

STATE OF THE U.S. RECREATIONAL BOATING INDUSTRY

Thom Dammrich, President, NMMA



WELCOME!











75th ANNIVERSARY | MIAMI MARINE STADIUM PARK & BASIN | **1941-2016**

PROGRESSIVE MIAMI INTERNATIONAL BOAT SHOW

MAKING DOLLARS & SENSE FOR SOUTH FLORIDA

ECONOMIC IMPACT

\$600 MILLION
Annual economic activity generated by the boat show*

1,200 TOTAL SHOW EXHIBITORS

\$312.2 MILLION Estimated sales for Florida companies

6,592 employed full time by Miami Boat Show*

33 Percent of exhibitors based in Dade, Broward or Palm Beach county*

SHOP

BOATING A BOON IN FLORIDA**

- Boating industry supports 55,000 middle-class Florida jobs
- #1 boating state: \$2.3 billion annual retail sales of new boats, engines & marine accessories in Florida
- #1 in boat registrations: 670,749

CONNECTIONS

500 INTERNATIONAL BUYERS FROM MORE THAN **26** COUNTRIES

MIAMI BOAT SHOW FACTS

- More than 1,200 boats, plus marine accessories, electronics, engines, nautical gifts and apparel and services
- 500 slips in a deep water basin to accommodate boats of all sizes

AN ISLAND ESCAPE
everything in one place on land and in the water

FUN, EASY WAYS TO VISIT THE SHOW

- RESERVE PARKING IN ADVANCE AT MIAMI BOAT SHOW.COM**
- PARKING FOR 12,000 VEHICLES**
Parking at American Airlines Arena, Marlins Stadium and more in downtown Miami
- FREE SHUTTLES, FREE WATER TAXIS TO THE SHOW**

ON-WATER ACTIVITIES, EDUCATION, NEW ENTERPRISES

TOURISM IMPACT

\$30.4 MILLION Excise and sales tax generated within Florida

ESTIMATED EXPENDITURES OF OUT-OF-TOWN VISITORS AND EXHIBITORS

\$83 MILLION

100K Visitors from around the globe

200K Nights in a hotel room

70%

Economic Activity

- \$597 million annual economic impact
- \$300 million in annual sales
- Connects 500+ international buyers
- Supports 6,500 full time jobs

* Data for economic impact, jobs and businesses is taken from the NMMA 2013 economic impact study. ** Source: National Marine Manufacturers Association, 2014 U.S. Recreational Boating Statistical Abstract

MIAMI 2016



WE WANT YOU

WHAT'S HAPPENING?

