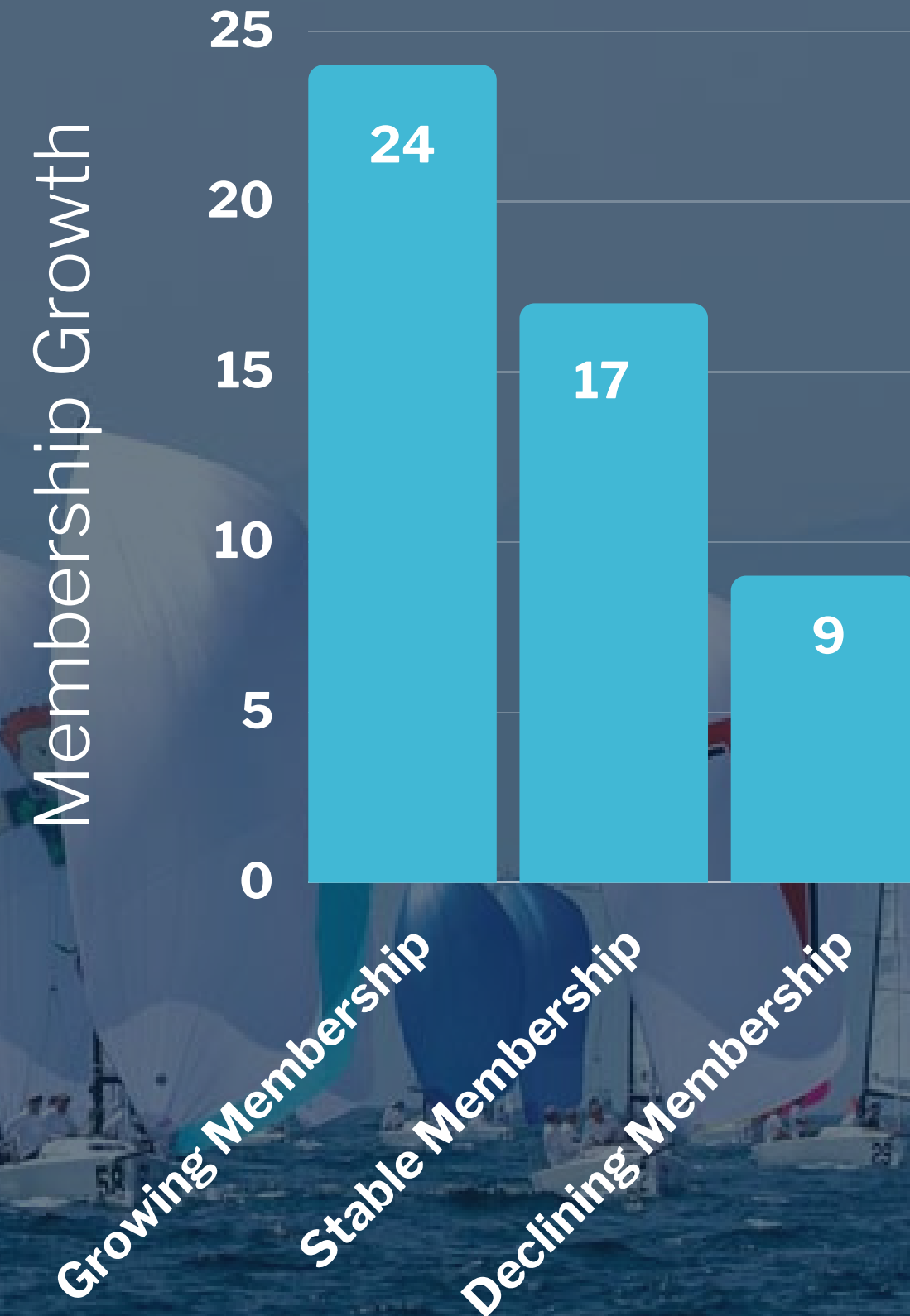
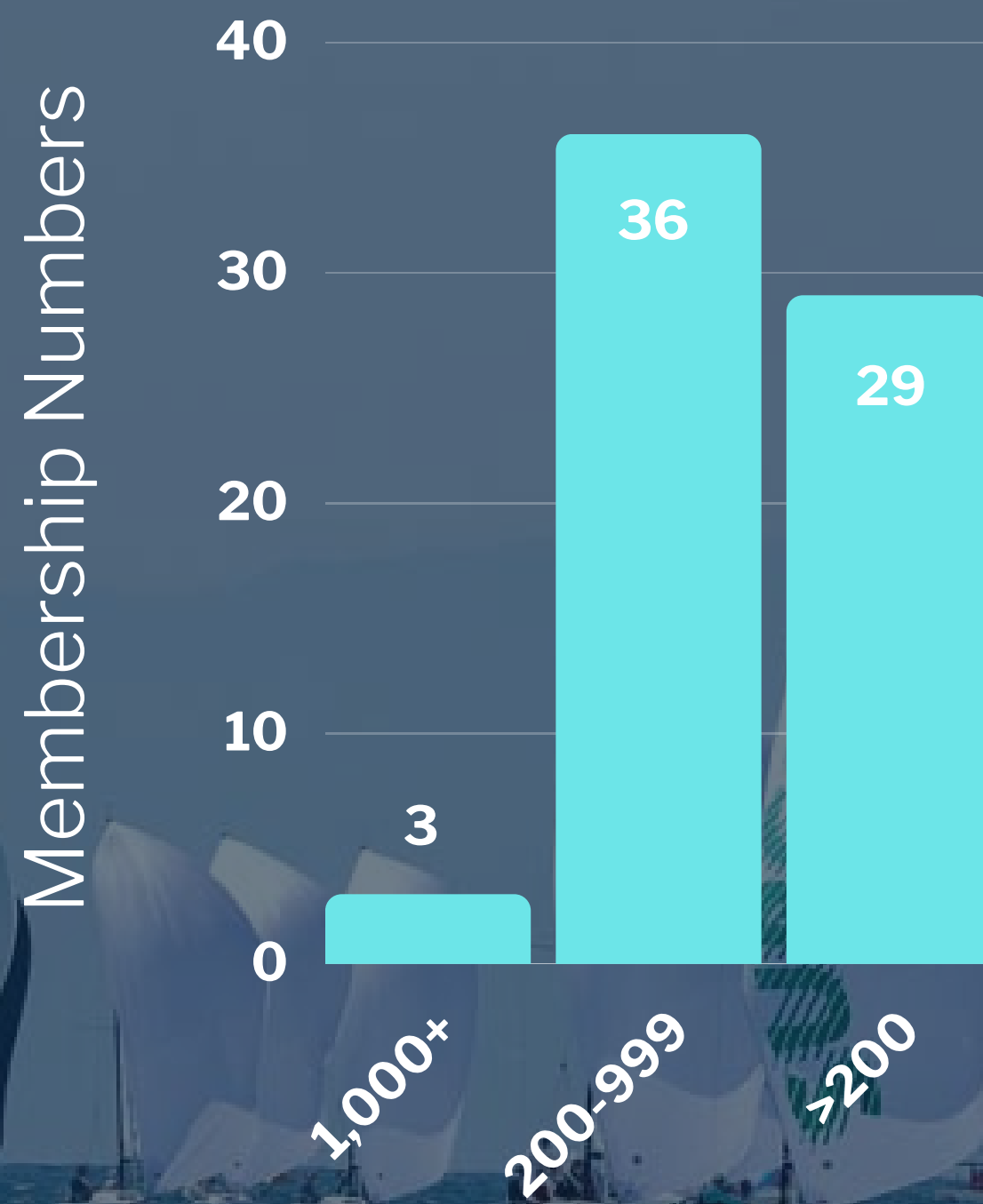


