

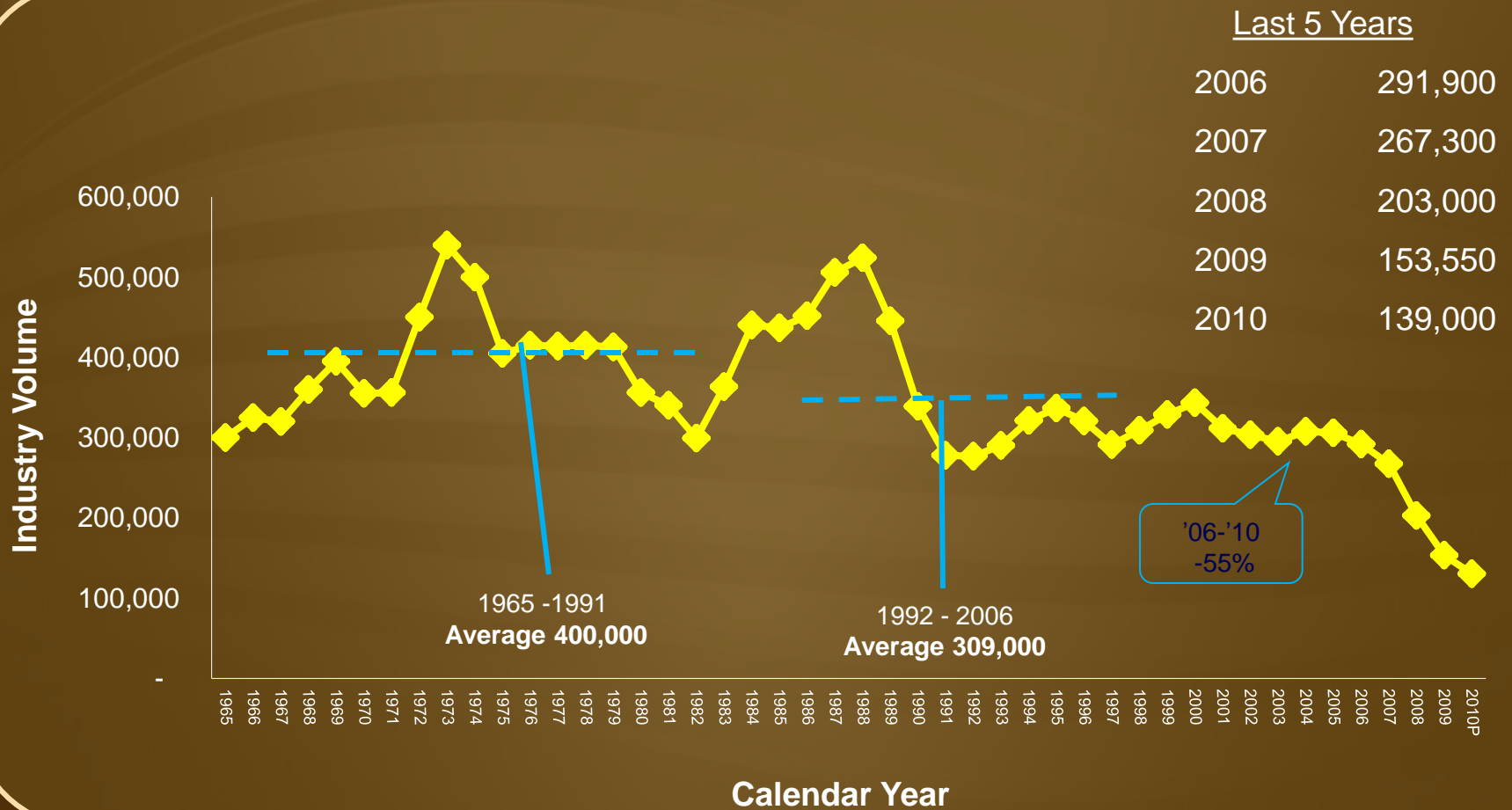
Thom Dammrich

**President,
National Marine Manufacturers Association**

Recreational Boating Industry Trends

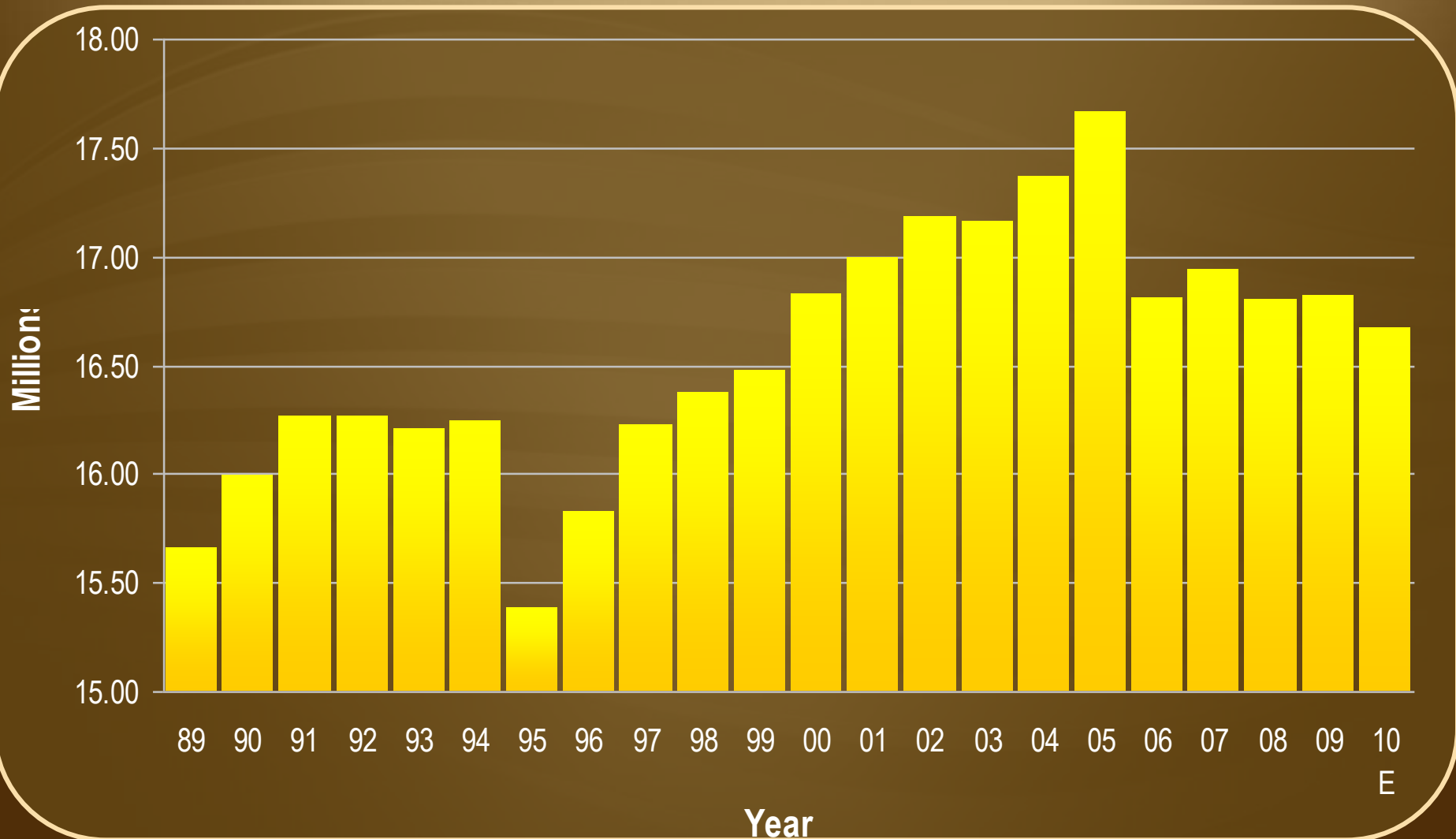


U.S. Industry Retail Powerboats (1965 – 2010)



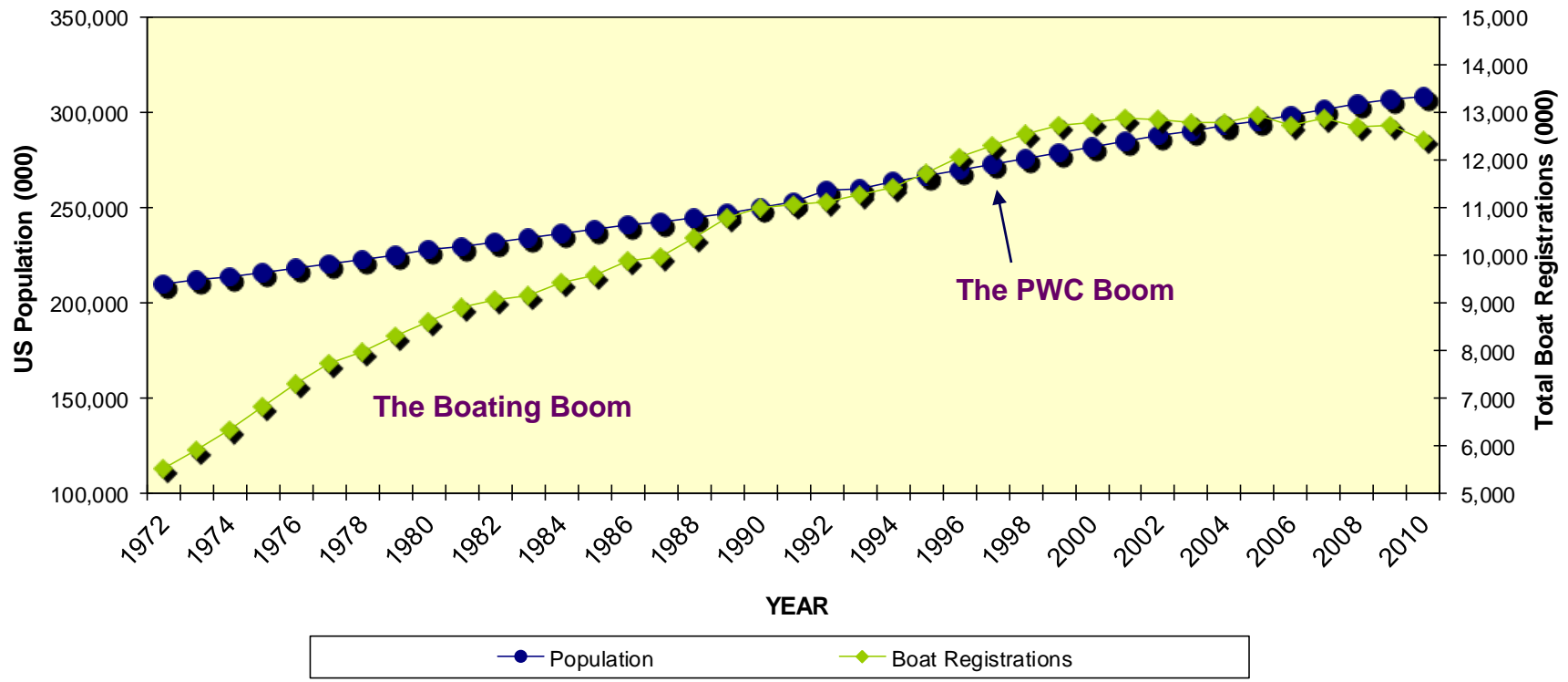
Significant Decline in Demand Bottomed in 2010

Total Recreational Boats In Use



The 1970s and 1980s were very good to boating. And PWCs helped sustain this level of boat ownership through the 1990s.

