

MARINE ACCESSORIES & COMPONENTS DIVISION (MACD)

The National Marine Manufacturers Association (NMMA) is a unifying force and powerful voice for the recreational boating industry, working to strengthen and grow boating and shape public policy to protect the interests of NMMA'S 1,300 members.

600
MEMBERS

\$7.4
BILLION

SPENT ON ACCESSORIES
& COMPONENTS
PER YEAR

NMMA's 600 MACD member companies produce 80% of the marine components, electronics, accessories and trailers used by boaters and anglers in the U.S. and Canada.

TAKE ACTION

Advance boating's legislative agenda and trade policy to policymakers, the media and the public.

- BoatPAC—Political action committee
- American Boating Congress (ABC)—legislative conference
- Boating United—boating, angling & outdoor recreation

\$170
BILLION ANNUAL
ECONOMIC
IMPACT

691,149
AMERICAN JOBS

STAY INFORMED

Use NMMA's Business Intelligence market research and industry data to make informed business decisions.

- Sales data, boat registrations, wholesale shipments, etc.
- Analyze market trends and the competitive landscape
- *FREE* member access to publications which retail for \$8,000

62%
BOAT OWNERS HAVE AN ANNUAL
HOUSEHOLD INCOME
OF \$100K OR LESS

95%
OF BOATS ARE SMALL
TOWABLE
UNDER 26FT

PROMOTE BOATING

Increase boating participation, connect with new demographics, and attract the next generation of boaters.

- DiscoverBoating.com engages 4.5m visitors annually connecting consumers directly with manufacturers and dealers
- Access to research on first time boat buyers and marketing tools to engage new demographics and younger consumers

IN 2020, **30% OF ALL NEW BOAT BUYERS WERE FIRST TIME BUYERS, A POSITIVE TREND NMMA AND DISCOVER BOATING CONTINUE TO DRIVE**

GROW YOUR BUSINESS

Boat shows, industry trade events and resources help members sell more product and provide workforce benefits.

- 500,000+ visitors attend NMMA's 14 major market boat shows annually
- IBEX trade event connects OEM with boat builders
- Member only access to quality healthcare, 401k planning, B2B directories and product certification

141.6
MILLION AMERICANS
GO BOATING
EACH YEAR

\$47
BILLION BOATING
RELATED
EXPENDITURES

NMMA members are vested industry stakeholders driving the association's strategic initiatives to advocate for marine businesses and recreational boaters while working to expand the market.

NMMA works on behalf of our members to help shape both state and federal public policy and to keep members educated about government decisions that can affect their businesses. NMMA staff advocate daily with members of Congress to address critical issues impacting marine manufacturers and consumers.

NMMA public outreach efforts focus on driving demand for recreational boating and positioning the industry for long-term growth. Discover Boating and our 14 boat shows deliver positive, engaging consumer experiences that connect with new, diverse demographics and first-time buyers to expand the market.

NMMA membership can give your business a clear advantage, connecting you with information, resources, programs and service vital to success in today's fast-paced, ever-changing global economy.

COST EFFECTIVE BENEFITS

- 5 to 20 percent member booth space discounts at select NMMA boat shows and International Boatbuilders' Exhibition and Conference (IBEX) as well as preferred member space allocation
- Free access to NMMA's Business Intelligence marine market research and publications including the *U.S. Recreational Boating Statistical Abstract*— the industry's most comprehensive summary of boating statistics, which retails for \$4,199
- Free NMMA boat show credentials for member staff (\$50 value each) with exclusive access two hours prior to show opening
- Significant discounted rates on UPS, rental cars, office supplies and equipment, printing services, utility contract analysis
- Discounts on NMMA advertising which reaches a highly targeted audience of industry stakeholders and decision makers

EXCLUSIVE MEMBER'S ONLY RESOURCES

- Marine Industry Retirement Plan, a customizable multiple employer 401(k), provides flexible and competitive plan options while lowering administrative expenses and participant fees
- Access to quality, ACA-compliant healthcare through NMMA's partnership with the National Association of Manufacturers— NAM Healthcare is available to U.S. based manufacturing members with less than 99 employees
- Advocacy support from NMMA experts on regulatory policy and trade and tariff challenges, as well as timely economic news and compliance alerts to monitor the ever-changing business climate
- Member B2B Directory, a trade-only marketplace connecting buyers and suppliers with member-only access to sales contacts including email and phone
- Expert advice and technical support on manufacturing compliance standards and industry regulatory requirements

BENEFIT QUESTIONS | MEMBER'S ONLY ACCESS | HOW TO GET INVOLVED:

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Director, Member Services

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Direct: 312.946.6276

nmma.org | DiscoverBoating.com | boatshows.com | ibexshow.com

NMMA ACCOMPLISHMENTS, RESOURCES AND PRIORITIES

2020 RECAP

While 2020 was a year of change and disruption, NMMA worked to protect our members interests, amplify the voice of the industry to policymakers and educate the public about the benefits of boating.

