

2012  
**RECREATIONAL  
BOATING**  
Statistical Abstract



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The *2012 Recreational Boating Statistical Abstract* is a comprehensive summary of statistics on the recreational boating industry in the United States. It presents data collected by the National Marine Manufacturers Association (NMMA) through 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, practical data and analysis of the marine marketplace.

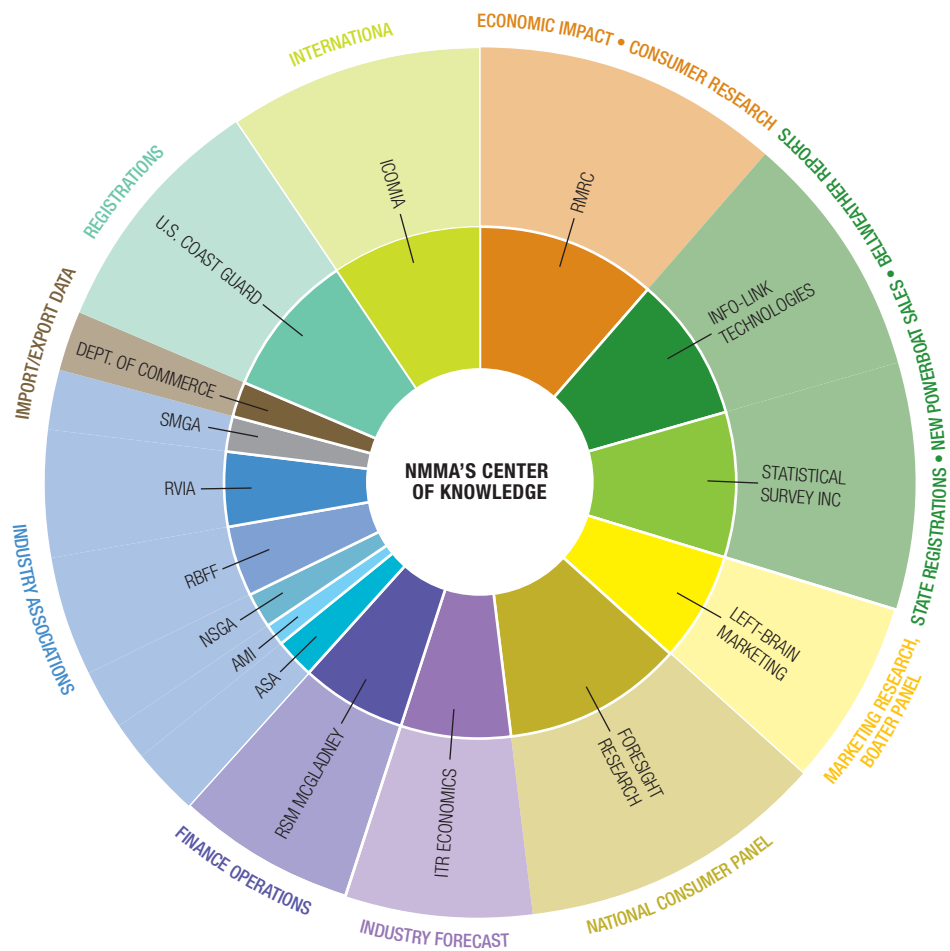
The report presents detailed data on boat registrations, sales, expenditures, participation and the retail market. Boating Population includes boating participation, ownership, usage and behavior data from boater participation and boat owner surveys conducted by Foresight Research in late 2012. The Import/Export section features an in-depth look at the import/export marketplace focusing on product categories, trade partners and regional analysis.

This edition also includes the results of a consumer survey conducted by Foresight Research in 2011 on boaters’ marine accessory spending habits (Section 18).

NMMA’s Industry Statistics & Research Department analyzed and formatted all data in this report. The complete list of sources can be found on page 338.

## 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 is an important contributor to the U.S. economy, generating \$35.6 billion in direct sales of products and services in 2012, a 10 percent increase from 2011.

Total boat and engine sales reached \$20.6 billion in 2012.

New boat and engine sales totaled \$8.86 billion; of this traditional powerboat sales (outboard, inboard, sterndrive and jet boats) totaled \$5.84 billion, other boat sales totaled \$96 million and outboard engine sales totaled \$2.06 billion.

Pre-owned boat and engine sales totaled \$11.74 billion, with sales distributed as follows: traditional powerboats totaled \$8.92 billion, other boats totaled \$89 million and outboard engines totaled \$1.93 billion.

Of the 232.3 million adults living in the United States in 2012, 37.8 percent, or 88 million people, participated in recreational boating, a six percent increase from 2011. This is the largest percentage of participation in recreational boating among the U.S. adult population since NMMA began collecting participation data in 1990.

There were 1,167,900 pre-owned and new powerboats (outboard, inboard, sterndrive, jet, personal watercraft and inflatable) and sailboats sold in 2011, a 3.7 percent increase compared to 2011. There were 969,000 pre-owned boats sold in 2012, a 6.0 percent increase compared to 2011. Eighty-three percent of boats sold in 2012 were pre-owned. Ninety-three percent of the new traditional powerboats sold in the U.S. were made in the U.S. unit sales of new power- and sailboats totaled 228,245 in 2012, a 6.5 percent increase, compared to 2011.

In the new boat market, unit sales increased in the following segments: jet boats (up 36 percent), sailboats (up 29 percent), inboard/ski/wakeboard boats (up 13.4 percent), outboard boats (up 11.3 percent), kayaks (up two percent) and canoes (up one percent).

Sales of new boat trailers were up 8.6 percent from \$122 million in 2011 to \$133 million in 2012, corresponding unit sales totaled 77,400, up nearly two percent from the previous year.

Outboard boats dominated pre-owned unit sales with a 60 percent share of the market.

Aftermarket accessory sales totaled \$5.6 billion in 2012. Per boat spending for the year averaged \$352 (all boats). During 2012, 78% of boat owners purchased at least one marine accessory, up from 75% in 2011. (Accessories include navigation equipment (i.e., GPS), electronics, covers/tops, safety gear, maintenance and repair, dockside equipment like ropes and buoys, fishing and watersports gear, etc.)

Boaters spent five percent less on operating costs (insurance, docking, storage, marina fees, fuel, maintenance, and taxes) in 2012 than in 2011, these expenses fell from a total of nearly \$9.8 billion in 2011 to \$9.27 billion in 2012.

Fuel costs led owners' expenditures totaling \$2.7 billion in 2012, a 24 percent decrease from 2011. Two factors drove this decrease: the cost of fuel and the number of days spent boating. The average price of fuel fell 3.2 percent, from \$3.70 per gallon in 2011 to \$3.58 per

gallon in 2012. Powerboaters also used their boats less; the average number of days boats were in operation decreased from 31 days in 2011 to 26 days in 2012. Repair/service costs totaled nearly \$2.62 billion in 2012 and marina and storage costs totaled \$1.97 billion.

## Total Boat Sales (Section 5)

There were 546,395 new boats sold in 2012, an increase of four percent compared to 2011, with a total retail value of \$6.8 billion, an increase of 12 percent from 2011. (Table 5.2)

Total pre-owned boat sales reached 969,400 units in 2012, a 6.5 percent increase compared the prior year; corresponding value totaled \$9.8 billion, up eleven percent compared to 2011.

Demonstrating the seasonality of new boat retail sales, 58 percent of new powerboats registered in 2012 were recorded during April, May, June and July. Wholesale shipments were spread more evenly throughout the year. (Table 5.4)

## Total New and Pre-Owned Powerboat Sales (Section 5)

Retail sales for both new and pre-owned traditional powerboats (outboard, inboard, sterndrive and jet boats) totaled \$14.8 billion in 2012, a 13 percent increase compared to 2011.

New traditional powerboat sales totaled 157,350 units in 2012, an increase of 10 percent from 2011, and comprised 16 percent of total powerboat sales, relatively unchanged from 2011.

Pre-owned traditional powerboat sales totaled 805,600 units, a seven percent increase from 2011.

## Estimated average price of boats (Sections 3, 4, 5)

The average retail price of a new traditional powerboat (outboard, inboard, sterndrive, jet boat) in 2012 was \$37,140, up four percent from 2011.

The average price of a pre-owned traditional powerboat in 2012 was \$13,771, a 4.7 percent increase from 2011.

Pre-owned boats accounted for 83 percent of all power- and sailboats sold (by volume) in 2012, a two percent greater share of the market than in 2011. In terms of dollar value, pre-owned boats accounted for 59 percent of the total spent on power-and sailboats in 2012.

## Boater Demographics (Section 1)

Boating remains a middle-class recreational activity. Eighty-one percent of adults who went boating in 2012 had a household income less than \$100,000; sixty-five percent had a household income less than \$75,000. (Only 16 percent had a household income of \$100,000 or greater.)

Boating participants were more likely to be male (58 percent), younger than age 50 (74 percent) and have a household income of \$50,000–\$99,999 (41 percent).

Approximately seven percent of boating participants were age 65 or older and 10 percent were retired. Eight percent of boating participants were Hispanic and 10 percent were African American.

## Boating Participation (Section 1)

Of the 232.3 million adults living in the United States in 2012, 37.8 percent, or 88 million people, participated in recreational boating, a six percent increase from 2011. (Table 1.1)

The total number of boats in use in 2012 increased slightly more than three percent or 510,000 vessels. It is estimated that 16.67 million boats were in use during 2012 compared to 16.16 million in 2011. (Table 1.2)

The Great Lakes region was again home to the greatest number of recreational boaters in 2012; approximately two out of ten participants, or 18 million boaters, lived there in 2012. (Table 1.8)

Persons who boated as children are more likely to boat as adults; nearly 70 percent of participants in 2012 boated as children. (Table 1.9.1)

Outboard boats were the most popular type of recreational boat in use for the sixteenth consecutive year; 49 percent of the nearly 16.7 million boats on the water in 2012 were outboard boats. (Table 1.3)

## Boat Registrations (Section 6)

Boat registrations were down nearly two percent in 2011, falling to a total of 12.2 million, compared to 12.4 million the previous year.

Florida led all states in boat registrations for 2011, followed by California, Minnesota, Michigan and Wisconsin, in that order.

The top 20 states represented 75 percent of all boats registered in the United States.

Ninety-three percent of all boats registered in 2011 were mechanically powered, i.e. powerboats or auxiliary sailboats; this market share has remained constant since 2002.

Nearly one in three powerboats registered in 2011 were smaller than 16 feet in length; the majority of these craft were aluminum outboard boats.

Nearly three out of five of powerboats registered in 2011 had fiberglass hulls; thirty- nine percent had aluminum hulls.

## New Powerboat Sales by State (Section 5)

Florida again ranked first, with total new powerboat, motor, trailer and accessory sales reaching nearly \$1.7 billion, an increase of nearly 15 percent compared to 2011. Texas, Michigan, Minnesota and New York rounded out the top five states, respectively. (Table 5.6)

The top 20 states accounted for 73 percent of the total spent on new powerboats, outboard engines, trailers and accessories in 2011. (Table 5.7)

Sales increased in each of the top 20 states: Michigan, Wisconsin, Virginia, Minnesota, and South Carolina each recorded gains of more than 30 percent, up 42 percent, 37 percent, 36 percent, 34 percent and 32 percent, respectively.

New Jersey fell out of the top 20 and Virginia was added.

## Imports and Exports (Section 7)

The number of recreational boats exported in 2012 increased for the third consecutive year, up 1.4 percent to a four-year high total of nearly 130,569 units of which 36,265 were traditional powerboats (inboard-, outboard-, and sterndrive-propelled) , 35,222 were rowboats/canoes and 51,989 “other”, which includes PWCs, 4,695 inflatable boats and 2,398 sailboats. Gains in the export of “other” boats (up 16.6 percent), outboard boats (up 15.5 percent), and sterndrive boats (up 7.6 percent) were offset by declines in all other categories.

A total of 183,205 powerboats were manufactured in the United States in 2012; Twenty percent were exported to other countries.

A record-high 301,000 boats were imported in 2012; of these nearly four out of five were canoes. Traditional powerboats (inboard-, outboard-, and sterndrive-propelled) contributed 10,500 units to the import total, about one quarter less than the 17-year average of 14,000 units.

Since 2007, there has been a positive balance in U.S. trade of recreational boats and marine engines; the balance totaled \$275 million in 2012, down nearly 23 percent from the previous year. In terms of value, boats comprised 70 percent of total exports and 54 percent of total imports.

Export value of boats and engines totaled \$2.24 billion in 2012, up 2.9 percent from 2011.

Recreational boat and marine engine exports to Canada (\$690 million or 31 percent), Latin America, i.e. Mexico, Central America/Caribbean and South America (\$553 million or 25 percent), Western Europe (\$391 million or 17 percent) and Australia/Pacific Islands (\$239 million or 11 percent) accounted for 84 percent of total U.S. marine exports. NAFTA trading partners, Canada and Mexico, accounted for more than one in three of the market's export dollars. Latin America continued to grow in importance as a trading partner; exports to the region increased 26 percent in 2012 compared to 2011.

Import value of boats and engines totaled \$1.97 billion, an increase of nearly eight percent from 2011.

Nearly half (48 percent) (\$953 million) of all boat and engine imports in 2012 were from Asia, followed by Western Europe (28 percent or \$506 million), Canada (15 percent or \$272 million) and Latin America (seven percent or \$138 million).

The purchasing power of the U.S. dollar slightly weakened against the Canadian dollar and Euro in 2012. The dollar dropped three cents on the Canadian dollar, but was still below the 16-year average of CAD1.27. The dollar also dropped one cent on the Euro, was nine cents above the record low in 2007, but still below the 14-year average of €0.85.

## Boating and the Economy (Section 2)

The RV market grew for a third consecutive year, with retail sales up 7.2 percent to 209,000 units, approximately 100,000 units less than pre-recession levels.

On a rolling 12-month basis, the rate of change in light vehicle sales ended the year up 12.6 percent. Traditional powerboat retail sales continued to trend upward through 2012, ending the year up 10.2 percent.

Consumer confidence averaged 67.1 in 2012, ending the year at 66.7. While consumer confidence has improved steadily since the recession (average readings for 2011: 58.1, 2010: 54.6, 2009: 45.2), it remains relatively mediocre, far from pre-recession levels in the 100+ range.

Fishing license sales increased 3.3 percent in 2012 to a total of 29.3 million units.

Fishing tackle sales grew for the second consecutive year, forecasted at \$2.1 billion in 2011, while sales were up 13 percent from the record low \$1.9 billion in 2009.



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# ACCESSORY STUDY



This section offers a snapshot of the boat accessory market, featuring data from a study conducted by Foresight Research for NMMA. The research sheds light on the boating accessory purchase behavior patterns of boat owners.

The study investigated accessory purchase behavior of both existing and recent boat owners. The study also differentiated between buyers of new and pre-owned boats and examined behavior both before and after boat delivery.

The study addressed the following topics:

- Accessory purchases by category during 2012 among all boat owners
- Type of purchase—add-on, Repair/replacement, or upgrade by category
- Seasonal buying patterns for add-on, Repair/replacement and upgrade purchases
- Total spending on accessories for 2012 and distribution between add-on, Repair/replacement and upgrade purchases
- Where purchases were made and who performed installation
- How consumers became aware of accessories available for their boat
- The role accessories played in a boat buyer's choice of a dealer, broker or retailer
- New for 2012—data for estimated spending by category was collected
- Comparison of 2012 accessory spending to 2011, and projected 2013 spending

Source data/methodology: Foresight Research conducted the research via an Internet web panel for NMMA in November 2011. A nationally representative sample of 3,000 boat owners was surveyed. Respondents were screened for sensitive occupations, boat decision maker and current recreational boat ownership.

To ensure the results were representative of the boat-owning population, survey responses were weighted using NMMA-provided market share data:

- 90% of all boats in operation are “existing” (i.e., bought more than 18 months ago)
- 8% are purchased used
- 2% are purchased new

Analysis covered twenty boat accessory categories, with examples included for each.



# SUMMARY

Boating accessories are an integral part of the boat purchasing process, both before and immediately after purchase

- Salespeople, dealership displays, boat brochures and boat shows are important sources of awareness for accessories
- Dealership/retailer selection is influenced by the availability of accessories

During 2012, 78 percent of all boat owners purchased at least one marine accessory, compared to 75 percent during 2011.

Boat owners who purchased accessories during 2012 spent \$1,165 on average, compared to \$821 during 2011. While spending increased in all segments, there were marked differences in the amount spent on accessories among the ownership segments identified in the study: new boat buyers spent an average of \$2,572 (an increase of \$495 from 2011)—significantly more than existing owners who spent \$1,121 on average (a \$357 increase from 2011), and pre-owned buyers who spent \$1,220 (a \$183 increase from 2011).

On average, boat owners (power and sailboat combined) spent \$882 on Repair/replacement and upgrade products in 2012, compared to \$592 the previous year. Based on a total of 10.4 million power and sailboats in the U.S. for which Repair/replacement/upgrade purchases were made, aftermarket accessory sales in 2012 totaled an estimated \$5.6 billion, compared to \$4.0 billion in 2011.

The percentage of boat owners identified as accessory “big spenders” (i.e., spent more than \$1,000 on accessories during the year) grew from 14 percent in 2011 to 23 percent in 2012. As a group, this segment spent on average \$3,064 in 2012, versus \$2,442 in 2011.

By boat category, average spending on accessories increased the most for inboard boat owners, followed by fiberglass outboard boat owners and sterndrive boat owners.

Purchase frequency increased two to four percent for the top accessory categories: safety, boat maintenance & repair, engine maintenance & repair, anchoring & mooring and covers & tops. In fact, during 2012 purchase frequency did not decline for any of the twenty categories of accessories examined in this study. On average, boat owners purchased accessories from 2.93 accessory categories in 2012 versus 2.62 in 2011.



# SUMMARY

In terms of average yearly expenditures, the top categories (among those who purchased in that category) were: dock installation/dockside equipment (\$998), navigation instruments (\$563), heating and cooling (\$554), entertainment electronics (\$488), covers and tops (\$473) and navigation electronics (\$453). The most frequently purchased accessories were safety items, boat maintenance & repair and engine maintenance & repair, in that order; average spending for these categories totaled, \$164, \$251, and \$307, respectively.

Consistent with 2011 results, nearly half (48 percent) of boat owners who recently purchased a new or pre-owned boat purchased accessories prior to delivery of their boat. Sales staff were cited most frequently as a source of information for accessories (43 percent) followed by dealership display (27 percent), boat shows (26 percent), boat brochure (19 percent) and the Internet (15 percent) (excludes prior experience and word of mouth). Nearly all new boat buyers (85 percent) and most (76 percent) pre-owned boat buyers purchased accessories within six months of their boat's delivery, with the greatest percentage of purchases taking place in the first two months.

Slightly fewer people opted to install accessories themselves: 70 percent chose the do-it-yourself route in 2012, compared to 75 percent in 2011. Installation services increased at marinas, dealerships and retailers and marinas, up 4.2 percent, 2.5 percent and 1.6 percent, respectively.

The choice of retail outlet varies with accessory category. For example, safety items were most often purchased at marine specialty stores (27 percent) and mass merchandisers (28 percent). Covers and tops were most often purchased at a boat dealer (24 percent), while fishing hardware was most often purchased at outdoor outlets (38 percent).

Not surprisingly, boat owners shopped for accessories (all categories) most frequently at marine specialty stores, boat dealerships and the Internet; boat shows and marinas were the least frequented retail outlets. Safety items and navigation electronics sold best at boat shows, while boat and engine maintenance and repair products sold best at marinas.

## 18.1 Buying Behavior

SOURCE: FORESIGHT RESEARCH INC.

### 18.1a Outlet where most recent boat was purchased

**Respondents who had bought a boat within the last 18 months were asked where it was purchased.**

More than 8 of 10 boat owners who purchased a new boat within the last 18 months bought it from a dealer or other authorized retailer; conversely, more than 8 of 10 boat owners who purchased a pre-owned boat in the past 18 months bought it from an individual.

78% of boat owners purchased boating accessories during 2012. Among boat owners who purchased boating accessories, 5 of 10 spent \$500 or less, 3 of 10 spent more than \$1,000 and 2 of 10 spent between \$500 and \$1,000.

**TABLE 18.1a**

|                           | OWNERSHIP 2011 SURVEY |               |                     |                     | OWNERSHIP 2012 SURVEY |               |                     |                     |
|---------------------------|-----------------------|---------------|---------------------|---------------------|-----------------------|---------------|---------------------|---------------------|
|                           | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER |
| n=                        | 3,000                 | 60            | 240                 | 2,700               | 3,039                 | 61            | 244                 | 2,734               |
| Individual                | 48.6%                 | 13.9%         | 81.1%               | 46.5%               | 45.4%                 | 12.4%         | 82.7%               | 42.8%               |
| Dealer                    | 45.6%                 | 78.2%         | 12.0%               | 47.9%               | 48.8%                 | 81.2%         | 11.8%               | 51.4%               |
| Broker                    | 2.6%                  | 1.5%          | 5.1%                | 2.4%                | 2.9%                  | 1.5%          | 4.0%                | 2.8%                |
| Other authorized retailer | 3.2%                  | 6.3%          | 1.8%                | 3.2%                | 2.9%                  | 4.9%          | 1.5%                | 3.0%                |
| <b>TOTAL</b>              | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       |

|                           | BOAT TYPE 2011 SURVEY |                     |               |               |                       | BOAT TYPE 2012 SURVEY |                     |               |               |                       |
|---------------------------|-----------------------|---------------------|---------------|---------------|-----------------------|-----------------------|---------------------|---------------|---------------|-----------------------|
|                           | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER |
| n=                        | 1,260                 | 852                 | 477           | 375           | 36                    | 1,276                 | 863                 | 483           | 380           | 36                    |
| Individual                | 49.0%                 | 56.3%               | 38.0%         | 42.9%         | 51.9%                 | 49.9%                 | 46.2%               | 32.1%         | 44.0%         | 65.4%                 |
| Dealer                    | 46.4%                 | 37.8%               | 55.7%         | 50.0%         | 24.6%                 | 46.0%                 | 48.2%               | 61.3%         | 46.7%         | 16.4%                 |
| Broker                    | 1.0%                  | 1.9%                | 4.1%          | 5.7%          | 23.5%                 | 1.3%                  | 2.1%                | 4.0%          | 6.7%          | 18.1%                 |
| Other authorized retailer | 3.5%                  | 4.1%                | 2.1%          | 1.3%          | 0.0%                  | 2.8%                  | 3.5%                | 2.6%          | 2.6%          | 0.1%                  |
| <b>TOTAL</b>              | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         |

|                           | 2011 SURVEY PURCHASED ACCESSORIES |               | 2012 SURVEY PURCHASED ACCESSORIES |               |
|---------------------------|-----------------------------------|---------------|-----------------------------------|---------------|
|                           | YES                               | NO            | YES                               | NO            |
| n=                        | 2,247                             | 753           | 2,374                             | 665           |
| Individual                | 48.1%                             | 50.1%         | 44.5%                             | 48.9%         |
| Dealer                    | 46.0%                             | 44.5%         | 48.7%                             | 49.2%         |
| Broker                    | 2.7%                              | 2.4%          | 3.5%                              | 0.5%          |
| Other authorized retailer | 3.2%                              | 3.0%          | 3.3%                              | 1.4%          |
| <b>TOTAL</b>              | <b>100.0%</b>                     | <b>100.0%</b> | <b>100.0%</b>                     | <b>100.0%</b> |

|                           | AMOUNT SPENT 2011 SURVEY |               |               | AMOUNT SPENT 2012 SURVEY |               |               |
|---------------------------|--------------------------|---------------|---------------|--------------------------|---------------|---------------|
|                           | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      |
| n=                        | 1,468                    | 355           | 551           | 1,184                    | 479           | 708           |
| Individual                | 48.5%                    | 52.0%         | 46.6%         | 50.9%                    | 40.5%         | 36.3%         |
| Dealer                    | 46.4%                    | 41.4%         | 47.3%         | 45.3%                    | 50.5%         | 53.8%         |
| Broker                    | 1.5%                     | 4.0%          | 4.5%          | 1.6%                     | 5.1%          | 5.1%          |
| Other authorized retailer | 3.7%                     | 2.7%          | 1.6%          | 2.2%                     | 3.9%          | 4.8%          |
| <b>TOTAL</b>              | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> |

## 18.1b Timing of new accessory purchase in relation to boat delivery

**Respondents were asked if they had purchased any new accessories prior to the delivery of the last boat purchased. (Base: Did not purchase from an individual.)**

More than half of boat owners (52%) did not purchase new accessories for their last boat prior to taking delivery.

