

Shaping the Future of Sailing at the Olympic Games

Transforming the next 20 years of sailing

October 2022



Context: The sport of sailing must improve to address the expectations set by the IOC

Sailing has several challenges it must address...

- ① **Marketability:** Sailing does not perform well in terms of viewership and broadcast statistics (SportOnSocials ranks World Sailing 34th out of the 40 IFs)
- ② **Sustainability:** The IOC is beginning to place more focus on sustainability amid climate change and pressure to decarbonize sport. Historically the IOC have not tracked CO2e, but the IOC's LA2028 questionnaire to IFs includes a section on sustainability¹, indicating these issues are moving up the IOC's agenda.
- ③ **Accessibility:** Whilst Emerging Nation participation has increased 2000-2020, there are a large number of countries in the long-tail with single digit participation, and many MNAs do not have any representation at the Olympics; once the selected ENP athlete stops, growth is difficult to achieve
- ④ **Diversity:** Whilst the athlete quota system has ensured gender parity at the athlete and medal event level, ethnic and economic diversity can be improved amongst athletes, coaches and officials. Beyond the athlete quota, the overall sport's pipeline of talent should strive for greater female participation and social and racial diversity

...and World Sailing has committed to review action steps that it can take

The IOC has **categorized sailing in group D**, meaning that the sport receives **less investment**, and faces **more pressure to reduce athlete quota places** and/or number of **medal events**, as part of the IOC's broader drive to **reduce the cost and complexity** of delivering the Games

World Sailing is the globally preeminent sailing organization and has taken the initiative to conduct a research effort to generate ideas for what actions it can take

1. As part of the LA2028 questionnaire, information is collected against 6 sustainability criteria: carbon emissions, fuel requirements, water demand, water quality, radical reuse & waste, and biodiversity & natural resources

Executive Summary

Sailing is at an inflection point and has several areas it must address to thrive as an Olympic sport going forward

This report reviews four key dimensions - Marketability, Sustainability, Accessibility, and Diversity - and identifies several opportunities to improve the sport's overall performance in the context of the Olympic Games

Going forward, to build momentum as an Olympic sport and achieve its goals, the sport's **most urgent priority is in Marketability**. The structure and competitive format must evolve to attract a strong followership across media channels. **Olympic Sailing should aspire to: be easy to find and to watch, generate excitement and attract a broad range of viewers (not only elite sailors), exemplify skill & athleticism, and create stars that fans want to follow.** By undertaking several of the recommended actions to improve its marketing, the sport will likely also improve its performance in other dimensions

In the other dimensions – Sustainability, Accessibility, and Diversity – **the sport has made substantial progress to deliver on previously defined goals, yet there are additional opportunities to consider**, described as follows:

- **Sustainability:** commit to making changes at the international level for activities that contribute most to the environmental footprint for this sport; particularly travel-related (e.g., number of support staff flying, concentrate events geographically) and fuel use at regattas (e.g., use of technology such as electric coach boats, remote umpiring, mark laying drones, etc.)
- **Accessibility:** continue growing the number of MNAs and attract and retain a larger base of athletes to compete at the international level (and Olympics) across classes, through continued cost reduction measures and purposeful class selection
- **Diversity:** recruit and train more diverse coaches and other support staff, build the foundation at “grassroots” level for diversity, including targeted education programs to train women in race official and umpiring roles

Agenda

1. Marketability





























2. Sustainability

3. Accessibility

4. Diversity

Appendix

The current competition format of Olympic Sailing faces challenges in “marketability” relative to other sports

Dimension	Olympic sport			
	 Sailing	 Rowing	 Swimming	 Track & field
Clarity on who is winning the race/event				
Action and suspenseful moments captured (incl. starts, lead changes, finishes)				
Athleticism on display				
Emotion of athletes on display				
Consumable within broadcast time constraints				
Recognition of athlete (i.e. star appeal)				

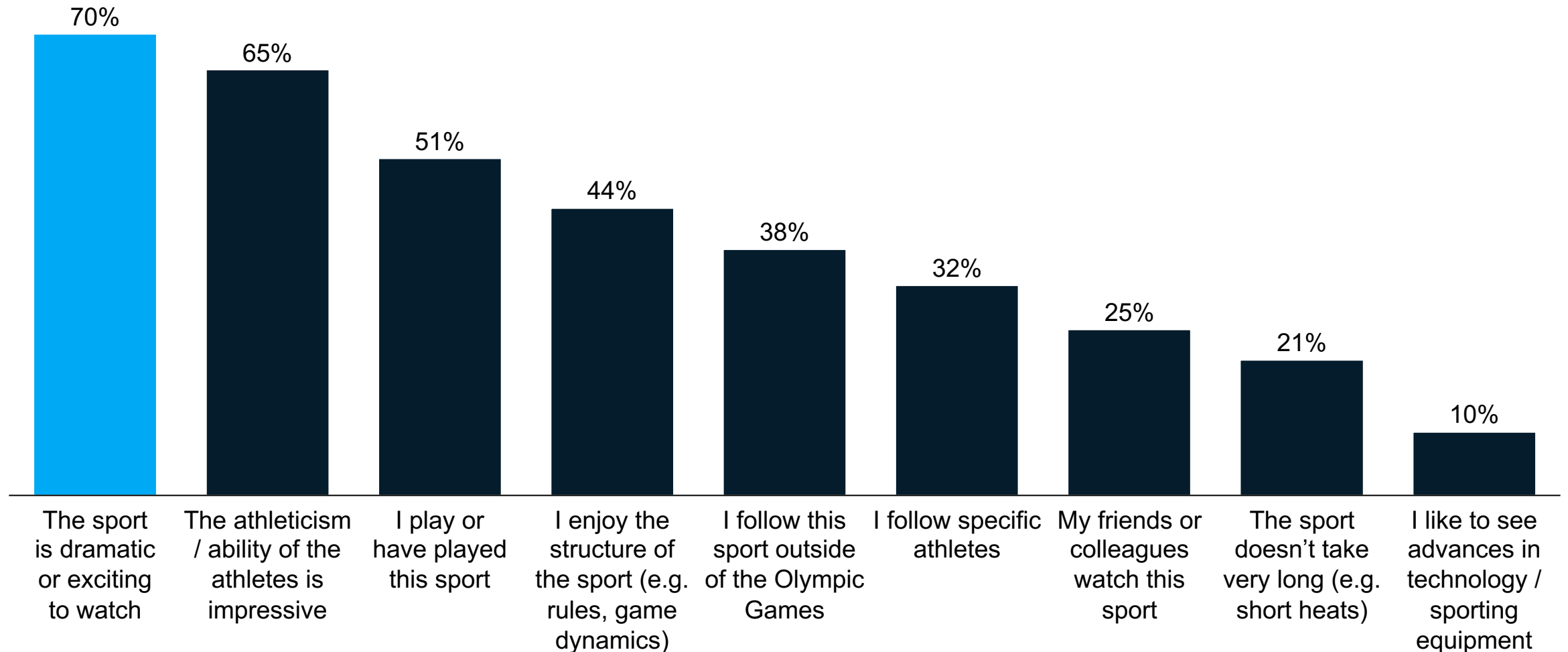
Current competition format

- Fleet racing with X – Y number of boats per class
- Races last between X and Y minutes, with typically Z races held per day
- X races are held per class over 14 days (Y races into total)

Need to populate numbers here

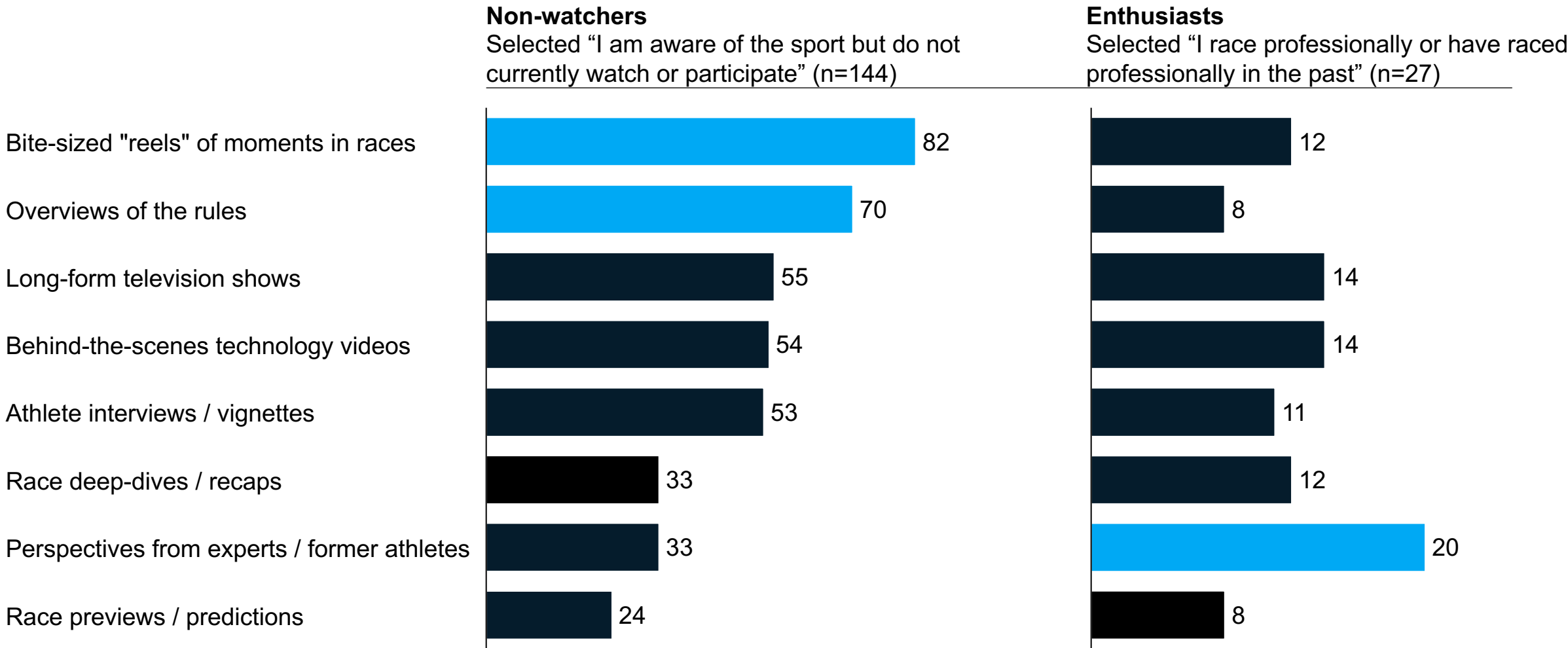
~70% of respondents enjoy Olympic Games events because the sports are “dramatic or exciting to watch”

Survey responses to “Why do you enjoy watching certain Olympic Games events?”

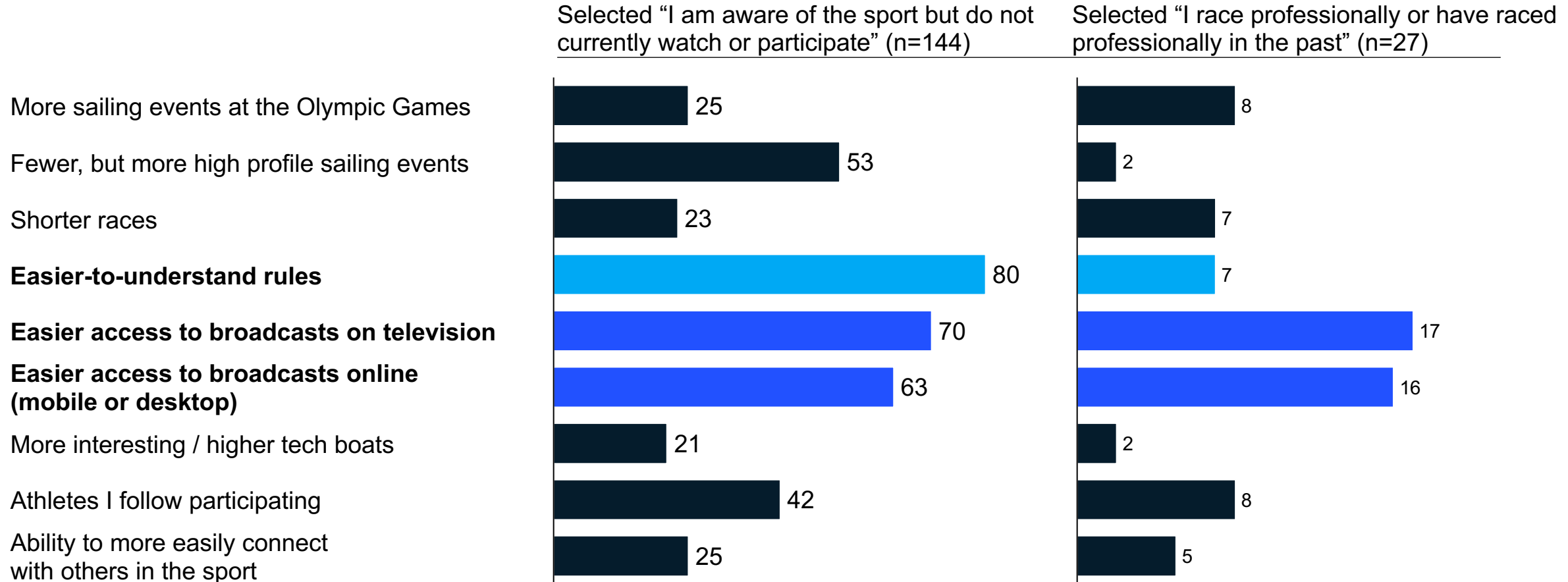


For non-watchers, “Bite Sized Reals” and “Rules overviews” would be compelling content; for professionals, hearing from experts/former athletes would be more interesting

Top answers



For athletes who are “aware of the sport but do not participate,” ease of access and ease of understanding the sport were most likely to encourage them to watch



“Our North Star”

We imagine a future for sailing that ...

- **is easy to find and to watch ...**
- **generates excitement and enthusiasm in participants and viewers alike ...**
- **exemplifies skill & athleticism ...**
- **and creates stars**



Sailing should address specific gaps on the competitive format of to increase the sport's marketability

“Table stakes” for Olympic sailing	Gaps to address
Competition format should excite the viewing audience – beyond the competitive sailor community	<ul style="list-style-type: none">• <i>Competition and individual races are long relative to other sports</i>• <i>Races lack drama/suspense with few decisive moments (e.g., observable lead changes, clear starts etc); winning individual sailing races does not hold special value</i>
The action of the sport must be communicated in a way that is easy for viewers to understand	<ul style="list-style-type: none">• <i>Complex aspects of sport are not consistently communicated in a way that is easy to follow (e.g., upwind sailing, tactics, rules, etc.)</i>• <i>Limited use of visual/tech tools to help explain the sport</i>
The audience must be able to easily find sailing – on television or online	<ul style="list-style-type: none">• <i>Currently, social media engagement in and around the sport is thin</i>• <i>Interested viewers struggle to find and watch the sport quickly and easily</i>
Athlete recognition and number of “stars” is lower relative to other individual sports	<ul style="list-style-type: none">• <i>Track & Field, Swimming, Skiing are similar to Sailing in that the general public does not follow professional competition much between Olympics, yet they create Olympic “stars”</i>• <i>Sailing has low name recognition for its athletes</i>

Increasing the audience engagement is the sport's “burning platform” to sustain its stature in the Olympics

There are several potential solutions to create stronger excitement and engagement with viewers

Guiding principles that could unlock the marketing potential of sailing

- Help viewers understand the sport, including knowing who is winning the race and event
- Increase the proportion of exciting race moments with lead changes or suspense
- Harness the sport's advantages in its aesthetic appeal (wind, water, colorful sails)
- Highlight individual athleticism

POTENTIAL IDEAS TO CONSIDER:

Competitive format changes (could be for preliminaries, with fleet racing for finals):

- Shorter events (fewer days of racing)
- Reaching starts (to create excitement and clarity on who is winning)
- More elimination/knock-out rounds
- Head-to-head racing in a format easier to understand than traditional match racing (e.g., a downwind slalom course)
- Introduce short-course team racing

Innovation in technology and venue:

- Live-action video on-board
- Overhead footage for leader comparisons
- Infield, stadium courses

Class selection (consistent with progress made)

- Fast, athletic, standardized classes that enable close, exciting racing, with simple rigging to reduce cost
- Addition of a potential format/class that allows for accomplished sailors to bring “star” appeal (e.g., most current sailing pros no longer compete, or never competed in Olympic classes)
- Allow for versatility and Olympic “stars” (enabling a sailor to compete in multiple events)

In addition to improving the competitive format, the governing body can take additional actions to make sailing more “discoverable”

The sport can then engage younger, more diverse audiences with new content and across new channels.

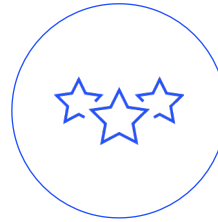
What we need to do	What it looks like	Rationale
1. Increase the drama: bring bite-sized and high-suspense “reels,” focusing on athleticism and decisive moments, to audiences	<ul style="list-style-type: none">• Short videos of pivotal moments in races, starts, finishes, and athlete interviews posted on a variety of channels• Develop narratives of athleticism that are not about personal attributes or individuals.• Tell stories of “star” athletes as exemplars and role models• Create content that sailors can replicate or learn from (performance tips, safety reminders) so they engage	<ul style="list-style-type: none">• Out of a list of eight, the most requested type of sailing content from survey respondents was “bite sized reels of moments in races,” and• Over half of survey respondents who do not watch sailing said “Bite Sized reels” would increase the likelihood of them watching
2. Make it easy to find the product	<ul style="list-style-type: none">• Make it seamless to find and watch Olympic sailing events online and on television	<ul style="list-style-type: none">• Half of survey respondents said easier access to broadcasts would make them more likely to watch sailing at the Olympic Games
3. Tell the story in a fresh way	<ul style="list-style-type: none">• Bring engaging commentary to the live experience• Deploy existing technology to live broadcasts to explain what’s going on• Harness innate advantages of the sport (including key tailwinds such as digitization and enabling technology within the sport; the fact the sport takes place on the ocean and is attractive)• Show the skills of the sport (i.e., athlete actions & decisions) instead of the outcome (i.e., going faster)	<ul style="list-style-type: none">• Complex aspects of sport are not communicated in easily understood ways (e.g. wind shifts, tactics etc)• Commentary is often lacking in both content and entertainment value• Limited use of visual/tech tools to help explain the sport
4. Create a fresh approach to marketing and covering the event	<ul style="list-style-type: none">• Leverage an omnichannel approach across several social media domains to meet viewers where they are at• Develop and cultivate communities of watchers	<ul style="list-style-type: none">• “I watch sailing events on YouTube because the chat commentary from other watchers is better than what the professional commentator can provide”

The governing body should track a set of defined metrics on Marketability



Media engagement metrics during non-Olympic periods

e.g. number of viewers, comments, shares



Olympic Games engagement metrics

e.g. number of viewers across channels during the Olympic Games, qualification attempts by country/gender, participation by athlete & officials



Revenue

A perennial indicator of success

Agenda

1. Marketability

2. Sustainability

3. Accessibility

4. Diversity

Appendix

World Sailing has made significant strides in sustainability which can be shared with MNAs and other IFs to radiate impact

Key World Sailing achievements

Industry-leading Sustainability Agenda published in 2018, which includes 56 ambitious targets, of which 22 have already been achieved, including:

- Being the first IF to achieve and maintain 3rd party certified ISO 20121 (a specification for sustainable events) in 2018

Significant engagement with equipment suppliers on sustainability in order to:

- Understand impact of equipment manufacturing process and key levers to reduce this
- Facilitate sharing of best practice from industry leading suppliers (e.g. Starboard open source LCA as a blueprint for other suppliers)

Engagement with athletes on sustainability issues in order to:

- Gauge support for a variety sustainability initiatives regarding equipment
- Understand athlete equipment usage across the Quad and reasons for high consumption in order to take action

How to further improve

Share best practices with MNAs and other IFs to expand impact of steps already taken

Take direct actions to reduce carbon footprint, including:

- Reducing intercontinental travel where possible
- Decarbonizing equipment at Olympics
- Reducing impact of events and operations

Fundamentally, we need to change behaviour at the international level for activities that contribute most to the environmental footprint for this sport

For individual athletes, World Sailing as an organisation, and WS events, travel is the largest component of carbon footprint

Individual athletes

Depending on athlete nationality and class of competition, air travel could account for **up to 90-95%**¹ of an athlete's carbon footprint

World Sailing organization

An estimated **5700 tonnes of CO2 emissions** per year, of which:

- **55%** business air travel
- **12%** fuels
- **10%** hotel stays

World Sailing events

An estimated **15.1m air miles** were travelled by event participants at the 2018 Aarhus Sailing World Championships

Visiting spectators contribute to the largest proportion of air travel emissions to attend events (41% of estimated CO2e), followed by **athletes** (39%) and **sailing team support staff** (19%)

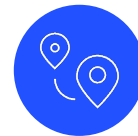
Whilst international competition relies on the travel of athletes to compete, some key levers can be pulled to reduce the impact resulting from international travel



Multiple regattas “wrapped around” a large event; encourage teams to reduce the number of support team members travelling to international event



Recruit and upskill officials locally to reduce intercontinental travel of officials for events



Encourage visiting spectators to travel in a lower impact way (e.g. by train/road for those in neighboring European countries)

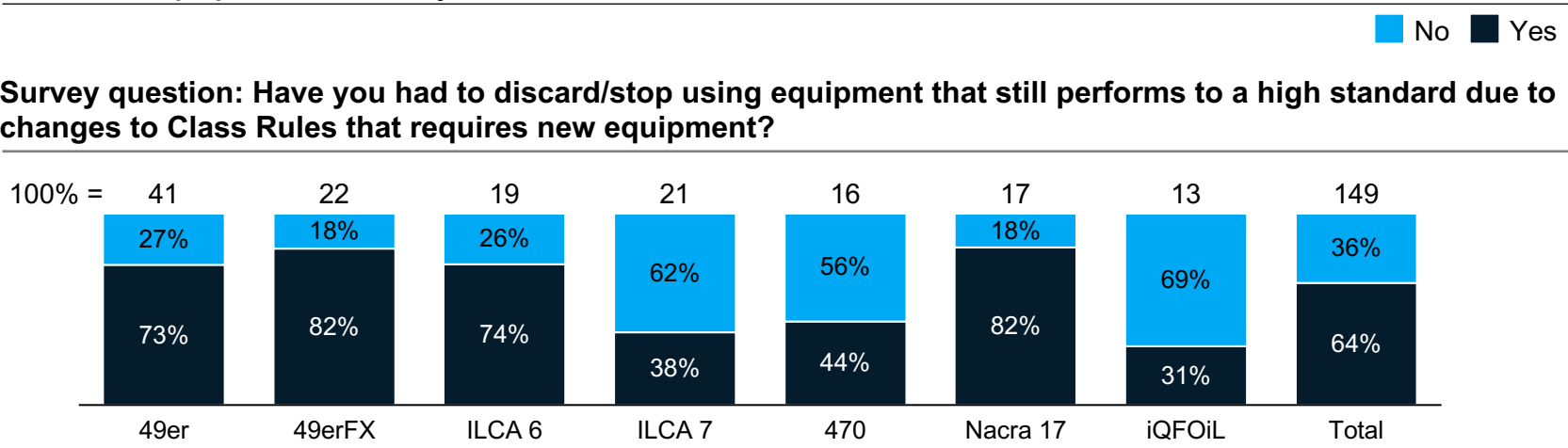


Review qualification process and event venue selection to reduce intercontinental travel

1. Based on estimated carbon footprint of an IQFoil athlete from Oceania. Key assumptions include 1 return flight to each of Europe, North America and Asia per year; and average equipment usage based Kiel Week athlete survey results

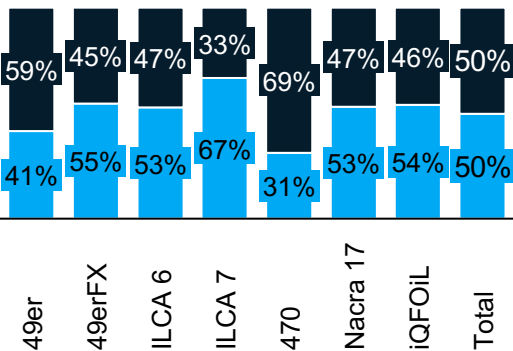
There are several ways in which World Sailing could reduce the environmental impact related to athlete equipment usage

Athlete equipment survey results

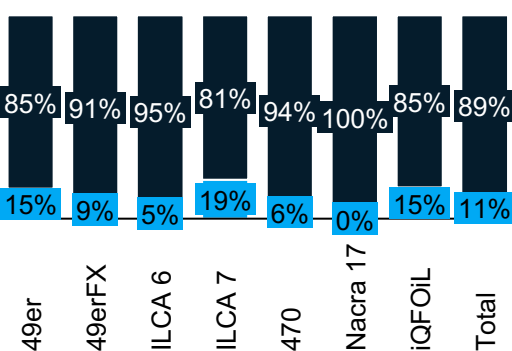


Survey question: would you support the following regulations provided it affected all competitors equally?

