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SPORT. ENTERTAINMENT.

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Australian
Sailing

PARTICIPATION REVIEW

AUSTRALIAN SAILING

DRAFT REPORT | MAY 2025



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EXECUTIVE SUMMARY

- Sailing participation in Australia is limited by two key challenge types: Structural issues in how programs and pathways are designed and delivered, and Experiential barriers that impact visibility, accessibility, and inclusiveness
- Six core problems are holding the sport back, including inconsistent junior program delivery, inflexible participation formats, inconsistent first-time experiences, low awareness, and drop-off after training
- Five key customer segments have been identified, each with distinct motivations, formats, and needs across the Sailing pathway:
 - **The New Wave:** Young, adventurous sailors exploring both traditional and emerging formats
 - **Cruisers:** Older, experienced sailors who sail recreationally for enjoyment and social connection
 - **The Racing Crew:** Competition-focused sailors driven by performance and structure
 - **The Everyday Sailor:** Regular club members who value familiarity, community and routine
 - **The Club Community:** Newer, lifestyle-driven participants drawn to Sailing's social and wellness appeal
- Sailing currently lacks a nationally consistent way to attract and retain new participants, particularly those who are younger, time-poor, socially motivated, or looking for casual, lower-pressure ways to get involved
- Clubs are central to participation, but need clearer formats, better tools, and stronger national support to deliver consistently and sustainably
- To solve these challenges, four strategic pillars have been defined:
 1. **Unify the Entry Experience** – embrace consistent national formats and boost junior training delivery
 2. **Enable Flexible Participation** – create more casual, short-form, and lifestyle-aligned ways to sail
 3. **Build a Connected Sailing Ecosystem** – improve how Sailing is promoted, found, and navigated
 4. **Strengthen the Club Experience** – support delivery, volunteers, and innovation at the local level
- Each pillar directly responds to the core participation problems and is supported by 12 focused, actionable priorities to unlock growth across the full Sailing pathway
- This strategy provides a nationally aligned framework to increase visibility, modernise delivery, and make Sailing more relevant and accessible to more Australians
- Effective communication will be critical to success in aligning clubs, activating new formats, and connecting with future participants

The Participation Action Plan outlines 12 key actions for Sailing in Australia

These 12 key actions are the summary recommendations for Australian Sailing and will require collaboration across the Australian Sailing landscape

UNIFY THE ENTRY EXPERIENCE

- 01** Embrace and Activate the 'Discover Sailing' Experience
- 02** Clarify and Strengthen Entry Pathways for Juniors
- 03** Clarify Training Pathways & Progression

ENABLE FLEXIBLE PARTICIPATION

- 04** Create Flexible, Customer-First Sailing Offers
- 05** Equip Clubs to Activate Flexible Participation
- 06** Elevate Flexible Formats Through National Messaging And Incentives

BUILD A CONNECTED SAILING ECOSYSTEM

- 07** Centralise Information Through A National Digital Hub
- 08** Strengthen Digital Presence & Visibility
- 09** Shift Perceptions Through Targeted Storytelling

STRENGTHEN THE CLUB EXPERIENCE

- 10** Equip Clubs To Deliver Great Experiences
- 11** Upskill & Empower Volunteers
- 12** Support Clubs To Trial New Formats & Delivery Models

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01.

| SAILING'S CURRENT POSITION

Current Landscape Key Findings

EXECUTIVE SUMMARY

PASSION

In 2024, **13% of Australians were Fanatics of Sailing** (34th out of 43 sports)

Passion for Sailing grew by **3 p.p.** from 2020 to 2024 (10% to 13%)

54% of Sailing Fanatics are under the age of 35, which is more than most other Australian sports

Swimming and Surfing are the two most popular sports amongst Sailing Fanatics

PARTICIPATION

In FY24 there were **77k Sailing participants** across Australia

From FY16 to FY23, Sailing participation grew at a CAGR of **+4%**

82% of members have participated in Sailing/Yachting in the last 12 months

Keelboats/Yachts and Dinghies are the two most frequently participated activities, whilst **Windsurfing and Winging are the least**

DRIVERS & BARRIERS

47% of members initially got involved through family members, whilst **35%** started due to access to a local club

Enjoyment (89%), Being Outdoors (85%) and Sense of Freedom (77%) are the three most important motivating factors for members participation

Physical ability (60%) and cost (31%) were identified as the two primary factors that would ever stop members from Sailing

TRAINING

Learn to Wing had the lowest participation rate amongst members (3%)

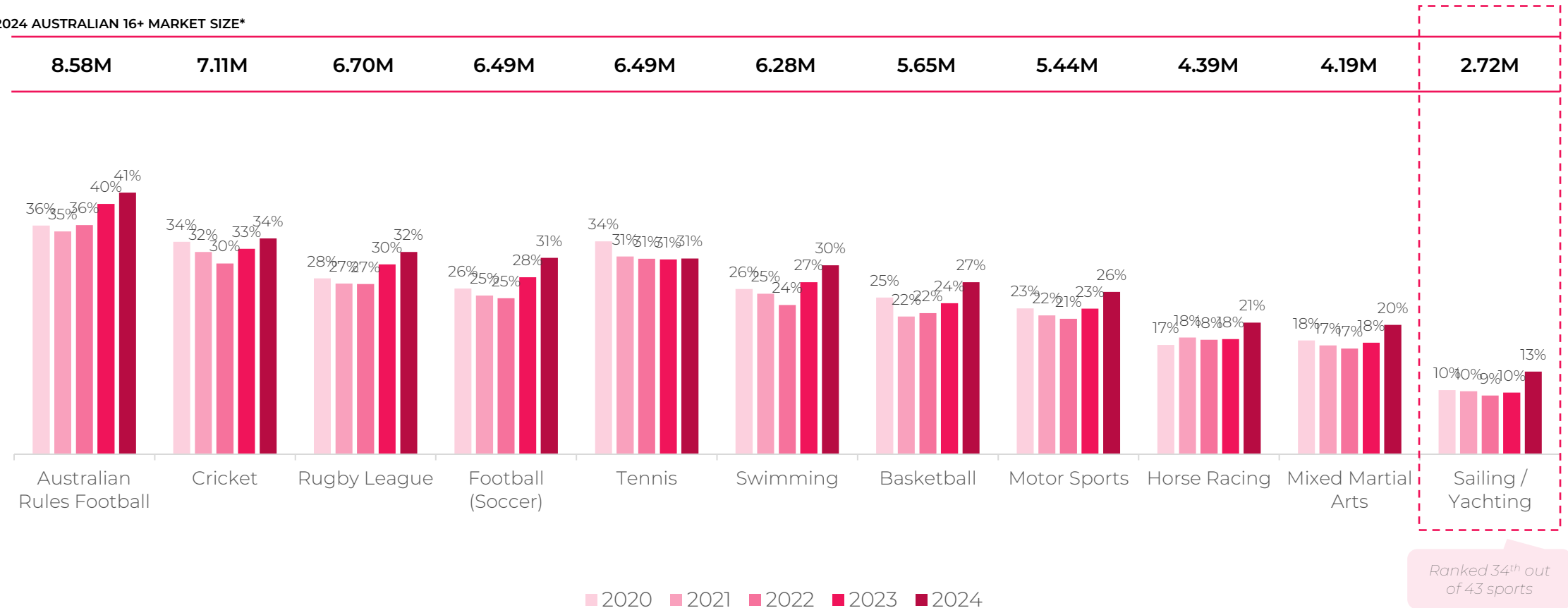
65% of members were aware of Tackers but had not participated in it

Despite strong belief that kids should start Sailing early, **only 20–23% of Member children aged 7–12** are currently engaged

In 2024 there were ~2.72m Sailing Fanatics in Australia, making it the 34th most popular sport amongst Australians

SPORT PASSION | BY YEARS

2024 AUSTRALIAN 16+ MARKET SIZE*



*Based on a 2023 16+ Australian population of n=20,926,116

Q.1 Using a scale of 1 to 5, where 1 indicates you are not at all passionate, and where 5 indicates you are highly passionate, please indicate your level of passion for each of the following sports

Base: 2021 (n=7,824), 2022 (n=7,909), 2023 (n=8,325), 2024 (n=8,624)

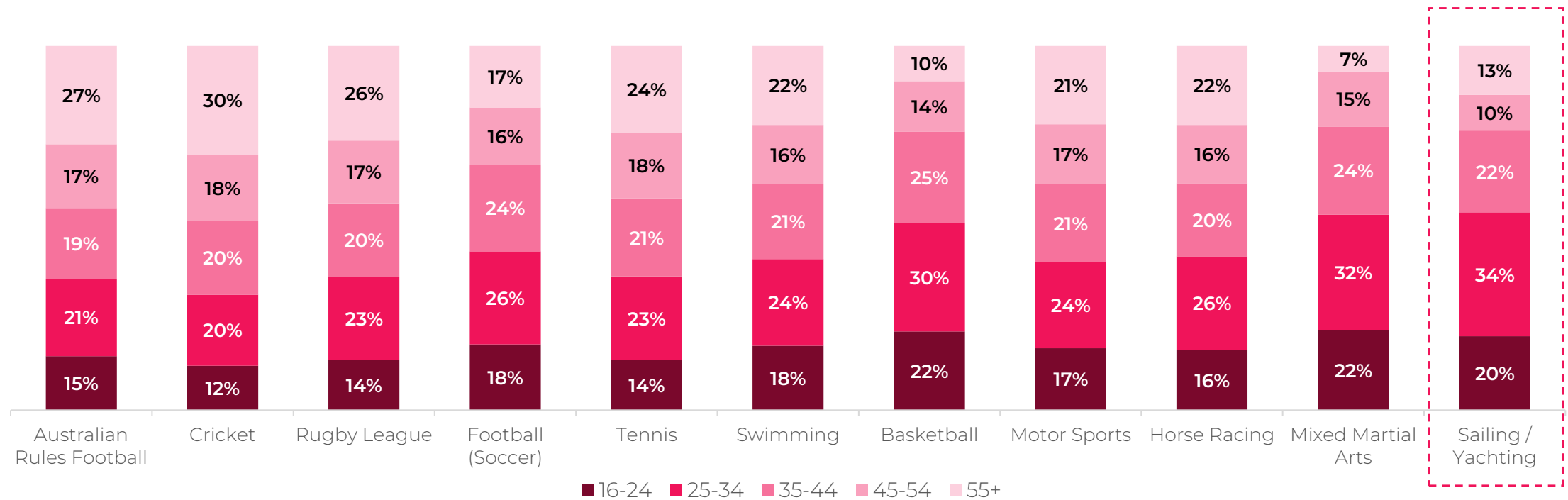
Source: Australian Sailing Members Survey (2025), Gemba Analysis (2025)