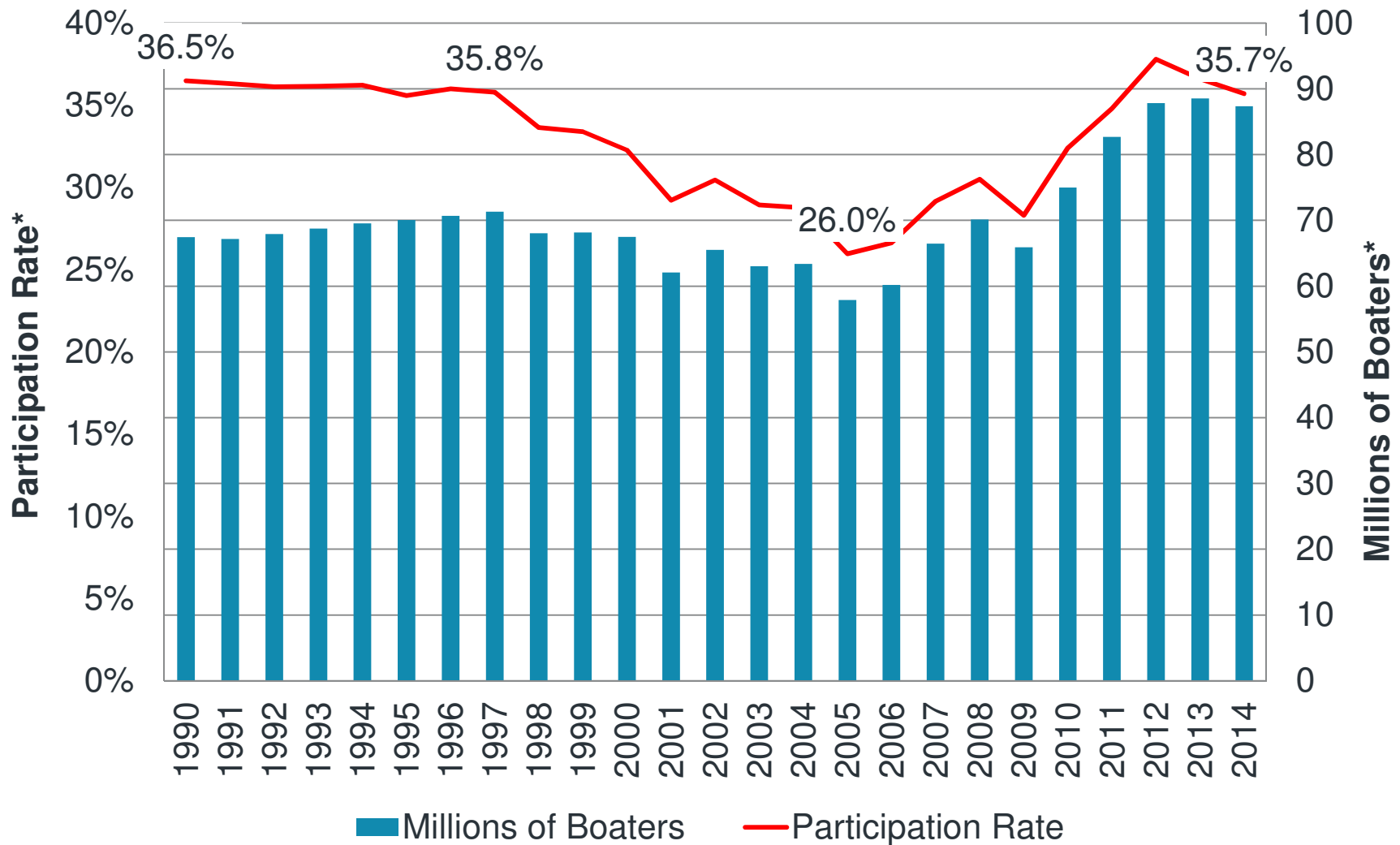


BOATING IS PERVASIVE

- 3 billion boating exposure hours
- More than 300 million boating trips in 2012



BOATING PARTICIPATION



*Adults 18 years of age and older

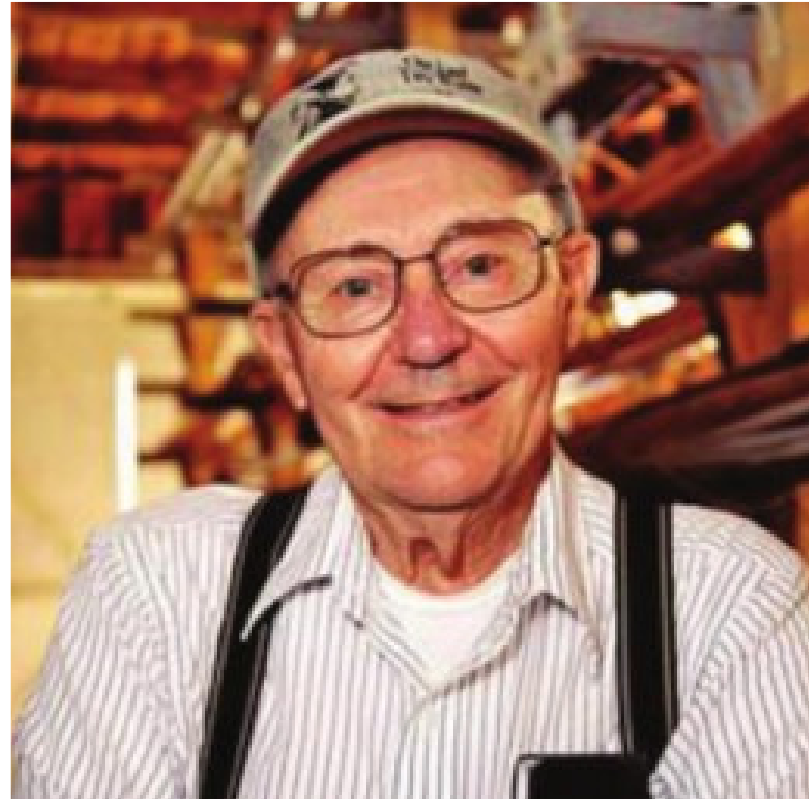
Source: Foresight Research, U.S. Census Bureau