Boat owners who purchased a new boat within the last 18 months were more likely to purchase new boating accessories before it was delivered; nearly 7 of 10 (68.6%) purchased accessories prior to delivery.

Among those who had purchased a boat within the last 18 months, there were marked differences in the timing of accessory purchases between new and pre-owned boat owners: 68.6% of those who had purchased a new boat purchased accessories before it was delivered, compared to 42.2% for those who had purchased a pre-owned boat.

**TABLE 18.1b**

|              | OWNERSHIP 2011 SURVEY |               |                     |                     | OWNERSHIP 2012 SURVEY |               |                     |                     |
|--------------|-----------------------|---------------|---------------------|---------------------|-----------------------|---------------|---------------------|---------------------|
|              | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER |
| n=           | 3,000                 | 60            | 240                 | 2,700               | 1,658                 | 53            | 42                  | 1,562               |
| Yes          | 47.1%                 | 66.8%         | 44.5%               | 46.4%               | 48.0%                 | 68.6%         | 42.2%               | 47.4%               |
| No           | 52.9%                 | 33.2%         | 55.5%               | 53.6%               | 52.0%                 | 31.4%         | 57.8%               | 52.6%               |
| <b>TOTAL</b> | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       |

|              | BOAT TYPE 2011 SURVEY |                     |               |               |                       | BOAT TYPE 2012 SURVEY |                     |               |               |                       |
|--------------|-----------------------|---------------------|---------------|---------------|-----------------------|-----------------------|---------------------|---------------|---------------|-----------------------|
|              | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER |
| n=           | 1,260                 | 852                 | 477           | 375           | 36                    | 640                   | 464                 | 328           | 213           | 13                    |
| Yes          | 47.2%                 | 45.2%               | 55.1%         | 39.5%         | 39.8%                 | 46.2%                 | 52.7%               | 46.4%         | 46.6%         | 30.3%                 |
| No           | 52.8%                 | 54.8%               | 44.9%         | 60.5%         | 60.2%                 | 53.8%                 | 47.3%               | 53.6%         | 53.4%         | 69.7%                 |
| <b>TOTAL</b> | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         |

|              | 2011 SURVEY PURCHASED ACCESSORIES |               | 2012 SURVEY PURCHASED ACCESSORIES |               |
|--------------|-----------------------------------|---------------|-----------------------------------|---------------|
|              | YES                               | NO            | YES                               | NO            |
| n=           | 2,247                             | 753           | 1,318                             | 340           |
| Yes          | 47.3%                             | 46.4%         | 51.1%                             | 36.0%         |
| No           | 52.7%                             | 53.6%         | 48.9%                             | 64.0%         |
| <b>TOTAL</b> | <b>100.0%</b>                     | <b>100.0%</b> | <b>100.0%</b>                     | <b>100.0%</b> |

|              | AMOUNT SPENT 2011 SURVEY |               |               | AMOUNT SPENT 2012 SURVEY |               |               |
|--------------|--------------------------|---------------|---------------|--------------------------|---------------|---------------|
|              | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      |
| n=           | 1,468                    | 355           | 551           | 582                      | 285           | 451           |
| Yes          | 46.3%                    | 48.0%         | 52.3%         | 44.2%                    | 52.2%         | 59.3%         |
| No           | 53.7%                    | 52.0%         | 47.7%         | 55.8%                    | 47.8%         | 40.7%         |
| <b>TOTAL</b> | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> |

## 18.1c Information resources

### Respondents were asked how they learned about new boating accessories purchased prior to taking delivery of most recent boat.

Salesperson was the most frequently cited source of information: more than 4 of 10 boat owners said they learned about the accessories they purchased from a salesperson. First-hand knowledge of accessories was the second most frequently cited resource; 28% of boat owners had prior experience/owned the accessories they purchased.

New boat buyers cited salespersons as an information source more frequently than did pre-owned boat buyers: 44.5% compared to 32%.

**TABLE 18.1c**

|                                    | OWNERSHIP 2011 SURVEY |               |                     |                     | OWNERSHIP 2012 SURVEY |               |                     |                     |
|------------------------------------|-----------------------|---------------|---------------------|---------------------|-----------------------|---------------|---------------------|---------------------|
|                                    | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER |
| n=                                 | 3,000                 | 60            | 240                 | 2,700               | 795                   | 37            | 18                  | 741                 |
| Salesperson                        | 44.9%                 | 43.6%         | 27.2%               | 45.5%               | 43.3%                 | 44.8%         | 32.0%               | 43.5%               |
| Prior experience/owned             | 27.7%                 | 19.3%         | 35.0%               | 27.9%               | 28.4%                 | 21.0%         | 27.2%               | 28.8%               |
| Display in the dealership/retailer | 22.6%                 | 27.0%         | 12.0%               | 22.7%               | 26.5%                 | 28.2%         | 24.7%               | 26.4%               |
| Boat show                          | 21.2%                 | 21.7%         | 12.3%               | 21.5%               | 25.9%                 | 15.7%         | 15.5%               | 26.6%               |
| Saw accessories on other boats     | 20.0%                 | 17.0%         | 18.2%               | 20.2%               | 24.4%                 | 16.5%         | 33.5%               | 24.6%               |
| Boat brochure                      | 19.5%                 | 30.1%         | 12.9%               | 19.1%               | 18.9%                 | 23.9%         | 12.7%               | 18.8%               |
| Magazine                           | 11.5%                 | 15.4%         | 8.7%                | 11.4%               | 12.5%                 | 13.1%         | 9.0%                | 12.5%               |
| Friends/relatives                  | 10.9%                 | 21.8%         | 17.3%               | 10.1%               | 17.9%                 | 20.9%         | 14.9%               | 17.9%               |
| Aftermarket catalog                | 10.2%                 | 16.7%         | 12.6%               | 9.7%                | 8.3%                  | 13.8%         | 9.4%                | 8.0%                |
| Website/Internet                   | 8.8%                  | 27.3%         | 17.1%               | 7.6%                | 14.6%                 | 23.6%         | 20.2%               | 14.0%               |
| Newspaper                          | 1.9%                  | 5.2%          | 2.5%                | 1.8%                | 0.9%                  | 2.3%          | 1.2%                | 0.8%                |
| Television                         | 1.5%                  | 3.5%          | 3.9%                | 1.4%                | 1.4%                  | 2.2%          | —                   | 1.4%                |
| Other                              | 1.7%                  | —             | —                   | 1.8%                | 1.4%                  | 0.2%          | —                   | —                   |

|                                    | BOAT TYPE 2011 SURVEY |                     |            |         |                       | BOAT TYPE 2012 SURVEY |                     |            |         |                       |
|------------------------------------|-----------------------|---------------------|------------|---------|-----------------------|-----------------------|---------------------|------------|---------|-----------------------|
|                                    | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE | INBOARD | SAILBOAT 19' & LARGER | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE | INBOARD | SAILBOAT 19' & LARGER |
| n=                                 | 1,260                 | 852                 | 477        | 375     | 36                    | 295                   | 245                 | 152        | 99      | 4                     |
| Salesperson                        | 47.0%                 | 34.5%               | 52.9%      | 43.6%   | 28.5%                 | 44.0%                 | 42.0%               | 49.3%      | 35.7%   | 38.9%                 |
| Prior experience/owned             | 23.6%                 | 32.3%               | 23.2%      | 39.8%   | 53.3%                 | 31.8%                 | 26.6%               | 28.0%      | 23.8%   | 23.8%                 |
| Display in the dealership/retailer | 22.5%                 | 26.2%               | 22.9%      | 14.9%   | 26.9%                 | 23.9%                 | 26.3%               | 30.1%      | 28.6%   | 35.4%                 |
| Boat show                          | 20.3%                 | 21.4%               | 22.9%      | 20.1%   | 28.3%                 | 20.8%                 | 19.8%               | 43.8%      | 28.0%   | 35.3%                 |
| Saw accessories on other boats     | 16.7%                 | 26.2%               | 19.9%      | 19.9%   | 14.4%                 | 14.7%                 | 31.9%               | 33.0%      | 21.9%   | 19.4%                 |
| Boat brochure                      | 10.4%                 | 24.6%               | 30.6%      | 18.4%   | 41.4%                 | 15.5%                 | 20.4%               | 18.3%      | 25.5%   | 34.4%                 |
| Magazine                           | 5.9%                  | 18.1%               | 13.1%      | 14.3%   | 27.0%                 | 9.4%                  | 10.9%               | 17.5%      | 16.3%   | 52.0%                 |
| Friends/relatives                  | 9.3%                  | 11.3%               | 8.4%       | 21.2%   | 1.9%                  | 13.2%                 | 20.1%               | 18.1%      | 25.8%   | 34.4%                 |
| Aftermarket catalog                | 10.0%                 | 10.9%               | 10.7%      | 8.9%    | 2.6%                  | 3.9%                  | 8.0%                | 11.9%      | 16.3%   | 18.6%                 |
| Website/Internet                   | 4.8%                  | 13.3%               | 5.8%       | 19.0%   | 16.8%                 | 12.6%                 | 15.5%               | 8.6%       | 26.0%   | 51.6%                 |
| Newspaper                          | 2.1%                  | 0.6%                | 2.7%       | 2.8%    | 1.4%                  | 1.1%                  | 0.3%                | 2.0%       | 0.2%    | —                     |
| Television                         | 1.2%                  | 1.9%                | 2.7%       | 0.2%    | —                     | 1.1%                  | 1.1%                | 2.0%       | 2.4%    | —                     |
| Other                              | 1.9%                  | 1.5%                | 2.4%       | —       | —                     | 1.1%                  | 1.0%                | 1.9%       | 2.2%    | —                     |

|                                    | 2011 SURVEY PURCHASED ACCESSORIES |       | 2012 SURVEY PURCHASED ACCESSORIES |       |
|------------------------------------|-----------------------------------|-------|-----------------------------------|-------|
|                                    | YES                               | NO    | YES                               | NO    |
| n=                                 | 2,247                             | 753   | 673                               | 122   |
| Salesperson                        | 41.4%                             | 55.7% | 43.1%                             | 44.7% |
| Prior experience/owned             | 28.3%                             | 25.7% | 27.5%                             | 33.7% |
| Display in the dealership/retailer | 22.7%                             | 22.5% | 28.4%                             | 16.0% |
| Boat show                          | 22.9%                             | 16.0% | 26.4%                             | 23.2% |
| Saw accessories on other boats     | 22.9%                             | 10.8% | 23.6%                             | 29.0% |
| Boat brochure                      | 21.8%                             | 12.1% | 20.5%                             | 9.8%  |
| Magazine                           | 12.6%                             | 8.0%  | 13.4%                             | 7.3%  |
| Friends/relatives                  | 11.9%                             | 7.6%  | 17.8%                             | 18.8% |
| Aftermarket catalog                | 12.6%                             | 2.3%  | 8.7%                              | 6.1%  |
| Website/Internet                   | 9.4%                              | 6.7%  | 15.2%                             | 11.1% |
| Newspaper                          | 2.6%                              | —     | 1.1%                              | —     |
| Television                         | 2.0%                              | —     | 1.7%                              | —     |
| Other                              | 1.7%                              | 1.6%  | 1.2%                              | 2.0%  |

**TABLE 18.1c Continued**

|                                    | AMOUNT SPENT 2011 SURVEY |               |          | AMOUNT SPENT 2012 SURVEY |               |          |
|------------------------------------|--------------------------|---------------|----------|--------------------------|---------------|----------|
|                                    | \$500 OR LESS            | \$501-\$1,000 | \$1,000+ | \$500 OR LESS            | \$501-\$1,000 | \$1,000+ |
| n=                                 | 1,468                    | 355           | 551      | 257                      | 149           | 267      |
| Salesperson                        | 41.9%                    | 42.5%         | 39.8%    | 47.1%                    | 42.0%         | 39.8%    |
| Prior experience/owned             | 27.5%                    | 25.8%         | 29.2%    | 25.8%                    | 39.2%         | 22.4%    |
| Display in the dealership/retailer | 21.3%                    | 22.2%         | 24.3%    | 31.1%                    | 18.4%         | 31.3%    |
| Boat show                          | 20.4%                    | 13.9%         | 31.4%    | 26.2%                    | 19.8%         | 31.4%    |
| Saw accessories on other boats     | 17.2%                    | 22.1%         | 36.6%    | 20.4%                    | 24.1%         | 27.5%    |
| Boat brochure                      | 20.4%                    | 22.9%         | 23.2%    | 12.6%                    | 23.2%         | 27.9%    |
| Magazine                           | 9.4%                     | 9.7%          | 22.0%    | 9.7%                     | 12.9%         | 18.5%    |
| Friends/relatives                  | 9.6%                     | 6.0%          | 17.6%    | 20.2%                    | 10.4%         | 20.7%    |
| Aftermarket catalog                | 8.7%                     | 5.4%          | 24.9%    | 3.5%                     | 7.4%          | 14.5%    |
| Website/Internet                   | 5.0%                     | 5.1%          | 20.0%    | 6.6%                     | 12.8%         | 26.0%    |
| Newspaper                          | 2.9%                     | 0.4%          | 2.6%     | 0.1%                     | 2.3%          | 0.3%     |
| Television                         | 2.2%                     | 3.3%          | 2.2%     | 1.4%                     | 1.9%          | 1.9%     |
| Other                              | 1.8%                     | —             | 1.8%     | —                        | 2.3%          | 1.9%     |

**18.1d Influence of accessories on boat buyer's choice of sales outlet**

*Respondents were asked how much accessories influenced where they chose to purchase their boat.*

Accessories can influence a boat buyer's decision on where to buy a boat; the choice of sales outlet for nearly 3 of 10 new boat buyers was influenced by accessories. Pre-owned boat buyers were less likely to be influenced by accessories; fewer than 2 of 10 said that accessories influenced their choice of sales outlets and 6 out of 10 said accessories had no influence at all.

**TABLE 18.1d**

|                       | OWNERSHIP 2011 SURVEY |               |                     |                     | OWNERSHIP 2012 SURVEY |               |                     |                     |
|-----------------------|-----------------------|---------------|---------------------|---------------------|-----------------------|---------------|---------------------|---------------------|
|                       | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER |
| n=                    | 726                   | 35            | 20                  | 671                 | 795                   | 37            | 18                  | 741                 |
| 1 = "Not at all"      | 44.7%                 | 21.2%         | 36.9%               | 46.1%               | 46.0%                 | 25.2%         | 51.8%               | 46.9%               |
| 2                     | 13.1%                 | 15.0%         | 17.9%               | 12.8%               | 18.5%                 | 17.3%         | 8.3%                | 18.8%               |
| 3                     | 25.9%                 | 27.9%         | 29.5%               | 25.7%               | 19.4%                 | 30.2%         | 22.4%               | 18.8%               |
| 4                     | 12.2%                 | 25.5%         | 11.4%               | 11.5%               | 13.6%                 | 20.7%         | 15.2%               | 13.2%               |
| 5 = "Completely"      | 4.2%                  | 10.3%         | 4.4%                | 3.9%                | 2.5%                  | 6.6%          | 2.3%                | 2.3%                |
| <b>Total</b>          | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       |
| <b>NET: TOP 2 BOX</b> | <b>16.4%</b>          | <b>35.9%</b>  | <b>15.7%</b>        | <b>15.4%</b>        | <b>16.1%</b>          | <b>27.3%</b>  | <b>17.5%</b>        | <b>15.5%</b>        |

|                       | BOAT TYPE 2011 SURVEY |                     |               |               |                       | BOAT TYPE 2012 SURVEY |                     |               |               |                       |
|-----------------------|-----------------------|---------------------|---------------|---------------|-----------------------|-----------------------|---------------------|---------------|---------------|-----------------------|
|                       | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER |
| n=                    | 303                   | 168                 | 163           | 85            | 7                     | 295                   | 245                 | 152           | 99            | 4                     |
| 1 = "Not at all"      | 47.3%                 | 40.8%               | 42.2%         | 45.8%         | 63.4%                 | 41.6%                 | 47.5%               | 56.9%         | 38.0%         | 71.2%                 |
| 2                     | 14.1%                 | 11.8%               | 13.3%         | 11.6%         | 15.9%                 | 21.1%                 | 15.6%               | 14.2%         | 25.0%         | 2.9%                  |
| 3                     | 27.3%                 | 25.1%               | 22.6%         | 29.7%         | 13.5%                 | 21.5%                 | 18.0%               | 12.7%         | 26.7%         | 21.4%                 |
| 4                     | 8.2%                  | 17.0%               | 16.2%         | 9.8%          | 5.2%                  | 12.1%                 | 16.5%               | 15.9%         | 7.9%          | 3.7%                  |
| 5 = "Completely"      | 3.1%                  | 5.4%                | 5.6%          | 3.2%          | 2.1%                  | 3.7%                  | 2.4%                | 0.3%          | 2.4%          | 0.8%                  |
| <b>TOTAL</b>          | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         |
| <b>NET: TOP 2 BOX</b> | <b>11.3%</b>          | <b>22.3%</b>        | <b>21.8%</b>  | <b>13.0%</b>  | <b>7.3%</b>           | <b>15.8%</b>          | <b>18.9%</b>        | <b>16.2%</b>  | <b>10.3%</b>  | <b>4.5%</b>           |

|                       | 2011 SURVEY PURCHASED ACCESSORIES |               | 2012 SURVEY PURCHASED ACCESSORIES |               |
|-----------------------|-----------------------------------|---------------|-----------------------------------|---------------|
|                       | YES                               | NO            | YES                               | NO            |
| n=                    | 551                               | 174           | 673                               | 122           |
| 1 = "Not at all"      | 38.4%                             | 64.3%         | 43.5%                             | 60.0%         |
| 2                     | 13.2%                             | 12.7%         | 20.0%                             | 10.1%         |
| 3                     | 29.7%                             | 13.8%         | 19.3%                             | 19.6%         |
| 4                     | 14.4%                             | 5.2%          | 15.1%                             | 5.6%          |
| 5 = "Completely"      | 4.3%                              | 3.9%          | 2.1%                              | 4.7%          |
| <b>TOTAL</b>          | <b>100.0%</b>                     | <b>100.0%</b> | <b>100.0%</b>                     | <b>100.0%</b> |
| <b>NET: TOP 2 BOX</b> | <b>18.7%</b>                      | <b>9.1%</b>   | <b>17.2%</b>                      | <b>10.3%</b>  |

**TABLE 18.1d Continued**

|                       | AMOUNT SPENT 2011 SURVEY |               |               | AMOUNT SPENT 2012 SURVEY |               |               |
|-----------------------|--------------------------|---------------|---------------|--------------------------|---------------|---------------|
|                       | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      |
| n=                    | 350                      | 82            | 154           | 257                      | 149           | 267           |
| 1 = "Not at all"      | 44.4%                    | 38.8%         | 23.3%         | 55.0%                    | 36.5%         | 36.0%         |
| 2                     | 13.8%                    | 12.7%         | 11.5%         | 19.0%                    | 22.5%         | 20.8%         |
| 3                     | 28.3%                    | 32.5%         | 33.8%         | 15.4%                    | 19.2%         | 22.2%         |
| 4                     | 10.4%                    | 12.7%         | 24.8%         | 10.3%                    | 18.6%         | 17.8%         |
| 5 = "Completely"      | 3.1%                     | 3.3%          | 6.6%          | 0.3%                     | 3.2%          | 3.2%          |
| <b>TOTAL</b>          | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> |
| <b>NET: TOP 2 BOX</b> | <b>13.5%</b>             | <b>16.1%</b>  | <b>31.5%</b>  | <b>10.5%</b>             | <b>21.8%</b>  | <b>21.0%</b>  |

**18.1e Timing of new accessory purchases**

*Respondents were asked if they had purchased any accessories in the six months after delivery of their boat, and if so, within what time frame.*

Nearly 5 of 10 boat owners purchased new boating accessories within two months of delivery.

Persons who had purchased a boat within the last 18 months were more likely to purchase accessories than the boating population as a whole: more than 7 of 10 new boat buyers purchased boating accessories within two months of delivery, while more than 6 of 10 pre-owned boat buyers purchased accessories within that time frame.

