National Marine Manufacturers Association

CENTER OF KNOWLEDGE

2013

RECREATIONAL BOATING

Statistical Abstract

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2013 RECREATIONAL BOATING Statistical Abstract

The *2013 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.

These partnerships form a “Center of Knowledge” for marine industry statistics and research that enables NMMA to provide the industry with timely, accurate data and analysis of the marine marketplace.

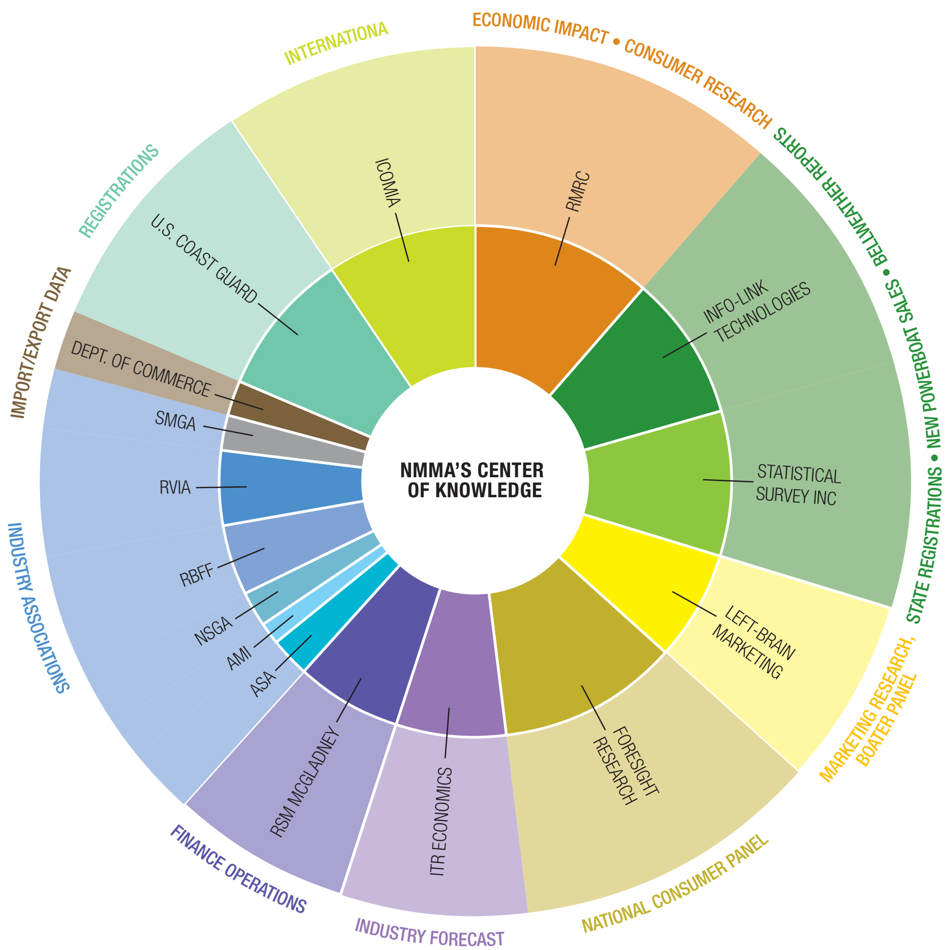
The report presents detailed data for boat registrations, sales, expenditures, participation and the retail market. Boating Population includes boating participation, ownership, usage and behavior data from boater participation and boat owner surveys conducted by Foresight Research in late 2013. The Import/Export section features an in-depth look at the import/export marketplace focusing on product categories, trade partners and regional analysis.

Section 18 details the results of a consumer survey conducted by Foresight Research in 2013 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 358.

Coalition of NMMA Resources in the “Center of Knowledge”

Mission: Bring together a coalition of resources for marine industry statistics and research to provide industry stakeholders, the press and the general public with current, valid and reliable information on the recreational boating industry.



EXECUTIVE SUMMARY

Industry Snapshot

Recreational boating continues to be an important factor to the U.S. economy contributing $36.7 billion in direct sales of products and services in 2013 a three percent increase compared to 2012. This is the third year of growth since the industry's low point of the great recession in 2010 when sales of products and services totaled $30.4 billion. The industry's high mark was set in 2006 at $39.5 billion.

New and pre-owned boat and engine retail sales totaled $21.9 billion in 2013, a six percent increase compared to the 2012. The high point for total sales was set in 2006 at $27.6 billion and the low mark was set in 2011 at $18.4 billion.

Retail sales of new boats and engines in 2013 totaled $9.8 billion a five-year high and a 10 percent increase compared to 2012. Sales of new traditional powerboats (outboard, inboard, sterndrive and jet boats) grew 12 percent in 2013 to $6.5 billion. The high point of traditional powerboat sales was set in 2006 at $9.7 billion and the low point was set in 2010 at $5.0 billion.

Retail sales of new outboard engines reached a six-year high in 2013 and totaled $2.2 billion—a seven percent increase compared to 2012. The high point for new outboard engine sales was set in 2006 at $3.3 billion and the low point was set in 2009 at $1.7 billion.

Pre-owned power and sailboat sales in 2013 totaled $10.1 billion a three percent increase from 2012. This is the highest total since 2006 before the great recession when sales totaled $10.5 billion. Sales of pre-owned outboard engines reached an all-time high $2.0 billion in 2013 a five percent increase compared to the previous year.

Of the 242 million adults living in the United States in 2013, 89 million people participated in recreational boating at least once during the year—a one percent increase from 2012. This is the highest level of participation in recreational boating since NMMA began collecting participation data in 1990.

There were 960 thousand traditional powerboats (new and pre-owned) sold in 2013, a less than one percent decline compared to 2012. In units, new traditional powerboat sales increased two percent to 161 thousand boats and pre-owned traditional powerboat sales declined one percent to 799 thousand boats. There was a slight movement in the ratio of new to pre-owned sales for the second consecutive year in 2013, 17 percent to 83 percent, respectively; however, the ratio of new to pre-owned sales has not recovered to pre-recession levels or the industry high mark of 31 percent new to 69 percent pre-owned set in 2000.

Ninety-five percent of the new traditional powerboats sold were manufactured in the United States, a total of 152 thousand traditional powerboats. This is a two percent increase compared to 2012.

Total unit sales for all new boats (power, sail and paddle) declined three percent in 2013 to 532 thousand units. This decline was led primarily by the paddle segment which was down six percent (18 thousand units), followed by jet boats down 33 percent (1,500 units) and sterndrive boats down eight percent (1,400 units). On the bright side outboard boats were up five percent (six thousand units), inboard ski/wakeboard boats up 11 percent (600 units), inboard cruisers up 10 percent (200 units) and personal watercraft up two percent (900 units).

New outboard engine unit sales increased three percent to 198 thousand engines; the greatest number of units sold since 2008, but still 151 thousand engines below the all-time high mark set in 2000 when 349 thousand outboard engines were sold.

New boat trailer sales increased 11 percent to 86 thousand units; corresponding dollar sales totaled $148 million—a 12 percent increase compared to 2012. Unit sales in 2013 were the highest since 2008 when 92 thousand trailers were sold.

Aftermarket accessory sales total $4.9 billion in 2013, a 12 percent decline compared to the previous year. Consequently, the average spent on accessories per boat in 2013 was $309, down $43 from the previous year. More than seven of 10 (72 percent) power and sail boat owners purchased at least one aftermarket accessory product in 2013, down from the 78 percent of boat owners who made such purchases in 2012.

Boaters spent six percent more on operating costs in 2013 (fuel, repair/services, storage, insurance, taxes, and interest payments) than they did in 2012. Operating costs in 2013 totaled $9.8 billion compared to $9.3 billion in 2012. Fuel accounted for more than three of 10 operating dollars; the increase was driven primarily by a four-day jump in the number of days spent boating. The average price of a gallon of gasoline during the primary boating season (May 1st through September 30th) was $3.57 a gallon, one penny less than in 2012.

Boat owners used their boats on average 30 days during the year in 2013—four more days than the previous year. Owners of boats 30 feet and larger used their boats an average of 31 days; owners of boats smaller than 14 feet used their boats an average of 16 days and owners of boats 14 to 20 feet in length used their boats an average 24 days during the year.

Total Boat Sales (Section 5)

There were 532,170 new boats sold in 2013, a three percent decline compared to the previous year, corresponding retail value totaled $7.6 billion an increase of 11 percent from 2012. (Table 5.2)

Sales of pre-owned boats declined two percent to 955,300 units; corresponding retail value totaled $10.1 billion; a three percent increase from 2012.

More than seven of 10 power boats were sold at retail in April through September 2013, while slightly more than half were shipped to dealers in the same time period. (Table 5.4)

Total New and Pre-owned Powerboat Sales (Table 5.3)

Retail sales of both new and pre-owned traditional powerboats (outboard, inboard, sterndrive and jet boats) totaled $15.8 billion in 2013, a seven percent increase from the previous year. Total sales dollars increased for both segments; new traditional powerboats were up 12 percent and pre-owned sales dollars were up four percent.

A total of 960 thousand traditional powerboats exchanged hands in 2013, approximately 3,000 fewer boats than the prior year. New traditional powerboat retail sales totaled 161,200 a two percent increase from 2012. Pre-owned traditional powerboat sales total 798,900, one percent less than the previous year.

Estimated Average Price of Boats (Sections 3, 4, 5)

The average retail price of a new traditional powerboat in 2013 was $40,540, up nine percent compared to 2012.

The average retail price of a pre-owned traditional powerboat in 2013 was $11,585, a five percent increase from 2012.

Pre-owned power (traditional powerboats plus PWCs) and sail boats accounted for 83 percent of boats trading hands in 2013, down one percent compared to 2012. In terms of dollar value, pre-owned boats accounted for 59 percent of the total spent on power and sailboats in 2013.

Boat Owner Demographics (Section 1)

Owners of a recreational boat are middle-class Americans. Seventy-one percent of boat owners had a household income of less than $100,000 and half had a household income of less than $75,000.

Nearly three of four of current boat owners were married or living with a partner, compared to a little more than half of those who had never owned a boat.

Nearly half of current boat owners had children living at home, compared to almost a third of those who had never owned a boat.

In 2013 more than two-thirds of current boat owners were between 31 and 64 years old. Ten percent of current boat owners were Hispanic and seven percent were African-American in 2013 compared to eight percent Hispanic and six percent African-American in 2012.

Boating Participation (Section 1)

The Great Lakes region had the country's highest concentration of boaters in 2013; nearly two of 10 boating participants lived in the region.

Six of 10 boating participants were either married or living with a partner, slightly more than four of 10 participants had children living at home, and more than eight of 10 had a household income of less than $100,000.

Boat Registrations (Section 6)

Total boat registrations for 2012 were down less than one percent compared to the previous year, 12.1 million versus 12.2 million in 2011.

Florida, Minnesota, Michigan, California, and Wisconsin were the top five states for recreational boating registrations.

The top 20 states account for 75 percent of all boat registrations.

More than nine of 10 registered boats were less than 26 feet long; four of 10 were less than 16 feet in length and slightly more than five in 10 were between 16 feet and 25 feet in length.

Outboard boats accounted for 66 percent of all mechanically propelled boats. More than five in 10 registered mechanically propelled boats had fiberglass hull and nearly four in 10 had aluminum hulls.

New Product Sales (Section 5)

Expenditures for new power boats, outboard engines, boat trailers and aftermarket accessories totaled $14.3 billion in 2013, a two percent increase from the previous year.

Florida again led all states in total expenditures for new marine products; boat owners in Florida spent nearly $2.0 billion, up 14 percent from the previous year.

Expenditures in the top 20 states accounted for 74 percent of the total spent on new powerboats, outboard engines, trailers and accessories in 2013.

Expenditures for the top 20 states as a group increased three percent; spending in California, Georgia, Delaware and Washington grew by double digits in 2013 compared to the previous year.

Total spending in Ohio, Illinois, Pennsylvania, Tennessee and Louisiana declined in 2013 compared to the previous year. New Jersey moved back into the top 20 while Virginia dropped out.

Aftermarket accessory sales totaled $4.9 billion in 2013, down 12 percent compared to the previous year. Spending per boat for the year averaged $309 compared to $352 in 2012.

Imports and Exports (Section 7)

The U.S. exported $1.64 billion worth of recreational boats in 2013, down eight percent from the prior year. By market segment, exports of outboard boats, inboard boats, sailboats, and inflatable boats, up six percent, seven percent, two percent and two percent, respectively, offset declines in exports of rowboats/canoes, and "other" boats, down five percent and 24 percent, respectively. Sterndrive boat exports were essentially flat, down less than one percent. The number of recreational boats exported in 2013 decreased six percent to a total of 123,200 units.

In 2013, the U.S. exported 32,507 traditional powerboats (down 10 percent compared to 2012) with a value of $1 billion (up five percent compared to 2012).