RECREATIONAL BOATING

95% of boats sold in the U.S. are made in the U.S.



97% of U.S boat manufacturers are family owned and operated **small businesses.**



INDUSTRY ECOSYSTEM

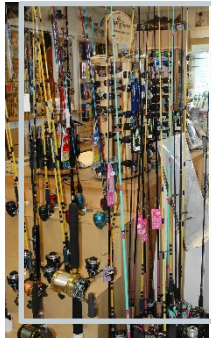
Marinas



Boaters



Retailers



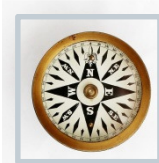
Boats



Engines

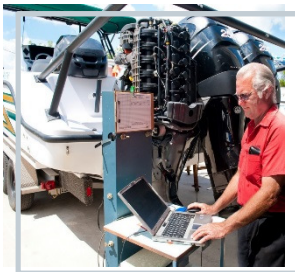


Manufacturers

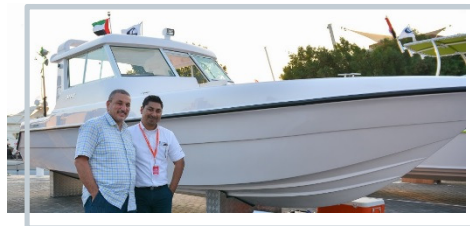


Accessories

Service providers



Brokers



Dealers