## Methodology

- As in the previous survey - surveys were available October 6, to December 6, 2022
- were promoted through: One design Class records at US Sailing
- US Sailing Weekly Lift & Quarterdeck publications
- One Design Leadership Forum Facebook Scuttlebutt Sailing News US Sailing Championships Even



# Of the 50 One Design Classes that completed the survey, membership data indicated:





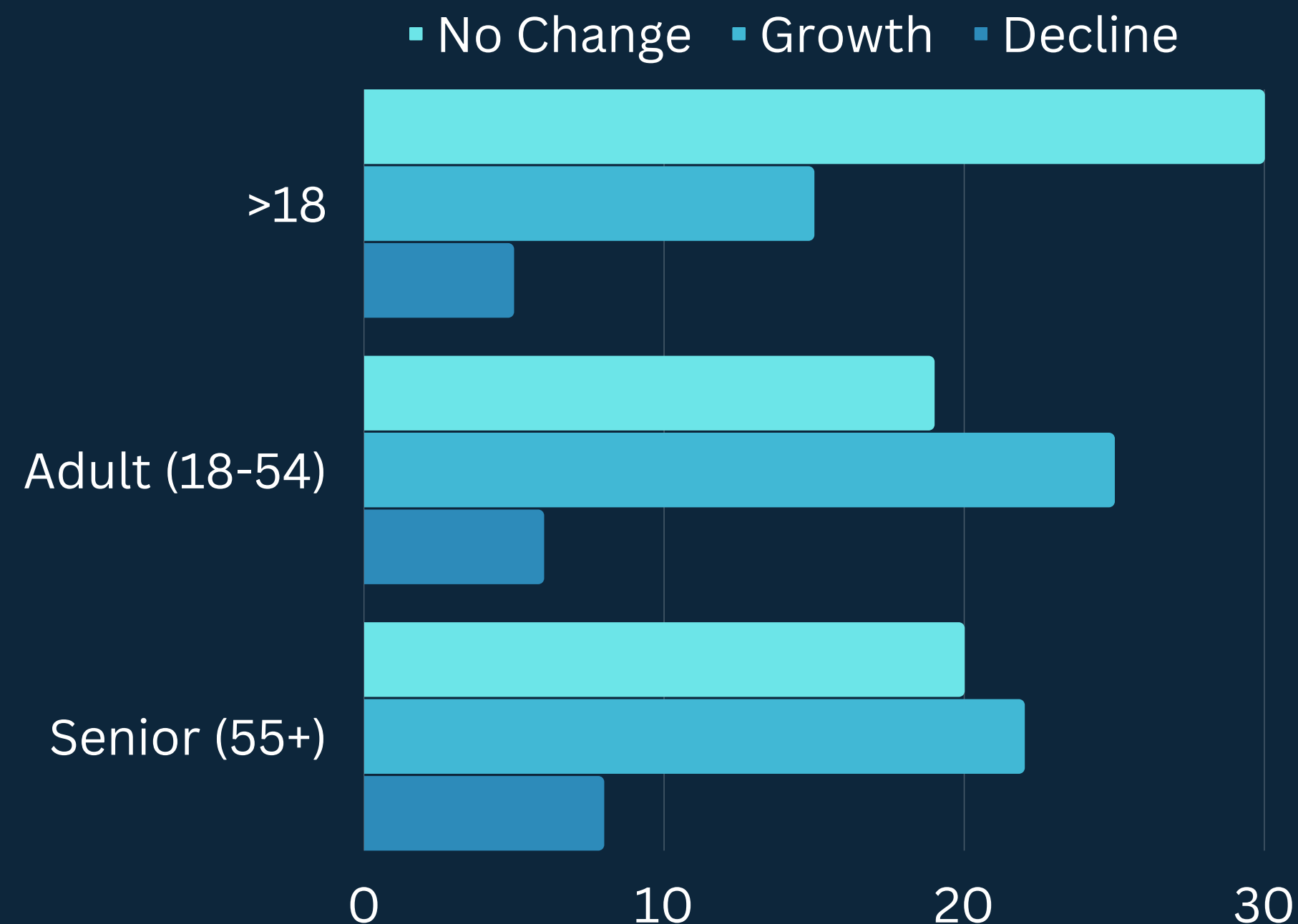
## **Memberships**

- 3 - Classes reported memberships over 1,000
- 36 – Classes memberships are in the 200 – 999
- 29 – Classes reported memberships less than 200
- 24 Classes reported that they were growing
- 17 classes indicated their #'s were stable
- 9 classes reported a decline in membership