The U.S. exported $492 million worth of marine engines in 2013, up five percent from the prior year. The number of marine engines exported increased to a six year high 100,300 units. Outboard engines dominated the marine engine export market in 2013; more than four out of five marine engine exports were outboard engines, followed by sterndrive, inboard and hydro-jet engines.

Recreational boat imports reached a five-year high $1.1 billion in 2013. By market segment, sterndrive boat imports were relatively unchanged, rowboats/canoes were down six percent while imports in all other segments grew; outboard boat imports jumped 82 percent, inflatable boats were up 18 percent, inboard boats rose nine percent, sailboats were up four percent, and "other" boats climbed two percent.

Boat imports totaled 288,800 in 2013, the second highest total on record. Canoes accounted for nearly four out of five boat imports. Traditional powerboats contributed 8,700 units to the 2013 import total.

The U.S. imported $993 million worth of marine engines in 2013, a 10 percent increase from 2012; outboard engines accounted for $722 million, or 73 percent, of U.S. marine engine imports. In terms of volume, recreational marine engines imports totaled 385,800 units in 2013, relatively unchanged from the prior year.

Canada, Latin America, and Western Europe, were the top three destinations for recreational boat and marine engine exports in 2013 accounting of seven of 10 export dollars.

Boating and the Economy (Section 2)

The recreational vehicle market grew 19 percent in 2013 to 248,000 units—a six-year high.

On a rolling 12-month basis, the rate of change in light vehicle sales ended the year up 17 percent, compared to traditional powerboat retail sales which grew two percent.

Consumer confidence averaged 73.2 in 2013, ending the year at 77.5. While confidence has improved steadily since the recession (average readings for 2012: 67.1, 2011: 58.1, 2010: 54.6, 2009: 45.2), consumer confidence remains relatively mediocre, far from the reports of sentiments in the 100+ range prior to the recession.

Fishing license sales declined five percent in 2013 to 28 million after growing for five consecutive years (Source: U.S. Fish and Wildlife Service).

Fishing tackle sales grew for the third consecutive year, up seven percent to $2.26 billion in 2013 (Source: NSGA).

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Boating Population

1.1 Participation

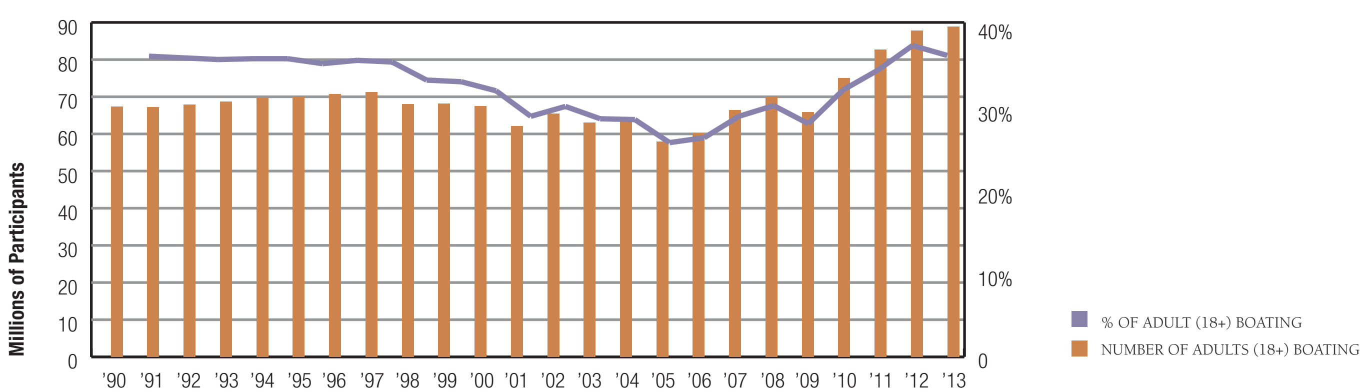
Of the 241.9 million adults living in the United States in 2013, 36.6% or 88.5 million participated in recreational boating at least once during the year, a 0.8% increase from 2012. This is the largest number of the U.S. adult population participating in recreational boating since NMMA began collecting participation data in 1990.

SOURCE: RMRC/FORESIGHT RESEARCH/NMMA

Table 1.1

YEAR	ADULTS (18+) BOATING (MILLIONS)	ADULTS (18+) 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%**

CHART 1.1



1.2 Total recreational boats in use

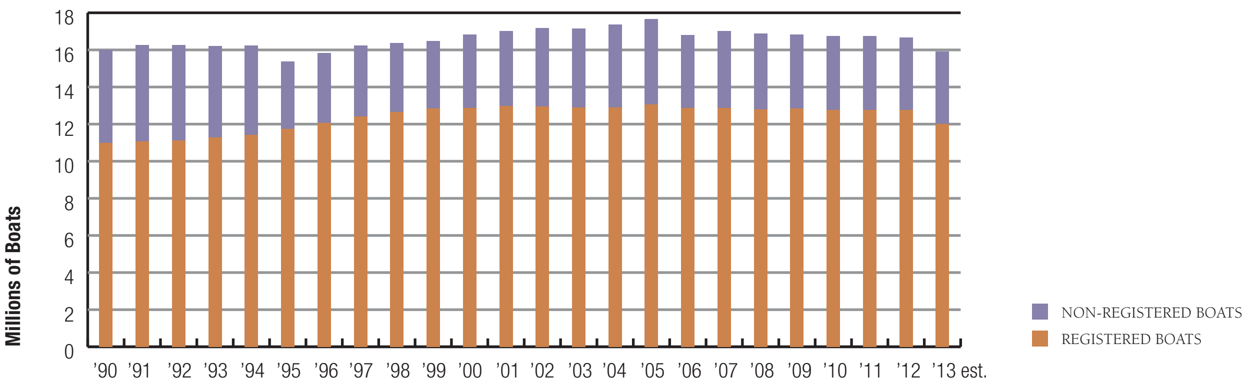
The total number of recreational boats in use during 2013 declined 0.6 % compared to the previous year. It is estimated that there were 15.91 million boats in use during 2013, compared to 16.01 million in 2012.

SOURCE: USCG/NMMA

Table 1.2

YEAR	REGISTERED BOATS/DOCUMENTED (MILLIONS)	NON-REGISTERED BOATS (MILLIONS)	TOTAL (MILLIONS)
1989	10.78	4.88	15.66
1990	11.00	4.99	15.99
1991	11.07	5.19	16.26
1992	11.13	5.13	16.26
1993	11.28	4.93	16.21
1994	11.43	4.81	16.24
1995	11.74	3.64	15.38
1996	12.06	3.77	15.83
1997	12.41	3.83	16.23
1998	12.67	3.70	16.37
1999	12.84	3.64	16.48
2000	12.89	3.94	16.83
2001	12.99	4.01	17.00
2002	12.97	4.21	17.18
2003	12.91	4.25	17.16
2004	12.90	4.47	17.37
2005	13.06	4.61	17.67
2006	12.87	3.94	16.81
2007	13.00	4.14	16.94
2008	12.80	4.00	16.80
2009	12.83	4.00	16.82
2010	12.54	3.81	16.35
2011	12.27	3.89	16.16
2012	12.20	3.81	16.01
2013 est.	**12.01**	**3.89**	**15.91**

CHART 1.2



1.3 Recreational boats in use by type

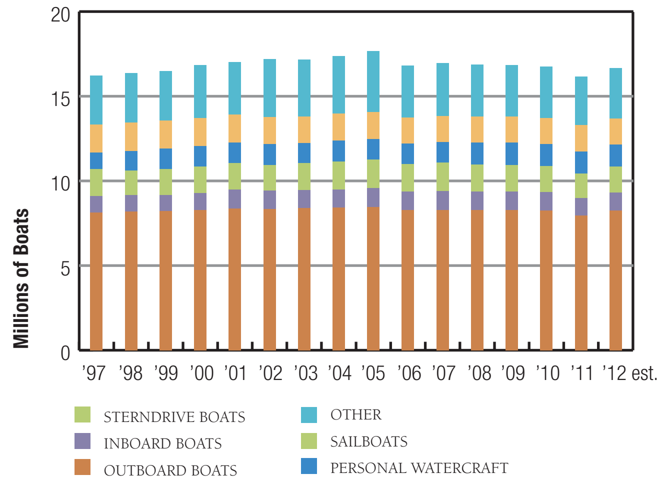
Outboards were the most popular type of recreational boat in use for the seventeenth consecutive year; of the 115.91 million boats on the water in 2013, half (50%) were outboard boats.

SOURCE: USCG/NMMA

Table 1.3

YEAR	OUTBOARD BOATS (MILLIONS)	INBOARD BOATS (MILLIONS)	STERNDRIVE BOATS (MILLIONS)	PERSONAL WATERCRAFT (MILLIONS)	SAILBOATS (MILLIONS)	OTHER (MILLIONS)	TOTAL (MILLIONS)
1997	8.13	0.98	1.58	1.00	1.65	2.89	16.23
1998	8.18	0.99	1.42	1.18	1.67	2.93	16.37
1999	8.22	0.94	1.55	1.20	1.65	2.93	16.48
2000	8.29	0.98	1.57	1.23	1.64	3.13	16.83
2001	8.37	1.12	1.56	1.22	1.63	3.11	17.00
2002	8.33	1.09	1.52	1.22	1.61	3.42	17.18
2003	8.40	1.06	1.60	1.17	1.58	3.35	17.16
2004	8.42	1.06	1.66	1.25	1.58	3.40	17.37
2005	8.47	1.10	1.68	1.23	1.57	3.62	17.67
2006	8.27	1.09	1.64	1.19	1.56	3.07	16.81
2007	8.28	1.10	1.71	1.19	1.55	3.11	16.94
2008	8.29	1.09	1.57	1.24	1.54	2.58	16.48
2009	8.29	1.08	1.56	1.33	1.54	2.72	16.60
2010	8.13	1.05	1.52	1.27	1.57	2.57	16.23
2011	7.96	1.01	1.47	1.27	1.59	2.60	16.00
2012	7.93	1.10	1.43	1.25	1.58	2.72	16.01
2013 est.	**7.89**	**1.06**	**1.44**	**1.27**	**1.50**	**2.68**	**15.91**

CHART 1.3



1.4 Boats retired from fleet

Analysis of the *2011 U.S. Boat Registrations* report indicates that an estimated 426,000 boats were retired from the fleet in 2011; of these, 62% were outboard boats.

SOURCE: NMMA

YEAR	TOTAL BOATS	OUTBOARD BOATS	INBOARD/ PWC	STERNDRIVE BOATS	SAILBOATS
1998	358,088	156,888	103,500	61,700	36,000
1999	400,818	192,128	105,790	60,000	42,900
2000	356,835	172,984	97,006	54,490	32,355
2001	360,430	138,195	107,100	82,780	32,355
2002	443,812	251,650	110,211	64,551	17,400
2003	293,649	129,137	100,052	45,500	18,960
2004	363,723	205,117	90,732	46,304	21,570
2005	313,467	163,339	71,549	56,649	21,930
2006	683,896	391,179	160,039	109,548	23,130
2007	298,871	158,441	96,910	27,500	16,020
2008	412,446	161,917	112,981	124,426	13,122
2009	218,727	115,627	49,016	41,859	12,225
2010	436,715	267,284	102,275	55,816	11,340
2011	426,580	245,249	104,332	65,839	11,160
2012	297,455	159,757	80,218	51,941	5,539
2013 projected	**334,878**	**177,500**	**71,942**	**74,000**	**11,436**
2014 projected	292,252	145,500	72,092	66,500	8,160
2015 projected	238,532	113,500	70,172	48,500	6,360
2016 projected	205,222	97,500	68,612	36,500	2,610
2017 projected	205,337	96,000	68,657	37,500	3,180
2018 projected	212,295	102,500	68,725	37,500	3,570
2019 projected	224,262	110,000	65,672	45,000	3,900
2020 projected	232,262	115,500	65,672	46,800	4,290

Changes in annual registrations are used in developing estimates of powerboats retired from the fleet. The formula for estimating the number of boats retired from the fleet is (Previous Year's plus Current Year's Sales minus Current Year's Registrations). For projections, industry experts assume a 50% attrition rate for boats older than 25 years.

3.1 New boats: Retail market data

New boat sales declined 2.6% in 2013 compared to 2012, falling to 532,170 units, while the corresponding retail value was up 11% to $7.6 billion. The drop in unit sales was fueled primarily by the paddle sport category (canoes/kayaks); unit sales of canoes/kayaks declined 6% in 2013.

New outboard engine sales increased 3% to 198,100 units in 2013 compared to 2012, the largest total since 2008; corresponding retail value increased 7% to $2.2 billion.

Sales of new boat trailers increased 11% to 85,800 units in 2013 compared to 2012, with a corresponding retail value of $148 million.

Total new boat, engine and trailer sales dollars were up 10% to $9.9 billion in 2013 compared to 2012.