**TABLE 18.1e**

|                            | OWNERSHIP 2011 SURVEY |               |                     |                     | OWNERSHIP 2012 SURVEY |               |                     |                     |
|----------------------------|-----------------------|---------------|---------------------|---------------------|-----------------------|---------------|---------------------|---------------------|
|                            | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER |
| n=                         | 3,000                 | 60            | 240                 | 2,700               | 3,039                 | 61            | 244                 | 2,734               |
| Within a month of delivery | 27.2%                 | 36.0%         | 37.9%               | 26.1%               | 29.3%                 | 39.1%         | 44.8%               | 27.7%               |
| 1-2 months after delivery  | 19.4%                 | 33.5%         | 23.3%               | 18.7%               | 18.6%                 | 33.8%         | 22.0%               | 18.0%               |
| 3-4 months after delivery  | 8.5%                  | 9.6%          | 6.4%                | 8.7%                | 8.9%                  | 9.6%          | 5.7%                | 9.2%                |
| 5-6 months after delivery  | 7.1%                  | 4.1%          | 2.6%                | 7.6%                | 8.9%                  | 2.8%          | 3.5%                | 9.5%                |
| None                       | 37.8%                 | 16.7%         | 29.7%               | 39.0%               | 34.3%                 | 14.7%         | 24.0%               | 35.6%               |
| <b>TOTAL</b>               | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       |

|                            | BOAT TYPE 2011 SURVEY |                     |               |               |                       | BOAT TYPE 2012 SURVEY |                     |               |               |                       |
|----------------------------|-----------------------|---------------------|---------------|---------------|-----------------------|-----------------------|---------------------|---------------|---------------|-----------------------|
|                            | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER |
| n=                         | 1,260                 | 852                 | 477           | 375           | 36                    | 1,276                 | 863                 | 483           | 380           | 36                    |
| Within a month of delivery | 25.3%                 | 29.8%               | 23.7%         | 31.4%         | 35.9%                 | 24.8%                 | 31.5%               | 32.1%         | 35.7%         | 31.6%                 |
| 1-2 months after delivery  | 16.3%                 | 22.3%               | 23.2%         | 18.2%         | 20.7%                 | 18.1%                 | 22.1%               | 14.4%         | 17.3%         | 24.4%                 |
| 3-4 months after delivery  | 8.3%                  | 7.6%                | 9.6%          | 9.9%          | 6.2%                  | 7.2%                  | 11.1%               | 9.3%          | 9.3%          | 10.9%                 |
| 5-6 months after delivery  | 8.7%                  | 5.0%                | 6.2%          | 6.9%          | 14.9%                 | 10.4%                 | 6.4%                | 9.1%          | 8.5%          | 13.9%                 |
| None                       | 41.4%                 | 35.3%               | 37.2%         | 33.7%         | 22.2%                 | 39.5%                 | 28.9%               | 35.1%         | 29.2%         | 19.2%                 |
| <b>TOTAL</b>               | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         |

|                            | 2011 SURVEY PURCHASED ACCESSORIES |               | 2012 SURVEY PURCHASED ACCESSORIES |               |
|----------------------------|-----------------------------------|---------------|-----------------------------------|---------------|
|                            | YES                               | NO            | YES                               | NO            |
| n=                         | 2,247                             | 753           | 2,374                             | 665           |
| Within a month of delivery | 32.1%                             | 12.8%         | 34.1%                             | 11.9%         |
| 1-2 months after delivery  | 23.3%                             | 7.8%          | 21.4%                             | 8.8%          |
| 3-4 months after delivery  | 10.4%                             | 2.7%          | 10.6%                             | 3.2%          |
| 5-6 months after delivery  | 8.2%                              | 3.8%          | 10.0%                             | 4.7%          |
| None                       | 26.1%                             | 72.8%         | 23.9%                             | 71.4%         |
| <b>TOTAL</b>               | <b>100.0%</b>                     | <b>100.0%</b> | <b>100.0%</b>                     | <b>100.0%</b> |

|                            | AMOUNT SPENT 2011 SURVEY |               |               | AMOUNT SPENT 2012 SURVEY |               |               |
|----------------------------|--------------------------|---------------|---------------|--------------------------|---------------|---------------|
|                            | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      |
| n=                         | 1,468                    | 355           | 551           | 1,184                    | 479           | 708           |
| Within a month of delivery | 30.1%                    | 33.6%         | 38.2%         | 31.9%                    | 34.8%         | 37.3%         |
| 1-2 months after delivery  | 19.7%                    | 31.2%         | 27.9%         | 17.9%                    | 27.7%         | 23.4%         |
| 3-4 months after delivery  | 10.6%                    | 8.0%          | 10.2%         | 9.3%                     | 11.1%         | 11.9%         |
| 5-6 months after delivery  | 8.2%                     | 8.3%          | 9.0%          | 11.4%                    | 9.1%          | 8.4%          |
| None                       | 31.4%                    | 18.9%         | 14.7%         | 29.5%                    | 17.3%         | 19.0%         |
| <b>TOTAL</b>               | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> |

## 18.1f Timing of add-on purchases

*Respondents were asked what time of year they purchase add-on items.*

As the lead-in to the boating season for most of the country, spring was the most popular time of year for the purchase of add-on accessories; 44% of boat owners bought add-on items in the spring, while 33% purchased accessories as needed

**TABLE 18.1f**

|              | OWNERSHIP 2011 SURVEY |               |                     |                     | OWNERSHIP 2012 SURVEY |               |                     |                     |
|--------------|-----------------------|---------------|---------------------|---------------------|-----------------------|---------------|---------------------|---------------------|
|              | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER |
| n=           | 2,247                 | 55            | 205                 | 1,987               | 3,039                 | 61            | 244                 | 2,734               |
| Winter       | 5.0%                  | 13.2%         | 6.3%                | 4.6%                | 7.4%                  | 10.7%         | 7.8%                | 7.3%                |
| Spring       | 42.3%                 | 42.4%         | 40.2%               | 42.5%               | 44.0%                 | 47.4%         | 45.6%               | 43.8%               |
| Summer       | 19.4%                 | 22.9%         | 18.4%               | 19.4%               | 13.3%                 | 18.8%         | 16.5%               | 12.9%               |
| Autumn       | 2.6%                  | 3.9%          | 3.6%                | 2.5%                | 2.2%                  | 2.0%          | 1.9%                | 2.2%                |
| Anytime      | 35.0%                 | 25.7%         | 37.5%               | 35.0%               | 33.1%                 | 21.1%         | 28.2%               | 33.8%               |
| <b>TOTAL</b> | <b>104.3%</b>         | <b>108.1%</b> | <b>106.1%</b>       | <b>104.0%</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       |

|              | BOAT TYPE 2011 SURVEY |                     |               |               |                       | BOAT TYPE 2012 SURVEY |                     |               |               |                       |
|--------------|-----------------------|---------------------|---------------|---------------|-----------------------|-----------------------|---------------------|---------------|---------------|-----------------------|
|              | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER |
| n=           | 888                   | 657                 | 383           | 286           | 33                    | 1,276                 | 863                 | 483           | 380           | 36                    |
| Winter       | 4.1%                  | 5.0%                | 4.8%          | 7.4%          | 6.5%                  | 6.9%                  | 8.8%                | 5.6%          | 8.6%          | 7.3%                  |
| Spring       | 44.6%                 | 37.3%               | 46.1%         | 42.7%         | 32.4%                 | 44.3%                 | 42.0%               | 47.4%         | 43.0%         | 48.2%                 |
| Summer       | 18.6%                 | 21.0%               | 19.4%         | 19.0%         | 12.7%                 | 11.0%                 | 13.8%               | 15.0%         | 17.7%         | 9.2%                  |
| Autumn       | 1.9%                  | 3.8%                | 3.3%          | 1.8%          | 0.4%                  | 2.2%                  | 2.1%                | 1.9%          | 2.6%          | 2.0%                  |
| Anytime      | 34.1%                 | 38.0%               | 32.3%         | 32.4%         | 50.9%                 | 35.6%                 | 33.3%               | 30.1%         | 28.1%         | 33.3%                 |
| <b>TOTAL</b> | <b>103.3%</b>         | <b>105.1%</b>       | <b>105.9%</b> | <b>103.4%</b> | <b>103.0%</b>         | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         |

|              | AMOUNT SPENT 2011 SURVEY |               |               | AMOUNT SPENT 2012 SURVEY |               |               |
|--------------|--------------------------|---------------|---------------|--------------------------|---------------|---------------|
|              | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      |
| n=           | 1,468                    | 355           | 551           | 1,184                    | 479           | 708           |
| Winter       | 2.5%                     | 8.1%          | 10.7%         | 6.9%                     | 7.7%          | 9.5%          |
| Spring       | 43.7%                    | 37.3%         | 39.0%         | 45.3%                    | 49.2%         | 52.5%         |
| Summer       | 20.7%                    | 16.0%         | 16.6%         | 14.5%                    | 14.5%         | 12.1%         |
| Autumn       | 2.5%                     | 1.3%          | 3.8%          | 2.5%                     | 3.4%          | 2.0%          |
| Anytime      | 35.1%                    | 39.4%         | 34.2%         | 30.8%                    | 25.2%         | 23.9%         |
| <b>TOTAL</b> | <b>104.6%</b>            | <b>102.2%</b> | <b>104.3%</b> | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> |



## 18.1g Timing of repair and maintenance purchases

Respondents were asked what time of year they purchase repair and maintenance accessories.

As would be expected, boat owners most frequently purchased repair and maintenance accessories as needed (37%) and in the spring (35%).

**TABLE 18.1g**

|              | OWNERSHIP 2011 SURVEY |               |                     |                     | OWNERSHIP 2012 SURVEY |               |                     |                     |
|--------------|-----------------------|---------------|---------------------|---------------------|-----------------------|---------------|---------------------|---------------------|
|              | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER |
| n=           | 2,247                 | 55            | 205                 | 1,987               | 3,039                 | 61            | 244                 | 2,734               |
| Winter       | 5.8%                  | 10.7%         | 6.6%                | 5.5%                | 8.5%                  | 11.8%         | 9.3%                | 8.4%                |
| Spring       | 35.6%                 | 32.7%         | 31.8%               | 36.1%               | 35.0%                 | 32.9%         | 35.1%               | 35.1%               |
| Summer       | 16.3%                 | 22.0%         | 16.2%               | 16.1%               | 12.0%                 | 21.1%         | 14.6%               | 11.5%               |
| Autumn       | 7.7%                  | 8.2%          | 6.8%                | 7.8%                | 8.0%                  | 8.4%          | 5.0%                | 8.2%                |
| Anytime      | 39.1%                 | 33.1%         | 45.2%               | 38.6%               | 36.5%                 | 25.8%         | 36.0%               | 36.8%               |
| <b>TOTAL</b> | <b>104.4%</b>         | <b>106.7%</b> | <b>106.6%</b>       | <b>104.1%</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       |

|              | BOAT TYPE 2011 SURVEY |                     |               |               |                       | BOAT TYPE 2012 SURVEY |                     |               |               |                       |
|--------------|-----------------------|---------------------|---------------|---------------|-----------------------|-----------------------|---------------------|---------------|---------------|-----------------------|
|              | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER |
| n=           | 888                   | 657                 | 383           | 286           | 33                    | 1,276                 | 863                 | 483           | 380           | 36                    |
| Winter       | 4.1%                  | 7.8%                | 4.8%          | 7.5%          | 3.7%                  | 10.4%                 | 7.8%                | 4.8%          | 9.0%          | 6.1%                  |
| Spring       | 38.2%                 | 32.3%               | 36.5%         | 33.1%         | 44.2%                 | 35.2%                 | 36.9%               | 33.9%         | 31.5%         | 38.7%                 |
| Summer       | 15.9%                 | 15.9%               | 16.4%         | 18.9%         | 7.7%                  | 11.7%                 | 11.8%               | 9.8%          | 16.2%         | 9.8%                  |
| Autumn       | 7.4%                  | 4.7%                | 11.1%         | 11.1%         | 6.0%                  | 7.0%                  | 6.0%                | 11.9%         | 10.5%         | 10.3%                 |
| Any          | 37.3%                 | 43.4%               | 36.0%         | 38.4%         | 44.0%                 | 35.7%                 | 37.5%               | 39.6%         | 32.8%         | 35.1%                 |
| <b>TOTAL</b> | <b>103.0%</b>         | <b>104.2%</b>       | <b>104.8%</b> | <b>108.9%</b> | <b>105.5%</b>         | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         |

|              | AMOUNT SPENT 2011 SURVEY |               |               | AMOUNT SPENT 2012 SURVEY |               |               |
|--------------|--------------------------|---------------|---------------|--------------------------|---------------|---------------|
|              | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      |
| n=           | 1,468                    | 355           | 551           | 1,184                    | 479           | 708           |
| Winter       | 4.3%                     | 6.0%          | 8.9%          | 6.6%                     | 8.5%          | 9.3%          |
| Spring       | 36.8%                    | 34.5%         | 32.1%         | 37.8%                    | 36.0%         | 38.2%         |
| Summer       | 16.6%                    | 14.4%         | 16.1%         | 14.0%                    | 12.1%         | 11.6%         |
| Autumn       | 7.9%                     | 7.1%          | 6.4%          | 7.4%                     | 12.6%         | 9.3%          |
| Anytime      | 38.5%                    | 43.2%         | 41.0%         | 34.2%                    | 30.8%         | 31.6%         |
| <b>TOTAL</b> | <b>104.0%</b>            | <b>105.2%</b> | <b>104.5%</b> | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> |

## 18.1h Timing of upgrade purchases

Respondents were asked what time of year they purchased upgrade accessories.

Boat owners most frequently purchased accessories to upgrade their boats in the spring (39.5%) and as needed (35%).

**TABLE 18.1h**

|              | OWNERSHIP 2011 SURVEY |               |                     |                     | OWNERSHIP 2012 SURVEY |               |                     |                     |
|--------------|-----------------------|---------------|---------------------|---------------------|-----------------------|---------------|---------------------|---------------------|
|              | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER |
| n=           | 2,247                 | 55            | 205                 | 1,987               | 3,039                 | 61            | 244                 | 2,734               |
| Winter       | 6.4%                  | 8.8%          | 6.6%                | 6.3%                | 6.8%                  | 8.6%          | 6.8%                | 6.8%                |
| Spring       | 35.6%                 | 36.4%         | 34.3%               | 35.7%               | 39.5%                 | 38.7%         | 39.6%               | 39.5%               |
| Summer       | 19.2%                 | 23.5%         | 20.5%               | 19.0%               | 15.0%                 | 22.9%         | 17.8%               | 14.6%               |
| Autumn       | 4.0%                  | 6.2%          | 3.1%                | 4.1%                | 3.6%                  | 5.6%          | 2.8%                | 3.6%                |
| Anytime      | 38.6%                 | 31.4%         | 41.3%               | 38.5%               | 35.1%                 | 24.2%         | 33.0%               | 35.5%               |
| <b>TOTAL</b> | <b>103.8%</b>         | <b>106.3%</b> | <b>106.0%</b>       | <b>103.6%</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       |

|              | BOAT TYPE 2011 SURVEY |                     |               |               |                       | BOAT TYPE 2012 SURVEY |                     |               |               |                       |
|--------------|-----------------------|---------------------|---------------|---------------|-----------------------|-----------------------|---------------------|---------------|---------------|-----------------------|
|              | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER |
| n=           | 888                   | 657                 | 383           | 286           | 33                    | 1,276                 | 863                 | 483           | 380           | 36                    |
| Winter       | 5.4%                  | 7.0%                | 5.0%          | 9.6%          | 8.7%                  | 6.7%                  | 9.4%                | 3.5%          | 5.3%          | 10.6%                 |
| Spring       | 38.1%                 | 32.6%               | 38.4%         | 31.9%         | 26.6%                 | 38.2%                 | 38.7%               | 42.4%         | 42.5%         | 36.0%                 |
| Summer       | 18.8%                 | 18.8%               | 23.2%         | 17.2%         | 10.3%                 | 14.1%                 | 14.5%               | 16.0%         | 18.2%         | 15.1%                 |
| Autumn       | 2.9%                  | 5.5%                | 3.4%          | 5.2%          | 3.5%                  | 3.2%                  | 3.5%                | 3.9%          | 4.5%          | 1.9%                  |
| Anytime      | 37.7%                 | 40.9%               | 36.8%         | 37.1%         | 51.2%                 | 37.8%                 | 33.9%               | 34.2%         | 29.5%         | 36.4%                 |
| <b>TOTAL</b> | <b>102.9%</b>         | <b>104.7%</b>       | <b>106.8%</b> | <b>101.0%</b> | <b>100.3%</b>         | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         |

|              | AMOUNT SPENT 2011 SURVEY |               |               | AMOUNT SPENT 2012 SURVEY |               |               |
|--------------|--------------------------|---------------|---------------|--------------------------|---------------|---------------|
|              | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      |
| n=           | 1,468                    | 355           | 551           | 1,184                    | 479           | 708           |
| Winter       | 3.8%                     | 10.4%         | 11.7%         | 5.7%                     | 8.1%          | 7.9%          |
| Spring       | 38.9%                    | 30.2%         | 28.3%         | 41.8%                    | 41.0%         | 47.9%         |
| Summer       | 19.3%                    | 14.4%         | 20.6%         | 15.9%                    | 19.0%         | 14.4%         |
| Autumn       | 3.4%                     | 5.4%          | 5.6%          | 2.8%                     | 4.4%          | 4.3%          |
| Anytime      | 39.2%                    | 42.2%         | 36.3%         | 33.8%                    | 27.5%         | 25.5%         |
| <b>TOTAL</b> | <b>104.5%</b>            | <b>102.7%</b> | <b>102.5%</b> | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> |

## 18.1j Accessory installation

### Respondents were asked who installed the boat accessories they purchased.

Overall, 7 of 10 boat owners who purchased accessories in 2012 also installed them.

However, there was a marked difference in self-installation rates among the owners of new boats and pre-owned and existing boat owners. Boat owners who purchased a new boat within the past 18 months were less likely to perform accessory installations; 56% installed the accessories they purchased compared to 77% for those who purchased a pre-owned boat within the last 18 months and 70% for existing boat owners.

Slightly more than 4 of 10 (42%) boat owners who purchased a new boat within the past 18 months chose to have the dealer install the accessories.

**TABLE 18.1j**

|                 | OWNERSHIP 2011 SURVEY |               |                     |                     | OWNERSHIP 2012 SURVEY |               |                     |                     |
|-----------------|-----------------------|---------------|---------------------|---------------------|-----------------------|---------------|---------------------|---------------------|
|                 | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER |
| n=              | 2,247                 | 55            | 205                 | 1,987               | 2,374                 | 57            | 204                 | 2,113               |
| Yourself        | 74.5%                 | 56.5%         | 78.3%               | 74.6%               | 70.2%                 | 55.9%         | 76.9%               | 70.0%               |
| Friend/relative | 16.9%                 | 18.3%         | 21.1%               | 16.4%               | 13.9%                 | 11.9%         | 20.6%               | 13.3%               |
| Dealer          | 12.2%                 | 39.8%         | 8.2%                | 11.8%               | 14.7%                 | 42.4%         | 10.2%               | 14.4%               |
| Marina          | 6.3%                  | 7.8%          | 7.6%                | 6.2%                | 10.5%                 | 9.2%          | 10.4%               | 10.6%               |
| Retailer        | 2.9%                  | 5.2%          | 3.4%                | 2.8%                | 4.5%                  | 5.1%          | 4.4%                | 4.5%                |
| None of above   | 4.5%                  | 3.2%          | 4.2%                | 4.6%                | 6.3%                  | 3.5%          | 4.1%                | 6.6%                |

|                 | BOAT TYPE 2011 SURVEY |                     |            |         |                       | BOAT TYPE 2012 SURVEY |                     |            |         |                       |
|-----------------|-----------------------|---------------------|------------|---------|-----------------------|-----------------------|---------------------|------------|---------|-----------------------|
|                 | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE | INBOARD | SAILBOAT 19' & LARGER | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE | INBOARD | SAILBOAT 19' & LARGER |
| n=              | 888                   | 657                 | 383        | 286     | 33                    | 929                   | 715                 | 379        | 318     | 33                    |
| Yourself        | 77.1%                 | 78.2%               | 68.1%      | 65.9%   | 78.0%                 | 74.2%                 | 69.4%               | 66.4%      | 63.7%   | 82.7%                 |
| Friend/relative | 15.4%                 | 20.3%               | 15.4%      | 15.5%   | 15.5%                 | 11.2%                 | 16.7%               | 12.1%      | 18.0%   | 11.3%                 |
| Dealer          | 12.2%                 | 10.6%               | 13.1%      | 14.5%   | 9.4%                  | 11.6%                 | 17.5%               | 18.5%      | 13.7%   | 10.4%                 |
| Marina          | 2.5%                  | 5.7%                | 14.5%      | 7.6%    | 15.0%                 | 6.0%                  | 9.6%                | 20.4%      | 13.8%   | 14.6%                 |
| Retailer        | 2.2%                  | 3.5%                | 3.5%       | 3.0%    | 0.8%                  | 3.5%                  | 4.4%                | 5.9%       | 5.8%    | 4.4%                  |
| None of above   | 4.5%                  | 2.5%                | 3.6%       | 10.4%   | 3.2%                  | 6.1%                  | 5.4%                | 6.5%       | 8.9%    | 3.9%                  |

|                 | AMOUNT SPENT 2011 SURVEY |               |          | AMOUNT SPENT 2012 SURVEY |               |          |
|-----------------|--------------------------|---------------|----------|--------------------------|---------------|----------|
|                 | \$500 OR LESS            | \$501-\$1,000 | \$1,000+ | \$500 OR LESS            | \$501-\$1,000 | \$1,000+ |
| n=              | 1,468                    | 355           | 551      | 1,181                    | 479           | 708      |
| Yourself        | 77.8%                    | 72.0%         | 66.0%    | 72.9%                    | 71.6%         | 65.1%    |
| Friend/relative | 14.2%                    | 24.4%         | 22.1%    | 12.4%                    | 13.3%         | 17.0%    |
| Dealer          | 7.6%                     | 11.6%         | 24.9%    | 5.8%                     | 17.7%         | 27.7%    |
| Marina          | 3.2%                     | 8.7%          | 13.5%    | 6.2%                     | 6.4%          | 20.7%    |
| Retailer        | 1.8%                     | 4.9%          | 6.0%     | 1.4%                     | 4.6%          | 9.5%     |
| None of above   | 6.1%                     | 0.8%          | 1.6%     | 8.8%                     | 5.2%          | 2.5%     |

## 18.1k How satisfied were you with the installation job: Dealer

More than 8 of 10 boat owners were very satisfied or Extremely satisfied with the installation performed by the dealer from which they purchased boating accessories in 2012.