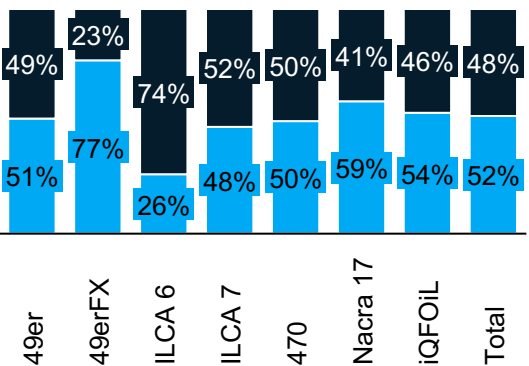
a) Limit the number of pieces of equipment per athlete per Olympic cycle?



b) Use more environmentally sustainable equipment?



a) Use of supplied equipment at events



Key insights

The majority of athletes have had to discard/stop using equipment that still performs to a high standard due to changes to Class Rules that requires new equipment

There is widespread support for introducing sustainability standards for equipment, whilst opinions are more divided for limiting equipment or supplying equipment

Potential levers

- 1 Improve quality of equipment / reduce frequency of breakages
- 2 Set sustainability standards for suppliers (such as minimum recycled content; renewable energy consumption)
- 3 Reduce the number of times class rules change making functioning equipment redundant

Key Decision areas for World Sailing

Sustainability

-
- 1** Competition format and class selection
 - 2** Equipment standards
 - 3** Qualification process
 - 4** Event delivery, including use of technology (e.g. electric coach boats, remote umpiring, mark laying drones etc)
 - 5** Supplied equipment
-

The governing body should track a set of defined metrics on Sustainability

Travel metrics

Number of events, sailors and equipment involved in international travel

Qualifying events and non-qualifying events

Equipment

% of boats using chartered equipment at large international events

Purchase & use of new equipment (e.g. sails)

Event operations & technology

Applications of specific technology to reduce use of motorboat fuel (frequency and impact)

Agenda

1. Marketability

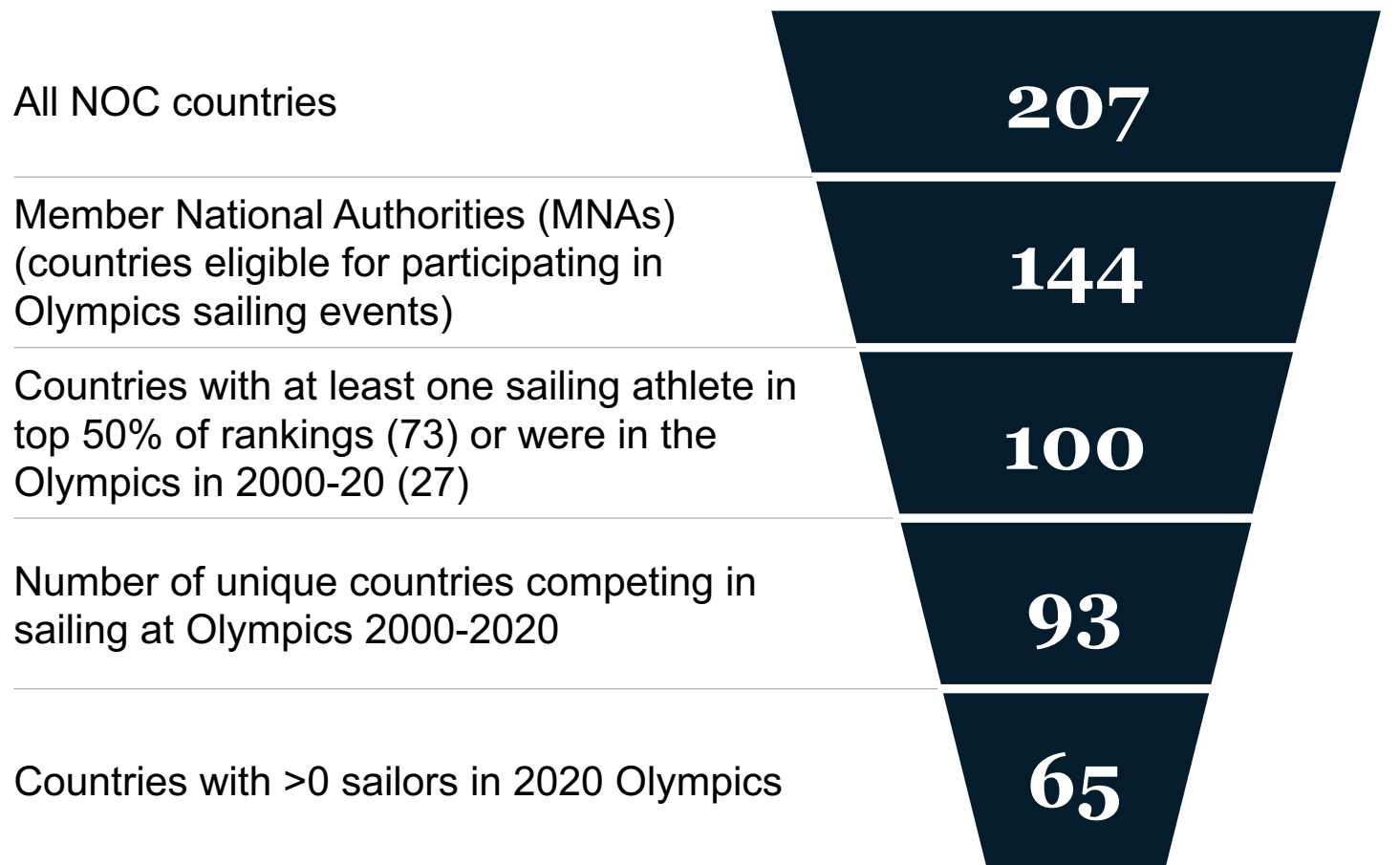
2. Sustainability

3. Accessibility

4. Diversity

Appendix

Two-thirds of eligible countries (or 93 countries) have participated in Olympic Sailing over the past two decades



Challenges for the future

1. How can World Sailing increase the number of MNAs to approach the NOC country total?
2. How can World Sailing help MNAs/ countries that have shown potential to produce Olympic athletes in the past, but only episodically, improve their consistency of participation
3. How can World Sailing encourage the countries that focus resources on only 1-2 classes to support more athletes

While the initiatives so far have yielded results, a broader, sustained approach could expand the reach of the sport

Not exhaustive

Key successes

- Growth in emerging nation participants over 2000-2020 period, particularly from Africa
- Longevity/continuity of the Laser, and universality of the class, has enabled growth in participation
- Fast uptake in new classes, IQFoil and Kite, amongst emerging nations due to lower barriers to participation (cost, infrastructure needs, etc.)



Further improvements needed

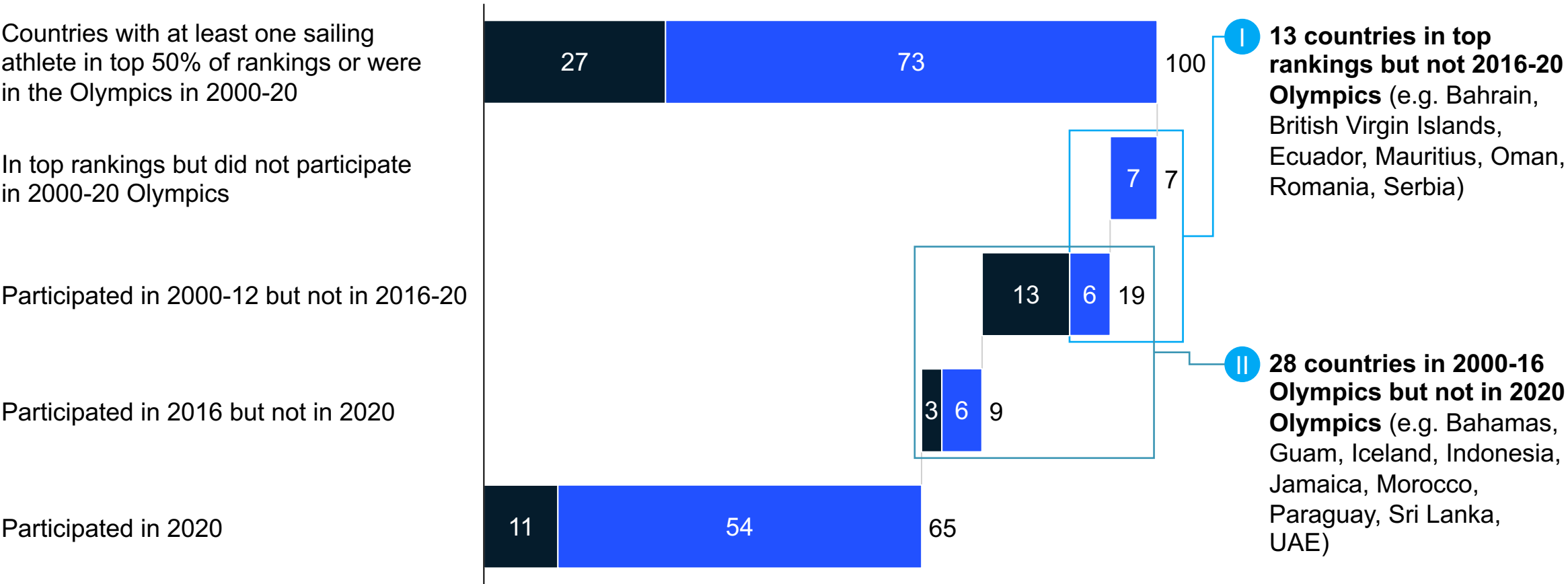
- Attract and retain athletes from a broader range of countries
- Build on momentum and low cost of windsurfing and kiting classes to promote them in emerging countries
- Identify measures to reduce cost burden for other classes (e.g. international event schedule), in line with Sustainability recommendations

To broaden country participation quickly, World Sailing could focus on a short list of countries who have talented sailors, but are inconsistent Olympic participants

Without sailors in top rankings

With sailors in top 50% rankings

Number of countries by sailing ranking and Olympics participation, #



Segmenting countries based on their past participation could help prioritize future support activities

Preliminary

Without sailors in top rankings With sailors in top 50% rankings

Priority group	Priority group criteria	Number of countries	Example countries	Average number of athletes participating in Olympics, 2016-20 average
Sustain	Athlete participation higher than predicted based on the country's intrinsic characteristics	<div><div>4</div><div>43</div><div>47</div></div>	GB, France, Spain, Brazil, USA, Japan, Argentina, Australia, Germany, Italy	<div>7.0</div>
Grow participation	Some athlete participation, but lower than predicted potential	<div><div>10</div><div>17</div><div>27</div></div>	Ireland, Czech Republic, Indonesia, Egypt, Malaysia, Bermuda	<div>1.3</div>
Activate	No athlete participation but medium-high potential (score >35)	<div><div>58</div><div>10</div><div>68</div></div>	Uganda, Madagascar, Senegal, Bahamas, Mauritius, Bolivia, Paraguay	<div>0</div>
Engage opportunistically	No athlete participation and low potential (score <35)	<div><div>62</div><div>3</div><div>65</div></div>	Lesotho, Liberia, Laos, Kyrgyzstan, Tonga, Georgia, Mongolia	<div>0</div>
Total		<div>207</div>		<div>1.8</div>

Note: Segmentation done with a model that predicts participation numbers based on country population, GDP per capita, and share of population living within 10km of the coast; see appendix for more details

Initial Hypothesis on No Regrets Moves and Big Bets

Preliminary

No Regret Moves

- 1** Expand successful emerging country programs to other countries
- 2** Increase flexibility on event participation and move more events to emerging countries
- 3** Reduce the frequency of qualifying events
- 4** Build on momentum and low cost of windsurfing and kiting classes to promote them in emerging countries

Big Bets

- 1** Launch a low-cost class or promote an existing low-cost class to become the new laser
- 2** Launch a series of free to participate events
- 3** Find sponsors to finance participation of emerging country sailors
- 4** Engage with sailors through virtual regatta or other ways to participate in sailing online
- 5** Analyze typical pathways to Olympic classes and offer regional training programs in key development classes, e.g., Optimist

Key Decision areas for World Sailing

Accessibility

-
- 1** Competition format and class selection
 - 2** Support offered to MNAs
 - 3** Event delivery
 - 4** Development pathways
 - 5** Supplied equipment

The governing body should track a set of defined metrics on Accessibility

Member National Authorities (MNAs) (countries eligible for participating in Olympics sailing events)

e.g. number / growth of MNAs

Participation in Olympics

e.g. number of developing nations competing in Olympics, including number of classes

Participation “funnel”

e.g. number of developing nations competing at other formats of international competition, such as Youth Worlds

Agenda

- 1. Marketability
- 2. Sustainability
- 3. Accessibility
- 4. Diversity**
- Appendix

There have been wins in diversity in the sport, yet improvement areas exist

Successes in Olympic Sailing and sailing disciplines

Mixed team events (e.g. mixed Nacra 17; mixed 470) and inclusion of a men's and women's medal event for each class (e.g. Kite, ILCA, 49er)

Equal participation at medal and athlete level

Board of Directors gender parity

Women's Pathway leading participation of female sailors at SailGP

Women's America's Cup event included in protocol for 37th AC

Areas to improve

Targeted education and training programmes to:

- Recruit and upskill more female race officials at international level

Facilitate sharing of best practice across MNAs on:

- Participation of female athletes in the sport
- Recruiting and training more diverse coaches and other support staff

Build the foundation at “grassroots” level

- Promote diversity in sport at professional and amateur level
- Feature diverse athletes in media and marketing efforts

Key Decision areas for World Sailing

Diversity

-
- 1** Support for grassroots DEI initiatives
 - 2** Coach and officials training
 - 3** Governance structure

The governing body should track a set of defined metrics on Diversity

“Grassroots” and international level athlete diversity

e.g. diversity metrics at youth events and international competition (outside of Olympic Games)

Team diversity

e.g. number of female coaches and leaders of Olympic programs

Officials and other roles

e.g. diversity amongst umpires, race officials

We are excited about the future of World Sailing.

There is an opportunity to evolve the way athletes and audiences engage with this incredible sport.

To accelerate momentum within the next 1-2 Quads, the sport should think about how to transform and consider bold ideas to achieve its potential



Appendix

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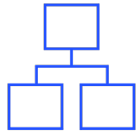
Agenda

1. Marketability
2. Sustainability
3. Accessibility
4. Diversity

Appendix

- **Marketability**
- Sustainability
- Accessibility and Diversity

For discussion: key dimensions of marketability



Structure of Sport and Events

What?

Consider how we can adjust the current **event portfolio to have more variation, shorter and easier to view events**

How?

Look at **sports with characteristics we want to emulate** e.g. surfing, speed climbing, 3:3 basketball

Assess the events and figure out **how to simplify language and communication** to make more accessible to general public



Social Media Strategy

What?

Understand how we can **better engage fans through social media** including what are the best channels, the ideal content

How?

Conduct a survey with viewers targeting specific behaviors, understanding of sport, channels of consumption

Analyze other WFs, events and team's social media strategy; and how individual athletes accounts could play a role



Spectator Event Experience

What?

Improve the in-person spectator experience to make sailing events an event the general public want to attend

How?

Look at how **other sports and events have changed the spectator in-person experience** to drive engagement e.g., F1, Sail GP

Understand spectator's expectations and behavioral trends



Innovative Technologies

What?

Explore new technologies which could be used to take the fan experience to the next level

How?

Research key technology trends both in sport and out of sport, and discuss with experts on how these could be leveraged to improve the fan experience

Look at how other sports events are leveraging tech e.g. use of cameras on boats, team radios which flow through to broadcasters



Broadcast Coverage

What?

Identify ways to increase broadcast coverage and support broadcasters to **showcase the sport in a more accessible way**

How?

Engage with broadcasters who currently show sailing events to understand strengths and gaps

Identify ways to support broadcasters simply sailing to general public through exploring how other sports have done so

The aim of the marketability stream is to define various big bets and no regrets moves to inform the strategy going forward

How do we define success?

- Improving the overall engagement across platforms
- Lowering the average age of the watcher

Further refinement and definition is required – Can we discuss?

Approach to Marketability Workstream



Baseline

Understand where World Sailing is today across various dimensions



Case Studies

Explore what has been successful or unsuccessful for other sports



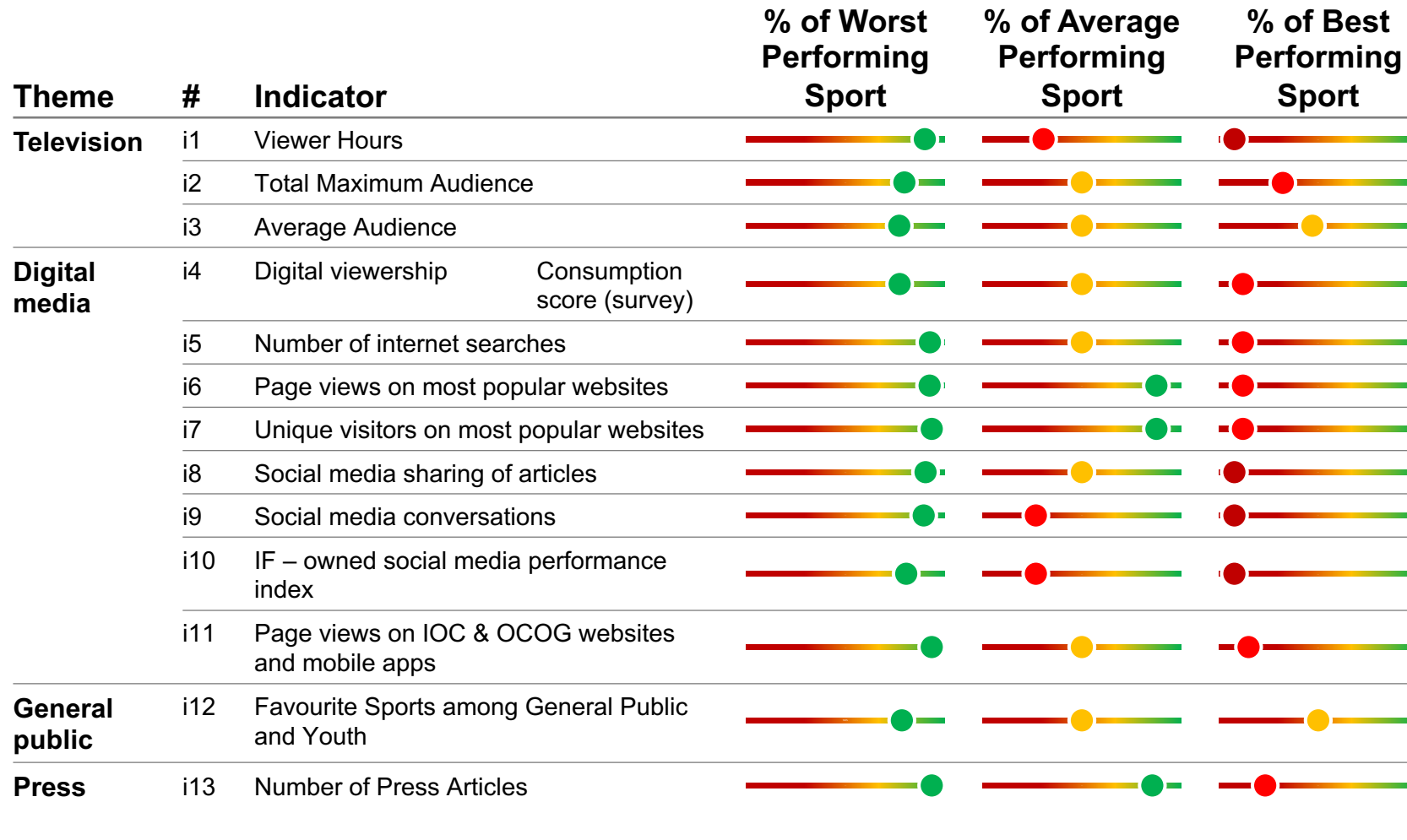
Big Bets & No Regrets

Define Big Bets & No Regrets moves on how to improve the marketability of the sport

World Sailing's IOC Indicator's Performance at Tokyo 2020

World Sailings Performance is classed as 100% in this analysis

% >100% % 50-100% % 10-50% % <10%



Key Insights

- World Sailing is not the worst performing on any metric
- On i6, i7 and i13 WS is performing above average
- Sailing appears to be performing better on streaming channels
- Social Media is a great opportunity to improve WS's performance across the indicators

Event Level Performance

Event	Gender	Overall rank ¹		Deep Dive			
		Rank (Rio 2016)	Rank (Tokyo 2020)	I1: Viewership Hours		I2: Max Audience	
				Rio	Tokyo	Rio	Tokyo
49er – Skiff FX	Women	5	1	15,884	19,816	44,087	44,243
Laser - One Person Dinghy	Male	1	2	9,501	12,001	38,662	42,821
RS:X - Windsurfer	Women	2	3	9,864	10,222	55,518	46,554
RS:X - Windsurfer	Male	3	4	9,635	8,585	37,204	37,268
Finn - One Person Dinghy (Heavyweight)	Male	6	5	4,249	3,205	23,579	9,547
470 - Two Person	Women	10	6	3,860	8,075	21,316	34,488
49er - Skiff	Male	9	7	6,245	3,043	26,377	14,281
Nacra17 Foiling - Mixed Multihull	Mixed	7	8	12,592	7,362	53,506	26,170
Laser Radial - One Person Dinghy	Women	5	9	9,146	7,136	51,358	24,242
470 - Two Person Dinghy	Male	8	10	3,574	5,408	11,870	18,534

1. Overall Rank was determined by ranking the performance of each event on each indicator, and then summing the ranks to create an overall rank

Key Insights

- 4 out of the top 5 events are 1 Person events, which is different from other sports where team events are usually popular
- Windsurfing is consistently high
- Women's windsurfing was a close race in Tokyo and also featured a strong Chinese athlete, likely driving up viewership due to the favourable timezone
- Men's Laser featured a strong Australian athlete, also likely driving up viewership due to favourable timezone

The IOC have adopted a new strategy which impacts the space in which we define our strategy

How has the IOC changed and how is the IOC continuing to change?

