

## SAILING

### Definition

Sailing tourism refers to any holiday where the main purpose of the trip is to sail or learn how to sail. Sailing tourism has two broad categories, which are defined by the type of boat used: a yacht (which is also used as overnight accommodation) or a dinghy (a smaller boat without berths – therefore overnight accommodation is on land).



Yacht sailing holidays tend to be either *bareboat charters*, where the boat is hired – without crew - and can be sailed to any chosen destination, or *flotilla*, where all boats in the flotilla follow a pre-planned route. Dinghy sailing holidays are most likely to be combined with a sailing course.

### Estimate of Global Market Size

As with most niche markets, there are scant data available regarding the sailing tourism sector. However, it is estimated that around 10 million sailing holidays are taken each year. An estimated 2.5 million trips are taken by residents of the United States, with an additional 1 million by residents of the United Kingdom.

### Potential for Growth

Sailing holidays have been exhibiting significant growth over the past 10 years. This growth shows no signs of abating, with an increase in the desire for more active holidays.

There is also increasing interest in sailing as a short-break, and as a multi-centre trip (which combines sailing and some other land-based activity).

Groupe Beneteau (the leading sailboat builder) is planning for long-term growth. In the short term, growth trends are likely to be boosted by China's rapid economic expansion, which will be further intensified by the Beijing Olympics in 2008.

### Brief Profile of Consumers

Sailing holidays are available to a wide range of consumers. Little or no experience is needed, although to participate on a yachting holiday a minimum qualification is required. For dinghy sailing, no qualifications are required at all.

However, sailors tend to be from higher socio-economic groups and are skewed towards males rather than females. Dinghy sailing appeals to the younger age groups with the 16-34 group dominating this market, whilst yacht charter consumers

tend to be aged 55 and over.

Flotilla holidays are growing in popularity, and families with teenage children are driving this market. This group will exhibit strong growth over the next 10 years, as will the increasingly active 55+ age group.

### **Main Source Markets**

The main source markets for sailing are:

- United States
- United Kingdom
- France
- Germany
- Italy
- Scandinavia
- New Zealand
- Australia

The major sailing source market is the US, followed by European countries.

### **Emerging Markets**

- Russia
- China
- Japan

### **Main Competing Destinations**

The principal competing destinations for the sailing market are:

- The Mediterranean (primarily Greece)
- Australia
- Seychelles
- Hawaii
- United Kingdom
- Turkey
- Maldives
- Thailand
- Vietnam (rapidly emerging destination)

### **Key Tour Operators**

First Choice owns the two biggest sailing companies in the US and the UK: Moorings (in the US) and Sunsail (in the UK). Moorings and Sunsail combined have the largest fleet of yachts in the world with around 1,000 yachts each (most with 4 to 8 berths). Both operators offer bareboat and flotilla options to their clients.

#### ***Sunsail***

United Kingdom

<http://www.sunsail.co.uk>

The Port House, Port Solent, Portsmouth, Hampshire, PO6 4TH

Tel: 020 9222 2300

E-mail: [yachting@sunsail.com](mailto:yachting@sunsail.com)

**Moorings**

United States

<http://www.moorings.com>

19345 US Highway 19 N#4, Clearwater, FL, 33764-3147

Tel: 888 952 8420, 727 535 1446.

**Sailing Holidays**

United Kingdom

<http://www.sailingholidays.com>

105 Mount Pleasant Road , London NW10 3EH.

Tel: 020 8459 8787

**Neilsen**

United Kingdom

<http://www.neilson.co.uk>

Locksview, Brighton Marina, Brighton, BN2 5HA

Tel: (+44) 870 333 3356

Fax: (+44) 870 909 9089

**Mark Warner**

United Kingdom

<http://www.markwarner.co.uk>

20 Kensington Church Street, London, W8 4EP

Tel: (+44) 871 703 3887

**Yacht Hire & Charter**

Australia

<http://www.yachthireandcharter.com>

2 / 1 Balmoral Street (P.O. Box 1518) Frankston, Victoria, 3199

Tel: within Australia (+61) 3 8781 1155

Fax: (+61) 3 8781 1159

Email: [enquiry@yachthireandcharter.com](mailto:enquiry@yachthireandcharter.com)

**Key Points for Marketing and Distribution**

Key forums for marketing and distribution include yachting magazines (although many of these focus purely on equipment). National broadsheet newspapers in the key source markets offer other good opportunities due to the close demographic match between their readership and the sailing consumer. Direct promotions with yacht/sailing clubs in main source markets can also be effective.

*United States: Yachting Magazine*

<http://www.yachtingmagazine.com>

*United States: Sailing Magazine*

<http://www.sailingmagazine.net>

*United States: Soundings*

<http://www.soundingspub.com>

*United Kingdom: Yachting World*  
<http://www.ybw.com>

*United Kingdom: Times - travel section*  
[http://travel.timesonline.co.uk/tol/life\\_and\\_style/travel](http://travel.timesonline.co.uk/tol/life_and_style/travel)

*United Kingdom: Telegraph - travel section*  
<http://www.telegraph.co.uk/travel>

*United States: New York Times - travel section*  
<http://travel.nytimes.com>

*United States: Washington Post - travel section*  
<http://www.washingtonpost.com/wp-dyn/content/artsandliving/travel>

*United States: Wall Street Journal - travel section*  
[http://online.wsj.com/personal\\_journal/travel](http://online.wsj.com/personal_journal/travel)

*Germany: Faz Frankfurter Allgemeine Zeitung*  
<http://www.faz.net>

### **Social Networks**

*Sailing Networks*  
<http://www.sailingnetworks.com>

*AllSailors.com*  
<http://www.allsailors.com>

### **Trade Fairs**

For an extensive list of boat shows see the following link:  
<http://www.nmma.org/calendar/boatshows.aspx>

## **Additional Information**

### **General Information**

*National governing body of Sailing in the United States*  
<http://www.ussailing.org>

*Sailing publication: Information about sailing*  
<http://www.worldwidesailing.net>

*United Kingdom: Royal Yachting Association*  
<http://www.rya.org.uk>

*American Sailing Association*  
<http://www.asa.com>

*Sailing Blogs: Sailing forum*  
[http://www.sailblogs.com/member\\_list.php](http://www.sailblogs.com/member_list.php)

*International Sailing Federation*

<http://www.sailing.org>

***Organisations/Institutions in the Caribbean***

*Caribbean Sailing Association (CSA)*

<http://www.caribbean-sailing.com>