BOATING'S ECONOMIC IMPACT



\$121.5 Billion annual
Economic Impact



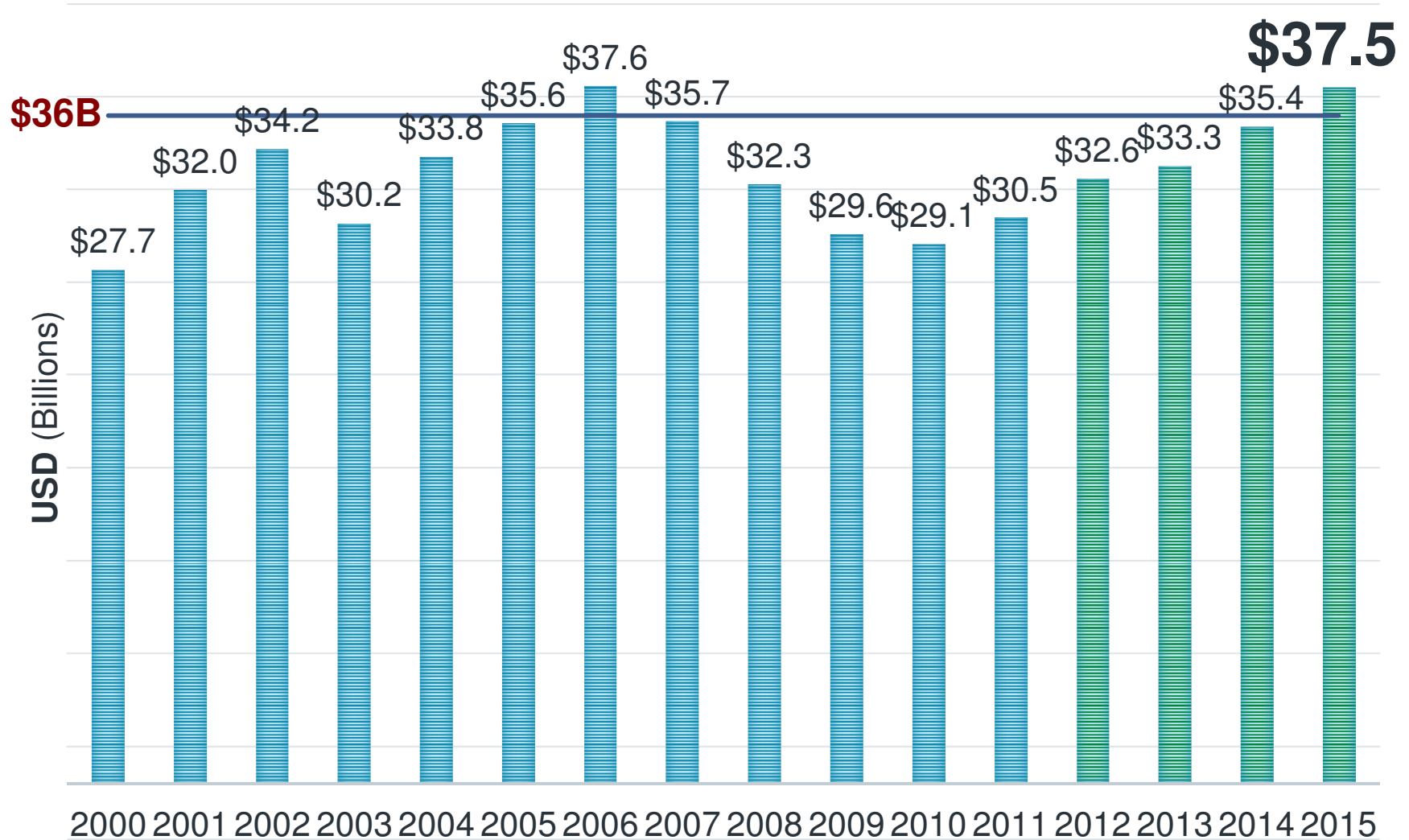
Sustains **34,833**
businesses



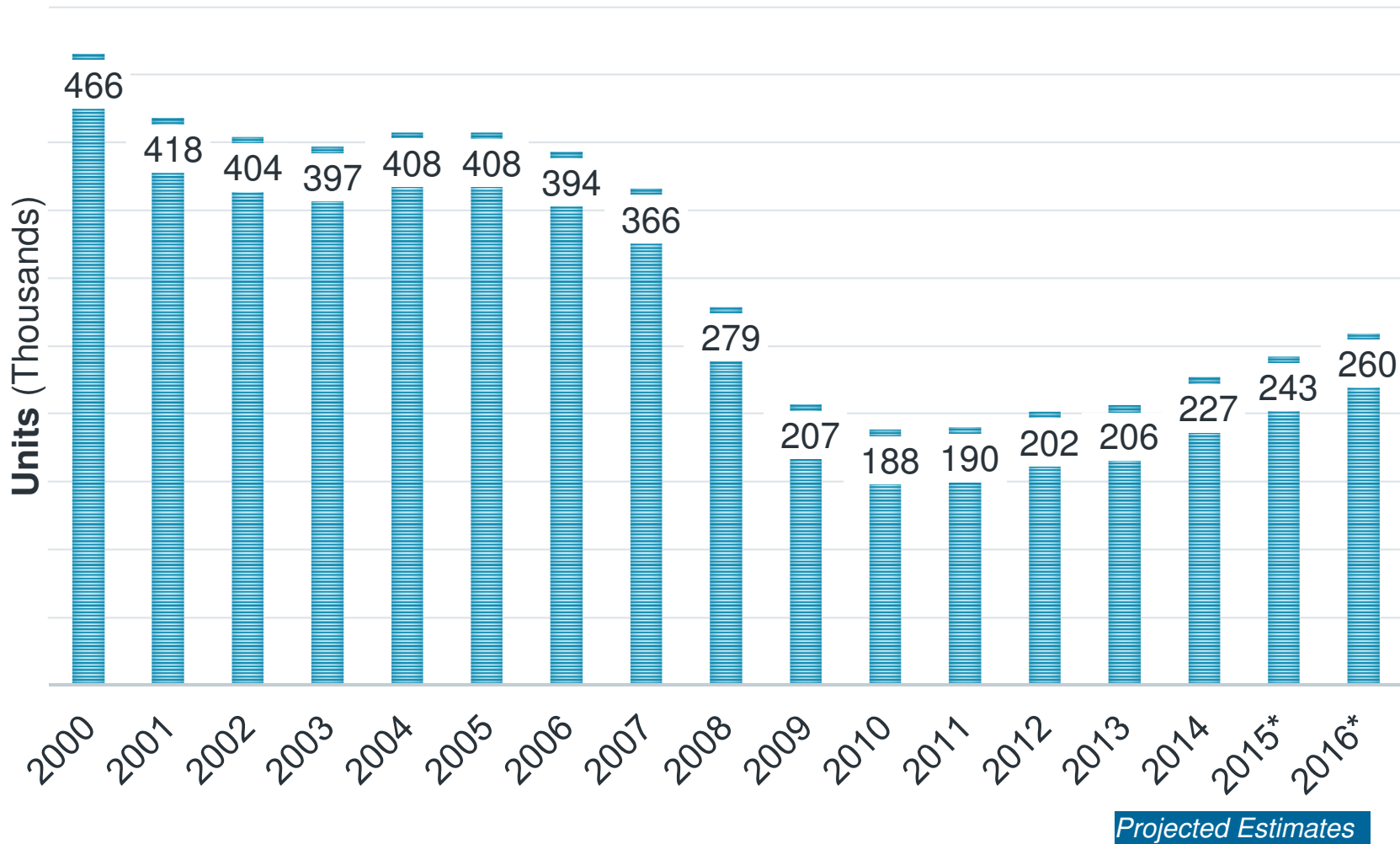
Employs **472,593** direct
jobs



U.S. RETAIL SPENDING ON BOATING

