

2018

RYA Northern Ireland Club Census

Northern Ireland
Insights Report

3/7/2019

RYA Club Census 2018 – Northern Ireland Insights

Introduction

RYANI's strategy was launched in April 2017 and it sets out its purpose and mission for the period 2017-2021:

- To promote and protect safe, successful and rewarding boating in Northern Ireland.
- Be more tailored in everything we do in order to increase our relevance and value to members, affiliates and stakeholders¹.

Our RYA Club Membership Census is an annual survey of the RYA Affiliated Club network. First conducted in 2013, it helps us to understand the current capacity and health of the nation's sailing club network. This, in turn, helps the RYA to better focus its resources towards the clubs most in need of RYA support.

The Census collects a variety of information from clubs that provides us with insight for each of the home countries and England's regions.

In 2018, 30 of 34 clubs based in Northern Ireland completed the census, a response rate of 88%.

This report for RYANI covers:

- Membership - total number of members in clubs, nationally and by region.
- Number of family memberships and juniors.
- Diversity of membership – gender, ethnicity and disability.
- Changes in membership over the past two years, and perceived reasons for the change.
- Retention and growth - the number of new club members and those not renewing membership.
- The membership capacity at the club, capacity limitations and aspirations.

The report is structured in 3 sections:

1. Membership levels: club membership totals and trends for adults and juniors.
2. Participation and diversity: who are our participants and how active are they?
3. Perceptions of change and potential for development.

¹ <http://www.rya.org.uk/rya-regions/rya-ni/about-us/Pages/strategic-plan.aspx>

1. Membership Levels

Census insight can help us understand the current picture of membership in Northern Ireland and the trend in membership levels over the past five years. Where applicable, comparisons are made with the other Home Countries. Census responses help us track feedback from our club network and understand how our members are engaging in our sport.

Membership Highlights

Our estimated total membership stands at **9,474** members in 2018, an increase of almost 450 since 2017.

Club membership levels have fluctuated since 2013.

The average club size is **278** members.

There are over **1,100** family members **13%** of the total.

Almost **1,900** junior club members form **23%** of total membership.

87% of clubs have junior members.

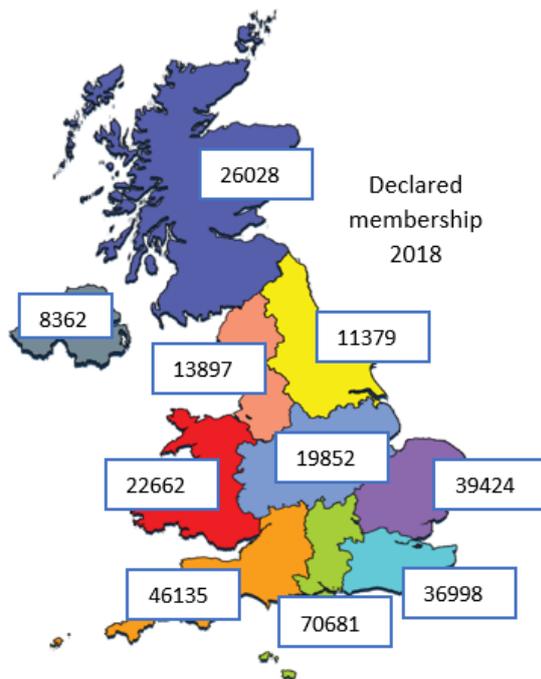
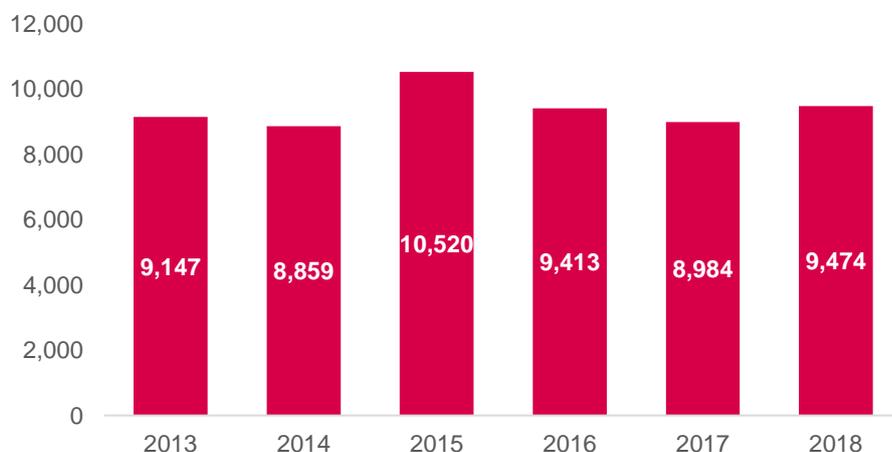


