

STATE OF THE U.S. RECREATIONAL BOATING INDUSTRY

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EVERY SATURDAY & SUNDAY!



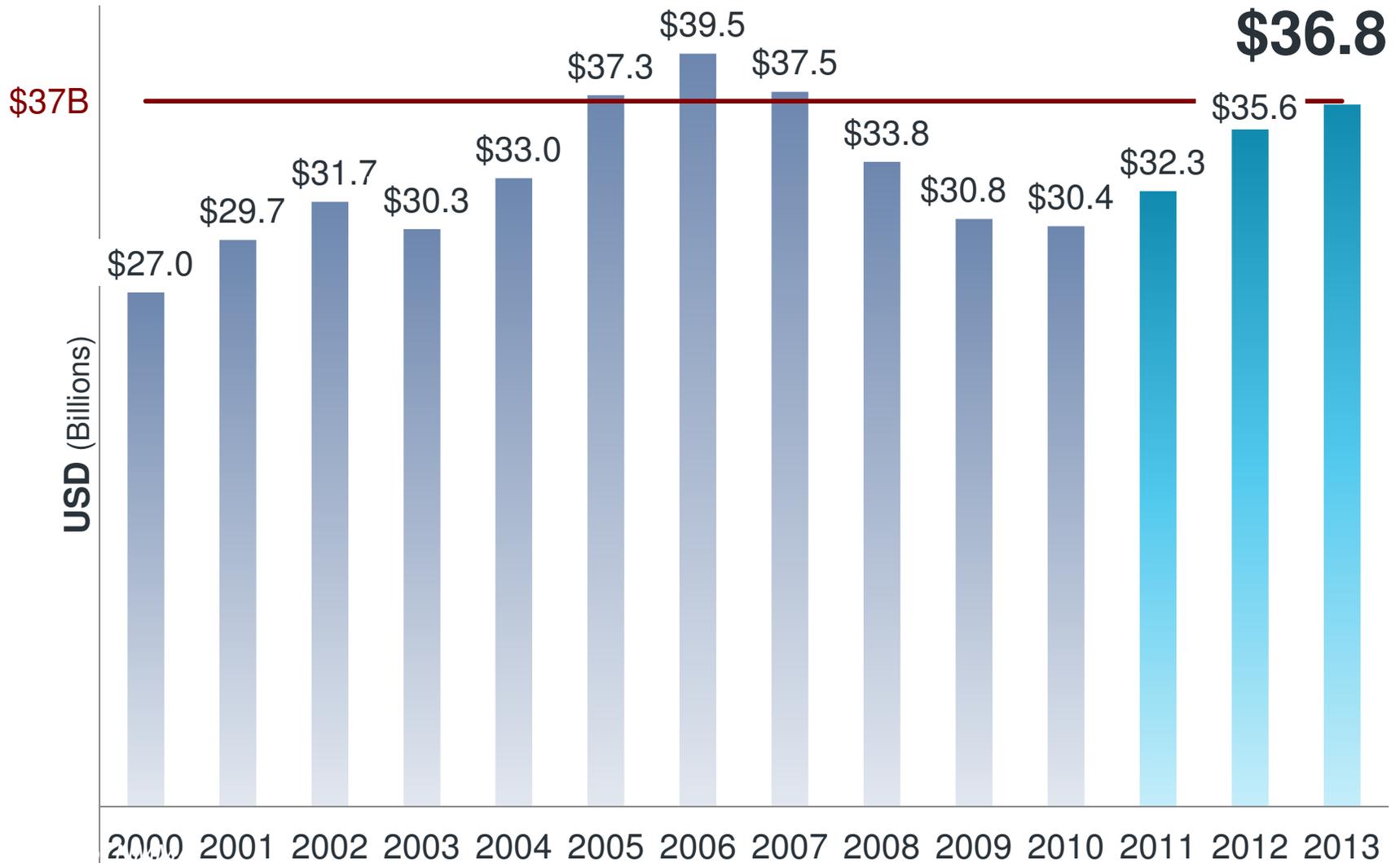
BEST OF ALL TIMES



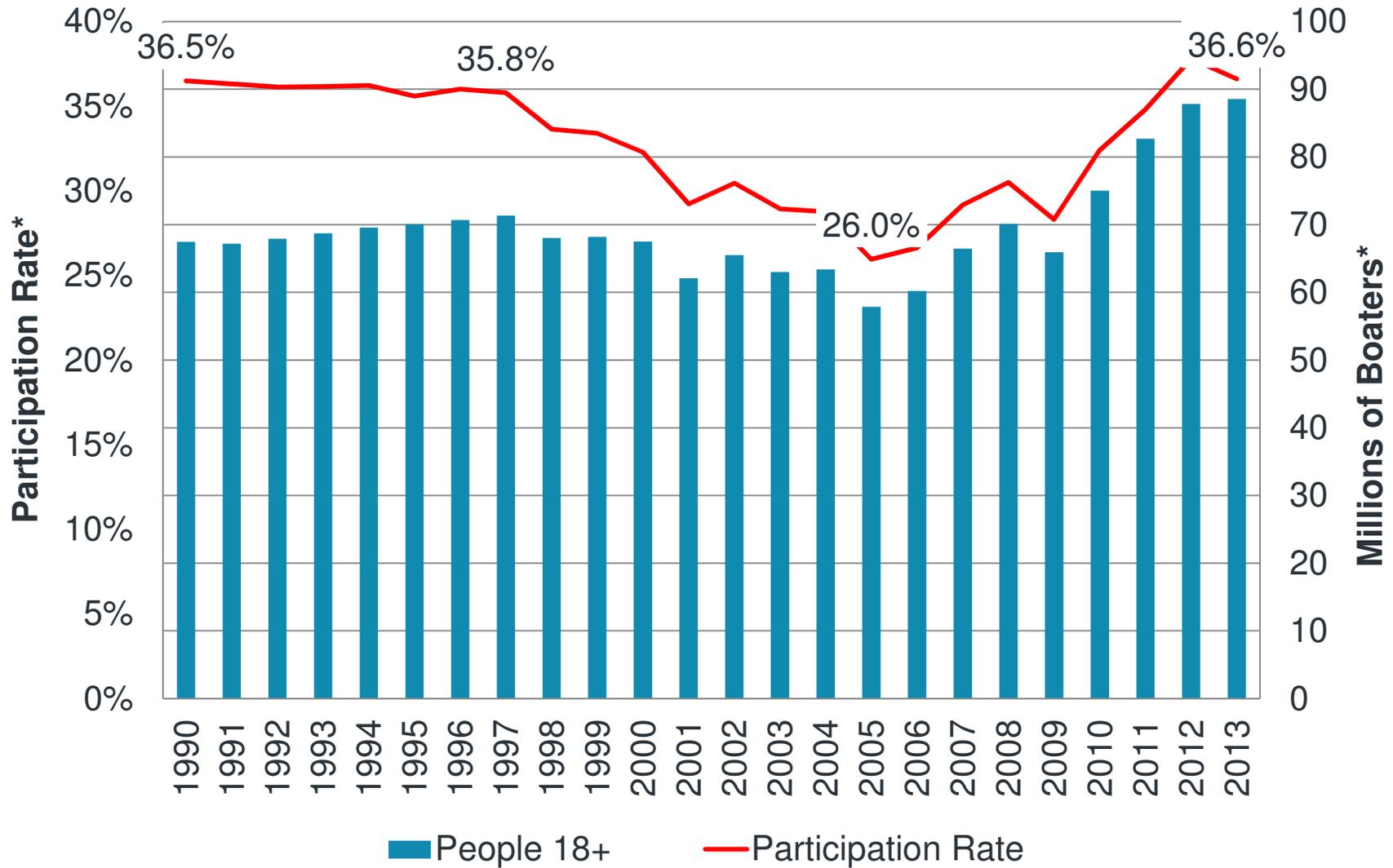
WHAT'S HAPPENING?