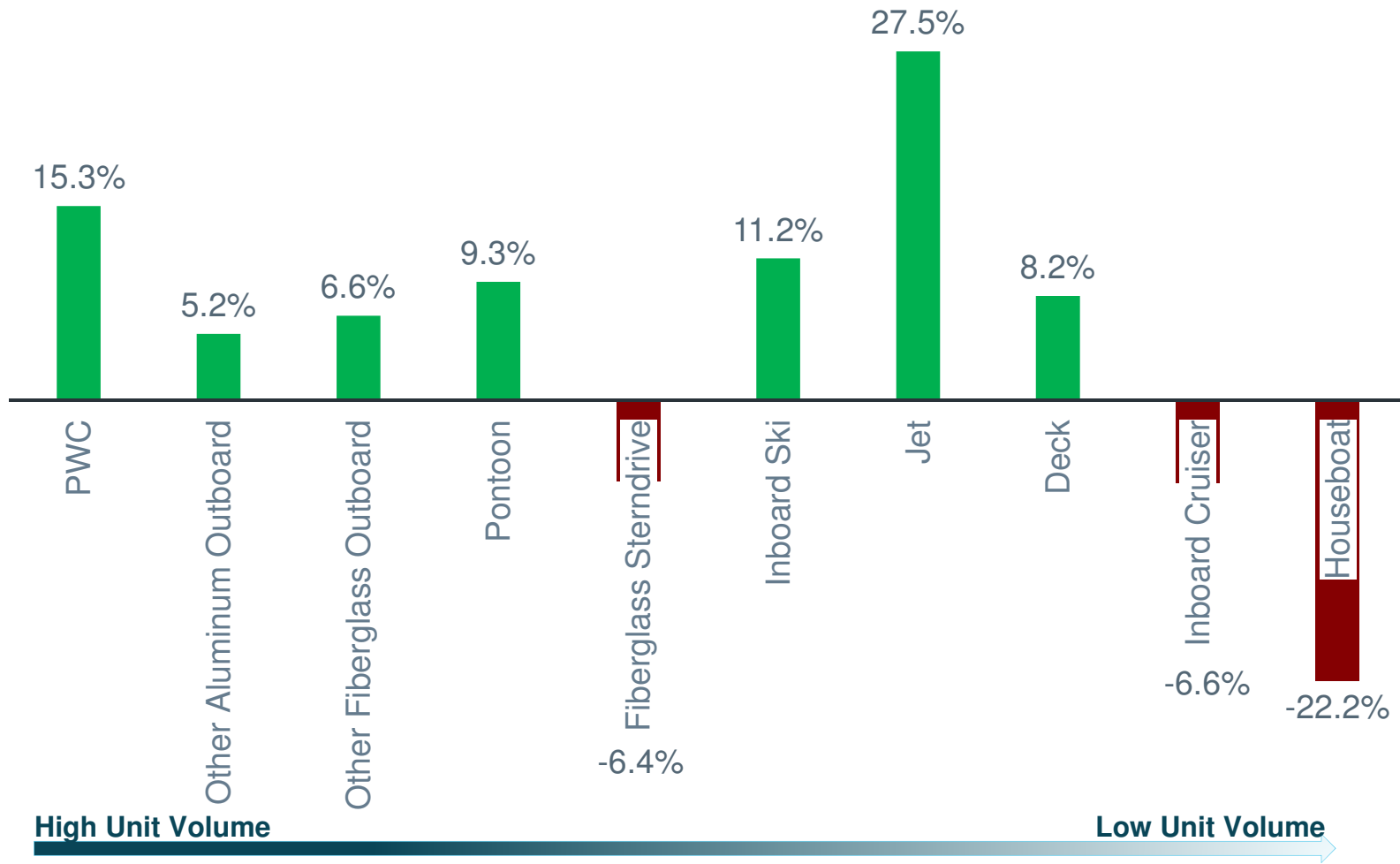


POWERBOAT, PWC, AND SAILBOAT RETAIL SALES

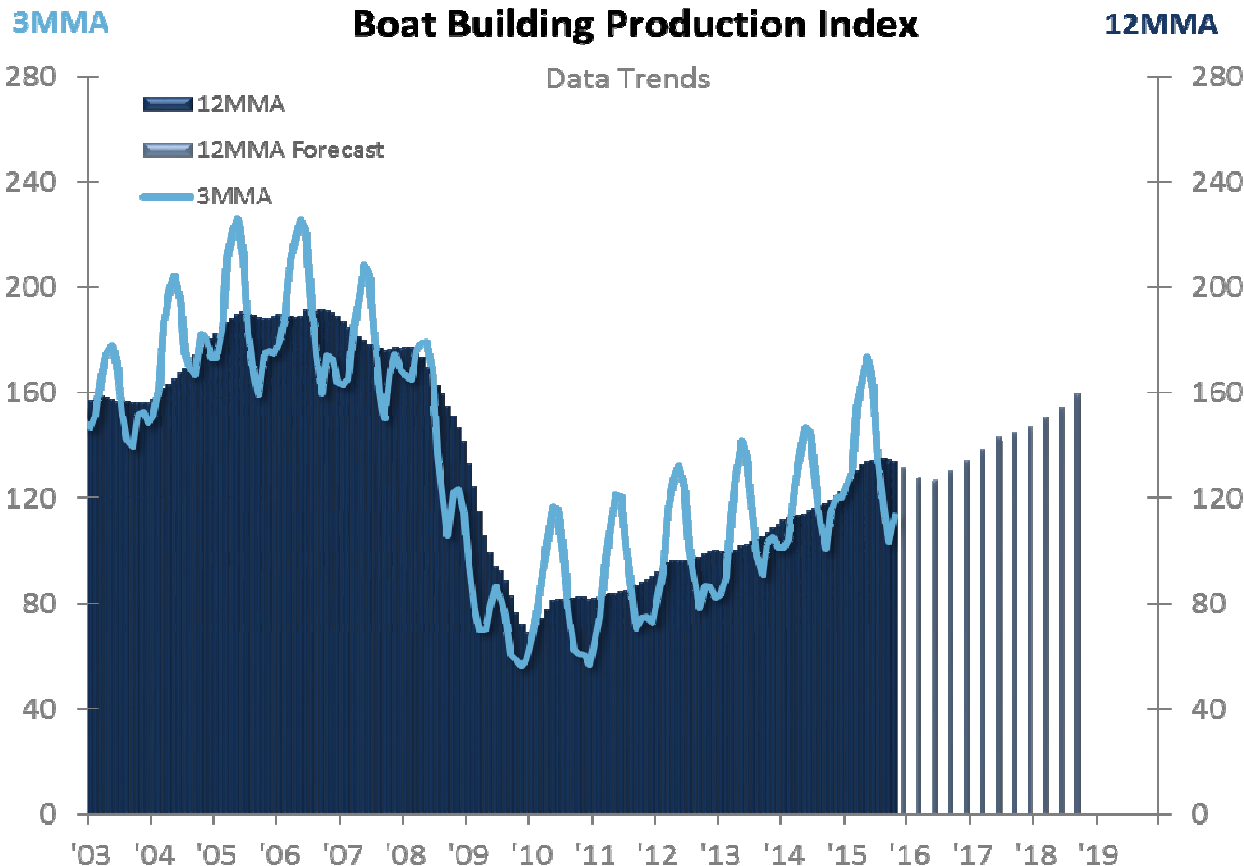


GROWTH IN 2015

11/15 YTD YOY Change - Bellwether Retail Sales



BOAT BUILDING PRODUCTION INDEX