**TABLE 18.1k**

|                          | OWNERSHIP 2011 SURVEY |               |                     |                     | OWNERSHIP 2012 SURVEY |               |                     |                     |
|--------------------------|-----------------------|---------------|---------------------|---------------------|-----------------------|---------------|---------------------|---------------------|
|                          | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER |
| n=                       | 273                   | 22            | 17                  | 234                 | 350                   | 24            | 21                  | 305                 |
| <b>NET: TOP 2 BOX</b>    | <b>80.7%</b>          | <b>80.5%</b>  | <b>73.5%</b>        | <b>81.3%</b>        | <b>86.3%</b>          | <b>77.4%</b>  | <b>87.7%</b>        | <b>86.9%</b>        |
| 1 = Not at all satisfied | 3.1%                  | 0.0%          | 0.0%                | 3.6%                | 1.1%                  | 1.5%          | 1.0%                | 1.1%                |
| 2                        | 3.4%                  | 3.6%          | 9.5%                | 3.0%                | 2.4%                  | 2.2%          | 0.0%                | 2.6%                |
| 3                        | 12.7%                 | 15.8%         | 17.0%               | 12.1%               | 10.2%                 | 18.9%         | 11.4%               | 9.4%                |
| 4                        | 34.2%                 | 40.4%         | 43.3%               | 33.0%               | 43.0%                 | 36.4%         | 39.7%               | 43.8%               |
| 5 = Extremely satisfied  | 46.5%                 | 40.2%         | 30.2%               | 48.2%               | 43.3%                 | 41.0%         | 47.9%               | 43.1%               |
| <b>MEAN</b>              | <b>4.18</b>           | <b>4.17</b>   | <b>3.94</b>         | <b>4.19</b>         | <b>4.25</b>           | <b>4.13</b>   | <b>4.34</b>         | <b>4.25</b>         |

|                          | BOAT TYPE 2011 SURVEY |                     |              |              |                       | BOAT TYPE 2012 SURVEY |                     |              |              |                       |
|--------------------------|-----------------------|---------------------|--------------|--------------|-----------------------|-----------------------|---------------------|--------------|--------------|-----------------------|
|                          | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE   | INBOARD      | SAILBOAT 19' & LARGER | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE   | INBOARD      | SAILBOAT 19' & LARGER |
| n=                       | 109                   | 70                  | 50           | 42           | 3                     | 107                   | 125                 | 70           | 44           | 3                     |
| <b>NET: TOP 2 BOX</b>    | <b>76.1%</b>          | <b>78.1%</b>        | <b>97.5%</b> | <b>76.0%</b> | <b>96.3%</b>          | <b>88.2%</b>          | <b>80.2%</b>        | <b>94.0%</b> | <b>88.4%</b> | <b>63.1%</b>          |
| 1 = Not at all satisfied | 7.8%                  | 0.0%                | 0.0%         | 0.0%         | 0.0%                  | 3.3%                  | 0.3%                | 0.0%         | 0.0%         | 0.0%                  |
| 2                        | 0.6%                  | 4.5%                | 1.1%         | 12.0%        | 0.0%                  | 3.2%                  | 2.1%                | 0.1%         | 5.3%         | 0.0%                  |
| 3                        | 15.5%                 | 17.4%               | 1.5%         | 12.0%        | 3.7%                  | 5.2%                  | 17.4%               | 5.9%         | 6.3%         | 36.9%                 |
| 4                        | 20.4%                 | 46.8%               | 52.8%        | 27.0%        | 34.8%                 | 32.2%                 | 44.1%               | 49.0%        | 58.7%        | 21.9%                 |
| 5 = Extremely satisfied  | 55.7%                 | 31.3%               | 44.7%        | 48.9%        | 61.4%                 | 56.1%                 | 36.1%               | 45.0%        | 29.7%        | 41.2%                 |
| <b>MEAN</b>              | <b>4.16</b>           | <b>4.05</b>         | <b>4.41</b>  | <b>4.13</b>  | <b>4.58</b>           | <b>4.34</b>           | <b>4.14</b>         | <b>4.39</b>  | <b>4.13</b>  | <b>4.04</b>           |

|                          | AMOUNT SPENT 2011 SURVEY |               |              | AMOUNT SPENT 2012 SURVEY |               |              |
|--------------------------|--------------------------|---------------|--------------|--------------------------|---------------|--------------|
|                          | \$500 OR LESS            | \$501-\$1,000 | \$1,000+     | \$500 OR LESS            | \$501-\$1,000 | \$1,000+     |
| n=                       | 112                      | 41            | 137          | 69                       | 85            | 196          |
| <b>NET: TOP 2 BOX</b>    | <b>76.0%</b>             | <b>85.0%</b>  | <b>85.1%</b> | <b>86.8%</b>             | <b>88.6%</b>  | <b>85.2%</b> |
| 1 = Not at all satisfied | 7.6%                     | 0.0%          | 0.0%         | 0.4%                     | 3.9%          | 0.1%         |
| 2                        | 3.0%                     | 6.5%          | 2.5%         | 0.3%                     | 0.0%          | 4.2%         |
| 3                        | 13.4%                    | 8.5%          | 12.4%        | 12.5%                    | 7.5%          | 10.5%        |
| 4                        | 34.2%                    | 40.1%         | 32.4%        | 34.4%                    | 47.3%         | 44.3%        |
| 5 = Extremely satisfied  | 41.8%                    | 44.9%         | 52.7%        | 52.4%                    | 41.4%         | 40.9%        |
| <b>MEAN</b>              | <b>4.00</b>              | <b>4.23</b>   | <b>4.35</b>  | <b>4.38</b>              | <b>4.22</b>   | <b>4.22</b>  |

## 18.11 How satisfied were you with the installation job: Marina

Nearly 9 of 10 (89%) boat owners were very satisfied or Extremely satisfied with the installation performed by the marina from which they purchased boating accessories in 2012.

**TABLE 18.11**

|                          | OWNERSHIP 2011 SURVEY |               |                     |                     | OWNERSHIP 2012 SURVEY |               |                     |                     |
|--------------------------|-----------------------|---------------|---------------------|---------------------|-----------------------|---------------|---------------------|---------------------|
|                          | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER |
| n=                       | 143                   | 4             | 16                  | 123                 | 250                   | 5             | 21                  | 224                 |
| <b>NET: TOP 2 BOX</b>    | <b>88.3%</b>          | <b>78.9%</b>  | <b>71.7%</b>        | <b>90.8%</b>        | <b>89.3%</b>          | <b>83.6%</b>  | <b>85.9%</b>        | <b>89.7%</b>        |
| 1 = Not at all satisfied | 0.0%                  | 0.0%          | 0.0%                | 0.0%                | 0.3%                  | —             | 1.0%                | 0.3%                |
| 2                        | 0.6%                  | —             | 5.4%                | —                   | 0.5%                  | 3.7%          | 1.8%                | 0.3%                |
| 3                        | 11.1%                 | 21.1%         | 22.9%               | 9.2%                | 10.0%                 | 12.7%         | 11.4%               | 9.7%                |
| 4                        | 50.4%                 | 29.9%         | 40.4%               | 52.4%               | 38.2%                 | 44.8%         | 46.4%               | 37.3%               |
| 5 = Extremely satisfied  | 37.9%                 | 49.0%         | 31.3%               | 38.4%               | 51.0%                 | 38.8%         | 39.4%               | 52.4%               |
| <b>MEAN</b>              | <b>4.26</b>           | <b>4.28</b>   | <b>3.98</b>         | <b>4.29</b>         | <b>4.39</b>           | <b>4.19</b>   | <b>4.22</b>         | <b>4.41</b>         |

|                          | BOAT TYPE 2011 SURVEY |                     |              |              |                       | BOAT TYPE 2012 SURVEY |                     |              |              |                       |
|--------------------------|-----------------------|---------------------|--------------|--------------|-----------------------|-----------------------|---------------------|--------------|--------------|-----------------------|
|                          | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE   | INBOARD      | SAILBOAT 19' & LARGER | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE   | INBOARD      | SAILBOAT 19' & LARGER |
| n=                       | 23                    | 38                  | 56           | 22           | 5                     | 56                    | 68                  | 77           | 44           | 5                     |
| <b>NET: TOP 2 BOX</b>    | <b>96.2%</b>          | <b>74.0%</b>        | <b>90.2%</b> | <b>97.4%</b> | <b>100.0%</b>         | <b>92.4%</b>          | <b>80.1%</b>        | <b>99.1%</b> | <b>83.9%</b> | <b>73.7%</b>          |
| 1 = Not at all satisfied | 0.0%                  | 0.0%                | 0.0%         | 0.0%         | 0.0%                  | —                     | 0.3%                | —            | —            | 12.3%                 |
| 2                        | 1.0%                  | 1.6%                | —            | —            | —                     | —                     | 0.2%                | 0.1%         | 0.9%         | 12.3%                 |
| 3                        | 2.7%                  | 24.3%               | 9.8%         | 2.6%         | —                     | 7.6%                  | 19.4%               | 0.8%         | 15.2%        | 1.7%                  |
| 4                        | 50.6%                 | 42.4%               | 60.6%        | 36.3%        | 58.7%                 | 28.1%                 | 44.6%               | 47.2%        | 25.9%        | 34.0%                 |
| 5 = Extremely satisfied  | 45.6%                 | 31.7%               | 29.7%        | 61.1%        | 41.3%                 | 64.3%                 | 35.5%               | 51.9%        | 58.0%        | 39.7%                 |
| <b>MEAN</b>              | <b>4.41</b>           | <b>4.04</b>         | <b>4.20</b>  | <b>4.59</b>  | <b>4.41</b>           | <b>4.57</b>           | <b>4.15</b>         | <b>4.51</b>  | <b>4.41</b>  | <b>3.76</b>           |

|                          | AMOUNT SPENT 2011 SURVEY |               |              | AMOUNT SPENT 2012 SURVEY |               |              |
|--------------------------|--------------------------|---------------|--------------|--------------------------|---------------|--------------|
|                          | \$500 OR LESS            | \$501-\$1,000 | \$1,000+     | \$500 OR LESS            | \$501-\$1,000 | \$1,000+     |
| n=                       | 47                       | 31            | 74           | 73                       | 30            | 147          |
| <b>NET: TOP 2 BOX</b>    | <b>85.7%</b>             | <b>88.3%</b>  | <b>90.8%</b> | <b>93.3%</b>             | <b>87.6%</b>  | <b>87.6%</b> |
| 1 = Not at all satisfied | 0.0%                     | 0.0%          | 0.0%         | —                        | —             | 0.5%         |
| 2                        | —                        | —             | 1.1%         | 0.1%                     | 0.2%          | 0.7%         |
| 3                        | 14.3%                    | 11.7%         | 8.1%         | 6.6%                     | 12.2%         | 11.2%        |
| 4                        | 28.7%                    | 66.7%         | 62.1%        | 40.8%                    | 45.6%         | 35.4%        |
| 5 = Extremely satisfied  | 57.0%                    | 21.6%         | 28.7%        | 52.5%                    | 42.0%         | 52.2%        |
| <b>MEAN</b>              | <b>4.43</b>              | <b>4.10</b>   | <b>4.18</b>  | <b>4.46</b>              | <b>4.29</b>   | <b>4.38</b>  |

## 18.1m How satisfied were you with the installation job: Retailer

Nearly 9 of 10 (89%) boat owners were very or Extremely satisfied with the installation performed by the retailer from whom they purchased boating accessories in 2012.

**TABLE 18.1m**

|                          | OWNERSHIP 2011 SURVEY |               |                     |                     | OWNERSHIP 2012 SURVEY |               |                     |                     |
|--------------------------|-----------------------|---------------|---------------------|---------------------|-----------------------|---------------|---------------------|---------------------|
|                          | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER |
| n=                       | 65                    | 3             | 7                   | 55                  | 107                   | 3             | 9                   | 95                  |
| <b>NET: TOP 2 BOX</b>    | <b>87.5%</b>          | <b>82.1%</b>  | <b>87.5%</b>        | <b>87.8%</b>        | <b>89.4%</b>          | <b>85.9%</b>  | <b>87.2%</b>        | <b>89.7%</b>        |
| 1 = Not at all satisfied | 0.3%                  | —             | 2.7%                | —                   | —                     | —             | —                   | —                   |
| 2                        | 0.1%                  | 2.0%          | —                   | —                   | 0.1%                  | 4.4%          | —                   | —                   |
| 3                        | 12.1%                 | 15.9%         | 9.7%                | 12.2%               | 10.5%                 | 9.7%          | 12.8%               | 10.3%               |
| 4                        | 31.5%                 | 40.5%         | 30.1%               | 31.2%               | 37.1%                 | 35.6%         | 49.8%               | 36.0%               |
| 5 = Extremely satisfied  | 56.0%                 | 41.5%         | 57.5%               | 56.6%               | 52.3%                 | 50.3%         | 37.4%               | 53.7%               |
| <b>MEAN</b>              | <b>4.43</b>           | <b>4.22</b>   | <b>4.40</b>         | <b>4.44</b>         | <b>4.42</b>           | <b>4.32</b>   | <b>4.25</b>         | <b>4.43</b>         |

|                          | BOAT TYPE 2011 SURVEY |                     |              |              |                       | BOAT TYPE 2012 SURVEY |                     |              |              |                       |
|--------------------------|-----------------------|---------------------|--------------|--------------|-----------------------|-----------------------|---------------------|--------------|--------------|-----------------------|
|                          | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE   | INBOARD      | SAILBOAT 19' & LARGER | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE   | INBOARD      | SAILBOAT 19' & LARGER |
| n=                       | 20                    | 23                  | 13           | 9            | 0                     | 33                    | 31                  | 23           | 18           | 1                     |
| <b>NET: TOP 2 BOX</b>    | <b>82.7%</b>          | <b>98.0%</b>        | <b>71.0%</b> | <b>96.4%</b> | <b>100.0%</b>         | <b>98.6%</b>          | <b>84.6%</b>        | <b>98.6%</b> | <b>72.6%</b> | <b>55.1%</b>          |
| 1 = Not at all satisfied | —                     | —                   | —            | 2.2%         | —                     | —                     | —                   | —            | —            | —                     |
| 2                        | —                     | —                   | —            | 0.7%         | —                     | —                     | —                   | 0.3%         | 0.3%         | —                     |
| 3                        | 17.3%                 | 2.0%                | 29.0%        | 0.7%         | 1.4%                  | 15.4%                 | 1.1%                | 27.1%        | 44.9%        | —                     |
| 4                        | 19.2%                 | 48.1%               | 2.4%         | 61.6%        | 27.6%                 | 35.1%                 | 42.0%               | 30.0%        | 43.1%        | 12.8%                 |
| 5 = Extremely satisfied  | 63.4%                 | 49.9%               | 68.5%        | 34.8%        | 72.4%                 | 63.5%                 | 42.6%               | 68.6%        | 29.5%        | 42.3%                 |
| <b>MEAN</b>              | <b>4.46</b>           | <b>4.48</b>         | <b>4.39</b>  | <b>4.26</b>  | <b>4.72</b>           | <b>4.62</b>           | <b>4.27</b>         | <b>4.67</b>  | <b>4.02</b>  | <b>3.98</b>           |

|                          | AMOUNT SPENT 2011 SURVEY |               |              | AMOUNT SPENT 2012 SURVEY |               |              |
|--------------------------|--------------------------|---------------|--------------|--------------------------|---------------|--------------|
|                          | \$500 OR LESS            | \$501-\$1,000 | \$1,000+     | \$500 OR LESS            | \$501-\$1,000 | \$1,000+     |
| n=                       | 26                       | 17            | 33           | 17                       | 22            | 67           |
| <b>NET: TOP 2 BOX</b>    | <b>98.9%</b>             | <b>76.4%</b>  | <b>76.3%</b> | <b>96.5%</b>             | <b>99.2%</b>  | <b>84.4%</b> |
| 1 = Not at all satisfied | —                        | 1.1%          | 0.6%         | —                        | —             | —            |
| 2                        | —                        | —             | 0.2%         | 0.4%                     | —             | 0.1%         |
| 3                        | 1.1%                     | 22.5%         | 22.9%        | 3.1%                     | 0.8%          | 15.5%        |
| 4                        | 32.5%                    | 19.6%         | 27.1%        | 20.6%                    | 38.9%         | 40.7%        |
| 5 = Extremely satisfied  | 66.4%                    | 56.8%         | 49.2%        | 75.9%                    | 60.2%         | 43.7%        |
| <b>MEAN</b>              | <b>4.65</b>              | <b>4.31</b>   | <b>4.24</b>  | <b>4.72</b>              | <b>4.59</b>   | <b>4.28</b>  |

## 18.2 Product Category Results

SOURCE: FORESIGHT RESEARCH INC.

### 18.2a Accessories purchased by type

**Respondents were asked which categories of boating accessories they purchased in 2012.**

Safety, boat maintenance and repair, anchoring/mooring, engine maintenance and repair, and cover/tops remain the top five product categories of boating accessories purchased in 2012.

**TABLE 18.2a**

|                                      | OWNERSHIP 2011 SURVEY |               |                     |                     | TOTAL | OWNERSHIP 2012 SURVEY |               |                     |                     |
|--------------------------------------|-----------------------|---------------|---------------------|---------------------|-------|-----------------------|---------------|---------------------|---------------------|
|                                      | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER |       | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER |
| n=                                   | 3,000                 | 60            | 240                 | 2,700               | 3,039 | 61                    | 244           | 2,734               |                     |
| Safety (7)                           | 28.7%                 | 40.3%         | 39.3%               | 27.5%               | 31.7% | 42.0%                 | 42.5%         | 30.5%               |                     |
| Boat maintenance and repair (19)     | 25.2%                 | 23.0%         | 36.6%               | 24.3%               | 28.6% | 23.0%                 | 35.6%         | 28.1%               |                     |
| Anchoring/mooring (17)               | 24.1%                 | 35.9%         | 33.3%               | 23.0%               | 28.0% | 36.1%                 | 33.0%         | 27.3%               |                     |
| Engine maintenance and repair (20)   | 24.4%                 | 16.8%         | 28.4%               | 24.2%               | 26.7% | 13.4%                 | 29.7%         | 26.7%               |                     |
| Covers and tops (11)                 | 18.0%                 | 26.0%         | 22.4%               | 17.5%               | 22.3% | 25.9%                 | 22.9%         | 22.1%               |                     |
| Navigation (electronics) (1)         | 16.4%                 | 33.1%         | 21.2%               | 15.6%               | 20.4% | 33.6%                 | 19.5%         | 20.2%               |                     |
| Watersports (9)                      | 14.2%                 | 28.2%         | 20.6%               | 13.3%               | 17.2% | 23.7%                 | 21.1%         | 16.7%               |                     |
| Trailer (8)                          | 16.1%                 | 20.9%         | 25.8%               | 15.2%               | 16.4% | 25.2%                 | 25.5%         | 15.4%               |                     |
| Electrical/panels (3)                | 13.8%                 | 13.1%         | 19.0%               | 13.4%               | 15.5% | 11.8%                 | 16.9%         | 15.4%               |                     |
| Seating (15)                         | 12.3%                 | 20.6%         | 21.9%               | 11.2%               | 14.0% | 22.7%                 | 19.6%         | 13.3%               |                     |
| Fishing hardware (bolt-on only) (14) | 14.5%                 | 24.6%         | 18.8%               | 13.9%               | 13.9% | 22.3%                 | 16.3%         | 13.5%               |                     |
| Lighting (6)                         | 11.0%                 | 21.9%         | 16.9%               | 10.2%               | 10.8% | 18.3%                 | 15.3%         | 10.3%               |                     |
| Entertainment (electronics) (5)      | 9.9%                  | 21.0%         | 15.3%               | 9.2%                | 10.1% | 18.8%                 | 14.2%         | 9.5%                |                     |
| Dock installation/equipment (18)     | 6.1%                  | 13.4%         | 8.4%                | 5.7%                | 8.8%  | 14.1%                 | 8.8%          | 8.7%                |                     |
| Bolt-on hardware (16)                | 7.6%                  | 11.3%         | 11.2%               | 7.2%                | 6.7%  | 11.2%                 | 10.5%         | 6.2%                |                     |
| Plumbing/water systems (13)          | 5.5%                  | 8.0%          | 8.8%                | 5.1%                | 6.3%  | 6.3%                  | 7.6%          | 6.2%                |                     |
| Navigation (instruments) (2)         | 4.7%                  | 12.1%         | 6.6%                | 4.3%                | 5.3%  | 12.3%                 | 5.6%          | 5.2%                |                     |
| Gauges (4)                           | 4.3%                  | 11.0%         | 8.5%                | 3.8%                | 4.6%  | 10.0%                 | 6.5%          | 4.3%                |                     |
| Galley equipment (10)                | 3.2%                  | 9.7%          | 4.5%                | 2.9%                | 3.5%  | 7.1%                  | 5.1%          | 3.3%                |                     |
| Heating/Cooling (12)                 | 1.7%                  | 10.9%         | 2.8%                | 1.4%                | 1.7%  | 8.0%                  | 1.8%          | 1.5%                |                     |
| None of the above                    | 25.1%                 | 7.7%          | 14.5%               | 26.4%               | 21.9% | 5.8%                  | 16.4%         | 22.7%               |                     |

|                                    | BOAT TYPE 2011 SURVEY |                     |            |         |                       | BOAT TYPE 2012 SURVEY |                     |            |         |                       |
|------------------------------------|-----------------------|---------------------|------------|---------|-----------------------|-----------------------|---------------------|------------|---------|-----------------------|
|                                    | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE | INBOARD | SAILBOAT 19' & LARGER | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE | INBOARD | SAILBOAT 19' & LARGER |
| n=                                 | 1,260                 | 852                 | 477        | 375     | 36                    | 1,276                 | 863                 | 483        | 380     | 36                    |
| Safety (7)                         | 25.8%                 | 31.2%               | 32.9%      | 25.6%   | 47.6%                 | 25.2%                 | 35.2%               | 37.2%      | 37.8%   | 37.5%                 |
| Boat maintenance and repair (19)   | 17.3%                 | 29.5%               | 34.0%      | 27.4%   | 62.7%                 | 18.3%                 | 34.8%               | 34.8%      | 37.3%   | 64.8%                 |
| Anchoring/mooring (17)             | 26.2%                 | 22.6%               | 20.7%      | 24.4%   | 28.7%                 | 30.4%                 | 27.3%               | 23.3%      | 26.5%   | 35.4%                 |
| Engine maintenance and repair (20) | 19.3%                 | 25.0%               | 32.7%      | 28.4%   | 37.4%                 | 21.1%                 | 27.6%               | 38.1%      | 27.8%   | 35.9%                 |
| Covers and tops (11)               | 15.2%                 | 20.0%               | 19.1%      | 21.5%   | 20.7%                 | 17.7%                 | 26.0%               | 23.2%      | 27.8%   | 23.3%                 |
| Navigation (electronics)           | 15.1%                 | 19.5%               | 14.1%      | 15.1%   | 28.9%                 | 16.6%                 | 24.1%               | 20.4%      | 23.3%   | 36.7%                 |
| Watersports (9)                    | 9.2%                  | 14.5%               | 15.8%      | 29.2%   | 3.9%                  | 10.8%                 | 14.0%               | 28.6%      | 32.9%   | 0.9%                  |
| Trailer (8)                        | 16.3%                 | 19.9%               | 16.5%      | 7.4%    | 6.3%                  | 15.6%                 | 17.9%               | 17.4%      | 14.8%   | 10.1%                 |
| Electrical/panels (3)              | 14.4%                 | 15.4%               | 13.1%      | 8.5%    | 20.2%                 | 13.1%                 | 15.9%               | 17.5%      | 19.7%   | 17.0%                 |
| Seating (15)                       | 15.3%                 | 12.9%               | 8.2%       | 5.9%    | 14.5%                 | 17.4%                 | 16.2%               | 6.9%       | 6.8%    | 11.4%                 |
| Fishing hardware (bolt-on only)    | 18.6%                 | 16.9%               | 6.9%       | 6.0%    | 6.0%                  | 15.5%                 | 18.8%               | 6.5%       | 7.6%    | 3.8%                  |
| Lighting (6)                       | 9.9%                  | 12.5%               | 12.5%      | 7.9%    | 20.6%                 | 10.1%                 | 13.0%               | 7.6%       | 11.3%   | 22.2%                 |
| Entertainment (electronics) (5)    | 7.2%                  | 8.7%                | 16.1%      | 13.3%   | 15.5%                 | 4.5%                  | 11.3%               | 14.1%      | 20.3%   | 16.6%                 |
| Dock installation/equipment (18)   | 4.6%                  | 4.7%                | 11.2%      | 6.7%    | 14.1%                 | 6.5%                  | 7.7%                | 10.8%      | 16.5%   | 10.0%                 |
| Bolt-on hardware (16)              | 7.1%                  | 7.8%                | 8.5%       | 6.6%    | 19.1%                 | 6.3%                  | 7.2%                | 5.6%       | 7.9%    | 11.0%                 |
| Plumbing/water systems (13)        | 2.8%                  | 5.6%                | 11.3%      | 5.5%    | 17.8%                 | 4.4%                  | 6.4%                | 6.0%       | 12.2%   | 11.8%                 |
| Navigation (instruments) (2)       | 3.0%                  | 6.5%                | 4.6%       | 5.5%    | 10.1%                 | 3.2%                  | 6.3%                | 7.9%       | 5.3%    | 23.2%                 |
| Gauges (4)                         | 2.9%                  | 5.0%                | 6.5%       | 5.0%    | 3.4%                  | 2.4%                  | 4.6%                | 7.4%       | 8.4%    | 2.5%                  |
| Galley equipment (10)              | 2.3%                  | 1.3%                | 6.0%       | 4.6%    | 29.1%                 | 1.7%                  | 1.5%                | 6.9%       | 8.3%    | 21.7%                 |
| Heating/cooling (12)               | 0.6%                  | 1.8%                | 4.0%       | 1.6%    | 9.2%                  | 0.9%                  | 1.5%                | 2.1%       | 3.4%    | 7.6%                  |
| None of the above                  | 29.5%                 | 22.9%               | 19.7%      | 23.7%   | 8.0%                  | 27.2%                 | 17.1%               | 21.6%      | 16.2%   | 9.5%                  |



