

Thom Dammrich

**STATE OF THE RECREATIONAL BOATING INDUSTRY
& MIAMI INTERNATIONAL BOAT SHOW UPDATE**

Welcome!



Miami International Boat Show

February 15-19

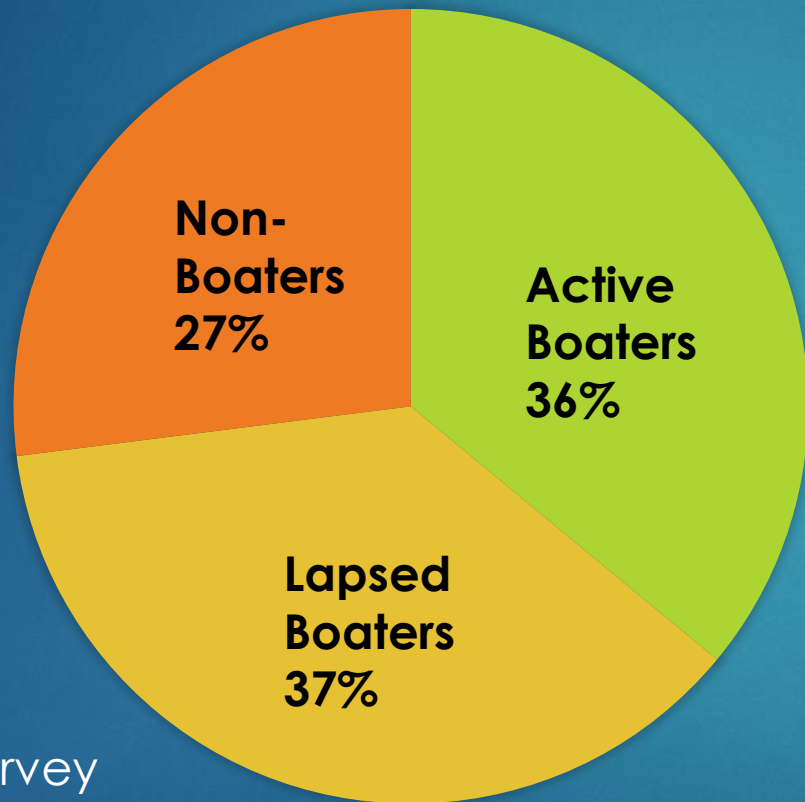


\$854
Million
Economic
Impact

2016 Recreational Boating Participation Study



2016 Boating Participation



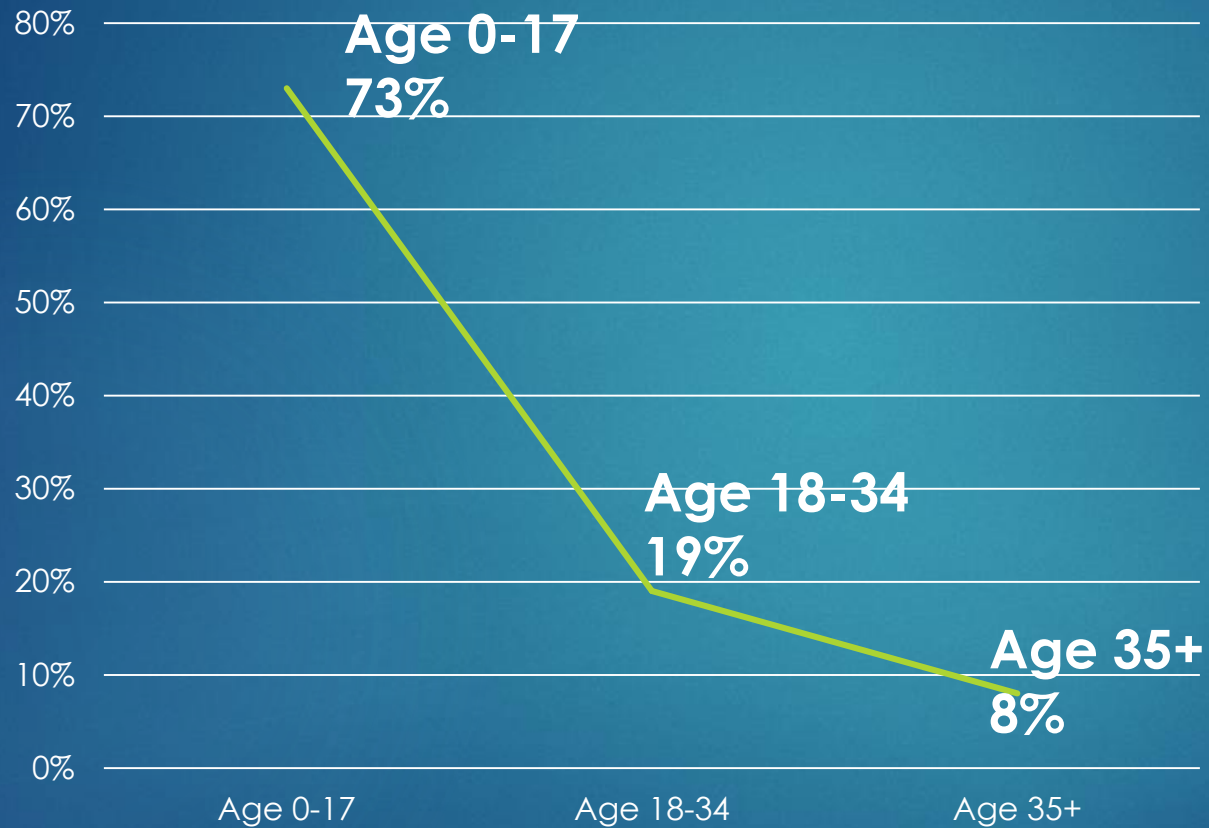
Projected 142 Million Boaters

Projected 17 Million First-Time Boaters



Breakout of survey participants

Early Boating Experience



Early boating experience seems to be conducive to maintaining interest in boating later in life.



Hooked on Boating

83% of
Anglers are
Active
Boaters



Top Legislative Issues



Modern Fish Act



E15



Hurricane Clean-Up



Outdoor Recreation Industry Roundtable



BoatPAC



- ▶ Wednesday, September 20
- ▶ 6 - 8 p.m.
- ▶ Jackson's Bistro
601 S. Harbour Island
- ▶ Wear your favorite team gear and join us to celebrate two American pastimes:
Boating and Football!