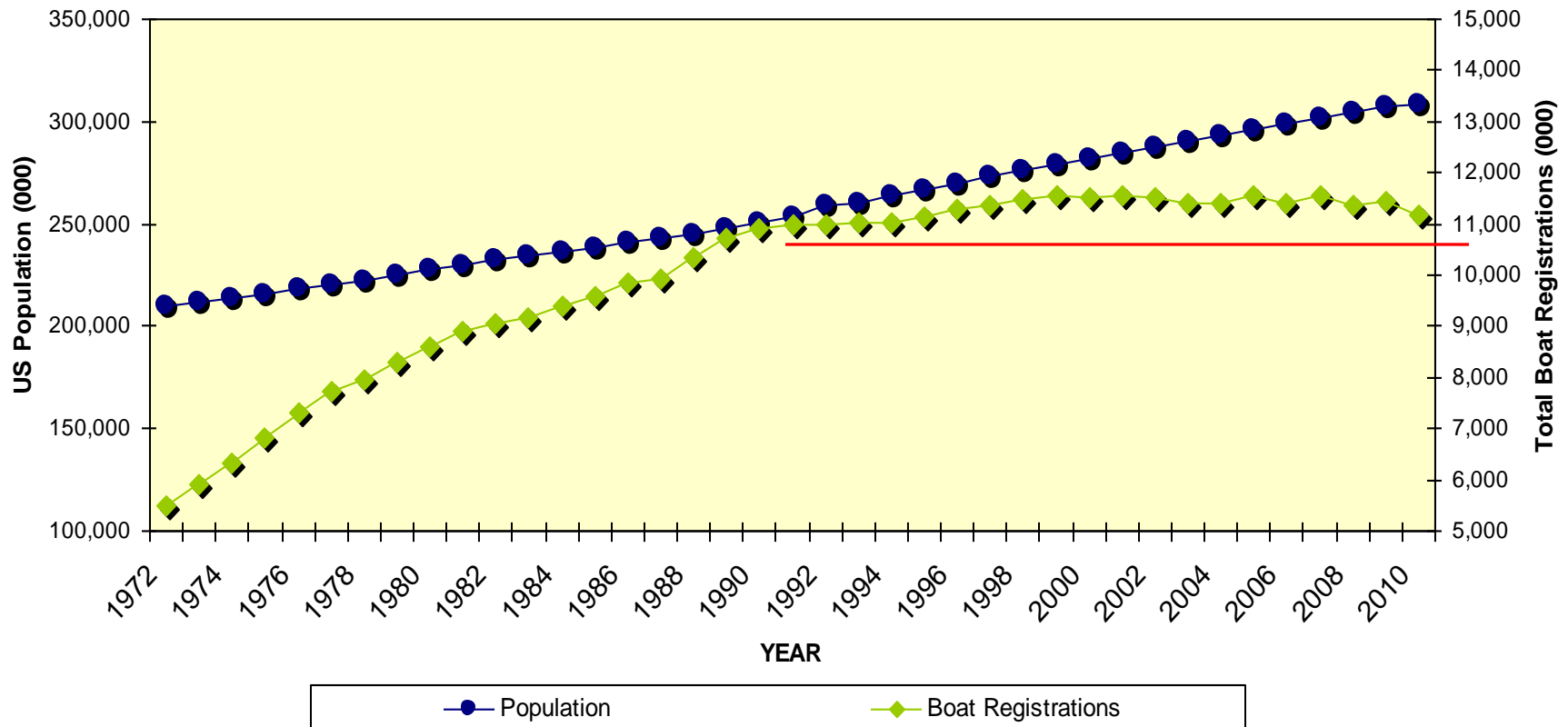
US Boat Registrations vs. Population Including PWCs



Source: Info-Link Technologies Inc.

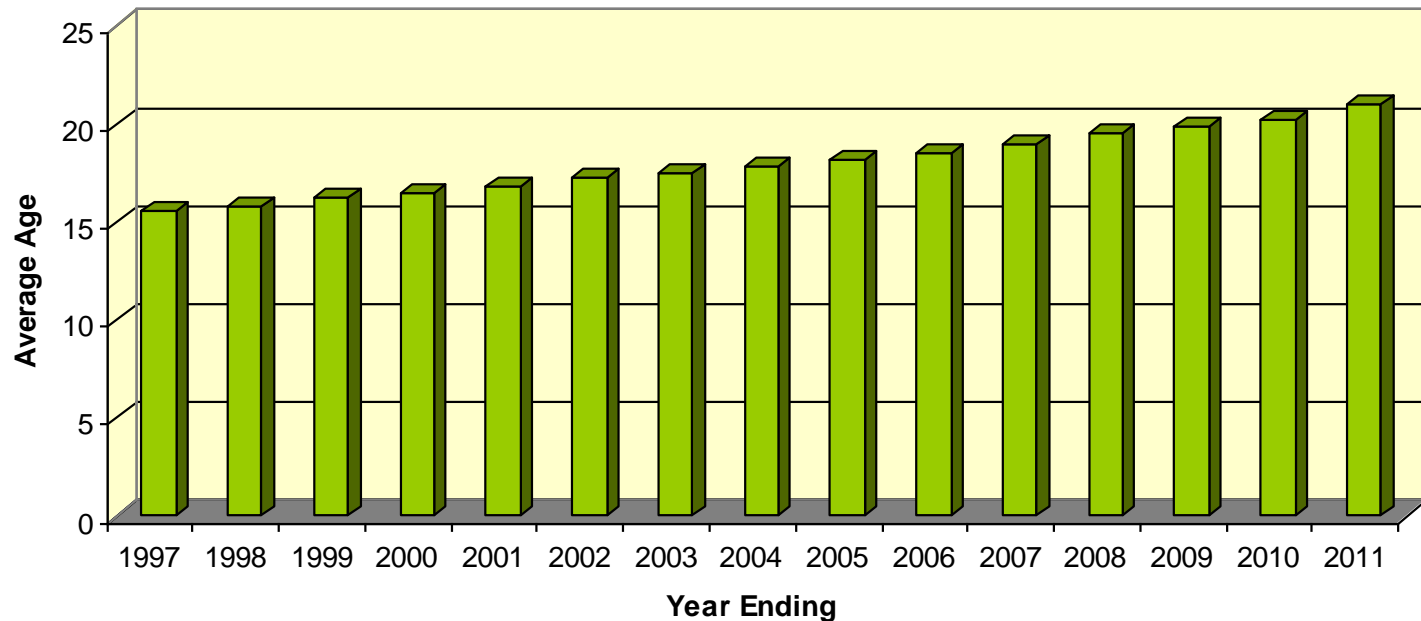
But traditional boat ownership (non-PWC) has not kept up with the population. It has been relatively flat for the past 20 years.

US Boat Registrations vs. Population Excluding PWCs



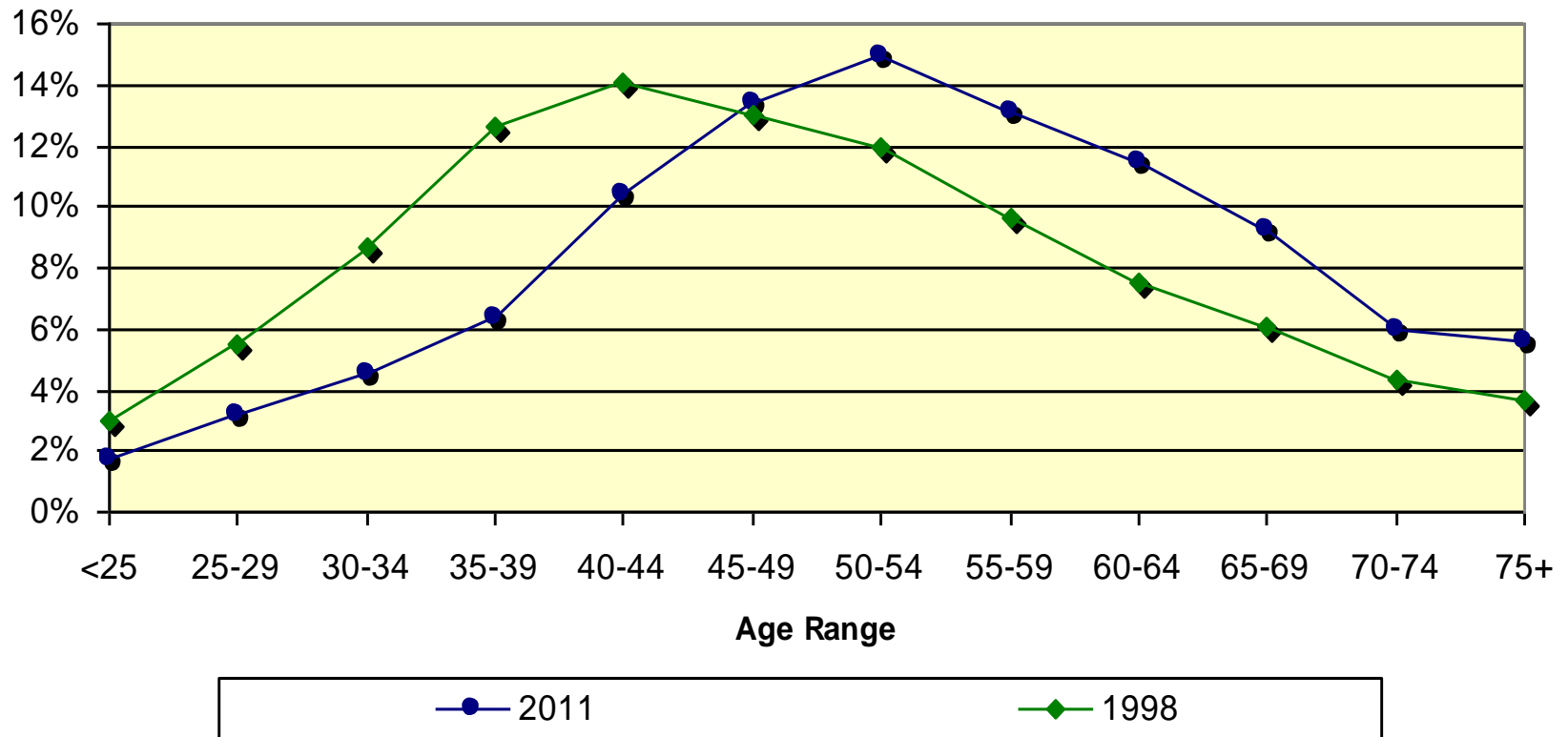
Boats have gotten older. Many of the boats built during the boom are still in use. In 1997 the average boat was 15 years old. Today the average boat is more than 20 years old, and getting older.