Figure 1 below shows the overall trend in the numbers of club members in Northern Ireland from 2013-2018. To best understand the full membership picture, an estimation of potential membership is calculated annually, using Northern Ireland's average club size as a proxy figure for each non-responding club. This process is used across England and Scotland.

Figure 1: Total Club Membership 2013 to 2018



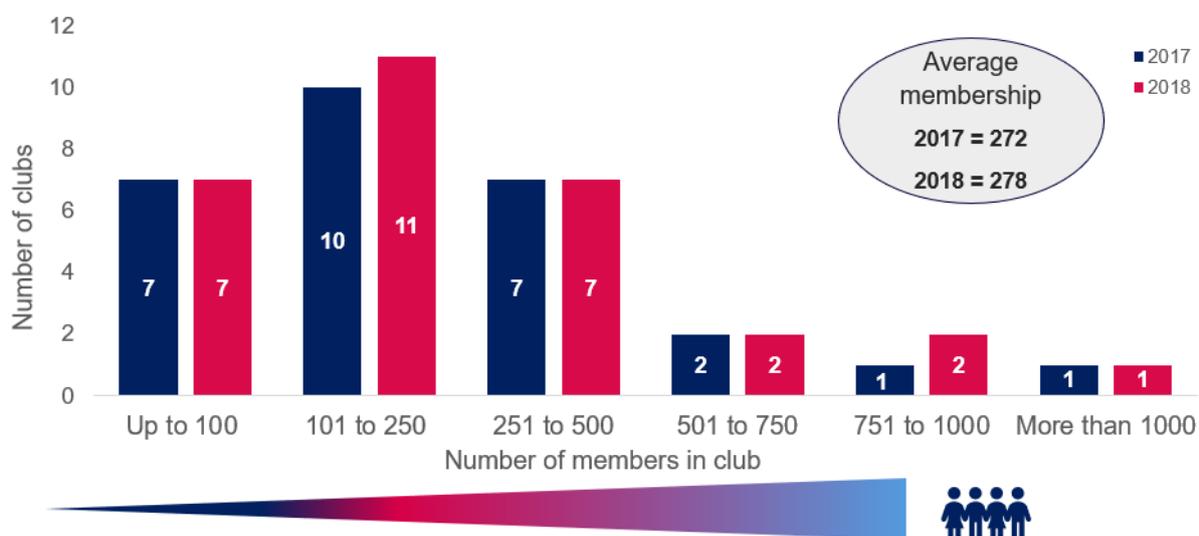
In 2015 only ten clubs responded, therefore estimating total membership is unreliable. A five year average (293) was thus applied to 2015 for the 2017 report.

Since 2013, membership has fluctuated around 9,000 members. As in 2017, this year's data is likely to present an accurate picture, with almost all clubs taking part in the census. Reasons for increased and decreased membership are discussed in Section 3 below.

Club Size

The average club in Northern Ireland is 278 (272 in 2017) – smaller than England and Wales but slight larger than clubs in Scotland. Clubs vary greatly in size and the distribution is shown in Figure 2.

Figure 2: Distribution of Club Membership in Northern Ireland



Family and Junior Membership

Most clubs in the UK offer a family membership option – only 6 clubs in Northern Ireland reported having no family members, the same as in 2017. Family members account for 13% of the total. Family membership in 2018 stood at 1,106, a slight increase from 1,038 in 2017, but an increase from 2016 where there were 621 family members in 18 clubs who responded to the survey.