Marine Industry Retirement Plan

MARINE INDUSTRY RETIREMENT PLAN

EXCLUSIVELY FOR **NMMA**[®] MEMBERS

LEARN MORE BY VISITING BOOTH #632



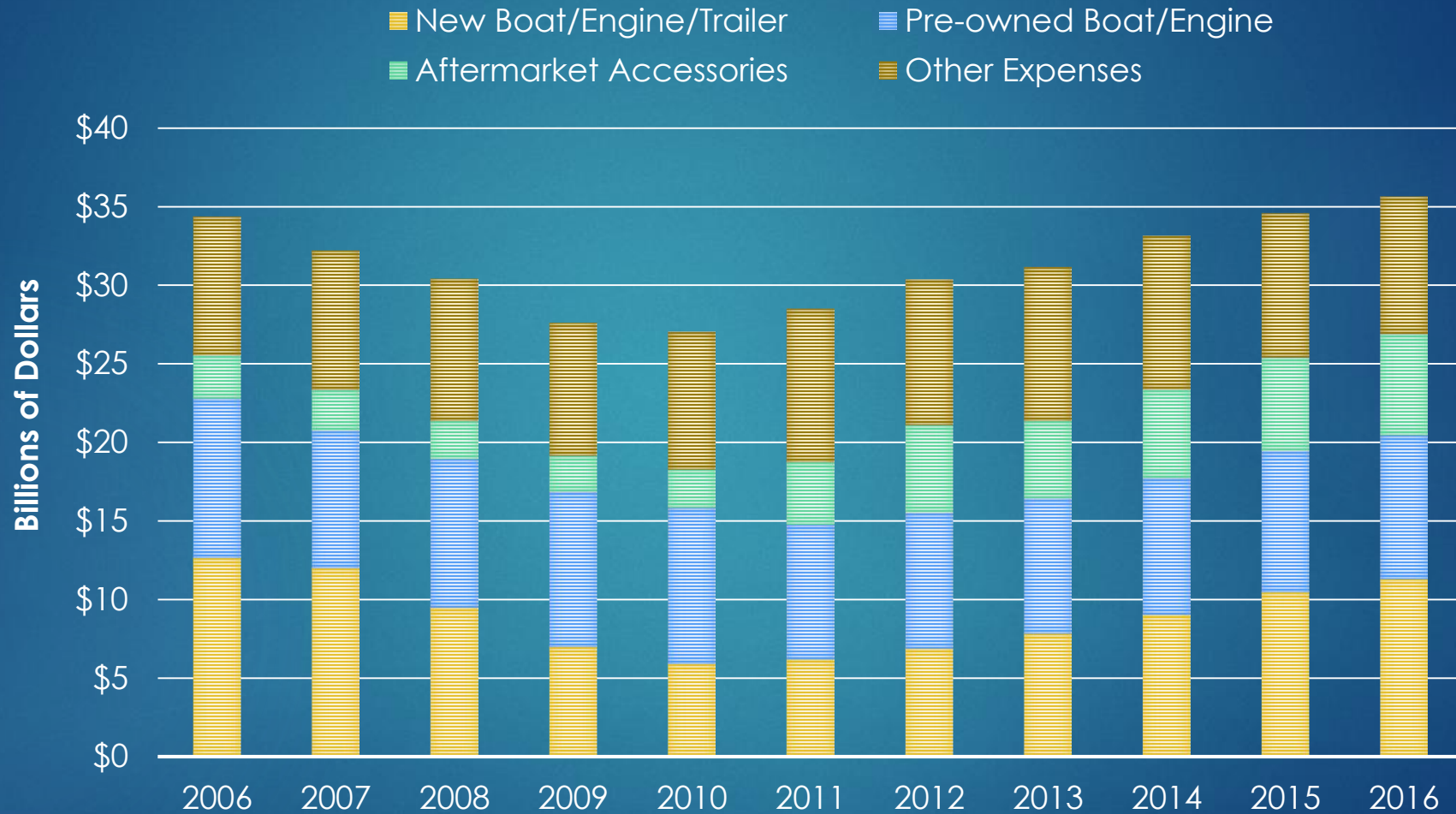
State of the Recreational Boating Industry