Income Sources	Sport Selection	Events
<ul style="list-style-type: none">Seventy-three per cent of its global revenue of US\$5.7 billion in the most recent Olympic cycle, from 2013 to 2016, came from television broadcasting rights⁶.However, with declining broadcast viewing could harm the revenue stream^{7,8}.The IOC is actively diversifying their revenue streams, including placing more importance on partnerships	<ul style="list-style-type: none">New system of Sport Selection:25 core sports, with several floating sports which are up for review after each Olympics¹Criteria is focused on added value; youth appeal; attractiveness for TV, media & general public; minimum impact on quotas, infrastructure & operational costs/complexity	<ul style="list-style-type: none">All additional event requests for Paris 2024 were rejected, proposals were only allowed at the expense of existing events being dropped²Increase in number of mixed events & Pushing for gender balance (9 mixed events in Rio □ 18 mixed events in Tokyo -> 22 in Paris)³Reducing athlete quota (11,100 in Tokyo -> 10,500 in Paris)^{2,3}

The IOC is operating in a landscape of continued scrutiny due to concerns over costs, becoming “white elephants”, environmental damage and human rights issues⁴. They are also facing a generation more aware of such issues and who are less interested in sports⁵

1. <https://www.topendsports.com/events/summer/sport-selection.htm>
2. <https://olympics.nbcsports.com/2020/12/07/breakdancing-olympics/>
3. <https://olympics.com/ioc/news/olympic-agenda-2020-drives-progress-and-change>
4. <https://www.nytimes.com/2022/02/08/opinion/olympics-beijing-ughurs.html#:~:text=The%20Olympics%20have%20been%20in,%2C%20more%20recently%2C%20the%20pandemic.>

5. <https://www.scmp.com/week-asia/health-environment/series/3137940/young-people-tune-out-can-olympics-vault-over>
6. <https://olympics.com/ioc/funding>
7. <https://theconversation.com/fewer-viewers-nervous-sponsors-the-olympics-must-rethink-efforts-to-stay-relevant-165580>
8. <https://www.bloomberg.com/news/articles/2021-07-30/olympics-ratings-slump-forces-nbc-to-haggle-with-advertisers>

By trying to diversify their revenue streams, the profile of sports to the general public and their ability to attract the right audiences becomes more crucial for the IOC.

This is a likely driver behind the creation and growth of the Olympic Channel, as it provides a platform for the IOC to drive engagement

The selection of sports has this directly in mind, with the focus on youth appeal, added value and attractiveness for TV

To understand the value of each sport the IOC categorises them based on various dimension

Category	Sports	Insights
A	Athletics, aquatics (artistic swimming, diving, swimming, and water polo), gymnastics	Seen as highest value sports to the Olympics; Swimming was given 3 additional events at Tokyo 2020 ⁵
B	Basketball, cycling, football, tennis, volleyball	Basketball introduced 3x3 at Tokyo as it is seen as more engaging and accessible for countries who struggle to field a full team ⁷ ; Football restricts the ages of players, with only 3 players over 23 allowed ⁸ ; Track Cycling was pressured to remove time-based events and focus on mass participation events ⁹
C	Archery, badminton, boxing, judo, rowing, shooting, table tennis, weightlifting	Boxing & Weightlifting are at high risk of being removed from the Olympic program ² ; Rowing is facing IOC pressures to remove lightweight rowing and replace with coastal rowing ³
D	Canoe/kayaking, equestrian, fencing, handball, field hockey, sailing , taekwondo, triathlon, wrestling	Canoe has had their program reduced from 12 to 10 events ⁴ ; Triathlon added a mixed relay event ⁶
E	Modern pentathlon, golf, rugby	Modern Pentathlon is at high risk of being cut ¹ ; with strong public opinion for removal golf
F	Baseball/softball, karate, skateboarding, sport climbing, surfing	Sports that the local OC can choose to include or exclude, e.g. karate and baseball were in Tokyo, but will not be in Paris

1. <https://www.insider.com/modern-pentathlon-likely-to-be-removed-olympics-horse-riding-changes-2021-12#:~:text=Modern%20pentathlon%20is%20now%20close,one%20of%20its%20five%20disciplines>

2. <https://www.theguardian.com/sport/2021/dec/09/olympics-weightlifting-boxing-risk-being-dropped-2028-games>

3. <https://www.insidethegames.biz/articles/1113562/coastal-rowing-la2028-rolland-olympics>

4. <https://www.britishcanoeing.org.uk/news/2020/changes-to-canoeing-paris-2024-olympic-programme-approved-by-ioc>

5. <https://www.swimmingworldmagazine.com/news/event-changes-likely-as-paris-2024-moves-to-nine-day-schedule-of-finals/>

6. <https://www.active.com/triathlon/articles/what-to-know-about-triathlon-at-the-tokyo-olympics>

7. <https://www.npr.org/sections/tokyo-olympics-live-updates/2021/07/27/1021055553/the-u-s-will-likely-medal-in-3x3-basketball-what-to-know-about-the-new-sport>

8. <https://olympics.nbcsports.com/2020/04/03/fifa-olympic-soccer-age-rule/>

9. <https://www.cyclingweekly.com/olympics-omnium>

Sailings D categorization places them at **potential risk for the future of their program**. It also highlights their level of favorability from the IOC especially given the high investment and operating costs required to host the events, from the IOC unless it can improve its position.

Category F sports are being included to attract a younger audience to the Olympics

Skateboarding

- Introduced with the hope it will add a “jolt of youthful rebellion”
- Seen as a way to “revitalize its viewership” and attract further sponsorship¹
- Potential to become the highlight of the summer Olympics, similarly, to snowboarding at the winter Olympics²

Sport Climbing

- Introduced due to the surge in popularity in the sport, especially amongst 16–35-year-olds, as a recreational sport³
- Success of the “Free Solo” documentary, which won an Oscar in 2019, and brought a new audience and interest in the sport
- Seen as a way to attract a younger audience, with a fast-paced sport with layers of problem solving³

Surfing

- Introduced to attract a younger audience, as its seen as “young, trendy sport”
- Despite facing similar weather challenges to sailing, and the need for its own venue, surfing has been confirmed for the next 2 Olympics, with the local organizing committees excited to host it⁵

All 3 sports have faced some level of controversy and reluctance from the athletes. All of these sports are somewhat “counter-culture” and were against the formalisation being part of an Olympics requires^{2,4} However, the events were deemed a success at Tokyo 2020.

1. <https://theconversation.com/from-outlier-to-olympic-sport-how-skateboarding-made-it-to-the-tokyo-games-165152>
2. <https://www.mensjournal.com/adventure/tony-hawk-says-olympics-need-skateboarding/>
3. <https://www.theguardian.com/sport/2021/aug/05/climbing-scoring-tokyo-2020-olympics-adam-ondra>
4. <https://www.outsideonline.com/outdoor-adventure/climbing/international-olympic-committee-got-it-wrong-including-climbing-and-surfing-olympics/>
5. <https://isasurf.org/riding-the-wave-to-olympic-inclusion/>

What does this mean for sailing?

The IOC is focused on attracting youth with engaging and exciting sports. Having a strong youth appeal can create opportunities for sports

Sailing will need to pivot itself to be able to replicate these key characteristics to be competitive. However, to do this it needs to create a narrative which engages the youth on their channels.

A sport's performance is measured by key indicators which are evolving to focus more on online engagement

Theme	#	Indicator	Level of Analysis					
			Sport			Event		
			London	Rio	Tokyo	London	Rio	Tokyo
Television	i1	Viewer Hours	✓	✓	✓	✗	✓	✓
	i2	Total Maximum Audience	✓	✓	✓	✗	✓	✓
	i3	Average Audience	✓	✓	✓	✗	✓	✓
Digital media	i4	Digital viewership	✗	✗	✓	✗	✗	✗
		Consumption score (survey)						
		IOC digital platforms	✗	✗	✓	✗	✗	✓
	i5	Number of internet searches	✓	✓	✓	✗	✓	✓
	i6	Page views on most popular websites	✓	✓	✓	✗	✓	✓
	i7	Unique visitors on most popular websites	✗	✓	✓	✗	✓	✓
	i8	Social media sharing of articles	✓	✓	✓	✗	✓	✓
	i9	Social media conversations	✗	✗	✓	✗	✗	✓
	i10	IF – owned social media performance index	✗	✗	✓	✗	✗	✗
	i11	Page views on IOC & OCOG websites and mobile apps	✗	✓	✓	✗	✓	✓
General public	i12	Favourite Sports among General Public and Youth	✓	✓	✓	✗	✗	✗
Press	i13	Number of Press Articles	✓	✓	✓	✗	✓	✓

Key Takeaways

- IOC is putting a bigger emphasis on social media engagement & digital channels, meaning driving engagement here is crucial
- Specifically IOC is interested in driving viewership on their channels, meaning IFs have somewhat limited control
- IOC is shifting to an event level analysis, meaning individual events could be at risk

Sports on Social analyzed 40 IFs performance across platforms which showed increased engagement across the board



Instagram

- IFs added 10.5m followers on Instagram
- Ifs racked up 527.9m engagements, 100% YoY increase
- Instagram has the most engagement overall at 445m
- Event related content generated substantial engagements



Facebook

- Videos are the key content on Facebook, with 92% YoY increase in video views
- Total video views were over 4.2bn; 64% of these came from 5 IFs
- Total engagements on Facebook was 110m



YouTube

- Archived event footage or informational content in quality, not quantity is the key
- 75 videos amassed 1m+ views of which 72% were match/event highlights and 8% via livestreams



Twitter

- There were 3x the number of tweets vs Instagram posts
- However, the engagement rate on tweets (0.2%) was the lowest across any channel



TikTok

- Hardly used by Ifs, with World Athletics being the most successful (3.2m followers, with over 530m views)
- Short, on trend, funny and engaging content posted daily is keys

The key across all platforms is creating a more informal narrative focused on athletes and leveraging archive footage

SportOnSocial also created a league table, ranking the 40 IFs

International Federation	2022	International Federation	2022
Badminton World Federation (BWF)	1	International Boxing Association (IBA)	21
Volleyball World	2	C International Federation of Sport Climbing (IFSC)	22
FIFA	3	World Baseball Softball Confederation (WBSC)	23
World Athletics	4	International Hockey Federation (FIH)	24
International Basketball Federation (FIBA)	5	International Ice Hockey Federation (IIHF)	25
International Cycling Union (UCI)	6	World Taekwondo (WT)	26
World Archery	7	C International Surfing Association (ISA)	27
World Rugby	8	World Curling Federation (WCF)	28
International Federation for Equestrian Sports (FEI)	9	International Shooting Sport Federation (ISSF)	29
International Swimming Federation (FINA)	10	International Weightlifting Federation (IWF)	30
United World Wrestling (UWW)	11	B World Rowing	31
World Table Tennis (WTT)	12	International Fencing Federation (FIE)	32
International Judo Federation (IJF)	13	C World Skate	33
International Gymnastics Federation (FIG)	14	A World Sailing (WS)	34
International Ski Federation (FIS)	15	International Luge Federation (FIL)	35
International Handball Federation (IHF)	16	World Triathlon	36
International Tennis Federation (ITF)	17	B International Canoe Federation (ICF)	37
International Skating Union (ISU)	18	World Pentathlon (UIPM)	38
World Karate Federation (WKF)	19	International Bobsleigh & Skeleton Federation (IBSF)	39
International Biathlon Union (IBU)	20	International Golf Federation (IGF)	40

Key Insights

- A World Sailing is ranked 34th, in the bottom quartile, suggesting there is a lot of opportunity for improvement on our social media strategy
- B Sports seen as similar to sailing, such as rowing and canoe, were also ranked in the bottom quartile
- C Sports which are seen as “trendy” and “exciting” by the IOC also seem to have a low ranking. However, this could be driven by the more informal nature of some of these sports.

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International Federation	2022	International Federation	2022
D Badminton World Federation (BWF)	1	International Boxing Association (IBA)	21
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Key Insights

D Badminton is ranked 1st overall. Report suggests success driven by connecting fans closer to athletes in a consistent, accurate, reliable and engaging way. Player engagement, willingness & accessibility is key to realise full potential

The BWF also run a “Star creation program” where they delivered intensive tutoring to athletes on social media literacy

E Swimming is ranked 10th overall, however is, ranked 1st on Facebook, with particularly high engagement on videos which used archive footage in the forms of “epic flashbacks” and creating a narrative around athletes

SportOnSocial also created a league table, ranking the 40 IFs

International Federation	2022	International Federation	2022
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H World Karate Federation (WKF)	19	International Bobsleigh & Skeleton Federation (IBSF)	39
International Biathlon Union (IBU)	20	International Golf Federation (IGF)	40

Key Insights

- F Athletics is ranked 4th overall. High engagement and following on Instagram and TikTok (being one of the only IFs active on the platform)

Gained 1.2M new followers (116% increase) mainly surrounding key events like Olympics and Continental Tours

Embraced TikTok for its informal, playful, trend-based nature
- G Cycling is ranked 6th overall, however, shows no unique strength in a particular channel.
- H Karate is 19th overall. Karate is not a permanent Olympic sport and will not be returning. They receive minimal Olympic funding, yet are able to rank higher than many IFs who rely on it.

We should engage and showcase athletes to create a strong narrative around the sport, leading to great social media content



Brand Ambassadors / Athlete Partnership

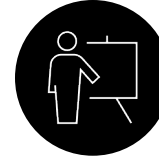
Select key athletes, ideally with already strong social media presence, to help drive the popularity of sailing even further. Do collaborations and engagement



Athlete Social Media Training

Run a series of trainings to equip athletes with the skills to take control of their social media and create engaging content; as well as educate them on the power of social media in supporting their journey

World Badminton ran a training programme to upskill their athletes and improve their individual content creation, which they have since started re-using on their channels; NCAA runs programs for college athletes in the US



Athlete-Focused Content at Events

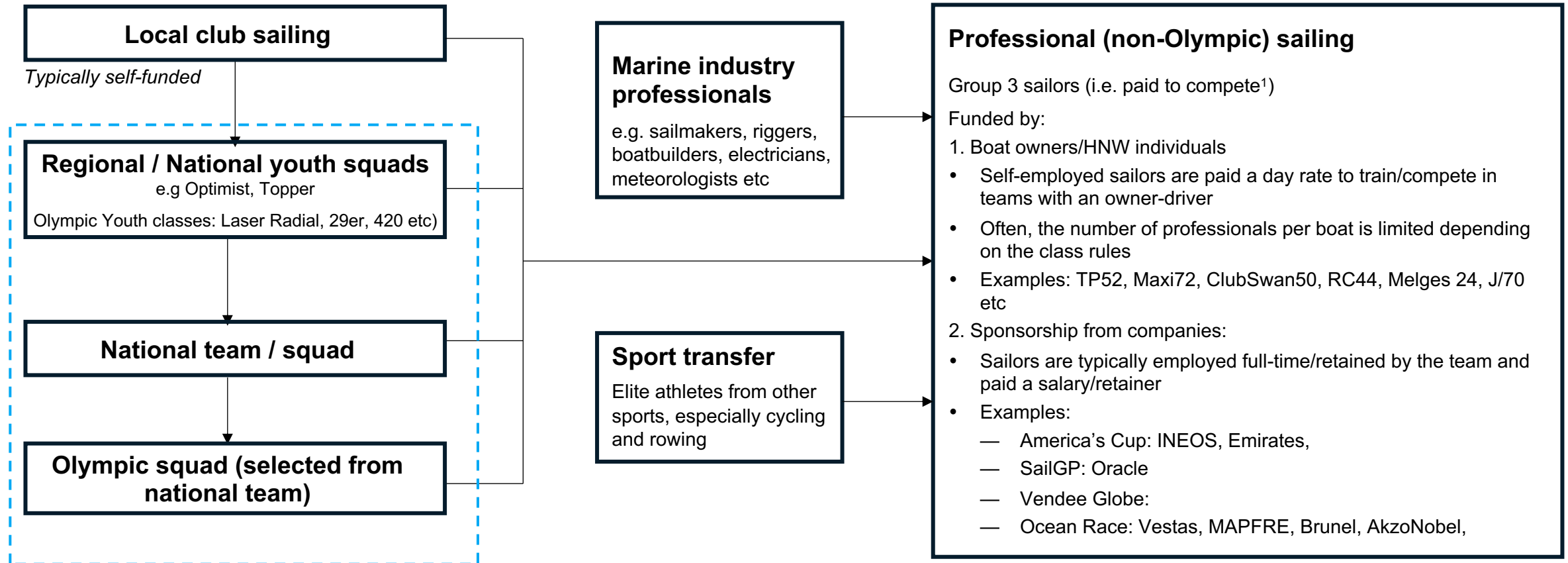
Ensure there is on-the-ground presence at key events, and create engaging out-of-sport segments with the athletes which are amusing or educational

F1 has an “off-the-grid” segment where they quiz each of the athletes on a topic, and it often goes viral; they also have a team which captures key moments away from the racing

Athletes and UGC can help build our brand presence on social media

	Athlete/Brand Ambassadors	User generated content
Who	Individuals vetted, verified, and invited to contribute content	Anyone in the world can contribute UGC — even if the contributor is not brand-approved
Purpose	Working to build brand awareness and trigger initial considerations of a brand	Impactful and trusted source throughout the consumer journey as content is not controlled directly by the brand
Payment	Paid on flat rate per project basis or on an ongoing basis for representing the brand or receive free products/services	Typically unpaid, though some campaigns can offer rewards to help seed and source content
Measuring impact	Straightforward measurement because brand knows Who is posting What, where, when	Requires social listening to measure impact due to diverse, dispersed voices
Creative control	Brand more closely regulates messaging and could require post reviews before content is shared	Brand has little control over initial content (unpredictable) but can try to impact follow-up content (e.g. addressing incorrect statements about product)

Sailing development pathway



Funding varies depending on country (and athlete performance) – usually a combination of government funding, lottery money, sponsors and self-funding

1. U18s categorized as Group 1; U22s categorized as Group 1 provide number of days paid sailing/Group 3 activity does not exceed 100 days per year

The Olympic Program for Paris 2024 has been adjusted to include kiteboarding and increase the number of mixed events

Tokyo 2020 Olympic Programme

49er – Skiff FX	Women
49er - Skiff	Men
Laser Radial - One Person Dinghy	Women
Laser - One Person Dinghy	Men
RS:X - Windsurfer	Women
RS:X - Windsurfer	Men
470 - Two Person	Women
470 - Two Person Dinghy	Men
Nacra17 Foiling - Mixed Multihull	Mixed
Finn - One Person Dinghy (Heavyweight)	Men



Paris 2024 Olympic programme

49er - Skiff FX	Women
49er - Skiff	Men
Laser Radial - One Person Dinghy	Women
Laser - One Person Dinghy	Men
iQFoil - Windsurfer	Women
iQFoil - Windsurfer	Men
Kiteboarding	Women
Mixed Two Person Dinghy – 470	Mixed
Nacra17 Foiling - Mixed Multihull	Mixed
Kiteboarding	Men

There are some questions from athletes and sailing fans that the sailing Olympic program is changing too much without full consideration on the athlete implications and the spectator confusion

Proposed Case Studies



Sail GP

Aiming replicate some of the success of F1 and similar series in sailing



Swimming

Consistently high viewership at the Olympics globally



Formula 1

Significant growth, particularly in youth, in recent years

Details follow



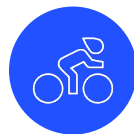
Americas Cup

High profile sailing event which attracts a lot of sponsorship



NBA (Basketball)

High audience and fan engagement across the US, and growing globally



Road Cycling

Faces similar logistical challenges and confusion over race calendar



Sailing Comparable



High Viewership Sports



Equipment Demanding Sports

Information to be Included in Case Studies

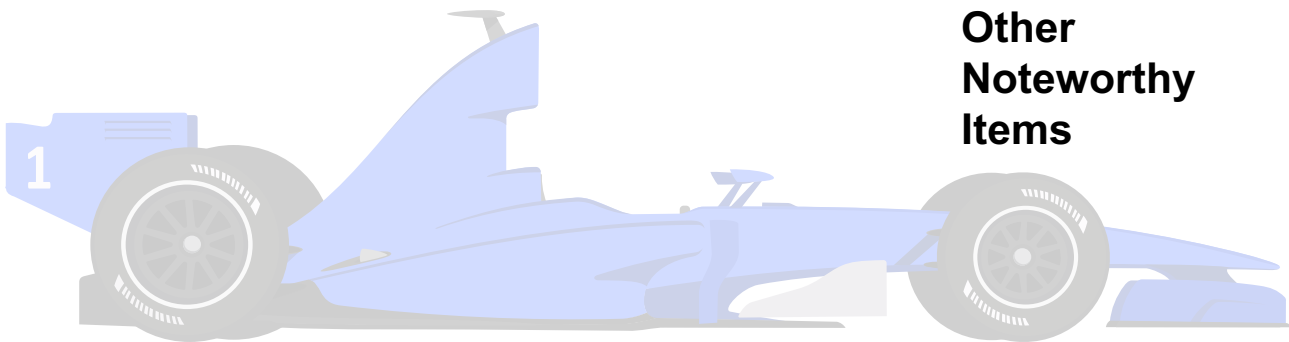
- Structure and Format of the Sport
- Broadcast Strategy and Engagement Levels
- Social Media Strategy and Engagement Levels across Platforms
- Entry Points into the highest level for each sport
- Key Insights

We will complete an example case study to review next week and act as the template for the other studies

F1 is a top global motorsports league which has seen major growth, particular amongst 16–35-year-olds, in recent years

Formula 1 Format & Structure

Primary Unit of Competition	20-23 Grand Prix races per season each in a different locations, with an overall drivers and constructors' championship via points based on position at each race
Number of Athletes	20 drivers across 10 teams
Requirements to Host	FIA Grade 1 Circuit or Temporary Street Circuit
Cost to Host	Estimated \$20-60M fee per year + Running Costs
Equipment Requirements	<ul style="list-style-type: none">• Each team has their own cars and supporting infrastructure which must be moved from race to race• Restrictions on most equipment and car design which change most seasons, with tires provided by F1
Other Noteworthy Items	<ul style="list-style-type: none">• \$200M anti-dilution fund fee for new teams which is shared across existing teams• \$140M team spending cap with aim to close performance gap between teams and control spiraling costs



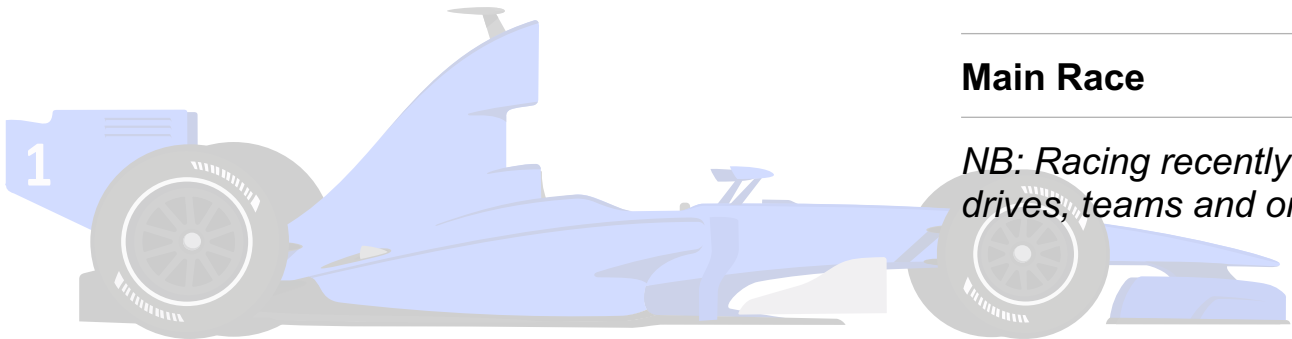
F1 have a predictable race structure with clear timings with different formats to make for engaging viewing

Competition Structure

Each Grand Prix has 3 Practice Sessions, a Qualifying Session and the main race. Three Grand Prix also have Sprint Qualifying.