Average Boat Age by Year



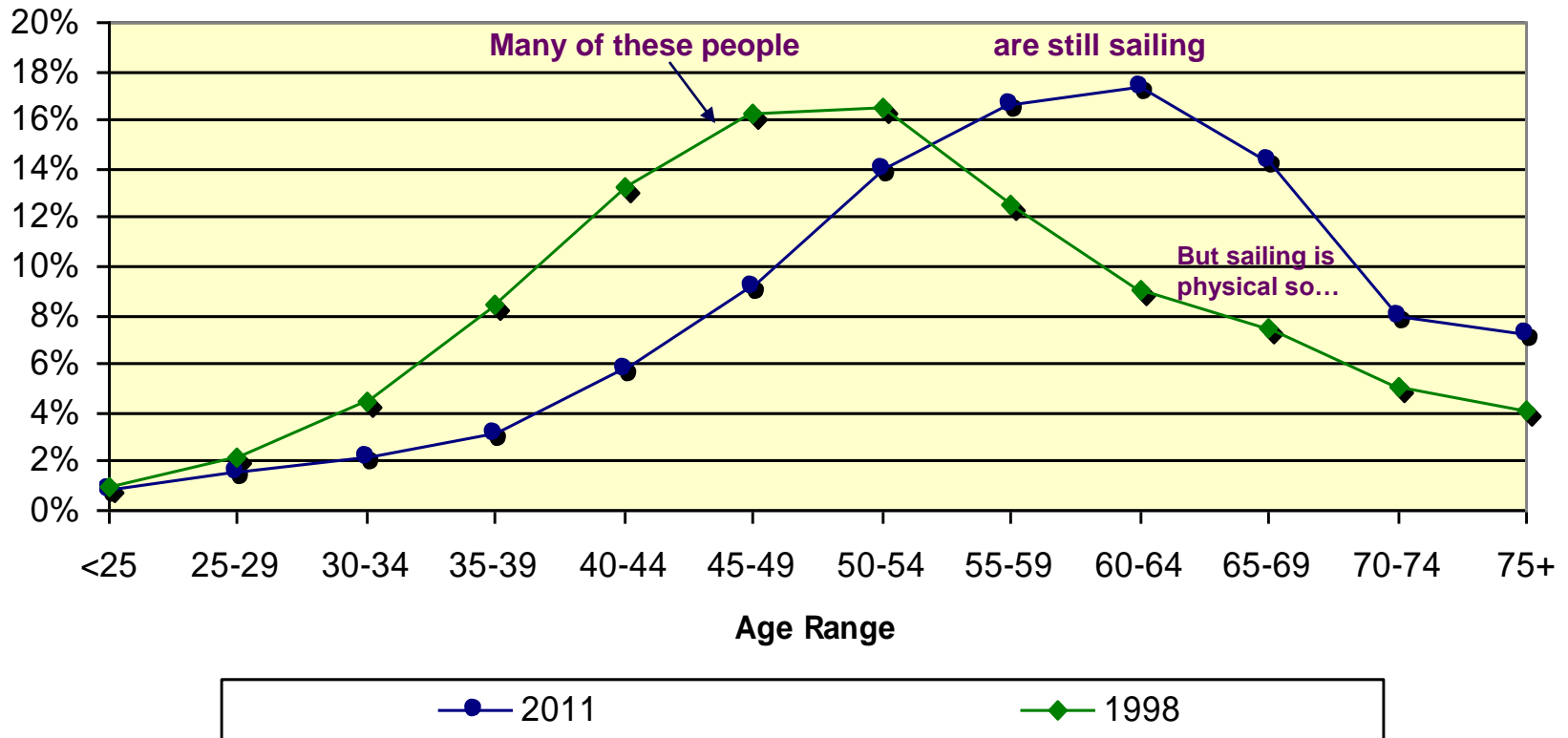
Meanwhile, boat owners have gotten older. Today there are fewer owners in their 30s and more in their 50s and 60s.

Age Distribution of Powerboat Owners
1998 vs 2011

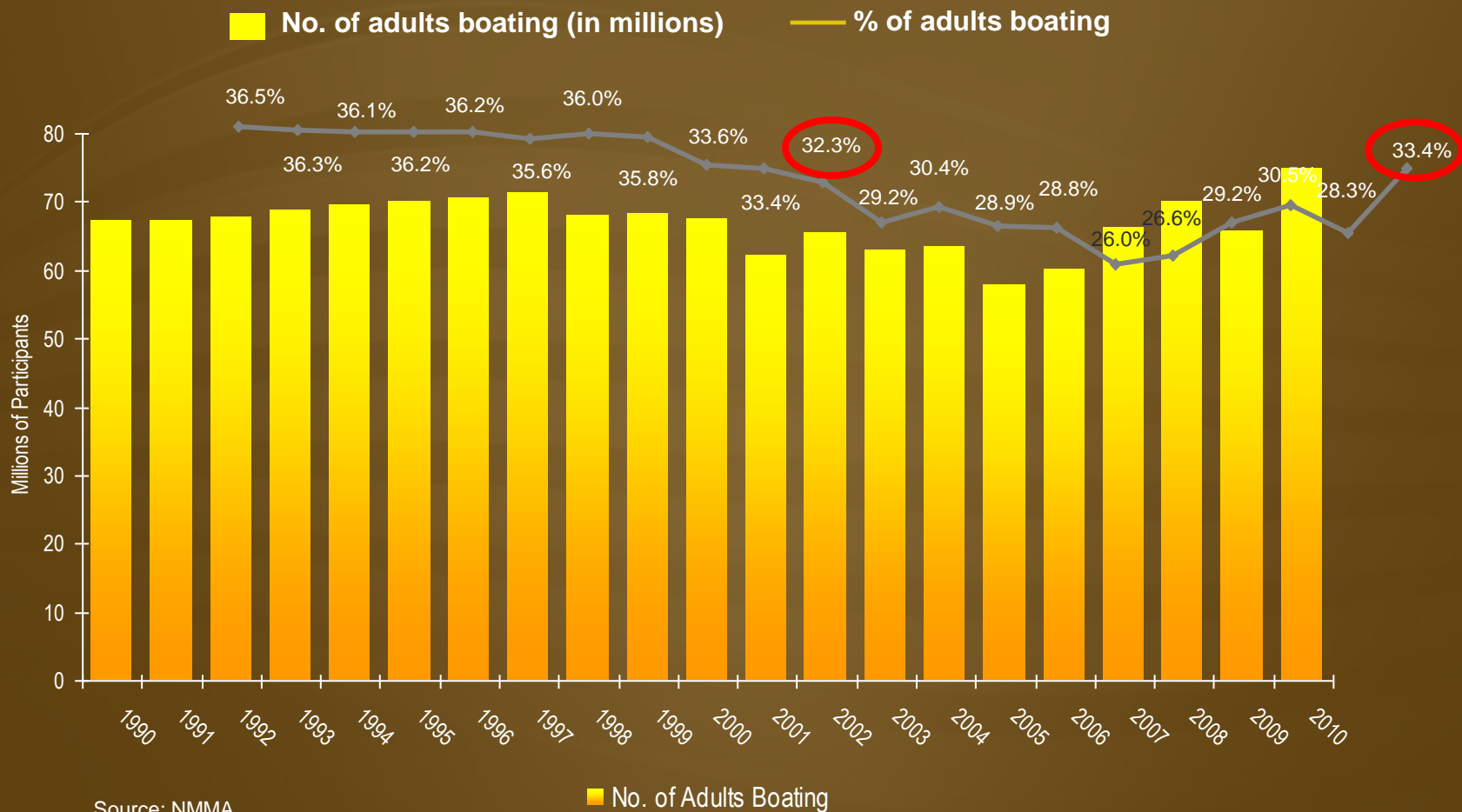


This is especially evident among sailors. They tend to be loyal to the sport but grinding winches in your 70s gets old too.