▲ ▼ Significant difference at 95% confidence interval

More than half of Sailing Fanatics are under 35, a higher proportion than any top 10 sport in Australia

AGE DISTRIBUTION OF FANATICS

AGE DISTRIBUTION OF FANATICS PER SPORT



*Based on a 2023 21-45 Australian population of n=8,988,290
Q.1 Using a scale of 1 to 5, where 1 indicates you are not at all passionate, and where 5 indicates you are highly passionate, please indicate your level of passion for each of the following sports
Base: 2024 - 16-24 (n=422), 25-34 (n=730), 35-44 (n=773), 45-54 (n=709), 55+ (n=1,854)
Source: Australian Sailing Members Survey (2025), Gemba Analysis (2025)

▲ ▼ Significant difference at 95% confidence interval

Sailing Fanatics are typically more interested in water sports

TOP SPORTS SAILING FANATICS VS NON-FANATICS

	SAILING FANATICS	NOT A SAILING FANATIC
1	Swimming	Australian Rules Football
2	Surfing	Cricket
3	Gymnastics	Rugby League
4	Basketball	Tennis
5	Australian Rules Football	Football (Soccer)
6	Diving	Swimming
7	Motor Sports	Basketball
8	Football (Soccer)	Motor Sports
9	Surf Life Saving	Horse Racing
10	Tennis	Mixed Martial Arts
11	Snow Skiing / Snowboarding	Boxing (Contact)
12	Mixed Martial Arts	Rugby Union
13	Rugby League	Gymnastics
14	Chess	Athletics (Track & field)
15	Rugby Union	Surfing
16	Cricket	Netball
17	Cycling	Golf
18	Athletics (Track & field)	Diving
19	Triathlons	Cycling
20	Horse Racing	Ten pin Bowling

= WATER SPORTS

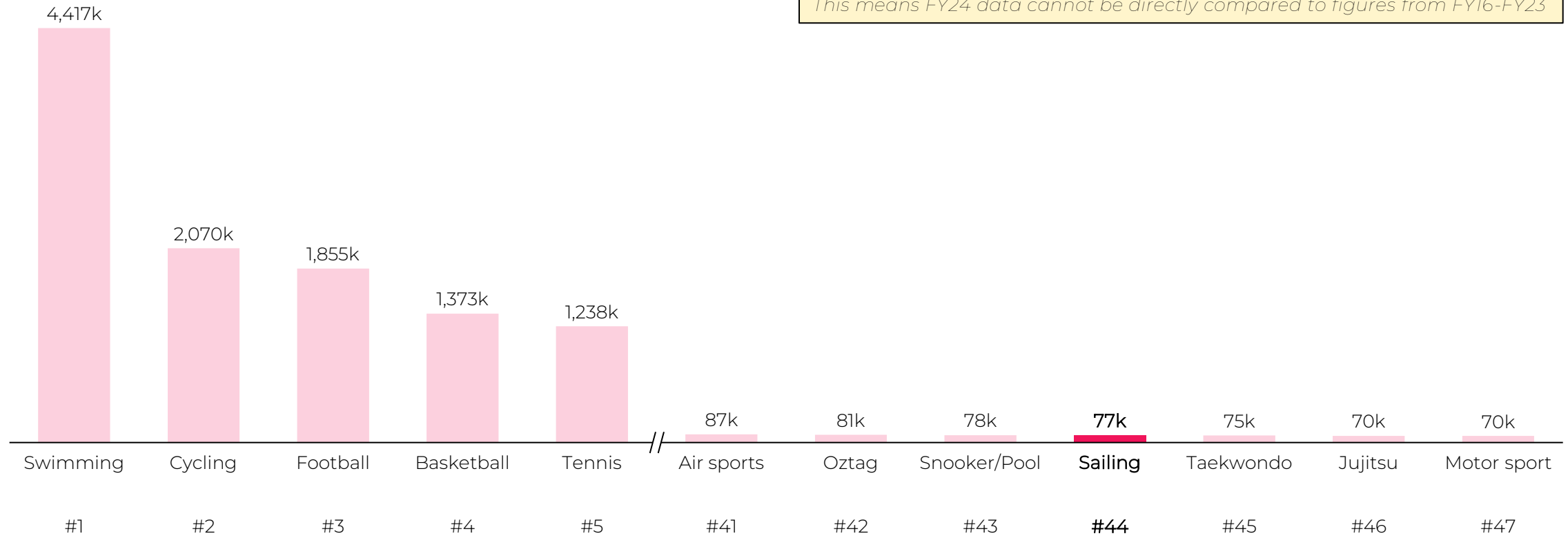
Q.1 Using a scale of 1 to 5, where 1 indicates you are not at all passionate, and where 5 indicates you are highly passionate, please indicate your level of passion for each of the following sports
 Base: 2024 –Sailing / Yachting Fanatics (n=577), Not a Sailing Yachting Participants (n=8,219)
 Source: Australian Sailing Members Survey (2025), Gemba Analysis (2025)



In FY24 Sailing was the 44th most participated sport in Australia

AUSTRALIAN SPORTS PARTICIPATION | FY24

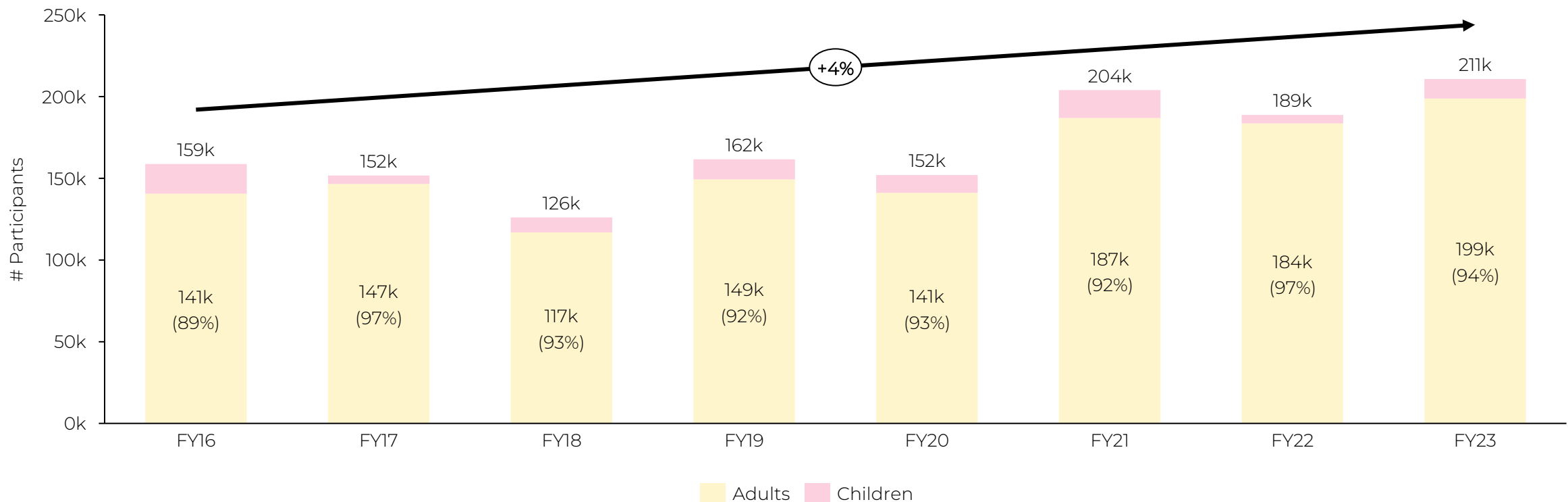
Note: In FY24 AusPlay established a new methodology for collecting data.
This means FY24 data cannot be directly compared to figures from FY16-FY23



Sailing participation grew at a CAGR of +4% from FY16 to FY23, with adult participation typically making up ~95% of yearly participants