THOM DAMMRICH, PRESIDENT

American Retail Spending on Boating

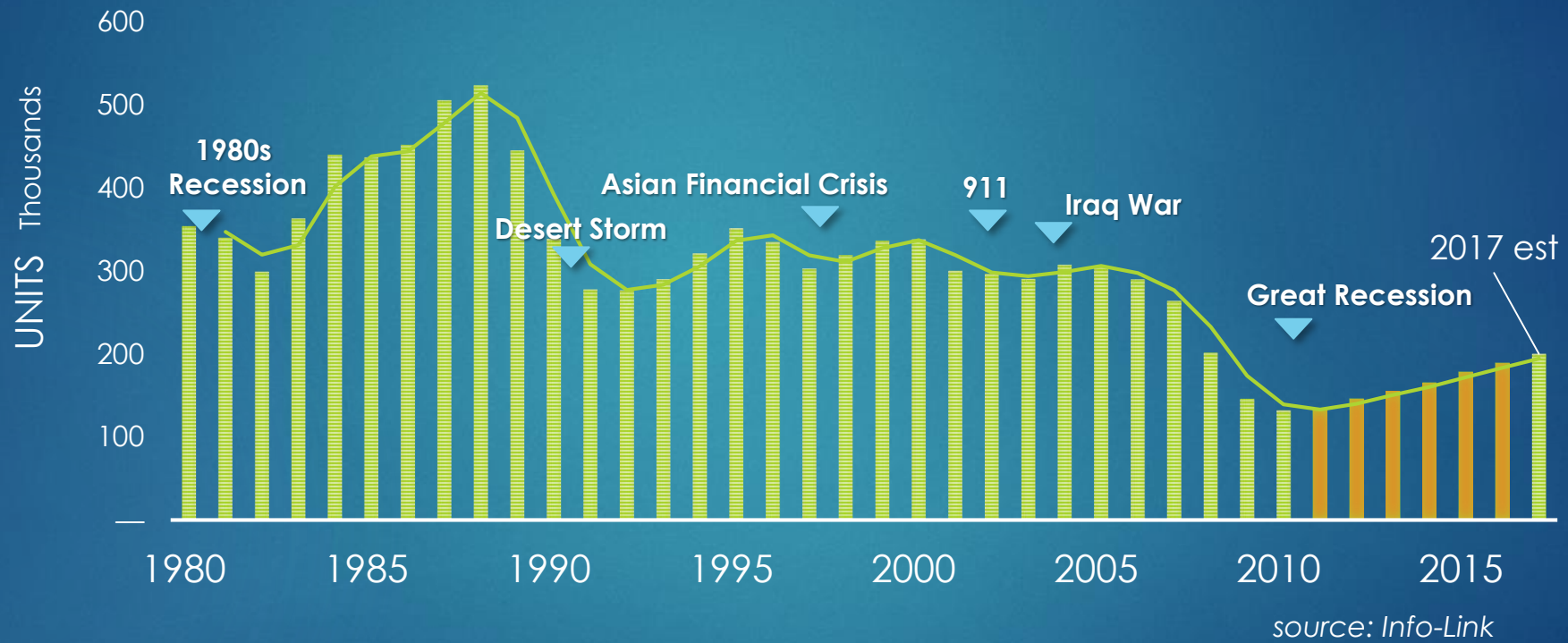


Retail Expenditure Estimates

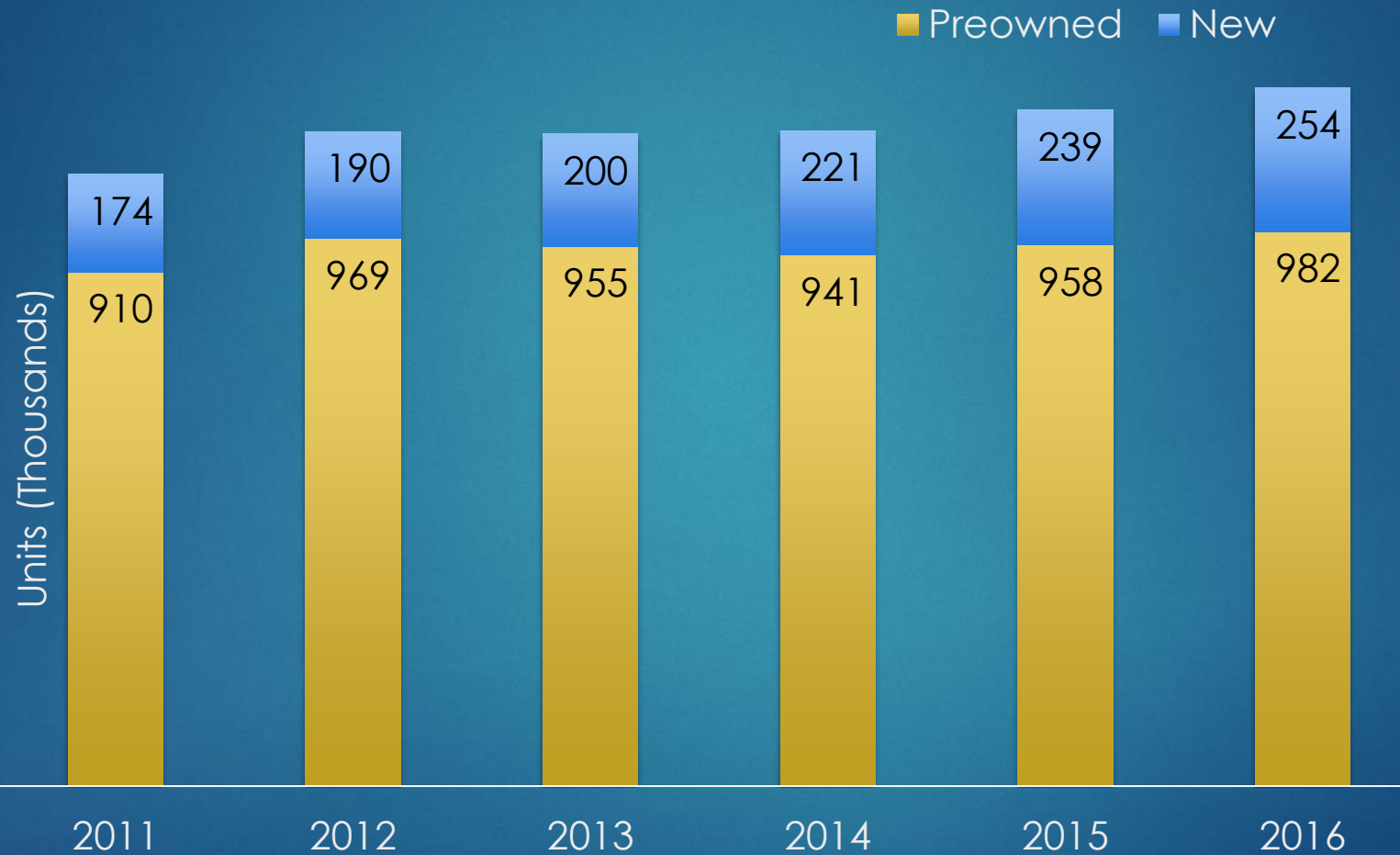


