National Marine Manufacturers Association

CENTER OF KNOWLEDGE

2014 RECREATIONAL BOATING Statistical Abstract

$1,800

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.

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EXECUTIVE SUMMARY

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's 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.
- **Annual retail sales of new boats, engines & marine accessories** in the U.S. totaled $16.4 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**.

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METHODOLOGY

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.

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

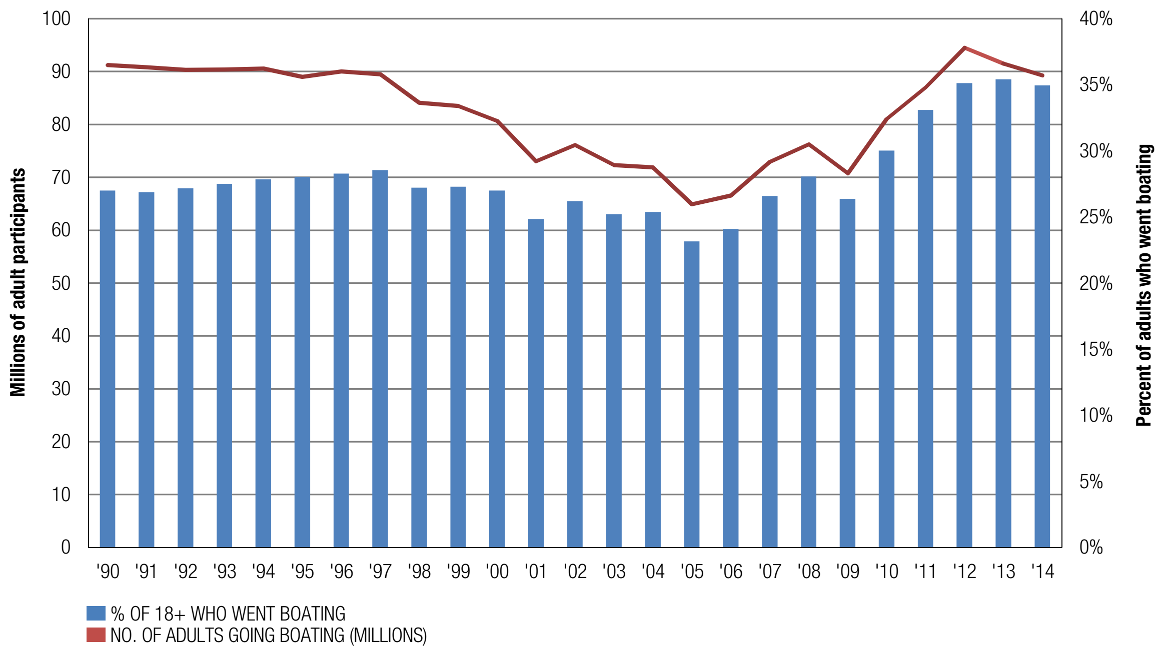
Of the 242.5 million adults living in the United States in 2014, 35.7% or 87.3 million people participated in recreational boating at least once during the year, relatively unchanged from 2013. Since 2011, boating participation has ranged from 34.8% to 37.8% of the population.

SOURCE: FORESIGHT RESEARCH/NMMA/RMRC

TABLE 1.1 Adults 18+ who participate in recreational boating

YEAR	NO. OF ADULTS GOING BOATING (MILLIONS)	% OF 18+ WHO WENT BOATING
1990	67.4	36.5%
1991	67.2	36.3%
1992	67.9	36.1%
1993	68.7	36.2%
1994	69.6	36.2%
1995	70.0	35.6%
1996	70.7	36.0%
1997	71.3	35.8%
1998	68.0	33.6%
1999	68.2	33.4%
2000	67.5	32.3%
2001	62.1	29.2%
2002	65.5	30.4%
2003	63.0	28.9%
2004	63.4	28.8%
2005	57.9	26.0%
2006	60.2	26.6%
2007	66.4	29.2%
2008	70.1	30.5%
2009	65.9	28.3%
2010	75.0	32.4%
2011	82.7	34.8%
2012	87.8	37.8%
2013	88.5	36.6%
2014	**87.3**	**35.7%**

CHART 1.1 Adults 18+ who participate in recreational boating



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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, 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