Practice sessions	<ul style="list-style-type: none">• Allow drivers to test the car and track.• Lasts between 60-90 mins.• Usually take place on Friday all-day and Saturday morning
Qualifying Session	<ul style="list-style-type: none">• Lasts ~1hr and is split into Q1, Q2 and Q3.• Q1 lasts 18 mins, with all 20 cars doing laps as fast as they can. The 5 slowest cars are eliminated.• Q2 lasts 15 mins, with the remaining 15 cars doing laps as fast as they can. The 5 slowest cars are eliminated.• Q3 lasts 12 mins, with the remaining 10 cars doing laps as fast as they can. Final order of lap times reflects starting grid for race.
Sprint Qualifying (only at 3 races per season)	<ul style="list-style-type: none">• Done after primary qualifying session, with the starting grid reflecting the results of qualifying• Short, fast racing spectacle race run over ~100km, lasting 25-30 mins, with points awarded for top 3
Main Race	<ul style="list-style-type: none">• First over the line wins of an ~190-mile race, which lasts 1-2hrs

NB: Racing recently switched to Fri-Sun (removing Thurs from the timetable) to give drives, teams and organizers more breathing time between events



F1 has a strong social media presence which focuses on video content and creating a narrative with the drivers and teams

Channel	# of Followers	Type of Content
Twitter	7.8M	Links to articles on website; retweet of drivers and teams; reports of some insta content; live tweeting during race with updates
Instagram	19.1M	Videos <60secs of race highlights/moments with overlays; ranking updates; ; Driver moments; Insta stories showing behind the scenes
YouTube	7.6M	Highlights from each event with over 4M views per video; Top 10 Moment videos; Short Funny Clips; Podcasts
Facebook	12.1M	Links to articles on their website; Videos < 60secs; Combination of Insta, Tiktok Content

On race weekends, across channels, there is continuous content creation showing snippets of racing, interviews with drivers, updates on positions and interactive segments with drivers

Key insights

Instagram, where 23% of posts happened, **there was the most fan engagement**, most total sponsorship value and the highest average sponsorship value per post.

Relatively unique to F1, is that **video platforms**, youtube and tiktok have **2nd and 3rd highest value per post**

F1 has seen **growth of 77% in 2021 in 16 to 35-year-old market** due to storytelling programming and additional peripheral

Each team also has strong social media engagement across platforms, as well as various news accounts dedicated to F1, driving up engagement beyond these numbers

Examples of recent content across social media channels



Short infographics, including current positions, driver's historic performance and team performance



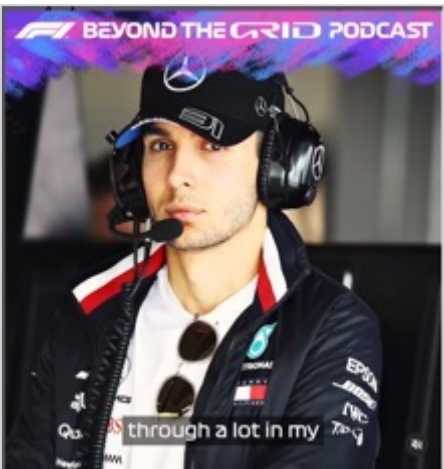
Short video clips from racing, including crashes, key radio moments, overtakes, with graphic or text overlays



Interactive segments with drivers like "grill the grid" which bring out the personalities of the drivers



Behind the scenes of drivers and team activities on race days

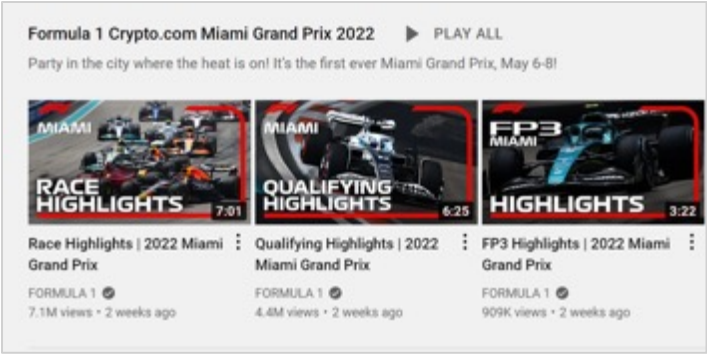


Short videos providing snippets of the podcast, with each episode focusing on a driver and their life



Race summaries with links to F1 website for more detailed content

YouTube provides race, qualifying and practice session 20-30 min highlights



F1 Case Study: Key Insights



Event timings and lengths are short and digestible



Racing Weekends are in a predictable format



F1 are proactively changing and adjusting rules to make the racing “more exciting” and equal between teams



Strong social media presence, focused on storytelling and showcasing drivers and teams both on and off the track



Video content is critical to F1 across all social media channels



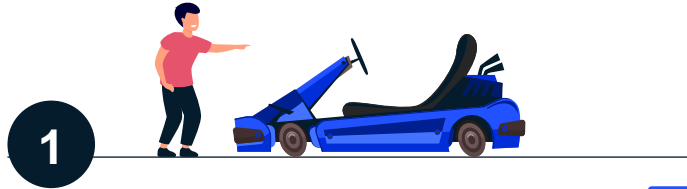
Use of technology, integrated into overlays for broadcast enhances the viewer's experience

There are various ways which a driver can enter the F1

F1 Entry Points and Development Pathways

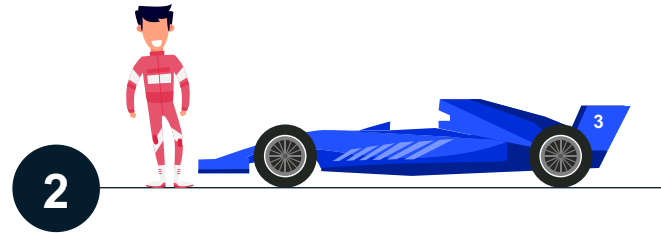
Kart Racing

Most F1 drivers start their racing career as a kid here. Usually, Kart racing alone is not enough, but provides the key foundation for most drivers



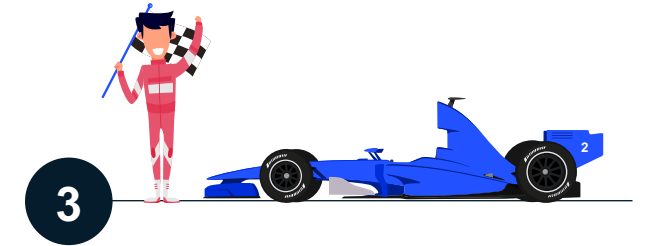
F3 & Similar

These are first solo-driver leagues after kart racing. It is possible to from these directly to F1 Teams (e.g. Max Verstappen)



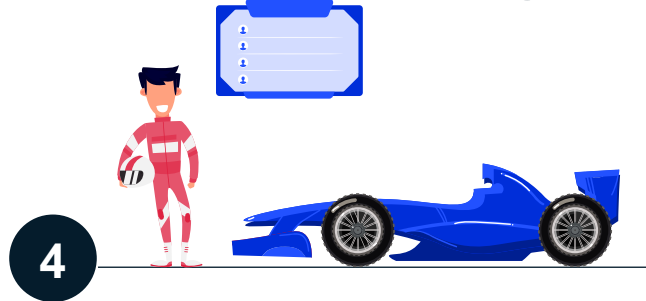
F2

Most F2 champions graduate into the F1, and is seen as the primary entry point



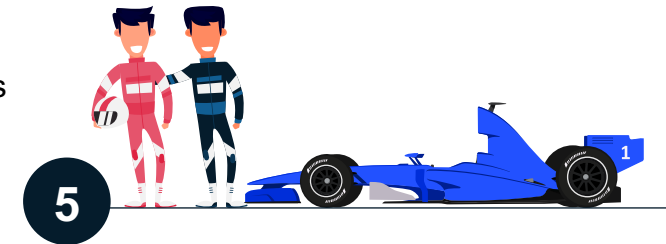
Non-Traditional Route

This includes IndyCar and Open Cart Racing where a driver can earn points to make them eligible for an F1 racing license



Driver Academies

Various F1, F2 and Fe teams run driver academies to train and invest in the next generation of drivers.



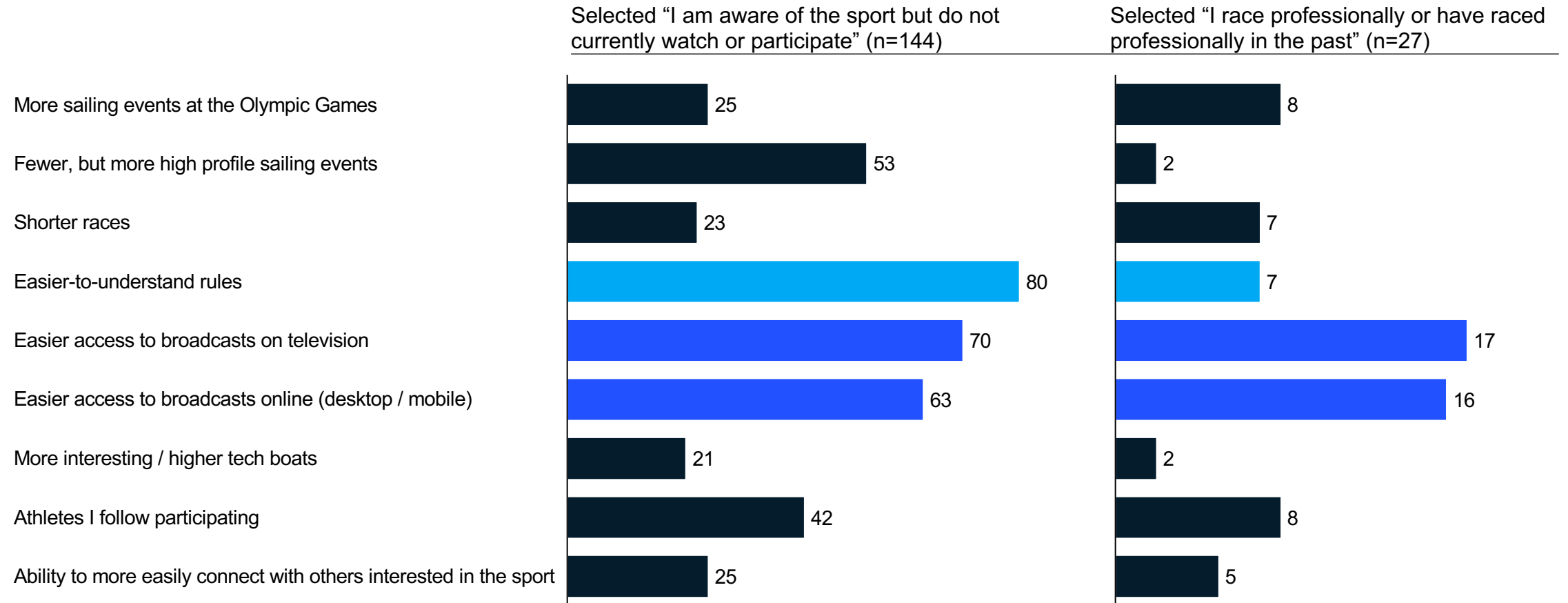
However, money is the biggest challenger for most upcoming potential F1 drivers with estimated **\$10M** in funding required to get an athlete to the point they are ready for the F1

World Sailing survey

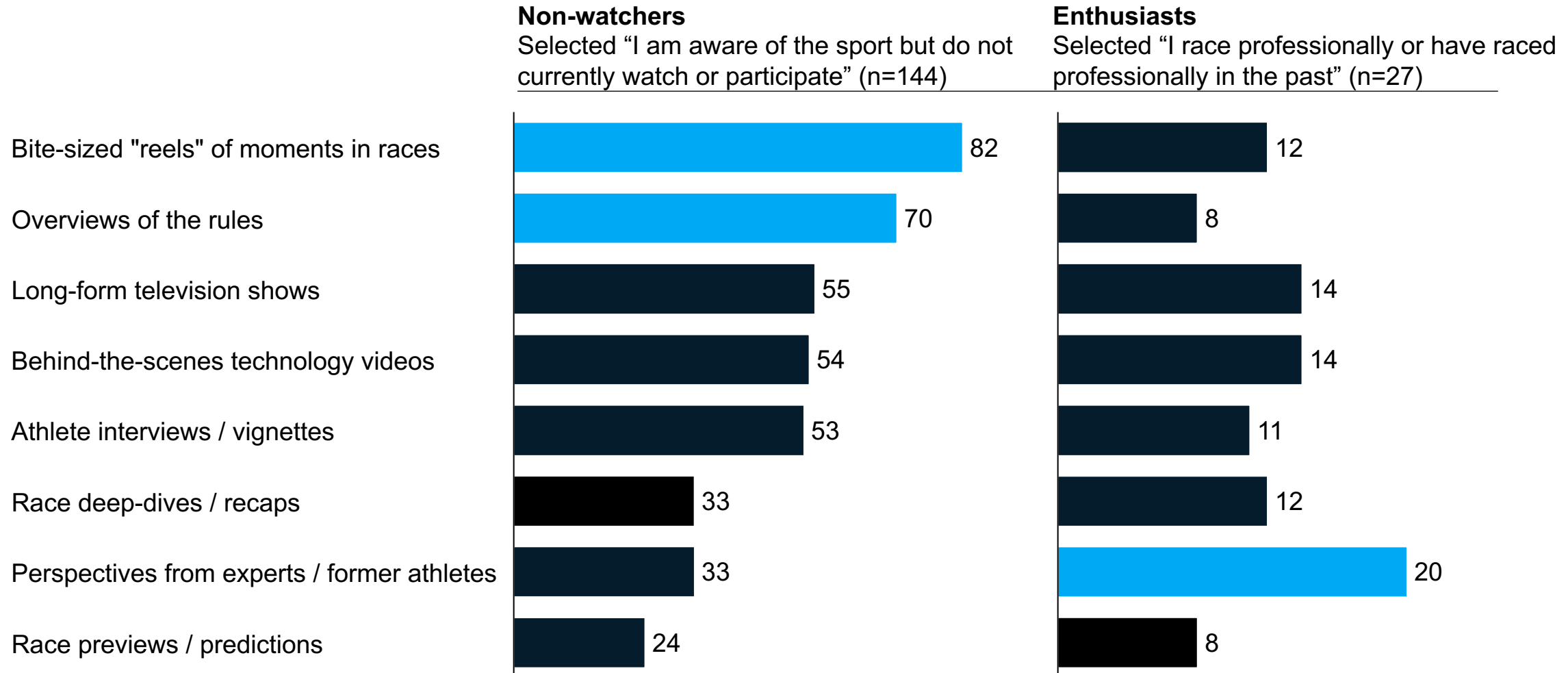
Survey respondent profile

- **237** surveyed
- **42% aged 18-29**, 28% 30-39, 16% 40-49
- **54%** female
- **70% located in North America & Caribbean**, 22% in Europe
- **61%** were aware of sailing as a sport but **did not watch or participate**
- **30% watched** at least one sailing event during the **2020 Olympic Games**

For athletes who are “aware of the sport but do not participate,” ease of access and ease of understanding the sport were most likely to encourage them to watch

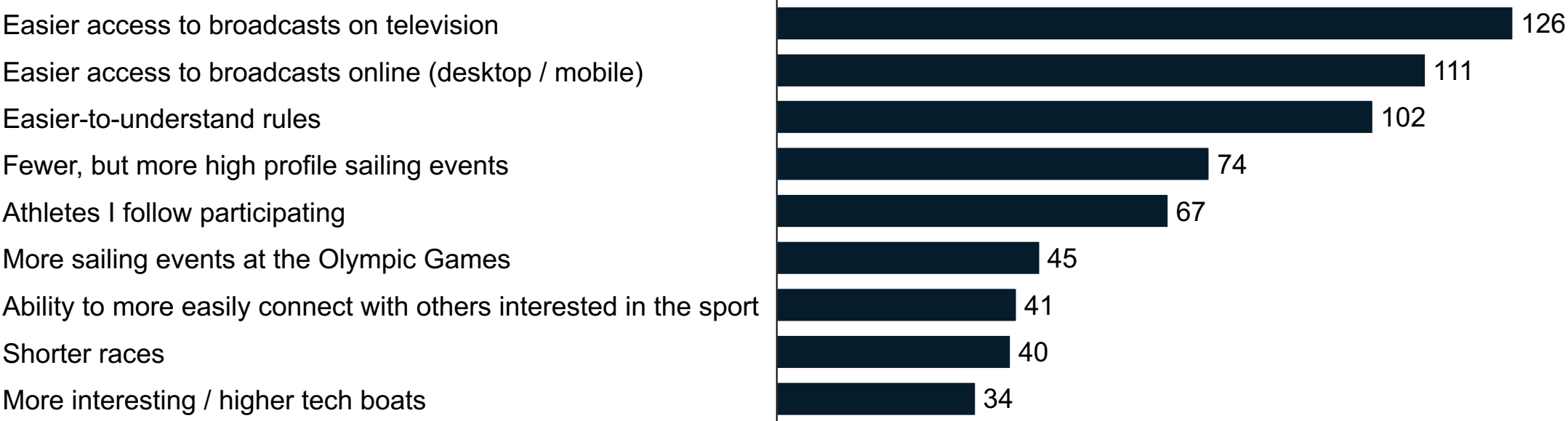


For non-watchers, “Bite Sized Reals” and “Rules overviews” would be compelling content; for professionals, hearing from experts/former athletes would be more interesting



One in two people said easier access to broadcasts would make them more likely to watch sailing at the Olympic Games

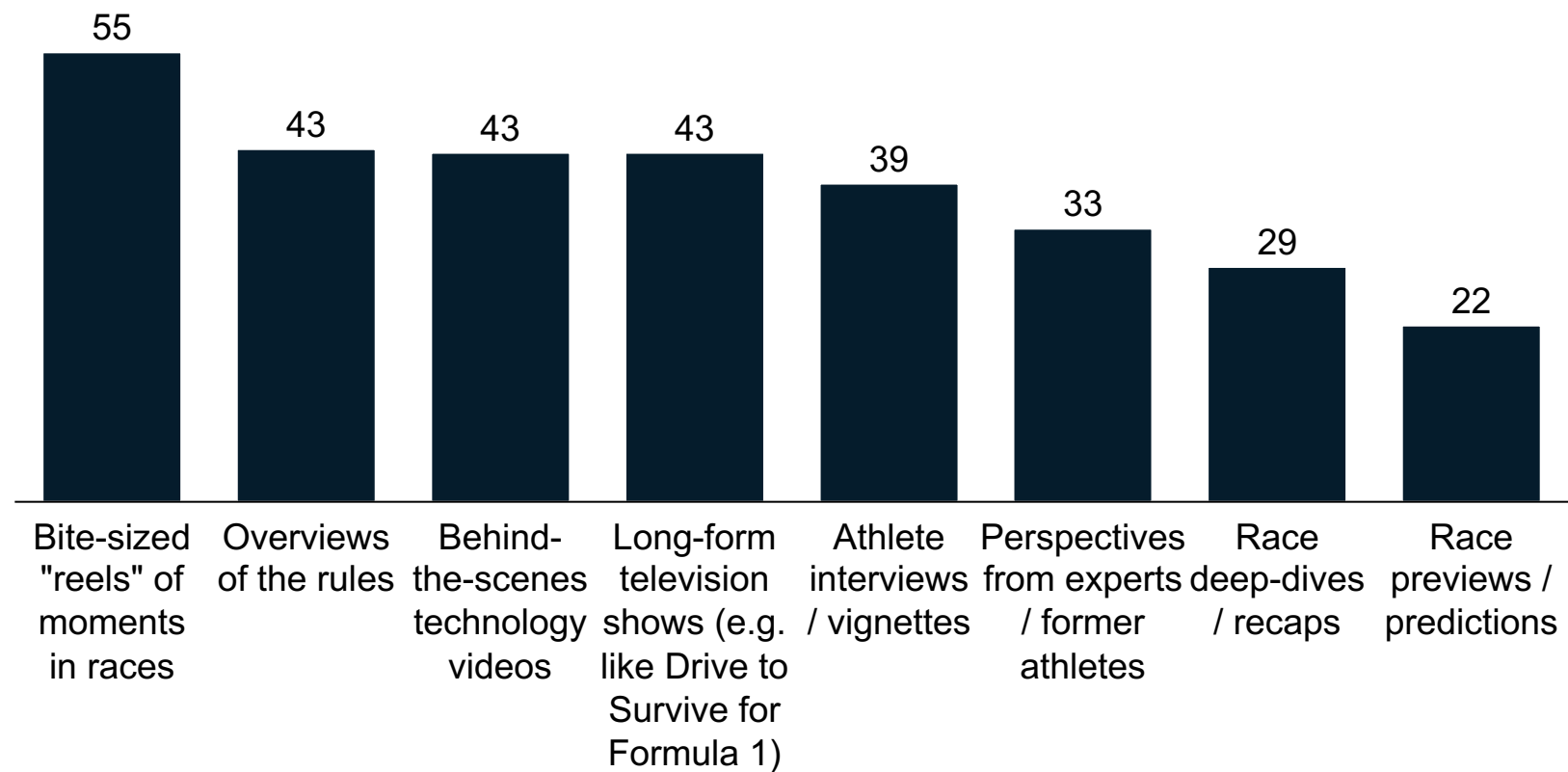
Survey responses to “What would make you more likely to watch sailing at the Olympic Games?”