Source: NMMA, ILT, BC

Traditional Powerboat Retail Sales

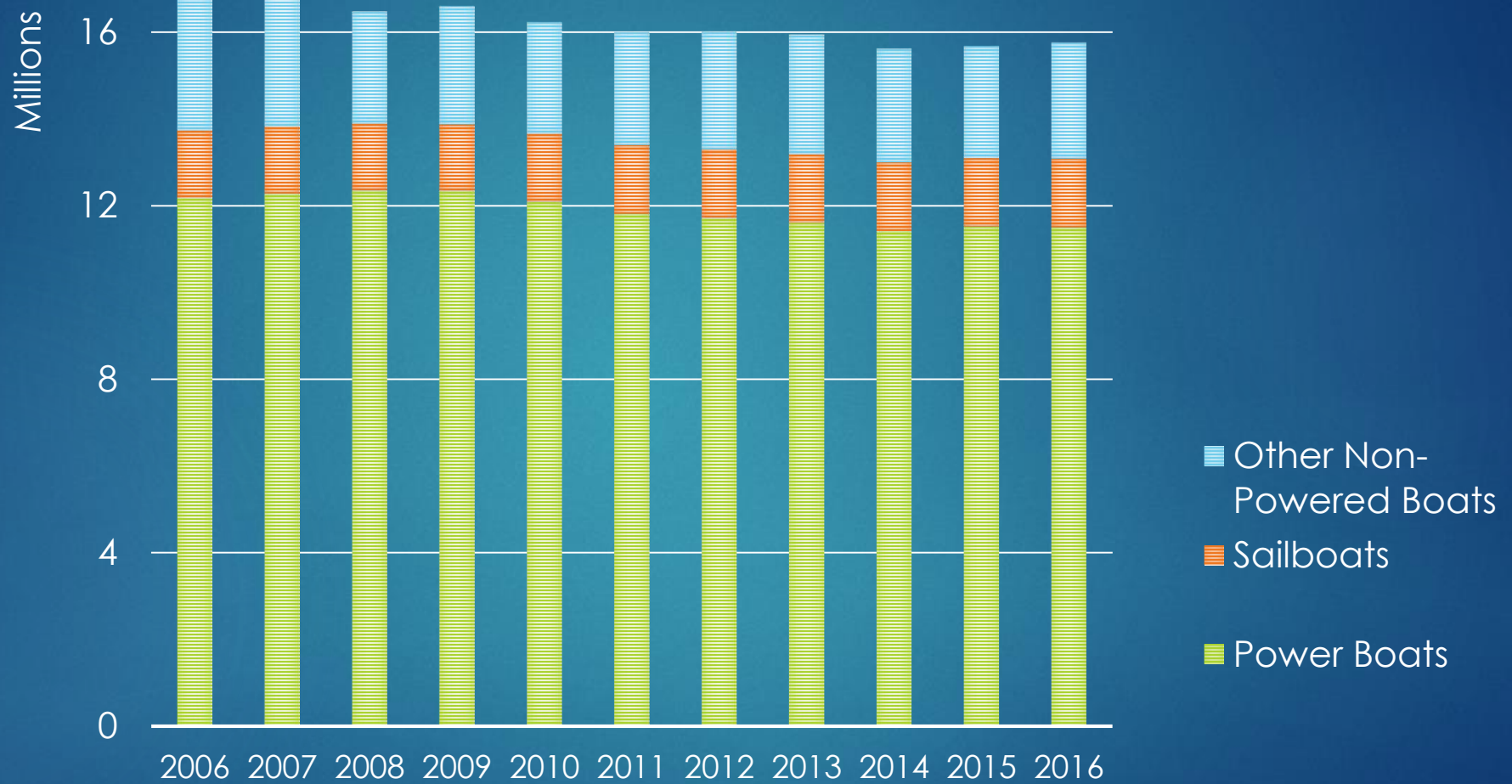


Powerboat, PWC, and Sailboat Sales, New vs. Pre-owned



source: Info-Link, Sail America

Boats In Use