**TABLE 18.2a Continued**

|                                      | AMOUNT SPENT 2011 SURVEY |               |          | AMOUNT SPENT 2012 SURVEY |               |          |
|--------------------------------------|--------------------------|---------------|----------|--------------------------|---------------|----------|
|                                      | \$500 OR LESS            | \$501-\$1,000 | \$1,000+ | \$500 OR LESS            | \$501-\$1,000 | \$1,000+ |
| n=                                   | 1,468                    | 355           | 551      | 1,184                    | 479           | 708      |
| Safety (7)                           | 32.9%                    | 47.6%         | 48.7%    | 30.1%                    | 48.3%         | 52.6%    |
| Boat maintenance and repair (19)     | 29.9%                    | 42.6%         | 38.9%    | 26.2%                    | 43.7%         | 48.7%    |
| Anchoring/mooring (17)               | 27.8%                    | 40.0%         | 41.6%    | 28.2%                    | 41.4%         | 44.4%    |
| Engine maintenance and repair (20)   | 30.7%                    | 33.4%         | 34.9%    | 26.4%                    | 37.9%         | 44.7%    |
| Covers and tops (11)                 | 15.8%                    | 35.1%         | 42.4%    | 16.5%                    | 32.5%         | 45.6%    |
| Navigation (electronics) (1)         | 13.8%                    | 29.0%         | 40.6%    | 10.8%                    | 37.9%         | 43.5%    |
| Watersports (9)                      | 14.7%                    | 29.1%         | 26.2%    | 16.6%                    | 25.6%         | 28.7%    |
| Trailer (8)                          | 18.3%                    | 25.1%         | 28.0%    | 16.9%                    | 22.8%         | 26.1%    |
| Electrical/panels (3)                | 15.4%                    | 22.0%         | 25.6%    | 15.1%                    | 17.1%         | 29.2%    |
| Seating (15)                         | 12.6%                    | 18.6%         | 25.6%    | 16.7%                    | 16.7%         | 20.4%    |
| Fishing hardware (bolt-on only) (14) | 15.0%                    | 26.1%         | 29.2%    | 11.9%                    | 23.9%         | 23.5%    |
| Lighting (6)                         | 11.2%                    | 14.6%         | 23.8%    | 8.2%                     | 14.9%         | 22.2%    |
| Entertainment (electronics) (5)      | 6.1%                     | 22.1%         | 29.6%    | 3.0%                     | 14.9%         | 28.1%    |
| Dock installation/equipment (18)     | 4.6%                     | 10.1%         | 17.9%    | 3.8%                     | 8.8%          | 25.0%    |
| Bolt-on hardware (16)                | 6.7%                     | 13.0%         | 18.1%    | 4.4%                     | 9.5%          | 14.8%    |
| Plumbing/water systems (13)          | 5.0%                     | 8.0%          | 13.8%    | 6.0%                     | 5.5%          | 13.2%    |
| Navigation (instruments) (2)         | 2.4%                     | 8.7%          | 14.7%    | 3.2%                     | 6.8%          | 13.0%    |
| Gauges (4)                           | 3.1%                     | 7.0%          | 12.3%    | 3.3%                     | 3.4%          | 11.8%    |
| Galley equipment (10)                | 2.5%                     | 5.2%          | 8.9%     | 1.0%                     | 5.5%          | 9.9%     |
| Heating/cooling (12)                 | 0.5%                     | 3.1%          | 7.6%     | 0.3%                     | 1.7%          | 5.4%     |

**NOTE:** For sections 18.2b–18.2u boat owners were asked to categorize specific 2012 accessory purchases as add-on, Repair/replacement, or upgrade.

**18.2b Safety accessory products purchased by type**

Nearly 6 of 10 (58%) boating safety accessory products purchased in 2012 were add-ons to existing boat equipment. New boat buyers were more likely to augment their boat with safety products; 73% indicated they purchased safety products as add-on accessories.

**TABLE 18.2b**

|                    | OWNERSHIP 2011 SURVEY |               |                     |                     | OWNERSHIP 2012 SURVEY |               |                     |                     |
|--------------------|-----------------------|---------------|---------------------|---------------------|-----------------------|---------------|---------------------|---------------------|
|                    | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER |
| n=                 | 861                   | 24            | 94                  | 742                 | 963                   | 26            | 104                 | 834                 |
| Add-on             | 56.0%                 | 66.2%         | 58.1%               | 55.4%               | 57.7%                 | 73.3%         | 54.1%               | 57.7%               |
| Repair/replacement | 27.2%                 | 10.0%         | 25.9%               | 27.9%               | 26.4%                 | 6.8%          | 29.6%               | 26.5%               |
| Upgrade            | 16.8%                 | 23.7%         | 16.0%               | 16.6%               | 15.9%                 | 19.9%         | 16.3%               | 15.8%               |
| <b>TOTAL</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       |

|                    | BOAT TYPE 2011 SURVEY |                     |               |               |                       | BOAT TYPE 2012 SURVEY |                     |               |               |                       |
|--------------------|-----------------------|---------------------|---------------|---------------|-----------------------|-----------------------|---------------------|---------------|---------------|-----------------------|
|                    | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER |
| n=                 | 325                   | 266                 | 157           | 96            | 17                    | 322                   | 304                 | 180           | 144           | 14                    |
| Add-on             | 55.5%                 | 55.6%               | 58.7%         | 57.2%         | 42.5%                 | 61.5%                 | 58.5%               | 49.0%         | 58.8%         | 54.1%                 |
| Repair/replacement | 26.9%                 | 26.7%               | 26.7%         | 28.3%         | 39.3%                 | 24.7%                 | 26.8%               | 31.7%         | 22.2%         | 28.5%                 |
| Upgrade            | 17.6%                 | 17.7%               | 14.7%         | 14.6%         | 18.2%                 | 13.8%                 | 14.7%               | 19.3%         | 19.0%         | 17.4%                 |
| <b>TOTAL</b>       | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         |

**TABLE 18.2b Continued**

|                    | AMOUNT SPENT 2011 SURVEY |               |               | AMOUNT SPENT 2012 SURVEY |               |               |
|--------------------|--------------------------|---------------|---------------|--------------------------|---------------|---------------|
|                    | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      |
| n=                 | 483                      | 169           | 268           | 356                      | 232           | 372           |
| Add-on             | 55.0%                    | 51.8%         | 59.9%         | 58.5%                    | 53.3%         | 59.4%         |
| Repair/replacement | 33.0%                    | 24.4%         | 17.5%         | 34.1%                    | 18.9%         | 23.8%         |
| Upgrade            | 12.0%                    | 23.8%         | 22.6%         | 7.4%                     | 27.8%         | 16.8%         |
| <b>TOTAL</b>       | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> |

**18.2c Boat maintenance and repair accessory products purchased by type**

As would be expected, 2/3 of the boat maintenance and repair products purchased by boat owners in 2012 were for replacements and/or repairs of existing equipment.

**TABLE 18.2c**

|                    | OWNERSHIP 2011 SURVEY |               |                     |                     | OWNERSHIP 2012 SURVEY |               |                     |                     |
|--------------------|-----------------------|---------------|---------------------|---------------------|-----------------------|---------------|---------------------|---------------------|
|                    | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER |
| n=                 | 757                   | 14            | 88                  | 655                 | 868                   | 14            | 87                  | 767                 |
| Add-on             | 17.5%                 | 58.4%         | 23.5%               | 15.8%               | 25.9%                 | 55.5%         | 18.2%               | 26.2%               |
| Repair/replacement | 70.8%                 | 23.2%         | 66.6%               | 72.3%               | 65.9%                 | 29.8%         | 70.2%               | 66.1%               |
| Upgrade            | 11.8%                 | 18.4%         | 9.9%                | 11.9%               | 8.2%                  | 14.7%         | 11.6%               | 7.7%                |
| <b>TOTAL</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       |

|                    | BOAT TYPE 2011 SURVEY |                     |               |               |                       | BOAT TYPE 2012 SURVEY |                     |               |               |                       |
|--------------------|-----------------------|---------------------|---------------|---------------|-----------------------|-----------------------|---------------------|---------------|---------------|-----------------------|
|                    | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER |
| n=                 | 218                   | 251                 | 162           | 103           | 23                    | 234                   | 300                 | 168           | 142           | 24                    |
| Add-on             | 25.0%                 | 11.4%               | 17.9%         | 15.8%         | 16.9%                 | 28.3%                 | 22.7%               | 33.8%         | 20.2%         | 21.7%                 |
| Repair/replacement | 64.7%                 | 76.3%               | 68.3%         | 74.1%         | 69.9%                 | 65.4%                 | 70.4%               | 58.6%         | 65.0%         | 72.4%                 |
| Upgrade            | 10.3%                 | 12.3%               | 13.7%         | 10.1%         | 13.2%                 | 6.3%                  | 6.9%                | 7.6%          | 14.8%         | 5.9%                  |
| <b>TOTAL</b>       | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         |

|                    | AMOUNT SPENT 2011 SURVEY |               |               | AMOUNT SPENT 2012 SURVEY |               |               |
|--------------------|--------------------------|---------------|---------------|--------------------------|---------------|---------------|
|                    | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      |
| n=                 | 439                      | 151           | 215           | 310                      | 210           | 345           |
| Add-on             | 17.4%                    | 15.2%         | 23.3%         | 24.9%                    | 24.2%         | 27.2%         |
| Repair/replacement | 74.4%                    | 70.4%         | 60.4%         | 70.0%                    | 65.6%         | 63.0%         |
| Upgrade            | 8.2%                     | 14.4%         | 16.3%         | 5.1%                     | 10.2%         | 9.8%          |
| <b>TOTAL</b>       | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> |

## 18.2d Engine maintenance and repair accessory products purchased by type

Similar to boat maintenance products, more than 3/4 of the engine maintenance and repair products purchased by boat owners in 2012 were for replacements and/or repairs of existing equipment.

**TABLE 18.2d**

|                    | OWNERSHIP 2011 SURVEY |               |                     |                     | OWNERSHIP 2012 SURVEY |               |                     |                     |
|--------------------|-----------------------|---------------|---------------------|---------------------|-----------------------|---------------|---------------------|---------------------|
|                    | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER |
| n=                 | 732                   | 10            | 68                  | 654                 | 810                   | 8             | 72                  | 730                 |
| Add-on             | 10.5%                 | 53.3%         | 13.6%               | 9.5%                | 16.3%                 | 51.3%         | 14.5%               | 16.0%               |
| Repair/replacement | 82.9%                 | 32.3%         | 79.4%               | 84.1%               | 77.0%                 | 33.4%         | 78.1%               | 77.4%               |
| Upgrade            | 6.6%                  | 14.5%         | 7.1%                | 6.4%                | 6.7%                  | 15.3%         | 7.4%                | 6.6%                |
| <b>TOTAL</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       |

|                    | BOAT TYPE 2011 SURVEY |                     |               |               |                       | BOAT TYPE 2012 SURVEY |                     |               |               |                       |
|--------------------|-----------------------|---------------------|---------------|---------------|-----------------------|-----------------------|---------------------|---------------|---------------|-----------------------|
|                    | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER |
| n=                 | 243                   | 213                 | 156           | 107           | 13                    | 269                   | 238                 | 184           | 106           | 13                    |
| Add-on             | 13.9%                 | 11.6%               | 6.3%          | 6.0%          | 14.0%                 | 18.1%                 | 18.8%               | 16.9%         | 3.8%          | 23.9%                 |
| Repair/replacement | 80.6%                 | 81.8%               | 85.5%         | 86.8%         | 84.2%                 | 76.7%                 | 74.8%               | 77.8%         | 82.9%         | 65.5%                 |
| Upgrade            | 5.5%                  | 6.7%                | 8.2%          | 7.2%          | 1.8%                  | 5.2%                  | 6.4%                | 5.3%          | 13.3%         | 10.6%                 |
| <b>TOTAL</b>       | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         |

|                    | AMOUNT SPENT 2011 SURVEY |               |               | AMOUNT SPENT 2012 SURVEY |               |               |
|--------------------|--------------------------|---------------|---------------|--------------------------|---------------|---------------|
|                    | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      |
| n=                 | 451                      | 118           | 192           | 313                      | 181           | 316           |
| Add-on             | 10.0%                    | 3.7%          | 15.9%         | 14.4%                    | 16.8%         | 17.7%         |
| Repair/replacement | 86.4%                    | 87.0%         | 71.3%         | 78.7%                    | 75.9%         | 76.0%         |
| Upgrade            | 3.6%                     | 9.4%          | 12.8%         | 6.9%                     | 7.3%          | 6.3%          |
| <b>TOTAL</b>       | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> |

## 18.2e Anchoring/mooring accessory products purchased by type

Nearly 6 of 10 anchoring and mooring accessory products purchased by boat owners in 2012 were add-ons to the existing boat equipment; 24% were replacements and/or repairs.

**TABLE 18.2e**

|                    | OWNERSHIP 2011 SURVEY |               |                     |                     | OWNERSHIP 2012 SURVEY |               |                     |                     |
|--------------------|-----------------------|---------------|---------------------|---------------------|-----------------------|---------------|---------------------|---------------------|
|                    | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER |
| n=                 | 722                   | 22            | 80                  | 621                 | 850                   | 22            | 80                  | 748                 |
| Add-on             | 55.4%                 | 65.1%         | 53.4%               | 55.4%               | 59.4%                 | 68.3%         | 49.5%               | 60.2%               |
| Repair/replacement | 28.7%                 | 10.9%         | 30.7%               | 29.0%               | 24.0%                 | 8.6%          | 33.4%               | 23.5%               |
| Upgrade            | 15.9%                 | 24.0%         | 15.9%               | 15.6%               | 16.6%                 | 23.1%         | 17.1%               | 16.3%               |
| <b>TOTAL</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       |

|                    | BOAT TYPE 2011 SURVEY |                     |               |               |                       | BOAT TYPE 2012 SURVEY |                     |               |               |                       |
|--------------------|-----------------------|---------------------|---------------|---------------|-----------------------|-----------------------|---------------------|---------------|---------------|-----------------------|
|                    | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER |
| n=                 | 330                   | 192                 | 99            | 91            | 10                    | 388                   | 236                 | 112           | 101           | 13                    |
| Add-on             | 58.8%                 | 54.9%               | 52.9%         | 51.2%         | 20.3%                 | 63.7%                 | 56.9%               | 61.1%         | 51.2%         | 22.8%                 |
| Repair/replacement | 29.2%                 | 31.4%               | 24.5%         | 23.9%         | 42.1%                 | 19.6%                 | 27.9%               | 24.5%         | 27.5%         | 56.7%                 |
| Upgrade            | 12.0%                 | 13.6%               | 22.5%         | 25.0%         | 37.6%                 | 16.7%                 | 15.2%               | 14.4%         | 21.3%         | 20.5%                 |
| <b>TOTAL</b>       | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         |

|                    | AMOUNT SPENT 2011 SURVEY |               |               | AMOUNT SPENT 2012 SURVEY |               |               |
|--------------------|--------------------------|---------------|---------------|--------------------------|---------------|---------------|
|                    | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      |
| n=                 | 408                      | 142           | 229           | 334                      | 198           | 315           |
| Add-on             | 63.7%                    | 49.0%         | 45.0%         | 59.8%                    | 59.3%         | 58.5%         |
| Repair/replacement | 26.4%                    | 35.5%         | 28.8%         | 26.0%                    | 20.1%         | 24.7%         |
| Upgrade            | 9.9%                     | 15.5%         | 26.2%         | 14.2%                    | 20.6%         | 16.8%         |
| <b>TOTAL</b>       | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> |

## 18.2f Covers and tops accessory products purchased by type

Half of the cover and top accessory products purchased by boat owners in 2012 were add-ons to existing boat equipment. Slightly more than 3 out of 10 were for replacement and/or repair of existing equipment.

**TABLE 18.2f**

|                    | OWNERSHIP 2011 SURVEY |               |                     |                     | OWNERSHIP 2012 SURVEY |               |                     |                     |
|--------------------|-----------------------|---------------|---------------------|---------------------|-----------------------|---------------|---------------------|---------------------|
|                    | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER |
| n=                 | 541                   | 16            | 54                  | 472                 | 677                   | 16            | 56                  | 605                 |
| Add-on             | 51.5%                 | 69.8%         | 52.1%               | 50.8%               | 51.2%                 | 73.3%         | 47.2%               | 51.0%               |
| Repair/replacement | 35.6%                 | 8.0%          | 26.9%               | 37.6%               | 32.0%                 | 4.9%          | 33.8%               | 32.5%               |
| Upgrade            | 12.9%                 | 22.2%         | 20.9%               | 11.6%               | 16.8%                 | 21.8%         | 19.0%               | 16.5%               |
| <b>TOTAL</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       |

|                    | BOAT TYPE 2011 SURVEY |                     |               |               |                       | BOAT TYPE 2012 SURVEY |                     |               |               |                       |
|--------------------|-----------------------|---------------------|---------------|---------------|-----------------------|-----------------------|---------------------|---------------|---------------|-----------------------|
|                    | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER |
| n=                 | 191                   | 170                 | 91            | 80            | 7                     | 226                   | 224                 | 112           | 106           | 8                     |
| Add-on             | 60.0%                 | 55.2%               | 45.0%         | 32.5%         | 33.2%                 | 51.8%                 | 59.1%               | 37.2%         | 48.0%         | 53.9%                 |
| Repair/replacement | 24.9%                 | 33.0%               | 48.3%         | 52.1%         | 38.4%                 | 33.0%                 | 26.0%               | 41.2%         | 33.1%         | 26.9%                 |
| Upgrade            | 15.1%                 | 11.8%               | 6.8%          | 15.4%         | 28.4%                 | 15.2%                 | 14.9%               | 21.6%         | 18.9%         | 19.2%                 |
| <b>TOTAL</b>       | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         |

|                    | AMOUNT SPENT 2011 SURVEY |               |               | AMOUNT SPENT 2012 SURVEY |               |               |
|--------------------|--------------------------|---------------|---------------|--------------------------|---------------|---------------|
|                    | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      |
| n=                 | 232                      | 124           | 234           | 195                      | 156           | 323           |
| Add-on             | 56.0%                    | 46.5%         | 49.7%         | 53.8%                    | 51.1%         | 49.3%         |
| Repair/replacement | 38.3%                    | 35.8%         | 31.5%         | 34.2%                    | 35.3%         | 29.3%         |
| Upgrade            | 5.7%                     | 17.7%         | 18.8%         | 12.0%                    | 13.6%         | 21.4%         |
| <b>TOTAL</b>       | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> |

## 18.2g Navigation (electronics) accessory products purchased by type

Nearly 2/3 of the navigation (electronics) accessory products purchased by boat owners in 2012 were add-ons to existing boat equipment; nearly 1/4 were to upgrade existing equipment.

**TABLE 18.2g**

|                    | OWNERSHIP 2011 SURVEY |               |                     |                     | OWNERSHIP 2012 SURVEY |               |                     |                     |
|--------------------|-----------------------|---------------|---------------------|---------------------|-----------------------|---------------|---------------------|---------------------|
|                    | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER |
| n=                 | 491                   | 20            | 51                  | 420                 | 621                   | 20            | 48                  | 553                 |
| Add-on             | 66.3%                 | 66.2%         | 54.7%               | 67.7%               | 65.4%                 | 69.6%         | 54.5%               | 66.2%               |
| Repair/replacement | 12.1%                 | 5.0%          | 16.5%               | 11.9%               | 10.4%                 | 6.6%          | 14.6%               | 10.2%               |
| Upgrade            | 21.5%                 | 28.8%         | 28.8%               | 20.3%               | 24.2%                 | 23.8%         | 30.9%               | 23.6%               |
| <b>TOTAL</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       |

|                    | BOAT TYPE 2011 SURVEY |                     |               |               |                       | BOAT TYPE 2012 SURVEY |                     |               |               |                       |
|--------------------|-----------------------|---------------------|---------------|---------------|-----------------------|-----------------------|---------------------|---------------|---------------|-----------------------|
|                    | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER |
| n=                 | 190                   | 166                 | 67            | 57            | 10                    | 212                   | 208                 | 99            | 89            | 13                    |
| Add-on             | 73.0%                 | 62.9%               | 62.5%         | 56.9%         | 75.0%                 | 71.1%                 | 67.0%               | 71.1%         | 43.6%         | 54.4%                 |
| Repair/replacement | 15.0%                 | 10.5%               | 14.8%         | 6.1%          | 1.4%                  | 10.7%                 | 7.1%                | 9.7%          | 16.2%         | 24.5%                 |
| Upgrade            | 12.1%                 | 26.6%               | 22.7%         | 36.9%         | 23.6%                 | 18.2%                 | 25.9%               | 19.2%         | 40.2%         | 21.1%                 |
| <b>TOTAL</b>       | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         |

|                    | AMOUNT SPENT 2011 SURVEY |               |               | AMOUNT SPENT 2012 SURVEY |               |               |
|--------------------|--------------------------|---------------|---------------|--------------------------|---------------|---------------|
|                    | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      |
| n=                 | 203                      | 103           | 224           | 128                      | 182           | 308           |
| Add-on             | 71.3%                    | 65.1%         | 63.3%         | 69.5%                    | 71.9%         | 59.6%         |
| Repair/replacement | 15.6%                    | 17.8%         | 7.2%          | 17.9%                    | 9.7%          | 7.8%          |
| Upgrade            | 13.1%                    | 17.0%         | 29.5%         | 12.6%                    | 18.4%         | 32.6%         |
| <b>TOTAL</b>       | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> |

## 18.2h Trailing accessory products purchased by type

4 of 10 trailing accessory products purchased by boat owners in 2012 were for repairs/replacements of existing equipment.