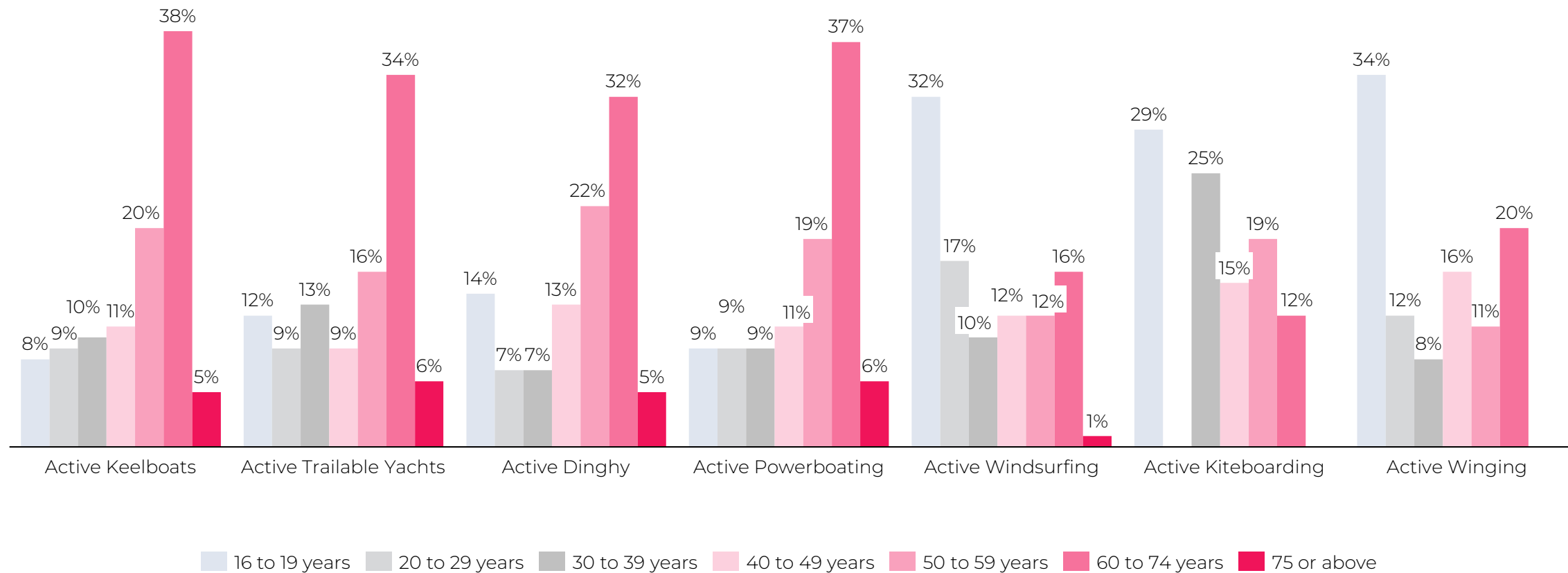
SAILING PARTICIPATION IN AUSTRALIA | FY16-FY23

Note: In FY24 AusPlay established a new methodology for collecting data. This means FY24 data cannot be directly compared to figures from FY16-FY23



Keelboats, Trailable Yachts, Dinghy & Powerboating are popular among older members, unlike Windsurfing, Kiteboarding and Winging

PARTICIPATION BY AGE | % OF ACTIVE MEMBERS



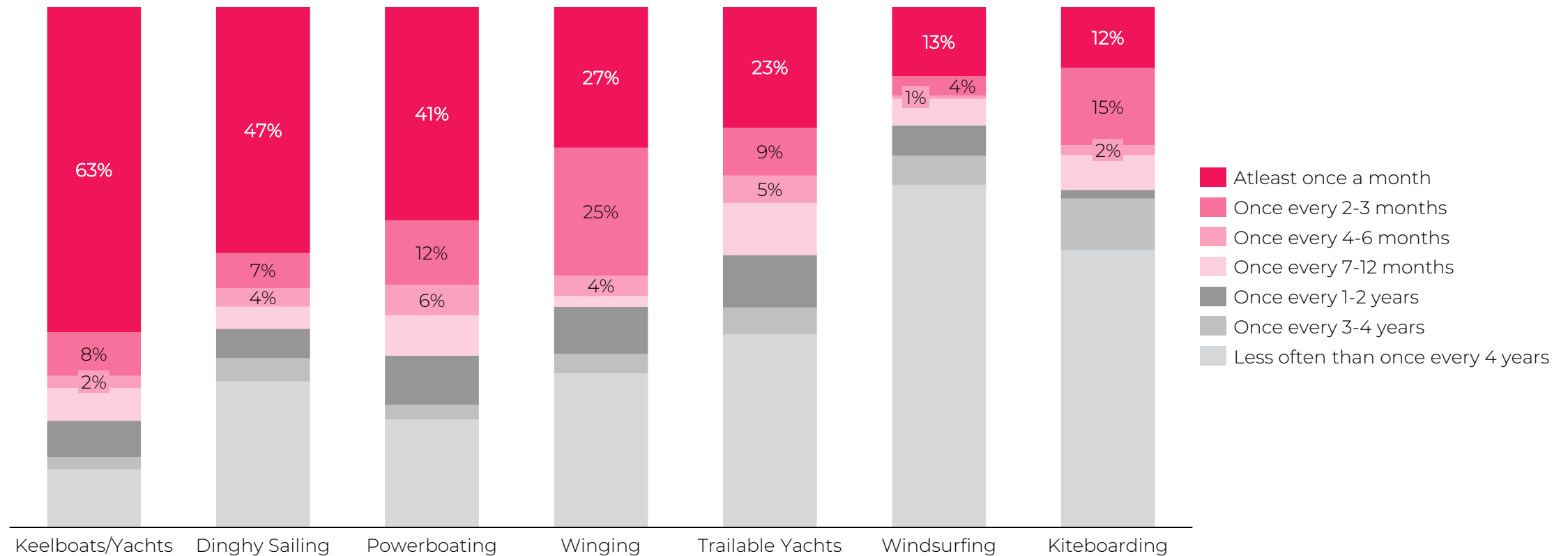
Q: Thinking about each of the following boating/Sailing activities, when did you last participate in each of these activities?

Base; Weighted Active members of each format n=556

Source: Australian Sailing Members Survey (2025), Gemba Analysis (2025)

Keelboats/Yachts are the most frequently participated, with 63% of active members having participated at least once a month

FREQUENCY OF PARTICIPATION | % OF ACTIVE MEMBERS



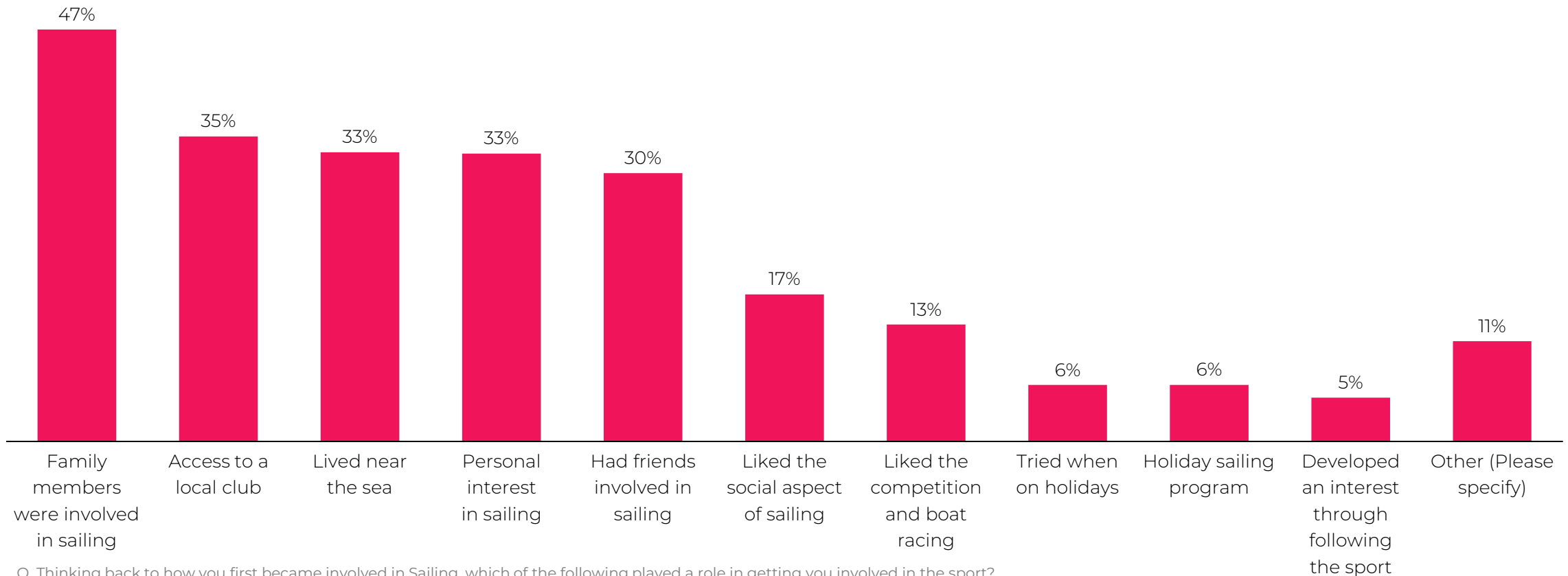
Q: Which of the following best describes how often you usually participate in each of these activities?