SOURCE: NMMA

TABLE 3.1

		2002	2003	2004	2005	2006	2007	2008
Outboard Boats	Total Units Sold	212,000	207,100	216,600	213,300	204,200	188,700	151,400
	Retail Value (Billions of Dollars)	$2.437	$2.743	$2.868	$3.201	$3.216	$3.359	$2.803
	Average Unit Cost	$11,495	$13,244	$13,239	$15,006	$15,748	$17,798	$18,513
Outboard Engines	Total Units Sold	302,100	305,400	315,300	312,000	301,700	275,500	227,000
	Retail Value (Billions of Dollars)	$2.479	$2.555	$2.879	$3.155	$3.255	$2.689	$2.071
	Average Unit Cost	$8,205	$8,365	$9,131	$10,112	$10,790	$9,761	$9,125
Boat Trailers	Total Units Sold	141,200	130,600	133,400	134,100	130,900	126,200	92,400
	Retail Value (Billions of Dollars)	$0.201	$0.202	$0.228	$0.248	$0.296	$0.232	$0.162
	Average Unit Cost	$1,421	$1,547	$1,709	$1,846	$2,260	$1,839	$1,750
Inboard Boats—	Total Units Sold	10,500	11,100	11,600	12,600	13,100	12,000	8,900
Ski/Wakeboard Boats	Retail Value (Billions of Dollars)	$0.399	$0.403	$0.435	$0.508	$0.568	$0.567	$0.449
	Average Unit Cost	$37,982	$36,332	$37,533	$40,297	$43,386	$47,234	$50,400
Inboard Boats—Cruisers	Total Units Sold	11,800	8,100	8,600	7,800	6,900	6,200	4,200
	Retail Value (Billions of Dollars)	$4.337	$3.020	$3.335	$3.119	$3.070	$2.888	$2.548
	Average Unit Cost	$367,505	$372,830	$387,771	$399,815	$444,872	$465,826	$606,621
Sterndrive Boats	Total Units Sold	69,300	69,200	71,100	72,300	67,700	60,400	38,500
	Retail Value (Billions of Dollars)	$2.192	$2.221	$2.368	$2.573	$2.724	$2.672	$1.789
	Average Unit Cost	$31,634	$32,097	$33,306	$35,592	$40,237	$44,238	$46,459
Canoes	Total Units Sold	100,000	86,700	93,900	77,200	99,900	99,600	73,700
	Retail Value (Billions of Dollars)	$0.057	$0.050	$0.057	$0.048	$0.058	$0.055	$0.040
	Average Unit Cost	$569	$573	$605	$627	$585	$553	$547
Kayaks	Total Units Sold	340,300	324,000	337,300	349,400	393,400	346,600	322,700
	Retail Value (Billions of Dollars)	$0.158	$0.151	$0.160	$0.167	$0.196	$0.184	$0.171
	Average Unit Cost	$463	$466	$473	$478	$497	$531	$531
Inflatables	Total Units Sold	—	30,500	31,600	30,100	25,100	29,400	28,300
	Retail Value (Billions of Dollars)	—	$0.067	$0.065	$0.058	$0.048	$0.118	$0.084
	Average Unit Cost	—	$2,211	$2,047	$1,912	$1,921	$4,012	$2,952
Personal Watercraft	Total Units Sold	79,300	80,600	79,500	80,200	82,200	79,900	62,600
	Retail Value (Billions of Dollars)	$0.698	$0.717	$0.733	$0.762	$0.792	$0.793	$0.670
	Average Unit Cost	$8,798	$8,890	$9,226	$9,495	$9,636	$9,931	$10,703
Jet Boats	Total Units Sold	5,100	5,600	5,600	6,700	6,200	6,800	4,900
	Retail Value (Billions of Dollars)	$0.108	$0.115	$0.130	$0.168	$0.152	$0.189	$0.138
	Average Unit Cost	$21,176	$20,584	$23,280	$25,108	$24,443	$27,784	$28,088
Houseboats**	Total Units Sold	—	—	550	450	530	420	320
	Retail Value (Billions of Dollars)	—	—	—	$0.324	$0.415	$0.197	$0.150
	Average Unit Cost	—	—	—	$720,210	$783,912	$470,093	$470,093
Sailboats*	Total Units Sold	15,800	15,000	14,300	14,400	12,900	11,800	9,300
	Retail Value (Billions of Dollars)	$0.568	$0.540	$0.603	$0.647	$0.652	$0.716	$0.448
	Average Unit Cost	$35,936	$35,983	$42,195	$44,926	$50,557	$60,708	$48,157
TOTAL NEW BOAT SALES	**UNITS**	**844,100**	**837,900**	**870,650**	**864,450**	**912,130**	**841,820**	**704,820**
	TOTAL DOLLARS (BILLIONS)	**$10.952**	**$10.027**	**$10.754**	**$11.574**	**$11.891**	**$11.739**	**$9.289**
	PERCENT CHANGE UNITS	**-4.1%**	**-0.7%**	**3.9%**	**-0.7%**	**5.5%**	**-7.7%**	**-16.3%**
	PERCENT CHANGE DOLLARS	**7.7%**	**-8.5%**	**7.3%**	**7.6%**	**2.7%**	**-1.3%**	**-20.9%**

*Source: The Sailing Company's Annual Sailing Business Review
**Previously reported in the individual power categories

TABLE 3.1 Continued

		2009	2010	2011	2012	2013	% CHANGE
Outboard Boats	Total Units Sold	117,500	112,800	115,750	128,800	**134,800**	4.7%
	Retail Value (Billions of Dollars)	$2.157	$1.863	$2.126	$2.626	**$2.961**	12.8%
	Average Unit Cost	$18,356	$16,517	$18,369	$20,387	**$21,964**	7.7%
Outboard Engines	Total Units Sold	180,700	178,900	178,500	193,200	**198,100**	2.5%
	Retail Value (Billions of Dollars)	$1.659	$1.722	$1.794	$2.057	**$2.211**	7.4%
	Average Unit Cost	$9,178	$9,624	$10,052	$10,649	**$11,159**	4.8%
Boat Trailers	Total Units Sold	56,900	65,100	76,200	77,400	**85,800**	10.9%
	Retail Value (Billions of Dollars)	$0.088	$0.102	$0.122	$0.133	**$0.148**	11.8%
	Average Unit Cost	$1,555	$1,569	$1,603	$1,714	**$1,729**	0.9%
Inboard Boats—	Total Units Sold	6,500	5,000	4,850	5,500	**6,100**	10.9%
Ski/Wakeboard Boats	Retail Value (Billions of Dollars)	$0.348	$0.287	$0.297	$0.375	**$0.470**	25.1%
	Average Unit Cost	$53,516	$57,422	$61,300	$68,269	**$77,032**	12.8%
Inboard Boats—Cruisers	Total Units Sold	3,000	2,330	2,040	2,000	**2,200**	10.0%
	Retail Value (Billions of Dollars)	$1.921	$1.750	$1.726	$1.798	**$2.098**	16.7%
	Average Unit Cost	$640,418	$750,917	$845,869	$898,795	**$953,539**	6.1%
Sterndrive Boats	Total Units Sold	26,550	18,700	16,890	16,500	**15,100**	-8.5%
	Retail Value (Billions of Dollars)	$1.244	$0.914	$0.855	$0.883	**$0.895**	1.4%
	Average Unit Cost	$46,858	$48,882	$50,615	$53,516	**$59,290**	10.8%
Canoes	Total Units Sold	89,600	77,100	77,800	78,600	**74,100**	-5.7%
	Retail Value (Billions of Dollars)	$0.043	$0.037	$0.037	$0.039	**$0.037**	-5.9%
	Average Unit Cost	$482	$482	$482	$496	**$495**	-0.2%
Kayaks	Total Units Sold	254,000	228,000	234,800	239,500	**225,800**	-5.7%
	Retail Value (Billions of Dollars)	$0.147	$0.132	$0.124	$0.130	**$0.122**	-6.1%
	Average Unit Cost	$578	$578	$526	$542	**$540**	-0.4%
Inflatables	Total Units Sold	21,700	24,300	24,000	26,500	**26,000**	-1.9%
	Retail Value (Billions of Dollars)	$0.084	$0.067	$0.065	$0.073	**$0.086**	18.5%
	Average Unit Cost	$3,868	$2,740	$2,714	$2,744	**$3,314**	20.8%
Personal Watercraft	Total Units Sold	44,500	41,600	42,900	38,500	**39,400**	2.3%
	Retail Value (Billions of Dollars)	$0.500	$0.463	$0.501	$0.472	**$0.481**	2.0%
	Average Unit Cost	$11,242	$11,123	$11,668	$12,251	**$12,217**	-0.3%
Jet Boats	Total Units Sold	3,550	3,500	3,300	4,500	**3,000**	-33.3%
	Retail Value (Billions of Dollars)	$0.106	$0.115	$0.112	$0.160	**$0.113**	-29.5%
	Average Unit Cost	$29,774	$32,752	$34,082	$35,589	**$37,618**	5.7%
Houseboats**	Total Units Sold	220	115	75	50	**70**	40.0%
	Retail Value (Billions of Dollars)	$0.099	$0.051	$0.036	$0.026	**$0.032**	22.3%
	Average Unit Cost	$452,264	$441,954	$485,029	$525,594	**$459,047**	-12.7%
Sailboats*	Total Units Sold	5,400	4,300	4,600	5,945	**5,600**	-5.8%
	Retail Value (Billions of Dollars)	$0.197	$0.179	$0.179	$0.217	**$0.256**	17.7%
	Average Unit Cost	$36,503	$41,717	$38,889	$36,540	**$45,639**	24.9%
TOTAL NEW BOAT SALES	**UNITS**	**572,520**	**517,745**	**527,005**	**546,395**	**532,170**	**-2.6%**
	TOTAL DOLLARS (BILLIONS)	**$6.847**	**$5.857**	**$6.058**	**$6.799**	**$7.550**	**11.1%**
	PERCENT CHANGE UNITS	**-18.8%**	**-9.6%**	**1.8%**	**3.7%**	**-2.6%**	
	PERCENT CHANGE DOLLARS	**-26.3%**	**-14.5%**	**3.4%**	**12.2%**	**11.1%**	

*Source: The Sailing Company's Annual Sailing Business Review
**Previously reported in the individual power categories

3.1.1 Traditional powerboat market

Sales of traditional powerboats (outboard, sterndrive, inboard, and jet boats) were up 2% in 2013, reaching a total of 161,200 units, compared to 157,300 in 2012.

Total dollar sales for the traditional powerboat market in 2013 increased 12% compared to 2012, climbing to $6.5 billion from $5.8 billion the previous year.

The average price of a traditional powerboat increased 13% to $40,550.

SOURCE: NMMA

TABLE 3.1.1

		2002	2003	2004	2005	2006	2007	2008
Outboard Boats	Total Units Sold	212,000	207,100	216,600	213,300	204,200	188,700	151,400
	Retail Value (Billions of Dollars)	$2.437	$2.743	$2.868	$3.201	$3.216	$3.359	$2.803
	Average Unit Cost	$11,495	$13,244	$13,239	$15,006	$15,748	$17,798	$18,513
Inboard Boats—Ski/Wakeboard Boats	Total Units Sold	10,500	11,100	11,600	12,600	13,100	12,000	8,900
	Retail Value (Billions of Dollars)	$0.399	$0.403	$0.435	$0.508	$0.568	$0.567	$0.449
	Average Unit Cost	$37,982	$36,332	$37,533	$40,297	$43,386	$47,234	$50,400
Inboard Boats—Cruisers	Total Units Sold	11,800	8,100	8,600	7,800	6,900	6,200	4,200
	Retail Value (Billions of Dollars)	$4.337	$3.020	$3.335	$3.119	$3.070	$2.888	$2.548
	Average Unit Cost	$367,505	$372,830	$387,771	$399,815	$444,872	$465,826	$606,621
Sterndrive Boats	Total Units Sold	69,300	69,200	71,100	72,300	67,700	60,400	38,500
	Retail Value (Billions of Dollars)	$2.192	$2.221	$2.368	$2.573	$2.724	$2.672	$1.789
	Average Unit Cost	$31,634	$32,097	$33,306	$35,592	$40,237	$44,238	$46,459
Jet Boats	Total Units Sold	5,100	5,600	5,600	6,700	6,200	6,800	4,900
	Retail Value (Billions of Dollars)	$0.108	$0.115	$0.130	$0.168	$0.152	$0.189	$0.138
	Average Unit Cost	$21,176	$20,584	$23,280	$25,108	$24,443	$27,784	$28,088
TOTAL TRADITIONAL POWERBOATS	**TOTAL UNITS SOLD**	**308,700**	**301,100**	**313,500**	**312,700**	**298,100**	**274,100**	**207,900**
	PERCENT CHANGE	**-2.9%**	**-2.5%**	**4.1%**	**-0.3%**	**-4.7%**	**-8.1%**	**-24.2%**
	RETAIL VALUE (BILLIONS)	**$9.472**	**$8.502**	**$9.136**	**$9.569**	**$9.729**	**$9.674**	**$7.726**
	PERCENT CHANGE	**9.4%**	**-10.2%**	**7.5%**	**4.7%**	**1.7%**	**-0.6%**	**-20.1%**
	AVERAGE UNIT COST	**$30,685**	**$28,238**	**$29,143**	**$30,600**	**$32,638**	**$35,295**	**$37,160**
	PERCENT CHANGE	**12.7%**	**-8.0%**	**3.2%**	**5.0%**	**6.7%**	**8.1%**	**5.3%**