**The largest growth was seen in the adult age group (18-54), while the largest decline was seen in the senior age group (55+)**

In the last 24 months, what is your class' trend in membership in three different age groups:





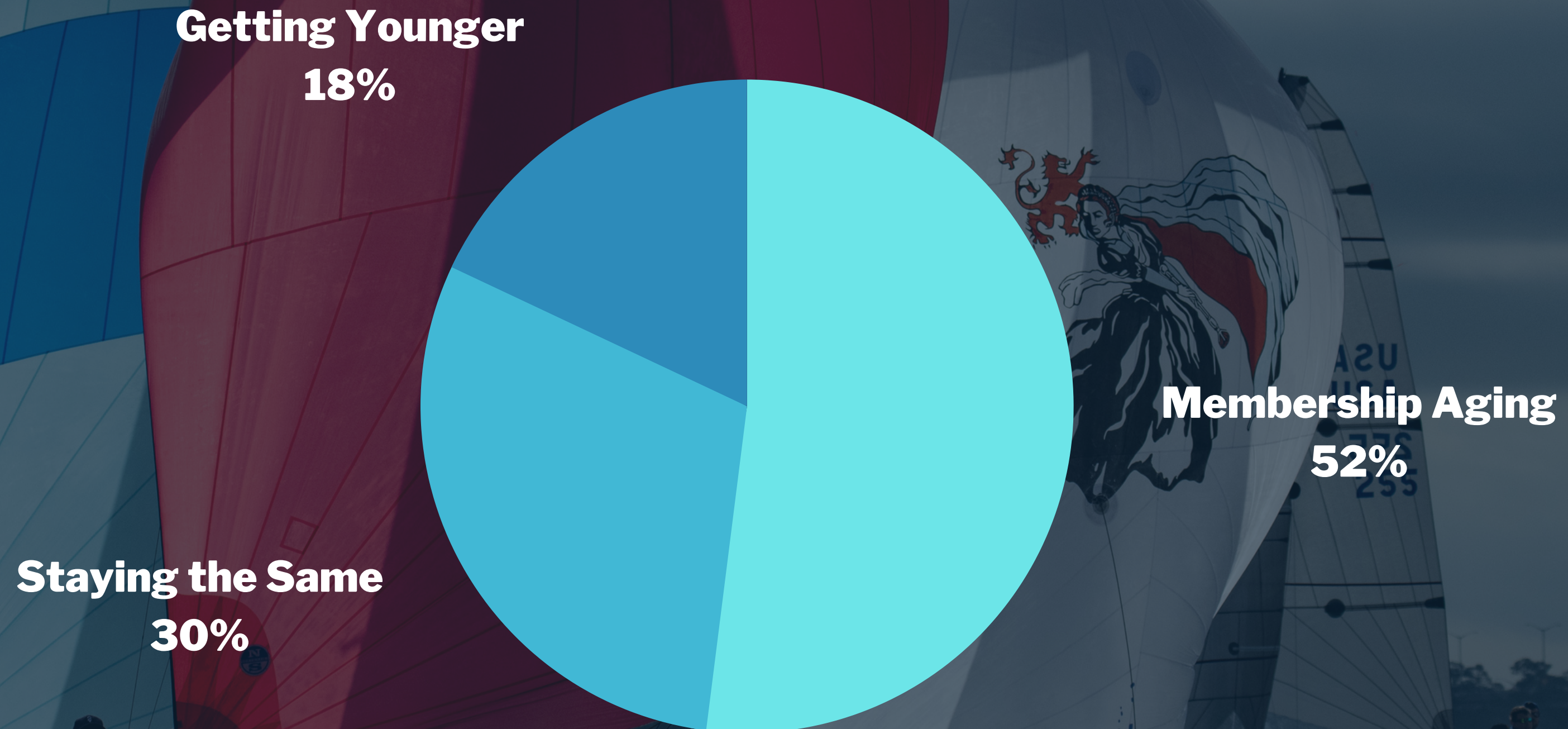
## **Age Profile**

Age profile is slightly different to what we found in the individual survey yet has a bias towards an older audience

- Largest population 18 – 54
- Next largest is the 55+
- Largest “no Change” is in the less than 18
- 13 Classes reported growth in the less than 18 yr. olds
- Biggest decline is 55+ which may reflect aging issues
- Note that only 24% of Classes track demographics