QUARTERLY PRODUCTION (3MMA)

112.9

ANNUAL PRODUCTION (12MMA)

133.9

OUTLOOK

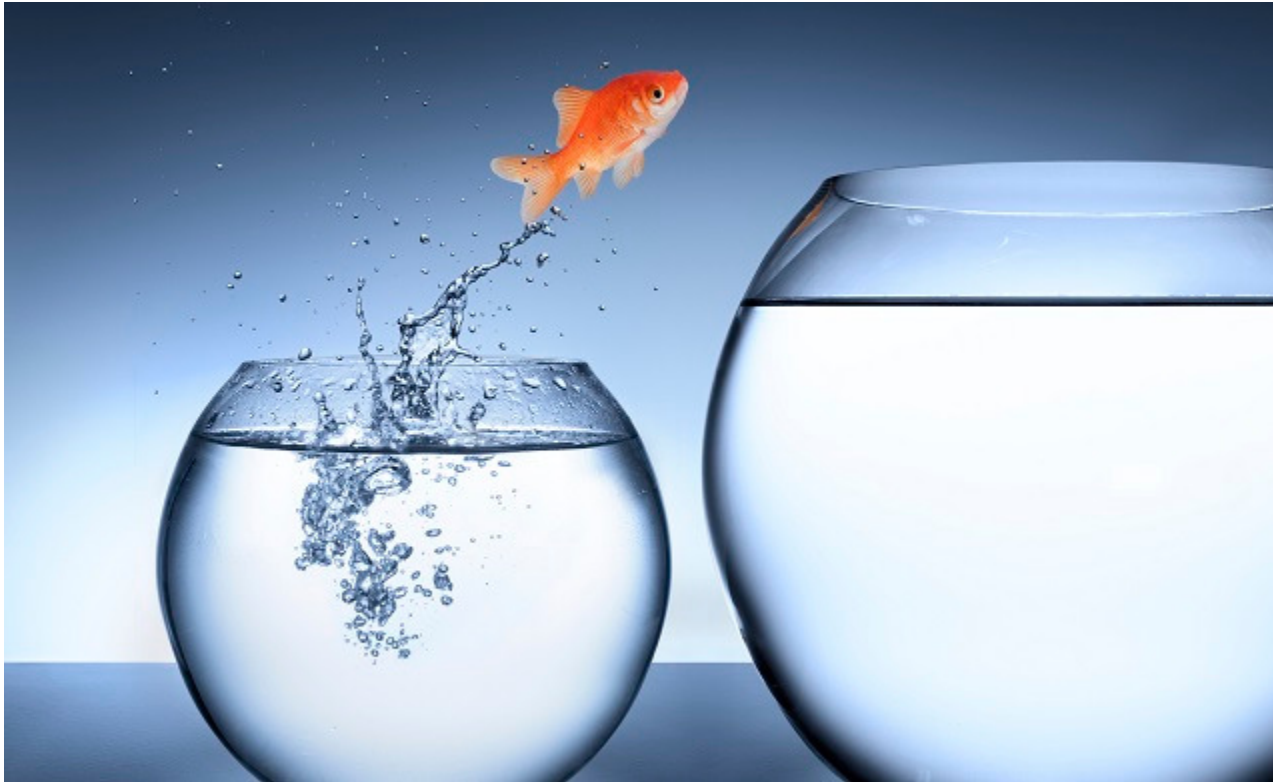
The Production 12MMA will fall through mid-2016 before subsequently rising through at least the first three quarters of 2018.