		2009	2010	2011	2012	2013	% CHANGE
Outboard Boats	Total Units Sold	117,500	112,800	115,750	128,800	**134,800**	4.7%
	Retail Value (Billions of Dollars)	$2.157	$1.863	$2.126	$2.626	**$2.961**	12.8%
	Average Unit Cost	$18,356	$16,517	$18,369	$20,387	**$21,964**	7.7%
Inboard Boats—Ski/Wakeboard Boats	Total Units Sold	6,500	5,000	4,850	5,500	**6,100**	10.9%
	Retail Value (Billions of Dollars)	$0.348	$0.287	$0.297	$0.375	**$0.470**	25.1%
	Average Unit Cost	$53,516	$57,422	$61,300	$68,269	**$77,032**	12.8%
Inboard Boats—Cruisers	Total Units Sold	3,000	2,330	2,040	2,000	**2,200**	10.0%
	Retail Value (Billions of Dollars)	$1.921	$1.750	$1.726	$1.798	**$2.098**	16.7%
	Average Unit Cost	$640,418	$750,917	$845,869	$898,795	**$953,539**	6.1%
Sterndrive Boats	Total Units Sold	26,550	18,700	16,890	16,500	**15,100**	-8.5%
	Retail Value (Billions of Dollars)	$1.244	$0.914	$0.855	$0.883	**$0.895**	1.4%
	Average Unit Cost	$46,858	$48,882	$50,615	$53,516	**$59,290**	10.8%
Jet Boats	Total Units Sold	3,550	3,500	3,300	4,500	**3,000**	-33.3%
	Retail Value (Billions of Dollars)	$0.106	$0.115	$0.112	$0.160	**$0.113**	-29.5%
	Average Unit Cost	$29,774	$32,752	$34,082	$35,589	**$37,618**	5.7%
TOTAL TRADITIONAL POWERBOATS	**TOTAL UNITS SOLD**	**157,100**	**142,330**	**142,830**	**157,300**	**161,200**	**2.5%**
	PERCENT CHANGE	**-24.4%**	**-9.4%**	**0.4%**	**10.1%**	**12.9%**	
	RETAIL VALUE (BILLIONS)	**$5.776**	**$4.929**	**$5.116**	**$5.842**	**$6.537**	**11.9%**
	PERCENT CHANGE	**-25.2%**	**-14.7%**	**3.8%**	**14.2%**	**27.8%**	
	AVERAGE UNIT COST	**$36,765**	**$34,628**	**$35,822**	**$37,140**	**$40,550**	**13.2%**
	PERCENT CHANGE	**-1.1%**	**-5.8%**	**3.4%**	**3.7%**	**13.2%**	

3.2 Annual retail unit sales estimates

SOURCE: NMMA

TABLE 3.2

YEAR	OUTBOARD BOATS	INBOARD BOATS	STERNDRIVE BOATS	JET BOATS	PERSONAL WATERCRAFT	SAILBOATS*	CANOES	KAYAKS**	INFLATABLE BOATS***	SAILBOARDS*	ALL BOATS†	BOAT TRAILERS	OUTBOARD ENGINES	STERNDRIVE & INBOARD ENGINES
1980	290,000	8,200	56,000	—	—	73,100	105,000	—	16,400	21,000	**569,700**	176,000	315,000	87,750
1981	281,000	8,400	51,000	—	—	77,100	126,000	—	20,000	31,000	**594,500**	190,000	318,000	81,500
1982	236,000	8,325	55,000	—	—	53,400	101,000	—	18,800	27,000	**499,525**	160,000	293,000	85,650
1983	273,000	11,385	79,000	—	—	43,740	107,000	—	23,600	33,000	**570,725**	184,000	337,000	104,125
1984	317,000	15,280	108,000	—	—	40,750	103,000	—	30,700	43,000	**657,730**	200,000	411,000	148,000
1985	305,000	16,700	115,000	—	—	37,800	78,800	—	33,500	50,000	**636,800**	192,000	392,000	155,000
1986	314,000	18,000	120,000	—	—	37,200	80,200	—	30,600	60,000	**660,000**	194,000	410,000	161,900
1987	342,000	19,700	144,000	—	—	33,500	85,300	—	30,200	70,000	**724,700**	216,000	444,000	210,800
1988	355,000	20,900	148,000	—	—	14,500	89,800	—	32,200	65,000	**725,400**	223,000	460,000	211,900
1989	291,000	21,400	133,000	—	—	11,400	80,100	—	29,800	55,000	**621,700**	209,000	430,000	190,700
1990	227,000	15,000	97,000	—	—	11,800	75,300	—	26,600	42,000	**494,700**	165,000	352,000	134,100
1991	195,000	9,800	73,000	—	68,000	8,700	72,300	—	21,200	—	**448,000**	133,000	289,000	92,400
1992	192,000	9,950	75,000	—	79,000	10,600	78,000	—	22,200	—	**466,750**	147,000	272,000	94,600
1993	205,000	10,175	75,000	—	107,000	11,900	89,700	—	—	—	**498,775**	163,000	283,000	94,700
1994	220,000	11,400	90,000	—	142,000	13,000	99,800	—	—	—	**576,200**	176,000	308,000	114,000
1995	231,000	12,360	93,600	14,700	200,000	14,300	97,800	—	—	—	**663,760**	207,000	317,000	120,000
1996	215,000	11,350	94,500	14,100	191,000	15,900	92,900	—	—	—	**634,750**	194,000	308,000	120,000
1997	200,000	12,400	78,800	11,700	176,000	10,500	103,600	—	—	—	**593,000**	181,000	302,000	116,100
1998	213,700	17,600	77,700	10,100	130,000	14,500	107,800	—	—	—	**571,400**	174,000	314,000	104,500
1999	230,200	19,100	79,600	7,800	106,000	18,850	121,000	—	—	—	**582,550**	168,000	331,900	108,500
2000	241,200	23,900	78,400	7,000	92,000	22,500	111,800	—	—	—	**576,800**	158,500	348,700	110,400
2001	217,800	21,900	72,000	6,200	80,900	18,600	105,800	357,100	—	—	**880,300**	135,900	299,000	103,700
2002	212,000	22,300	69,300	5,100	79,300	15,800	100,000	340,300	—	—	**844,100**	141,200	302,100	105,000
2003	207,100	19,200	69,200	5,600	80,600	15,000	86,700	324,000	30,500	—	**837,900**	130,600	305,400	99,000
2004	216,600	20,200	71,100	5,600	79,500	14,300	93,900	337,300	31,600	—	**870,100**	133,400	315,300	103,800
2005	213,300	20,400	72,300	6,700	80,200	14,400	77,200	349,400	30,100	—	**864,000**	134,100	312,000	104,400
2006	204,200	20,000	67,700	6,200	82,200	12,900	99,900	393,400	25,100	—	**911,600**	130,900	301,700	97,900
2007	188,700	18,200	60,400	6,800	79,900	11,800	99,600	346,600	29,400	—	**841,400**	126,200	275,500	90,400
2008	151,400	13,100	38,500	4,900	62,600	9,300	73,700	322,700	28,300	—	**704,500**	92,400	227,000	57,700
2009	117,500	9,500	26,550	3,550	44,500	5,400	89,600	254,000	21,700	—	**572,300**	56,900	180,700	40,600
2010	112,800	7,330	18,700	3,500	41,600	4,300	77,100	228,000	24,300	—	**517,630**	65,100	178,900	29,200
2011	115,750	6,890	16,890	3,300	42,900	4,600	77,800	234,800	24,000	—	**526,930**	76,200	178,500	26,600
2012	128,800	7,500	16,500	4,500	38,500	5,945	78,600	239,500	26,500	—	**546,345**	77,400	193,200	26,800
2013	**134,800**	**8,300**	**15,100**	**3,000**	**39,400**	**5,600**	**74,100**	**225,800**	**26,000**	**—**	532,100	**85,800**	**198,100**	**26,200**

— Data not available.
*Sailboats data source: The Sailing Company's Annual Sailing Business Review.
**Kayak category added in 2001.
***Inflatable boat data added back to the category in 2003.
† Total does not include houseboats.

5.1 U.S. recreational marine retail expenditures and new boat unit sales

Recreational boating retail expenditures for products and services increased 3% in 2013 to a total of $36.7 billion, compared to $35.6 billion in 2012. 532,170 new boats were sold in 2013, down 2.6% compared to the previous year.

SOURCE: NMMA

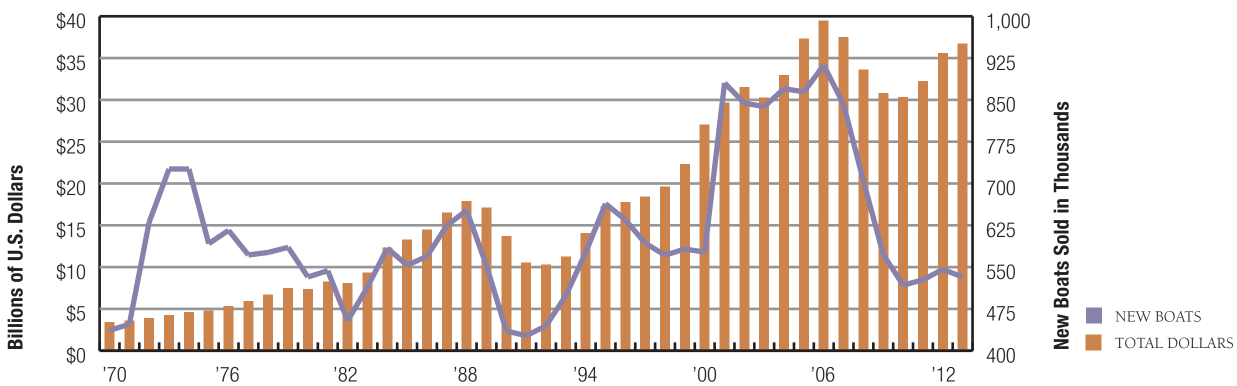
TABLE 5.1

YEAR	TOTAL DOLLARS (BILLIONS)	NEW BOATS (THOUSANDS)
1970	$3.440	436.5
1971	$3.610	447.5
1972	$3.900	631.0
1973	$4.245	726.0
1974	$4.607	729.0
1975	$4.800	592.1
1976	$5.333	615.9
1977	$5.920	571.8
1978	$6.690	576.3
1979	$7.500	585.5
1980	$7.370	532.3
1981	$8.250	543.5
1982	$8.100	453.7
1983	$9.375	514.1
1984	$12.340	584.0
1985	$13.284	553.3
1986	$14.479	569.4
1987	$16.500	624.5
1988	$17.927	651.8
1989	$17.143	552.7
1990	$13.731	435.5
1991	$10.564	426.8

YEAR	TOTAL DOLLARS (BILLIONS)	NEW BOATS (THOUSANDS)
1992	$10.317	444.6
1993	$11.254	498.8
1994	$14.071	576.2
1995	$17.226	663.8
1996	$17.753	634.8
1997	$18.438	593.0
1998	$19.663	571.4
1999	$22.321	582.5
2000	$27.065	576.8
2001*	$29.710	880.3
2002	$31.563	844.1
2003**	$30.283	837.9
2004	$32.953	870.1
2005	$37.317	864.4
2006	$39.493	912.1
2007	$37.416	841.8
2008	$33.624	704.8
2009	$30.821	572.5
2010	$30.434	517.7
2011	$32.271	527.0
2012	$35.591	546.4
2013	**$36.736**	**532.2**

*In 2001, kayaks, representing 357,000 units, were added to the market mix.
**In 2003, inflatables, representing 31,000 units, were added to the market mix.

CHART 5.1



5.2 Retail expenditure estimates for recreational boating

New boat and engine retail sales totaled $9.8 billion in 2013, an increase of 10% from the previous year.

Pre-owned boat and engine retail sales totaled $12.1 billion, up 3% compared to 2012.

Aftermarket accessory totaled an estimated $4.9 billion in 2013, down 12% compared to 2012. “Other” expenditures increased 5% to $9.8 billion in 2013.

Total retail expenditures for recreational marine products and services in 2013 totaled $36.7 billion, up 3% from the previous year to nearly match the pre-recession total of $37.5 billion reached in 2007.