Base; Weighted n=506

Source: Australian Sailing Members Survey (2025), Gemba Analysis (2025)

Members have typically got involved in Sailing through family members, access to local clubs or proximity to water

DRIVERS OF INITIAL INVOLVEMENT | % OF MEMBERS



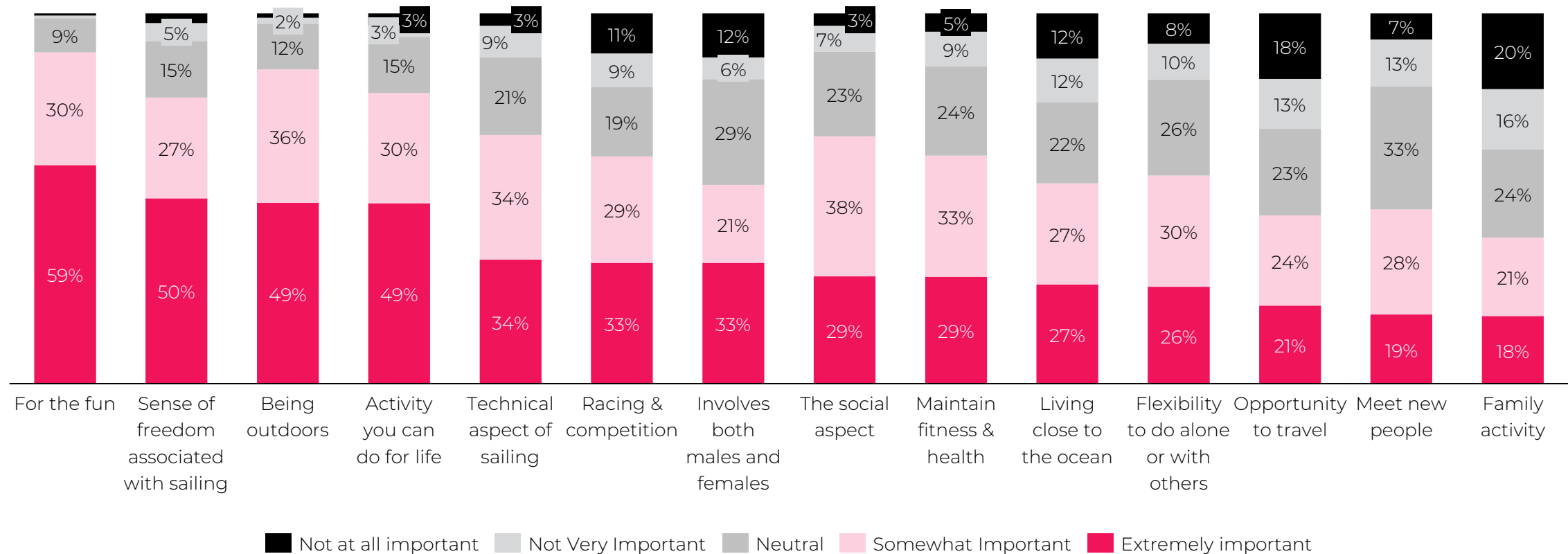
Q. Thinking back to how you first became involved in Sailing, which of the following played a role in getting you involved in the sport?

Base; Weighted n=552

Source: Australian Sailing Members Survey (2025), Gemba Analysis (2025)

Enjoyment and the sense of freedom provided by Sailing are two major factors motivating members to participate in Sailing

MOTIVATING FACTORS | % MEMBERS



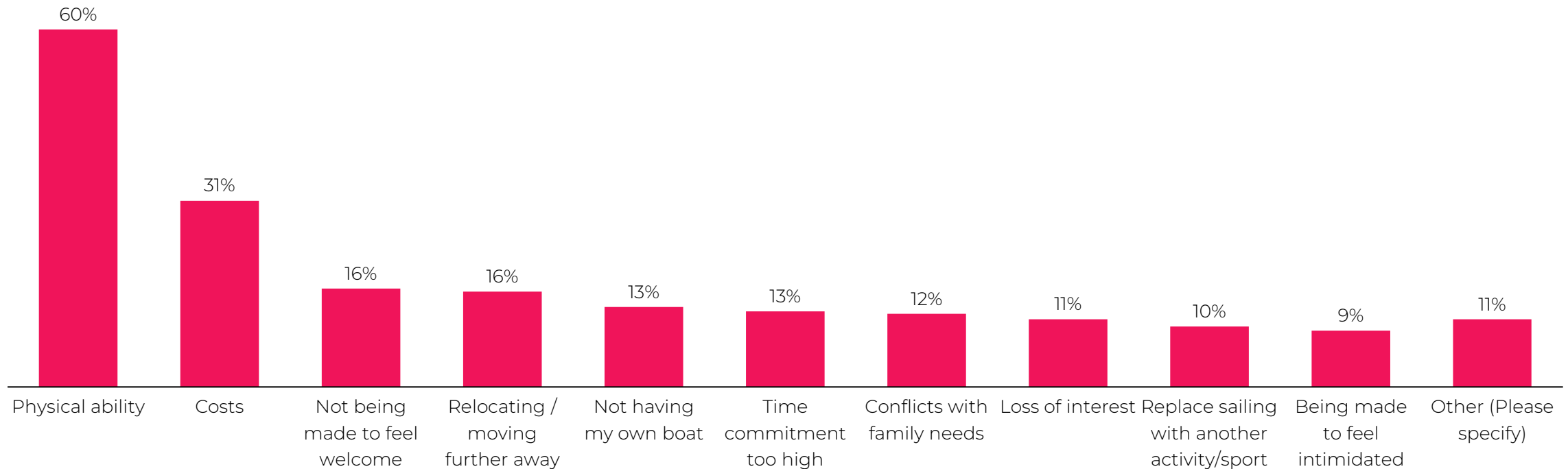
Q. Please indicate the degree to which the following factors motivate you to participate in the sport of Sailing on a scale of 1 to 5, where 1 equals not at all important to you, and equals 5 indicates extremely important to you.

Base: Weighted n=552

Source: Australian Sailing Members Survey (2025), Gemba Analysis (2025)

Physical ability and costs are the two most likely factors to influence members' decision to stop Sailing

INFLUENCES TO STOP SAILING | TOP 10 | % OF MEMBERS



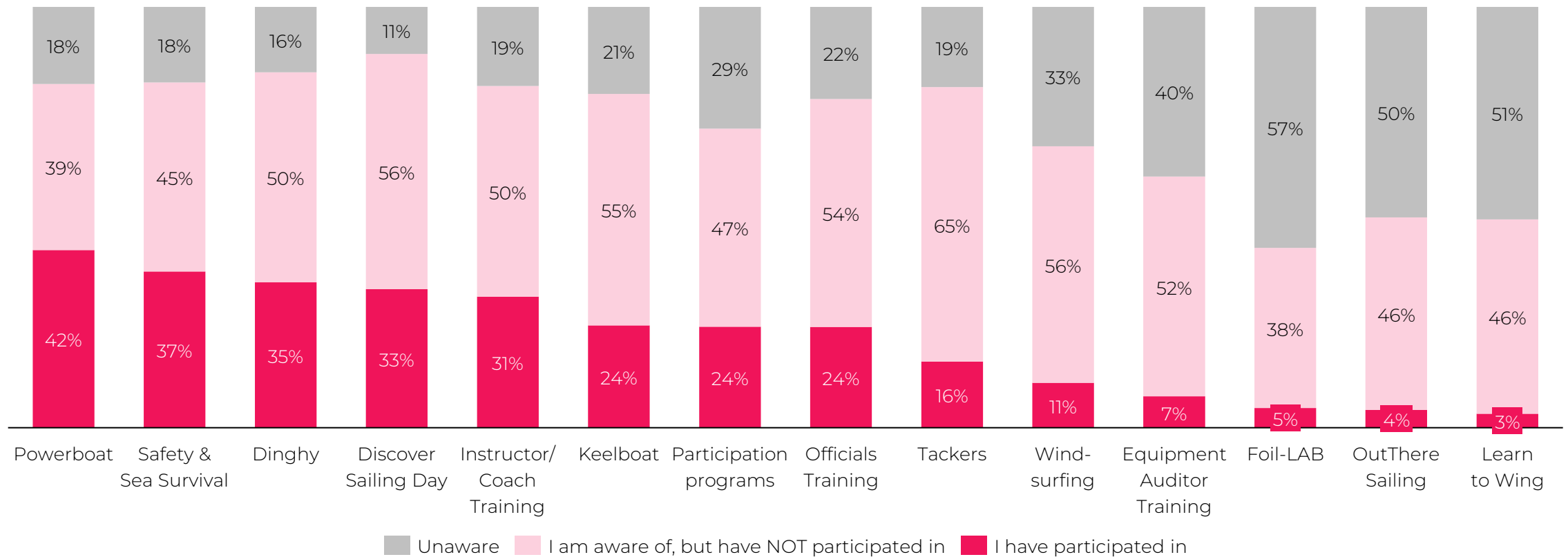
Q. If you were ever to stop Sailing, which of the following are most likely to influence your decision? Please select all that apply.

Base; Weighted n=552

Source: Australian Sailing Members Survey (2025), Gemba Analysis (2025)

Powerboat training is the most prominent amongst members, whilst Tackers has high awareness with low participation rates

TRAINING COURSE COMPLETION | % MEMBERS



Q. Looking at the different training courses available to sailors of all levels, can you please indicate your level of involvement in each?

Base; Weighted n=552

Source: Australian Sailing Members Survey (2025), Gemba Analysis (2025)

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02.

| PROBLEMS TO BE SOLVED

Problems to be solved for Sailing in Australia have been defined across two groups; Structural and Experiential & Accessibility

PROBLEMS TO BE SOLVED

STRUCTURAL

System-level issues that reflect how Sailing programs, pathways, and systems are designed and delivered

These challenges stem from the way Sailing is structured today, including when and how people enter the sport, progress through it, and stay involved. They highlight where current formats and delivery models may no longer align with participant needs

EXPERIENTIAL & ACCESSIBILITY

Participant-facing barriers that shape how Sailing is found, understood, and experienced

These challenges relate to how Sailing presents itself to the public. From awareness and visibility, to perceptions, inclusivity, and the quality of first-time experiences, they focus on how easily someone can discover and engage with the sport

Structural problems are limiting early participation, progression, and long-term involvement in Sailing

PROBLEMS TO BE SOLVED | STRUCTURAL

PROBLEM #1

INCONSISTENT JUNIOR PROGRAM DELIVERY

Tackers works well where delivered, but access and delivery vary significantly across clubs

- Awareness of Tackers is high among members; however, participation is not universal among those with children or grandchildren involved
- Tackers is only delivered across a small section of the 350 clubs across Australia

PROBLEM #2

SAILING FORMATS DON'T FIT MODERN LIFESTYLES

Traditional formats demand high time investment and aren't suited to modern lifestyles – Sailing needs shorter, more adaptable ways to stay involved

