2014 RECREATIONAL BOATING Statistical Abstract
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The 2014 Recreational Boating Statistical Abstract is a comprehensive summary of statistics on the recreational boating industry in the United States. The data herein has been collected by the National Marine Manufacturers Association (NMMA) from a coalition of sources brought together by the NMMA Industry Statistics & Research Department.

The report presents detailed data for boat registrations, sales, expenditures, participation and the retail market. Boating Population includes boating participation, ownership, usage and behavior data from boater participation and boat owner surveys conducted by Foresight Research in late 2014. The Import/Export section features an in-depth look at the import/export marketplace focusing on product categories, trade partners and regional analysis.

Section 19 details the results of a consumer survey conducted by Foresight Research in 2014 on boaters’ marine accessory spending habits.

NMMA’s Industry Statistics & Research Department analyzed and formatted all data in this report. The complete list of sources can be found on page 336.

What’s more, you’ll notice that this year we split what used to be Section 1 (Population) into two separate sections: Population (Section 1) and Ownership (Section 2) to better organize this data for your use.
The 2014 Recreational Boating Statistical Abstract is a comprehensive summary of statistics on the recreational boating industry in the United States. The data herein has been collected by the National Marine Manufacturers Association (NMMA) from a coalition of sources brought together by the NMMA Industry Statistics & Research Department.

This report presents detailed data for boat registrations; boat, engine and accessory sales; expenditures; participation; and the retail market. What's more, it features an in-depth look at the import/export marketplace focusing on product categories, trade partners and regional analysis.

NMMA Industry Statistics & Research Department analyzed and formatted all data in this report. The complete list of sources can be found on page 334.

Below is an executive summary of key data points from the comprehensive report. This sampling of data is shared widely across the industry and with the media to provide a snapshot of the scope of the U.S. recreational boating industry.

- **U.S. expenditures on boats, engines, accessories, and related costs** totaled $35.4 billion in 2014.
- **New boat sales** were up 0.5% to 534,500 units in 2014.
- **New traditional powerboat sales** increased 6.4% to 171,500 units in 2014.
- **New sailboats sold at retail** increased 33.9% to 7,500 units.
- **New personal watercraft sales** increased 21.6% to 47,900 units.
- **New boat imports** totaled $2.3 billion, up 7.2% in 2014; units were up 17.7% to 794,174.
- **New boat exports** totaled $2.1 billion, down 0.6% in 2014; units were down 6.7% to 208,532.
- **Total engine sales**, including topline, outboard, inboard and sterndrive engines, were 243,200 units, up 3.4% in 2014.
- **Outboard engines sales** were up 4.5% to 218,400 units; retail sales reached $2.5 billion, up 8.6%.
- **Aftermarket accessory sales** totaled $5.6 billion in 2014, an increase of 14.7%.
- **Americans are taking to the water**: 35.7% of the U.S. adult population—87.3 million Americans—participated in recreational boating at least once in 2014.
- Boats are uniquely **made in America**: 94.9% of powerboats sold in the U.S. are made in the U.S.
- There were an estimated 12 million **registered boats** in the U.S. in 2014.
- 95% of boats on the water (powerboats, personal watercraft, and sailboats) in the U.S. are less than 26 feet.
- An estimated 940,500 **pre-owned boats** (powerboats, personal watercraft, and sailboats) were sold in 2014.
- Boating is primarily a middle-class lifestyle as 71.5% of American boat owners have a **household income less than $100,000**.
The 2014 Recreational Boating Statistical Abstract is a comprehensive summary of statistics on the recreational boating industry in the United States. The data herein has been collected by the National Marine Manufacturers Association (NMMA) from a variety of sources, including primary research studies commissioned by the NMMA Industry Statistics & Research Department.

**METHODOLOGY**

**Participation Study (Section 1)**
Internet survey of 3,100 nationally representative households to measure incidence rates of various levels of boating participation conducted annually in the Fall/Winter. The study was conducted by the Recreational Marine Research Center prior to 2010 and conducted by Foresight Research henceforth, using the Survey Sampling Inc. panel.

**Ownership Study (Section 2)**
Internet survey of 3,100 nationally representative households and an oversample of 2,000 boat owners to measure incidence rates of various levels of boat ownership conducted annually in the Fall/Winter. The study was conducted by the Recreational Marine Research Center prior to 2010 and conducted by Foresight Research henceforth using the Survey Sampling Inc. panel.

**Economic Impact Study (Section 3)**
Study conducted by the Recreational Marine Research Center in 2012 based on an input-output economic model (IMPLAN) to estimate the impact boating has state economies. NMMA plans to replicate this study every 3–5 years, with the next update slated for 2016.

**Retail Market (Section 4)**
Estimates of retail unit and dollar sales are derived from new boat registrations and average prices reported by NMMA's control group of boat manufacturers.

**Pre-Owned Study (Section 5)**
Study conducted annually by Info-Link, estimating sales (units and dollars) of pre-owned boats based on state registrations of recreational boats.

**Registration/Documented Vessel (Section 7)**
Registrations of recreational boats are collected by the states and aggregated by the Coast Guard that uses the data to allocate funds from the Aquatic Resources Trust. Documented vessels are part of a national registration administered separately by the USCG.

**Export/Import (Section 8)**
U.S. international trade statistics are collected by the U.S. Department of Commerce and reported to the U.S. International Trade Commission. The export and import data is analyzed by harmonized tariff schedule codes specific to recreational boats and marine engines.