SOURCE: NMMA

TABLE 5.2

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
New Boats	837,900††	870,100	864,450	912,130	841,820	704,820	572,520	517,745	527,005	546,395
Total New Boat Retail Dollars (Billions)	$10.027	$10.754	$11.574	$11.891	$11.739	$9.177	$6.847	$5.857	$6.060	$6.799
Average New Boat Retail Price	$11,967	$12,360	$13,389	$13,037	$13,944	$13,021	$11,959	$11,312	$11,500	$12,443
Pre-owned Boats*	1,006,200	1,006,400	1,032,100	1,004,200	961,800	886,800	953,200	929,900	909,900	969,400
Total Pre-owned Boat Dollars (Billions)	$7.362	$7.901	$9.112	$10.535	$9.641	$9.451	$9.840	$9.923	$8.846	$9.812
Average Pre-owned Boat Price	$7,316	$7,850	$8,829	$10,491	$10,024	$10,658	$10,323	$10,671	$9,722	$10,122
New Outboard Engines	305,400	315,300	312,000	301,700	275,500	227,000	180,700	178,900	178,500	193,200
Total New Outboard Motor Retail Dollars (Billions)	$2.555	$2.879	$3.155	$3.255	$2.689	$2.071	$1.659	$1.722	$1.794	$2.057
Average New Outboard Motor Retail Price	$8,365	$9,131	$10,112	$10,790	$9,761	$9,125	$9,178	$9,624	$10,052	$10,649
Pre-owned Outboard Engines	520,005	536,862	531,200	515,700	469,100	463,100	504,600	482,985	483,000	518,400
Total Pre-owned Outboard Motor Dollars (Billions)	$1.566	$1.765	$1.934	$1.947	$1.741	$1.479	$1.621	$1.627	$1.699	$1.931
Average Pre-owned Outboard Motor Price	$3,011	$3,287	$3,641	$3,776	$3,711	$3,194	$3,212	$3,368	$3,518	$3,727
New Boat Trailers	130,600	133,400	134,100	130,900	126,200	92,400	56,900	65,100	76,200	77,400
Total New Boat Trailer Retail Dollars (Billions)	$0.202	$0.228	$0.248	$0.296	$0.232	$0.162	$0.088	$0.102	$0.122	$0.133
Average New Boat Trailer Retail Price	$1,547	$1,709	$1,849	$2,260	$1,839	$1,750	$1,555	$1,569	$1,603	$1,714
Estimated Boat/Motor/Trailer Dollars (Billions)	$27.711	$23.526	$26.023	$27.925	$26.042	$22.341	20.055	$19.320	$18.522	$20.732
Estimated Accessory Aftermarket Sales (Billions)	$2.124	$2.421	$2.905	$2.760	$2.608	$2.431	$2.309	$2.443	$3.980	$5.585**
SUBTOTAL (Billions)	$23.834	$25.947	$28.928	$30.685	$28.650	$24.772	$22.364	$21.674	$22.502	$26.318
Estimated Other (fuel, finance, insurance, docking, maintenance, etc.) (Billions)	$6.448	$7.006	$8.389	$8.808	$8.842	$9.038	$8.457	$8.760	$9.769	$9.273
TOTAL EXPENDITURES (Billions)	**$30.283**	**$32.953**	**$37.317**	**$39.493**	**$37.492**	**$33.809**	**$30.821**	**$30.434**	**$32.271**	**$35.591**
PERCENT CHANGE	**-4.5%**	**8.8%**	**13.2%**	**5.8%**	**-5.1%**	**-9.8%**	**-17.8%**	**-1.3%**	**6.0%**	**10.3%**
TOTAL NEW BOAT EXPENDITURES (Billions)	**$12.581**	**$13.633**	**$14.729**	**$15.147**	**$14.428**	**$11.249**	**$8.505**	**$7.579**	**$7.855**	**$8.856**
PERCENT CHANGE	**-6.3%**	**8.4%**	**8.0%**	**2.8%**	**-4.7%**	**-22.0%**	**-24.4%**	**-10.9%**	**3.6%**	**12.8%**
PERCENT EXPENDITURES	**58.5%**	**58.5%**	**57.1%**	**54.8%**	**55.9%**	**50.7%**	**42.6%**	**39.6%**	**42.7%**	**43.0%**
PRE-OWNED EXPENDITURES (Billions)	**$8.927**	**$9.665**	**$11.046**	**$12.482**	**$11.382**	**$10.930**	**$11.461**	**$11.550**	**$10.545**	**$11.743**
PERCENT CHANGE	**-6.1%**	**8.3%**	**14.3%**	**13.0%**	**-8.8%**	**-12.4%**	**4.9%**	**0.8%**	**-8.7%**	**11.4%**
PERCENT EXPENDITURES	**41.5%**	**41.5%**	**42.9%**	**45.2%**	**44.1%**	**49.3%**	**57.4%**	**60.4%**	**57.3%**	**57.0%**

*Outboard, sterndrive, inboard, PWC, jet boat and sail.

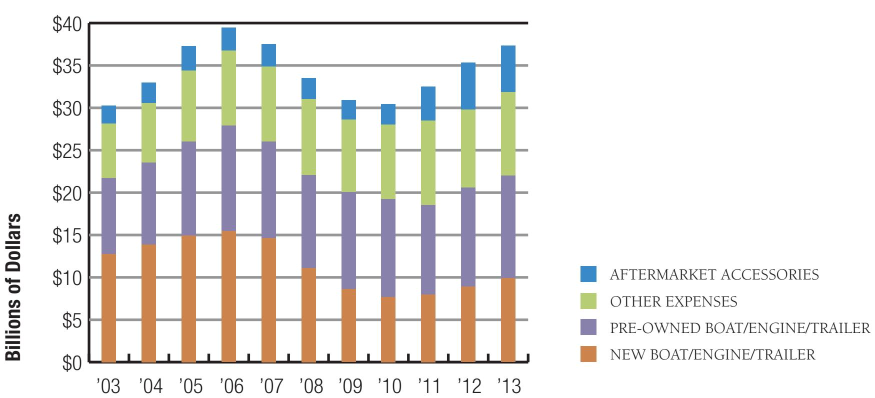
††Includes 30,500 inflatables not previously reported.

**2012 spending estimates are not directly comparable to 2011 (2011 spending estimates were collected in total, while 2012 amounts were collected individually by accessory then totaled).

TABLE 5.2 Continued

	2013	% CHANGE
New Boats	**532,170**	-2.6%
Total New Boat Retail Dollars (Billions)	**$7.550**	11.1%
Average New Boat Retail Price	**$14,188**	14.0%
Pre-owned Boats*	**955,300**	-1.5%
Total Pre-owned Boat Dollars (Billions)	**$10.095**	2.9%
Average Pre-owned Boat Price	**$10,568**	4.4%
New Outboard Engines	**198,100**	2.5%
Total New Outboard Motor Retail Dollars (Billions)	**$2.211**	7.4%
Average New Outboard Motor Retail Price	**$11,159**	4.8%
Pre-owned Outboard Engines	**518,900**	0.1%
Total Pre-owned Outboard Motor Dollars (Billions)	**$2.026**	4.9%
Average Pre-owned Outboard Motor Price	**$3,905**	4.8%
New Boat Trailers	**85,800**	10.9%
Total New Boat Trailer Retail Dollars (Billions)	**$0.148**	11.8%
Average New Boat Trailer Retail Price	**$1,729**	0.9%
Estimated Boat/Motor/Trailer Dollars (Billions)	**$22.031**	6.3%
Estimated Accessory Aftermarket Sales (Billions)	**$4.918**	-12.0%
SUBTOTAL (Billions)	**$26.949**	2.4%
Estimated Other (fuel, finance, insurance, docking, maintenance, etc.) (Billions)	**$9.787**	5.5%
TOTAL EXPENDITURES (Billions)	**$36.736**	**3.2%**
PERCENT CHANGE	**3.2%**	
TOTAL NEW BOAT EXPENDITURES (Billions)	**$9.761**	**10.2%**
PERCENT CHANGE	**10.2%**	
PERCENT EXPENDITURES	**44.6%**	
PRE-OWNED EXPENDITURES (Billions)	**$12.122**	**3.2%**
PERCENT CHANGE	**3.2%**	
PERCENT EXPENDITURES	**55.4%**	

CHART 5.2



5.3 Traditional powerboat sales by market segment

Retail sales for both new and pre-owned boats in the traditional powerboat market (outboard, inboard, sterndrive and jet boats) totaled $15.8 billion in 2013, a 7% increase compared to 2012. Dollar sales increased for both new and pre-owned traditional powerboats, up 12% and 4%, respectively, for the year.

A total of 960,000 traditional powerboats changed hands in 2013, approximately 3,000 fewer sales than during the previous year.

SOURCE: NMMA

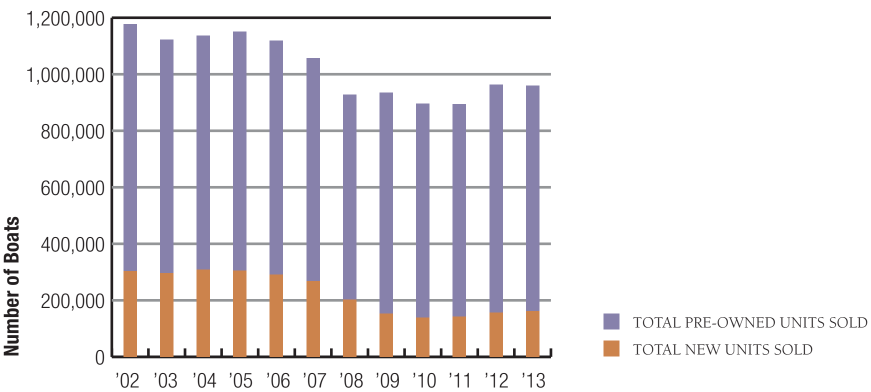
TABLE 5.3

NEW BOAT SALES	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	% CHANGE
Outboard Boats													
Total Units Sold	212,000	207,100	216,600	213,300	204,200	188,700	151,400	117,500	112,800	115,750	128,800	**134,800**	4.7%
Retail Value (Billions)	$2.437	$2.743	$2.868	$3.201	$3.216	$3.359	$2.803	$2.157	$1.973	$2.126	$2.626	**$2.961**	12.8%
Average Unit Cost	$11,495	$13,244	$13,239	$15,006	$15,748	$17,798	$18,513	$18,356	$17,492	$18,369	$20,387	**$21,965**	7.7%
Inboard Boats—Ski/Wakeboard Boats													
Total Units Sold	10,500	11,100	11,600	12,600	13,100	12,000	8,900	6,500	5,000	4,850	5,500	**6,100**	10.9%
Retail Value (Billions)	$0.399	$0.403	$0.435	$0.508	$0.568	$0.567	$0.449	$0.348	$0.287	$0.297	$0.375	**$0.470**	25.1%
Average Unit Cost	$37,982	$36,332	$37,533	$40,297	$43,386	$47,234	$50,403	$53,519	$57,432	$61,300	$68,269	**$77,032**	12.8%
Inboard Boats—Cruisers													
Total Units Sold	11,800	8,100	8,600	7,800	6,900	6,200	4,200	3,000	2,330	2,040	2,000	**2,200**	10.0%
Retail Value (Billions)	$4.337	$3.020	$3.335	$3.119	$3.070	$2.888	$2.548	$1.921	$1.750	$1.726	$1.798	**$2.098**	16.7%
Average Unit Cost	$367,505	$372,830	$387,771	$399,815	$444,872	$465,826	$606,621	$640,418	$750,917	$845,869	$898,795	**$953,539**	6.1%
Sterndrive Boats													
Total Units Sold	69,300	69,200	71,100	72,300	67,700	60,400	38,500	26,550	18,700	16,890	16,550	**15,100**	-8.8%
Retail Value (Billions)	$2.192	$2.221	$2.368	$2.573	$2.724	$2.672	$1.789	$1.244	$0.877	$0.857	$0.884	**$0.894**	1.2%
Average Unit Cost	$31,634	$32,097	$33,306	$35,592	$40,237	$44,237	$46,459	$46,859	$46,894	$50,731	$53,397	**$59,202**	10.9%
Jet Boats													
Total Units Sold	5,100	5,600	5,600	6,700	6,200	6,800	4,900	3,550	3,500	3,300	4,500	**3,000**	-33.3%
Retail Value (Billions)	$0.108	$0.115	$0.130	$0.168	$0.152	$0.189	$0.138	$0.106	$0.115	$0.112	$0.160	**$0.113**	-29.5%
Average Unit Cost	$21,176	$20,584	$23,280	$25,108	$24,443	$27,784	$28,088	$29,774	$32,752	$34,082	$35,589	**$37,618**	5.7%
TOTAL NEW UNITS SOLD	**308,700**	**301,100**	**313,500**	**312,700**	**298,100**	**274,100**	**207,900**	**157,100**	**142,330**	**142,830**	**157,350**	**161,200**	**2.4%**
PERCENT CHANGE	**-2.9%**	**-2.5%**	**4.1%**	**-0.3%**	**-4.7%**	**-8.1%**	**-24.2%**	**-24.4%**	**-9.4%**	**0.4%**	**10.2%**	**2.4%**	
TOTAL RETAIL VALUE NEW	**$9.472**	**$8.502**	**$9.136**	**$9.569**	**$9.729**	**$9.674**	**$7.726**	**$5.776**	**$5.002**	**$5.118**	**$5.843**	**$6.535**	**11.9%**
PERCENT CHANGE	**9.4%**	**-10.2%**	**7.5%**	**4.7%**	**1.7%**	**-0.6%**	**-20.1%**	**-25.2%**	**-13.4%**	**2.3%**	**14.2%**	**11.9%**	