Making the sport more accessible and improving the competitive format are both important improvement levers

Respondents were more interested in quick race highlights than longer deep-dives, previews, and vignettes

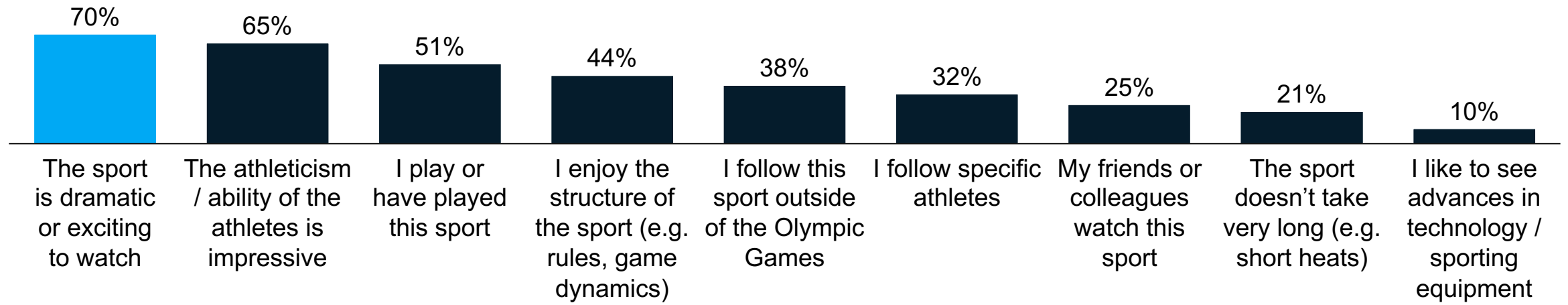
Survey responses to “What additional types of sailing content would you be interested in?”



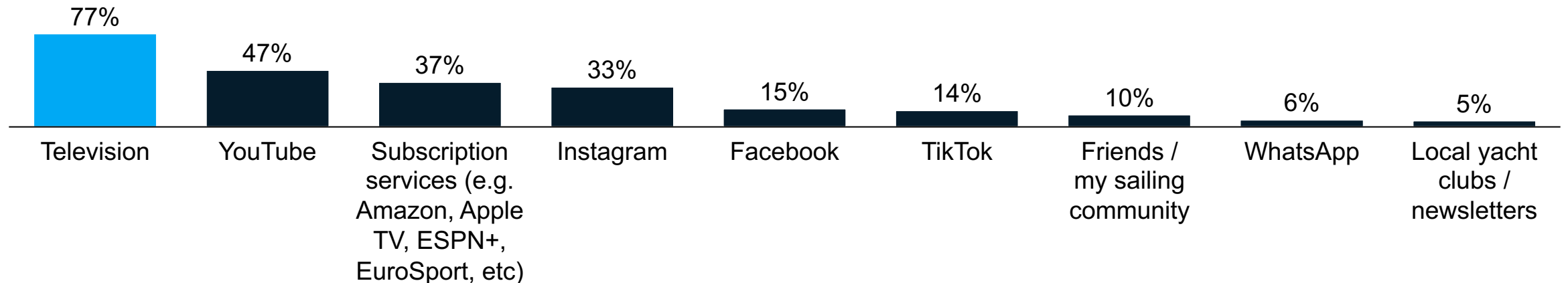
Most sports viewer segments are migrating toward **shorter/faster** live game formats (e.g., Red Zone, highlights, live look-ins)

~77% of respondents consume sports media content via television, and most are attracted to the excitement of watching events

Survey responses to “Why do you enjoy watching certain Olympic Games events?”



Survey responses to “Where do you typically consume sports media content?”



Viewership across sailing events at the Olympic Games generally does not vary

Survey responses to “Which of these sailing events at the Olympic Games have you heard of?”

470 - Two Person (women)

470 - Two person Dingy (men)

49er - Skiff FX (women)

49er - Skiff (men)

Finn - One Person Dingy (men)

IKA - Kiteboarding

iQFOIL - Windsurfing

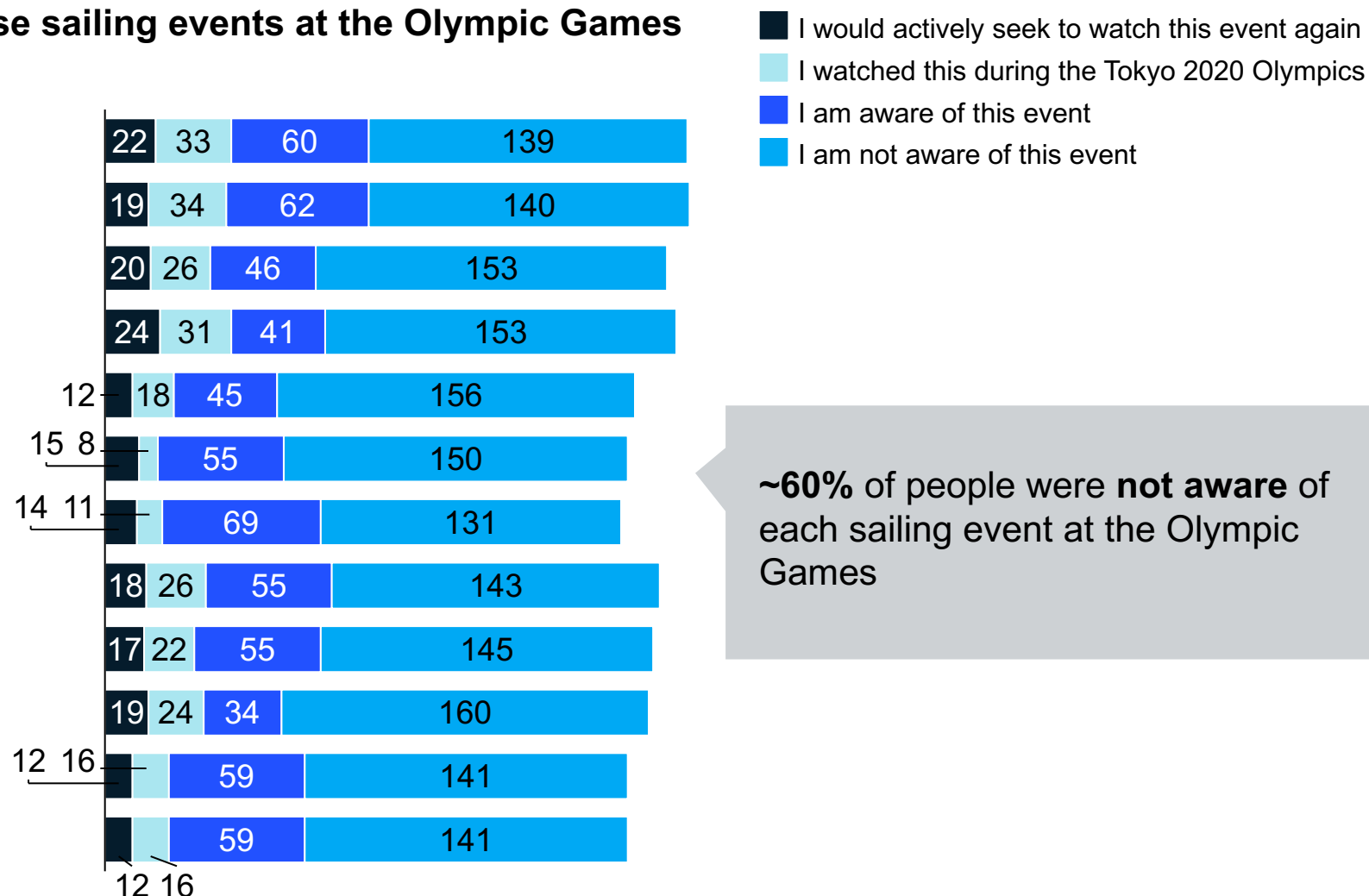
Laser - One Person Dinghy (men)

Laser Radial - One Person Dingy (women)

Nacra 17 Foiling - Mixed Multihull (mixed)

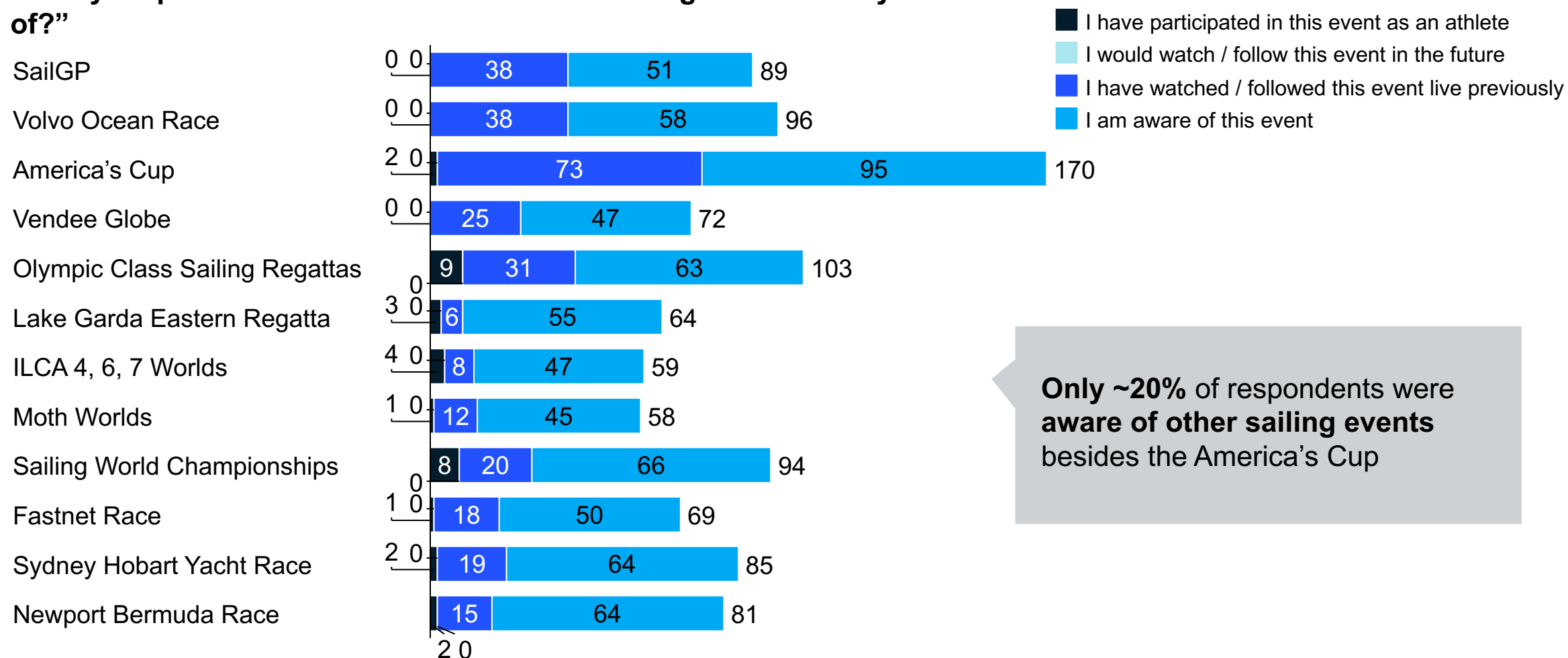
RS:X - Windsurfer (women)

RS:X - Windsurfer (men)



America's Cup had more recognition and popularity among respondents than all other sailing events

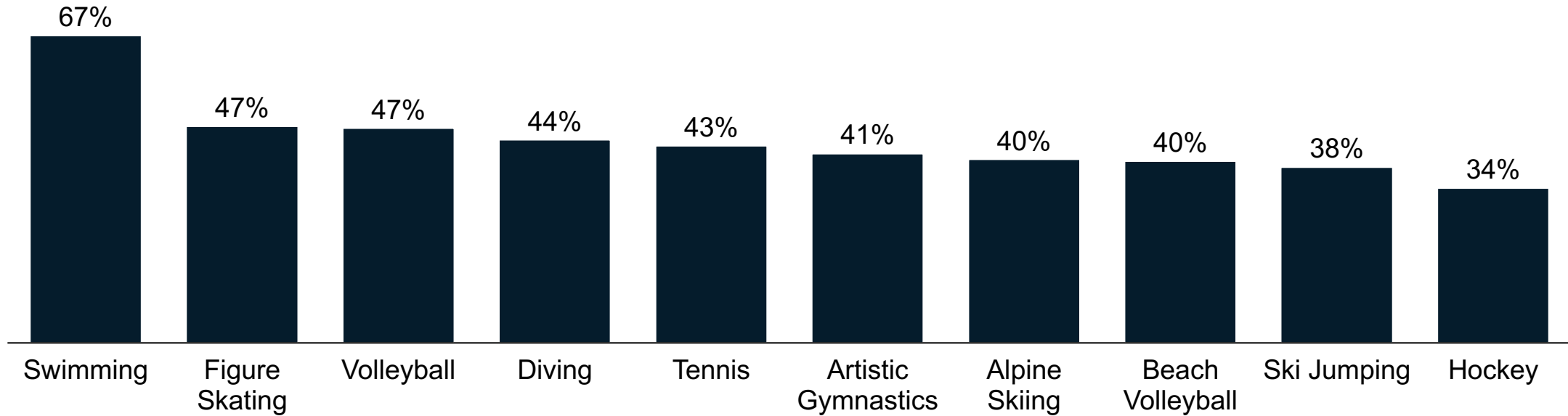
Survey responses to “Which of these other sailing events have you heard of?”



Only ~20% of respondents were aware of other sailing events besides the America's Cup

The top-10 most popular sports were evenly spread out across summer and winter Olympic Games

Top-10 survey responses to “What other events at the Olympic Games do you enjoy watching?”



Similar to sailing, some Olympic Games sports with high viewership **don't have popular leagues/competitions in the interim four years** (e.g., volleyball, figure skating, swimming & diving)

Agenda

1. Marketability
2. Sustainability
3. Accessibility
4. Diversity

Appendix

- Marketability
- **Sustainability**
- Accessibility and Diversity

Significant progress has been made across sustainability, but more can be done across 3 key areas

Not exhaustive

■ Detailed next



Key successes

Industry leading Sustainability Agenda 2030, 22 of 56 targets already achieved

Significant engagement with stakeholders incl. equipment suppliers, athletes, and host venues on sustainability issues

Sustainability high on agenda at the pinnacle of the sport, incl. SailGP Impact League and 11th Hour Racing, driving change downstream



Further improvements needed

- 1 Reduce intercontinental travel where possible
- 2 Reduce environmental impact of equipment used by athletes during Quad
- 3 Reduce impact of events



Relevant WS decisions

Competition format and class selection

Equipment standards

Qualification process / schedule

Event delivery, including use of technology (e.g. electric coach boats, remote umpiring, mark laying drones etc)

1 | For individual athletes, World Sailing as an organisation, and WS events, travel is by far the largest component of carbon footprint

Individual athletes

Depending on athlete nationality and class of competition, air travel could account for **up to 90-95%**¹ of an athlete's carbon footprint

World Sailing organization

An estimated **5700 tonnes of CO2 emissions** per year, of which:

- **55%** business air travel
- **12%** fuels
- **10%** hotel stays

World Sailing events

An estimated **15.1m air miles** were travelled by event participants at the 2018 Aarhus Sailing World Championships

Visiting spectators contribute to the largest proportion of air travel emissions to attend events (41% of estimated CO2e), followed by **athletes** (39%) and **sailing team support staff** (19%)

Whilst international competition relies on the travel of athletes to compete, some key levers can be pulled to reduce the impact resulting from international travel



Encourage teams to reduce the number of support team members travelling to international event



Recruit and upskill officials locally to reduce intercontinental travel of officials for events



Encourage visiting spectators to travel in a lower impact way (e.g. by train/road for those in neighboring European countries)



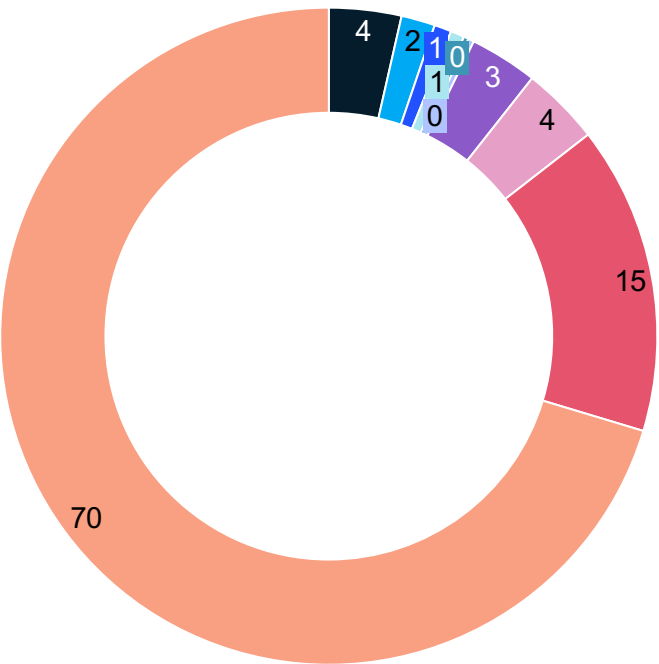
Review qualification process and event venue selection to reduce intercontinental travel

1. Based on estimated carbon footprint of an IQFoil athlete from Oceania. Key assumptions include 1 return flight to each of Europe, North America and Asia per year; and average equipment usage based Kiel Week athlete survey results

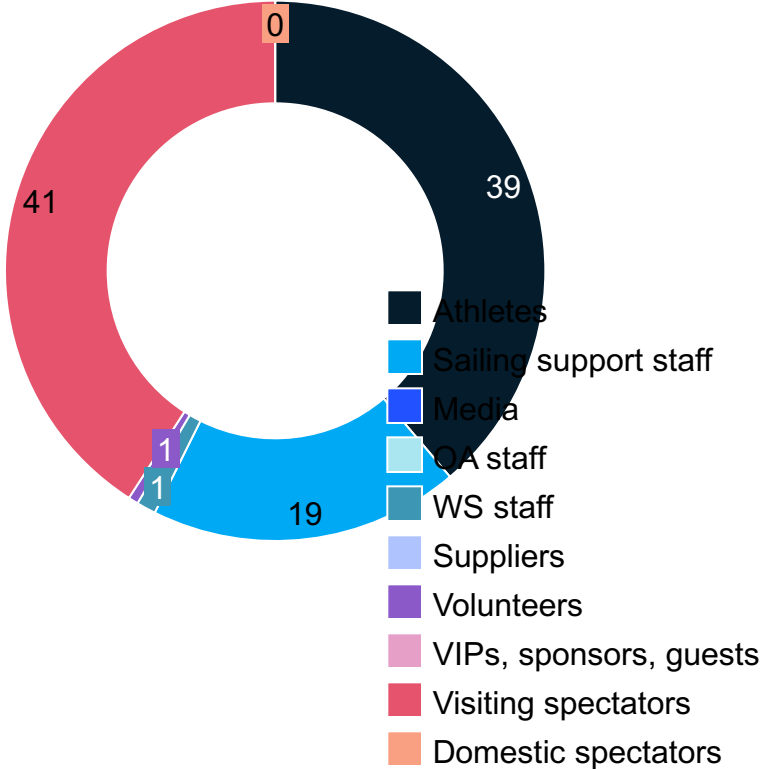
1 | Whilst international competition relies on the travel of athletes to compete, some key levers can be pulled at the event level to reduce international travel

Case study: 2018 World Sailing Championships in Aarhus, Denmark

Event participants (%)



Estimated CO2e from air travel (tonnes)



Key insights

15.1m air miles travelled to attend the Aarhus Sailing World Championships,¹ equivalent to **3024 tonnes** CO2e

Visiting spectators contribute an estimated **41% of CO2e as a result of air travel**, but only make up **15% of event participants**

Sailing team support staff contribute to an estimated **19% of CO2e** from air travel, whilst making up **2% of event participants**

Potential levers

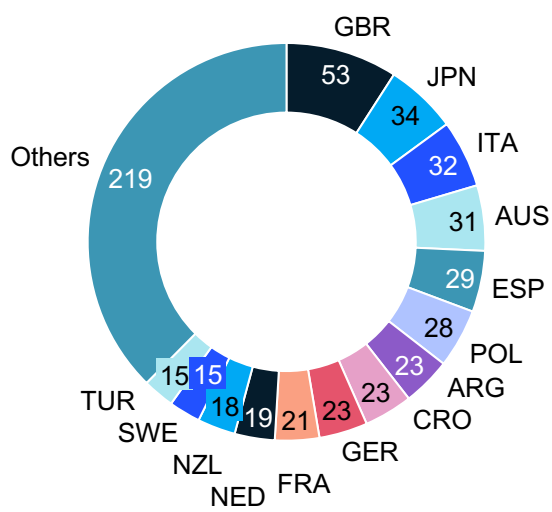
- 1 Encourage teams to reduce the number of support team members travelling to international event
- 2 Recruit and upskill officials locally to reduce intercontinental travel of officials for events
- 3 Encourage visiting spectators to travel in a lower impact way (e.g. by train/road for those in neighbouring UK companies)