**TABLE 18.2h**

|                    | OWNERSHIP 2011 SURVEY |               |                     |                     | OWNERSHIP 2012 SURVEY |               |                     |                     |
|--------------------|-----------------------|---------------|---------------------|---------------------|-----------------------|---------------|---------------------|---------------------|
|                    | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER |
| n=                 | 483                   | 13            | 62                  | 409                 | 498                   | 15            | 62                  | 420                 |
| Add-on             | 41.0%                 | 63.1%         | 29.9%               | 42.0%               | 37.3%                 | 65.4%         | 32.4%               | 37.0%               |
| Repair/replacement | 42.4%                 | 14.1%         | 51.9%               | 41.8%               | 44.0%                 | 14.5%         | 49.6%               | 44.2%               |
| Upgrade            | 16.7%                 | 22.8%         | 18.3%               | 16.2%               | 18.7%                 | 20.1%         | 18.0%               | 18.8%               |
| <b>TOTAL</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       |

|                    | BOAT TYPE 2011 SURVEY |                     |               |               |                       | BOAT TYPE 2012 SURVEY |                     |               |               |                       |
|--------------------|-----------------------|---------------------|---------------|---------------|-----------------------|-----------------------|---------------------|---------------|---------------|-----------------------|
|                    | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER |
| n=                 | 205                   | 170                 | 79            | 28            | 2                     | 199                   | 154                 | 84            | 56            | 4                     |
| Add-on             | 45.0%                 | 29.9%               | 54.5%         | 42.7%         | 13.4%                 | 35.6%                 | 35.2%               | 35.4%         | 52.1%         | 36.9%                 |
| Repair/replacement | 37.9%                 | 50.9%               | 37.0%         | 35.0%         | 85.6%                 | 45.1%                 | 51.0%               | 38.4%         | 28.7%         | 44.9%                 |
| Upgrade            | 17.1%                 | 19.2%               | 8.5%          | 22.3%         | 1.0%                  | 19.3%                 | 13.8%               | 26.2%         | 19.2%         | 18.2%                 |
| <b>TOTAL</b>       | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         |

|                    | AMOUNT SPENT 2011 SURVEY |               |               | AMOUNT SPENT 2012 SURVEY |               |               |
|--------------------|--------------------------|---------------|---------------|--------------------------|---------------|---------------|
|                    | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      |
| n=                 | 269                      | 89            | 154           | 200                      | 109           | 185           |
| Add-on             | 40.2%                    | 40.6%         | 44.0%         | 31.2%                    | 38.6%         | 43.9%         |
| Repair/replacement | 47.3%                    | 37.8%         | 35.4%         | 56.8%                    | 37.1%         | 33.0%         |
| Upgrade            | 12.6%                    | 21.6%         | 20.6%         | 12.0%                    | 24.3%         | 23.1%         |
| <b>TOTAL</b>       | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> |

## 18.2i Bolt-on fishing hardware accessory products purchased by type

7 of 10 bolt-on fishing hardware accessory products purchased by boat owners in 2012 were add-ons to existing boat equipment.

**TABLE 18.2i**

|                    | OWNERSHIP 2011 SURVEY |               |                     |                     | OWNERSHIP 2012 SURVEY |               |                     |                     |
|--------------------|-----------------------|---------------|---------------------|---------------------|-----------------------|---------------|---------------------|---------------------|
|                    | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER |
| n=                 | 436                   | 15            | 45                  | 376                 | 421                   | 14            | 40                  | 368                 |
| Add-on             | 73.1%                 | 74.6%         | 69.2%               | 73.6%               | 70.3%                 | 72.8%         | 66.5%               | 70.6%               |
| Repair/replacement | 10.0%                 | 5.8%          | 14.7%               | 9.5%                | 9.0%                  | 6.5%          | 17.3%               | 8.2%                |
| Upgrade            | 16.9%                 | 19.6%         | 16.1%               | 16.9%               | 20.7%                 | 20.7%         | 16.2%               | 21.2%               |
| <b>TOTAL</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       |

|                    | BOAT TYPE 2011 SURVEY |                     |               |               |                       | BOAT TYPE 2012 SURVEY |                     |               |               |                       |
|--------------------|-----------------------|---------------------|---------------|---------------|-----------------------|-----------------------|---------------------|---------------|---------------|-----------------------|
|                    | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER |
| n=                 | 235                   | 144                 | 33            | 23            | 2                     | 197                   | 163                 | 31            | 29            | 1                     |
| Add-on             | 78.9%                 | 67.2%               | 49.4%         | 84.4%         | 93.6%                 | 73.0%                 | 66.6%               | 75.0%         | 65.6%         | 97.8%                 |
| Repair/replacement | 9.7%                  | 10.8%               | 13.2%         | 2.5%          | 4.3%                  | 4.9%                  | 15.1%               | 3.5%          | 9.3%          | 0.0%                  |
| Upgrade            | 11.4%                 | 22.0%               | 37.4%         | 13.1%         | 2.1%                  | 22.1%                 | 18.3%               | 21.5%         | 25.1%         | 2.2%                  |
| <b>TOTAL</b>       | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         |

|                    | AMOUNT SPENT 2011 SURVEY |               |               | AMOUNT SPENT 2012 SURVEY |               |               |
|--------------------|--------------------------|---------------|---------------|--------------------------|---------------|---------------|
|                    | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      |
| n=                 | 221                      | 92            | 161           | 140                      | 115           | 166           |
| Add-on             | 80.3%                    | 69.7%         | 65.8%         | 72.3%                    | 72.4%         | 67.0%         |
| Repair/replacement | 9.8%                     | 12.7%         | 9.9%          | 12.7%                    | 11.1%         | 4.5%          |
| Upgrade            | 9.9%                     | 17.7%         | 24.3%         | 15.0%                    | 16.5%         | 28.5%         |
| <b>TOTAL</b>       | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> |

## 18.2j Water sports accessory products purchased by type

More than 7 of 10 water sports accessory products purchased by boat owners in 2012 were add-on products.

**TABLE 18.2j**

|                    | OWNERSHIP 2011 SURVEY |               |                     |                     | OWNERSHIP 2012 SURVEY |               |                     |                     |
|--------------------|-----------------------|---------------|---------------------|---------------------|-----------------------|---------------|---------------------|---------------------|
|                    | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER |
| n=                 | 425                   | 17            | 49                  | 359                 | 523                   | 14            | 52                  | 457                 |
| Add-on             | 76.2%                 | 71.4%         | 77.8%               | 76.1%               | 77.2%                 | 74.5%         | 74.3%               | 77.7%               |
| Repair/replacement | 10.1%                 | 6.5%          | 7.1%                | 10.7%               | 9.6%                  | 8.9%          | 11.5%               | 9.4%                |
| Upgrade            | 13.7%                 | 22.1%         | 15.0%               | 13.1%               | 13.2%                 | 16.6%         | 14.2%               | 12.9%               |
| <b>TOTAL</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       |

|                    | BOAT TYPE 2011 SURVEY |                     |               |               |                       | BOAT TYPE 2012 SURVEY |                     |               |               |                       |
|--------------------|-----------------------|---------------------|---------------|---------------|-----------------------|-----------------------|---------------------|---------------|---------------|-----------------------|
|                    | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER |
| n=                 | 116                   | 123                 | 75            | 110           | 1                     | 138                   | 121                 | 138           | 125           | 1                     |
| Add-on             | 77.8%                 | 81.7%               | 78.9%         | 66.3%         | 78.8%                 | 79.1%                 | 82.2%               | 67.2%         | 81.4%         | 75.5%                 |
| Repair/replacement | 10.6%                 | 6.9%                | 6.8%          | 15.6%         | 8.2%                  | 9.3%                  | 9.5%                | 13.0%         | 6.3%          | 14.7%                 |
| Upgrade            | 11.6%                 | 11.4%               | 14.3%         | 18.1%         | 12.9%                 | 11.6%                 | 8.3%                | 19.8%         | 12.3%         | 9.8%                  |
| <b>TOTAL</b>       | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         |

|                    | AMOUNT SPENT 2011 SURVEY |               |               | AMOUNT SPENT 2012 SURVEY |               |               |
|--------------------|--------------------------|---------------|---------------|--------------------------|---------------|---------------|
|                    | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      |
| n=                 | 217                      | 103           | 144           | 197                      | 123           | 203           |
| Add-on             | 76.8%                    | 74.5%         | 78.3%         | 73.4%                    | 76.3%         | 81.6%         |
| Repair/replacement | 14.6%                    | 5.3%          | 6.2%          | 15.4%                    | 7.2%          | 5.4%          |
| Upgrade            | 8.6%                     | 20.2%         | 15.5%         | 11.2%                    | 16.5%         | 13.0%         |
| <b>TOTAL</b>       | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> |

## 18.2k Electrical/panel accessory products purchased by type

Nearly 6 of 10 electrical/panel accessory products purchased in 2012 were repairs/replacements to existing boat equipment; more than 2 of 10 (23%) were purchased as add-ons.

**TABLE 18.2k**

|                    | OWNERSHIP 2011 SURVEY |               |                     |                     | OWNERSHIP 2012 SURVEY |               |                     |                     |
|--------------------|-----------------------|---------------|---------------------|---------------------|-----------------------|---------------|---------------------|---------------------|
|                    | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER |
| n=                 | 414                   | 8             | 46                  | 361                 | 470                   | 7             | 41                  | 422                 |
| Add-on             | 21.3%                 | 58.1%         | 20.8%               | 20.6%               | 23.0%                 | 51.8%         | 16.7%               | 23.1%               |
| Repair/replacement | 63.6%                 | 14.6%         | 64.0%               | 64.6%               | 59.0%                 | 20.5%         | 64.8%               | 59.1%               |
| Upgrade            | 15.0%                 | 27.3%         | 15.1%               | 14.8%               | 18.0%                 | 27.7%         | 18.5%               | 17.8%               |
| <b>TOTAL</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       |

|                    | BOAT TYPE 2011 SURVEY |                     |               |               |                       | BOAT TYPE 2012 SURVEY |                     |               |               |                       |
|--------------------|-----------------------|---------------------|---------------|---------------|-----------------------|-----------------------|---------------------|---------------|---------------|-----------------------|
|                    | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER |
| n=                 | 182                   | 131                 | 62            | 32            | 7                     | 168                   | 137                 | 84            | 75            | 6                     |
| Add-on             | 31.3%                 | 5.0%                | 28.6%         | 18.8%         | 15.4%                 | 34.9%                 | 13.7%               | 16.0%         | 20.8%         | 25.5%                 |
| Repair/replacement | 56.6%                 | 78.7%               | 48.7%         | 66.3%         | 82.0%                 | 50.9%                 | 65.0%               | 59.0%         | 66.0%         | 57.6%                 |
| Upgrade            | 12.1%                 | 16.3%               | 22.6%         | 14.9%         | 2.6%                  | 14.2%                 | 21.3%               | 25.0%         | 13.2%         | 16.9%                 |
| <b>TOTAL</b>       | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         |

|                    | AMOUNT SPENT 2011 SURVEY |               |               | AMOUNT SPENT 2012 SURVEY |               |               |
|--------------------|--------------------------|---------------|---------------|--------------------------|---------------|---------------|
|                    | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      |
| n=                 | 226                      | 78            | 141           | 178                      | 82            | 207           |
| Add-on             | 17.4%                    | 29.1%         | 26.8%         | 27.1%                    | 21.3%         | 18.9%         |
| Repair/replacement | 72.4%                    | 60.4%         | 48.3%         | 68.2%                    | 52.7%         | 54.4%         |
| Upgrade            | 10.2%                    | 10.5%         | 24.9%         | 4.7%                     | 26.0%         | 26.7%         |
| <b>TOTAL</b>       | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> |

## 18.2i Seating accessory products purchased by type

More than 4 of 10 seating accessory products purchased by boat owners in 2012 were for Repair/replacement of existing boat equipment; 1/3 were add-ons and 1/4 were upgrades to existing equipment

**TABLE 18.2i**

|                    | OWNERSHIP 2011 SURVEY |               |                     |                     | OWNERSHIP 2012 SURVEY |               |                     |                     |
|--------------------|-----------------------|---------------|---------------------|---------------------|-----------------------|---------------|---------------------|---------------------|
|                    | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER |
| n=                 | 368                   | 12            | 52                  | 304                 | 425                   | 14            | 48                  | 364                 |
| Add-on             | 32.6%                 | 49.7%         | 21.9%               | 33.8%               | 32.6%                 | 45.0%         | 17.5%               | 34.1%               |
| Repair/replacement | 43.5%                 | 9.0%          | 46.1%               | 44.4%               | 42.3%                 | 10.3%         | 54.8%               | 41.9%               |
| Upgrade            | 23.9%                 | 41.2%         | 31.9%               | 21.8%               | 25.1%                 | 44.7%         | 27.7%               | 24.0%               |
| <b>TOTAL</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       |

|                    | BOAT TYPE 2011 SURVEY |                     |               |               |                       | BOAT TYPE 2012 SURVEY |                     |               |               |                       |
|--------------------|-----------------------|---------------------|---------------|---------------|-----------------------|-----------------------|---------------------|---------------|---------------|-----------------------|
|                    | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER |
| n=                 | 193                   | 110                 | 39            | 22            | 5                     | 222                   | 140                 | 33            | 26            | 4                     |
| Add-on             | 41.6%                 | 20.4%               | 24.4%         | 23.8%         | 58.4%                 | 40.5%                 | 26.6%               | 19.2%         | 10.2%         | 61.5%                 |
| Repair/replacement | 32.4%                 | 60.9%               | 37.9%         | 65.2%         | 35.5%                 | 41.0%                 | 42.6%               | 40.4%         | 57.6%         | 20.8%                 |
| Upgrade            | 26.0%                 | 18.8%               | 37.8%         | 11.0%         | 6.1%                  | 18.5%                 | 30.8%               | 40.4%         | 32.2%         | 17.7%                 |
| <b>TOTAL</b>       | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         |

|                    | AMOUNT SPENT 2011 SURVEY |               |               | AMOUNT SPENT 2012 SURVEY |               |               |
|--------------------|--------------------------|---------------|---------------|--------------------------|---------------|---------------|
|                    | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      |
| n=                 | 185                      | 66            | 141           | 197                      | 80            | 145           |
| Add-on             | 38.7%                    | 26.5%         | 27.3%         | 37.7%                    | 24.3%         | 28.6%         |
| Repair/replacement | 44.8%                    | 48.9%         | 38.3%         | 42.6%                    | 49.8%         | 38.8%         |
| Upgrade            | 16.5%                    | 24.7%         | 34.4%         | 19.7%                    | 25.9%         | 32.6%         |
| <b>TOTAL</b>       | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> |

## 18.2m Lighting accessory products purchased by type

Nearly 4 of 10 lighting accessory products purchased by boat owners in 2012 were add-ons to existing boat equipment; one-third (33.9%) were for Repair/replacement and more than one-quarter (27%) were upgrades to existing equipment.

**TABLE 18.2m**

|                    | OWNERSHIP 2011 SURVEY |               |                     |                     | OWNERSHIP 2012 SURVEY |               |                     |                     |
|--------------------|-----------------------|---------------|---------------------|---------------------|-----------------------|---------------|---------------------|---------------------|
|                    | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER |
| n=                 | 329                   | 13            | 41                  | 275                 | 329                   | 11            | 37                  | 280                 |
| Add-on             | 33.2%                 | 50.9%         | 30.2%               | 32.8%               | 39.1%                 | 55.8%         | 32.9%               | 39.3%               |
| Repair/replacement | 46.2%                 | 13.3%         | 49.2%               | 47.3%               | 33.9%                 | 11.3%         | 47.0%               | 33.0%               |
| Upgrade            | 20.6%                 | 35.8%         | 20.7%               | 19.9%               | 27.0%                 | 32.9%         | 20.1%               | 27.7%               |
| <b>TOTAL</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       |

|                    | BOAT TYPE 2011 SURVEY |                     |               |               |                       | BOAT TYPE 2012 SURVEY |                     |               |               |                       |
|--------------------|-----------------------|---------------------|---------------|---------------|-----------------------|-----------------------|---------------------|---------------|---------------|-----------------------|
|                    | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER |
| n=                 | 125                   | 107                 | 60            | 30            | 7                     | 129                   | 112                 | 37            | 43            | 8                     |
| Add-on             | 40.4%                 | 20.9%               | 36.9%         | 40.6%         | 27.9%                 | 39.4%                 | 40.9%               | 46.5%         | 25.4%         | 47.5%                 |
| Repair/replacement | 40.4%                 | 61.1%               | 31.9%         | 40.4%         | 68.0%                 | 35.1%                 | 36.7%               | 24.0%         | 30.0%         | 41.4%                 |
| Upgrade            | 19.2%                 | 17.9%               | 31.2%         | 19.0%         | 4.1%                  | 25.5%                 | 22.4%               | 29.5%         | 44.6%         | 11.1%                 |
| <b>TOTAL</b>       | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         |

|                    | AMOUNT SPENT 2011 SURVEY |               |               | AMOUNT SPENT 2012 SURVEY |               |               |
|--------------------|--------------------------|---------------|---------------|--------------------------|---------------|---------------|
|                    | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      |
| n=                 | 165                      | 52            | 131           | 97                       | 71            | 157           |
| Add-on             | 29.0%                    | 33.8%         | 38.5%         | 28.7%                    | 37.8%         | 44.8%         |
| Repair/replacement | 53.1%                    | 56.9%         | 35.4%         | 49.3%                    | 35.5%         | 24.3%         |
| Upgrade            | 17.9%                    | 9.3%          | 26.1%         | 22.0%                    | 26.7%         | 30.9%         |
| <b>TOTAL</b>       | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> |



## 18.2n Entertainment (electronics) accessory products purchased by type

More than 4 of 10 electronic entertainment accessory products purchased by boat owners in 2012 were add-ons to existing equipment on the boat; more than one-third were upgrades to existing equipment.

**TABLE 18.2n**

|                    | OWNERSHIP 2011 SURVEY |               |                     |                     | OWNERSHIP 2012 SURVEY |               |                     |                     |
|--------------------|-----------------------|---------------|---------------------|---------------------|-----------------------|---------------|---------------------|---------------------|
|                    | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER |
| n=                 | 296                   | 13            | 37                  | 247                 | 306                   | 11            | 35                  | 260                 |
| Add-on             | 55.3%                 | 60.5%         | 45.9%               | 56.4%               | 44.3%                 | 51.3%         | 42.7%               | 44.2%               |
| Repair/replacement | 11.8%                 | 5.7%          | 16.3%               | 11.5%               | 20.1%                 | 7.3%          | 16.4%               | 21.2%               |
| Upgrade            | 32.9%                 | 33.8%         | 37.7%               | 32.1%               | 35.6%                 | 41.4%         | 40.9%               | 34.6%               |
| <b>TOTAL</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       |

|                    | BOAT TYPE 2011 SURVEY |                     |               |               |                       | BOAT TYPE 2012 SURVEY |                     |               |               |                       |
|--------------------|-----------------------|---------------------|---------------|---------------|-----------------------|-----------------------|---------------------|---------------|---------------|-----------------------|
|                    | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER |
| n=                 | 91                    | 74                  | 77            | 50            | 6                     | 58                    | 97                  | 68            | 77            | 6                     |
| Add-on             | 66.4%                 | 46.4%               | 55.7%         | 49.0%         | 43.9%                 | 37.1%                 | 59.8%               | 25.6%         | 45.0%         | 65.9%                 |
| Repair/replacement | 4.8%                  | 15.6%               | 17.6%         | 8.0%          | 31.4%                 | 26.2%                 | 13.6%               | 22.8%         | 22.2%         | 11.5%                 |
| Upgrade            | 28.7%                 | 38.1%               | 26.7%         | 43.0%         | 24.7%                 | 36.7%                 | 26.6%               | 51.6%         | 32.8%         | 22.6%                 |
| <b>TOTAL</b>       | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         |

|                    | AMOUNT SPENT 2011 SURVEY |               |               | AMOUNT SPENT 2012 SURVEY |               |               |
|--------------------|--------------------------|---------------|---------------|--------------------------|---------------|---------------|
|                    | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      |
| n=                 | 90                       | 78            | 163           | 36                       | 71            | 199           |
| Add-on             | 63.8%                    | 38.9%         | 55.5%         | 42.3%                    | 34.0%         | 48.3%         |
| Repair/replacement | 6.8%                     | 26.1%         | 12.6%         | 18.5%                    | 38.8%         | 13.8%         |
| Upgrade            | 29.3%                    | 35.1%         | 31.9%         | 39.2%                    | 27.2%         | 37.9%         |
| <b>TOTAL</b>       | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> |

## 18.2o Bolt-on hardware accessory products purchased by type

More than half of bolt-on hardware accessory products purchased by boat owners in 2012 were add-ons to existing boat equipment; more than 2 of 10 were for Repair/replacement of existing equipment.