Junior membership proportions are slightly higher in Northern Ireland – juniors form 23% of our total membership compared with 13% in Scotland, 14% in Wales and 16% in England. Reported junior membership has increased from 832 junior members (from 18 clubs) in 2016, to 1,399 in 2017 to the current 1,890.

Over four fifths of clubs (87%) have junior members. Only four clubs had no juniors registered in 2018 – three of these clubs also had no family memberships recorded.

Alternative Membership Options

Developing a flexible membership structure and range of options may help retain and attract more members to clubs. Nine of our clubs had a group or associate membership option, with 162 associate members between them.

Since 2017, clubs have been asked if they were registered as Community Amateur Sports Clubs (CASC), meaning they may benefit from a range of tax relief options². Only 3 clubs had registered in Northern Ireland in 2017, and 2 in 2018 - a similar picture to Wales (7 clubs and 9 clubs respectively) but lower than Scotland and England where 22% and 20% of clubs respectively are registered as a CASC.



² <https://www.gov.uk/government/publications/community-amateur-sports-clubs-detailed-guidance-notes>

2. Participation

In this section, we report on the proportions of people participating in the sport by gender, ethnicity and disability. Across the UK, a key focus for National Governing Bodies is to ensure that the diversity of membership is considered.

Participation Highlights

Overall, **36%** of our members are female (38% in 2017).

Juniors have a more equal gender balance. **47%** of junior members are female.

4% of members (325) have a disability.

2.2% of members are Black, Asian or from a minority ethnic group.

There are over **3,636** 'active' members – those who take part at least 13 times a year.

43% of our members are 'active' – a decrease from 50% in 2017.

'Targeted diversity' is considered within RYA's overall strategy which includes more Black, Asian and Minority Ethnic (BAME) role models and Sailability targeted by impairment group.

With the census now collecting valuable information on ethnicity and recording the proportions of members with a disability as well as gender, this data provides an important addition to the picture of accessibility and demand for diverse communities across Northern Ireland and the UK.

RYA Northern Ireland is committed to the principle of equality of opportunity and aims to ensure that all present and potential participants, members, instructors, coaches, competitors, officials, volunteers and employees are treated fairly and on an equal basis, irrespective of their gender, age, disability, ethnic origin, colour, religion or belief, social status or sexual orientation.

RYA Northern Ireland aims to make its services and training schemes accessible to all and may take special measures to ensure that certain groups are not unfairly disadvantaged, provided that such action does not adversely affect the standard, quality and integrity of its schemes.

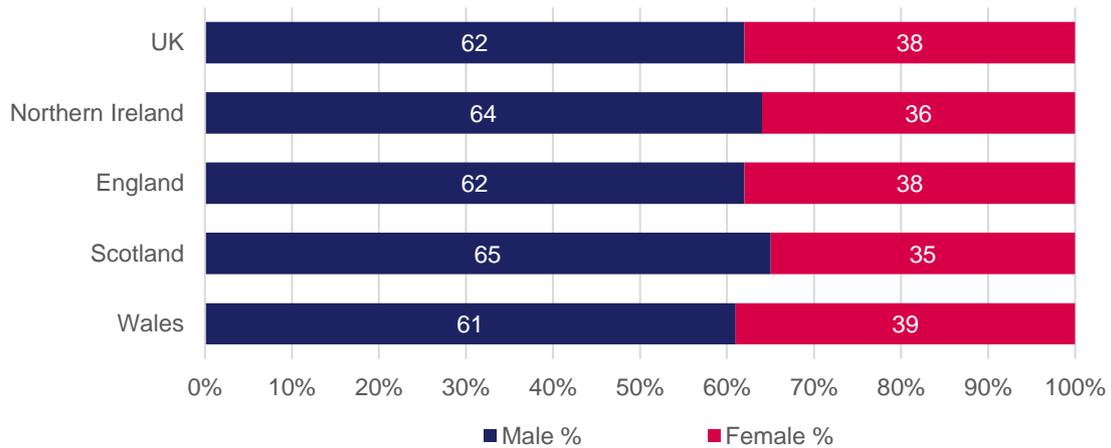
Gender

In 2017, the overall gender split was 62% male and 38% female and in 2018 is currently 64% male and 36% female. This split is similar pattern to the rest of the UK.