1. Based on a return flight to venue from capital city of home nation

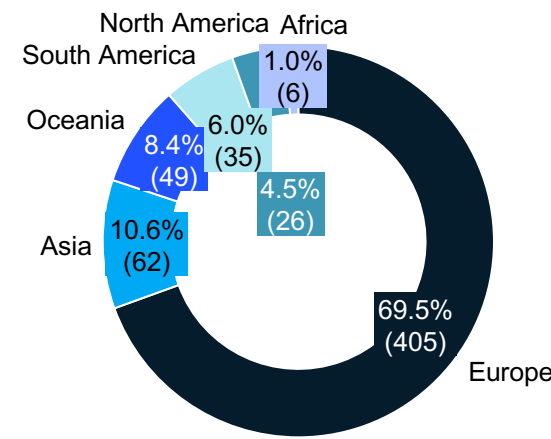
1 | The vast majority of volunteers are already locally recruited, but more progress can be made to reduce total air travel of media and sailing support staff

Aarhus Sailing World Championships 2018 event participation deep dive

Sailing support staff

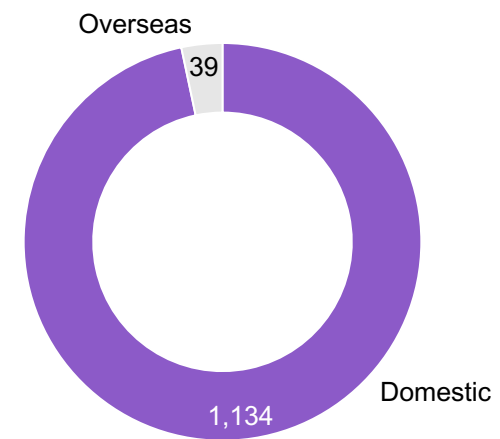


Top 4 MNAs account for 25% of sailing support staff at a typical sailing event, whilst 50% of support staff are from just 10 MNAs (1/8 of total MNAs competing)



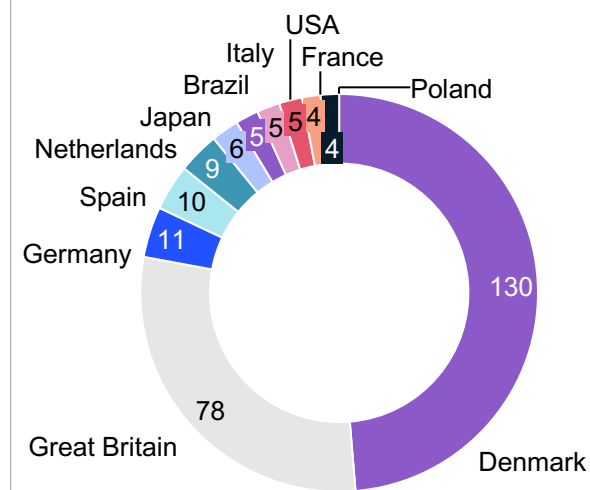
[placeholder text box]

Volunteers



[placeholder text box]

Media



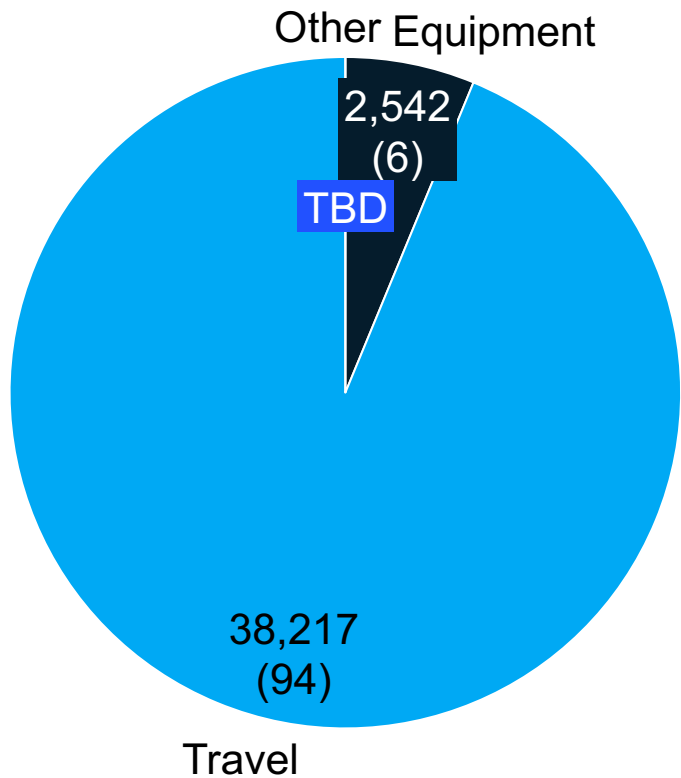
[placeholder text box]

1 | At the athlete level, intercontinental travel is the biggest driver of carbon footprint

Example carbon footprint per Quad for an IQFoil

Illustrative, not comprehensive

Estimated CO₂e (tonnes)



Assumptions

1 return flight to each of Europe, N America and Asia per year

Equipment (per Quad):

- Boards = 4.5
- Sails = 11.75
- Battens = 8.27
- Cams = 1.58
- Masts = 8.5
- Booms = 4.1
- Foils = 6

Key insights

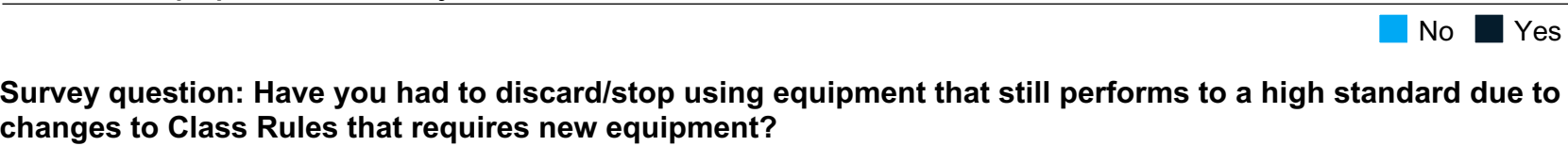
What decisions can WS make to reduce the amount of intercontinental travel of athletes during the Quad?

Potential levers

- 1 Restructure qualification process to reduce the amount of intercontinental travel required by athletes

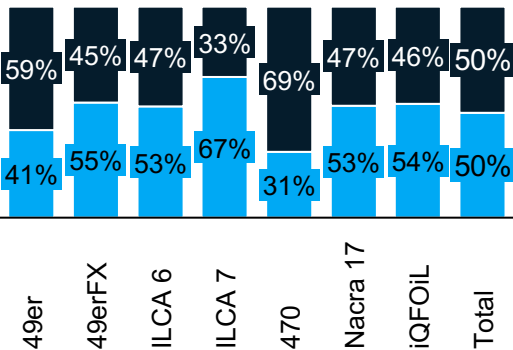
2 | There are several ways in which World Sailing could reduce the environmental impact resulting from athlete equipment usage

Athlete equipment survey results

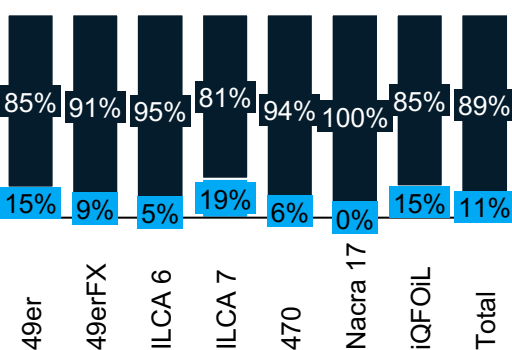


Survey question: would you support the following regulations provided it affected all competitors equally?

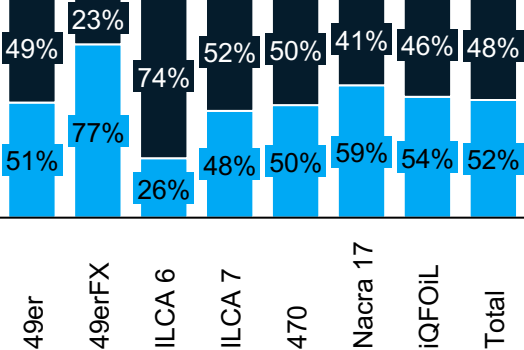
a) Limit the number of pieces of equipment per athlete per Olympic cycle?



b) Use more environmentally sustainable equipment?



a) Use of supplied equipment at events



Key insights

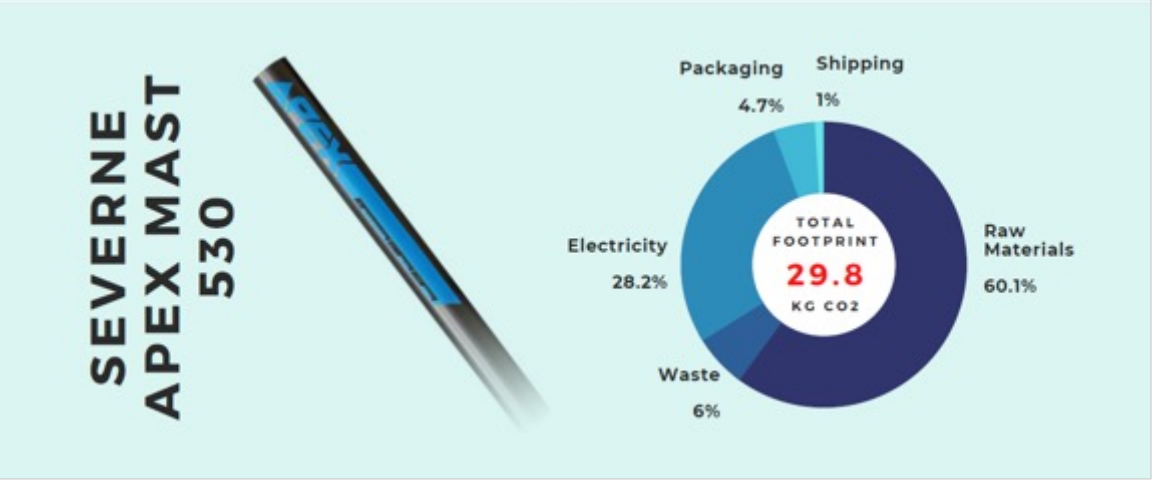
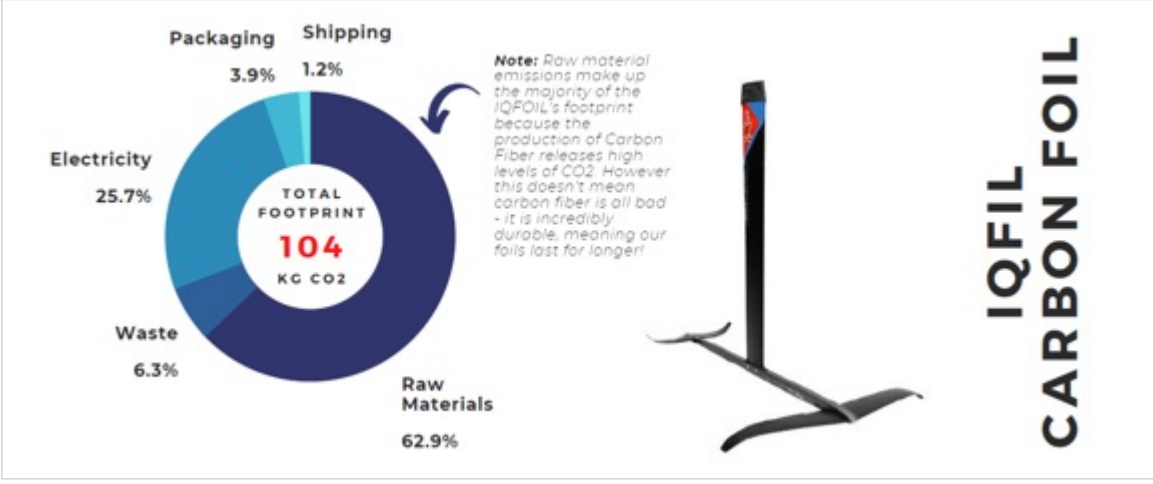
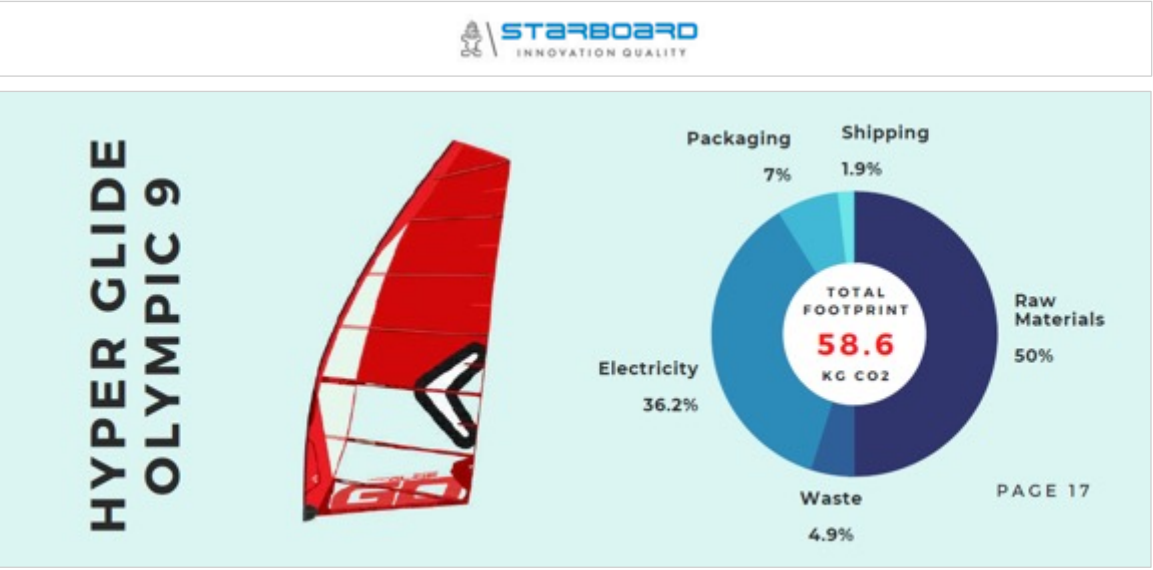
The majority of athletes have had to discard/stop using equipment that still performs to a high standard due to changes to Class Rules that requires new equipment

There is widespread support for introducing sustainability standards for equipment, whilst opinions are more divided for limiting equipment or supplying equipment

Potential levers

- 1 Improve quality of equipment / reduce frequency of breakages
- 2 Set sustainability standards for suppliers (such as minimum recycled content; renewable energy consumption)
- 3 Reduce the number of times class rules change making functioning equipment redundant

2 | Electricity and raw materials are the biggest components of the IQFoil footprint



3 | World Sailing can reduce the environmental footprint of its events by leveraging technology

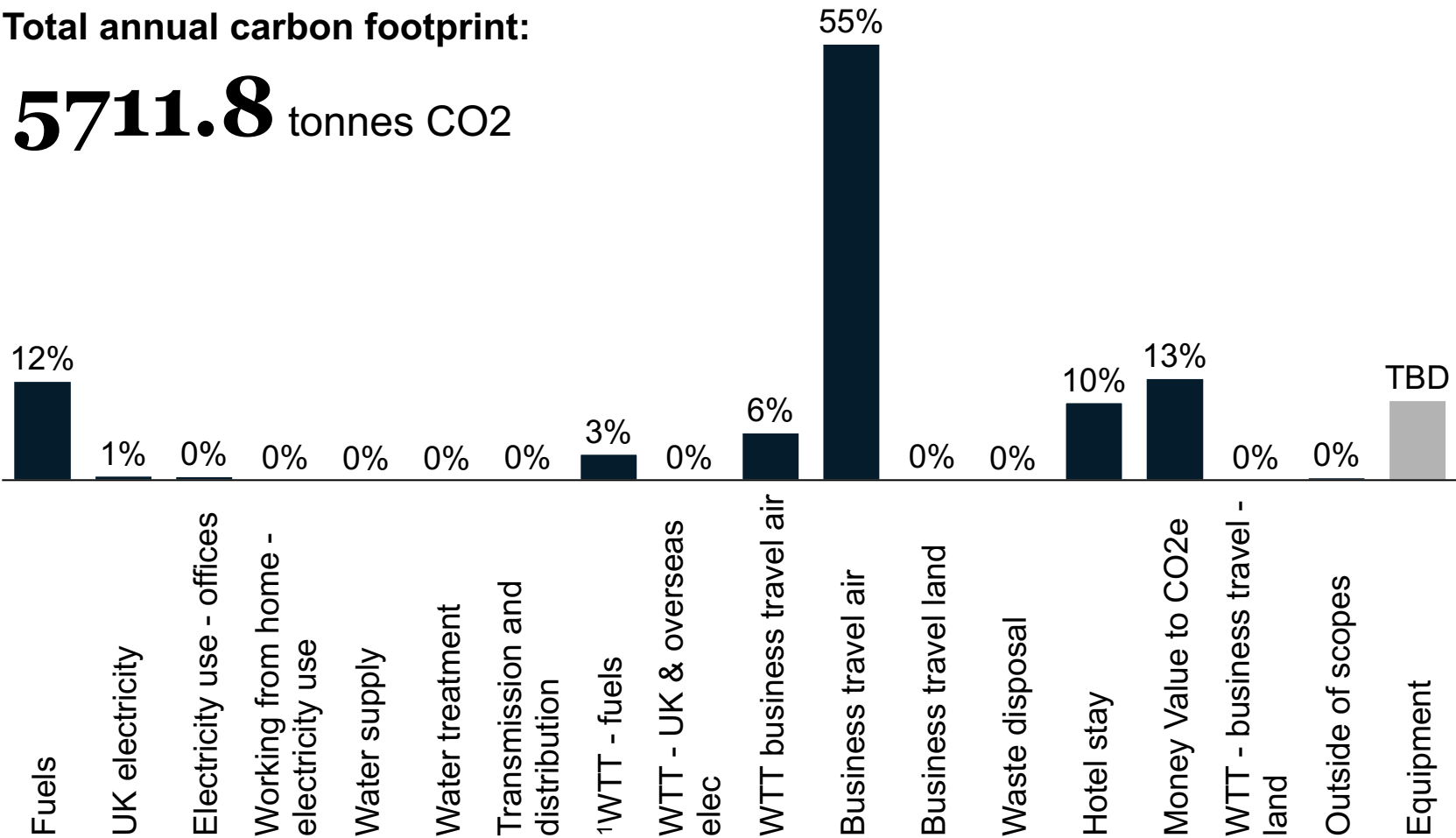
Initiative	Potential impact Fossil fuel consumption	International travel	Non-carbon based enviro. impact	Number of containers shipped
Reduce duration of races / events	↓			
Leverage technology to facilitate remote umpiring	↓	↓		↓
Shared services and resources (e.g., incl. athlete support team; sail/equipment repair; coach boats)	↓	↓		↓
Multi-event host venue agreements to facilitate local investment in renewable energy and recycling infrastructure	↓		↓	↓
Incentivise teams to introduce electric coach boats to be electric	↓			

1, 3 | Air travel and fuel consumption are the biggest parts of World Sailing’s footprint at an organisational level

Based on World Sailing’s OCW-certified carbon footprint, 2019

Total annual carbon footprint:

5711.8 tonnes CO2



Key insights

Business air travel is the biggest driver of World Sailing’s carbon footprint, followed by fuel consumption

Potential levers

Reduce intercontinental travel through:

- Recruiting and upskilling race officials umpires in each continent

Reduce amount of fuel consumption at events through:

- Reducing ratio of coach and official boats on the water to athlete boats
- Reduce number or races/duration of days of regattas
- Incentivise teams to replace some/all coach boats with electric boats

1. WTT = Well to Tank Scope 3 emissions associated with extraction, refining and transportation of raw fuels and Transmission and distribution (T&D) Scope 3 emissions associated with grid losses (the energy loss that occurs in getting the electricity from the power plant to the organisations that purchase it), are included in the footprint calculations.