STATE	RANK	NEW POWERBOATS	OUTBOARD ENGINES	BOAT TRAILERS	AFTERMARKET ACCESSORIES	2014 TOTAL EXPENDITURES	% CHANGE	2013 TOTAL EXPENDITURES	2012 TOTAL EXPENDITURES	2011 TOTAL EXPENDITURES
AL	11	$194,380,403	$67,853,890	$9,292,452	$186,202,999	**$457,729,744**	19.6%	$382,797,246	$415,536,981	$342,781,731
AK	34	$84,111,297	$46,231,410	$1,249,098	$27,213,011	**$158,804,817**	13.8%	$139,486,566	$130,035,786	$134,654,670
AZ	37	$63,801,276	$14,158,272	$2,542,856	$51,925,415	**$132,427,819**	29.8%	$102,020,712	$87,034,245	$80,814,207
AR	22	$106,369,661	$53,626,912	$5,981,770	$118,947,681	**$284,926,024**	12.8%	$252,573,016	$276,312,058	$197,093,427
CA	8	$278,495,427	$88,318,804	$8,419,455	$171,540,789	**$546,774,476**	20.9%	$452,107,454	$376,248,321	$309,723,300
CO	39	$56,069,710	$14,464,709	$2,661,500	$38,322,597	**$111,518,517**	22.4%	$91,102,363	$87,396,992	$75,080,872
CT	36	$78,839,501	$15,752,645	$2,426,969	$39,263,088	**$136,282,202**	9.5%	$124,449,676	$126,925,529	$117,679,328
DE	9	$470,272,572	$11,077,466	$2,235,332	$60,154,658	**$543,740,027**	-8.7%	$595,527,915	$562,216,049	$457,680,756
DC	51	$1,239,986	$1,151,441	$22,585	$179,601	**$2,593,613**	-23.2%	$3,378,035	$6,095,078	$3,932,212
FL	1	$1,278,164,318	$345,493,718	$33,478,965	$660,944,783	**$2,318,081,783**	22.5%	$1,892,693,930	$1,759,164,196	$1,447,364,165
GA	12	$196,347,754	$68,093,963	$8,759,954	$175,280,946	**$448,482,618**	11.4%	$402,704,324	$374,374,522	$332,623,769
HI	49	$10,721,142	$9,914,683	$281,478	$6,144,247	**$27,061,549**	-0.2%	$27,120,580	$25,583,945	$24,036,275
ID	33	$109,535,575	$15,152,812	$1,897,170	$39,424,551	**$166,010,109**	21.1%	$137,051,946	$123,531,282	$102,097,214
IL	18	$143,762,424	$63,683,607	$6,054,392	$121,411,319	**$334,911,742**	4.8%	$319,523,935	$323,861,730	$261,912,714
IN	25	$91,454,435	$42,666,259	$4,747,206	$94,351,899	**$233,219,799**	2.0%	$228,640,402	$232,340,713	$186,588,909
IA	30	$72,468,342	$28,637,842	$3,494,042	$70,870,231	**$175,470,457**	-1.5%	$178,201,471	$181,942,206	$141,289,536
KS	43	$34,183,623	$11,606,749	$1,315,085	$26,710,515	**$73,815,973**	28.3%	$57,536,246	$67,297,712	$58,228,022
KY	29	$70,085,203	$30,843,830	$3,706,028	$73,920,984	**$178,556,046**	6.5%	$167,657,347	$175,280,132	$142,990,713
LA	10	$194,860,695	$112,892,479	$13,390,891	$208,725,394	**$529,869,459**	11.0%	$477,416,525	$513,548,028	$456,713,515
ME	32	$93,753,315	$19,331,435	$2,530,728	$51,805,674	**$167,421,152**	12.2%	$149,220,515	$156,566,867	$119,848,975
MD	23	$152,924,491	$38,783,225	$4,068,691	$73,785,375	**$269,561,782**	18.0%	$228,426,444	$247,662,597	$209,841,658
MA	26	$126,193,467	$37,525,575	$4,641,990	$55,809,229	**$224,170,262**	3.4%	$216,852,987	$209,712,026	$175,976,649
MI	3	$322,092,668	$116,007,481	$15,319,978	$308,971,602	**$762,391,729**	13.1%	$674,152,559	$645,183,993	$460,522,408
MN	4	$211,915,394	$120,606,124	$12,874,998	$256,085,166	**$601,481,682**	3.9%	$578,683,620	$560,574,704	$423,793,735
MS	27	$74,634,111	$36,513,034	$4,819,192	$75,927,415	**$191,893,751**	17.4%	$163,515,453	$176,328,914	$138,790,013