U.S. RETAIL SPENDING ON BOATING



BOATING PARTICIPATION



*Adults 18 years of age and older

Source: Foresight Research, U.S. Census Bureau

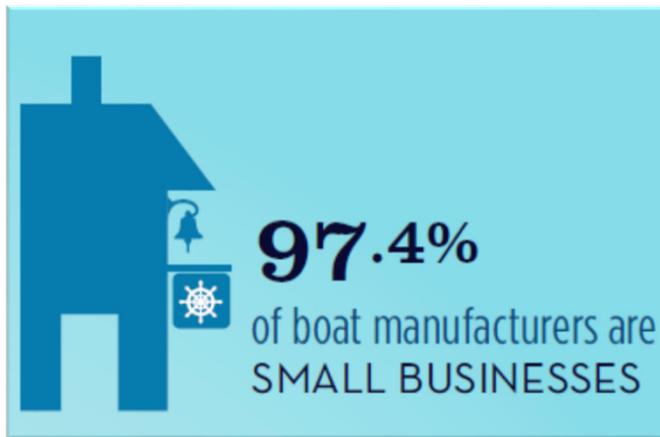
BOATING IS PERVASIVE

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



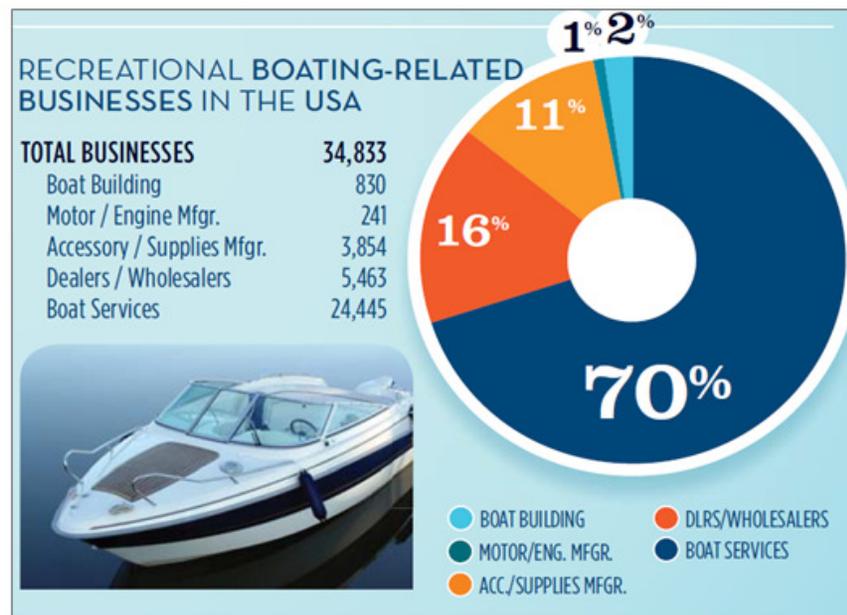
AN AMERICAN INDUSTRY

- **95%** of boats sold in the U.S. are **built in the U.S.**
- **97%** of U.S. boat manufacturers are **small businesses**
- **71%** of boat owners have a less than **\$100K HHI**