Age Distribution of Sailboat Owners 1998 vs 2011

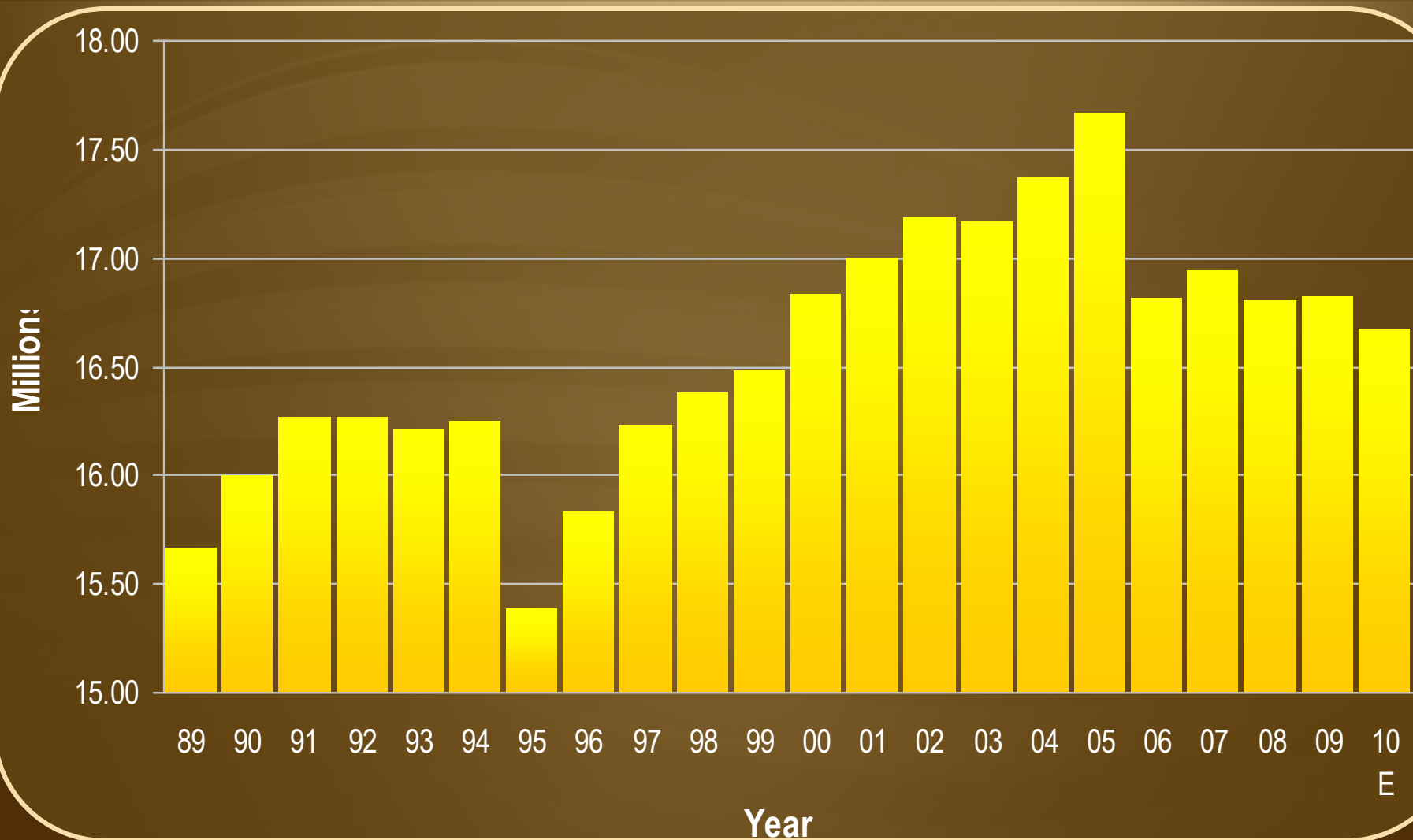


U.S. Boating Participation History (1990 – 2010)

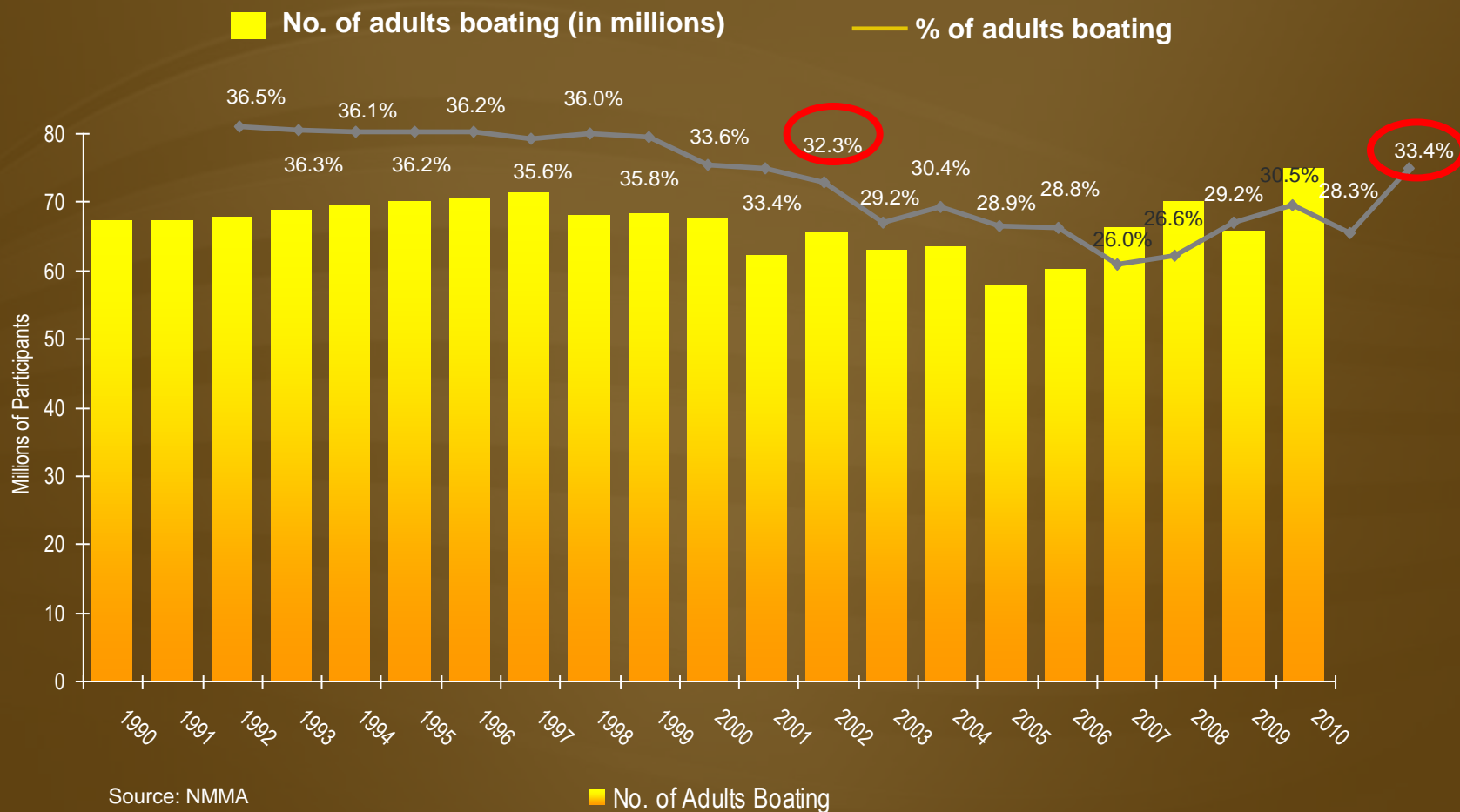


2010 reflects highest level of participation since 2000

Total Recreational Boats In Use



U.S. Boating Participation History (1990 – 2010)

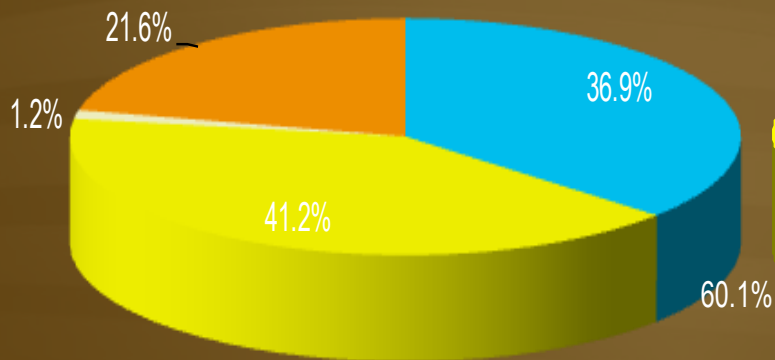


2010 reflects highest level of participation since 2000

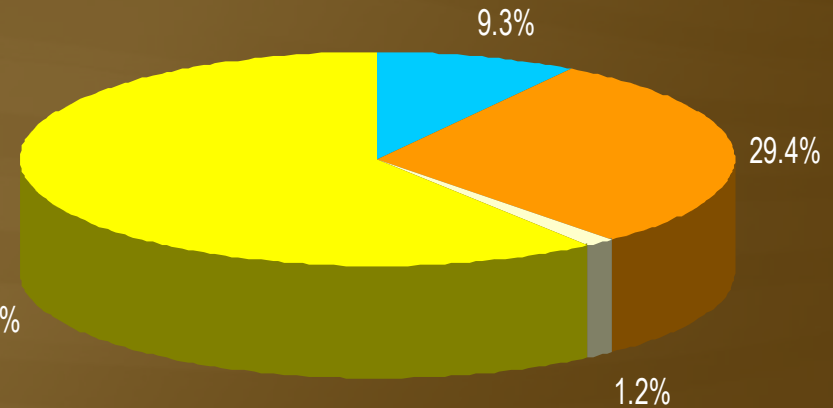
Boating Participation – Exposure to Boating as a Child Drives Adult Participation

Childhood Boating Experience

Current Participant



Non - Participant

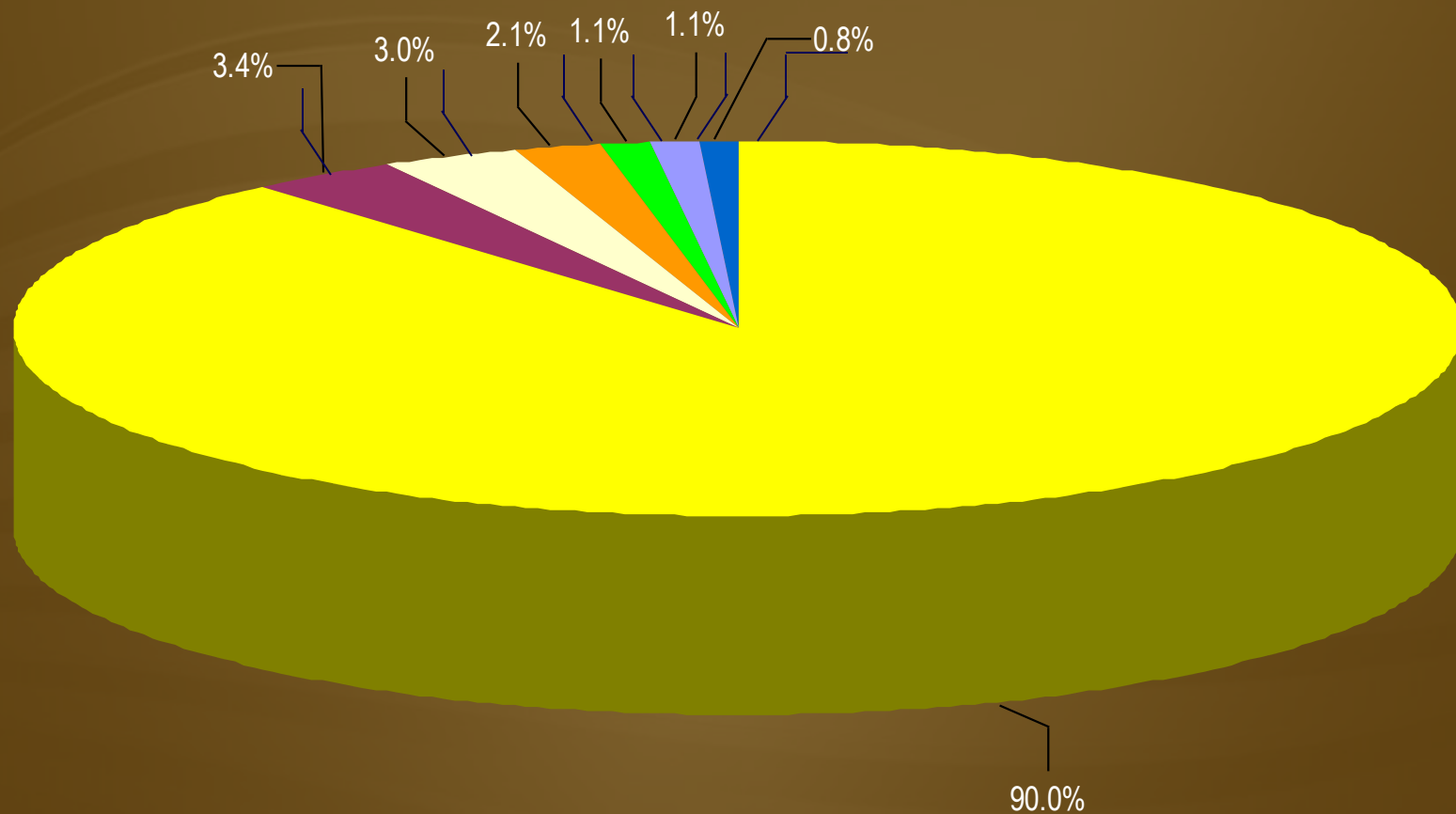


- Boated as child and parents owned a boat
- Boated as child and parents did not own a boat
- Did not boat as a child and parents owned a boat