**TABLE 18.2o**

|                    | OWNERSHIP 2011 SURVEY |               |                     |                     | OWNERSHIP 2012 SURVEY |               |                     |                     |
|--------------------|-----------------------|---------------|---------------------|---------------------|-----------------------|---------------|---------------------|---------------------|
|                    | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER |
| n=                 | 228                   | 7             | 27                  | 195                 | 203                   | 7             | 26                  | 170                 |
| Add-on             | 48.2%                 | 65.7%         | 41.3%               | 48.6%               | 55.3%                 | 60.4%         | 41.8%               | 57.1%               |
| Repair/replacement | 33.3%                 | 13.1%         | 43.5%               | 32.6%               | 23.3%                 | 12.9%         | 39.1%               | 21.4%               |
| Upgrade            | 18.5%                 | 21.2%         | 15.1%               | 18.9%               | 21.4%                 | 26.7%         | 19.1%               | 21.5%               |
| <b>TOTAL</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       |

|                    | BOAT TYPE 2011 SURVEY |                     |               |               |                       | BOAT TYPE 2012 SURVEY |                     |               |               |                       |
|--------------------|-----------------------|---------------------|---------------|---------------|-----------------------|-----------------------|---------------------|---------------|---------------|-----------------------|
|                    | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER |
| n=                 | 90                    | 67                  | 40            | 25            | 7                     | 80                    | 62                  | 27            | 30            | 4                     |
| Add-on             | 63.7%                 | 39.9%               | 35.3%         | 44.3%         | 16.3%                 | 58.0%                 | 58.2%               | 46.8%         | 55.9%         | 7.9%                  |
| Repair/replacement | 18.6%                 | 34.4%               | 54.0%         | 43.7%         | 55.6%                 | 26.5%                 | 27.4%               | 6.5%          | 18.5%         | 43.6%                 |
| Upgrade            | 17.7%                 | 25.7%               | 10.7%         | 11.9%         | 28.1%                 | 15.5%                 | 14.4%               | 46.7%         | 25.6%         | 48.5%                 |
| <b>TOTAL</b>       | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         |

|                    | AMOUNT SPENT 2011 SURVEY |               |               | AMOUNT SPENT 2012 SURVEY |               |               |
|--------------------|--------------------------|---------------|---------------|--------------------------|---------------|---------------|
|                    | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      |
| n=                 | 99                       | 46            | 100           | 53                       | 46            | 105           |
| Add-on             | 57.6%                    | 40.3%         | 46.4%         | 47.5%                    | 61.6%         | 56.4%         |
| Repair/replacement | 27.0%                    | 31.5%         | 39.3%         | 37.4%                    | 23.8%         | 16.0%         |
| Upgrade            | 15.5%                    | 28.3%         | 14.3%         | 15.1%                    | 14.6%         | 27.6%         |
| <b>TOTAL</b>       | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> |

## 18.2p Dockside installations and dockside equipment accessory products purchased by type

More than half of dock installation and/or dockside equipment accessory products purchased by boat owners in 2012 were add-ons to existing equipment.

**TABLE 18.2p**

|                    | OWNERSHIP 2011 SURVEY |               |                     |                     | OWNERSHIP 2012 SURVEY |               |                     |                     |
|--------------------|-----------------------|---------------|---------------------|---------------------|-----------------------|---------------|---------------------|---------------------|
|                    | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER |
| n=                 | 183                   | 8             | 20                  | 154                 | 268                   | 9             | 22                  | 237                 |
| Add-on             | 68.9%                 | 63.6%         | 53.7%               | 71.1%               | 53.2%                 | 67.5%         | 51.4%               | 52.9%               |
| Repair/replacement | 17.1%                 | 11.3%         | 25.3%               | 16.3%               | 22.2%                 | 9.5%          | 25.9%               | 22.3%               |
| Upgrade            | 14.0%                 | 25.1%         | 21.0%               | 12.6%               | 24.6%                 | 23.0%         | 22.7%               | 24.8%               |
| <b>TOTAL</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       |

|                    | BOAT TYPE 2011 SURVEY |                     |               |               |                       | BOAT TYPE 2012 SURVEY |                     |               |               |                       |
|--------------------|-----------------------|---------------------|---------------|---------------|-----------------------|-----------------------|---------------------|---------------|---------------|-----------------------|
|                    | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER |
| n=                 | 58                    | 40                  | 54            | 25            | 5                     | 82                    | 67                  | 52            | 63            | 4                     |
| Add-on             | 64.6%                 | 71.5%               | 73.6%         | 66.4%         | 58.7%                 | 62.1%                 | 48.6%               | 51.2%         | 47.7%         | 62.2%                 |
| Repair/replacement | 28.1%                 | 18.0%               | 8.1%          | 12.0%         | 2.7%                  | 14.8%                 | 24.1%               | 17.9%         | 33.5%         | 19.8%                 |
| Upgrade            | 7.3%                  | 10.5%               | 18.2%         | 21.6%         | 38.6%                 | 23.1%                 | 27.3%               | 30.9%         | 18.8%         | 18.0%                 |
| <b>TOTAL</b>       | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         |

|                    | AMOUNT SPENT 2011 SURVEY |               |               | AMOUNT SPENT 2012 SURVEY |               |               |
|--------------------|--------------------------|---------------|---------------|--------------------------|---------------|---------------|
|                    | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      |
| n=                 | 67                       | 36            | 99            | 45                       | 42            | 177           |
| Add-on             | 66.5%                    | 59.3%         | 71.3%         | 57.9%                    | 54.7%         | 50.8%         |
| Repair/replacement | 27.6%                    | 19.0%         | 12.2%         | 20.2%                    | 19.1%         | 23.9%         |
| Upgrade            | 5.9%                     | 21.7%         | 16.5%         | 21.9%                    | 26.2%         | 25.3%         |
| <b>TOTAL</b>       | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> |

## 18.2q Plumbing and water systems accessory products purchased by type

More than 6 of 10 plumbing and water system accessory products purchased by boat owners in 2012 were for Repair/replacement of existing boat equipment; more than 2 of 10 were add-ons to existing equipment.

**TABLE 18.2q**

|                    | OWNERSHIP 2011 SURVEY |               |                     |                     | OWNERSHIP 2012 SURVEY |               |                     |                     |
|--------------------|-----------------------|---------------|---------------------|---------------------|-----------------------|---------------|---------------------|---------------------|
|                    | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER |
| n=                 | 164                   | 5             | 21                  | 138                 | 191                   | 4             | 19                  | 169                 |
| Add-on             | 23.4%                 | 46.1%         | 19.7%               | 23.1%               | 22.0%                 | 50.0%         | 5.9%                | 23.2%               |
| Repair/replacement | 61.9%                 | 18.3%         | 65.1%               | 63.0%               | 63.8%                 | 13.4%         | 76.9%               | 63.4%               |
| Upgrade            | 14.7%                 | 35.6%         | 15.1%               | 13.9%               | 14.2%                 | 36.6%         | 17.2%               | 13.4%               |
| <b>TOTAL</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       |

|                    | BOAT TYPE 2011 SURVEY |                     |               |               |                       | BOAT TYPE 2012 SURVEY |                     |               |               |                       |
|--------------------|-----------------------|---------------------|---------------|---------------|-----------------------|-----------------------|---------------------|---------------|---------------|-----------------------|
|                    | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER |
| n=                 | 36                    | 48                  | 54            | 21            | 6                     | 56                    | 55                  | 29            | 46            | 4                     |
| Add-on             | 28.4%                 | 10.2%               | 31.9%         | 24.3%         | 18.6%                 | 30.8%                 | 36.8%               | 11.8%         | 0.9%          | 15.4%                 |
| Repair/replacement | 53.9%                 | 76.5%               | 50.0%         | 72.7%         | 64.2%                 | 68.2%                 | 50.4%               | 56.2%         | 78.8%         | 64.3%                 |
| Upgrade            | 17.7%                 | 13.4%               | 18.1%         | 3.0%          | 17.2%                 | 1.0%                  | 12.8%               | 32.0%         | 20.3%         | 20.3%                 |
| <b>TOTAL</b>       | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         |

|                    | AMOUNT SPENT 2011 SURVEY |               |               | AMOUNT SPENT 2012 SURVEY |               |               |
|--------------------|--------------------------|---------------|---------------|--------------------------|---------------|---------------|
|                    | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      |
| n=                 | 74                       | 28            | 76            | 72                       | 26            | 93            |
| Add-on             | 21.8%                    | 20.9%         | 27.4%         | 36.9%                    | 1.9%          | 16.3%         |
| Repair/replacement | 69.2%                    | 78.2%         | 50.0%         | 58.7%                    | 96.0%         | 58.6%         |
| Upgrade            | 9.1%                     | 0.9%          | 22.6%         | 4.4%                     | 2.1%          | 25.1%         |
| <b>TOTAL</b>       | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> |

## 18.2r Navigation (instruments) accessory products purchased by type

Nearly 6 of 10 navigation instrument accessory products purchased by boat owners in 2012 were add-ons to existing boat equipment; nearly 3 of 10 were upgrades to existing equipment.

**TABLE 18.2r**

|                    | OWNERSHIP 2011 SURVEY |               |                     |                     | OWNERSHIP 2012 SURVEY |               |                     |                     |
|--------------------|-----------------------|---------------|---------------------|---------------------|-----------------------|---------------|---------------------|---------------------|
|                    | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER |
| n=                 | 140                   | 7             | 16                  | 117                 | 162                   | 7             | 14                  | 141                 |
| Add-on             | 58.1%                 | 66.0%         | 44.1%               | 59.5%               | 56.8%                 | 59.3%         | 40.4%               | 58.4%               |
| Repair/replacement | 12.4%                 | 7.0%          | 28.7%               | 10.5%               | 14.3%                 | 9.8%          | 24.1%               | 13.5%               |
| Upgrade            | 29.5%                 | 26.9%         | 27.2%               | 30.0%               | 28.9%                 | 30.9%         | 35.5%               | 28.1%               |
| <b>TOTAL</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       |

|                    | BOAT TYPE 2011 SURVEY |                     |               |               |                       | BOAT TYPE 2012 SURVEY |                     |               |               |                       |
|--------------------|-----------------------|---------------------|---------------|---------------|-----------------------|-----------------------|---------------------|---------------|---------------|-----------------------|
|                    | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER |
| n=                 | 38                    | 55                  | 22            | 21            | 4                     | 41                    | 54                  | 38            | 20            | 8                     |
| Add-on             | 71.6%                 | 63.4%               | 27.5%         | 50.0%         | 65.8%                 | 53.9%                 | 56.9%               | 57.0%         | 58.0%         | 67.4%                 |
| Repair/replacement | 9.4%                  | 11.5%               | 9.4%          | 25.2%         | 2.6%                  | 8.5%                  | 8.9%                | 17.2%         | 34.5%         | 15.2%                 |
| Upgrade            | 19.1%                 | 25.1%               | 63.1%         | 24.8%         | 31.6%                 | 37.6%                 | 34.2%               | 25.8%         | 7.5%          | 17.4%                 |
| <b>TOTAL</b>       | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         |

|                    | AMOUNT SPENT 2011 SURVEY |               |               | AMOUNT SPENT 2012 SURVEY |               |               |
|--------------------|--------------------------|---------------|---------------|--------------------------|---------------|---------------|
|                    | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      |
| n=                 | 35                       | 31            | 81            | 37                       | 33            | 92            |
| Add-on             | 75.0%                    | 60.0%         | 52.8%         | 80.7%                    | 53.1%         | 48.5%         |
| Repair/replacement | 8.8%                     | 11.6%         | 14.1%         | 10.1%                    | 17.8%         | 14.7%         |
| Upgrade            | 16.2%                    | 28.4%         | 33.2%         | 9.2%                     | 29.1%         | 36.8%         |
| <b>TOTAL</b>       | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> |

## 18.2s Gauge accessory products purchased by type

8 of 10 gauge accessory products purchased by boat owners in 2012 were for repairs/replacement of existing boat equipment (40.1%) or add-ons to existing equipment (40.4%).

**TABLE 18.2s**

|                    | OWNERSHIP 2011 SURVEY |               |                     |                     | OWNERSHIP 2012 SURVEY |               |                     |                     |
|--------------------|-----------------------|---------------|---------------------|---------------------|-----------------------|---------------|---------------------|---------------------|
|                    | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER |
| n=                 | 130                   | 7             | 21                  | 103                 | 139                   | 6             | 16                  | 117                 |
| Add-on             | 36.3%                 | 50.2%         | 16.1%               | 39.4%               | 40.1%                 | 48.6%         | 14.3%               | 43.2%               |
| Repair/replacement | 41.0%                 | 13.7%         | 62.4%               | 38.5%               | 40.4%                 | 15.1%         | 62.6%               | 38.7%               |
| Upgrade            | 22.7%                 | 36.1%         | 21.5%               | 22.1%               | 19.5%                 | 36.3%         | 23.1%               | 18.1%               |
| <b>TOTAL</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       |

|                    | BOAT TYPE 2011 SURVEY |                     |               |               |                       | BOAT TYPE 2012 SURVEY |                     |               |               |                       |
|--------------------|-----------------------|---------------------|---------------|---------------|-----------------------|-----------------------|---------------------|---------------|---------------|-----------------------|
|                    | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER |
| n=                 | 37                    | 43                  | 31            | 19            | 1                     | 31                    | 40                  | 36            | 32            | 1                     |
| Add-on             | 58.6%                 | 35.6%               | 29.5%         | 3.2%          | 76.4%                 | 38.6%                 | 52.6%               | 50.4%         | 15.0%         | 22.3%                 |
| Repair/replacement | 23.5%                 | 51.3%               | 39.6%         | 55.8%         | 11.8%                 | 52.4%                 | 36.7%               | 32.7%         | 41.1%         | 72.0%                 |
| Upgrade            | 17.9%                 | 13.1%               | 30.9%         | 40.9%         | 11.8%                 | 9.0%                  | 10.7%               | 16.9%         | 43.9%         | 5.7%                  |
| <b>TOTAL</b>       | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         |

|                    | AMOUNT SPENT 2011 SURVEY |               |               | AMOUNT SPENT 2012 SURVEY |               |               |
|--------------------|--------------------------|---------------|---------------|--------------------------|---------------|---------------|
|                    | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      |
| n=                 | 46                       | 25            | 68            | 38                       | 16            | 84            |
| Add-on             | 29.0%                    | 40.8%         | 43.8%         | 45.3%                    | 53.4%         | 35.2%         |
| Repair/replacement | 56.2%                    | 56.8%         | 22.9%         | 53.3%                    | 16.5%         | 39.1%         |
| Upgrade            | 14.7%                    | 2.4%          | 33.3%         | 1.4%                     | 30.1%         | 25.7%         |
| <b>TOTAL</b>       | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> |

## 18.2t Galley equipment accessory products purchased by type

More than half of galley equipment accessory products purchased by boat owners in 2012 were add-ons to existing boat equipment; 32% were upgrades to existing equipment.

**TABLE 18.2t**

|                    | OWNERSHIP 2011 SURVEY |               |                     |                     | OWNERSHIP 2012 SURVEY |               |                     |                     |
|--------------------|-----------------------|---------------|---------------------|---------------------|-----------------------|---------------|---------------------|---------------------|
|                    | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER |
| n=                 | 96                    | 6             | 11                  | 79                  | 108                   | 4             | 12                  | 91                  |
| Add-on             | 54.2%                 | 57.7%         | 70.6%               | 51.7%               | 51.4%                 | 59.5%         | 68.4%               | 48.7%               |
| Repair/replacement | 6.6%                  | 13.9%         | 13.8%               | 5.0%                | 32.4%                 | 13.4%         | 16.7%               | 35.4%               |
| Upgrade            | 39.3%                 | 28.4%         | 15.6%               | 43.3%               | 16.2%                 | 27.1%         | 14.9%               | 15.9%               |
| <b>TOTAL</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       |

|                    | BOAT TYPE 2011 SURVEY |                     |               |               |                       | BOAT TYPE 2012 SURVEY |                     |               |               |                       |
|--------------------|-----------------------|---------------------|---------------|---------------|-----------------------|-----------------------|---------------------|---------------|---------------|-----------------------|
|                    | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER |
| n=                 | 28                    | 11                  | 29            | 17            | 10                    | 22                    | 13                  | 33            | 31            | 8                     |
| Add-on             | 67.1%                 | 64.2%               | 52.1%         | 28.6%         | 56.2%                 | 53.9%                 | 87.6%               | 51.8%         | 33.2%         | 56.7%                 |
| Repair/replacement | 1.3%                  | 7.6%                | 1.5%          | 16.2%         | 17.8%                 | 31.3%                 | 6.1%                | 37.1%         | 42.5%         | 17.8%                 |
| Upgrade            | 31.6%                 | 28.2%               | 46.5%         | 55.3%         | 26.0%                 | 14.8%                 | 6.3%                | 11.1%         | 24.3%         | 25.5%                 |
| <b>TOTAL</b>       | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         |

|                    | AMOUNT SPENT 2011 SURVEY |               |               | AMOUNT SPENT 2012 SURVEY |               |               |
|--------------------|--------------------------|---------------|---------------|--------------------------|---------------|---------------|
|                    | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      |
| n=                 | 36                       | 19            | 49            | 12                       | 26            | 70            |
| Add-on             | 50.8%                    | 74.2%         | 55.3%         | 58.4%                    | 55.5%         | 48.7%         |
| Repair/replacement | 12.7%                    | 1.6%          | 3.3%          | 30.7%                    | 42.9%         | 28.7%         |
| Upgrade            | 36.5%                    | 24.2%         | 41.4%         | 10.9%                    | 1.6%          | 22.6%         |
| <b>TOTAL</b>       | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> |

## 18.2u Heating and cooling accessory products purchased by type

More than 6 of 10 heating and cooling accessory products purchased by boat owners in 2012 were add-ons to existing boat equipment; 2 of 10 were for Repair/replacement of existing equipment.

**TABLE 18.2u**

|                    | OWNERSHIP 2011 SURVEY |               |                     |                     | OWNERSHIP 2012 SURVEY |               |                     |                     |
|--------------------|-----------------------|---------------|---------------------|---------------------|-----------------------|---------------|---------------------|---------------------|
|                    | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER |
| n=                 | 51                    | 7             | 7                   | 38                  | 50                    | 5             | 4                   | 41                  |
| Add-on             | 57.5%                 | 47.1%         | 37.0%               | 62.8%               | 61.8%                 | 53.8%         | 40.6%               | 65.0%               |
| Repair/replacement | 9.9%                  | 22.0%         | 42.0%               | 2.2%                | 22.2%                 | 15.2%         | 37.6%               | 21.5%               |
| Upgrade            | 32.6%                 | 30.8%         | 21.0%               | 35.0%               | 16.0%                 | 31.0%         | 21.8%               | 13.5%               |
| <b>TOTAL</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       |

|                    | BOAT TYPE 2011 SURVEY |                     |               |               |                       | BOAT TYPE 2012 SURVEY |                     |               |               |                       |
|--------------------|-----------------------|---------------------|---------------|---------------|-----------------------|-----------------------|---------------------|---------------|---------------|-----------------------|
|                    | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER |
| n=                 | 8                     | 15                  | 19            | 6             | 3                     | 12                    | 13                  | 10            | 13            | 3                     |
| Add-on             | 94.3%                 | 48.0%               | 62.6%         | 17.3%         | 59.7%                 | 64.7%                 | 84.3%               | 65.4%         | 40.9%         | 31.0%                 |
| Repair/replacement | 2.9%                  | 14.0%               | 6.7%          | 6.2%          | 33.1%                 | 29.3%                 | 8.2%                | 3.2%          | 39.6%         | 43.1%                 |
| Upgrade            | 2.9%                  | 38.0%               | 30.7%         | 76.5%         | 7.2%                  | 6.0%                  | 7.5%                | 31.4%         | 19.5%         | 25.9%                 |
| <b>TOTAL</b>       | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         |

|                    | AMOUNT SPENT 2011 SURVEY |               |               | AMOUNT SPENT 2012 SURVEY |               |               |
|--------------------|--------------------------|---------------|---------------|--------------------------|---------------|---------------|
|                    | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      |
| n=                 | 7                        | 11            | 42            | 4                        | 8             | 39            |
| Add-on             | 20.5%                    | 85.5%         | 61.3%         | 90.1%                    | 92.2%         | 52.6%         |
| Repair/replacement | 7.7%                     | 13.9%         | 10.8%         | 3.6%                     | 7.8%          | 27.1%         |
| Upgrade            | 71.7%                    | 0.6%          | 27.9%         | 6.3%                     | —             | 20.3%         |
| <b>TOTAL</b>       | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> |

## 18.3 Product Category by Trade Channel

SOURCE: FORESIGHT RESEARCH INC.

### 18.3a Boat accessory category by retail outlet

Table 18.3 a and b offers data on where boat owners shopped for boat accessories in 2012.

Table 18.3a details from which retail outlets boat owners purchased accessories during 2012 by accessory category. For example, 16% of boat owners who purchased accessories at a boat show bought safety products.

Table 18.3b indicates that 24% of boat owners who purchased electronic navigation products in 2012 did so at a marine specialty store.