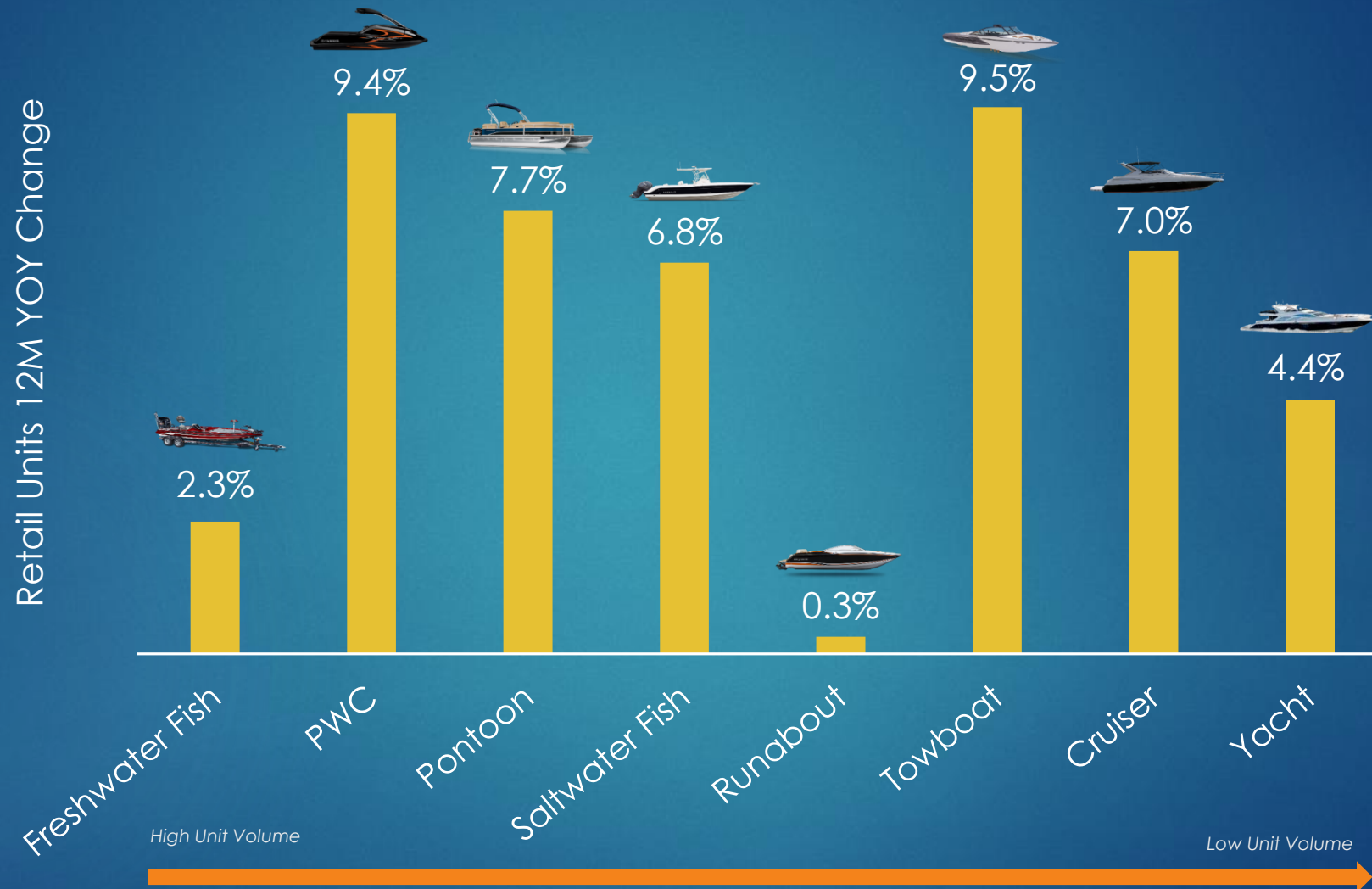
source: NMMA

New Powerboat Retail Unit Sales



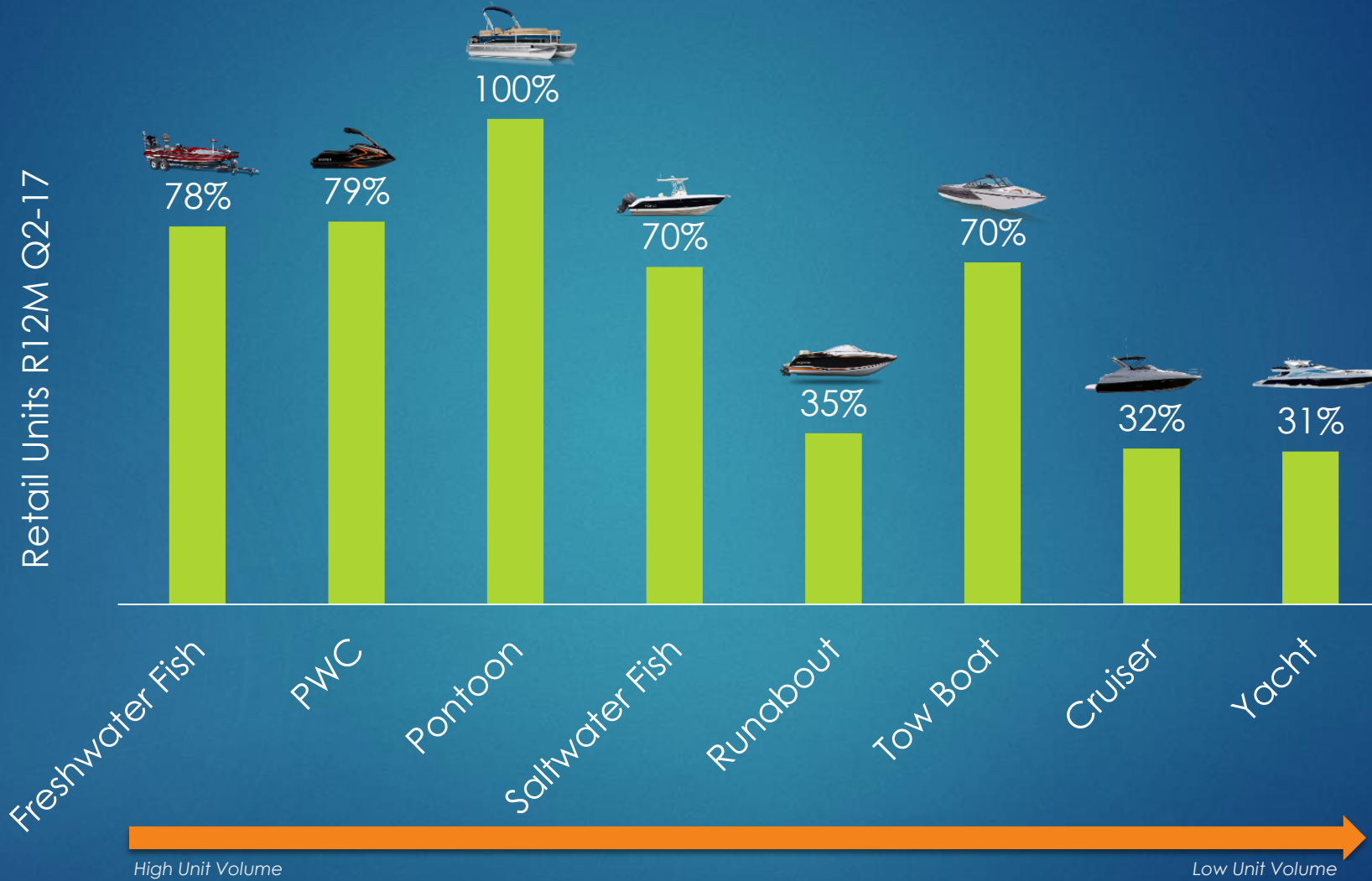
source: Info-Link

Growth Through July 2017