TABLE 5.3 Continued

PRE-OWNED BOAT SALES	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	% CHANGE
Outboard Boats													
Total Units Sold	608,908	575,060	589,884	611,100	590,800	571,500	519,300	565,800	541,600	541,600	583,400	**584,200**	0.1%
Retail Value (Billions)	$1.721	$2.069	$2.163	$2.853	$2.855	$2.498	$2.403	$2.596	$2.236	$3.482	$4.163	**$4.491**	7.9%
Average Unit Cost	$2,826	$3,598	$3,667	$4,669	$4,832	$4,371	$4,628	$4,589	$4,129	$6,429	$7,136	**$7,687**	7.7%
Inboard Boats													
Total Units Sold	50,585	49,633	46,507	47,500	46,900	45,800	40,600	39,300	39,100	41,200	38,300	**39,900**	4.2%
Retail Value (Billions)	$3.572	$2.582	$2.844	$3.956	$4.219	$2.945	$3.467	$3.547	$3.879	$2.298	$2.429	**$2.595**	6.9%
Average Unit Cost	$70,620	$52,030	$61,156	$83,278	$89,948	$64,297	$85,394	$90,251	$99,209	$55,767	$63,407	**$65,040**	2.6%
Sterndrive Boats													
Total Units Sold	213,845	202,412	192,164	186,300	189,600	172,800	164,600	175,200	175,800	156,900	171,000	**162,300**	-5.1%
Retail Value (Billions)	$1.654	$1.676	$1.786	$2.171	$2.409	$1.991	$2.187	$2.348	$2.458	$2.129	$2.253	**$2.096**	-7.0%
Average Unit Cost	$7,734	$8,278	$9,296	$11,651	$12,708	$11,522	$13,287	$13,401	$13,980	$13,569	$13,178	**$12,914**	-2.0%
Jet Boats													
Total Units Sold	12,002	10,161	10,462	10885	11500	11300	10,432	11,700	11,400	11,700	12,900	**12,500**	-3.1%
Retail Value (Billions)	$0.111	$0.095	$0.102	$0.113	$0.135	$0.146	$0.142	$0.160	$0.156	$0.065	$0.075	**$0.073**	-2.1%
Average Unit Cost	$9,255	$9,390	$9,744	$10,413	$11,772	$12,942	$13,592	$13,709	$13,719	$5,556	$5,806	**$5,864**	1.0%
TOTAL PRE-OWNED UNITS SOLD	**885,340**	**837,266**	**839,017**	**855,785**	**838,800**	**801,400**	**734,932**	**792,000**	**767,900**	**751,400**	**805,600**	**798,900**	**-0.8%**
PERCENT CHANGE	**1.5%**	**-5.4%**	**0.2%**	**2.0%**	**-2.0%**	**-4.5%**	**-8.3%**	**7.8%**	**4.5%**	**-5.1%**	**7.2%**	**-0.8%**	
TOTAL PRE-OWNED VALUE (Billions)	**$7.058**	**$6.423**	**$6.896**	**$9.093**	**$9.618**	**$7.580**	**$8.199**	**$8.652**	**$8.730**	**$7.974**	**$8.920**	**$9.255**	**3.8%**
PERCENT CHANGE	**8.2%**	**-9.0%**	**7.4%**	**31.9%**	**5.8%**	**-21.2%**	**8.2%**	**5.5%**	**6.5%**	**-7.8%**	**11.9%**	**3.8%**	
TOTAL UNITS SOLD	**1,194,040**	**1,138,366**	**1,152,517**	**1,168,485**	**1,136,900**	**1,075,500**	**942,832**	**933,850**	**910,230**	**894,230**	**962,950**	**960,100**	**-0.3%**
PERCENT CHANGE	**0.3%**	**-4.7%**	**1.2%**	**1.4%**	**-2.7%**	**-5.4%**	**-12.3%**	**0.7%**	**-3.5%**	**-4.2%**	**7.7%**	**-0.3%**	
TOTAL VALUE (Billions)	**$16.530**	**$14.925**	**$16.032**	**$18.661**	**$19.348**	**$17.254**	**$15.925**	**$14.161**	**$13.732**	**$13.092**	**$14.763**	**12.8%**	
PERCENT CHANGE	**8.9%**	**-9.7%**	**7.4%**	**16.4%**	**3.7%**	**-10.8%**	**-7.7%**	**-9.5%**	**-13.8%**	**-7.6%**	**12.8%**	**$15.791**	**7.0%**
TOTAL NEW UNITS SOLD	**303,600**	**295,500**	**307,900**	**312,700**	**298,100**	**274,100**	**207,900**	**153,550**	**142,330**	**142,830**	**157,350**	**161,200**	
TOTAL PRE-OWNED UNITS SOLD	**873,338**	**827,105**	**828,555**	**855,785**	**838,800**	**801,400**	**734,932**	**780,300**	**767,900**	**751,400**	**805,600**	**798,900**	

CHART 5.3



5.6 Distribution of new powerboat, engine, trailer and accessory purchases by state

Consumers spent $14.3 billion on new powerboats, outboard engines, boat trailers and aftermarket accessories collectively in 2013, up 2% from the previous year.

Florida again ranked first in total expenditures for new powerboats, engines, trailers and accessories. Spending in Florida during 2013 increased 16% compared to the previous year.

SOURCE: NMMA

TABLE 5.6

STATE	RANK	NEW POWERBOATS	OUTBOARD ENGINES	BOAT TRAILERS	AFTERMARKET ACCESSORIES	2013 TOTAL EXPENDITURES	% CHANGE	2012 TOTAL EXPENDITURES	2011 TOTAL EXPENDITURES	2010 TOTAL EXPENDITURES
AL	12	$162,963,955	$67,558,817	$4,853,162	$159,315,661	**$394,691,594**	-4.5%	$413,363,169	$332,968,042	$256,066,944
AK	36	$66,537,967	$32,039,835	$698,088	$24,232,220	**$123,508,111**	-4.7%	$129,556,424	$130,268,850	$117,663,507
AZ	38	$48,814,547	$11,021,604	$1,194,582	$39,337,691	**$100,368,424**	15.9%	$86,625,436	$80,975,042	$72,738,952
AR	21	$93,859,524	$42,671,176	$3,262,664	$106,997,093	**$246,790,457**	-11.7%	$279,532,656	$200,870,584	$168,729,158
CA	10	$221,877,400	$66,992,790	$4,165,782	$138,660,307	**$431,696,279**	17.6%	$367,016,212	$312,980,668	$310,262,319
CO	40	$47,430,704	$9,759,215	$921,142	$30,445,784	**$88,556,845**	1.7%	$87,063,948	$74,091,018	$70,327,111
CT	35	$71,677,416	$15,977,280	$1,084,098	$36,301,773	**$125,040,567**	1.4%	$123,258,340	$114,279,108	$110,186,051
DE	4	$506,983,373	$10,492,560	$1,337,489	$55,508,926	**$574,322,347**	19.2%	$481,750,047	$384,643,294	$343,743,963
DC	51	$3,169,309	$3,811,166	$5,282	$246,501	**$7,232,258**	21.4%	$5,957,899	$3,543,553	$8,744,647
FL	1	$1,084,751,650	$340,183,070	$15,395,149	$517,051,435	**$1,957,381,303**	15.7%	$1,691,912,678	$1,472,842,934	$1,094,727,825
GA	11	$182,837,746	$54,876,545	$4,673,499	$153,864,945	**$396,252,736**	14.7%	$345,383,391	$304,240,349	$248,206,545
HI	49	$10,387,102	$8,665,327	$146,312	$4,919,293	**$24,118,032**	-6.4%	$25,768,579	$22,073,599	$14,233,933
ID	34	$82,612,979	$9,059,503	$978,434	$33,228,392	**$125,879,308**	2.3%	$123,092,559	$96,905,789	$96,202,073
IL	17	$132,086,254	$53,108,220	$3,295,508	$109,002,580	**$297,492,562**	-10.7%	$333,041,322	$267,676,121	$245,883,649
IN	23	$89,107,400	$34,316,038	$2,774,669	$91,070,550	**$217,268,657**	-3.1%	$224,133,451	$176,976,950	$145,454,129
IA	27	$74,461,647	$26,757,342	$2,241,990	$73,654,534	**$177,115,513**	10.1%	$160,921,252	$153,827,180	$119,032,241
KS	44	$25,253,919	$9,362,700	$685,077	$22,510,421	**$57,812,117**	-15.2%	$68,177,864	$60,447,728	$58,461,280
KY	28	$69,818,190	$31,441,195	$2,051,084	$67,468,619	**$170,779,087**	-5.2%	$180,212,417	$144,331,103	$127,937,841
LA	9	$184,670,059	$105,956,523	$5,518,091	$181,580,932	**$477,725,606**	-4.6%	$500,901,331	$447,345,940	$360,634,959
ME	32	$76,872,351	$13,122,980	$1,482,596	$49,318,437	**$140,796,365**	-8.1%	$153,236,561	$116,010,887	$84,469,137
MD	26	$98,133,317	$36,702,784	$1,505,663	$50,367,989	**$186,709,754**	-20.2%	$233,999,128	$162,080,553	$183,255,626
MA	25	$119,945,846	$33,127,083	$1,483,372	$50,199,189	**$204,755,489**	4.5%	$195,920,518	$171,889,664	$163,594,867
MI	3	$286,031,247	$87,898,434	$8,313,454	$273,867,615	**$656,110,750**	1.6%	$645,493,497	$454,154,038	$350,805,956
MN	5	$204,623,309	$104,015,620	$7,350,085	$241,279,776	**$557,268,790**	0.7%	$553,336,653	$411,761,958	$288,620,438
MS	29	$61,896,467	$30,458,959	$2,050,053	$67,263,762	**$161,669,241**	-10.6%	$180,855,252	$137,118,675	$112,550,306
MO	15	$138,889,718	$49,161,068	$3,995,729	$131,667,392	**$323,713,907**	-2.0%	$330,272,622	$259,035,906	$204,116,434
MT	37	$57,295,249	$11,928,384	$1,069,764	$35,611,883	**$105,905,280**	15.4%	$91,753,952	$63,890,372	$71,798,988
NE	41	$36,088,308	$12,559,169	$1,079,317	$35,411,885	**$85,138,679**	-1.8%	$86,717,524	$67,483,519	$49,086,854
NV	46	$19,961,172	$4,734,665	$461,514	$15,229,364	**$40,386,716**	-13.2%	$46,513,409	$39,506,686	$33,978,331
NH	31	$85,282,121	$5,645,776	$1,644,383	$54,500,745	**$147,073,025**	9.2%	$134,691,072	$102,673,304	$78,646,789
NJ	20	$139,687,228	$28,343,108	$2,689,383	$89,300,667	**$260,020,385**	2.3%	$254,222,035	$228,046,696	$183,044,985
NM	50	$9,293,663	$2,373,495	$219,074	$7,207,199	**$19,093,432**	-19.2%	$23,615,883	$24,663,552	$24,402,156
NY	6	$285,499,027	$75,559,847	$5,588,930	$185,540,839	**$552,188,643**	2.6%	$538,212,884	$447,510,648	$401,353,400
NC	8	$234,878,778	$88,795,786	$5,445,312	$179,121,424	**$508,241,300**	3.5%	$491,050,390	$402,817,530	$360,880,243
ND	33	$46,954,036	$30,606,678	$1,566,580	$51,412,188	**$130,539,483**	5.7%	$123,486,617	$73,556,435	$56,534,332
OH	18	$133,156,069	$42,229,214	$3,493,448	$115,174,734	**$294,053,466**	-14.2%	$342,848,331	$309,481,556	$234,697,853
OK	24	$93,261,384	$28,687,948	$2,463,036	$81,146,329	**$205,558,698**	-15.5%	$243,174,695	$223,727,699	$190,262,904
OR	30	$84,056,732	$26,936,783	$1,354,871	$45,497,292	**$157,845,678**	10.3%	$143,068,651	$138,054,684	$135,772,831
PA	19	$124,608,025	$41,670,694	$2,957,516	$97,920,852	**$267,157,087**	-8.0%	$290,447,556	$250,360,433	$226,281,490
RI	45	$34,357,985	$5,867,110	$336,049	$11,531,196	**$52,092,340**	-18.1%	$63,593,669	$43,655,948	$48,565,937
SC	13	$164,606,182	$64,842,699	$3,949,073	$130,186,576	**$363,584,529**	2.8%	$353,577,762	$267,542,308	$221,098,219
SD	39	$36,918,349	$16,698,982	$1,140,124	$37,430,024	**$92,187,479**	-4.5%	$96,546,707	$58,279,381	$44,446,263
TN	16	$125,432,261	$52,701,905	$3,692,823	$121,247,299	**$303,074,289**	-6.5%	$324,003,866	$262,668,372	$223,780,369
TX	2	$545,701,637	$177,241,484	$13,396,803	$440,632,611	**$1,176,972,535**	-1.6%	$1,195,918,200	$981,932,819	$812,074,612
UT	42	$43,522,344	$7,209,738	$884,685	$29,128,257	**$80,745,024**	7.1%	$75,375,042	$43,151,986	$50,728,918
VT	47	$14,681,350	$1,799,323	$401,398	$13,160,588	**$30,042,660**	-2.2%	$30,731,805	$28,570,942	$23,247,514
VA	22	$111,668,673	$45,774,973	$2,558,596	$84,450,520	**$244,452,763**	-18.6%	$300,251,199	$221,348,291	$249,131,697
WA	14	$204,607,580	$55,623,335	$2,677,334	$90,762,892	**$353,671,141**	9.2%	$323,982,688	$285,305,783	$298,995,512
WV	43	$27,007,583	$8,272,788	$742,978	$24,482,146	**$60,505,495**	46.8%	$41,214,706	$56,700,690	$43,434,300
WI	7	$207,950,336	$81,907,923	$6,765,789	$222,318,012	**$518,942,061**	0.0%	$519,088,519	$377,729,730	$292,112,414
WY	48	$10,724,104	$4,067,657	$306,362	$10,044,658	**$25,142,781**	-26.7%	$34,310,030	$23,353,099	$20,086,099
TOTAL		**$7,022,893,569**	**$2,210,617,300**	**$148,348,200**	**$4,917,812,000**	**$14,299,671,068**	**1.5%**	**$14,089,180,400**	**$11,515,352,000**	**$9,731,092,900**