Interest in outdoor recreation surged during the pandemic, boosting boat sales and participation, and attracting a younger more diverse audience.

As boaters and the industry evolve post-pandemic, NMMA stands ready to meet the challenges, promises and opportunities ahead for recreational boating.

BUSINESS INTELLIGENCE REPORT

Strengths

- New boat sales reached a 13-year high—more than 310,000 new boats were sold
- Boating-related expenditures reached a record \$47 billion
- 30% of all new boat buyers in 2020 were first-time buyers—more than 100k people
- Significantly younger: first-time buyers were on average 5 years younger than experienced boaters

Challenges

- 20% average decrease in boat manufacturer inventory levels from 2019
- 95% of boat builders reported an average 6 month of backorders



2021 NMMA CORE INDUSTRY INITIATIVES

ADVOCACY

A new congress and administration, as well as new state, local and international governments mean 2021 offers both opportunities to capitalize on and challenges to address.

2020 ADVOCACY WINS

- Delivered \$100 million in Paycheck Protection Program funding
- Passed Great American Outdoors Act, investing billions in outdoor recreation access projects
- Secured mandatory wear of engine cutoff devices
- Ensured \$850 million for Everglades and Great Lakes restoration
- Provided \$25 million in tariff relief

2021 NMMA CORE INDUSTRY INITIATIVES (CONTINUED)

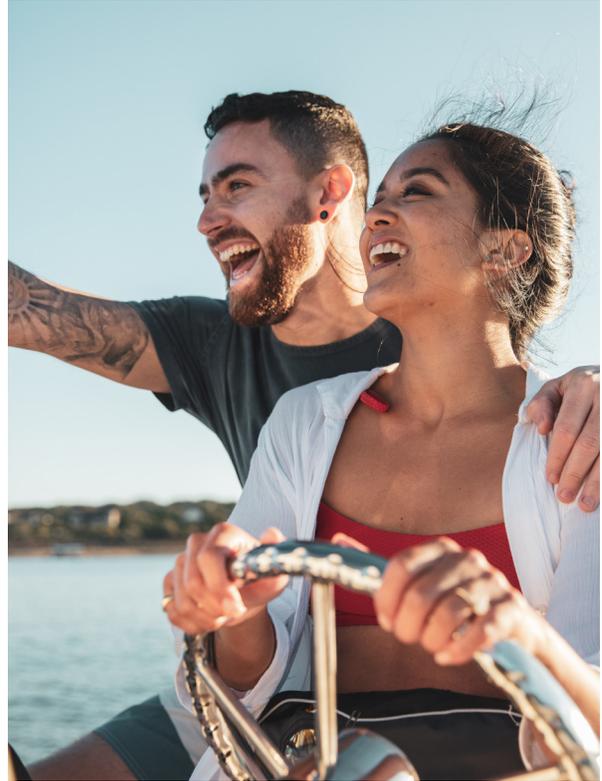
2021 ADVOCACY PRIORITIES

- Introduce the recreational boating community to the 117th Congress and new administration
- Eliminate the E.U.'s 25% tariff and American boats and engines
- Provide COVID-19 economic relief for marine businesses, including business liability protections, increased testing, and state agency funding
- Protect and modernize conservation programs
- Increase funding for boating access and infrastructure projects
- Defeat harmful legislation and regulations, including business and environmental regulation and increased scrutiny of corporate social responsibility practices
- Defeat attempts to restrict boating access and activities

MARKET EXPANSION 2021

NMMA's market expansion efforts will focus on the unification of the industry's marketing campaigns and the rebranding of the NMMA boat shows under the Discover Boating banner for 2022.

Discover Boating will again partner with Take Me Fishing, with a relaunch of last year's successful Get On Board campaign in the spring. The partnership also includes a retention tool kit for industry stakeholders featuring articles, tips, social media and imagery.



DISCOVER BOATING: FY 2021

2021 is off and running, reaching out to the public via content, PR, email and more

- 1MM+ visitors to DiscoverBoating.com—up 60% year-over-year
- 360K referrals—up 3% year-over-year
- Instagram engagements up 544% year-over-year
- Attracting the next generation of boaters: ages 25–34 up 27% year-over-year, 18–24 up 105% year-over-year and women up 80% year-over-year

BOAT SHOWS

NMMA is committed to boat shows and expect to be back 100% in the fall of 2021 and resume our full schedule of shows in 2022.