**24% of respondents track demographics data, while 76% do not. Of the of classes who do:**



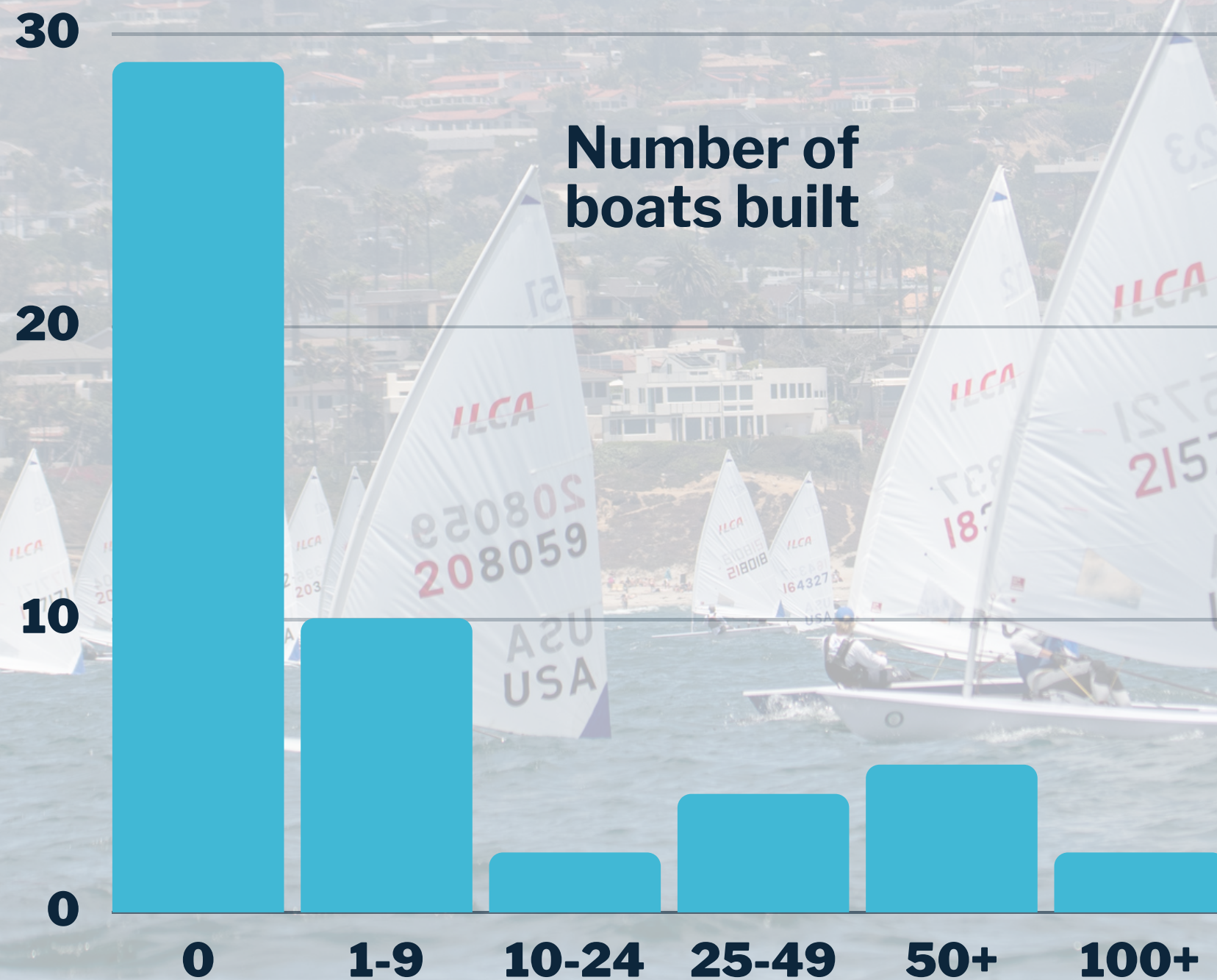


## **Age Trends**

- 52% of the Lasses reported their membership is aging
- 30% thought that the membership age was stable
- 18% indicated that their membership was getting younger



# Most of the One Design Classes reported new boats were built in the past two years.



## The used boat market was also active:

- 50% One Design Classes reported demand exceeded supply.
- 34% reported demand & supply are equal.
- 16% indicated supply is higher than demand.
- A total of 1,949 used boats changed hands in 37 One Design Classes.
- 5 Classes reported that 100 plus used boats changed hands in their respective classes.



## **New Boats Built**

- 29 Classes reported that no new boats were built in past 2 years
- 10 classes reported 1-9 boats were built
- 2 classes reported 10 – 24 boats being built
- 4 classes indicated 25 – 49
- 5 classes reported more than 50 and 2 classes indicated more than 100 boats built



## Used Boat Exchange

- A total of 1,949 used boats sold was reported in 37 classes
- 5 Classes reported more than 100 boats were exchanged
- 50% of the classes indicated demand exceeded supply
- 16% reported that supply exceeded demand



# Boat to Membership Ratio

Class	boats built	paid members	paid members / boats built
Star Class Int Yacht Racing Assn	8,582	1,365	15.9%
International Lightning Class Association	15,600	1,359	8.7%
AMYA Soling 1 Meter RC	13,000	1,000	7.7%
Flying Scot Sailing Association	6,260	923	14.7%
Club 420 Class Association	9,200	788	8.6%
United States Sunfish Class Association	750,000	650	0.1%
Thistle Class Association	4,053	645	15.9%
MC Sailing Association	2,890	631	21.8%
International Hobie Class Association	100,000	567	0.6%
Catalina 22 National Sailing Association	15,809	548	3.5%
Snipe Class International Racing Association	31,820	477	1.5%
Catalina 22 National Sailing Association	15,800	475	3.0%
National Class E Scow Association	300	364	121.3%
International Etchells Class	1,500	350	23.3%