- Traditional formats are a high investment of time (e.g. 6 hours)
- Participants want formats that work around time, cost, and motivation, with "casual, bite-sized, and accessible" options preferred
- Flexible offers make Sailing feel more inclusive and adaptable to time, cost, and confidence levels

PROBLEM #3

GAPS BETWEEN TRAINING AND RETENTION

Participation in training courses doesn't consistently translate into long-term involvement

- 42% of members have completed Powerboat training, the highest of any course
- Cost (31%), not owning a boat (13%), time commitment too high (12%) are some of the barriers to ongoing participation

Problems such as a lack of first time experience, poor awareness and cultural perceptions are impacting the participant experience

PROBLEMS TO BE SOLVED | EXPERIENTIAL & ACCESSIBILITY

PROBLEM #4

NO CONSISTENT FIRST-TIME EXPERIENCE

Sailing lacks a standardised, low-barrier entry point, early engagement is ad hoc and highly variable

- Members most often get involved via family members (47%) and access to a local club (35%)
- Sailing doesn't currently offer a clearly branded or consistent "Come & Try" format across clubs
- Despite the availability of resources to support clubs with this, such as Discover Sailing Days, a uniform approach by clubs has not been adopted

PROBLEM #5

AWARENESS IS LOW AND INFORMATION IS HARD TO FIND

People don't know where to start. Program awareness is low and most rely on informal club conversations to find information

- 60% seek info by asking someone at a club (most common channel)
- Only 39% use the Australian Sailing website
- Participants want a single online hub with videos, pathways, tips, and local contacts
- Low participation in new programs (e.g. Learn to Wing – 3%) despite satisfaction

PROBLEM #6

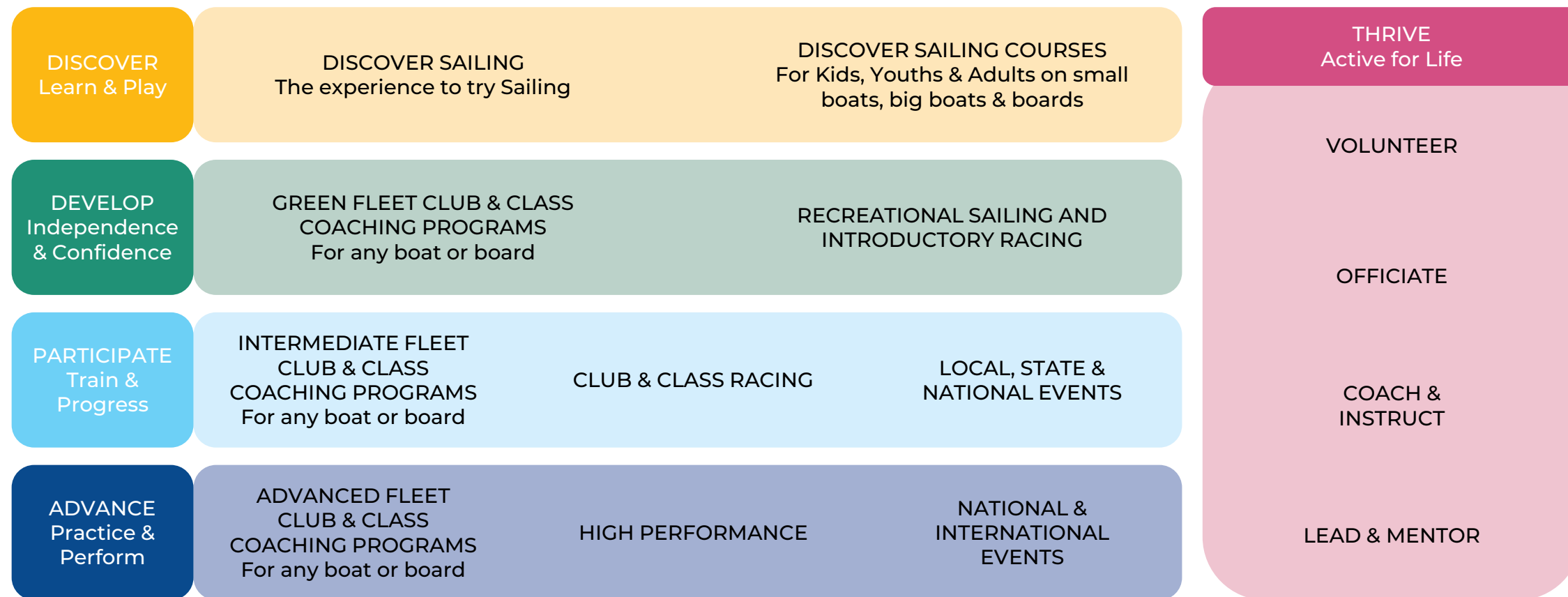
CULTURAL PERCEPTIONS STILL EXIST

Although younger audiences are interested, legacy perceptions persist and limit engagement

- Sailing ranks 34th out of 43 sports in terms of passion
- Yet 54% of Sailing fanatics are under 35, more than any top-10 sport
- Likely reasons to stop Sailing include: Physical ability (60%), Cost (31%) and Not feeling welcome or intimidated (16–18%)

The Australian Sailing pathway aims to get more people on the water, in more ways, more often

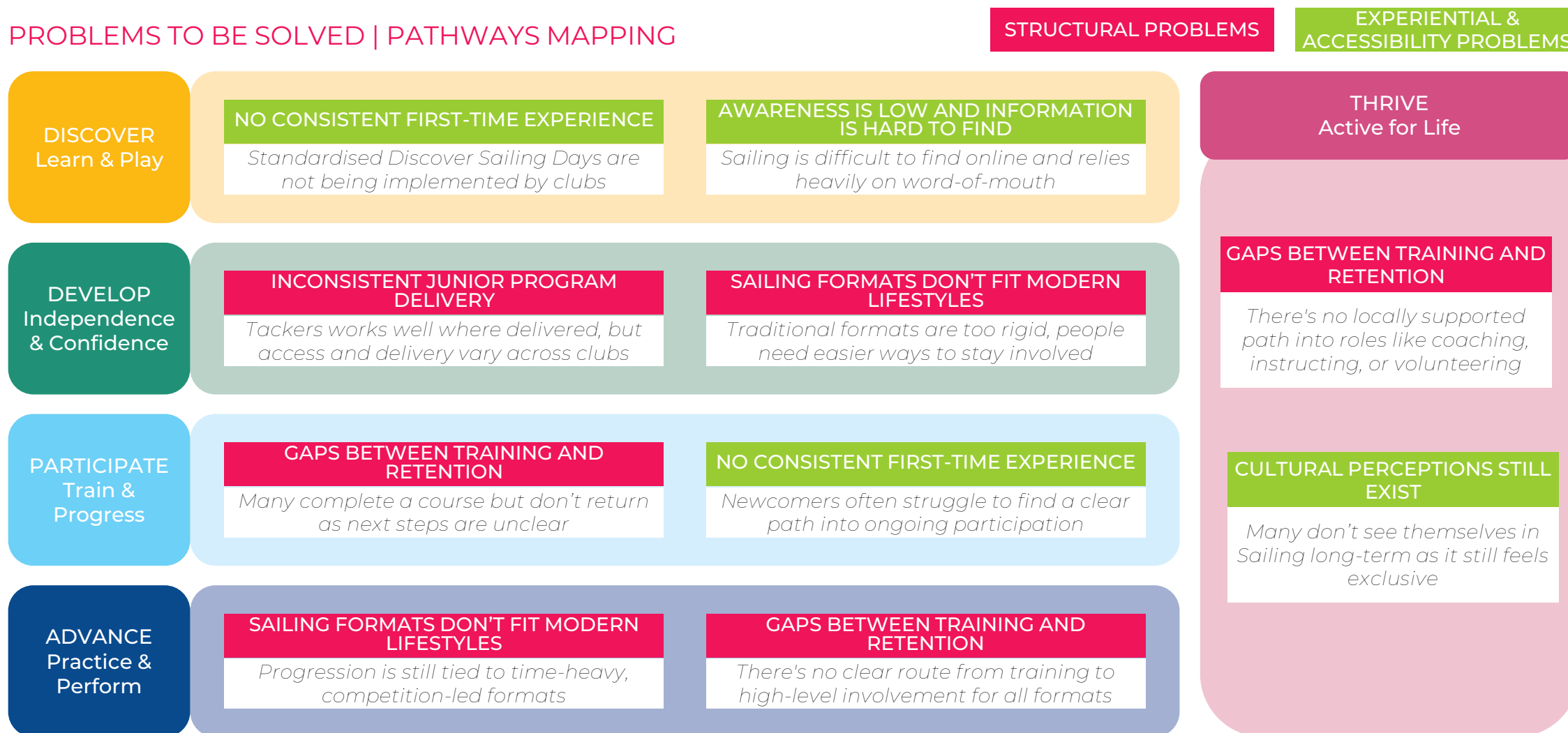
AUSTRALIAN SAILING PATHWAY



Australian Sailing has resources to support clubs at every stage of the pathway. However, the research indicates clubs are not adopting these and this is impacting the community's perceptions.