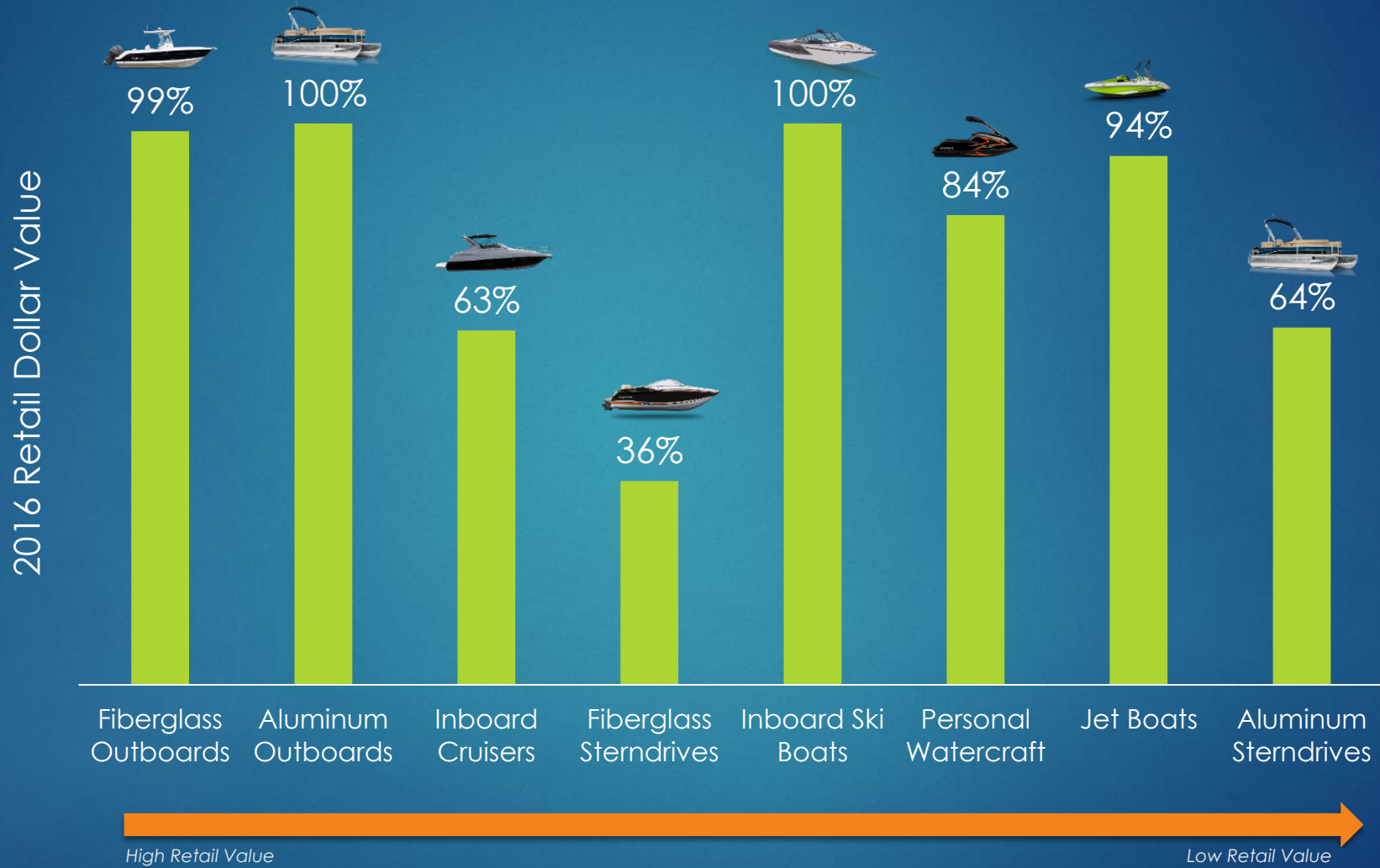


source: Info-link

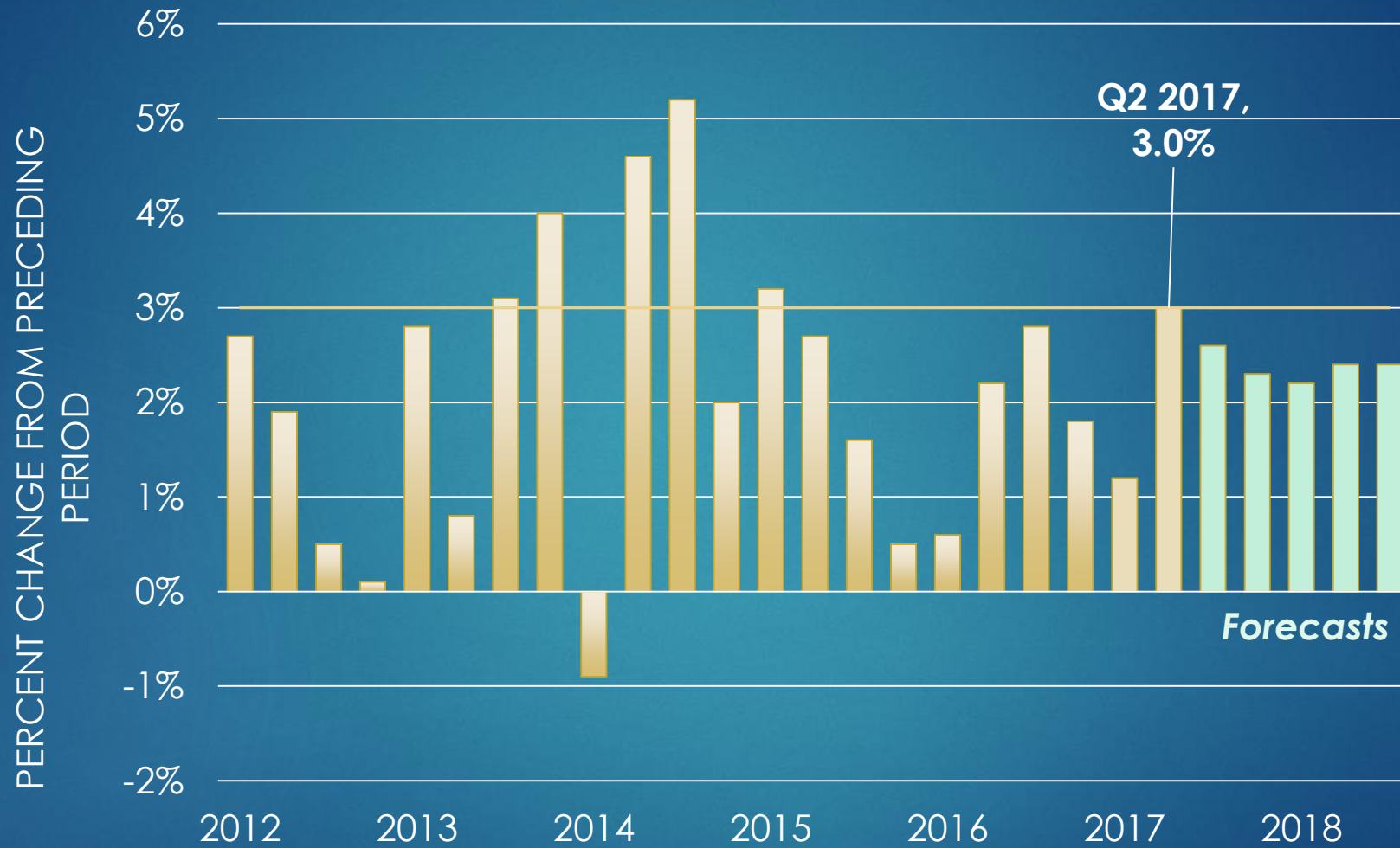
Percent of Peak



Percent of Peak

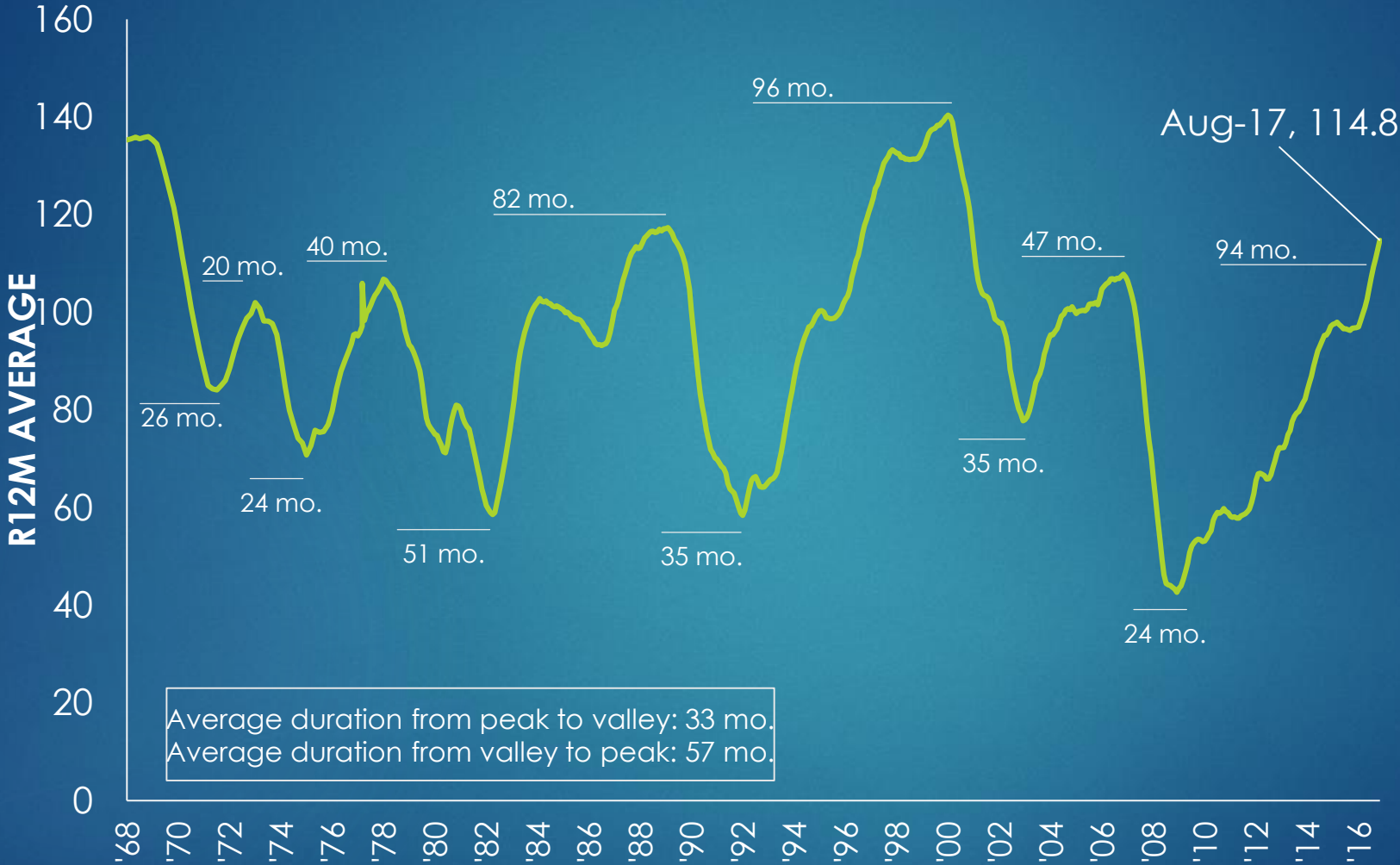


Real GDP