- Boated as a child and parents owned a boat
- Boated as a child and parents did not own a boat

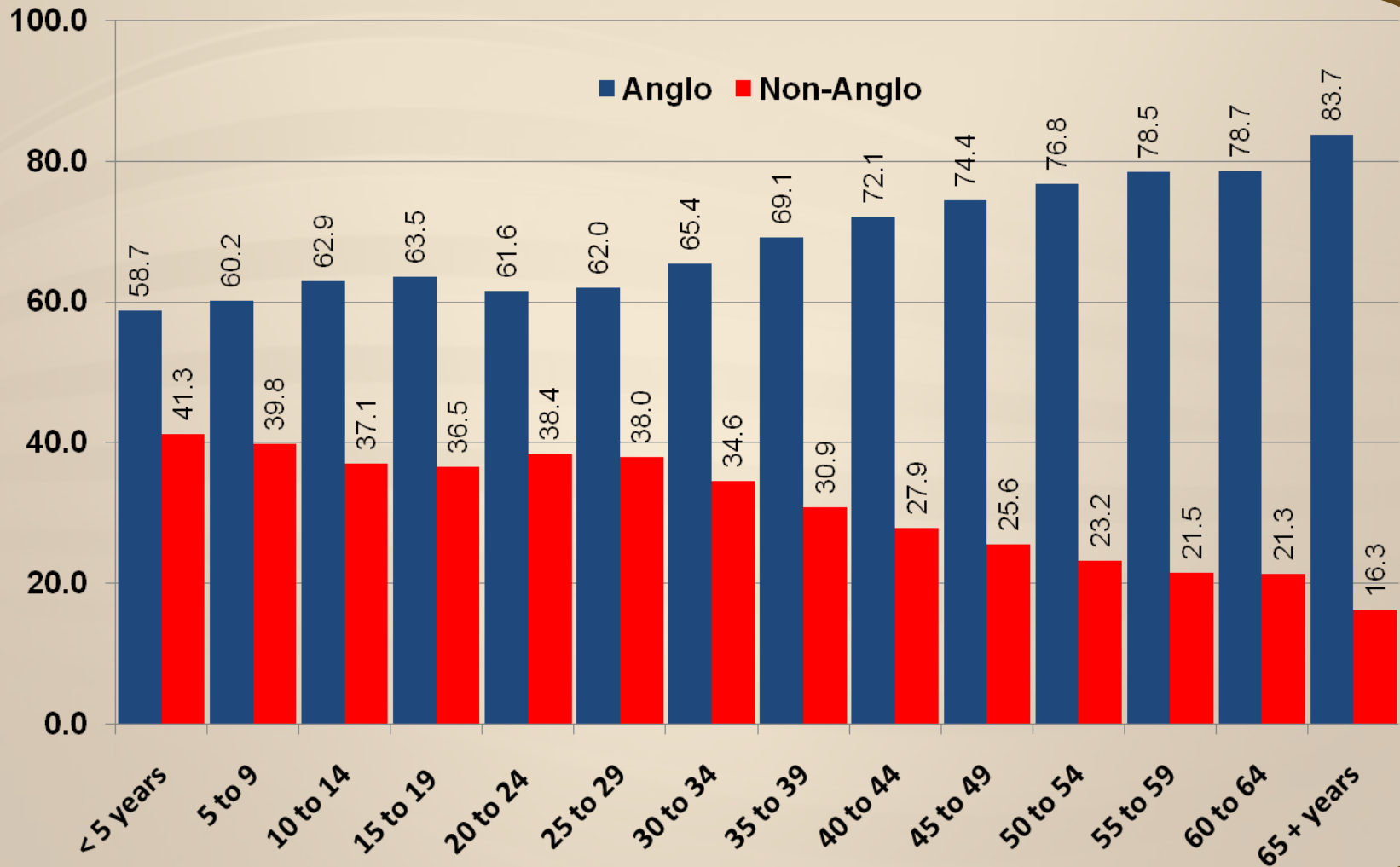
Boat Owner Demographics by Ethnicity

2010 Any Powerboat

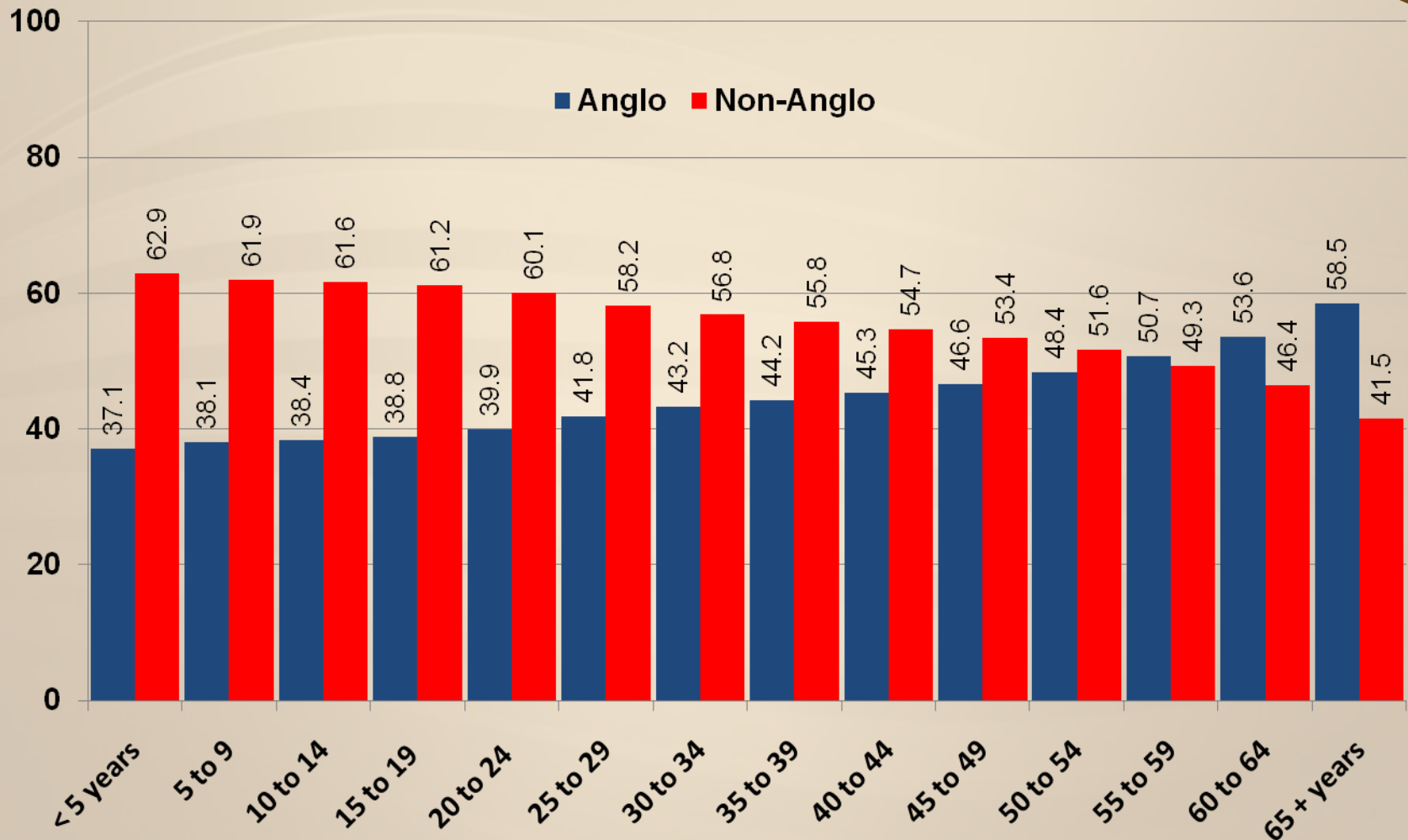


- White
- Black
- Asian or Pacific Islander
- Native American/Alaskan Native
- Mixed Racial Background
- Other Race
- Declined to Answer