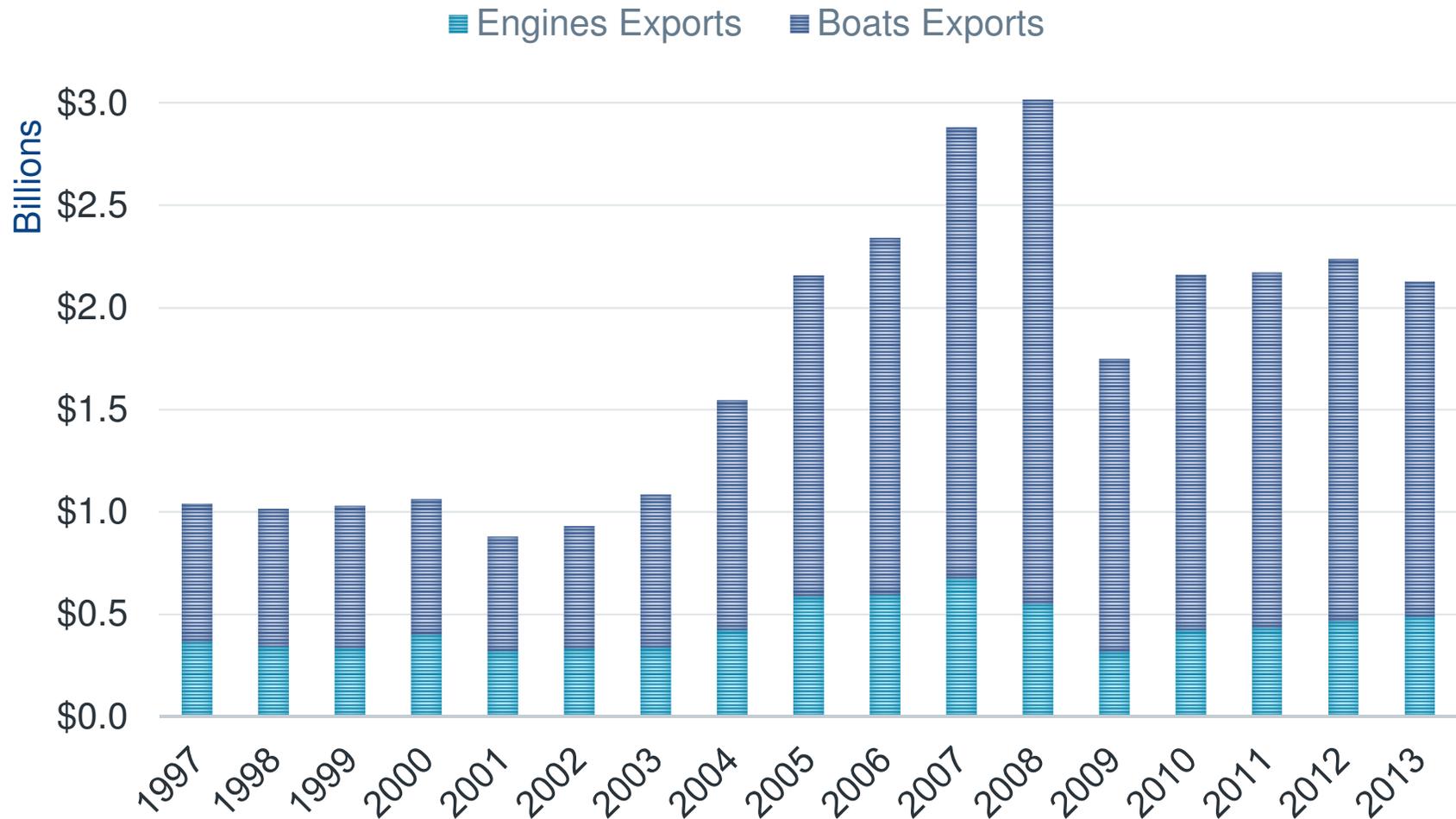


ECONOMIC VALUE OF BOATING

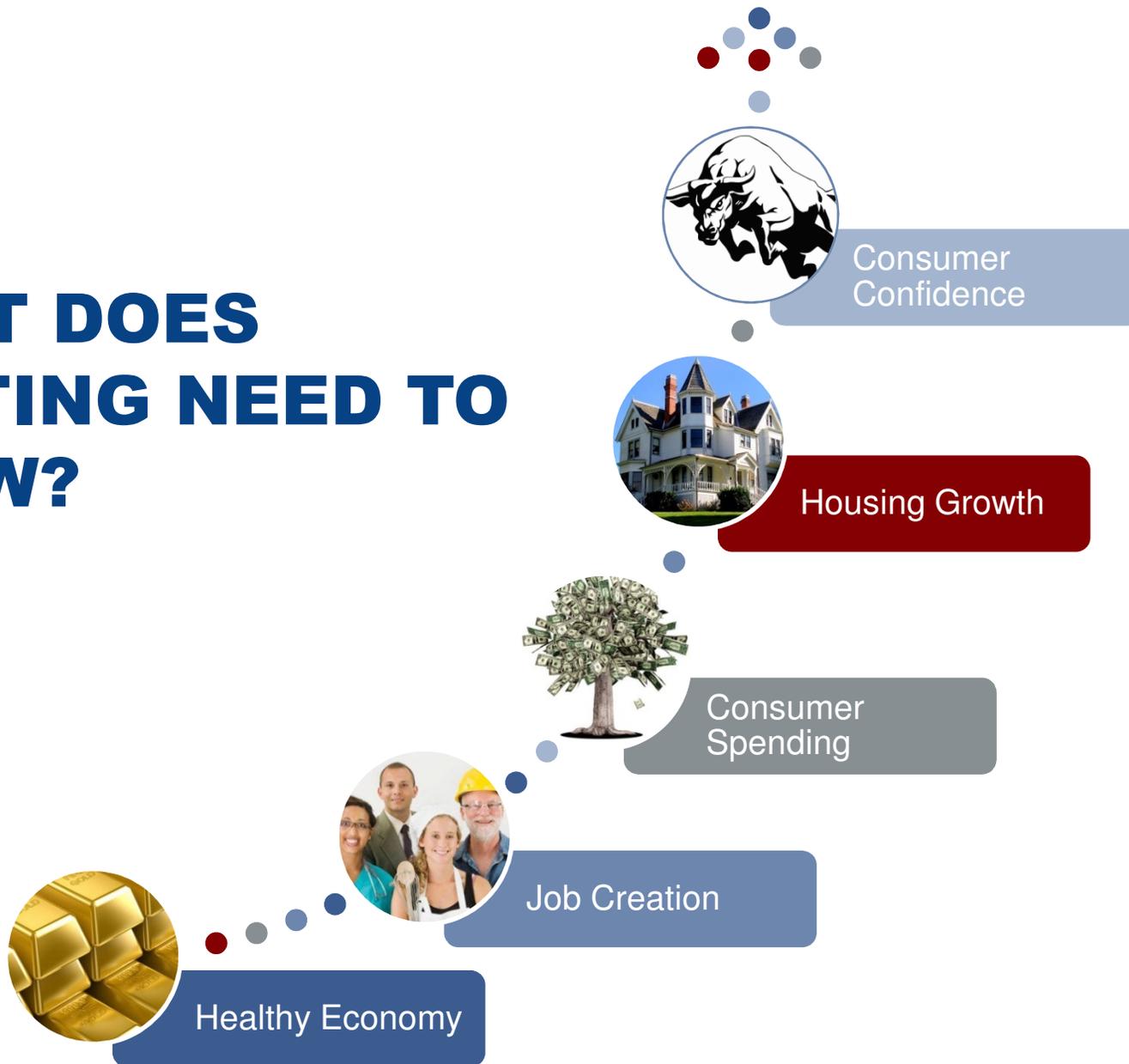
- 34,833 boating industry **businesses**
- Employing **472,594 people** in the U.S. in boating-related manufacturing, services and sales