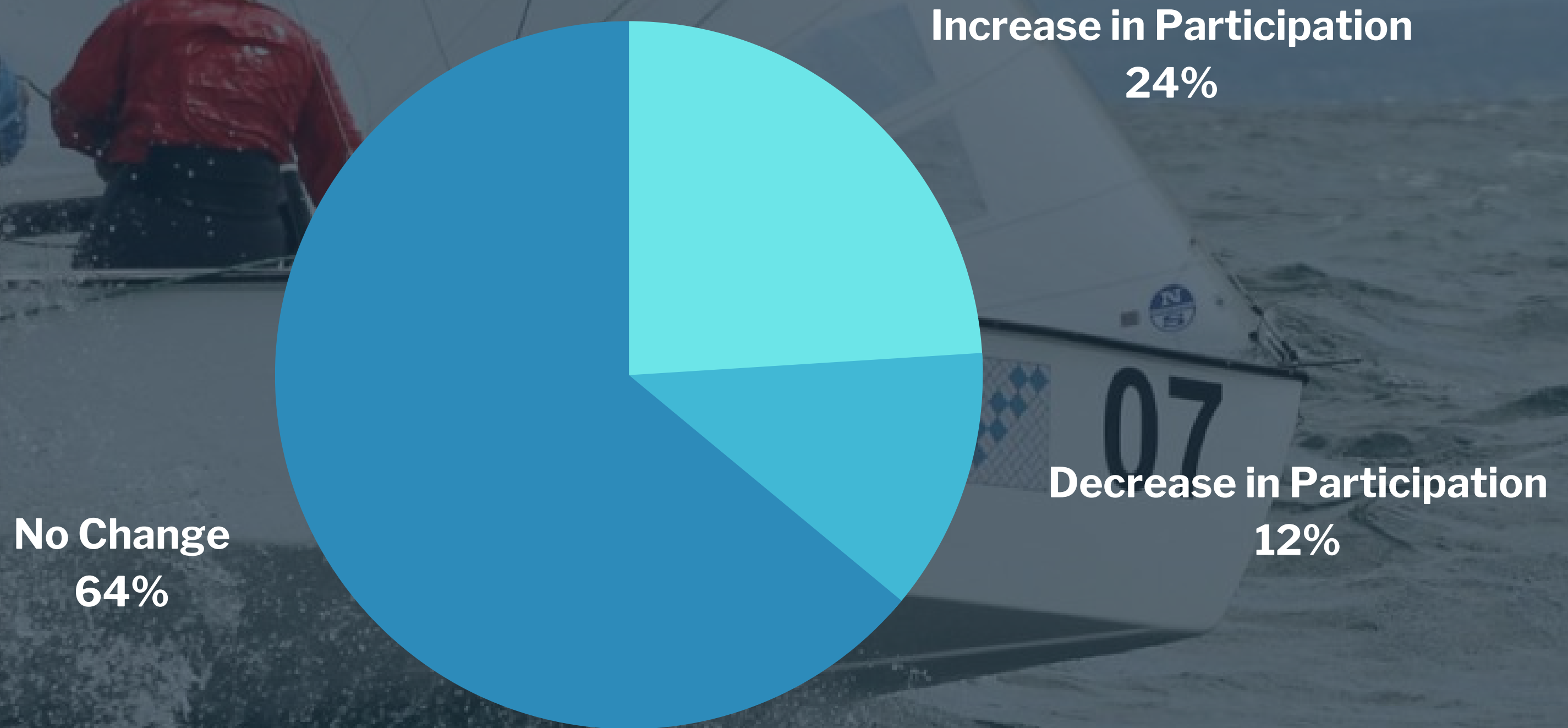
## Boats to Membership

Not all the classes reported both fields, those that did provide an interesting look at the total boats built adjacent with total paid membership.

- Sort is by memberships – large to small
- The ratio on right indicated what % membership is to total number of boats
- The longer the red bar that higher the %
- E-Scows have more members than boats built
- *Qualifier is that total boats built does not = the number of boats available*



# Classes reported participation at National Championships in the last 3 years:





## **Participation at N/A's or Nationals**

In the past three years Classes reported attendance

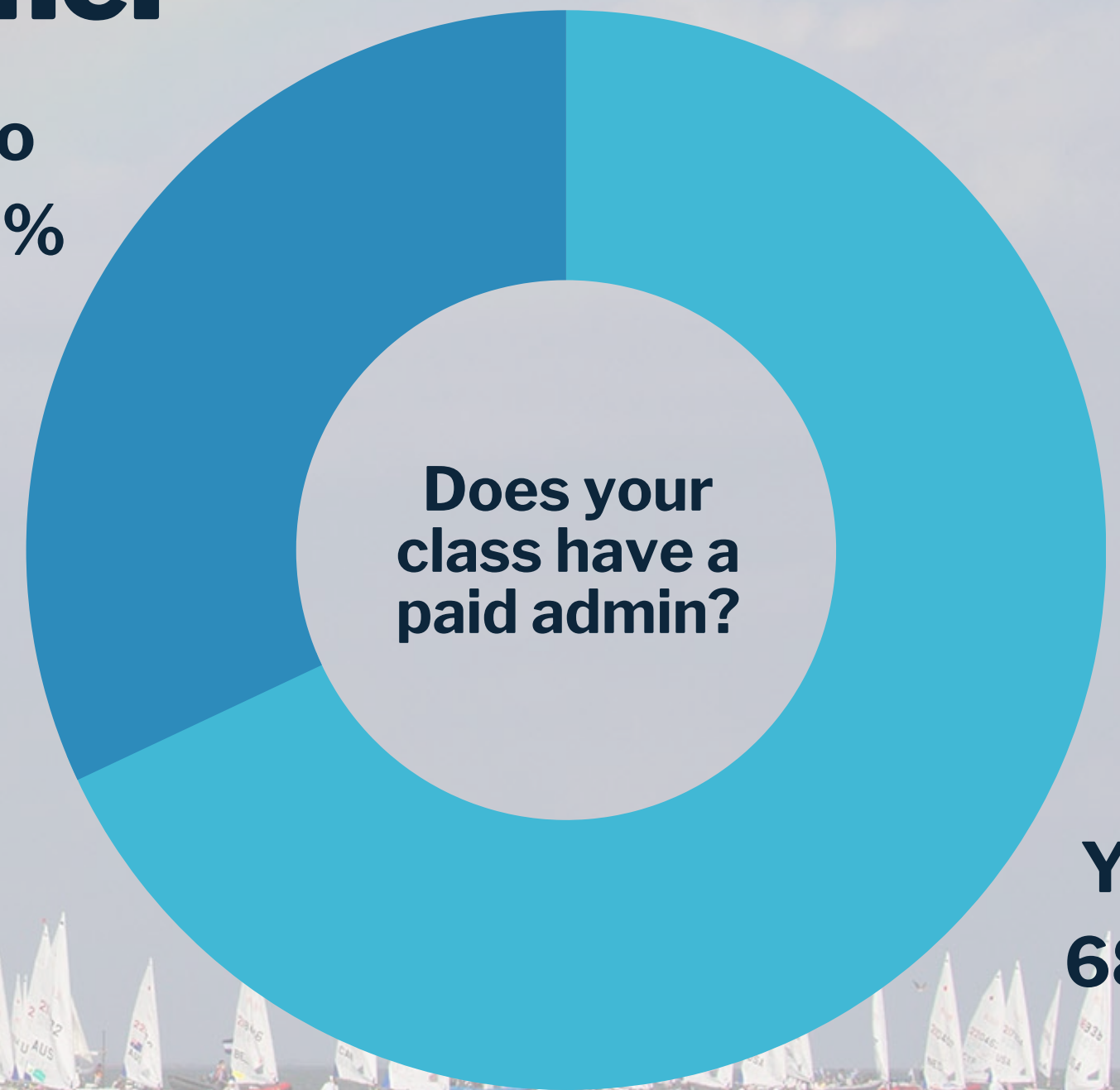
- Did not change – 64%
- Increased in participation – 24%
- 12% noted that there was a decrease