Although a gender imbalance in membership is apparent, RYA Affiliated Clubs have a slightly better female representation than that of sports clubs in general. The Sport and Recreation Alliance's 'What's the Score' club survey found that a typical sports club is made up of 70% male and 30% female members.

Figure 3 below shows the percentages of male and female members for Northern Ireland and the other Home Countries of the UK.

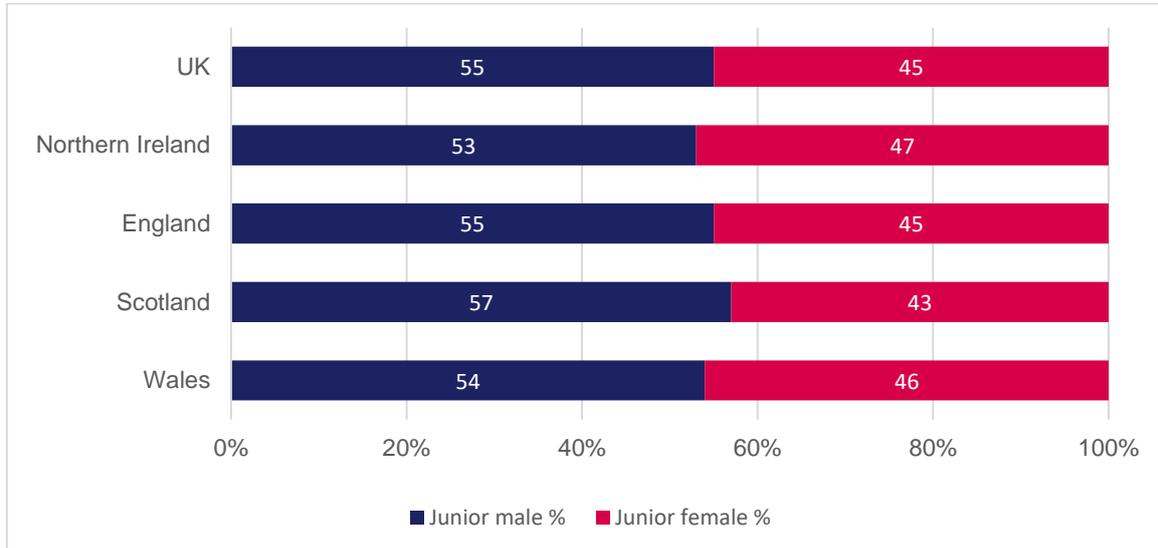
Figure 3: Membership and Gender 2018



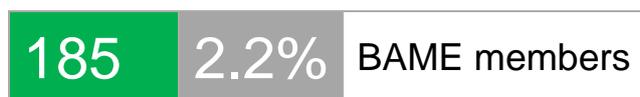
Junior Membership and Gender

Encouragingly, the gender balance for juniors is more equal than adults, and a positive picture in comparison with many sports that have small percentages of female participants. In Northern Ireland, 47% of junior RYA club members are female and 53% are male. The other Home Countries of the UK have similar proportions.

Figure 4: Junior Membership and Gender in 2018



Ethnicity



In many sports, ethnic minority groups are underrepresented in clubs, as coaches and volunteers and within the sporting workforce. The 2018 census asked clubs to estimate the proportion of their members who were from Black, Asian and minority ethnic groups.

Overall, the proportion of BAME members is generally very low. In Northern Ireland the figure is 2.2%, a slight increase from 1.9% in 2017. In Scotland, 0.76% are BAME, England 2.4% and Wales 2.6%.

Disability



Our club census found we have an estimated 4% of RYA Northern Ireland club members with a disability, compared with the estimate of 5.4% in 2017. This is the equivalent of 325 members, a decrease from 409 members in 2017.