TABLE 5.6 Continued

STATE	RANK	2009 TOTAL EXPENDITURES	2008 TOTAL EXPENDITURES	2007 TOTAL EXPENDITURES	2006 TOTAL EXPENDITURES	2005 TOTAL EXPENDITURES	2004 TOTAL EXPENDITURES
AL	12	$300,135,140	$342,283,089	$421,181,197	$379,779,003	$320,815,523	$274,733,046
AK	36	$117,578,219	$135,584,790	$150,048,109	$178,048,741	$152,351,582	$135,912,569
AZ	38	$89,716,556	$148,159,057	$226,179,090	$229,892,300	$230,535,401	$158,670,740
AR	21	$170,956,084	$178,512,478	$218,648,739	$202,286,108	$181,625,252	$200,610,874
CA	10	$417,176,557	$594,740,334	$976,879,799	$1,210,422,380	$1,274,045,713	$1,201,149,368
CO	40	$83,068,955	$105,251,445	$121,633,176	$115,234,154	$105,555,917	$104,450,509
CT	35	$106,701,744	$173,545,265	$205,247,490	$210,873,146	$228,487,019	$221,531,087
DE	4	$330,044,691	$443,141,606	$304,048,064	$246,943,400	$256,691,940	$224,863,762
DC	51	$9,916,466	$9,167,095	$9,687,430	$10,641,826	$23,570,046	$8,182,172
FL	1	$1,190,633,848	$1,554,567,646	$2,129,295,749	$2,427,156,555	$2,484,174,983	$2,113,882,354
GA	11	$270,121,508	$334,998,330	$463,986,204	$488,408,187	$417,955,532	$413,191,188
HI	49	$17,832,431	$22,990,403	$50,433,321	$45,489,781	$42,286,520	$33,008,483
ID	34	$114,263,517	$139,797,107	$176,073,703	$190,857,459	$176,204,726	$166,726,128
IL	17	$233,742,291	$301,379,169	$359,228,332	$369,072,235	$392,299,741	$363,895,634
IN	23	$144,688,461	$185,777,552	$218,912,270	$203,482,442	$199,440,112	$215,951,491
IA	27	$130,235,558	$125,808,954	$157,155,134	$162,357,469	$141,847,752	$144,607,806
KS	44	$55,473,784	$78,021,350	$79,768,989	$80,366,527	$74,141,247	$75,999,901
KY	28	$127,889,623	$154,416,486	$177,201,715	$178,891,445	$162,034,486	$163,555,826
LA	9	$370,073,670	$433,158,917	$469,494,655	$459,211,104	$354,484,171	$324,799,791
ME	32	$91,398,618	$119,821,330	$167,075,708	$189,115,260	$221,220,733	$96,835,257
MD	26	$181,077,953	$248,503,250	$340,947,731	$349,687,968	$407,586,400	$382,044,528
MA	25	$161,268,089	$220,717,438	$256,920,248	$293,757,293	$317,684,088	$314,217,830
MI	3	$317,220,411	$373,203,140	$476,329,790	$495,140,118	$525,545,415	$526,266,249
MN	5	$305,264,953	$382,032,670	$448,913,366	$510,548,845	$520,251,462	$583,732,570
MS	29	$135,511,040	$158,867,633	$190,983,007	$195,215,256	$136,005,211	$125,840,643
MO	15	$209,656,295	$266,948,621	$335,679,518	$349,638,027	$354,318,070	$352,164,122
MT	37	$73,418,386	$93,115,472	$96,665,995	$86,036,319	$69,801,779	$69,752,160
NE	41	$49,095,062	$61,481,507	$60,375,119	$60,809,769	$56,711,862	$55,872,522
NV	46	$40,640,886	$63,308,103	$99,008,200	$115,475,676	$111,190,743	$80,052,420
NH	31	$84,328,081	$87,894,305	$139,981,779	$152,705,066	$158,515,542	$162,327,076
NJ	20	$225,790,951	$297,037,953	$347,517,879	$414,715,749	$426,586,762	$416,644,971
NM	50	$29,009,706	$39,489,255	$34,735,021	$93,832,889	$73,147,266	$51,724,743
NY	6	$381,176,600	$509,727,145	$600,366,673	$600,665,222	$665,420,248	$629,972,701
NC	8	$395,370,300	$504,277,454	$664,855,846	$649,032,985	$625,305,547	$518,796,961
ND	33	$53,741,728	$57,535,995	$52,466,607	$51,143,586	$46,407,000	$49,904,771
OH	18	$222,390,573	$266,070,874	$302,039,178	$307,353,609	$305,447,031	$308,015,511
OK	24	$205,166,330	$231,771,374	$220,344,084	$213,309,246	$185,742,059	$257,532,885
OR	30	$148,255,108	$182,273,601	$277,760,057	$311,716,837	$328,453,018	$404,682,021
PA	19	$202,295,555	$235,249,667	$251,421,990	$260,077,883	$293,208,890	$245,311,048
RI	45	$56,497,085	$60,218,618	$88,734,532	$93,915,874	$114,707,947	$122,675,820
SC	13	$242,111,968	$336,422,777	$465,078,700	$437,921,292	$409,443,784	$310,705,802
SD	39	$41,850,836	$53,470,054	$46,915,258	$44,908,835	$42,121,415	$47,766,684
TN	16	$232,938,784	$290,762,564	$375,850,357	$365,196,435	$308,685,654	$305,274,531
TX	2	$906,038,110	$1,060,294,537	$1,145,897,153	$1,050,933,023	$989,164,242	$830,337,851
UT	42	$57,745,051	$87,164,627	$119,682,320	$109,692,937	$84,482,110	$65,478,547
VT	47	$23,292,739	$23,738,943	$32,609,451	$32,270,993	$32,171,621	$32,210,226
VA	22	$274,064,987	$322,885,615	$437,542,631	$443,606,722	$431,192,484	$397,038,594
WA	14	$338,733,741	$402,881,675	$555,993,293	$597,583,718	$638,026,034	$576,657,939
WV	43	$47,219,492	$54,334,123	$53,388,485	$49,919,056	$48,384,579	$39,249,052
WI	7	$298,150,574	$361,366,391	$458,766,451	$473,544,724	$469,768,096	$471,686,101
WY	48	$26,409,205	$33,682,419	$30,990,307	$29,036,377	$22,595,666	$21,188,495
$10,337,378,300		**$12,947,850,200**	**$16,090,939,900**	**$16,817,921,853**	**$16,637,840,420**	**$15,397,683,358**	

6.1 U.S. State recreational boat registrations

Boat registrations declined 0.6% in 2012, falling to a total of 12.1 million. Historically, registrations have fluctuated, typically varying within the 2% range as registration renewal deadlines vary by state.

Among the top 20 states, Michigan and South Carolina represented the extremes, down 9% and up 3%, respectively.