# Most classes have a paid class administrator, and a majority of paid class admin are part time.

73% of the classes reported that they have a form of charitable status while 27% do not

No  
32%



Yes  
68%

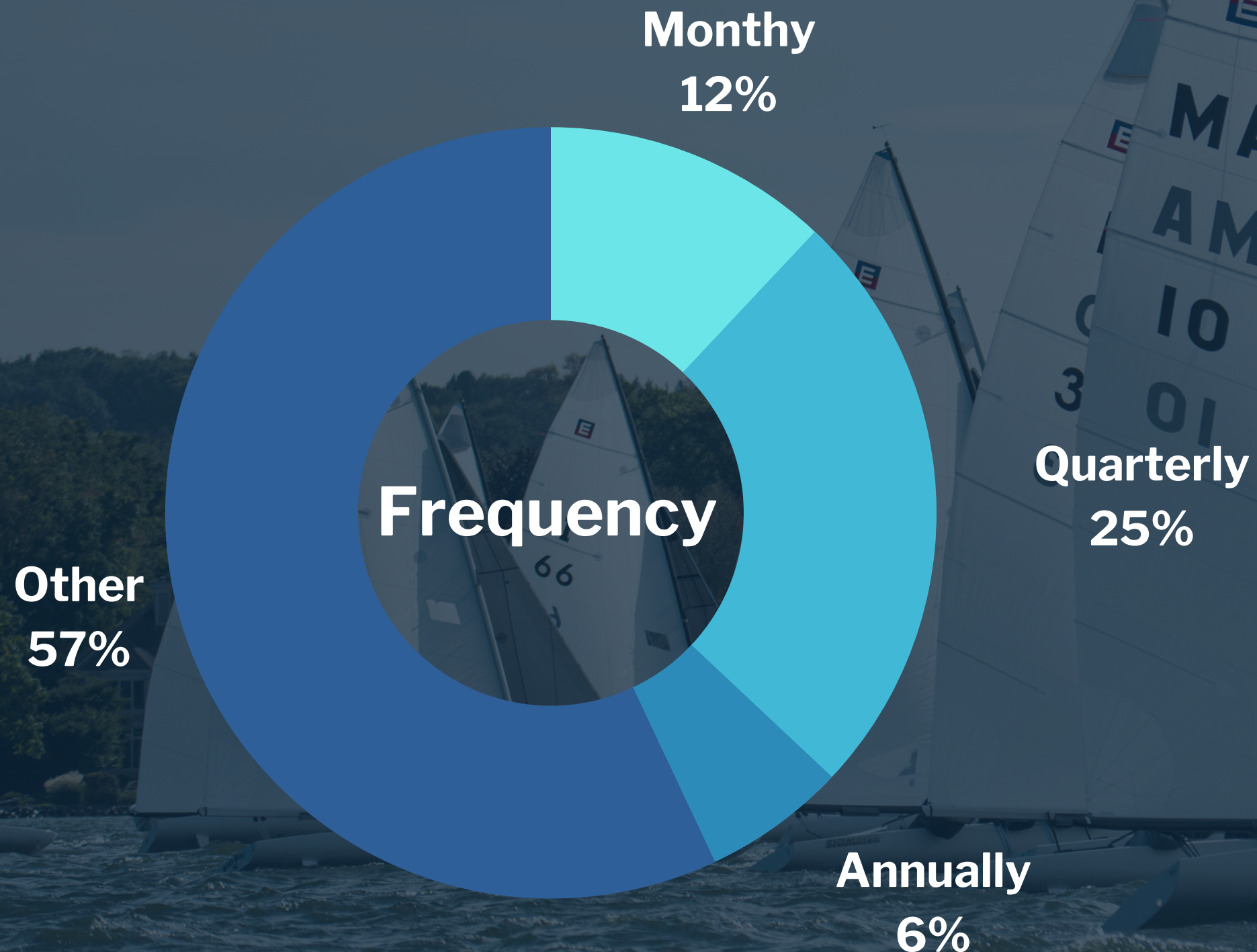


## **Class Administration**

- 68% of the classes have a part- or full-time administrator or class secretary
- 32% of the classes reported they do not
- 73% of the classes reported that they have a form of charitable status such as 501 3c while 27% do not