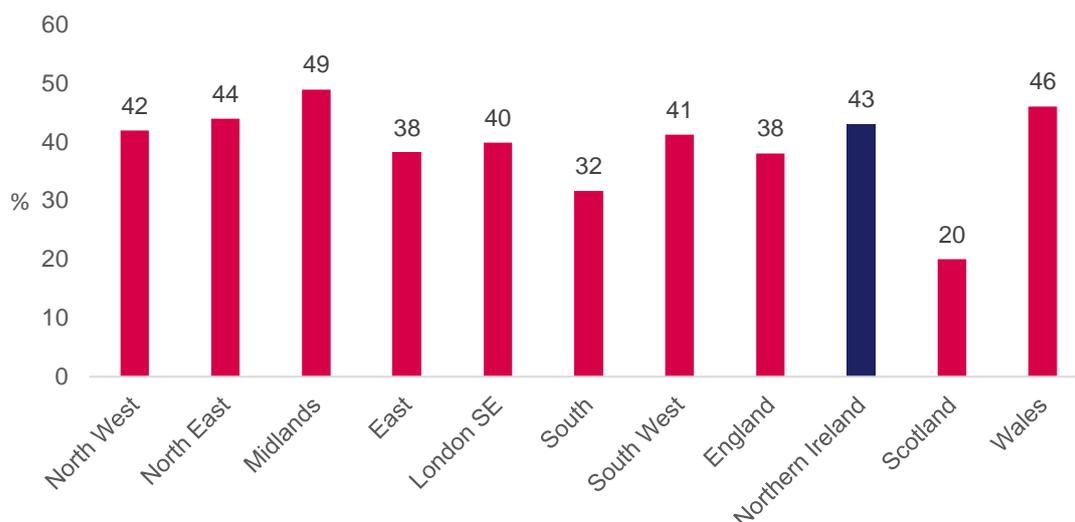
Active Participation

The importance of physical activity and the benefits it can have on physical and mental health and well-being continues to be prominent across the UK. Importantly, the census captures the number of 'active' members – those who went sailing or boating more than thirteen times in the past year. This not only provides a good indicator of the level of engagement members have with the provision the club is offering, but also provides us with some insight into the contribution of the sport to general physical activity levels in the population.

Our club census asks respondents to estimate the percentage of members who participated in any boating activity more than 13 times in the last year. Our clubs estimated that 43% of their members fall in this category, equating to **3,636** active members, a decrease from the estimated 50% of 2017.

On average, 37% of members in the UK are active. Figure 5 shows the regional variations.

Figure 5: Active Participation across the UK



3. Perceived Change and Potential for Development

Each year, the census asks club representatives whether they feel their membership has increased, decreased or stayed the same over the past two years. As information builds up over time, we can track the direction of travel and any changes in issues affecting clubs. This section discusses these perceptions and considers the potential for developing the membership offer and increasing the number of people who are involved in the sport.

Change and Potential - Highlights

15 clubs say their membership increased and **11** say it decreased since 2016.

Ageing membership and **reduced time available** are the predominant reasons given for membership decreases.

A **lack of volunteers** is the main reason limiting growth, along with facility limitations.

Club membership retention is high – **92%** renewed their membership in 2018.

We have scope to cater for **3,722** more members.

Top 5 reasons for increases - NI

Better marketing of the club
Word of mouth advertising
Investment/development of facilities
Increased junior/youth programme
Reduced membership fee

Top 5 reasons for decreases - NI

Ageing membership
Reduced time available
Difficulty/unable to attract younger members
Lack of personal development / sailing opportunities with club
Change from family to individual membership

In 2017, only six clubs reported that their membership has increased in the last two years. 13 clubs felt membership was decreasing. In 2018, we saw a more positive picture, with 15 clubs reporting an increase and 11 seeing a decrease.

Reasons for increases and decreases across the UK have been tracked since 2013, and this information is important as it helps us understand barriers to growing and diversifying the RYA membership base.

The top five reasons given for both increases and decreases seen in membership levels have generally been consistent since 2013, and findings are similar across the UK. Issues affecting clubs in Northern Ireland, although reported by a small number of clubs, are like those affecting clubs in the other home countries.

Increased Membership

Increases generally arise from better marketing, word of mouth advertising and recommendation, and this year from investing in or developing facilities and development. An increased focus on the junior and youth programme and offering reduced membership fees also had an effect.