MANAGEMENT NOTE

Lead with optimism. The second half of 2016 will be stronger than the first half of the year.

	Dec-15	Mar-16	Jun-16	Sep-16	Dec-16	Mar-17	Jun-17	Sep-17	Dec-17	Mar-18	Jun-18	Sep-18
Lower Forecast Range	130.0	126.3	125.4	128.1	132.3	136.7	141.4	142.8	144.8	148.1	151.9	156.4
Annual Production (12MMA)	131.4	127.8	127.2	130.1	134.2	138.7	143.6	145.0	147.3	150.8	154.8	159.3
Upper Forecast Range	132.7	129.4	128.9	132.2	136.2	140.8	145.7	147.2	149.7	153.4	157.6	162.2

INDUSTRY OPPORTUNITIES



INTERNATIONAL OPPORTUNITIES

Colombia may be Latin America's best revival story to become the region's next top boating destination!



2016 International
Nautical Congress

April 27–29, 2016

Cartagena de Indias



Register at ColombiaNautica.com

Organized by:



2015 ADVOCACY SUCCESSES



2016 ELECTIONS



www.BoatPACinsider.com

ADVOCACY OPPORTUNITIES



May 9-11

Washington, D.C.
Renaissance Hotel

- Better coordination
- Regular co-host calls
- Stronger advocacy

CONSERVATION OPPORTUNITIES

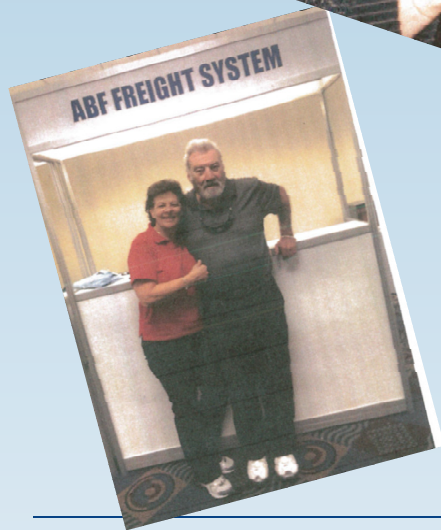


Center for Coastal Conservation

MOVING FORWARD



NEW BEGINNINGS



THANK YOU, CATHY



GREAT WEEKEND



MIAMI 2016



THANK YOU!