# A little more than half of classes have a newsletter, with a quarter publishing online.



## Newsletter

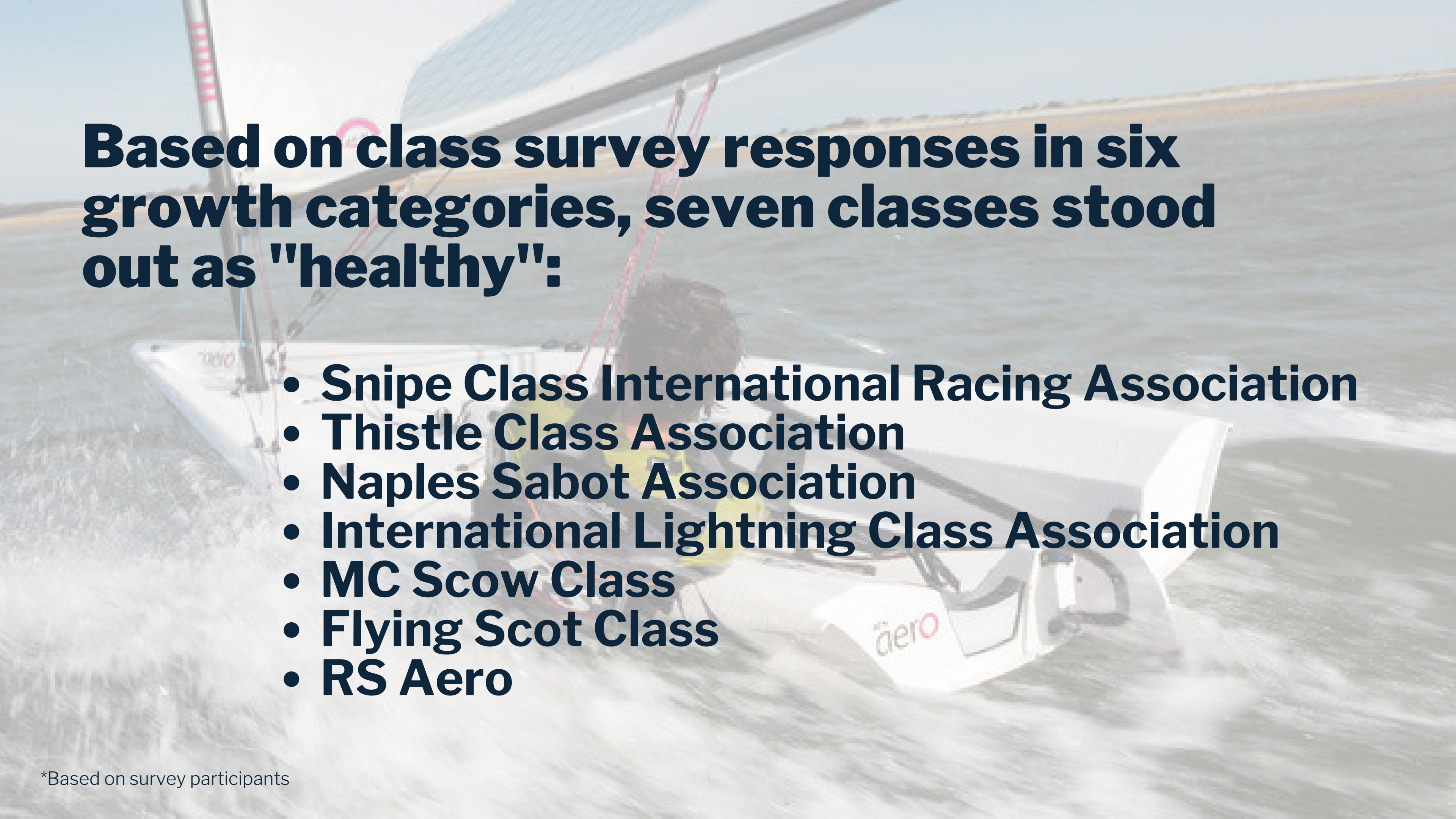
- When asked whether the class has a newsletter 51% indicated “yes” and 49% do not.
- Over 75% indicated that newsletter is transmitted in an electronic format, 22% indicated both electronic and print while 2% only in print.
- Other may include seasonal or as needed.



## Newsletters

- 51% of the classes indicated that they have a newsletter
- 25% of those publish quarterly
- 12% publish monthly and 57% “other”
- 75% publish in an electronic format
- 22% use print and electronic formats





**Based on class survey responses in six growth categories, seven classes stood out as "healthy":**

- **Snipe Class International Racing Association**
- **Thistle Class Association**
- **Naples Sabot Association**
- **International Lightning Class Association**
- **MC Scow Class**
- **Flying Scot Class**
- **RS Aero**



## **Best of the Best**

The 50 one design completing the survey were assessed for “health” – Results for the classes that stood out:

- Snipe Class
- Thistle Class
- Naples Sabot
- Lightning Class
- MC Scow
- Flying Scot &
- RS Aero



# **Categories measured:**

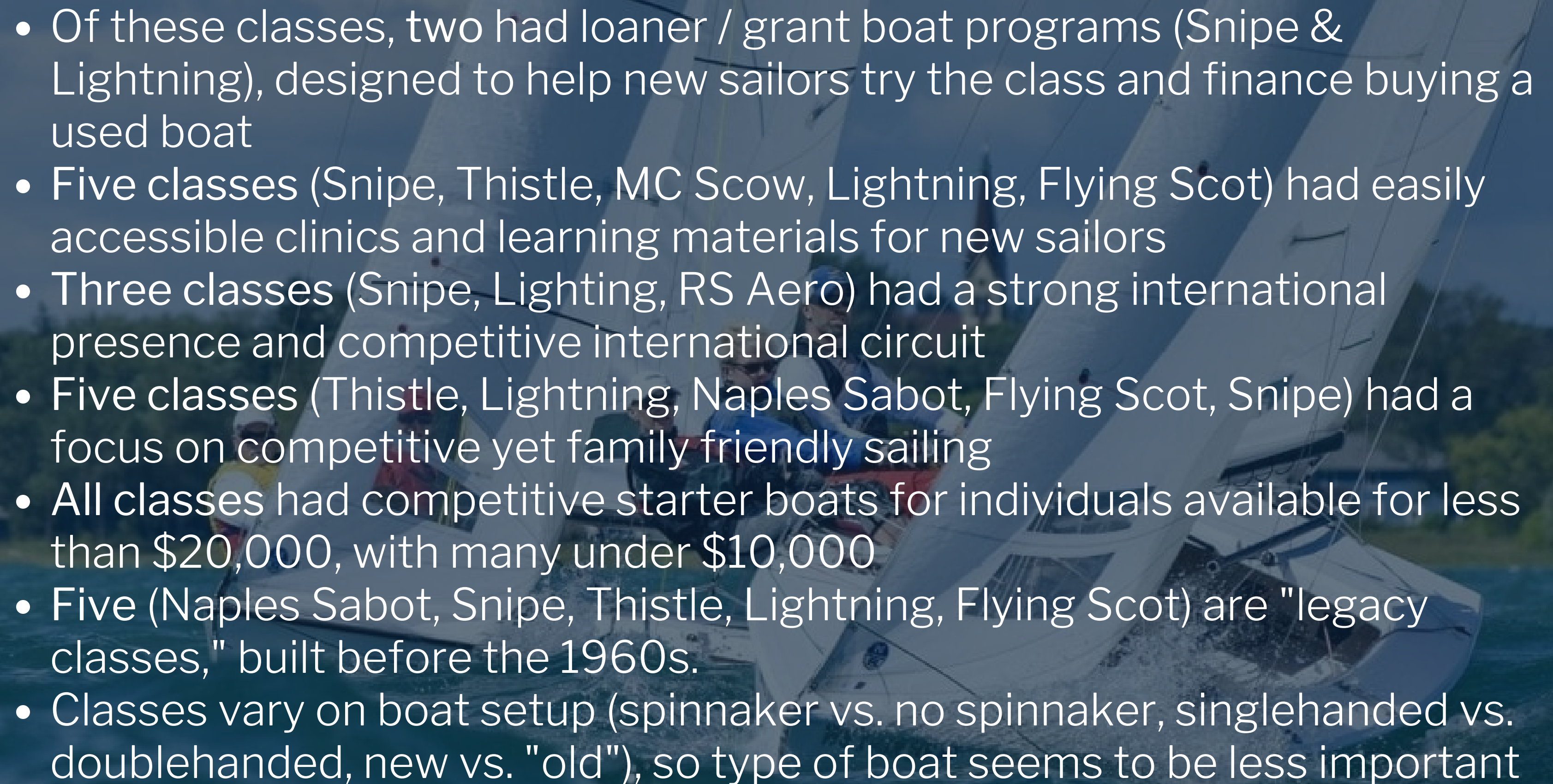
- **Growth in youth membership**
- **Total membership**
- **New boats produced in the last two years**
- **Demand for used boats**
- **Growth at National and North American champs**
- **Growth of women in membership**