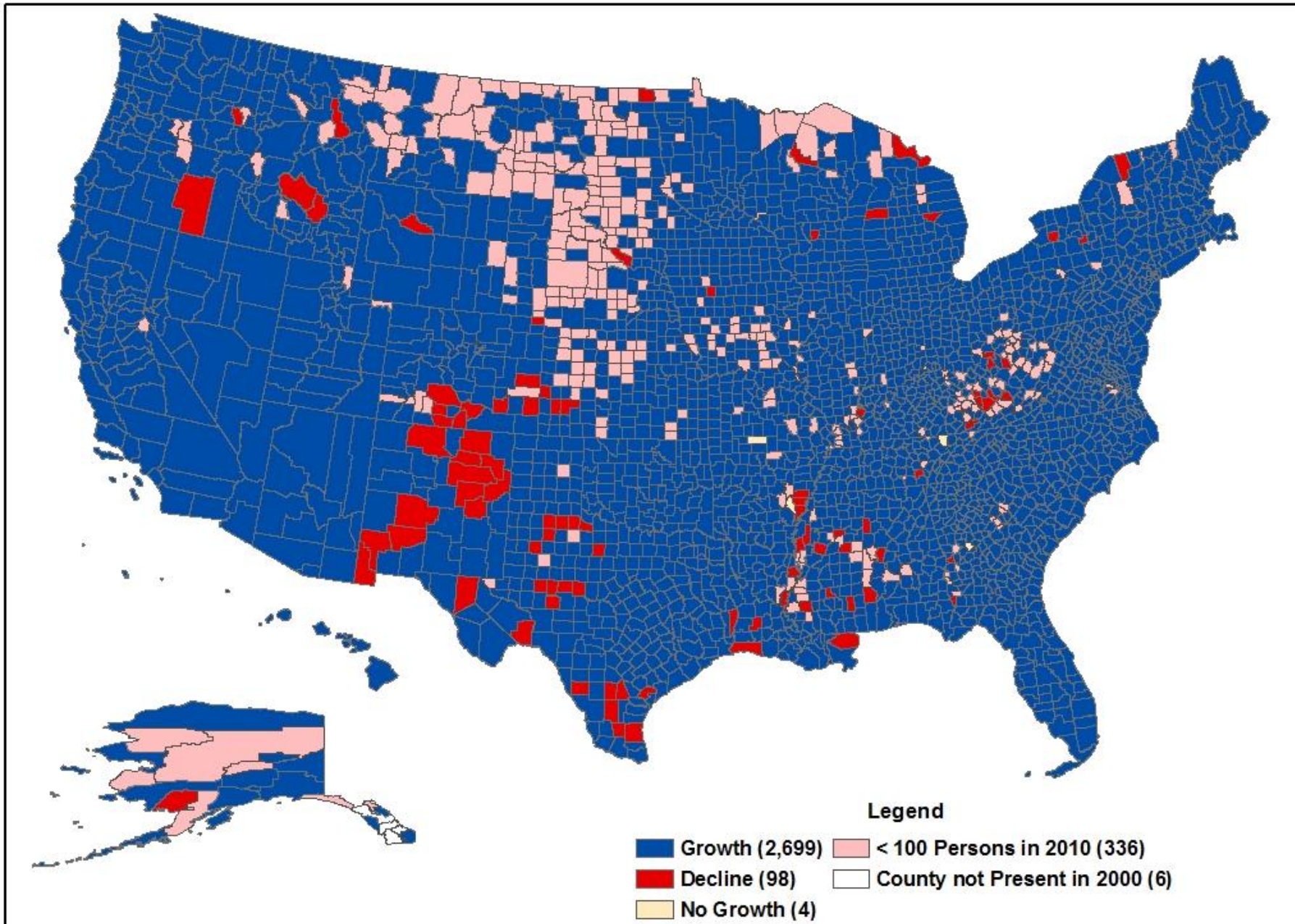
Percent of United States Population by Age Group and Ethnicity, 2000



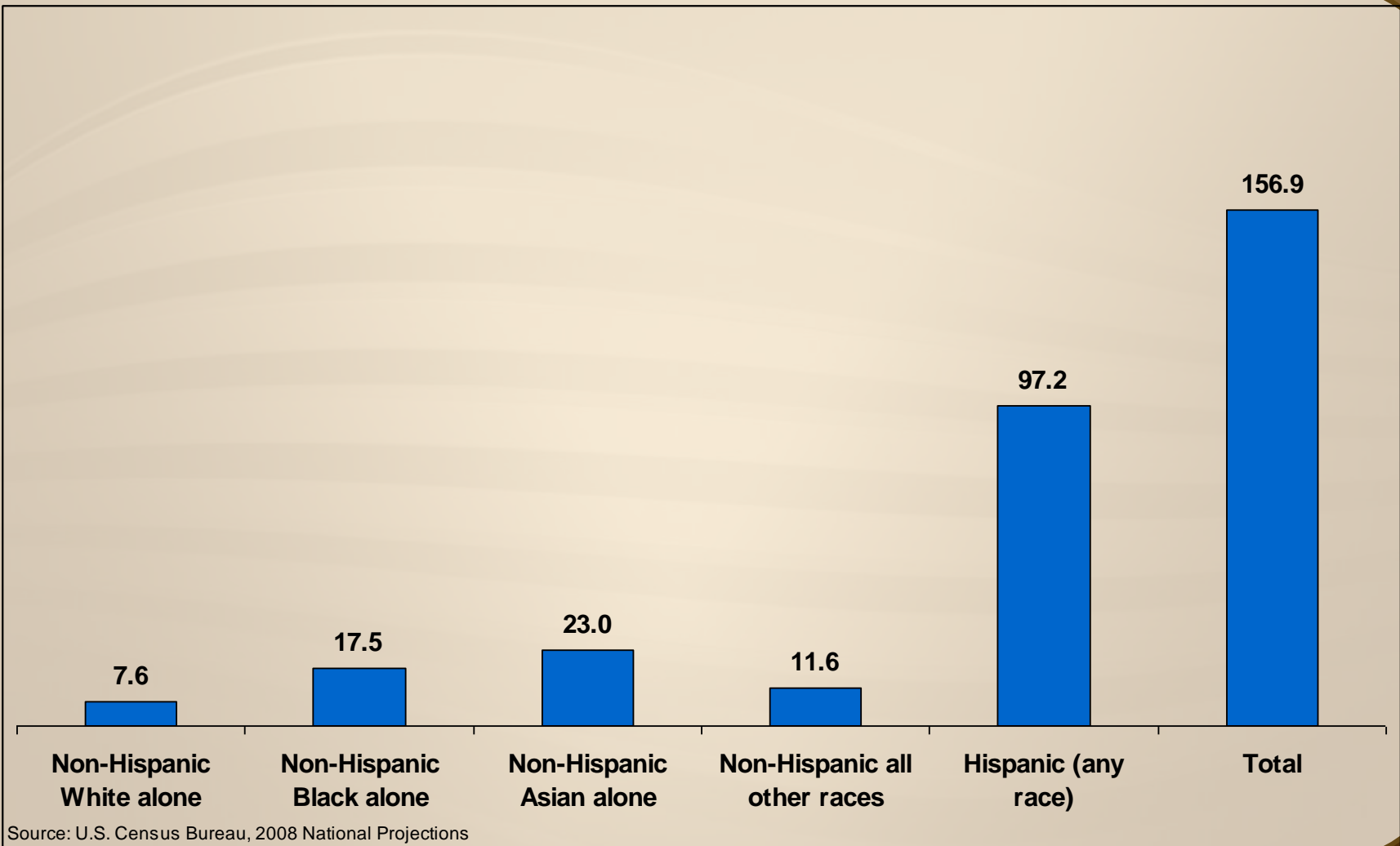
Percent of United States Population by Age Group and Ethnicity, 2050



Counties Classified by Population Change in the Hispanic Population, 2000-2010



Numeric Change in the Projected U.S. Population by Race and Hispanic Origin: 2000 to 2050 (in millions)

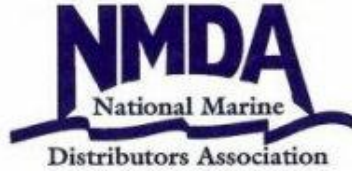


Creating a Robust Future for Recreational Boating

**Developing a shared industry
ten year growth action agenda
based on a shared vision of
success in 2021**



BOY SCOUTS OF AMERICA



National Marine Manufacturers Association



MASSACHUSETTS MARINE TRADES ASSOCIATION



National Marine Electronics Association



Visions for 2021

- 1. Unified Industry Cross Sector Collaboration Brings Results—Boating Now Preferred Recreation Choice**
- 2. Boating participation soars! New Generation and Greater Diversity attracted to boating**
- 3. Expanded Access to the Water and the Lifestyle Has Been Achieved**
- 4. Smarter and Fewer Regulations, and Better Boating Education Results in Safe, Affordable and Enjoyable Boating**

Joint Actions to be Considered

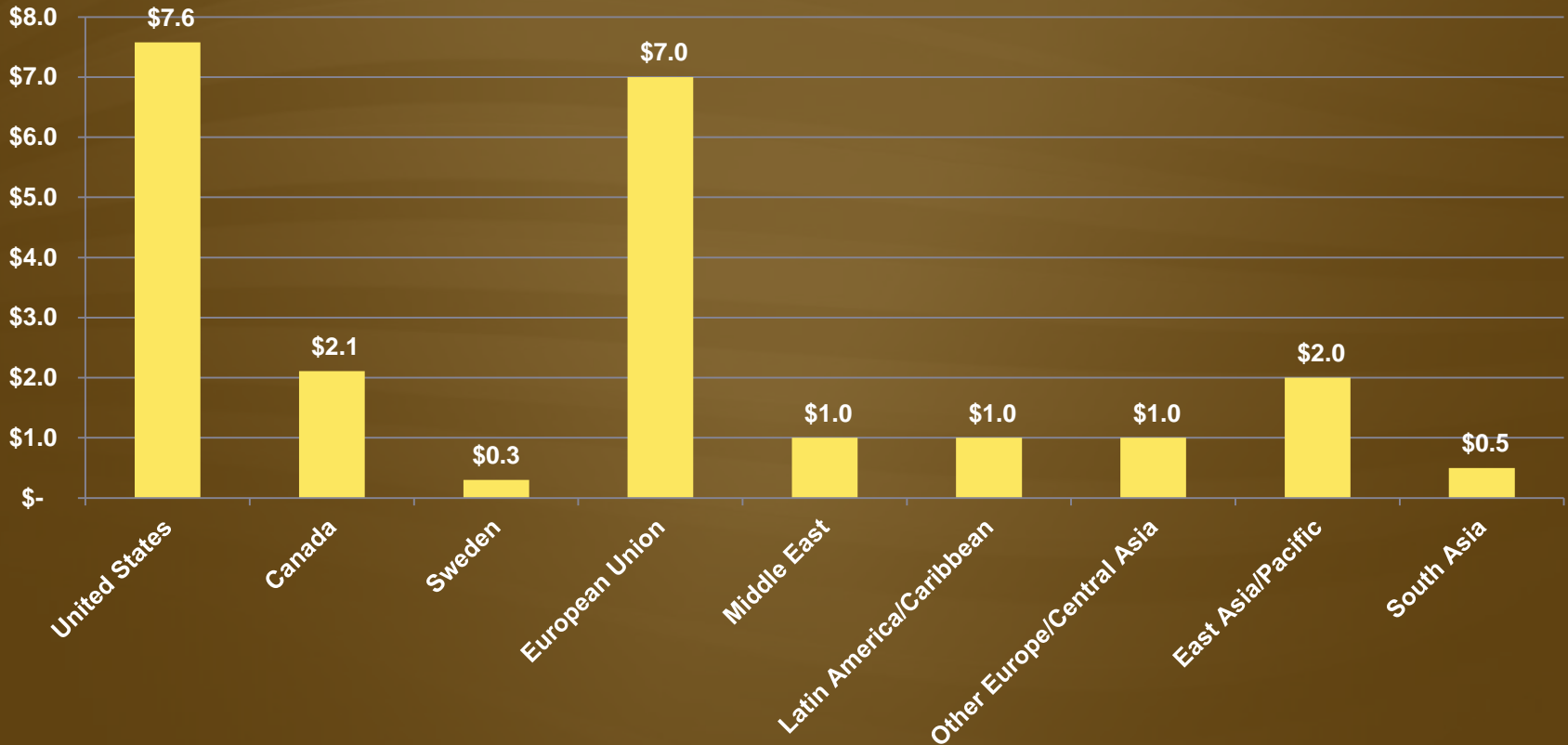
- Encourage boaters to invite friends on the water
- Each stakeholder group commits to deliver collaborative efforts to their stakeholders
- Encourage universal support of Discover Boating's Welcome to the Water Campaign
- Focus recreational boating recruitment more on kids and minorities
- Improve efforts on providing better boater education
- Form and strengthen industry partnerships
- Encourage greater diversity within the industry
- Expand American Boating Congress to all stakeholders