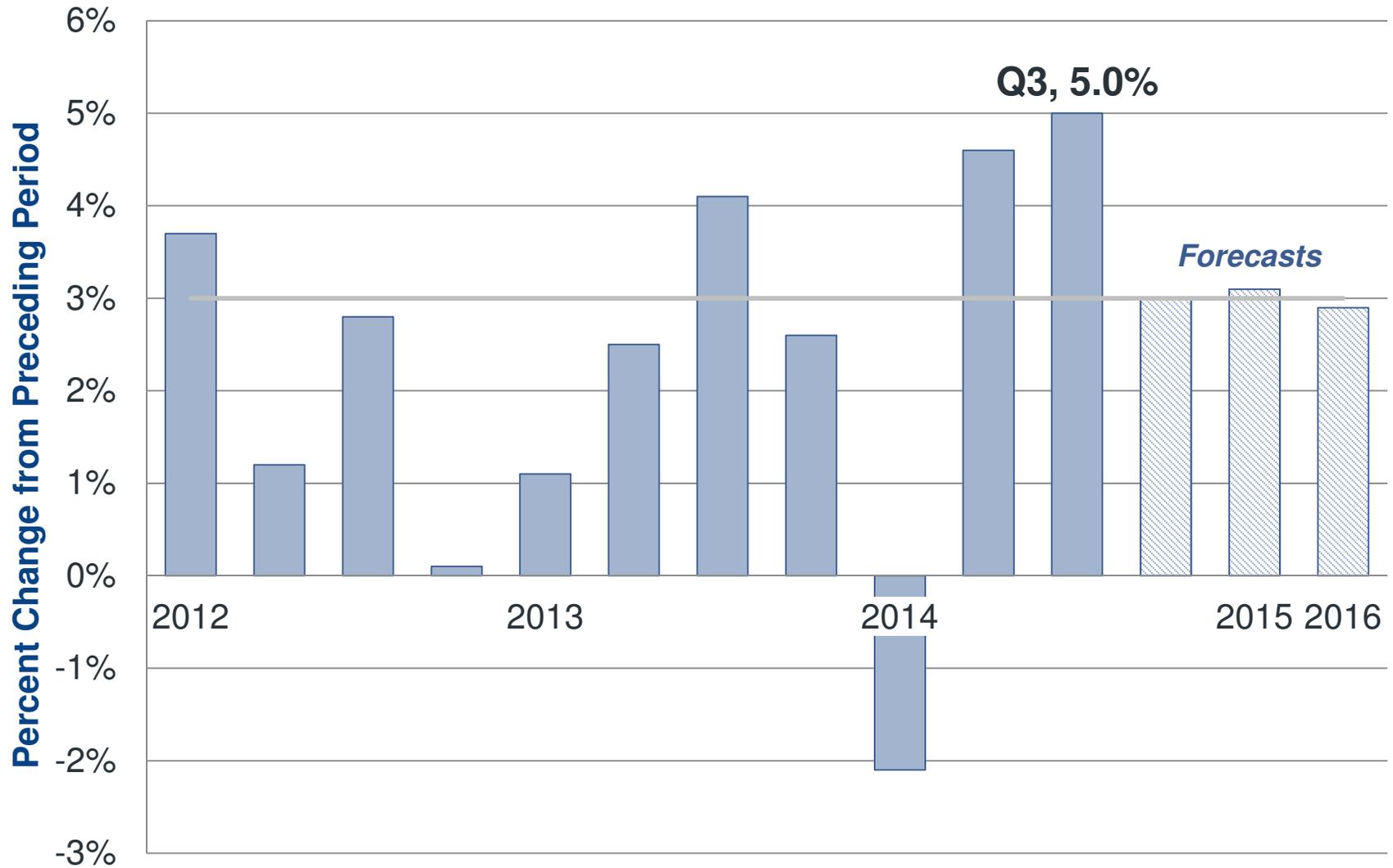
U.S. RECREATIONAL BOAT AND MARINE ENGINE EXPORTS



WHAT DOES BOATING NEED TO GROW?