Experiential problems are impacting the entry point of the pathway, but Structural challenges exist across the latter stages

PROBLEMS TO BE SOLVED | PATHWAYS MAPPING



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03.

| PRIORITY CUSTOMERS

Sailing in Australia has five key customers, each with different characteristics and engagement methods

PRIORITY CUSTOMERS

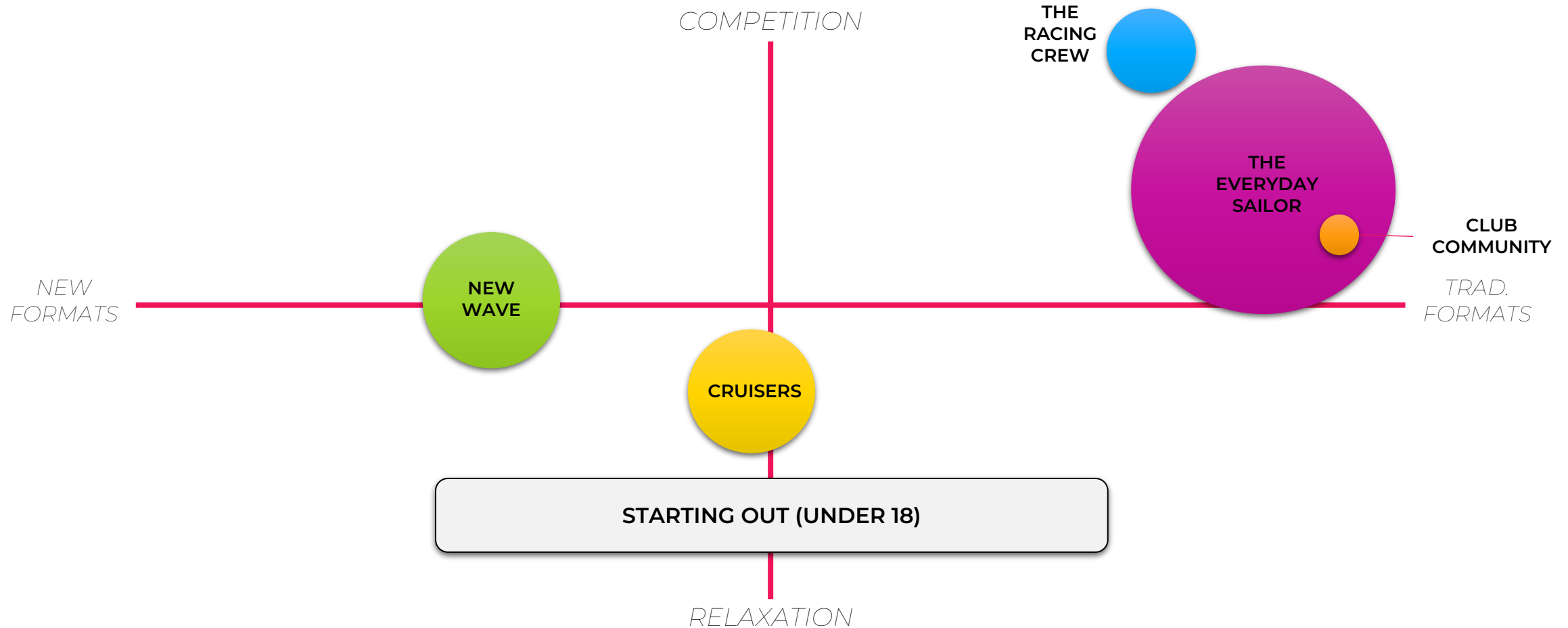
NAME	SIZE	DESCRIPTION	KEY CHARACTERISTICS		
NEW WAVE	15%	Young, adventurous sailors who value freedom, fun, and time outdoors. Comfortable in both traditional and newer styles like winging or foiling, and motivated by progression	YOUNGER ADULTS	MIXED GENDER	ENJOY NEWER FORMATS
CRUISERS	19%	Experienced older sailors who cruise for relaxation and social connection. Prefer keelboats or yachts and are less interested in racing or formal programs	PRIMARILY AGED 50-74	MIXED GENDER	SAIL TO RELAX
THE RACING CREW	9%	Competitive sailors who are focused on racing, performance, and structured participation. Sailing is a serious, technical pursuit and often club-based	TYPICALLY AGED 16-19 OR 50-74+	MALE SKEWED	RACE COMPETITIVELY
THE EVERYDAY SAILOR	55%	Regular club sailors who enjoy routine, social sailing, and light competition. Loyal to traditional formats and often engaged in club life and training	AGED 60+	MALE SKEWED	SAIL REGULARLY
CLUB COMMUNITY*	2%	Social, lifestyle-driven participants who enjoy being around Sailing more than competing. Often newer to the sport and motivated by connection and flexibility	TYPICALLY AGED 20-30 OR 60+	FEMALE SKEWED	SOCIALLY MOTIVATED

* The Club Community has been identified as a customer segment for Sailing. But due to its size will not be considered in future recommendations

Source: Australian Sailing Members Survey (2025), Gemba Analysis (2025)

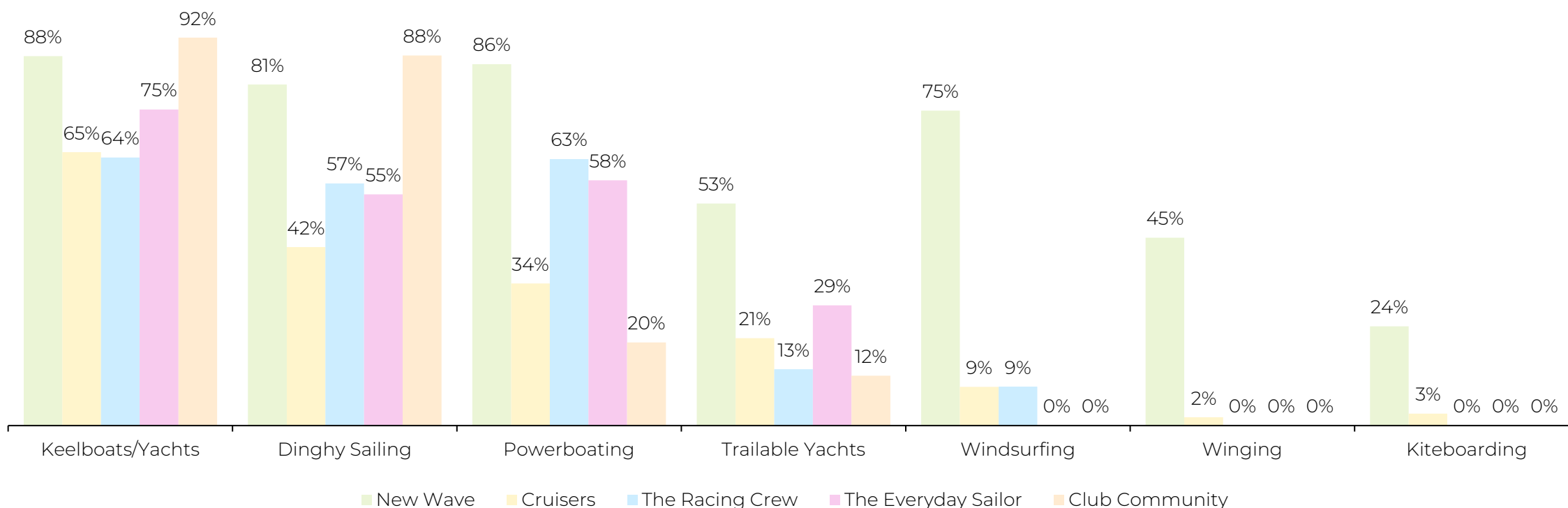
Whilst not a key deliverable, Gemba has identified five different customer segments based on engagement and interaction

INDICATIVE SAILING SEGMENTS | MEMBERS



Keelboats are popular across all segments, whereas Windsurfing, Kiteboarding, and Winging appeal more to our New Wave segment

PARTICIPATION BY SEGMENT | % OF MEMBERS



Each customer segment faces different challenges

RELEVANT CUSTOMER PROBLEMS

	STRUCTURAL PROBLEMS			EXPERIENTIAL & ACCESSIBILITY PROBLEMS		
NEW WAVE	INCONSISTENT JUNIOR PROGRAM DELIVERY	SAILING FORMATS DON'T FIT MODERN LIFESTYLES	GAPS BETWEEN TRAINING AND RETENTION	NO CONSISTENT FIRST-TIME EXPERIENCE	AWARENESS IS LOW AND INFORMATION IS HARD TO FIND	CULTURAL PERCEPTIONS STILL EXIST
CRUISERS	INCONSISTENT JUNIOR PROGRAM DELIVERY	SAILING FORMATS DON'T FIT MODERN LIFESTYLES	GAPS BETWEEN TRAINING AND RETENTION	NO CONSISTENT FIRST-TIME EXPERIENCE	AWARENESS IS LOW AND INFORMATION IS HARD TO FIND	CULTURAL PERCEPTIONS STILL EXIST
THE RACING CREW	INCONSISTENT JUNIOR PROGRAM DELIVERY	SAILING FORMATS DON'T FIT MODERN LIFESTYLES	GAPS BETWEEN TRAINING AND RETENTION	NO CONSISTENT FIRST-TIME EXPERIENCE	AWARENESS IS LOW AND INFORMATION IS HARD TO FIND	CULTURAL PERCEPTIONS STILL EXIST
THE EVERYDAY SAILOR	INCONSISTENT JUNIOR PROGRAM DELIVERY	SAILING FORMATS DON'T FIT MODERN LIFESTYLES	GAPS BETWEEN TRAINING AND RETENTION	NO CONSISTENT FIRST-TIME EXPERIENCE	AWARENESS IS LOW AND INFORMATION IS HARD TO FIND	CULTURAL PERCEPTIONS STILL EXIST