So...What's Happening Today

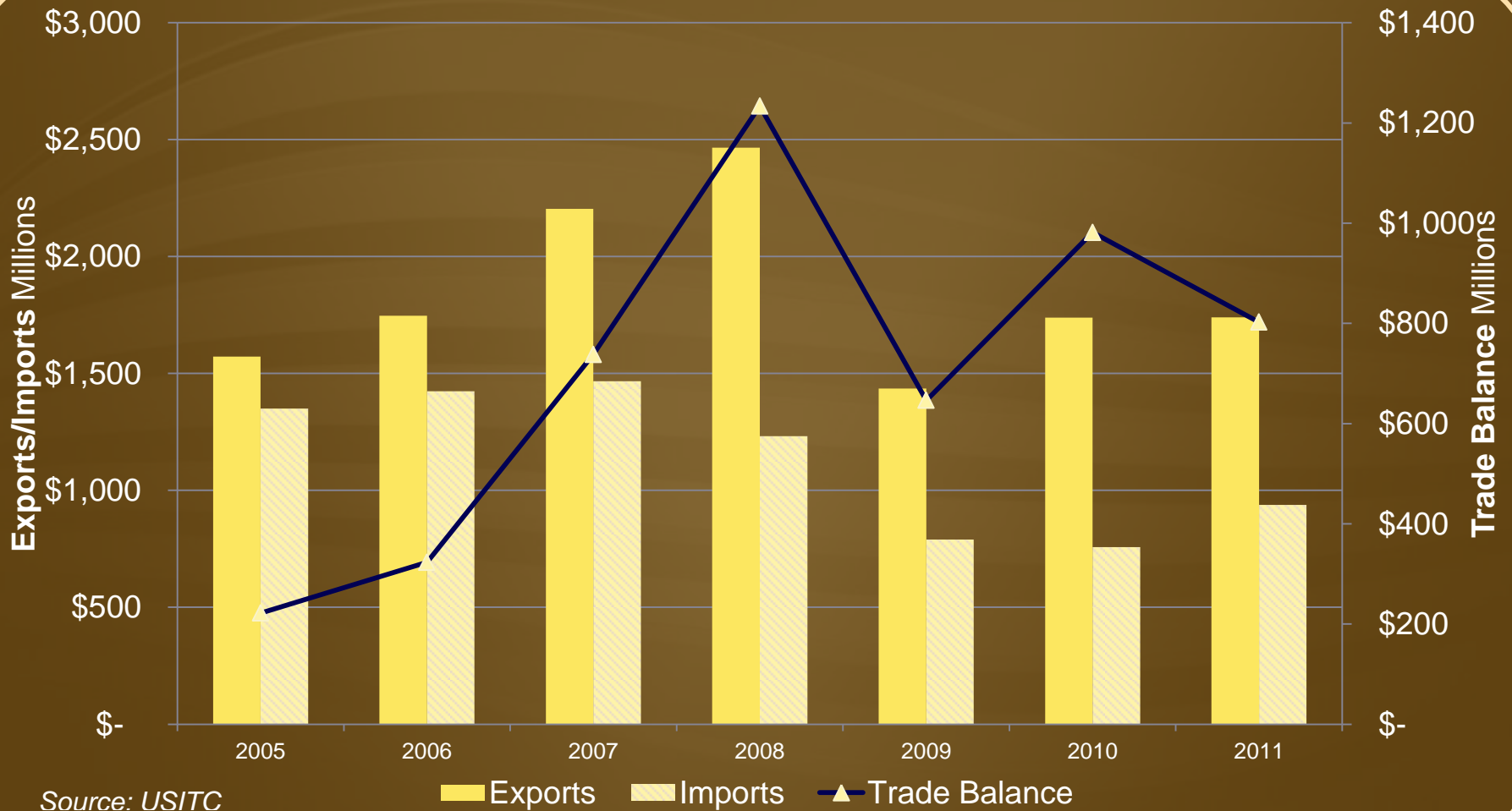
**Boating remains big business
\$30+ billion**

Estimated New Boat and Engine Sales by Key Global Markets

Estimated New Boat/Engine Sales
in U.S. \$ (Billions)