REAL GDP

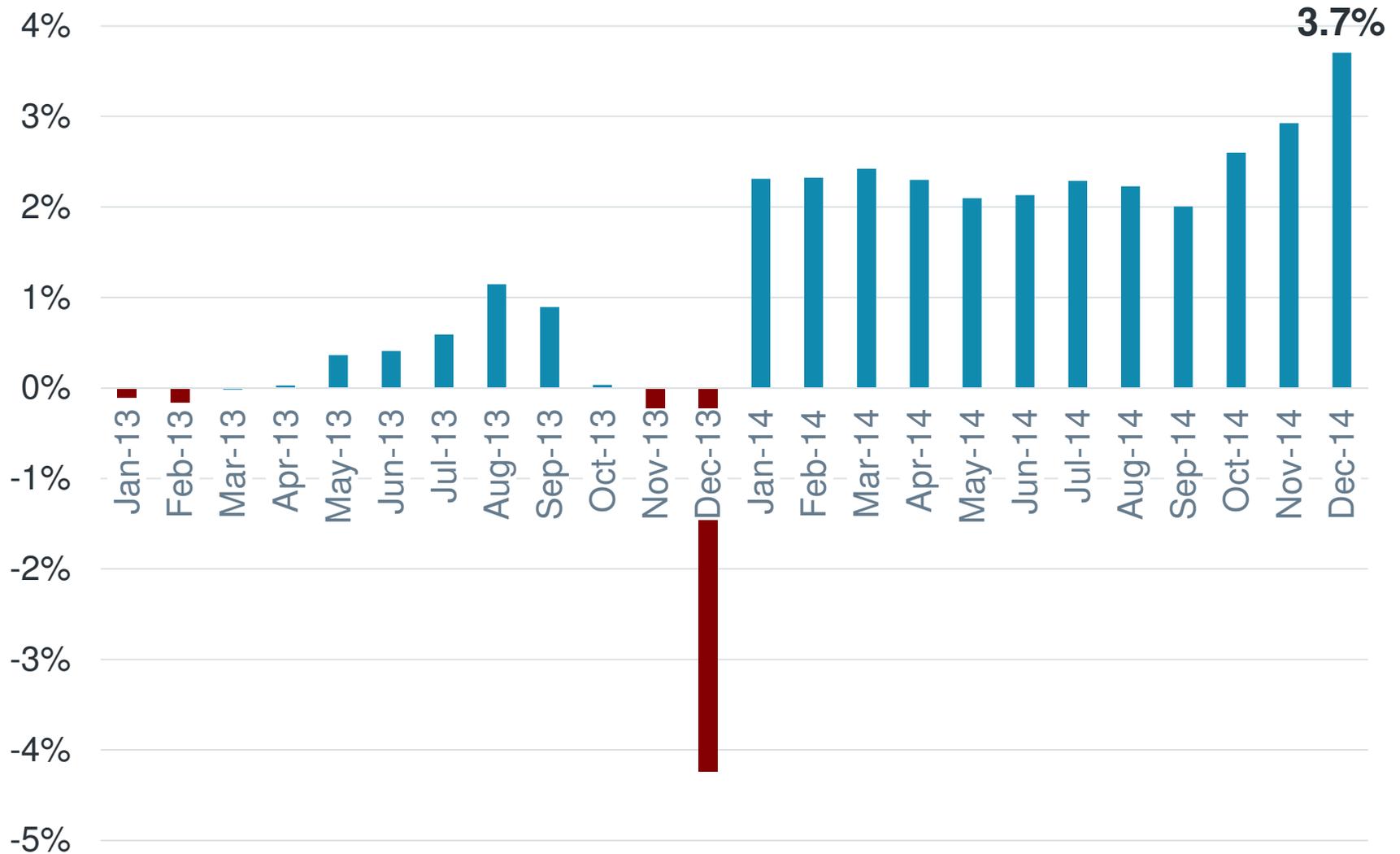




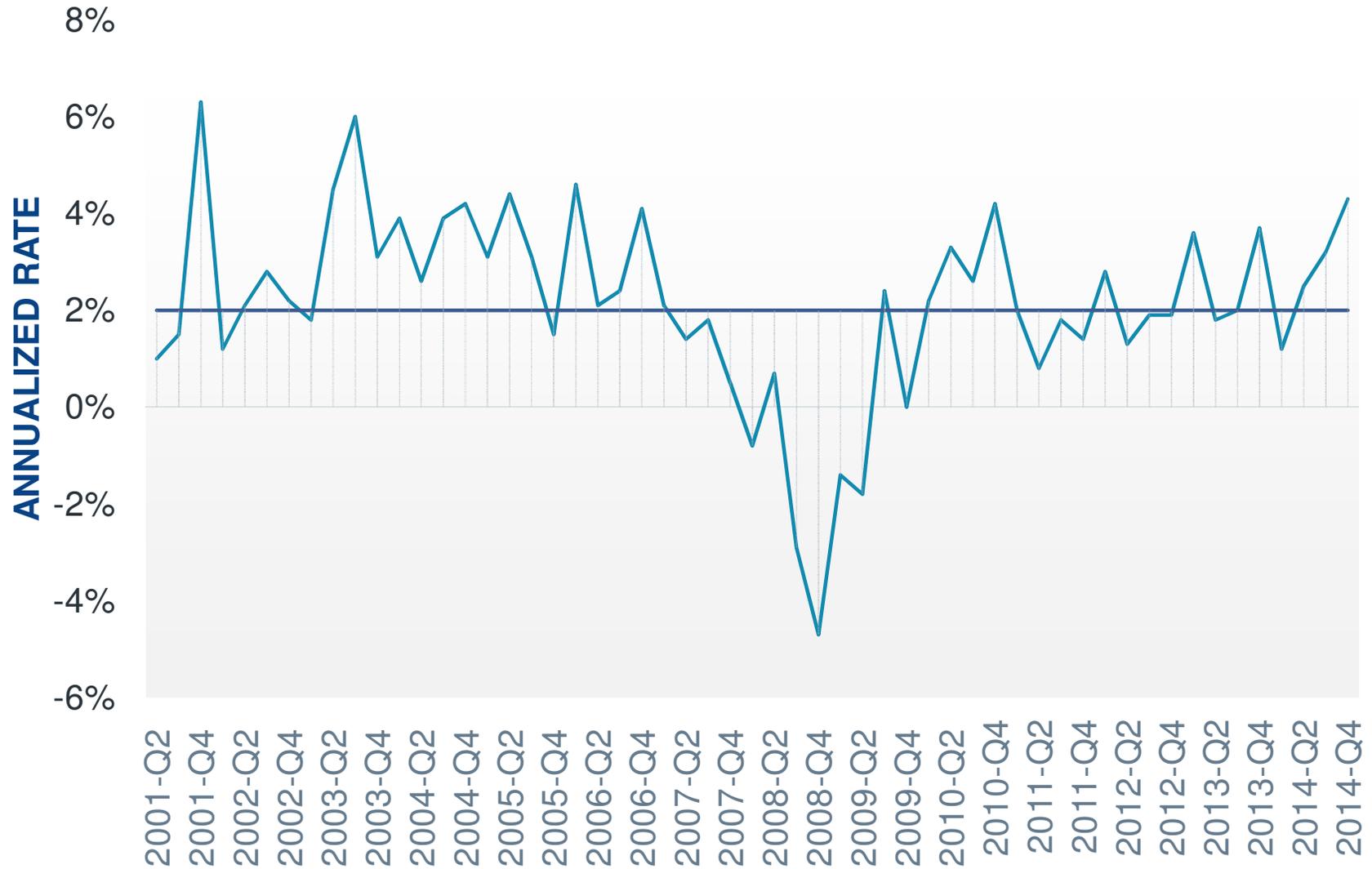
U.S. Job Creation

Unemployment Rate: **5.7%**

REAL DISPOSABLE INCOME



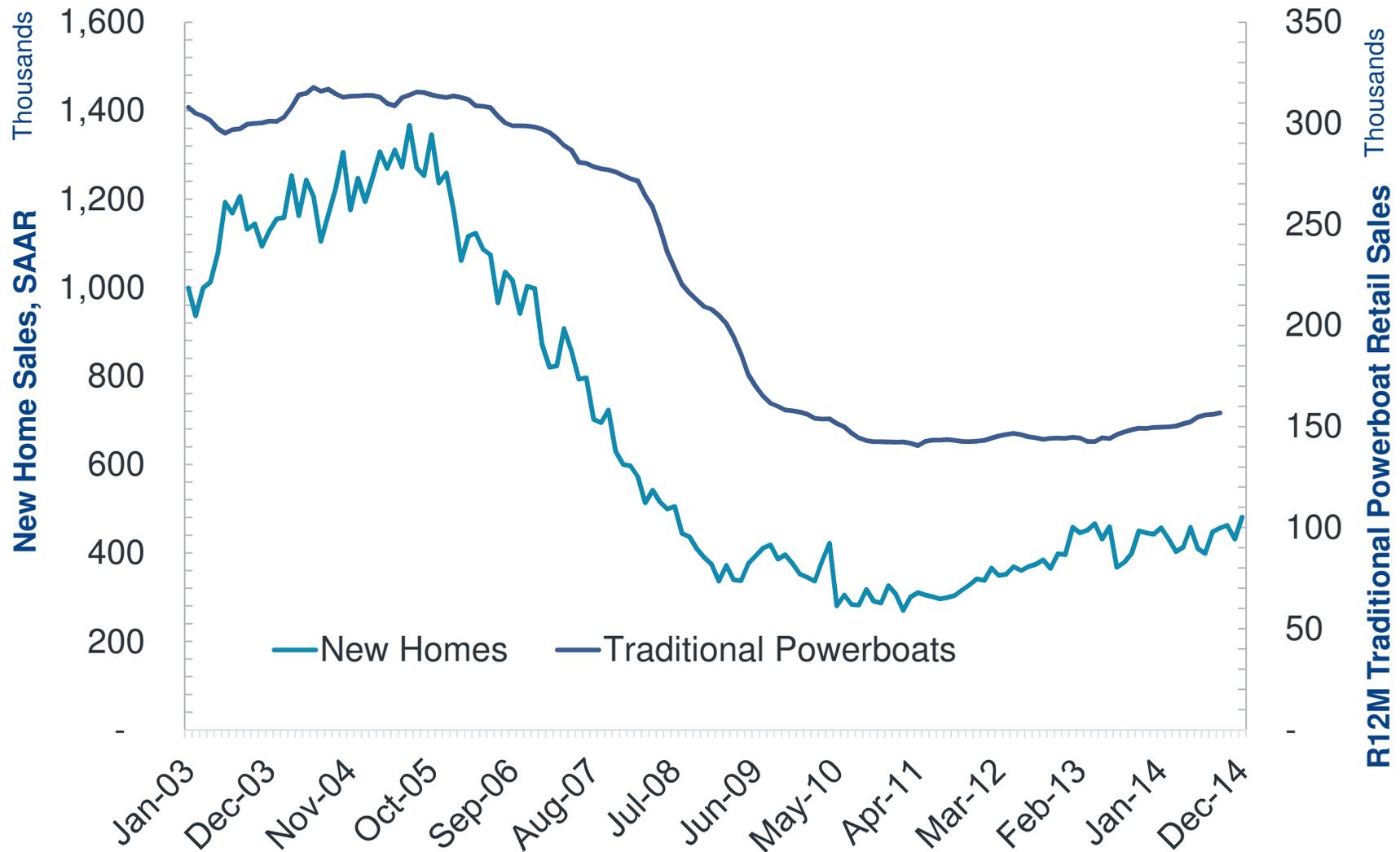
CONSUMER SPENDING

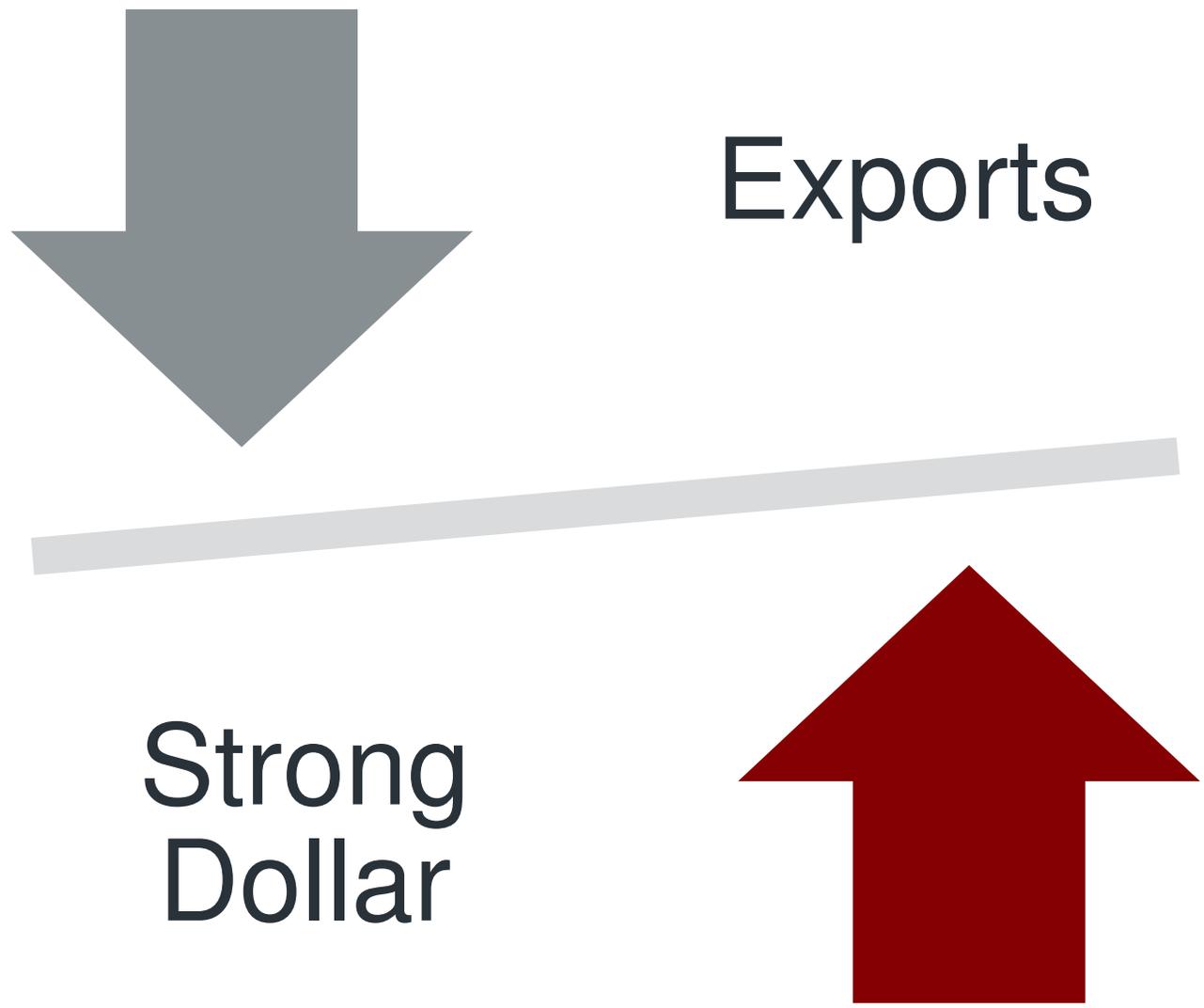


U.S. CONSUMER CONFIDENCE V. BOAT SHIPMENTS



U.S. NEW HOME SALES V. BOATS



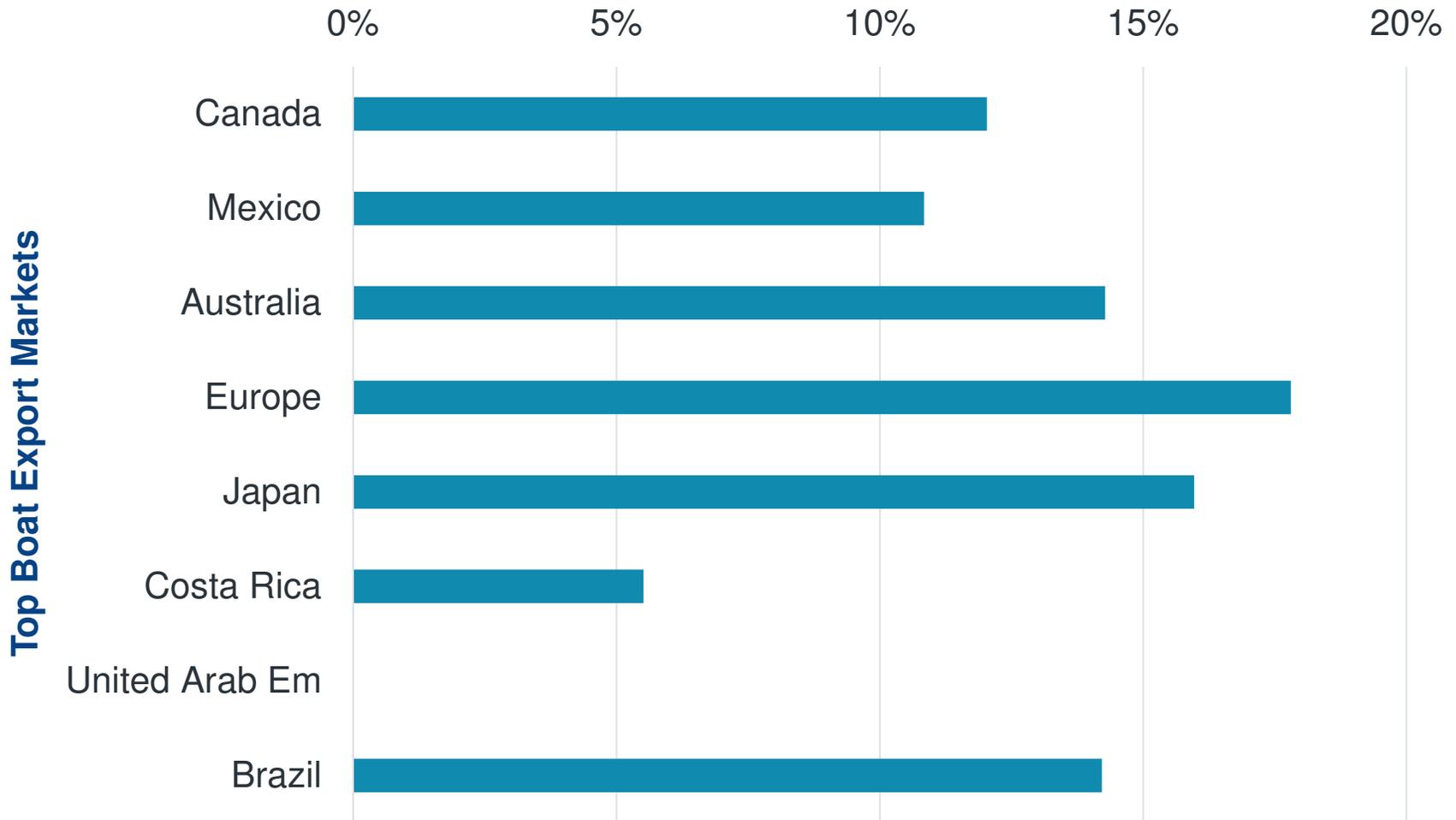


Exports

Strong
Dollar

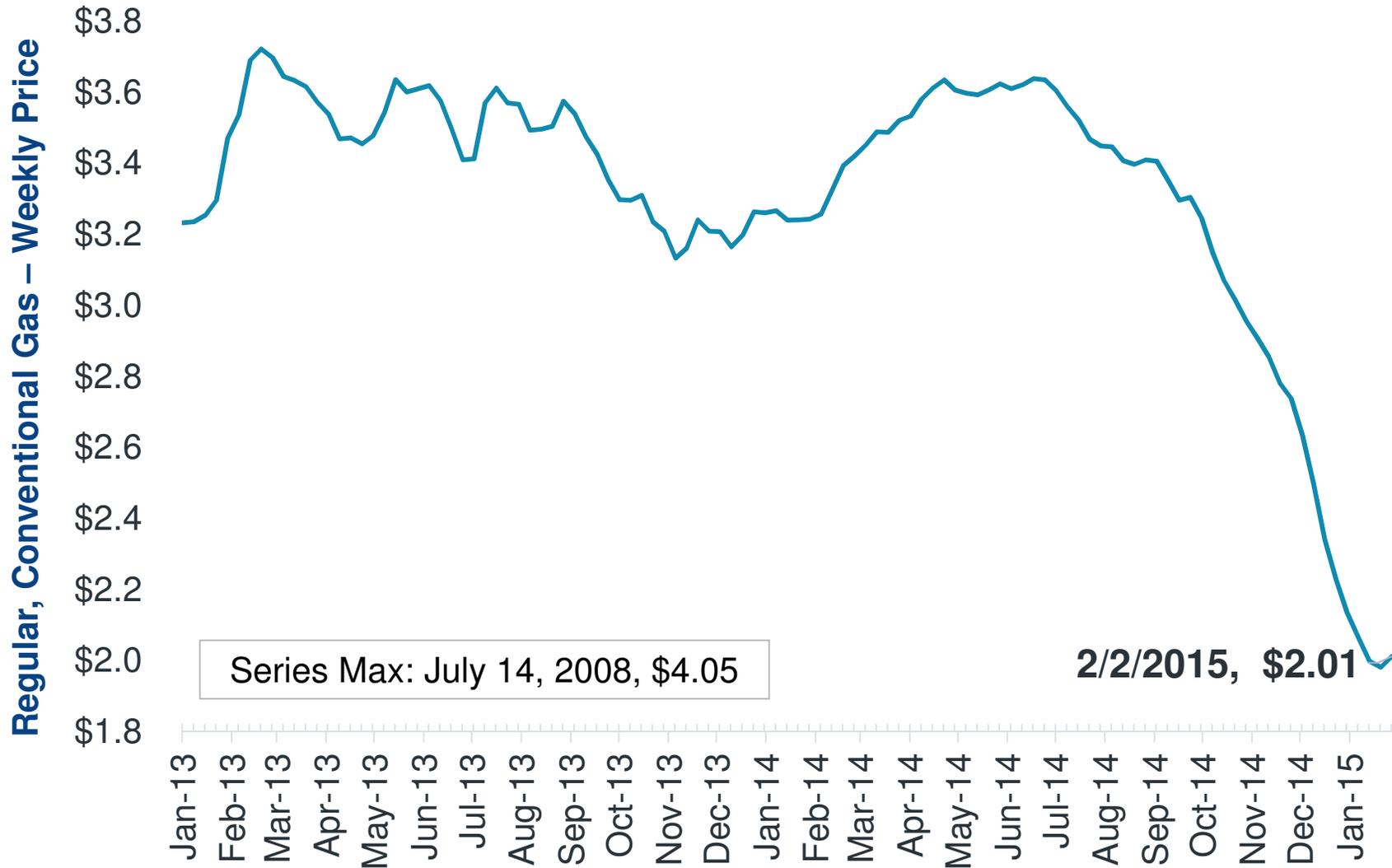
STRONG DOLLAR

USD BUYING POWER YOY GROWTH



Top Boat Export Markets

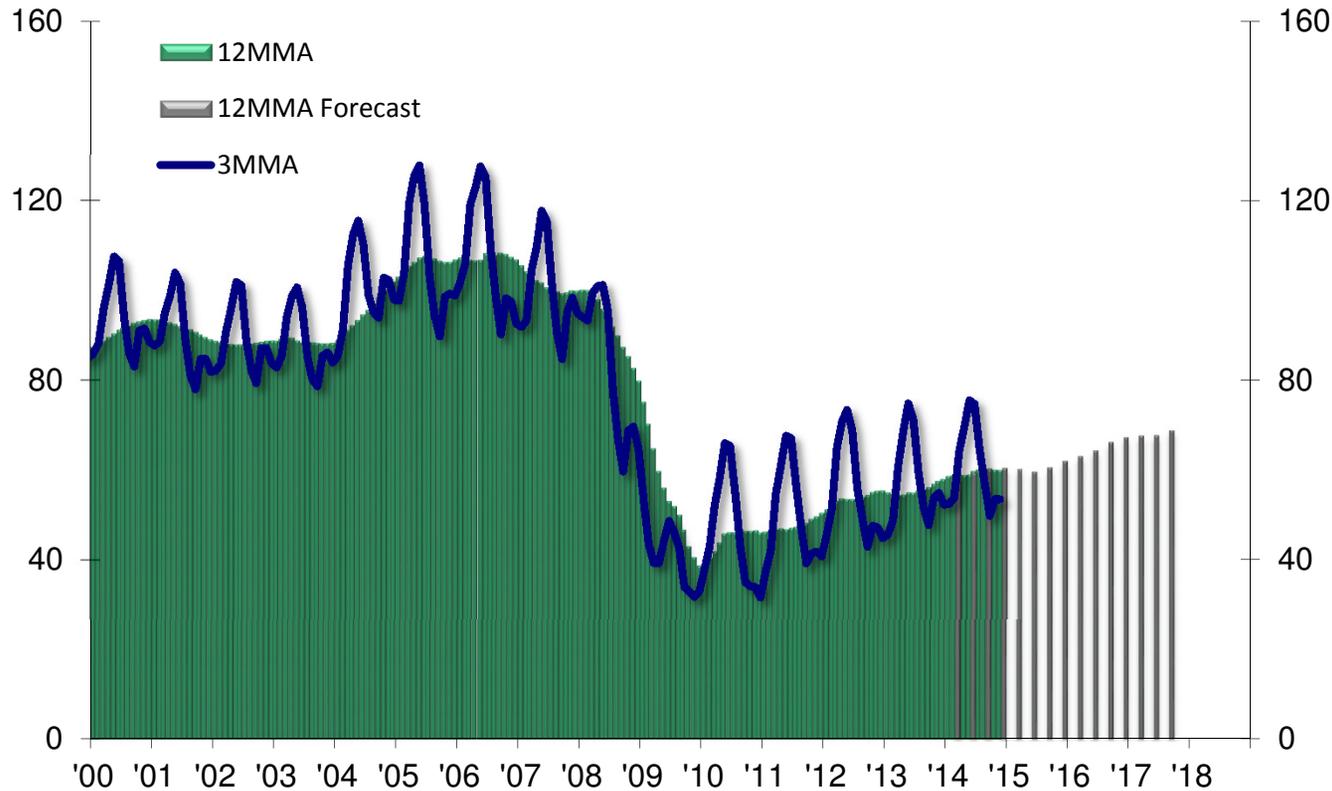
U.S. CITY RETAIL GAS PRICES



BOAT BUILDING PRODUCTION INDEX

3MMA

12MMA



QUARTERLY PRODUCTION (3MMA)