MO	16	$147,747,450	$51,519,843	$7,027,100	$143,518,514	**$349,812,907**	6.4%	$328,749,547	$339,999,567	$274,533,497
MT	38	$71,050,688	$15,170,452	$2,076,040	$39,663,941	**$127,961,122**	15.5%	$110,772,155	$95,654,197	$69,033,078
NE	42	$36,834,378	$14,183,275	$1,853,351	$36,867,230	**$89,738,234**	1.7%	$88,281,071	$89,505,683	$71,416,012
NV	46	$29,349,729	$6,139,546	$887,831	$18,385,875	**$54,762,981**	31.8%	$41,539,259	$46,601,907	$40,041,674
NH	31	$97,015,766	$7,948,381	$3,192,774	$65,220,944	**$173,377,865**	16.9%	$148,301,929	$139,368,492	$108,042,517
NJ	20	$159,619,096	$28,423,559	$4,909,530	$99,835,402	**$292,787,586**	14.5%	$255,815,251	$260,856,406	$240,989,328
NM	50	$9,841,848	$3,321,243	$504,445	$10,002,874	**$23,670,410**	18.9%	$19,902,133	$24,435,959	$25,729,426
NY	5	$302,072,018	$85,228,551	$9,665,403	$200,808,425	**$597,774,397**	7.3%	$557,305,785	$541,746,784	$458,282,011
NC	6	$280,319,402	$84,600,609	$10,397,572	$204,883,163	**$580,200,746**	16.9%	$496,404,167	$502,689,782	$422,951,500
ND	35	$54,027,490	$30,567,826	$3,045,309	$60,296,327	**$147,936,951**	15.2%	$128,386,731	$124,229,538	$74,974,254
OH	19	$144,286,619	$56,531,455	$6,017,329	$121,489,675	**$328,325,078**	9.7%	$299,349,962	$308,141,757	$246,978,786
OK	24	$108,169,150	$31,509,153	$4,592,146	$93,581,199	**$237,851,648**	13.8%	$209,018,848	$224,908,671	$206,482,645
OR	28	$84,797,351	$46,502,467	$2,554,396	$52,264,712	**$186,118,927**	5.2%	$176,967,070	$149,901,402	$137,011,063
PA	21	$129,213,454	$51,020,149	$6,641,590	$103,625,936	**$290,501,129**	3.5%	$280,772,931	$296,672,065	$249,625,189
RI	44	$46,555,406	$6,921,799	$738,341	$13,612,274	**$67,827,820**	25.3%	$54,132,379	$64,557,041	$44,850,951
SC	14	$194,694,473	$76,601,467	$8,265,998	$166,164,800	**$445,726,738**	23.4%	$361,196,430	$359,764,889	$278,234,096
SD	40	$39,602,899	$16,710,810	$1,974,587	$39,230,244	**$97,518,540**	6.8%	$91,337,616	$95,576,228	$58,453,342
TN	15	$159,319,402	$54,245,142	$7,044,555	$140,902,504	**$361,511,603**	18.2%	$305,929,124	$329,605,226	$270,602,187
TX	2	$597,204,668	$171,547,193	$24,712,019	$493,429,014	**$1,286,892,895**	11.9%	$1,150,052,350	$1,218,443,182	$1,024,740,959
UT	41	$49,262,571	$9,946,274	$1,665,972	$33,429,370	**$94,304,186**	11.3%	$84,698,788	$77,893,382	$49,565,938
VT	48	$20,158,552	$2,976,050	$670,587	$12,802,157	**$36,607,345**	19.3%	$30,687,210	$31,470,846	$29,353,194
VA	17	$162,956,173	$53,623,512	$5,854,606	$118,116,428	**$340,550,719**	9.0%	$312,373,147	$317,966,307	$289,299,406
WA	13	$236,250,401	$94,614,321	$7,239,212	$109,207,603	**$447,311,536**	15.9%	$386,056,239	$327,678,729	$290,126,203
WV	45	$24,080,821	$10,495,123	$1,282,107	$22,594,829	**$58,452,879**	-6.2%	$62,335,795	$41,216,824	$56,474,538
WI	7	$211,359,300	$103,321,043	$11,737,191	$233,858,712	**$560,276,247**	2.9%	$544,556,020	$532,963,370	$395,582,632
WY	47	$18,424,781	$5,627,287	$615,271	$12,288,678	**$36,956,017**	27.5%	$28,974,506	$36,958,511	$24,984,894
TOTAL		**$7,930,890,675**	**$2,529,684,894**	**$291,378,068**	**$5,640,000,000**	**$16,391,953,637**	**12.3%**	**$14,596,737,710**	**$14,419,561,350**	**$11,840,418,093**