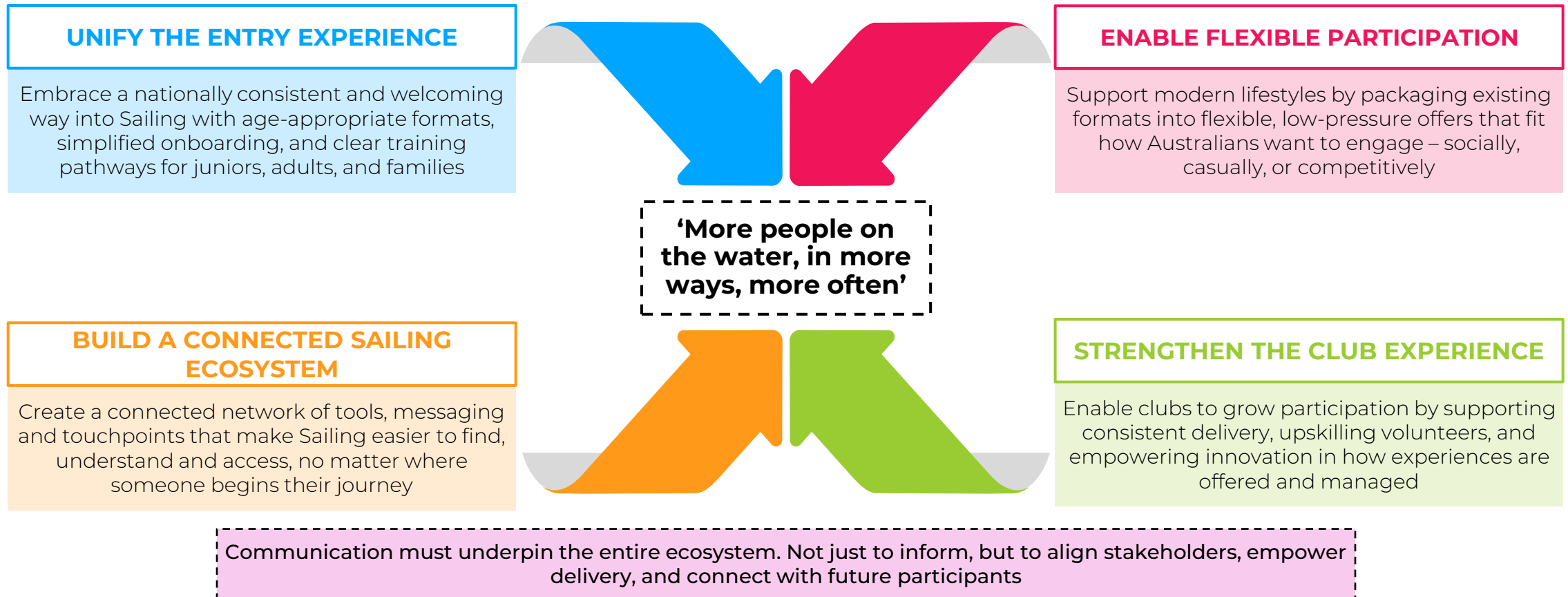
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| RECOMMENDATIONS

Four strategic priorities have been identified to grow Sailing participation across Australia

PARTICIPATION STRATEGY SUMMARY



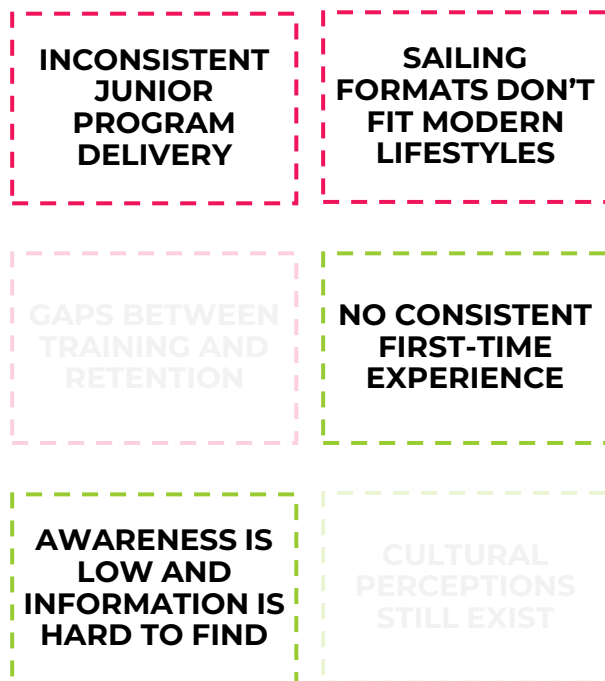
UNIFY THE ENTRY EXPERIENCE

Embrace a nationally consistent and welcoming way into Sailing with age-appropriate formats, simplified onboarding, and clear training pathways for juniors, adults, and families

Unifying the entry experience will lower barriers, build confidence, and make it easier for more people to start Sailing

UNIFY THE ENTRY EXPERIENCE

WHICH PROBLEMS WILL THIS SOLVE?



WHO WILL IT SERVE?

NEW WAVE

CRUISERS

These segments are either new to Sailing or returning later in life, often entering through non-traditional formats. A consistent and simplified entry experience removes confusion and lowers the barrier to getting started

WHAT DO WE NEED TO DO?

- 01** **Embrace and Activate the 'Discover Sailing' Experience**
Embrace and promote Discover Sailing tools to deliver a consistent, welcoming first-Sail experience that's easy for clubs to run and accessible for kids, adults, and families
- 02** **Clarify and Strengthen Entry Pathways for Juniors**
Promote clear, consistent training pathways like Tackers, helping clubs deliver quality junior experiences and reducing variation across the network
- 03** **Clarify Training Pathways & Progression**
Map how participants progress from first session to ongoing involvement, with clear, age-appropriate junior pathways that support skill-building from day one

ENABLE FLEXIBLE PARTICIPATION

Support modern lifestyles by packaging existing formats into flexible, low-pressure offers that fit how Australians want to engage – socially, casually, or competitively

Enabling flexible participation will modernise how people engage with Sailing, making it more accessible, adaptable, and sustainable

ENABLE FLEXIBLE PARTICIPATION

WHICH PROBLEMS WILL THIS SOLVE?



WHO WILL IT SERVE?



These segments want to sail in ways that fit their lifestyle, whether that's competitive, social, short-format, or low-commitment. Flexible offers make Sailing feel more modern, inclusive, and adaptable to time, cost, and confidence levels

WHAT DO WE NEED TO DO?

- 01** **Create Flexible, Customer-First Sailing Offers**
Build short, social, and easy-to-access offers that fit real motivations, whether it's flexibility, fun, family time, or personal achievement, helping more people start Sailing on their terms
- 02** **Equip Clubs to Activate Flexible Participation**
Educate and support clubs with tools and templates to package and promote flexible Sailing offers, helping attract new participants through short-form, social, and low-commitment pathways
- 03** **Elevate Flexible Formats Through National Messaging And Incentives**
Promote short-form and social Sailing as valid ways to participate, using national messaging and club incentives to shift perceptions and normalise flexible formats

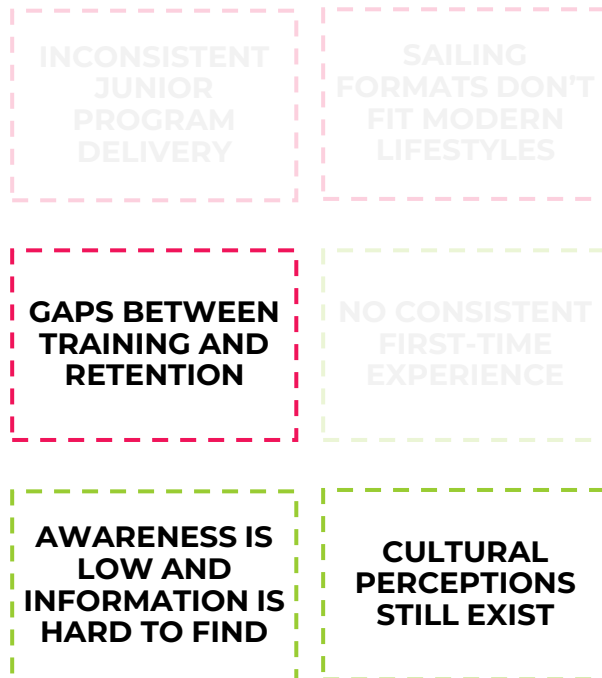
BUILD A CONNECTED SAILING ECOSYSTEM

Create a connected network of tools, messaging and touchpoints that make Sailing easier to find, understand and access, no matter where someone begins their journey

Building a connected Sailing ecosystem will make the sport easier to find, understand and stay engaged with at every stage of the journey

BUILD A CONNECTED SAILING ECOSYSTEM

WHICH PROBLEMS WILL THIS SOLVE?



WHO WILL IT SERVE?

NEW WAVE

**THE EVERYDAY
SAILOR**

These segments either lack strong entry points or fall through the cracks post-training. A clearer, more visible ecosystem (both digital and physical) makes it easier to find the next step, feel welcome, and stay involved

WHAT DO WE NEED TO DO?

01

Centralise Information Through A National Digital Hub

Create a single, user-friendly platform that connects people to programs, clubs, and training, helping new and existing participants find what they need quickly and easily

02

Strengthen Digital Presence & Visibility

Elevate Australian Sailing's digital role: improve SEO, social, and partnerships so new audiences can discover Sailing organically and easily online

03

Shift Perceptions Through Targeted Storytelling

Use modern storytelling to update how Sailing is perceived. Show that it's active, diverse, inclusive, and relevant to how Australians want to spend time today

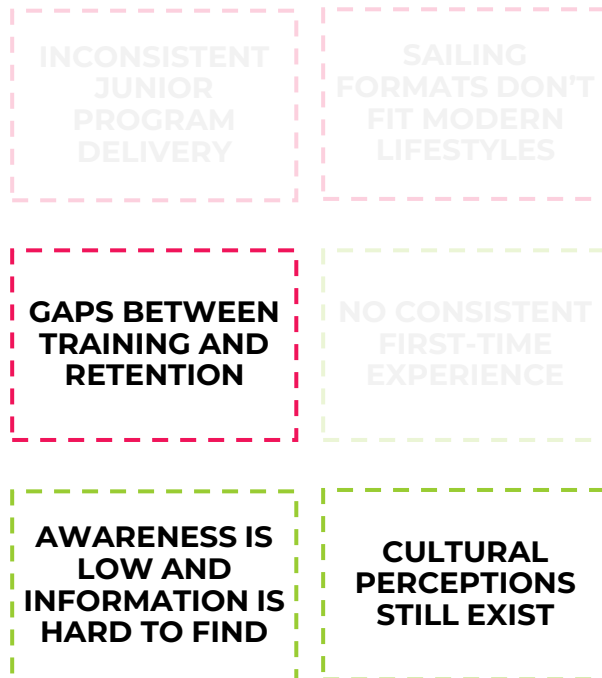
STRENGTHEN THE CLUB EXPERIENCE

Enable clubs to grow participation by supporting consistent delivery, upskilling volunteers, and empowering innovation in how experiences are offered and managed

Strengthening the club experience will improve delivery, build confidence, and help clubs retain more sailors for longer

STRENGTHEN THE CLUB EXPERIENCE

WHICH PROBLEMS WILL THIS SOLVE?