53.6

ANNUAL PRODUCTION (12MMA)

60.0

OUTLOOK

Annual Boat Building Production will remain relatively flat through mid-2015. Rise will return and steadily persist through the majority of 2017

MANAGEMENT NOTE

Use this period of softer production to develop and implement methods to streamline production.

	Dec-14	Mar-15	Jun-15	Sep-15	Dec-15	Mar-16	Jun-16	Sep-16	Dec-16	Mar-17	Jun-17	Sep-17
<i>Lower Forecast Range</i>	59.2	59.0	58.3	59.2	60.6	61.7	63.2	64.7	65.8	66.4	66.4	67.4
Annual Production (12MMA)	60.4	60.2	59.5	60.5	61.9	63.0	64.3	66.1	67.2	67.6	67.7	68.7
<i>Upper Forecast Range</i>	61.6	61.3	60.7	61.8	63.1	64.2	65.5	67.4	68.5	68.8	69.0	70.1

TWO RISKS

WEATHER
WEATHER



ADVOCACY



May 11-13
Washington, D.C.
38 Co-Hosts

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

DISCOVER BOATING

- Other industry segments are spreading the word
- More engagement from more sectors
- Together, we reach more than any one company could do alone





2014 Marketing Campaign Results

34% More Awareness

Advertising, social media & PR piqued interest in boating



1+ billion impressions in 2014



38% More Traffic
to DiscoverBoating.com/ca

These awareness efforts helped increase the number of people who visited the U.S. & Canadian sites

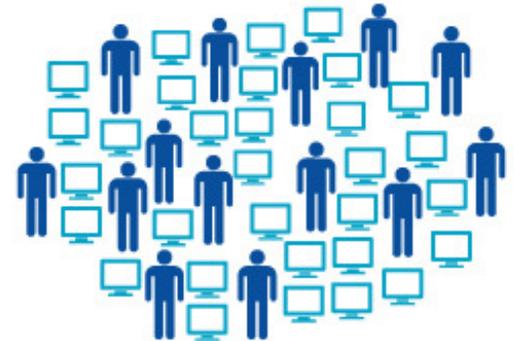


3.4 million visits to DiscoverBoating.com/ca

83% More Shoppers
from DiscoverBoating.com/ca

With more awareness and site traffic, Discover Boating increased the number of people it sent to manufacturer websites to shop

1.8 million visits to manufacturer sites from Discover Boating



Visit GrowBoating.org for industry information & resources

MIAMI 2015



PROGRESSIVE

Miami International Boat Show

February 12–16, 2015 | Miami Beach Convention Center | Sea Isle Marina | Miamarina at Bayside Marketplace



MIAMI 2016



MIAMI 2016



MIAMI 2016

- Sales Center on the 3rd floor Convention Center skywalk
- Book downtown Miami hotels with onPeak
- Media Center in A101/102