**Accessory Study (Section 19)**
Internet survey of 3,000 U.S. boat owning households to measure accessory buying behavior. Survey is conducted by Foresight Research annually in the Fall/Winter using a national internet panel.
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1.1 Participation

Of the 242.5 million adults living in the United States in 2014, 35.7% or 87.3 million people participated in recreational boating at least once during the year, relatively unchanged from 2013. Since 2011, boating participation has ranged from 34.8% to 37.8% of the population.

SOURCE: FORESIGHT RESEARCH/NMMA/RMRC

TABLE 1.1 Adults 18+ who participate in recreational boating

<table>
<thead>
<tr>
<th>YEAR</th>
<th>NO. OF ADULTS GOING BOATING (MILLIONS)</th>
<th>% OF 18+ WHO WENT BOATING</th>
</tr>
</thead>
<tbody>
<tr>
<td>1990</td>
<td>67.4</td>
<td>36.5%</td>
</tr>
<tr>
<td>1991</td>
<td>67.2</td>
<td>36.3%</td>
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<tr>
<td>1992</td>
<td>67.9</td>
<td>36.1%</td>
</tr>
<tr>
<td>1993</td>
<td>68.7</td>
<td>36.2%</td>
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<tr>
<td>1994</td>
<td>69.6</td>
<td>36.2%</td>
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<tr>
<td>1995</td>
<td>70.0</td>
<td>35.6%</td>
</tr>
<tr>
<td>1996</td>
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<tr>
<td>1997</td>
<td>71.3</td>
<td>35.8%</td>
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<tr>
<td>1998</td>
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</tr>
<tr>
<td>1999</td>
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<tr>
<td>2000</td>
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<td>2001</td>
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<td>2003</td>
<td>63.0</td>
<td>28.9%</td>
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<tr>
<td>2004</td>
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</tr>
<tr>
<td>2005</td>
<td>57.9</td>
<td>26.0%</td>
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<tr>
<td>2006</td>
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<td>2007</td>
<td>66.4</td>
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<td>2008</td>
<td>70.1</td>
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<td>28.3%</td>
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<td>2010</td>
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<td>2011</td>
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<td>2012</td>
<td>87.8</td>
<td>37.8%</td>
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<tr>
<td>2013</td>
<td>88.5</td>
<td>36.6%</td>
</tr>
<tr>
<td>2014</td>
<td>87.3</td>
<td>35.7%</td>
</tr>
</tbody>
</table>
6.6 Distribution of new powerboat, engine, trailer and accessory purchases by state

Consumers spent $16.4 billion on new powerboats, outboard engines, boat trailers and aftermarket accessories collectively in 2014, up 12.3% from 2013.

Florida again ranked first in total expenditures for new powerboats, outboard engines, boat trailers and aftermarket accessories. Spending in Florida increased 22.5% in 2014 compared to 2013.

**SOURCE: NMMA**

### TABLE 6.6 Distribution of new powerboat, engine, trailer and accessory purchases by state

<table>
<thead>
<tr>
<th>STATE</th>
<th>POWERBOATS</th>
<th>OUTBOARD ENGINES</th>
<th>BOAT TRAILERS</th>
<th>AFTERMARKET ACCESSORIES</th>
<th>2014 TOTAL</th>
<th>2013 TOTAL</th>
<th>2012 TOTAL</th>
<th>2011 TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL</td>
<td>$7,930,890,675</td>
<td>$2,529,684,894</td>
<td>$291,378,068</td>
<td>$5,640,000,000</td>
<td>$16,391,953,637</td>
<td>12.3%</td>
<td>$14,596,737,710</td>
<td>$14,419,561,350</td>
</tr>
</tbody>
</table>

**POWERBOATS ENGINES TRAILERS**

<table>
<thead>
<tr>
<th>STATE</th>
<th>POWERBOATS</th>
<th>OUTBOARD ENGINES</th>
<th>BOAT TRAILERS</th>
<th>AFTERMARKET ACCESSORIES</th>
<th>2014 TOTAL</th>
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<th>2011 TOTAL</th>
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</tr>
</tbody>
</table>

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7.1 Total recreational boats in use

The total number of recreational boats in use during 2014 declined 0.6% to 15.8 million.

SOURCE: USCG

TABLE 7.1 Total recreational boats in use

<table>
<thead>
<tr>
<th>YEAR</th>
<th>REGISTERED/DOCUMENTED BOATS (MILLIONS)</th>
<th>NON-REGISTERED BOATS (MILLIONS)</th>
<th>TOTAL (MILLIONS)</th>
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<tbody>
<tr>
<td>1989</td>
<td>10.8</td>
<td>4.9</td>
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<tr>
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<td>11.0</td>
<td>5.0</td>
<td>16.0</td>
</tr>
<tr>
<td>1991</td>
<td>11.1</td>
<td>5.2</td>
<td>16.3</td>
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<td>1992</td>
<td>11.1</td>
<td>5.1</td>
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<tr>
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CHART 7.1 Total recreational boats in use

- NON-REGISTERED BOATS
- REGISTERED/DOCUMENTED BOATS

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### 7.2 Recreational boats in use by type

Outboard boats were the most popular for the eighteenth consecutive year. Of the 15.8 million boats on the water in 2014, 49.7% were outboard boats.

**SOURCE: USCG**

**TABLE 7.2 Recreational boats in use by type**

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<th>STERNDRIVE BOATS (MILLIONS)</th>
<th>PERSONAL WATERCRAFT (MILLIONS)</th>
<th>SAILBOATS (MILLIONS)</th>
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**2014 est.** 7.9 1.0 1.4 1.2 1.6 2.8 15.8

**CHART 7.2 Recreational boats in use by type**

- OUTBOARD BOATS
- INBOARD BOATS
- STERNDRIVE BOATS
- PERSONAL WATERCRAFT
- SAILBOATS
- OTHER
- TOTAL

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