Agenda

1. Marketability
2. Sustainability
3. Accessibility
4. Diversity

Appendix

- Marketability
- Sustainability
- **Accessibility and Diversity**

There are 100 countries in top sailing rankings or with previous sailing participation but a third did not join 2020 Olympics

All NOC countries

207

Member National Authorities (MNAs)
(countries eligible for participating in Olympics sailing events)

144

Countries with at least one sailing athlete in top 50% of rankings (73) or were in the Olympics in 2000-20 (27)

100

Number of unique countries competing in sailing at Olympics 2000-2020

93

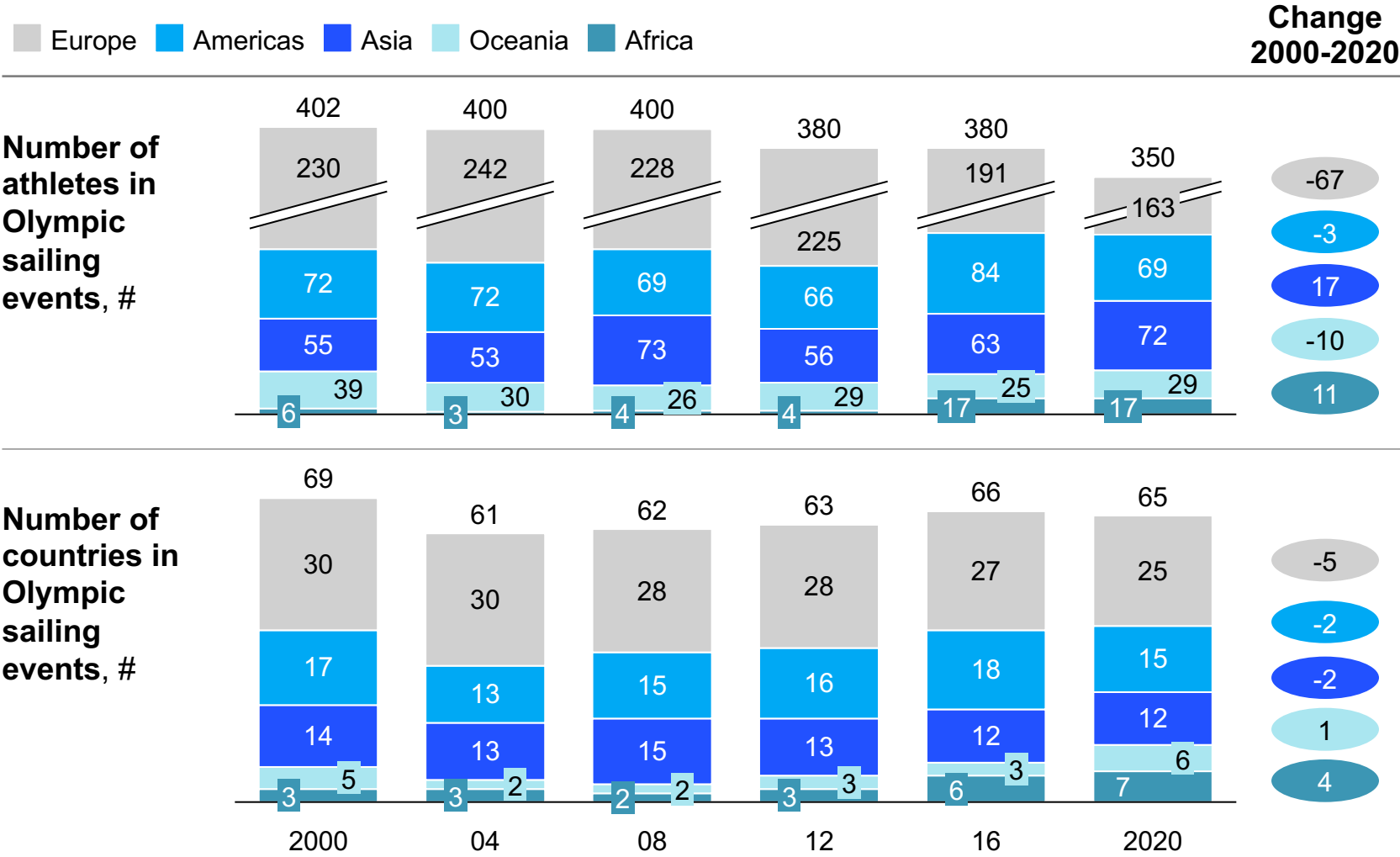
Countries with >0 sailors in 2020 Olympics

65

Overall athlete participation declining but increasing in Asia and Africa; country participation flat, up in Africa and Oceania

For discussion

Preliminary

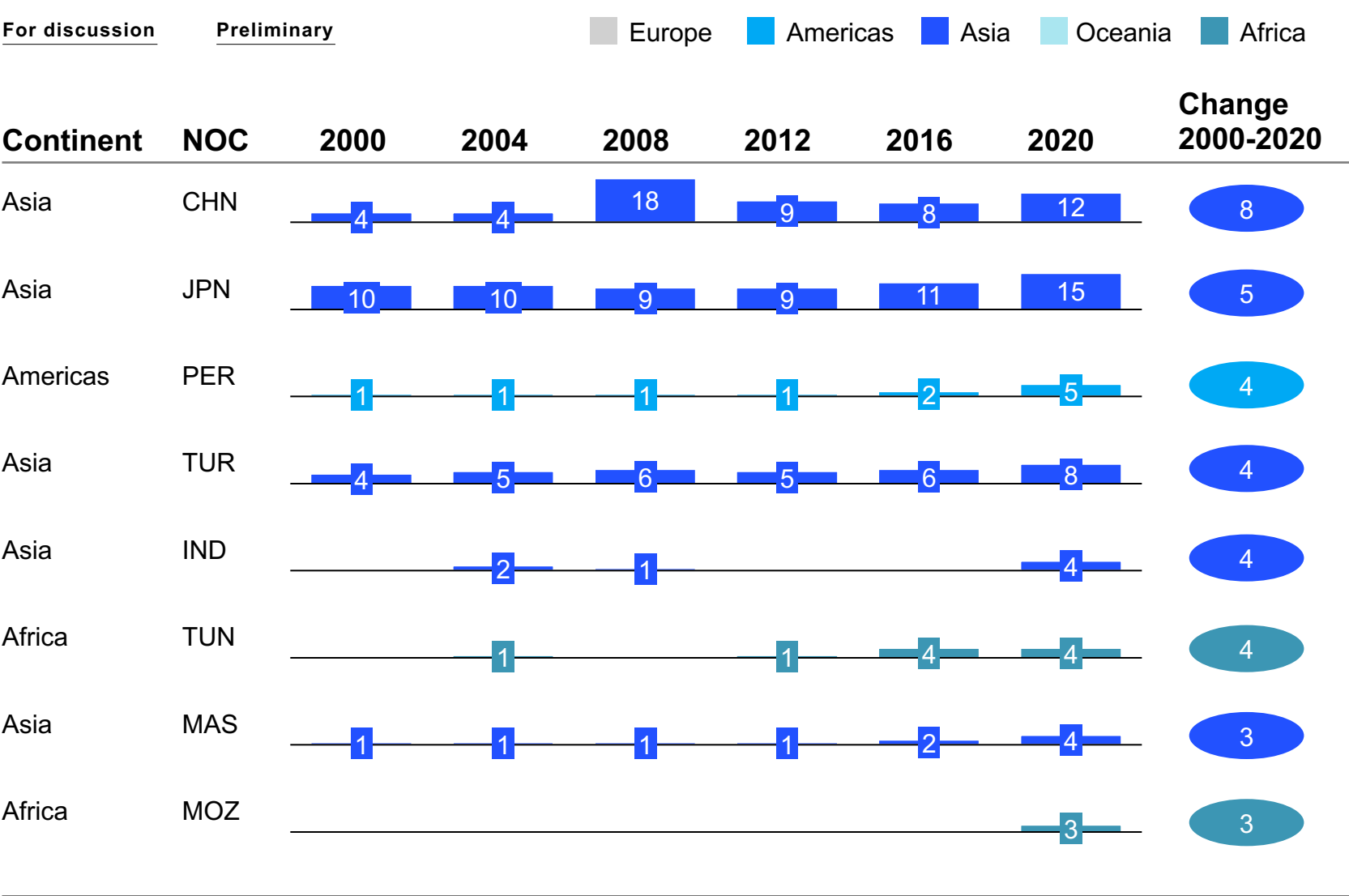


Comments

The overall decline in number of athletes driven by IOC quotas with Europe taking most of the impact and Oceania driven by stricter qualification rules in Australia and New Zealand

Participation of athletes increasing in Africa due to continental qualification rule introduced in Rio and in Asia mostly due to China and Japan hosting the games and increasing their participation

8 countries with participation increasing by 3 or more athletes in 2000-20



Comments

There has been 8 countries with participation increasing by 3 or more athletes in 2000-20

China and Japan increase due to the countries hosting the games in 2008 and 2020 with sustained increase observed for China

Mozambique with three athletes in 2020 games thanks to dedicated emerging nation program

Success of Peru, Turkey Tunisia and Malaysia to be analyzed by interviewing respective sailing associations to identify lessons for other countries

13 countries with participation declining by 3 or more athletes in 2000-20



Comments

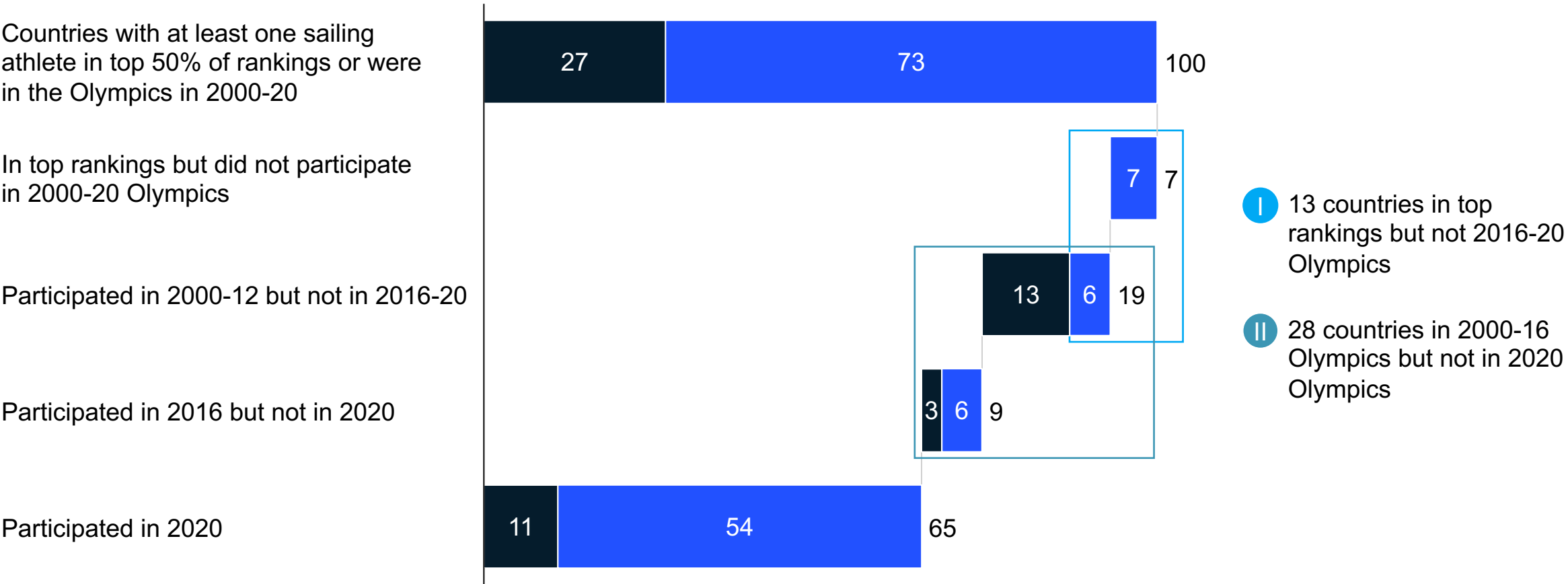
Europe (incl. Russia that is considered European as part of the quotas) most likely due to changing continental quota – other factors like prioritizing certain classes by country associations to be further investigated

Australia and New Zealand declining due to stricter qualifying rules in those countries

There are 35 countries in top rankings or with 2000-16 participation but no participation in 2020

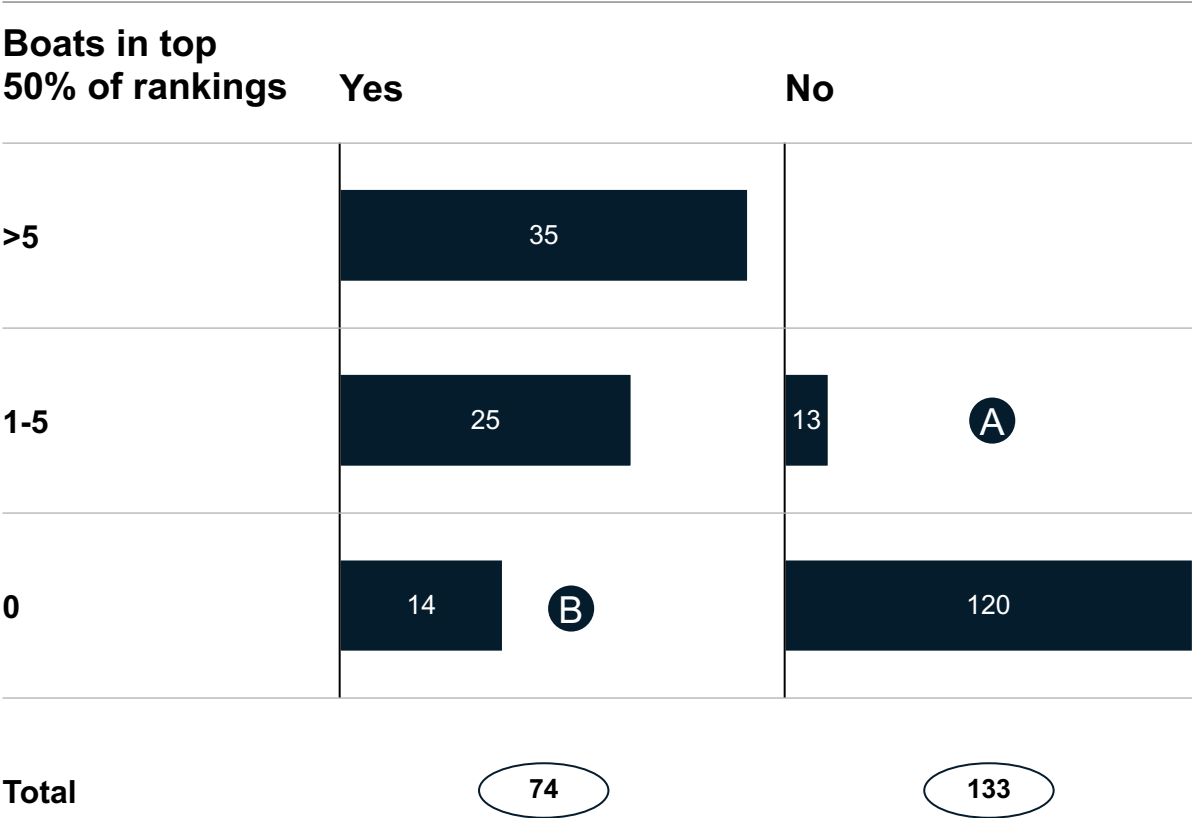
Without sailors in top rankings With sailors in top 50% rankings Detailed next

Number of countries by sailing ranking and Olympics participation,



I: There are 13 countries in top rankings but not 2016-20 Olympics

Number of countries based on 2016-20 participation



A

Countries with sailors in top rankings but no participation in 2016-20

Africa	Mauritius
Americas	Barbados
	British Virgin Islands
	Dominican Republic
	Ecuador
Asia	Bahrain
	Oman
Europe	Bulgaria
	Malta
	Monaco
	Romania
	Serbia
	Slovakia

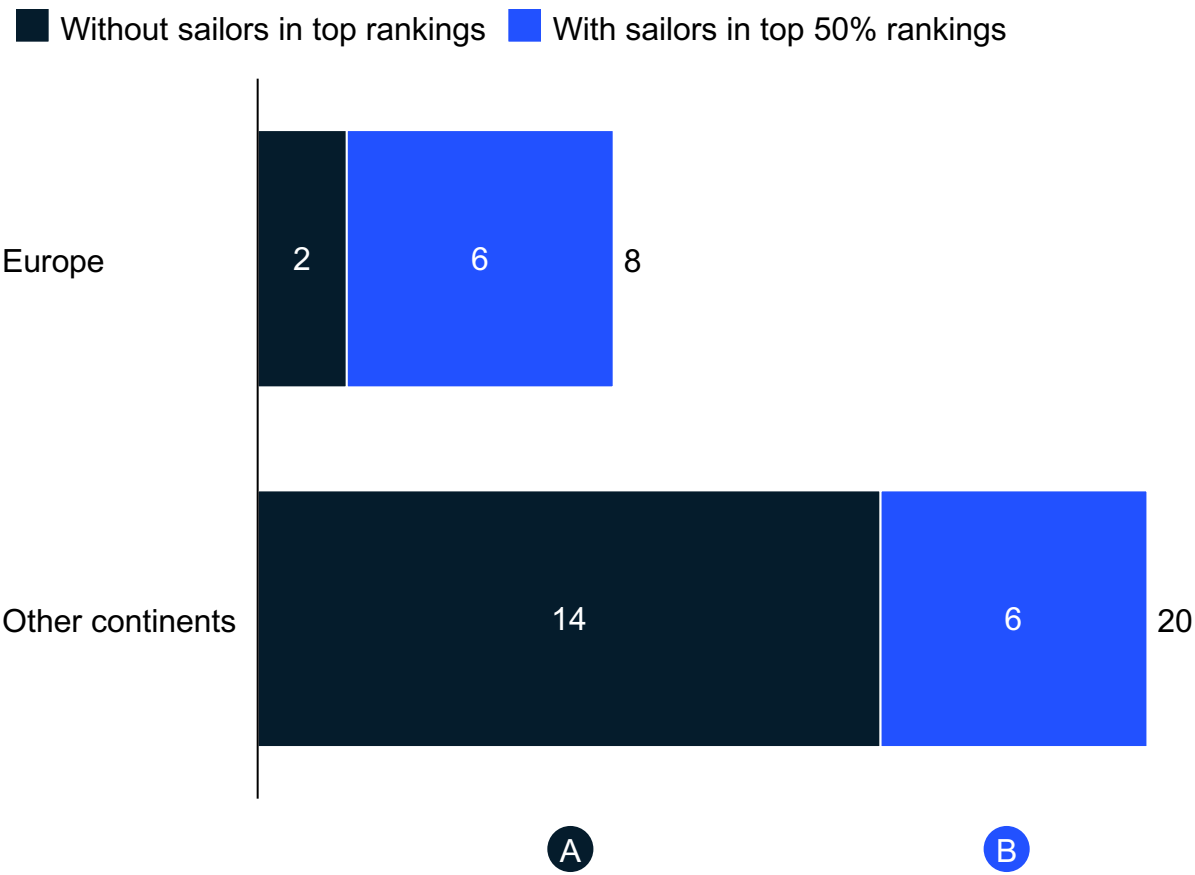
B

Countries without sailors in top rankings but with participation in 2016-20

Africa	Algeria
	Angola
	Egypt
	Mozambique
	Seychelles
	Tunisia
Americas	Cayman Islands
	Venezuela
	Virgin Islands
Oceania	American Samoa
	Cook Islands
	Fiji
	Papua New Guinea
	Western Samoa

II: There are 20 non-European countries with 2000-16 participation but no 2020 participation

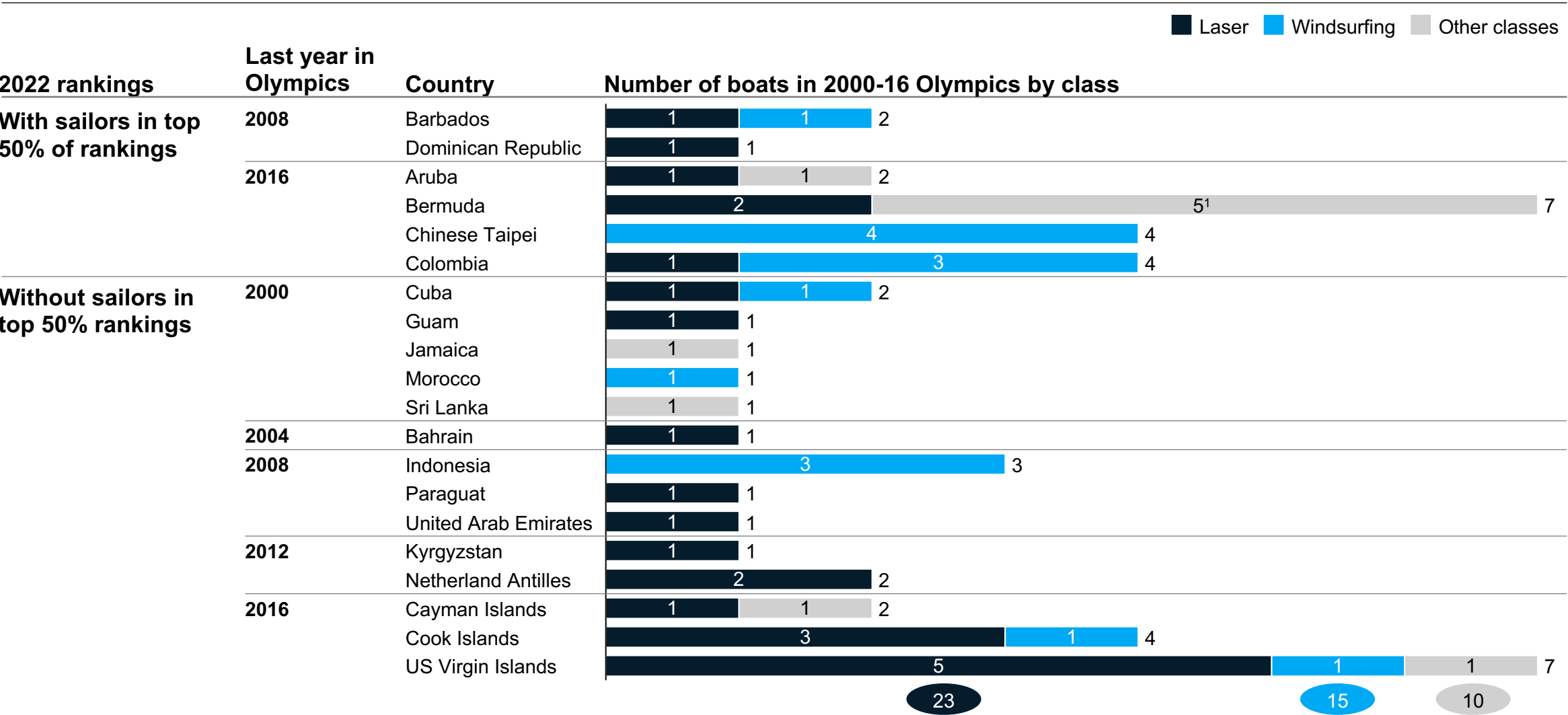
Countries with 2000-16 participation but no 2020 participation, #



Countries with no participation in 2020 Olympics but with participation in 2000-16 Olympics

A Without sailors in top 50% rankings as of 2022		B With sailors in top 50% rankings as of 2022	
Americas	Bahamas, The	Americas	Aruba
	Cayman Islands		Barbados
	Cuba		Bermuda
	Jamaica		Colombia
	Netherlands Antilles		Dominican Republic
	Paraguay		
	Virgin Islands	Asia	Taiwan
Asia	Indonesia		
	Kyrgyzstan		
	Sri Lanka		
	United Arab Emirates		
Oceania	Cook Islands	Africa	
	Guam		
Africa			Morocco