## **“Health” Categories measured:**

- Growth in youth membership
- Total membership
- New boats produced in the last two years
- Demand for used boats
- Growth at National and North American champs
- Growth of women in membership



- 
- Of these classes, two had loaner / grant boat programs (Snipe & Lightning), designed to help new sailors try the class and finance buying a used boat
  - Five classes (Snipe, Thistle, MC Scow, Lightning, Flying Scot) had easily accessible clinics and learning materials for new sailors
  - Three classes (Snipe, Lightning, RS Aero) had a strong international presence and competitive international circuit
  - Five classes (Thistle, Lightning, Naples Sabot, Flying Scot, Snipe) had a focus on competitive yet family friendly sailing
  - All classes had competitive starter boats for individuals available for less than \$20,000, with many under \$10,000
  - Five (Naples Sabot, Snipe, Thistle, Lightning, Flying Scot) are "legacy classes," built before the 1960s.
  - Classes vary on boat setup (spinnaker vs. no spinnaker, singlehanded vs. doublehanded, new vs. "old"), so type of boat seems to be less important



## **NOTES ON THE BEST:**

Of these classes:

- Two had loaner / grant boat programs,
- Five classes had easily accessible clinics and learning materials for new sailors
- Three classes had a strong international presence and competitive international circuit
- Five classes had a focus on competitive yet family friendly sailing



- All classes had competitive starter boats for individuals available for less than \$20,000, with many under \$10,000
- Five are "legacy classes," built before the 1960s.
- Classes vary on boat setup (spinnaker vs. no spinnaker, singlehanded vs. doublehanded, new vs. "old"), so type of boat seems to be less important



# Feedback & Comments Received

- Local clinics (most repeated comment) - Be more welcoming and helpful to get newcomers up to speed.
- Promote learn to sail/race locally - Make local access to water a priority
- More socials - Promote fun & social over racing - Support non-racing sailing activities.
- "Our club has found boat share for non boat owners and many opportunities to sail in different types of sailboats. I suggest you examine this program as a model by Sarasota Sailing Squadron."
- Developing local regatta circuits - Fun beer can racing during the week
- "There is a need to get more women involved in the sport... the NCWSA (North Coast Women's Sailing Association) at Edgewater Yacht Club in Cleveland is a great example of how to do this."
- Exposure on popular media, TV, schools, free events.



## Comments:

Local clinics (most repeated comment) - Be more welcoming and helpful to get newcomers up to speed. Promote learn to sail/race locally - Make local access to water a priority More Socials - Promote fun & social over racing - Support non-racing sailing activities "Our club has found boat share for non-boat owners and many opportunities to sail in different types of sailboats. I suggest you examine this program as a model by Sarasota Sailing Squadron." Developing local regatta circuits - Fun beer can racing during the week "There



is a need to get more women involved in the sport... the NCWSA (North Coast Women's Sailing Association) at Edgewater Yacht Club in Cleveland is a great example of how to do this." Crew match nights. Dock talks that are for everyone, not just skippers - training crew in actual races Exposure on popular media, TV, schools, free events



# Class Survey Outcomes

- Develop inclusive strategies to retain / attract the 18 – 26-year-old population
- Create and support initiatives that promote local sailing organizations to provide an inclusive sailing environment.
- Publish / highlight class best practices
- Host a forum (zoom) for class leadership
- Expand the Siebel Sailors Program
- Feature specific classes that are successful
- Promote US Sailing’s “First Sail” program
- Link membership renewals for Local, Class and US Sailing



## **OUTCOMES / Take – ways**

- Develop inclusive strategies to retain / attract a diverse 18 – 26-year-old population
- Create and support initiatives that promote local sailing organizations to provide an inclusive sailing environment.
- Publish / highlight Class best practices



- Host a forum (zoom) for class leadership
- Expand the Siebel Sailors Program
- Feature specific classes that are successful
- Promote US Sailing's "First Sail" program
- Link membership renewals for Local, Class and US Sailing



**With thanks to the following who  
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