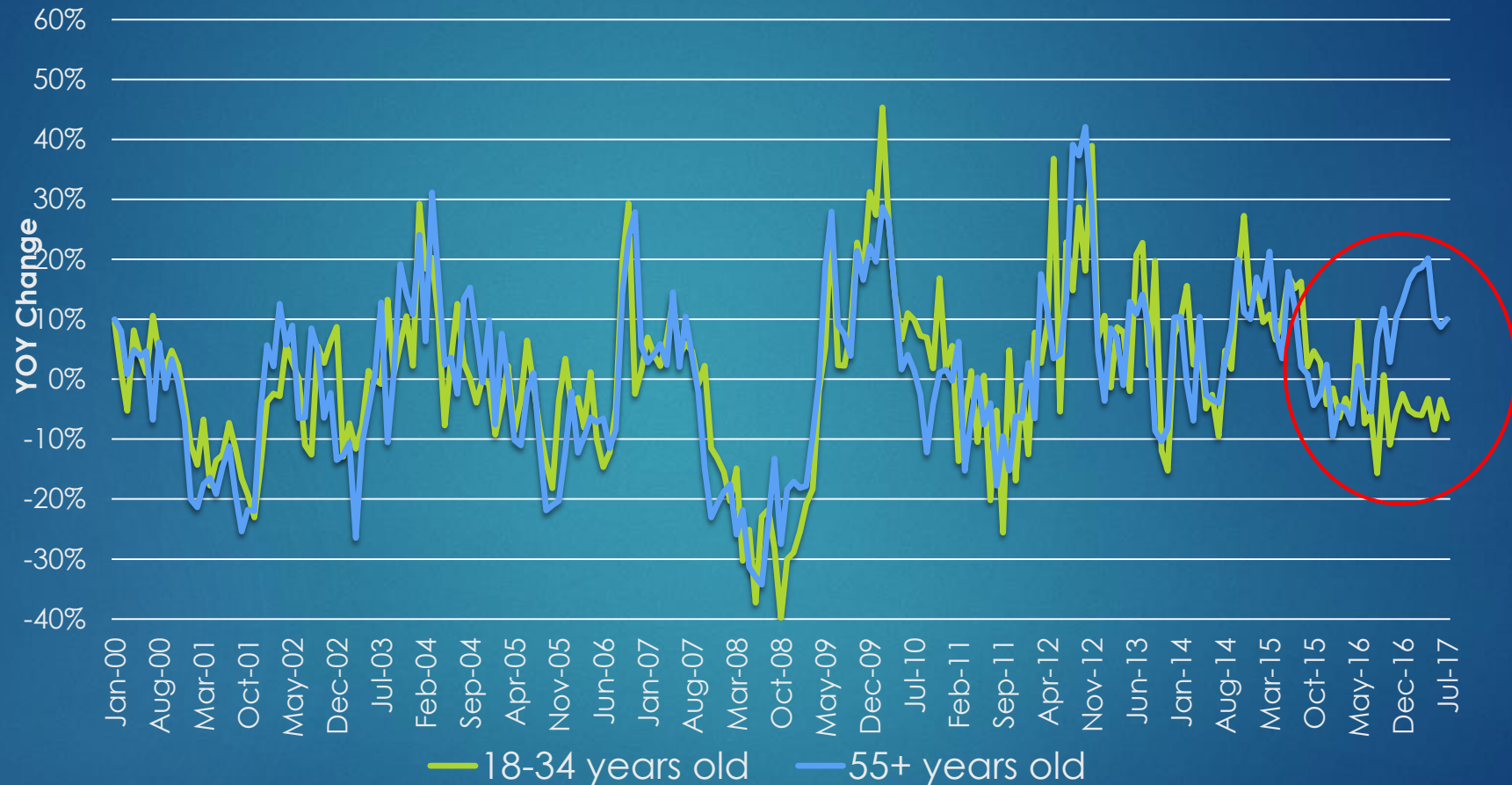
source: BEA, Philadelphia Fed

Consumer Confidence Index



Average duration from peak to valley: 33 mo.
 Average duration from valley to peak: 57 mo.