Decreased Membership

Reasons for decreases in membership are often difficult to address. Lack of time and income are common across many leisure and sports pursuits, and ageing membership can be viewed both positively and negatively – negative in that newer younger members are not being attracted to the sport in the proportions required to maintain club size, but positive in that the sport is one that offers a lifetime opportunity and may not suffer from ‘drop out’ as much as other activities.

There are only four clubs in Northern Ireland with no junior members, and junior membership forms less than 10% of total membership in just nine clubs (30% of those responding to the census). An increasing focus on juniors may help to combat some of the issues cited by those clubs that had decreasing membership levels.

Reasons for decreases were also linked to facility issues and lack of capacity, and factors outside of the club’s control. Some clubs commented on how there was competition for members nearby, or competition from other sports for juniors.

‘Static’ Membership

Only four of our 30 responding clubs reported that their membership had stayed the same over the past two years. Across the UK, reasons given by clubs whose membership stays the same included:

- Natural churn – some leavers replaced with similar amounts of joiners.
- The club is at maximum capacity for the facilities available.
- Family memberships are the core of the club and these are stable.

Membership Potential

Facility limitations are clearly an issue that can hinder membership development, but the main barrier cited by clubs in Northern Ireland (and this is no different to the rest of the UK) is a lack of a supporting workforce - paid or unpaid – to help maintain and increase the level of existing provision.

The 2017 club census found that almost four fifths of clubs (79%) said the ‘number of people willing to volunteer’ was a barrier to increasing their membership. In 2018, this had fallen to 47% of clubs – 14/30 gave this as a factor limiting growth. Although support from volunteers may have improved, it remains a key area for the sports sector to address. Figure 6 shows the factors that limit clubs’ ability to increase their membership levels.

Figure 6: Factors affecting Clubs in 2018

Reason	Number of clubs 2018
Number of people willing to volunteer to run the club and activities	14
Availability of equipment (safety boats, club boats etc.)	11
Facilities - amount of boat parking available	10
Facilities - size of club house	4
Size/depth of water available to club	4
External factors (restrictions by landlord, terms of lease)	3
Facilities - number of moorings	2

Membership Retention

Understanding the level of ‘churn’ and membership retention can help us assess the capacity and potential for growth. The churn rate is the proportion of people leaving a club as a percentage of overall membership. The churn rate in Northern Ireland was 5.7% in 2017 and 7.98% in 2018, slightly higher than Wales but lower than England and Scotland. The churn rate and relatively small proportion of leavers suggests we have a strong core membership base who are happy with their experience.

Figures 7 and 8 show the proportions of leavers, joiners and churn rate for Northern Ireland and the other Home Countries of the UK in 2018.