SOURCE: USCG/NMMA

TABLE 6.1

2012 RANKING	STATE	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	% CHANGE '12 vs '11
1	Florida	922,597	939,968	946,072	973,859	988,652	991,680	974,553	949,030	914,535	889,895	**870,031**	-2.2%
2	Minnesota	834,974	845,379	853,448	853,489	862,937	866,496	867,446	811,775	813,976	808,783	**817,996**	1.1%
3	Michigan	1,000,337	953,554	944,800	944,138	828,529	830,743	816,752	811,670	812,066	803,391	**804,088**	0.1%
4	California	896,090	963,379	894,884	963,758	893,828	964,881	858,853	906,988	810,008	855,243	**776,584**	-9.2%
5	Wisconsin	619,124	610,800	605,467	639,198	635,751	617,366	634,546	626,304	615,335	628,743	**622,563**	-1.0%
6	Texas	624,390	619,088	616,779	614,616	595,934	599,567	597,428	622,184	596,830	577,174	**580,064**	0.5%
7	New York	529,732	528,094	519,066	508,536	497,975	494,020	485,541	479,161	475,689	467,828	**463,539**	-0.9%
8	South Carolina	383,971	380,314	397,458	416,763	436,075	442,040	436,844	435,528	435,491	447,745	**460,564**	2.9%
9	Ohio	413,276	413,048	414,938	412,375	412,256	415,228	416,586	424,877	430,710	432,696	**441,732**	2.1%
10	North Carolina	353,625	359,857	356,946	362,784	370,291	375,815	371,879	405,663	400,846	392,566	**391,711**	-0.2%
11	Illinois	398,431	360,252	393,856	380,865	383,615	379,454	378,208	373,530	370,522	371,365	**368,224**	-0.8%
12	Pennsylvania	357,729	355,235	354,079	349,159	344,190	342,427	338,316	337,747	365,872	331,590	**332,431**	0.3%
13	Georgia	325,135	326,718	322,252	318,212	336,579	344,597	350,479	352,054	353,950	322,346	**323,116**	0.2%
14	Louisiana	327,272	307,051	309,950	308,104	306,366	301,249	302,753	303,111	302,141	302,974	**305,081**	0.7%
15	Missouri	325,717	326,153	326,210	326,749	324,826	321,782	322,253	314,131	297,194	302,271	**300,714**	-0.5%
16	Alabama	264,191	262,249	264,006	265,172	271,658	274,176	272,558	270,726	271,377	265,526	**268,374**	1.1%
17	Tennessee	259,235	261,636	261,465	267,567	271,687	274,914	271,475	269,361	266,185	259,904	**259,632**	-0.1%
18	Virginia	243,590	241,993	242,642	245,073	248,091	251,440	249,312	249,235	245,940	242,473	**239,878**	-1.1%
19	Iowa	229,705	210,836	228,140	243,924	234,335	213,767	231,333	247,190	209,660	228,743	**235,095**	2.8%
20	Washington	266,717	265,773	266,056	267,793	270,627	270,789	264,393	269,845	237,921	234,543	**230,684**	-1.6%
21	Indiana	218,363	216,145	213,309	214,696	164,678	241,474	271,532	268,424	281,908	217,297	**214,487**	-1.3%
22	Oklahoma	228,064	229,778	206,049	216,913	216,556	223,758	196,052	205,079	209,457	199,337	**201,069**	0.9%
23	Arkansas	199,293	196,215	205,745	205,414	199,189	206,195	199,104	198,805	205,925	200,915	**199,546**	-0.7%
24	Maryland	198,012	198,395	206,681	205,812	204,277	202,892	199,087	196,806	193,259	188,623	**185,626**	-1.6%
25	Kentucky	173,900	173,418	174,463	176,257	177,951	176,716	173,981	176,535	175,863	171,936	**175,286**	1.9%
26	Oregon	194,691	197,591	190,119	187,640	186,497	184,147	180,063	180,552	177,634	171,983	**169,188**	-1.6%
27	New Jersey	209,419	207,588	209,678	199,106	205,967	183,147	185,359	173,994	169,750	166,037	**160,345**	-3.4%
28	Massachusetts	151,998	156,121	150,683	150,026	148,640	145,496	145,113	142,625	141,959	139,991	**139,123**	-0.6%
29	Mississippi	199,037	201,457	209,216	208,466	179,433	180,356	191,312	194,016	156,216	156,743	**133,556**	-14.8%
30	Arizona	147,829	147,213	147,294	148,343	145,023	144,570	140,291	136,463	135,326	131,665	**129,221**	-1.9%
31	Maine	119,243	90,604	94,582	111,756	113,276	112,818	109,657	109,169	111,873	106,679	**108,502**	1.7%
32	Connecticut	107,641	107,907	111,992	108,702	108,701	108,539	110,650	109,213	108,078	105,499	**103,992**	-1.4%
33	New Hampshire	101,638	100,835	101,626	102,268	101,297	100,261	96,205	95,402	94,773	91,950	**92,976**	1.1%
34	Colorado	101,957	100,575	98,079	98,512	98,067	98,055	95,330	95,822	91,424	89,321	**87,225**	-2.3%
35	Nebraska	75,927	75,763	77,636	82,921	83,313	83,722	83,280	80,089	83,832	84,471	**86,248**	2.1%
36	Kansas	101,858	100,463	98,512	97,748	95,677	93,900	91,067	90,522	89,315	88,041	**85,840**	-2.5%
37	Idaho	81,844	82,676	83,639	85,083	88,464	91,612	89,026	90,501	87,662	84,290	**85,749**	1.7%
38	Utah	78,887	76,178	74,293	75,635	76,481	76,921	73,009	72,419	70,321	68,427	**70,144**	2.5%
39	North Dakota	44,292	49,249	52,961	44,498	49,638	53,519	46,067	51,609	56,128	47,537	**62,799**	32.1%
40	Delaware	49,563	49,935	51,797	52,119	59,192	61,569	56,669	61,523	62,983	57,687	**58,541**	1.5%
41	South Dakota	52,066	53,469	51,604	53,038	53,430	53,570	56,604	60,094	56,624	56,615	**58,449**	3.2%
42	West Virginia	54,358	58,717	63,504	50,061	57,422	63,064	49,930	57,415	64,510	51,752	**57,085**	10.3%
43	Montana	51,269	53,384	59,271	70,616	81,935	79,651	84,988	83,394	52,105	42,985	**54,642**	27.1%
44	Nevada	60,210	58,580	57,612	57,726	59,957	59,895	57,519	56,053	53,464	50,864	**50,499**	-0.7%
45	Alaska	45,734	51,416	49,225	49,127	49,533	47,548	47,534	48,892	48,891	50,219	**50,142**	-0.2%
46	Rhode Island	42,474	43,007	43,671	43,656	43,375	43,665	42,524	42,519	45,930	40,989	**40,451**	-1.3%
47	New Mexico	41,430	40,294	38,439	38,863	38,794	38,100	33,304	36,544	37,340	37,469	**36,846**	-1.7%
48	Vermont	33,931	33,260	32,498	32,756	32,090	31,482	30,429	30,480	30,315	28,807	**28,987**	0.6%
49	Wyoming	28,322	25,725	25,897	26,270	26,296	26,956	27,243	27,955	28,249	28,164	**28,620**	1.6%
50	Hawaii	15,445	15,600	13,205	15,302	15,109	15,094	15,404	15,709	14,835	13,375	**14,098**	5.4%
51	Dist. of Columbia	1,909	2,152	2,908	2,528	2,425	2,866	2,922	2,798	3,017	2,889	**2,118**	-26.7%
	U.S. Territories	67,612	69,529	66,774	68,422	69,241	71,579	70,129	70,010	73,712	35,579	**38,435**	8.0%
TOTAL U.S.		**12,854,054**	**12,794,616**	**12,781,476**	**12,942,414**	**12,746,126**	**12,875,568**	**12,692,892**	**12,721,541**	**12,438,926**	**12,173,935**	**12,101,936**	**-0.6%**
PERCENT CHANGE		**-0.2%**	**-0.5%**	**-0.1%**	**1.3%**	**-1.5%**	**1.0%**	**-1.4%**	**0.2%**	**-2.2%**	**-2.1%**	**-0.6%**	

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Boat Type Definitions

BASS BOAT
Low freeboard boat, normally including forward flipping deck and stern casting platform; designed for day fishing in protected waters. Primarily equipped with outboard propulsion.

CENTER CONSOLE
Boat with the console station located on the centerline and generally designed for in-shore or off-shore fishing.

CONVERTIBLE
Boat with a mid-ships engine(s) location, primarily equipped for off-shore fishing, with the main control station traditionally located above the main cabin on a flying bridge and a large aft cockpit with low freeboard equipped with bait-wells, fish boxes, prep centers and storage areas designed for fishing. Typically, accommodations can support comfortable, extended cruising.

EXPRESS CRUISER
Boat primarily designed for cruising, characterized by a starboard side control station aft of the main cabin and a cockpit. Interior typically is an enclosed cabin with one or more berth/stateroom areas, one or more enclosed heads, a full galley and generally a dinette or other eating facility. Boat may be used for extended cruising.

FISH 'N SKI
Multi-use boat normally including forward flipping deck, stern casting platform and provision for a ski rope (via ski-tow eye or pylon); designed for day fishing or waterskiing in protected waters. This style is usually an optional version of another model.

FISHBOAT
Boats with stations aft of the main cabin, either on centerline or port/starboard side, and also on a tower. It may or may not have a windshield. The large cockpit is equipped with bait-wells, fish boxes and a prep center. Interior typically is an enclosed cabin with one stateroom area, one enclosed head, a full galley and generally a dinette or other eating facility.

FLYBRIDGE SEDAN
Boat designed for cruising or occasional fishing, with a control station located above the main cabin, in the main cabin or both and a cockpit. The bridge length is usually long and overhangs the cockpit on the aft end. Interior includes two levels—main salon (upper deck) and lower deck accommodations. Interior includes one or more berth/stateroom areas (usually in the lower deck area), one or more enclosed heads, a full galley and generally a dinette or other eating facility. Most flybridge sedans are equipped with straight-drive inboard propulsion (with only a few exceptions) located mid-ship under the main salon floor.

INFLATABLE BOATS
A boat that uses air-filled, supported fabric (woven, not film) as a means of structure and/or flotation. This air-filled, supported fabric can be the entire structure of the boat, or used in conjunction with wood, aluminum, fiberglass or other materials to provide added size, buoyancy and stability, e.g., RIBs—rigid hull inflatable boats.

JET DRIVE BOATS
Inboard water-jet powered boat designed and equipped for recreational and family use; can carry one or more persons in the interior of the boat.

JON BOATS
An aluminum outboard boat, typically a utility flat-bottom boat with small horsepower engine for shallow bay waters; may have a console for fishing.

KAYAKS
A canoe-style boat, designed for recreational or competitive use on inland lakes, streams and rivers, with a fully covered top, except for a small opening in the center for a single occupant. Propulsion is achieved with a double-ended paddle.

MOTOR YACHT (AFT CABIN)
Boat primarily designed for cruising, with a control station located above the main cabin, in a pilothouse section, or the salon, or a combination of two locations. Interior is characterized by a master stateroom and one or more guest staterooms, plus one or more enclosed heads, a full galley, a salon and a dining area. On a cockpit motor yacht, a short cockpit area is included in addition to the aft flush deck.

OPEN DECK BOATS (NO PONTOONS)
Monohull boat designed primarily for day use as an entertaining platform, or for waterskiing or fishing; also may contain small, enclosed head. Newer styles mimic bowrider runabouts, but with a taller profile and wider bow section.

OPEN DECK BOATS (WITH PONTOONS)
Multi-hull boat designed primarily for day use as an entertaining platform, or for waterskiing or fishing; also may contain small, enclosed head.

OPEN EXPRESS FISHBOAT
Boat primarily designed for off-shore fishing, characterized primarily by its "Carolina-style" aft freeboard and two-level cockpit (upper and lower deck). The control station is located aft of the main cabin, either on centerline or port/starboard side, and also on a tower. It may or may not have a windshield. The large cockpit is equipped with bait-wells, fish boxes and a prep center. The lower deck (cockpit) area is usually wide open and unobstructed. Interior typically is an enclosed cabin with one stateroom area, one enclosed head, a full galley and generally a dinette or other eating facility.

OTHER FISHBOAT

Pikeboat—high freeboard, v-hull, outboard powered boat designed for fishing in the northern lakes.

PERFORMANCE BOATS

Boat primarily designed for high-speed performance, characterized by a sleek, low-profile exterior, narrow beam and (usually) a deep dead-rise angle. The control station is aft of the main cabin and is either a cockpit or a flush aft deck. Interior typically is an enclosed cabin with one berth/stateroom area, one enclosed head, a full galley and generally a dinette or other eating facility. This category could include both monohulls and "cat" hulls.

RUNABOUT (BOWRIDER)

Boat typically designed with open bow seating and equipped primarily for daytime multi-recreational use. The starboard console consists of the control station and the port console typically has a glove box/cooler area. Some accommodations may be included.

RUNABOUT (CUDDY)

Boat with covered bow, equipped primarily for day multi-recreational use. May include minimal accommodations, such as vee berth, small galley unit and portable head for possible overnight use. Overall style parallels that of a bowrider but with a small cuddy cabin in place of the open bow.

TOURNAMENT SKI

Runabout designed and equipped for tournament and professional waterskiing. Main characteristics are low freeboard, fairly flat dead rise and inboard propulsion.

TRAWLER

Boat designed for extended cruising in comfort. Accommodations include one or more enclosed cabins, one or more enclosed heads, a large aft deck, a full galley and generally a dinette or other eating facility. The primary control station is provided on a bridge deck over the main salon, with an inside steering station often available in the main salon or a pilothouse. Hull is typically non-planing.

UTILITY

Dinghy, workboat or other craft, regardless of construction material, not classifiable in other reporting categories.

WALK AROUND

Boat primarily designed and equipped for recreational use or in-shore/off-shore fishing, with a center located cabin and side decks for access to the bow or cockpit. Boat has a conventional starboard or centerline control station. Cabin typically contains near-full headroom, an enclosed head and/or some form of galley.

Industry Statistical Reports

MSR (MONTHLY SHIPMENT REPORT)

A monthly trend report of industry wholesale shipments of outboard motors, boats, sterndrives, inboards, personal watercraft, jet drive boats, canoes and trailers. This valuable industry report shows current month, year-to-date and prior year comparisons of unit shipments and factory value by hull material, length and type of boat. Annual subscription costs: free to members providing underlying shipment data; $400 to non-data-contributing NMMA members (electronic distribution); non-members $1,800 per year.

QUARTERLY MARINE REGISTRATION REPORT

A quarterly report listing new powerboat registrations for outboard, sterndrive, inboard, jet drive boats and personal watercraft. The data is provided nationally and for nine U.S. regions and includes the current quarter, calendar year-to-date and rolling 12 month boats registered. Free to members providing underlying shipment data; non-data-contributing NMMA members part of MSR annual subscription; $500/non-members.

2010 U.S. BOATING REGISTRATION STATISTICS – DATA TABLES

A detailed, 89-page state-by-state analysis of boating registrations by boat segments, size, power and hull material. Regional summaries include population, income, shoreline and inland water data. First copy free to NMMA members; additional copies $125/members, $600/non-members.

MONTHLY INDUSTRY DASHBOARD REPORT

A 36-page report providing key monthly economic factoids along with traditional powerboat monthly wholesale and retail sales at category level. Annual subscription costs: free to all NMMA members; non-members $1,200 per year. Electric download file only.

List of Sources

ASA—American Sportfishing Association, Alexandria, VA

FR—Foresight Research, Rochester, MI

ILT—Info-Link Technologies, Miami, FL

ITR Economics—Institute for Trend Research, Boscawen, NH

LBM—Left Brain Marketing, Lenexa, KS

NAICS—North American Industry Classification System, Washington, D.C.

NMBA—National Marine Bankers Association, Chicago, IL

NMMA—National Marine Manufacturers Association, Chicago, IL

NOAA—National Oceanic & Atmospheric Administration

NSGA—National Sporting Goods Association, Mt. Prospect, IL

RMRC—Recreational Marine Research Center, East Lansing, MI

RSM McGladrey, Inc.—South Bend, IN

RVIA—Recreational Vehicle Industry Association, Alexandria, VA

SSI—Statistical Surveys Inc., Grand Rapids, MI

TCB—The Conference Board, New York, NY

TSC—The Sailing Company, Newport, RI

USCG—U.S. Coast Guard, Washington, D.C.

USDC/BEA—U.S. Department of Commerce, Bureau of Economic Analysis, Washington, D.C.

USDL—U.S. Department of Labor, Washington, D.C.

USFR—U.S. Federal Reserve, Washington, D.C.

USFW—U.S. Fish and Wildlife Services

USITC—U.S. International Trade Commission, Washington, D.C.

National Marine Manufacturers Association

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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