Consumer Sentiment by Age Group



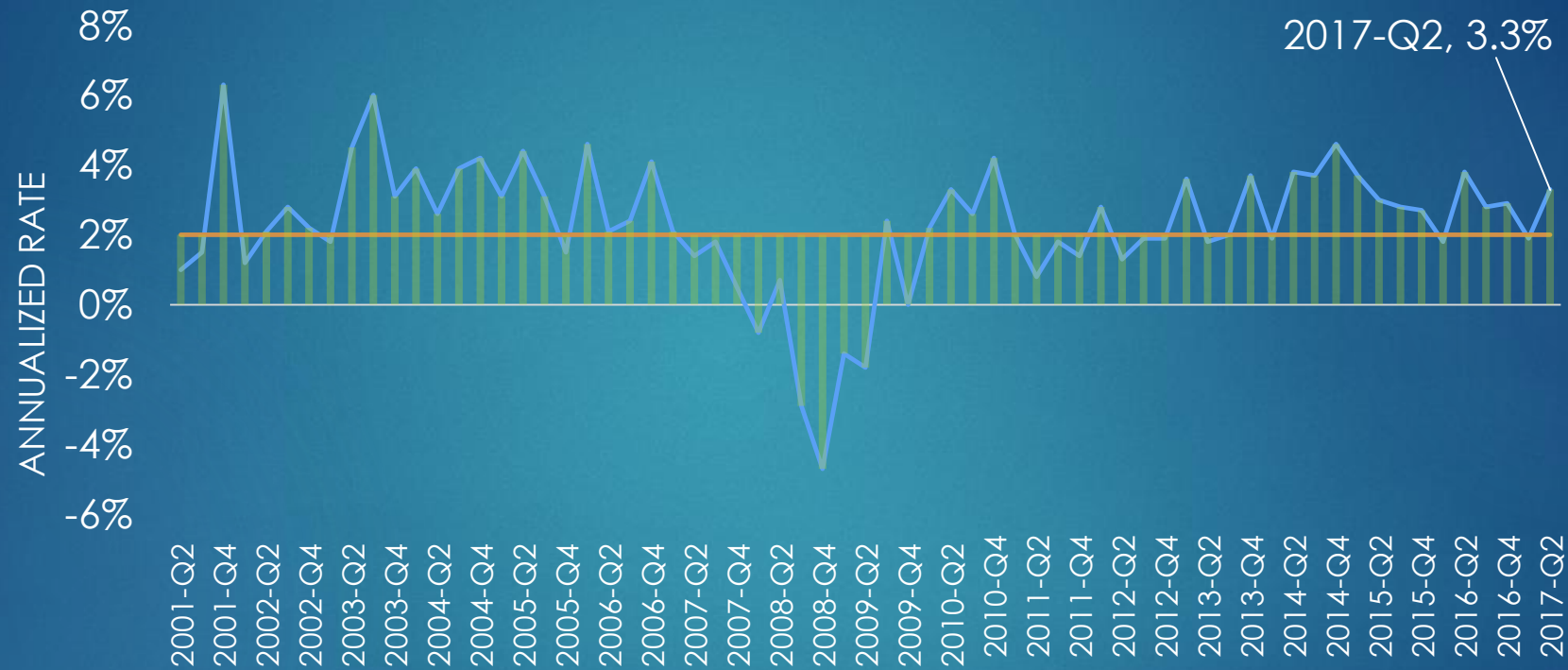
source: University of Michigan/Haver Analytics

U.S. City Retail Gas Prices



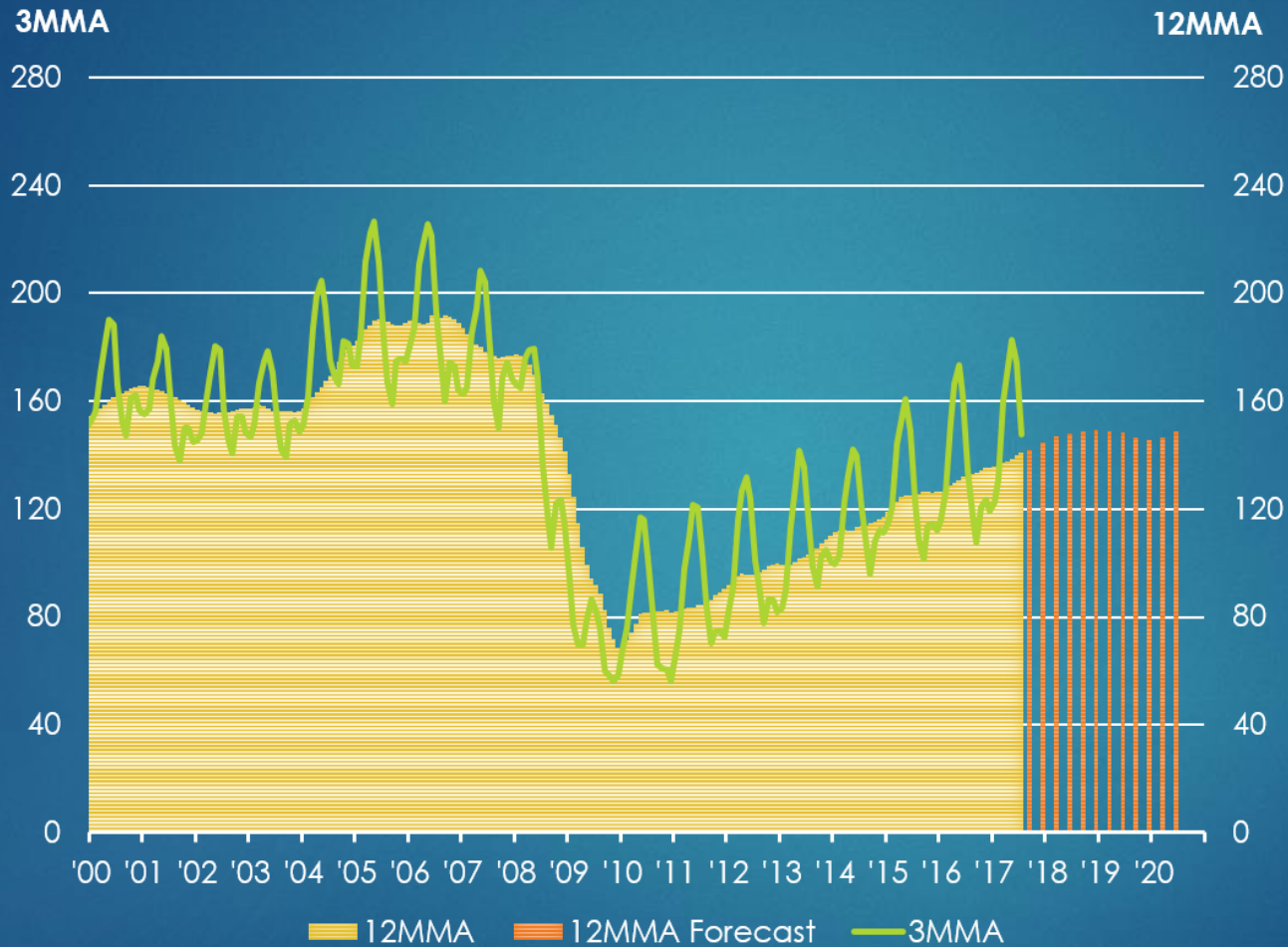
source: EIA

Consumer Spending



source: BEA

Wholesale Forecasts



QUARTERLY PRODUCTION
(3MMA)

147.9

ANNUAL PRODUCTION
(12MMA)

141.0

OUTLOOK

Annual Production will generally rise through 2018.

Production will subsequently decline through 2019. Anticipate rise resuming during at least the first half of 2020.

MANAGEMENT NOTE

Invest in increasing efficiencies as Production rises through 2018 to levels not seen since prior to the Great Recession.

source: ITR Economics

Have a Great Show!