Sales in the state of Delaware include a disproportionate amount of large boats that are foreign owned.

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7.1 Total recreational boats in use

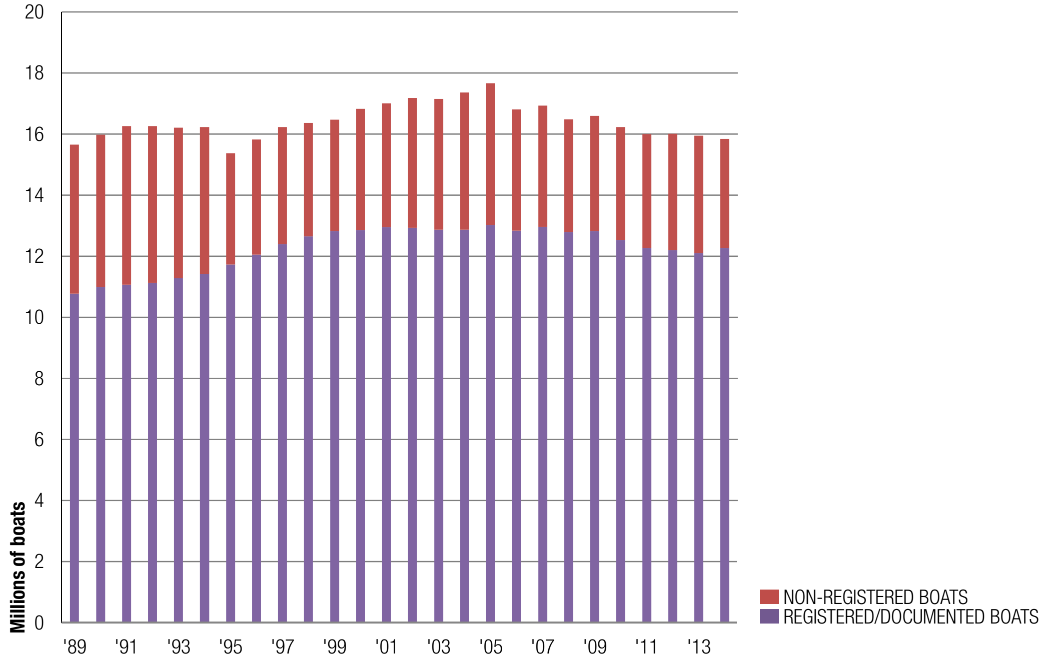
The total number of recreational boats in use during 2014 declined 0.6% to 15.8 million.

SOURCE: USCG

TABLE 7.1 Total recreational boats in use

YEAR	REGISTERED/DOCUMENTED BOATS (MILLIONS)	NON-REGISTERED BOATS (MILLIONS)	TOTAL (MILLIONS)
1989	10.8	4.9	15.7
1990	11.0	5.0	16.0
1991	11.1	5.2	16.3
1992	11.1	5.1	16.3
1993	11.3	4.9	16.2
1994	11.4	4.8	16.2
1995	11.7	3.6	15.4
1996	12.1	3.8	15.8
1997	12.4	3.8	16.2
1998	12.7	3.7	16.4
1999	12.8	3.6	16.5
2000	12.9	4.0	16.8
2001	13.0	4.0	17.0
2002	12.9	4.2	17.2
2003	12.9	4.3	17.2
2004	12.9	4.5	17.4
2005	13.0	4.6	17.7
2006	12.8	4.0	16.8
2007	13.0	4.0	16.9
2008	12.8	3.7	16.5
2009	12.8	3.8	16.6
2010	12.5	3.7	16.2
2011	12.3	3.7	16.0
2012	12.2	3.8	16.0
2013	12.1	3.8	15.9
2014 est.	**12.3**	**3.6**	**15.8**

CHART 7.1 Total recreational boats in use



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7.2 Recreational boats in use by type