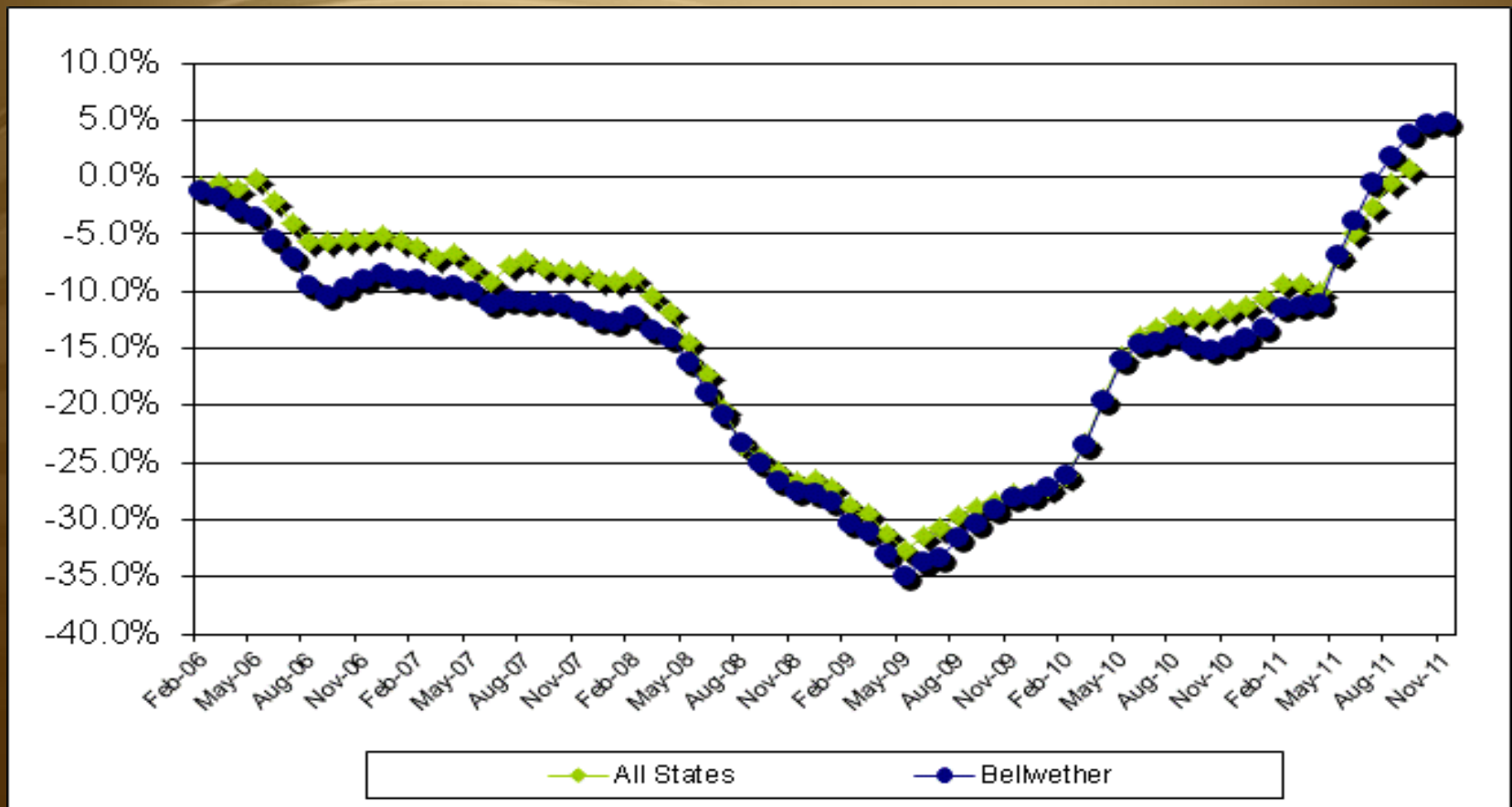


U.S. Recreational Boat Trade



Source: USITC

Info-Link's Bellwether: Retail Sales are Growing for the First Time in 5 Years

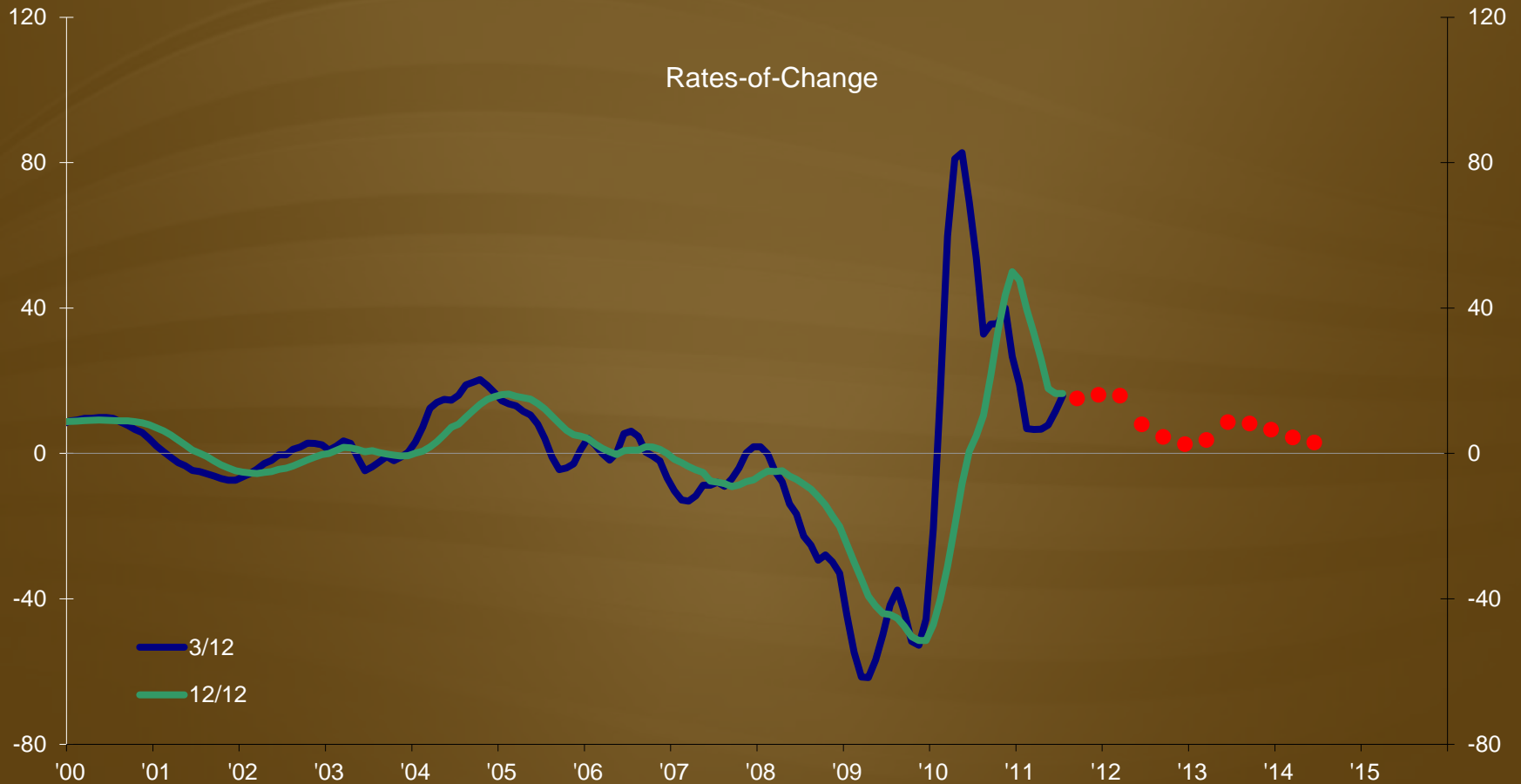


Source: Info-Link Technologies Inc.

So...What's Happening

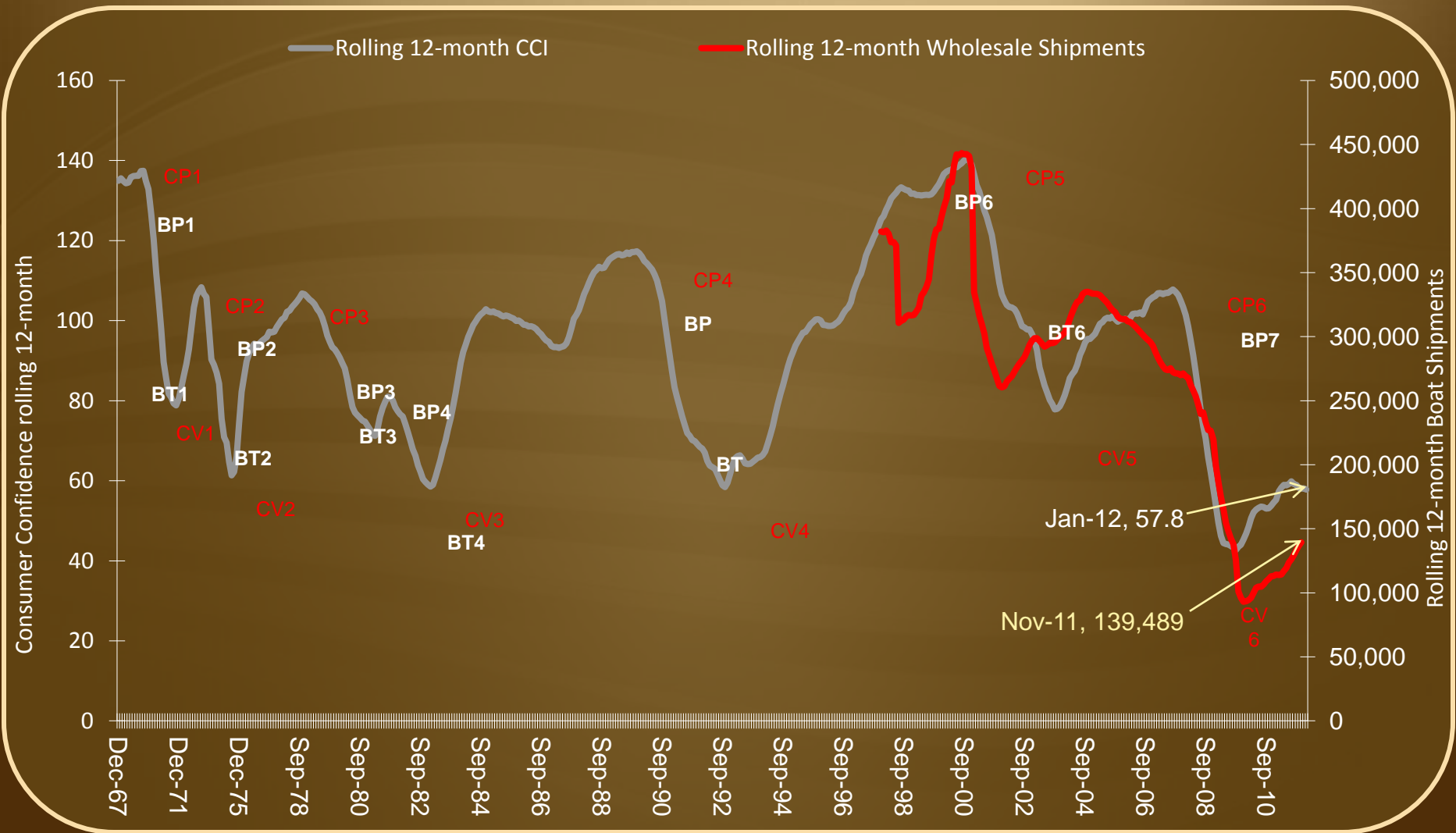
- **Boating remains big business - \$30 billion**
- **North America remains 44% of Global Market and a Net Exporting Industry**
- **Retail Sales are Growing for First Time in 5 Years**
- **Wholesale Shipments of New Boats Up 23% in Units and 33% in Dollars in 2011**

ITR Economics' Forecast of Shipments: Continuing Growth through 2015



Source: ITR Economics

Comparison of Consumer Confidence to Wholesale Boat Shipments as of February 14, 2012



Consumer Spending Back On Track

Real Personal Consumption Expenditures on Goods and Services



source: Bureau of Economic Analysis

So...What's Happening

- **Boating remains big business - \$30 billion**
- **North America Remains 44% of Global Market and a Net Exporting Industry**
- **Retail Sales are Growing for First Time in 5 Years**
- **Wholesale Shipments of New Boats Expected to be Up 23% in Units and 33% in Dollars in 2011**
- **ITR Economic Forecast of Shipments Shows Continuing Growth through 2015**
- **Consumer Confidence, Light Vehicle Sales and Consumer Spending Improving**
- **2012 Boat Shows Off to a Good Start**

A large splash of blue water surrounds a central white sign with a metallic border. The sign contains the text 'WELCOME To The WATER' in red. Below the sign is a dark grey oval with the 'DiscoverBOATING' logo and text.

WELCOME
To The
WATERSM



*Discover***BOATING**

2012 Objectives.

- **Grow awareness of Discover Boating/Welcome to the Water among our target community.**
- **Increase positive perceptions of the boating lifestyle.**
- **Increase participation in the boating lifestyle.**
- **Increase desire to own a boat.**
- **Deliver qualified leads to manufacturers and dealers.**

WELCOME To The WATER

Discover BOATING

About | Resources | Dealer Certification | NRMA Certification | News | Retrieve Leads

INDUSTRY RESOURCE CENTER

TOOLS FOR YOUR USE

Affordability Tool

KANYAW
KOST ON YOUR SIXA



1 2 3 4 5 6

Discover Boating is an industry-wide effort to promote the boating lifestyle and improve the boating experience to increase participation and ultimately sales of marine products and services.

RETRIEVE LEADS

Login: Password:
Lastname: Username:
Email: Confirm Password:

News:



New Accessory Funding Model Launched
North American marine accessory manufacturers will soon join boat and engine manufacturers in funding the campaign. A voluntary funding model for contributions for accessory manufacturers was unanimously approved. [Press release](#)



2011 Marketing Results Posted
Take a look at the progress the Discover Boating campaign made last year with interactive marketing, advertising and public relations. Stay tuned for details on Discover Boating's 2012 marketing plans in the coming weeks. [Full results video](#)



Looped Welcome to the Water Video Available
Order at no charge! This four-minute looped Welcome to the Water DVD is perfect for showrooms and boat show monitors. Help the boating lifestyle come alive whenever you're selling this winter! [Order here](#)

Welcome to the Water Video:



To access the embedding code, click on the button below the player, then copy the code to add to your site.

STAY ACTIVE WITH DISCOVER BOATING

Discover Boating on Facebook
Like 218,350

Discover Boating
Punxsutawney Phil loves boating too!

Punxsutawney Cruises the River
www.1dnews.com
19 hours ago

Discover Boating
I think boaters have a special

Discover Boating Gal
discoverboating

discoverboating #HappyGroundhogDay! So, Phil says we have six more weeks of winter, but we think this groundhog has the right idea! [ow.ly/8PFXj](#)
2012-02-02 - reply - retweet - favorite

discoverboating Having a winter heat wave? Daydreaming about boating? Start prepping skills for the season with 'The ABC's of Docking' [ow.ly/8MFPzQ](#)
3 days ago - reply - retweet - favorite

WEBINARS
Click on links below to view recorded webinars:

- Social Media Marketing: Twitter Basics
- Social Media Marketing: Building your Facebook Page
- Social Media Marketing: Your Facebook Strategy
- Discover Boating Campaign Launch (U.S. & Canada)

QUESTIONS?
For questions on how to apply any of these tools to your company's website, contact helpdesk@discoverboating.org

Point of Sale



New - Coming Soon
Beginners Guide
To Boating Brochure



Window Clings

**Thank you for your continued support.
Have a great show!**