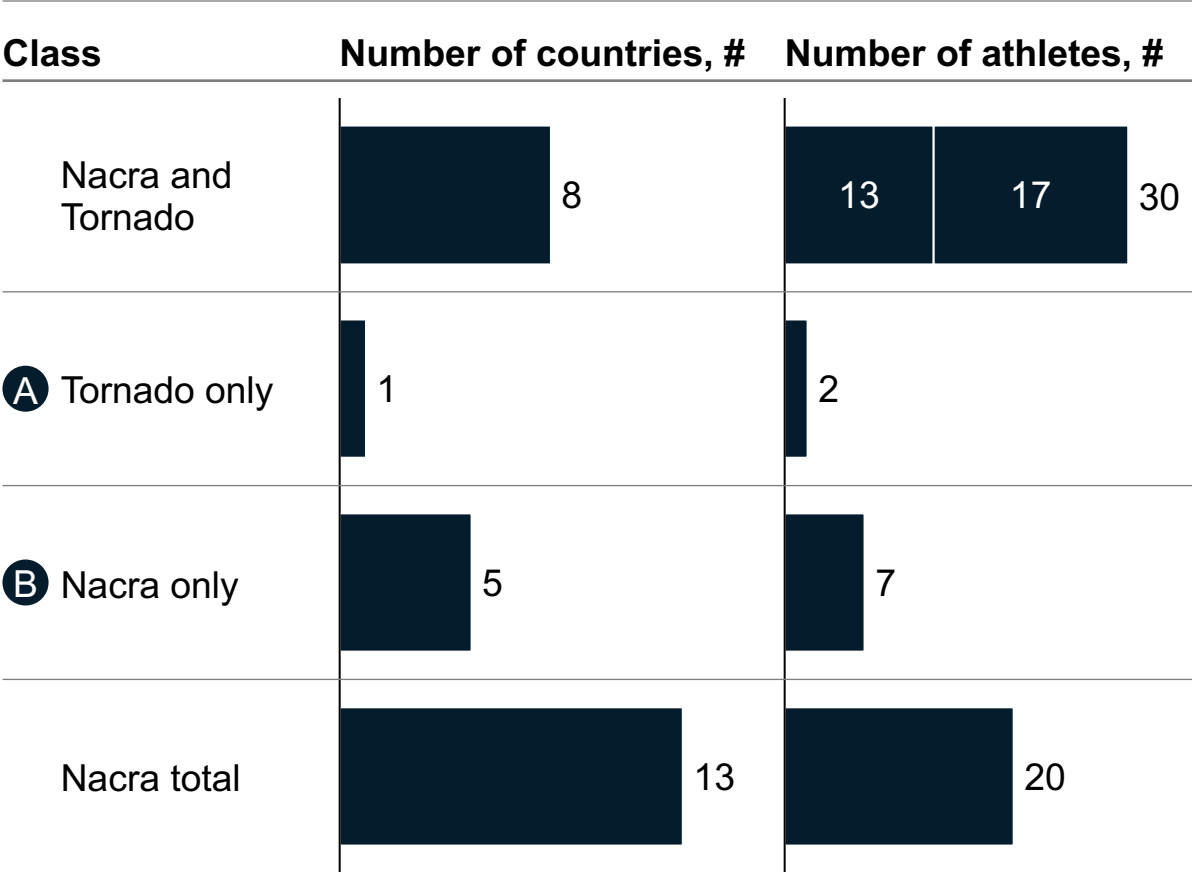
I+II: 20 non-European countries with 2000-16 but not 2020 participation competed mostly in laser and windsurfing



1. 2 times Star and 1 time each with Yngling, 49er and Europe

5 countries that were not participating in Tornado Olympics have participated in Nacra Olympics

Catamaran classes participation in 2000-20 Olympics, non-European countries only



A

Countries that participated in Tornado Olympics but not in Nacra in 2000-20

Europe Russia

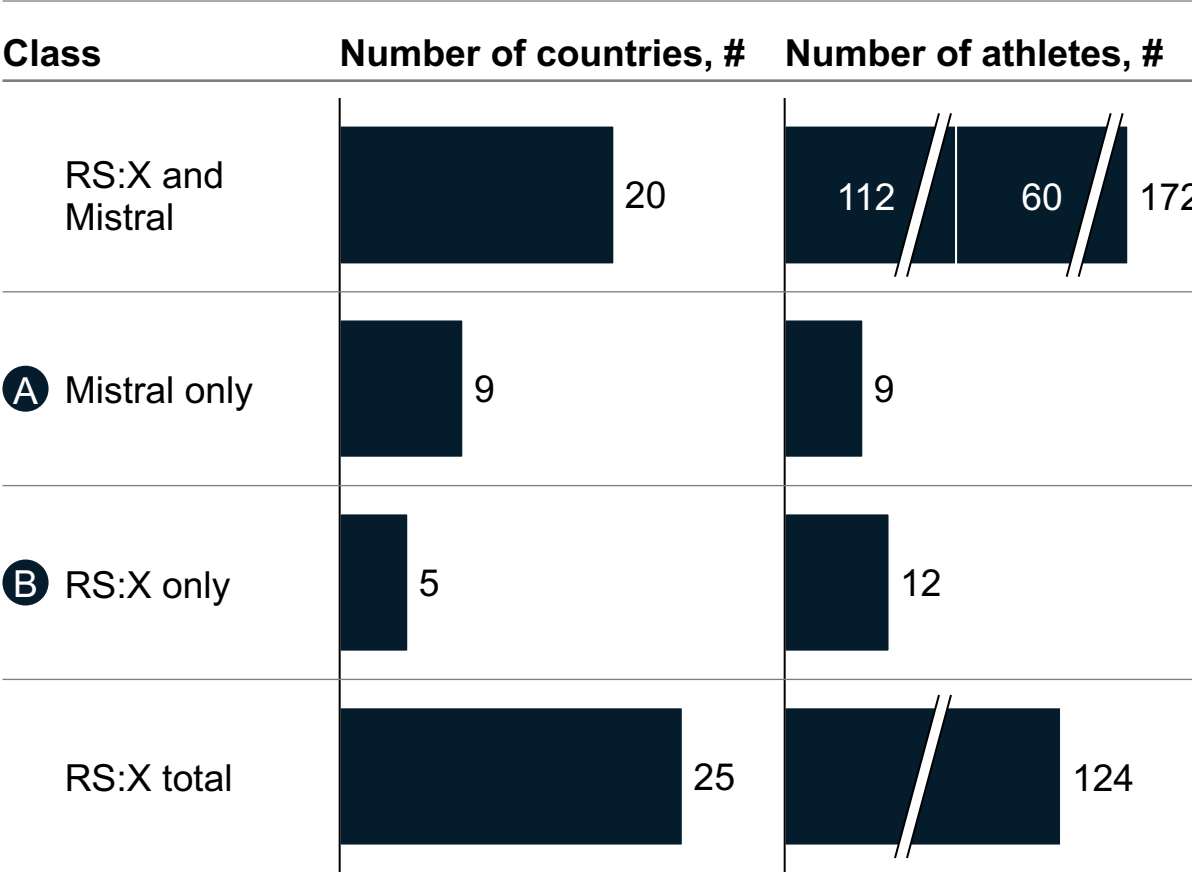
B

Countries that participated in Nacra Olympics but not in Tornado in 2000-20

Americas Aruba
Uruguay
Africa Tunisia
Asia Japan
Singapore

9 non-European countries stopped participating in windsurfing after Mistral was removed but all were one-offs in 2000-04

Windsurfing classes participation in 2000-20 Olympics, non-European countries only



A

Countries that participated in Mistral Olympics but not in RS:X in 2000-20

- Americas
 - Barbados
 - Cuba
 - Puerto Rico
 - Uruguay
 - US Virgin Islands
- Africa
 - Morocco
 - Tunisia
- Oceania
 - Cook Islands
 - Fiji

All countries with only 1 Mistral sailor in 2000-04

B

Countries that participated in RS:X Olympics but not in Mistral in 2000-20

- Americas
 - Colombia
 - Peru
- Africa
 - Algeria
 - Egypt
- Asia
 - Singapore

Algeria with 4 sailors, Colombia and Singapore with 3 in 2008-20

Case studies: interviews with best practice countries

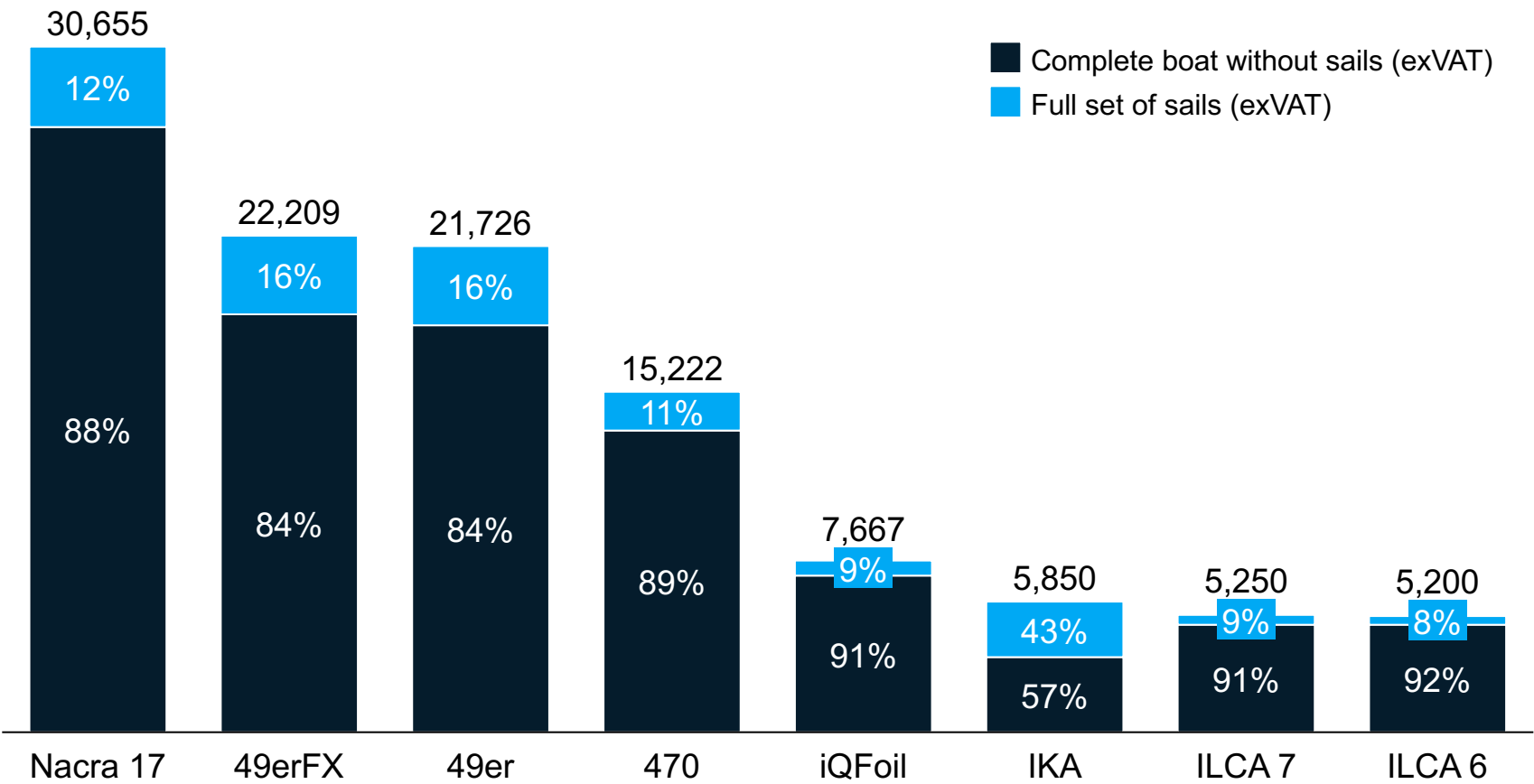
Preliminary	
Country	Rationale to include in the best practice group
Seychelles St Lucia	Island nations that despite having small populations (and low GDP per capita in case of St Lucia), have a higher average number of athletes participating in the Olympics 2016-2020 than expected (Seychelles with 2 and St Lucia with 1.5)
Uruguay	Higher than expected number of athletes participating in the Olympics (avg. of 3.5 in 2016-20) despite comparatively small population of 3.5m and middle GDP per capita of \$21,600
Angola Algeria Mozambique Tunisia	Some athlete participation in Olympic sailing (average of 1.5-4 athletes in 2016-20) despite low-medium GDP per capita (\$1-13k), Tunisia and Mozambique with athlete participation increased by 3-4 in last several quads
Malaysia India Peru	Countries that have increase athlete participation by at least 3 athletes in 2000-20 period

Questions to ask each country

- Funding:
 - What is the source of the Olympic sailing program?
 - Is the funding consistent or growing over the years? What is the reason behind that?
- Training and support
 - What development pathways exist for youth sailors in the country?
 - Are there any international coaches in the country or opportunities to train with international sailors? How are they organized?
 - Are there any international sailing events in Olympics classes stopping in the country?
 - What infrastructure exists to enable sailing (physical or otherwise), e.g., sailing clubs, marinas, suitable locations for all-year-round sailing/training, RIBs/support boats, equipment, coaches, skills to repair equipment
 - What, if any, professional sailing opportunities exist in the country beyond Olympic class sailing?
- Talent concentration
 - Is there a concentration of participation in a specific class represented in the Olympics? If yes, why do you think that is?
 - How is athlete talent distributed across the country? (i.e., concentrated in one location or dispersed across the country)
 - Is there a high share of “legacy” sailors, e.g., sailors with sailing parents or from families with specific background or location?
- Other
 - What are any other areas that led to higher sailing participation in Olympics when compared to the past or similar countries?

IKA and iQFoil have comparable or lower equipment prices to ICLA (Laser)

Price ex. VAT in GBP¹ for Olympic class equipment



Key insights

Hull/board and fittings (e.g., mast, foils) account for the vast majority of equipment cost, with sails accounting for only 8-16% of the total package cost (except for the IKA)

Despite their high-tech foiling nature, the **iQFoil (foiling windsurfer)** has the **lowest on-the-water cost** of any Olympic class

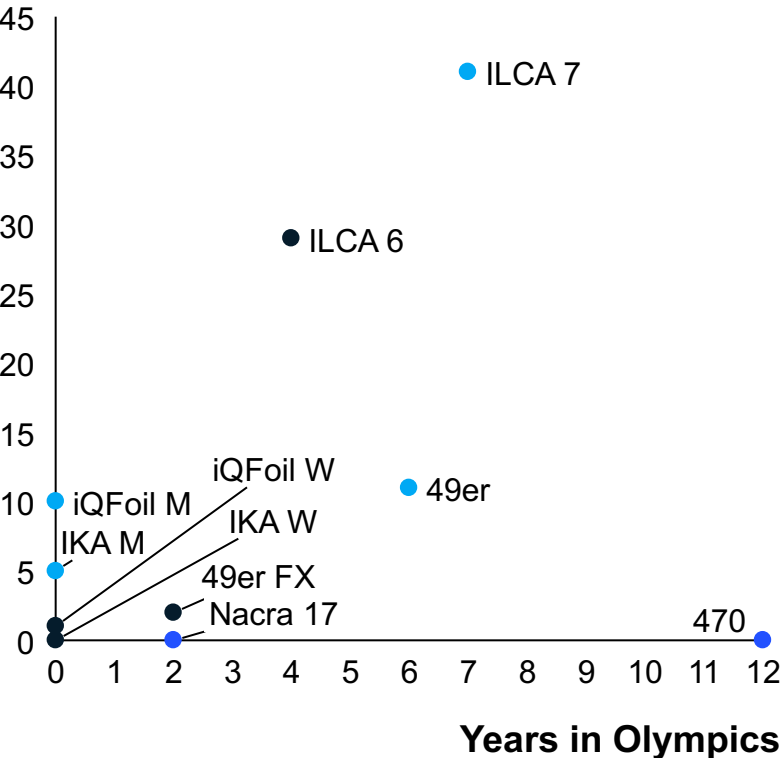
NB: these are the annual report costs for 2020 – it is likely that costs have increased significantly since then due to a) interruption to supply chains due to covid, and b) increased costs of inputs and manufacturing

1. Where prices listed in local currency, the following conversions rates have been used: 1 EURO= 0.86 GBP, 1USD= 0.82 GBP, 1AUS= 0.57, 1NZD= 0.51, 1CHF= 0.84

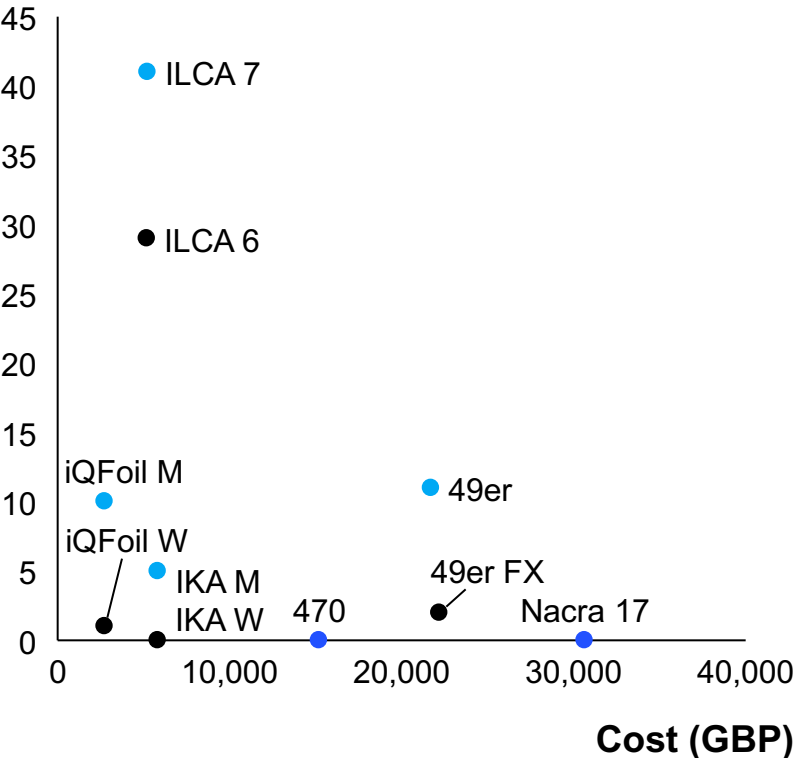
Cost of equipment and longevity of equipment at Games are the biggest drivers of EM inclusion in top 50% of rankings

● Women's classes ● Men's classes ● Mixed gender classes

Number of Emerging Nation boats in top 50% of world rankings



Number of Emerging Nation boats in top 50% of world rankings



NB: IKA (kiteboarding) and iQFoil are new classes introduced for Paris 2024

Key insights

Participation of **female emerging nation athletes** lags the equivalent **male class** in every instance

Classes with **higher equipment costs** have **lower emerging nation** participation

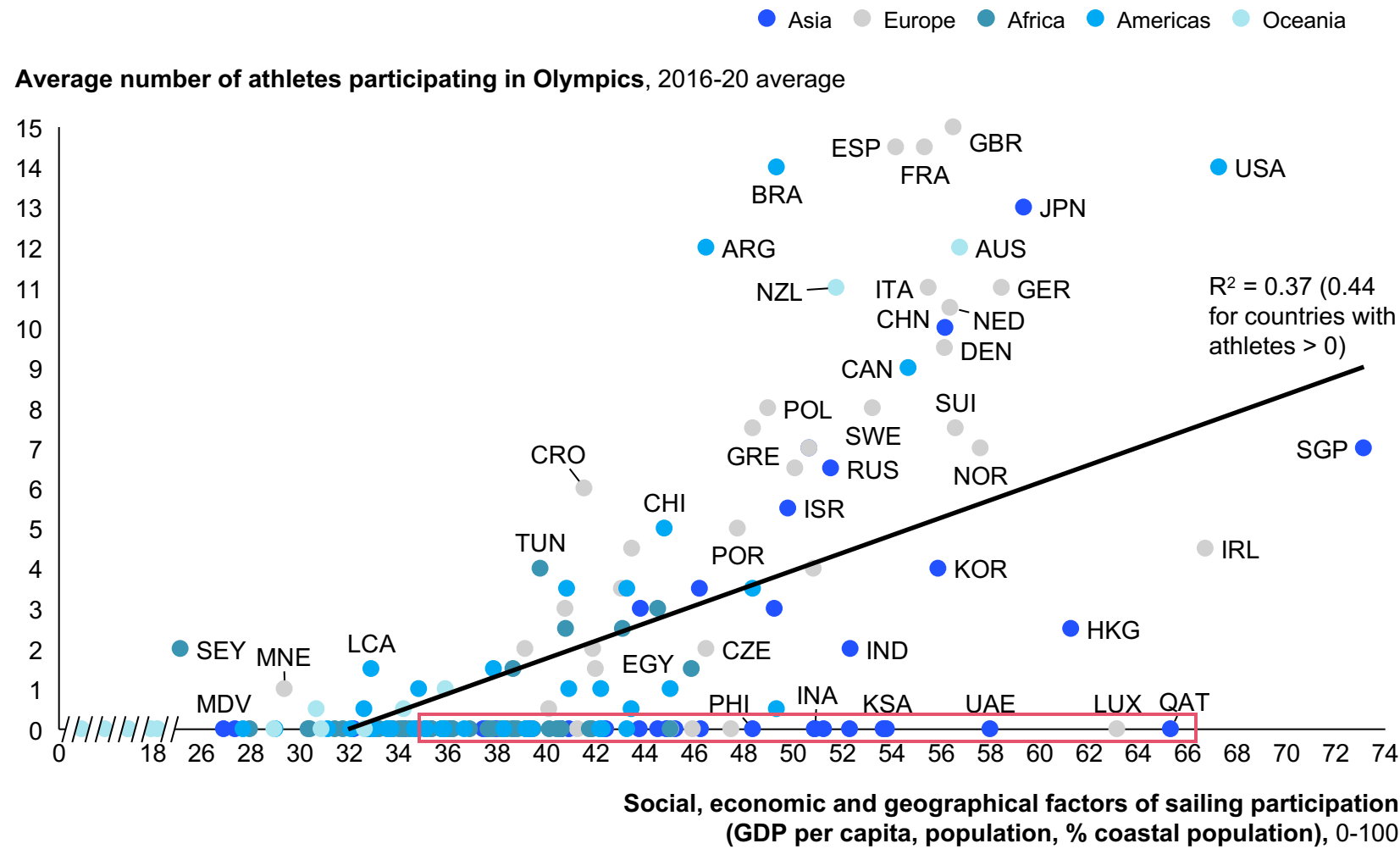
Longer standing classes at the Olympics have **higher participation from emerging nations**, with the exception of the 470 (this may be due to the 470 mixed class replacing the men's and women's 470 classes for 2024)

Despite being new to the Olympics, the **kiteboarding and foiling windsurf classes** already have **emerging nation athletes ranking in the top 50%** (this may be due to the lower barriers to entry in terms of cost and infrastructure)

GDP, population and coast are predictive of athlete participation and can be used for prioritizing activation

For discussion

Preliminary



The current model uses the following factors for athlete participation:

- Population logarithm (50%)
- GDP per capita (40%)
- Share of population living within 10km of the coast (10%)

Other metrics can be used to enhance the analysis if available:

- Disposable income
- Number of boats per country
- Number of sailing clubs

The methodology can be used for prioritizing country activation, e.g.,

- Increasing participation of countries with athletes but below predicted line
- Getting first athletes for countries with scores >35
- Deprioritizing active efforts for countries with score <35 and no participating athletes