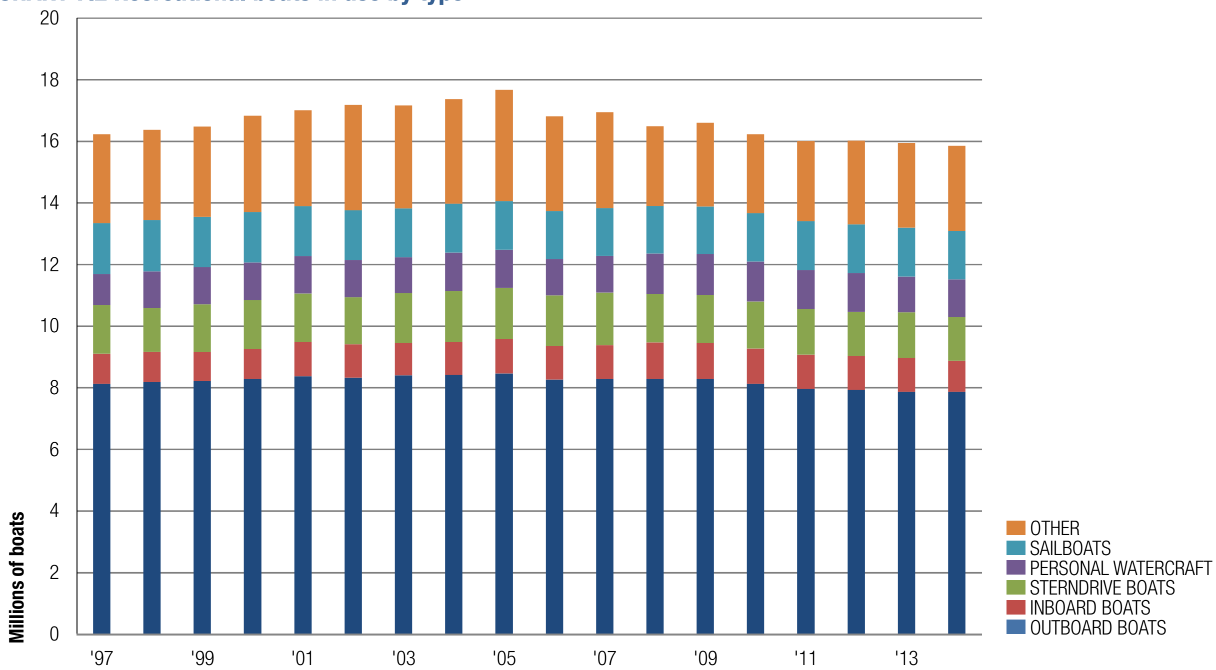
Outboard boats were the most popular for the eighteenth consecutive year. Of the 15.8 million boats on the water in 2014, 49.7% were outboard boats.

SOURCE: USCG

TABLE 7.2 Recreational boats in use by type

YEAR	OUTBOARD BOATS (MILLIONS)	INBOARD BOATS (MILLIONS)	STERNDRIVE BOATS (MILLIONS)	PERSONAL WATERCRAFT (MILLIONS)	SAILBOATS (MILLIONS)	OTHER (MILLIONS)	TOTAL (MILLIONS)
1997	8.1	1.0	1.6	1.0	1.7	2.9	16.2
1998	8.2	1.0	1.4	1.2	1.7	2.9	16.4
1999	8.2	0.9	1.6	1.2	1.6	2.9	16.5
2000	8.3	1.0	1.6	1.2	1.6	3.1	16.8
2001	8.4	1.1	1.6	1.2	1.6	3.1	17.0
2002	8.3	1.1	1.5	1.2	1.6	3.4	17.2
2003	8.4	1.1	1.6	1.2	1.6	3.3	17.2
2004	8.4	1.1	1.7	1.2	1.6	3.4	17.4
2005	8.5	1.1	1.7	1.2	1.6	3.6	17.7
2006	8.3	1.1	1.6	1.2	1.6	3.1	16.8
2007	8.3	1.1	1.7	1.2	1.6	3.1	16.9
2008	8.3	1.2	1.6	1.3	1.5	2.6	16.5
2009	8.3	1.2	1.6	1.3	1.5	2.7	16.6
2010	8.1	1.1	1.5	1.3	1.6	2.6	16.2
2011	8.0	1.1	1.5	1.3	1.6	2.6	16.0
2012	7.9	1.1	1.4	1.2	1.6	2.7	16.0
2013	7.9	1.1	1.5	1.2	1.6	2.8	15.9
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



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National Marine Manufacturers Association (NMMA)

NMMA is the leading association representing the recreational boating industry. NMMA member companies produce more than 80 percent of the marine products used by recreational boaters in the United States. NMMA provides a wide variety of programs and services tailored to member needs—technical expertise, marketing and communications, standards monitoring, government relations, industry statistics and more—and is active with world marine trade organizations to promote and protect the sport of recreational boating. NMMA also produces boat shows in key North American markets to provide quality showplaces for exhibitors and consumers.

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