Figure 7: Membership Retention 2017-18 – numbers leaving and joining clubs

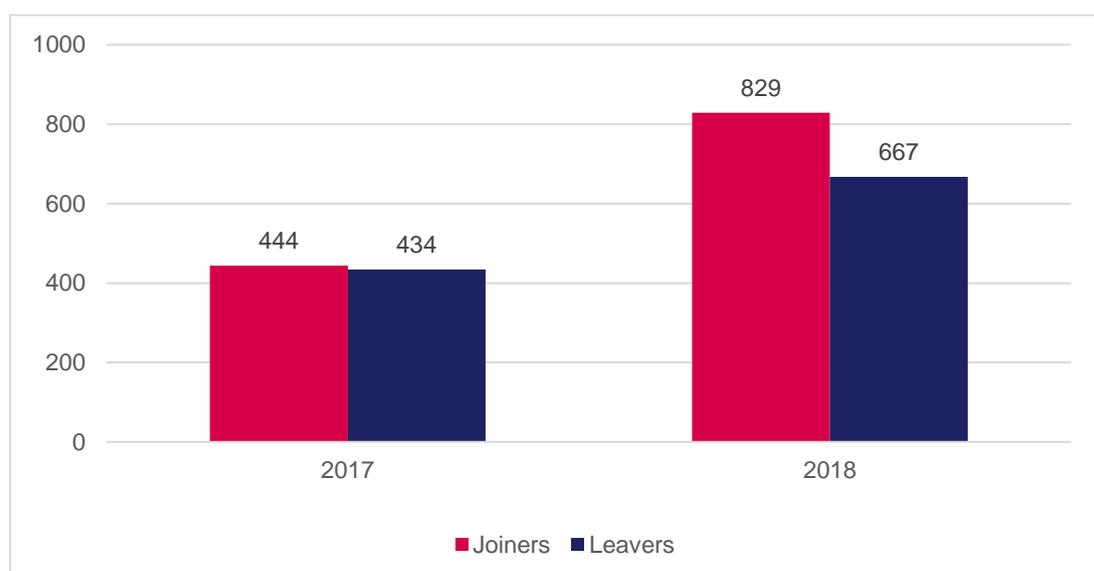
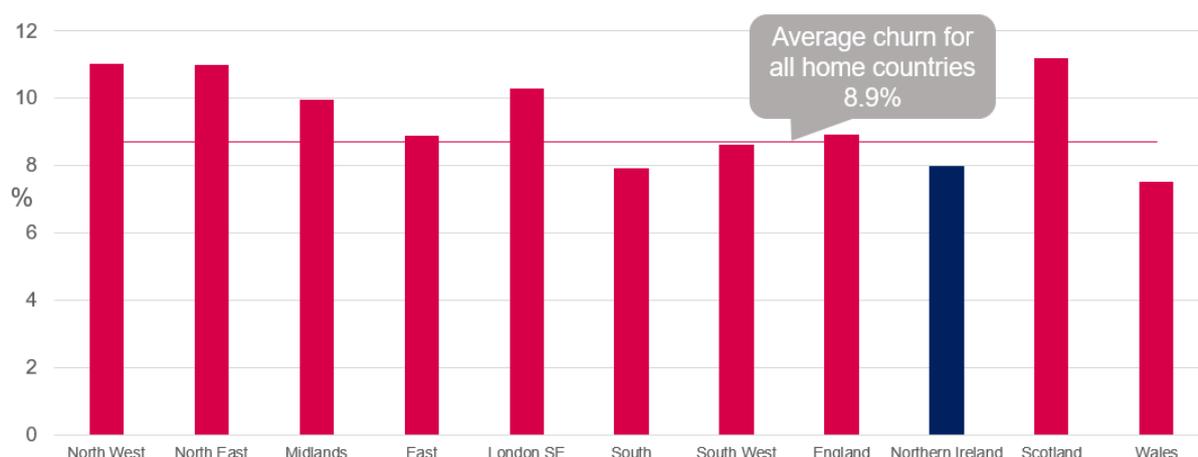


Figure 8: Churn Rate by Region 2018



Capacity for increasing membership and participation levels

In 2017 RYA Northern Ireland clubs reported there was 37% capacity spare - or around 4,500 membership spaces left. The maximum number of members that RYA Northern Ireland clubs might hope to cater based on these assumptions is over **12,100** members. This has fallen in 2018 – we have 32% spare capacity across Northern Ireland with around 3,722 spare places. The maximum number of members we could cater for on this basis would be **11,490**.

22 of 30 clubs (73%) say they want to increase their membership – a reduction from 82% recorded last year, but still a high proportion. Providing a flexible membership structure and adapting the current offer to attract more juniors is a potential means of addressing this goal.

Summary

A continuous challenge for us all is to work towards growing and developing the number of people who regularly participate in this fantastic sport. This means introducing potential new participants and to kindle their enthusiasm for the sport via the provision of training and support in a high-quality environment. Alongside this we need to be mindful of the evolving requirements of our current members to mitigate the possibility of drop out.

The census information will help us monitor progress and shape our bids for further resourcing - which allows us to continue to support clubs and promote sailing and windsurfing to a wider audience. Clubs may find it useful to consider what they offer in the context of the information presented within these Insights, as this will lead to sustained and ultimately increased membership and participation.

On behalf of RYA Northern Ireland, we would like to ‘thank you’ for your involvement in these projects to raise awareness of our sport and for taking the time to respond to the surveys. Your involvement and input are invaluable.