WHO WILL IT SERVE?

CRUISERS

**THE RACING
CREW**

**THE EVERYDAY
SAILOR**

These are core segments that rely on clubs to participate regularly, but many clubs face challenges with delivery, resources, or relevance. Strengthening the club experience will lift quality, improve retention, and modernise what Sailing can offer

WHAT DO WE NEED TO DO?

01

Equip Clubs To Deliver Great Experiences
Provide clubs with the tools and support needed to deliver welcoming, consistent and high-quality participation experiences across all formats

02

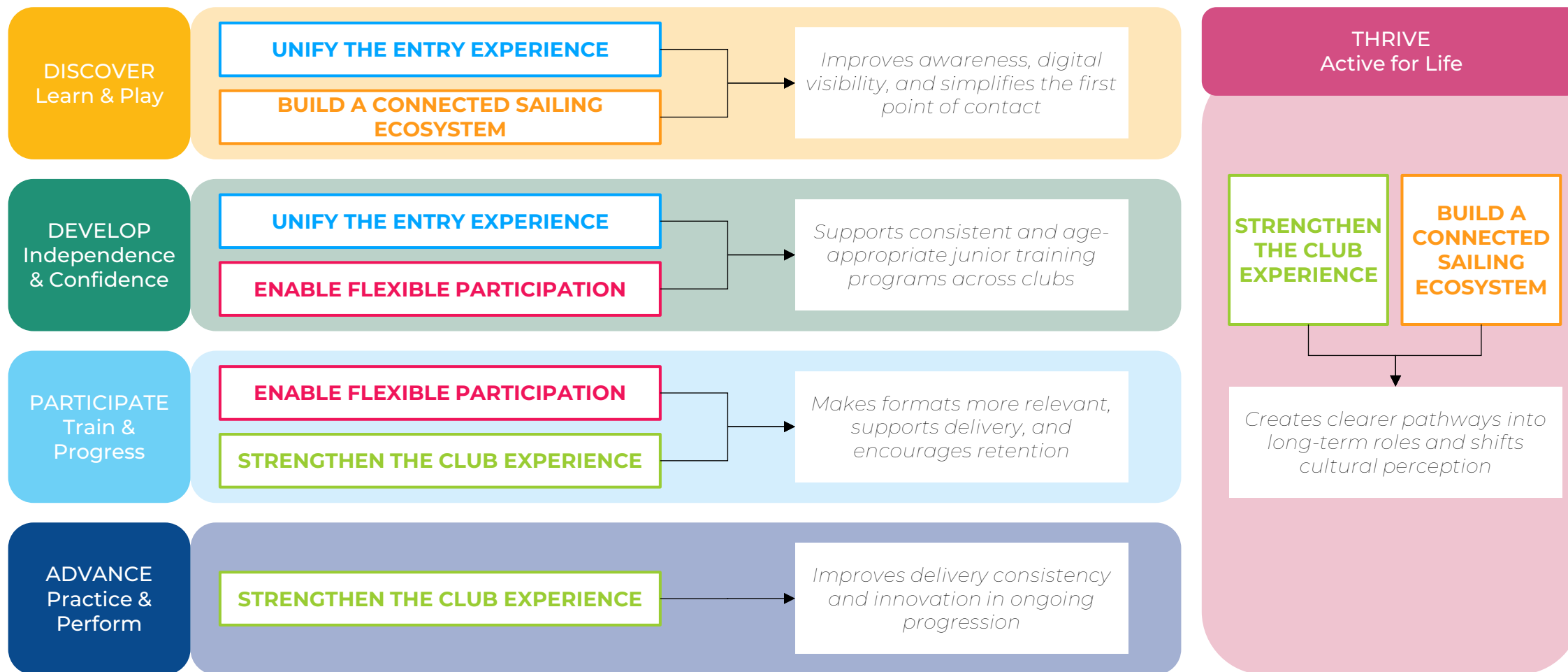
Upskill & Empower Volunteers
Recognise, train, and equip club volunteers as critical to the participation experience and support their development with practical resources and national recognition

03

Support Clubs To Trial New Formats & Delivery Models
Equip clubs to test new ways of delivering Sailing, from social formats to seasonal offers, with support to innovate while staying aligned with national strategy

Each pillar targets key stages of the journey, reinforcing entry, progression and lifelong engagement

STRATEGIC PRIORITIES | PATHWAY MAPPING



Communication will be critical to ensuring the strategy is understood, embraced and delivered

CRITICAL ENABLER | COMMUNICATION

WHY COMMUNICATION IS IMPORTANT



WHAT SUCCESS LOOKS LIKE



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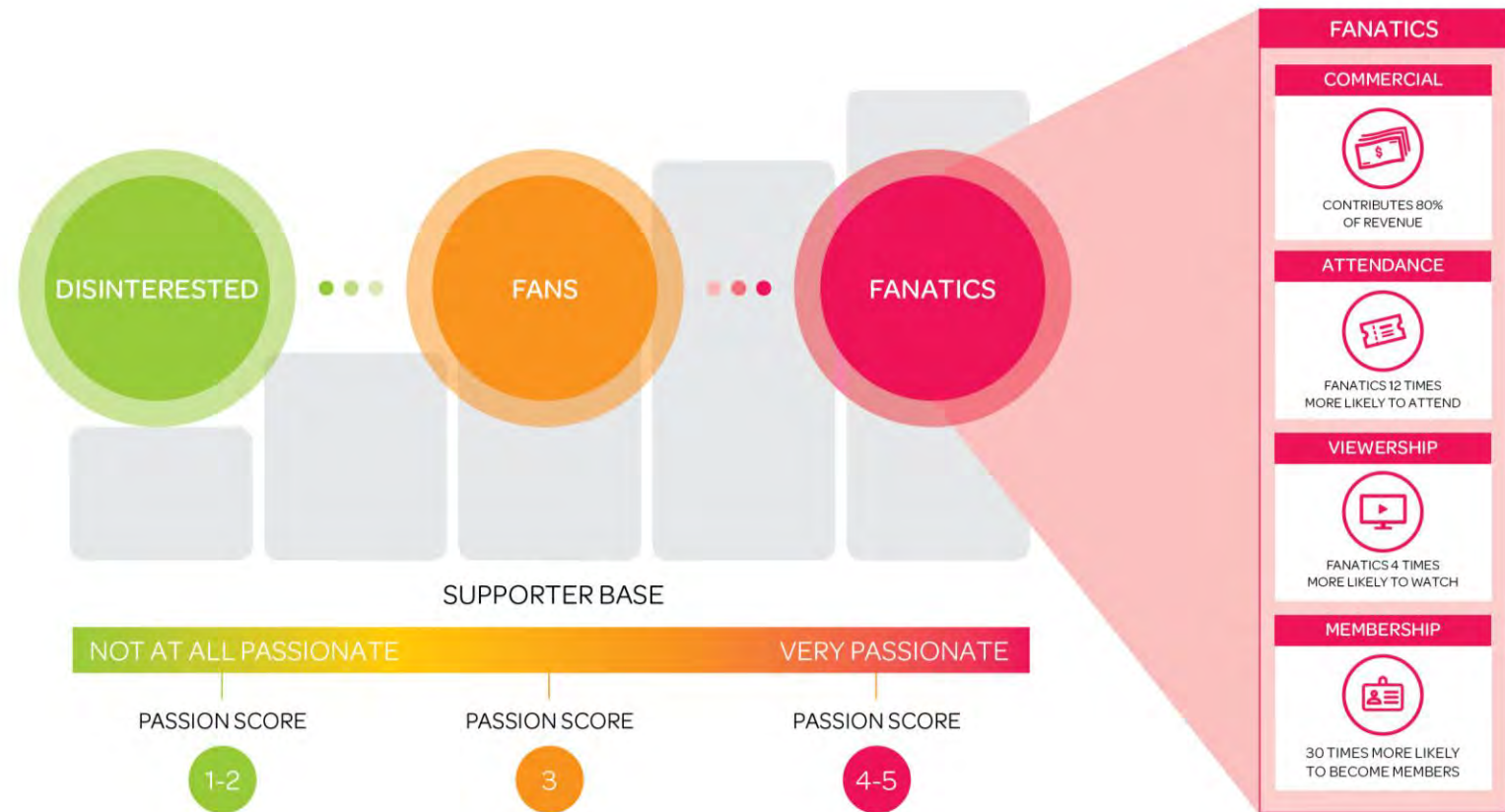
FAN FOCUSED. RESULTS DRIVEN.

APPENDIX

Fan Base Sizing Methodology

Gemba uses passion as a metric for gauging the level of engagement consumers have with a variety of sport and entertainment properties

FAN BASE SIZING METHODOLOGY



Fanatics are the most important members of the sporting ecosystem as they represent approximately 80% of the revenues for all major sports through consumption and attendance

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