**TABLE 18.3a**

|                                     | BOAT DEALER   | BOAT SHOW     | AFTERMARKET CATALOG | WEBSITE/ INTERNET | MARINA        | MARINE SPECIALTY STORE | MASS MERCHANT (WALMART) | OUTDOOR STORE (CABELLA) | OTHER/ DON'T KNOW |
|-------------------------------------|---------------|---------------|---------------------|-------------------|---------------|------------------------|-------------------------|-------------------------|-------------------|
| n=                                  | 1,567         | 179           | 472                 | 1,240             | 410           | 2,291                  | 1,472                   | 1,247                   | 580               |
| 1 Navigation (electronics)          | 7.0%          | 10.6%         | 7.8%                | 11.0%             | 1.7%          | 6.5%                   | 2.2%                    | 11.0%                   | 2.8%              |
| 2 Navigation (instruments)          | 1.5%          | 3.4%          | 3.4%                | 3.4%              | 1.0%          | 1.8%                   | 0.9%                    | 1.8%                    | 0.5%              |
| 3 Electrical/panels                 | 5.0%          | 3.9%          | 3.6%                | 5.2%              | 4.4%          | 5.0%                   | 5.4%                    | 4.2%                    | 9.0%              |
| 4 Gauges                            | 1.7%          | 4.5%          | 2.3%                | 1.7%              | 2.2%          | 2.5%                   | 0.3%                    | 0.6%                    | 0.5%              |
| 5 Entertainment (electronics)       | 2.0%          | 9.5%          | 5.5%                | 7.1%              | 1.5%          | 2.8%                   | 4.1%                    | 1.3%                    | 3.3%              |
| 6 Lighting                          | 3.8%          | 4.5%          | 6.1%                | 4.1%              | 2.9%          | 3.7%                   | 4.0%                    | 2.3%                    | 1.2%              |
| 7 Safety                            | 8.9%          | 16.2%         | 7.4%                | 9.6%              | 5.1%          | 11.2%                  | 18.4%                   | 12.8%                   | 4.5%              |
| 8 Trailering                        | 6.3%          | 2.8%          | 6.6%                | 4.7%              | 6.1%          | 3.7%                   | 6.3%                    | 4.9%                    | 10.9%             |
| 9 Watersports                       | 3.8%          | 6.7%          | 3.2%                | 7.1%              | 4.1%          | 4.5%                   | 8.2%                    | 11.4%                   | 4.5%              |
| 10 Galley equipment                 | 1.1%          | 3.4%          | 0.8%                | 1.4%              | 0.2%          | 1.4%                   | 2.3%                    | 0.6%                    | 0.9%              |
| 11 Covers and tops                  | 10.4%         | 6.1%          | 7.0%                | 11.1%             | 4.6%          | 5.5%                   | 5.4%                    | 4.9%                    | 12.6%             |
| 12 Heating/cooling                  | 0.8%          | 0.6%          | 1.5%                | 0.3%              | 0.2%          | 0.7%                   | 0.5%                    | 0.3%                    | 0.3%              |
| 13 Plumbing/water systems           | 1.9%          | 0.0%          | 3.4%                | 1.7%              | 3.2%          | 2.3%                   | 1.8%                    | 1.1%                    | 4.3%              |
| 14 Fishing hardware (bolt-on only)  | 3.5%          | 2.8%          | 6.6%                | 3.4%              | 4.1%          | 3.7%                   | 3.2%                    | 12.8%                   | 1.9%              |
| 15 Seating                          | 4.7%          | 5.0%          | 5.3%                | 4.5%              | 4.4%          | 3.3%                   | 3.4%                    | 6.8%                    | 6.6%              |
| 16 Bolt-on hardware                 | 2.8%          | 4.5%          | 3.2%                | 2.3%              | 1.2%          | 2.3%                   | 2.2%                    | 2.3%                    | 0.5%              |
| 17 Anchoring/mooring                | 8.9%          | 6.7%          | 11.9%               | 7.7%              | 6.6%          | 9.3%                   | 11.8%                   | 10.9%                   | 5.7%              |
| 18 Dock installation/dockside equip | 2.4%          | 5.0%          | 3.8%                | 2.3%              | 4.1%          | 4.4%                   | 1.5%                    | 1.0%                    | 6.4%              |
| 19 Boat maintenance and repair      | 10.5%         | 1.1%          | 6.1%                | 6.4%              | 17.3%         | 13.8%                  | 10.5%                   | 5.6%                    | 12.6%             |
| 20 Engine maintenance and repair    | 13.1%         | 2.8%          | 4.4%                | 5.1%              | 24.9%         | 11.6%                  | 7.5%                    | 3.4%                    | 11.2%             |
| <b>TOTAL</b>                        | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>     | <b>100.0%</b> | <b>100.0%</b>          | <b>100.0%</b>           | <b>100.0%</b>           | <b>100.0%</b>     |

**TABLE 18.3b**

|                         | NAVIGATION<br>(ELECTRONICS) | NAVIGATION<br>(INSTRUMENTS) | ELECTRICAL<br>PANELS | GAUGES        | ENTERTAINMENT<br>(ELECTRONICS) | LIGHTING      | SAFETY        | TRAILERING    | WATERSPORTS   | GALLEY<br>EQUIPMENT |
|-------------------------|-----------------------------|-----------------------------|----------------------|---------------|--------------------------------|---------------|---------------|---------------|---------------|---------------------|
| n=                      | 621                         | 162                         | 470                  | 139           | 306                            | 329           | 963           | 498           | 523           | 108                 |
| Boat dealer             | 17.5%                       | 14.3%                       | 16.6%                | 18.9%         | 10.6%                          | 18.3%         | 14.4%         | 19.6%         | 11.4%         | 15.6%               |
| Boat show               | 3.1%                        | 3.8%                        | 1.5%                 | 5.8%          | 5.5%                           | 2.5%          | 3.0%          | 0.9%          | 2.2%          | 5.6%                |
| Aftermarket catalog     | 6.0%                        | 9.8%                        | 3.6%                 | 7.6%          | 8.6%                           | 8.8%          | 3.7%          | 6.3%          | 2.8%          | 3.5%                |
| Website/Internet        | 22.0%                       | 26.1%                       | 13.7%                | 15.3%         | 28.6%                          | 15.5%         | 12.4%         | 11.6%         | 16.9%         | 15.4%               |
| Marina                  | 1.1%                        | 2.6%                        | 3.9%                 | 6.4%          | 1.9%                           | 3.6%          | 2.2%          | 5.0%          | 3.3%          | 1.1%                |
| Marine specialty store  | 24.1%                       | 25.7%                       | 24.3%                | 41.3%         | 21.1%                          | 25.7%         | 26.7%         | 17.1%         | 19.6%         | 30.8%               |
| Mass merchant (Walmart) | 5.1%                        | 8.0%                        | 17.0%                | 3.1%          | 20.0%                          | 18.1%         | 28.1%         | 18.6%         | 23.1%         | 31.9%               |
| Outdoor store (Cabella) | 22.1%                       | 13.6%                       | 11.0%                | 5.5%          | 5.4%                           | 8.8%          | 16.7%         | 12.3%         | 27.2%         | 6.7%                |
| Other/don't know        | 2.5%                        | 1.6%                        | 11.0%                | 2.2%          | 6.3%                           | 2.0%          | 2.7%          | 12.7%         | 5.1%          | 4.2%                |
| <b>TOTAL</b>            | <b>103.5%</b>               | <b>105.5%</b>               | <b>102.6%</b>        | <b>106.1%</b> | <b>108.0%</b>                  | <b>103.3%</b> | <b>109.9%</b> | <b>104.1%</b> | <b>111.6%</b> | <b>114.8%</b>       |

|                         | COVERS<br>& TOPS | HEATING/<br>COOLING | PLUMBING/<br>WATER SYSTEM | FISHING<br>HARDWARE | SEATING       | BOLT-ON<br>HARDWARE | ANCHORING/<br>MOORING | DOCK<br>INSTALLATION | BOAT<br>MAINTENANCE<br>& REPAIR | ENGINE<br>MAINTENANCE<br>& REPAIR |
|-------------------------|------------------|---------------------|---------------------------|---------------------|---------------|---------------------|-----------------------|----------------------|---------------------------------|-----------------------------------|
| n=                      | 677              | 50                  | 191                       | 421                 | 425           | 203                 | 850                   | 268                  | 868                             | 810                               |
| Boat dealer             | 24.1%            | 26.5%               | 15.1%                     | 12.9%               | 17.5%         | 21.5%               | 16.4%                 | 14.2%                | 19.0%                           | 25.5%                             |
| Boat show               | 1.6%             | 1.6%                | 0.2%                      | 1.2%                | 2.2%          | 3.7%                | 1.4%                  | 3.2%                 | 0.3%                            | 0.6%                              |
| Aftermarket catalog     | 4.9%             | 14.2%               | 8.5%                      | 7.4%                | 5.9%          | 7.4%                | 6.6%                  | 6.9%                 | 3.4%                            | 2.5%                              |
| Website/Internet        | 20.3%            | 8.8%                | 11.1%                     | 9.9%                | 13.2%         | 13.7%               | 11.2%                 | 10.3%                | 9.1%                            | 7.8%                              |
| Marina                  | 2.8%             | 1.8%                | 6.8%                      | 4.0%                | 4.3%          | 2.3%                | 3.2%                  | 6.5%                 | 8.2%                            | 12.5%                             |
| Marine specialty store  | 18.5%            | 30.4%               | 28.0%                     | 19.8%               | 17.8%         | 26.0%               | 24.9%                 | 37.8%                | 36.5%                           | 32.9%                             |
| Mass merchant (Walmart) | 11.9%            | 13.4%               | 14.4%                     | 11.1%               | 11.8%         | 16.0%               | 20.4%                 | 8.1%                 | 17.8%                           | 13.7%                             |
| Outdoor store (Cabella) | 9.0%             | 7.0%                | 7.2%                      | 37.6%               | 20.0%         | 14.5%               | 16.0%                 | 4.9%                 | 8.1%                            | 5.2%                              |
| Other/don't know        | 10.8%            | 4.5%                | 13.0%                     | 2.5%                | 8.9%          | 1.7%                | 3.8%                  | 13.9%                | 8.4%                            | 8.1%                              |
| <b>TOTAL</b>            | <b>103.9%</b>    | <b>108.2%</b>       | <b>104.3%</b>             | <b>106.4%</b>       | <b>101.6%</b> | <b>106.8%</b>       | <b>103.9%</b>         | <b>105.8%</b>        | <b>110.8%</b>                   | <b>108.8%</b>                     |

**TABLE 18.3c**

|                      | NAVIGATION<br>(ELECTRONICS) | NAVIGATION<br>(INSTRUMENTS) | ELECTRICAL<br>PANELS      | GAUGES              | ENTERTAINMENT<br>(ELECTRONICS) | LIGHTING            | SAFETY                | TRAILERING           | WATERSPORTS                     | GALLEY<br>EQUIPMENT               |
|----------------------|-----------------------------|-----------------------------|---------------------------|---------------------|--------------------------------|---------------------|-----------------------|----------------------|---------------------------------|-----------------------------------|
| Average Amount Spent | \$452.85                    | \$562.66                    | \$205.84                  | \$191.35            | \$488.26                       | \$156.70            | \$163.77              | \$372.34             | \$316.49                        | \$237.74                          |
|                      | COVERS<br>& TOPS            | HEATING/<br>COOLING         | PLUMBING/<br>WATER SYSTEM | FISHING<br>HARDWARE | SEATING                        | BOLT-ON<br>HARDWARE | ANCHORING/<br>MOORING | DOCK<br>INSTALLATION | BOAT<br>MAINTENANCE<br>& REPAIR | ENGINE<br>MAINTENANCE<br>& REPAIR |
| Average Amount Spent | \$427.90                    | \$554.39                    | \$214.70                  | \$271.81            | \$302.64                       | \$193.87            | \$157.87              | \$997.77             | \$251.13                        | \$306.63                          |

## 18.4 Spending Estimates

SOURCE: FORESIGHT RESEARCH INC.

**Respondents were asked to estimate the total spent on accessories during 2012, excluding installation costs.**

Note: 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).

### 18.4a Boating accessories expenditures (excluding labor and installation)

Boat owners spent \$1,165, on average, for boating accessories during 2012.

There were marked differences in accessory spending among ownership types; existing boat owners and those who had purchased a pre-owned boat within the last 18 months spent \$1,121 and \$1,220, respectively, compared to \$2,572 for those who had purchased a new boat within the last 18 months.

Significant spending differences also existed among owners of different types of boats; on the low end aluminum boat owners spent an average of \$759, while at the high end, sailboat owners spent an average of \$2,310 during 2012.

**TABLE 18.4a**

|                         | OWNERSHIP 2011 SURVEY |                |                     |                     | TOTAL          | OWNERSHIP 2012 SURVEY |                     |                     | TOTAL |
|-------------------------|-----------------------|----------------|---------------------|---------------------|----------------|-----------------------|---------------------|---------------------|-------|
|                         | TOTAL                 | PURCHASED NEW  | PURCHASED PRE-OWNED | EXISTING BOAT OWNER |                | PURCHASED NEW         | PURCHASED PRE-OWNED | EXISTING BOAT OWNER |       |
| n=                      | 2,247                 | 55             | 205                 | 1,987               | 2,368          | 57                    | 204                 | 2,107               |       |
| \$100 and less          | 21.3%                 | 5.2%           | 12.4%               | 22.7%               | 16.4%          | 5.7%                  | 11.3%               | 17.1%               |       |
| \$101 to \$249          | 17.2%                 | 6.5%           | 13.0%               | 17.9%               | 15.8%          | 9.0%                  | 14.6%               | 16.1%               |       |
| \$250 to \$500          | 26.8%                 | 18.7%          | 30.3%               | 26.7%               | 17.7%          | 16.5%                 | 19.8%               | 17.5%               |       |
| \$501 to \$1,000        | 15.8%                 | 16.9%          | 20.0%               | 15.3%               | 20.2%          | 20.2%                 | 24.9%               | 19.8%               |       |
| More than \$1,000       | 18.9%                 | 52.7%          | 24.4%               | 17.4%               | 29.9%          | 48.6%                 | 29.4%               | 29.5%               |       |
| <b>TOTAL</b>            | <b>100.0%</b>         | <b>100.0%</b>  | <b>100.0%</b>       | <b>100.0%</b>       | <b>100.0%</b>  | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b>       |       |
| <b>AVERAGE SPENDING</b> | <b>\$821</b>          | <b>\$2,077</b> | <b>\$1,037</b>      | <b>\$764</b>        | <b>\$1,165</b> | <b>\$2,572</b>        | <b>\$1,220</b>      | <b>\$1,121</b>      |       |

|                         | BOAT TYPE 2011 SURVEY |                     |                |                |                       | BOAT TYPE 2012 SURVEY |                     |                |                |                       |
|-------------------------|-----------------------|---------------------|----------------|----------------|-----------------------|-----------------------|---------------------|----------------|----------------|-----------------------|
|                         | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE     | INBOARD        | SAILBOAT 19' & LARGER | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE     | INBOARD        | SAILBOAT 19' & LARGER |
| n=                      | 888                   | 657                 | 383            | 286            | 33                    | 925                   | 715                 | 376            | 318            | 33                    |
| \$100 and less          | 28.3%                 | 18.0%               | 16.0%          | 16.0%          | 6.4%                  | 24.5%                 | 12.7%               | 12.5%          | 6.8%           | 4.3%                  |
| \$101 to \$249          | 19.2%                 | 15.5%               | 19.2%          | 12.9%          | 11.4%                 | 18.6%                 | 14.6%               | 12.1%          | 15.3%          | 11.3%                 |
| \$250 to \$500          | 26.0%                 | 29.2%               | 25.3%          | 25.2%          | 33.4%                 | 19.0%                 | 17.7%               | 14.1%          | 17.1%          | 26.6%                 |
| \$501 to \$1,000        | 13.0%                 | 20.6%               | 12.5%          | 17.3%          | 17.6%                 | 18.3%                 | 21.3%               | 21.9%          | 22.2%          | 11.8%                 |
| More than \$1,000       | 13.5%                 | 16.6%               | 27.1%          | 28.6%          | 31.2%                 | 19.6%                 | 33.7%               | 39.4%          | 38.6%          | 46.0%                 |
| <b>TOTAL</b>            | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b>  | <b>100.0%</b>  | <b>100.0%</b>         | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b>  | <b>100.0%</b>  | <b>100.0%</b>         |
| <b>AVERAGE SPENDING</b> | <b>\$627</b>          | <b>\$810</b>        | <b>\$1,035</b> | <b>\$1,113</b> | <b>\$1,265</b>        | <b>\$759</b>          | <b>\$1,275</b>      | <b>\$1,432</b> | <b>\$1,662</b> | <b>\$2,310</b>        |

|                         | AMOUNT SPENT 2011 SURVEY |               |                | AMOUNT SPENT 2012 SURVEY |               |                |
|-------------------------|--------------------------|---------------|----------------|--------------------------|---------------|----------------|
|                         | \$500 OR LESS            | \$501-\$1,000 | \$1,000+       | \$500 OR LESS            | \$501-\$1,000 | \$1,000+       |
| n=                      | 1,468                    | 355           | 424            | 1,181                    | 479           | 708            |
| \$100 and less          | 32.7%                    | 0.0%          | 0.0%           | 32.8%                    | 0.0%          | 0.0%           |
| \$101 to \$249          | 26.3%                    | 0.0%          | 0.0%           | 31.7%                    | 0.0%          | 0.0%           |
| \$250 to \$500          | 41.0%                    | 0.0%          | 0.0%           | 35.5%                    | 0.0%          | 0.0%           |
| \$501 to \$1,000        | 0.0%                     | 100.0%        | 0.0%           | 0.0%                     | 100.0%        | 0.0%           |
| More than \$1,000       | 0.0%                     | 0.0%          | 100.0%         | 0.0%                     | 0.0%          | 100.0%         |
| <b>TOTAL</b>            | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b>  | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b>  |
| <b>AVERAGE SPENDING</b> | <b>\$230</b>             | <b>\$813</b>  | <b>\$2,442</b> | <b>\$201</b>             | <b>\$734</b>  | <b>\$3,064</b> |



### 18.4b Estimated total spending on accessories in billions of dollars

On average, boat owners (power and sailboat combined) spent \$882 on Repair/replacement and upgrade products in 2012, compared to \$592 the previous year.

Extrapolating these figures to the 10.4 million power and sail boats in the U.S. for which Repair/replacement/upgrade purchases were made, aftermarket accessory sales in 2012 totaled an estimated \$5.6 billion, compared to \$4.0 billion in 2011.

**TABLE 18.4b**

|   | 2011         | 2012         | % CHANGE |
|---|--------------|--------------|----------|
| Average spent on replacement/upgrades                         | \$592        | \$882        | 49.0%    |
| Estimated boats on which replacement/upgrades were applied to | 10.4 million | 10.4 million |          |
| Estimated Total Accessory Spending in billions of Dollars     | \$3.98       | \$5.59       | 40.3%    |

## 18.4c Add-on accessory expenditures

More than 8 of 10 boat owners bought add-on accessories in 2012; 22% spent their entire accessory budget on add-on accessories.

**TABLE 18.4c**

|              | OWNERSHIP 2011 SURVEY |               |                     |                     | OWNERSHIP 2012 SURVEY |               |                     |                     |
|--------------|-----------------------|---------------|---------------------|---------------------|-----------------------|---------------|---------------------|---------------------|
|              | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER |
| n=           | 1,895                 | 54            | 193                 | 1,647               | 2,082                 | 55            | 185                 | 1,841               |
| None         | 11.8%                 | 2.0%          | 8.2%                | 12.5%               | 15.0%                 | 3.4%          | 7.9%                | 16.1%               |
| 10% or less  | 10.0%                 | 3.9%          | 11.1%               | 10.0%               | 9.0%                  | 3.3%          | 9.6%                | 9.1%                |
| 11% to 20%   | 11.2%                 | 7.2%          | 13.3%               | 11.1%               | 7.6%                  | 7.6%          | 11.1%               | 7.3%                |
| 21% to 30%   | 18.2%                 | 17.4%         | 16.5%               | 18.4%               | 11.2%                 | 9.2%          | 14.9%               | 10.8%               |
| 31% to 40%   | 6.0%                  | 11.3%         | 9.0%                | 5.5%                | 7.7%                  | 8.9%          | 10.4%               | 7.4%                |
| 41% to 50%   | 12.6%                 | 14.3%         | 12.8%               | 12.6%               | 11.8%                 | 10.8%         | 12.2%               | 11.8%               |
| 51% to 75%   | 10.7%                 | 13.3%         | 12.3%               | 10.4%               | 10.6%                 | 11.5%         | 12.7%               | 10.4%               |
| 76% to 99%   | 5.3%                  | 7.3%          | 4.2%                | 5.4%                | 5.5%                  | 9.2%          | 5.6%                | 5.3%                |
| 100%         | 14.2%                 | 23.2%         | 12.5%               | 14.2%               | 21.6%                 | 36.1%         | 15.6%               | 21.8%               |
| <b>TOTAL</b> | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       |

|              | BOAT TYPE 2011 SURVEY |                     |               |               |                       | BOAT TYPE 2012 SURVEY |                     |               |               |                       |
|--------------|-----------------------|---------------------|---------------|---------------|-----------------------|-----------------------|---------------------|---------------|---------------|-----------------------|
|              | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER |
| n=           | 738                   | 564                 | 306           | 259           | 28                    | 819                   | 629                 | 325           | 282           | 26                    |
| None         | 11.2%                 | 10.1%               | 13.6%         | 15.0%         | 10.2%                 | 16.2%                 | 12.8%               | 17.1%         | 13.5%         | 21.9%                 |
| 10% or less  | 10.3%                 | 9.1%                | 11.1%         | 9.2%          | 11.7%                 | 6.9%                  | 8.2%                | 14.8%         | 10.4%         | 6.3%                  |
| 11% to 20%   | 8.5%                  | 12.7%               | 13.1%         | 11.6%         | 26.9%                 | 6.3%                  | 8.4%                | 8.2%          | 8.3%          | 13.9%                 |
| 21% to 30%   | 18.0%                 | 17.2%               | 17.4%         | 20.8%         | 25.9%                 | 9.8%                  | 11.5%               | 10.8%         | 14.9%         | 10.8%                 |
| 31% to 40%   | 4.4%                  | 8.1%                | 5.3%          | 7.0%          | 2.2%                  | 7.2%                  | 8.3%                | 6.9%          | 7.9%          | 14.5%                 |
| 41% to 50%   | 13.4%                 | 13.4%               | 14.2%         | 7.8%          | 4.9%                  | 13.7%                 | 12.0%               | 8.8%          | 9.7%          | 6.7%                  |
| 51% to 75%   | 11.1%                 | 9.7%                | 13.0%         | 9.5%          | 7.7%                  | 9.5%                  | 11.2%               | 9.6%          | 13.8%         | 10.4%                 |
| 76% to 99%   | 3.9%                  | 6.5%                | 6.9%          | 5.2%          | 3.3%                  | 5.9%                  | 5.5%                | 5.9%          | 4.0%          | 2.8%                  |
| 100%         | 19.2%                 | 13.2%               | 5.3%          | 13.9%         | 7.2%                  | 24.5%                 | 22.1%               | 17.9%         | 17.5%         | 12.7%                 |
| <b>TOTAL</b> | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         |

|              | AMOUNT SPENT 2011 SURVEY |               |               | AMOUNT SPENT 2012 SURVEY |               |               |
|--------------|--------------------------|---------------|---------------|--------------------------|---------------|---------------|
|              | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      |
| n=           | 1,193                    | 313           | 496           | 958                      | 434           | 683           |
| None         | 16.3%                    | 4.9%          | 3.9%          | 21.6%                    | 10.1%         | 9.1%          |
| 10% or less  | 7.7%                     | 15.2%         | 12.7%         | 5.6%                     | 9.8%          | 13.0%         |
| 11% to 20%   | 10.3%                    | 12.9%         | 12.0%         | 4.3%                     | 8.1%          | 12.1%         |
| 21% to 30%   | 17.0%                    | 15.0%         | 21.9%         | 9.6%                     | 11.6%         | 13.2%         |
| 31% to 40%   | 5.1%                     | 6.2%          | 8.2%          | 6.3%                     | 9.1%          | 8.8%          |
| 41% to 50%   | 12.4%                    | 17.5%         | 13.2%         | 10.4%                    | 15.6%         | 11.3%         |
| 51% to 75%   | 9.1%                     | 14.1%         | 14.0%         | 6.8%                     | 13.5%         | 13.7%         |
| 76% to 99%   | 4.6%                     | 4.2%          | 6.9%          | 2.8%                     | 8.3%          | 7.5%          |
| 100%         | 17.7%                    | 9.9%          | 7.1%          | 32.6%                    | 13.9%         | 11.3%         |
| <b>TOTAL</b> | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> |

### 18.4d Repair/replacement accessory expenditures

Nearly 15% of boat owners did not spend any money on Repair/replacement products during 2012; 22% spent their entire accessory budget on repair and replacement products.

**TABLE 18.4d**

|              | OWNERSHIP 2011 SURVEY |               |                     |                     | OWNERSHIP 2012 SURVEY |               |                     |                     |
|--------------|-----------------------|---------------|---------------------|---------------------|-----------------------|---------------|---------------------|---------------------|
|              | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER |
| n=           | 1,984                 | 43            | 184                 | 1,756               | 2,027                 | 39            | 180                 | 1,809               |
| None         | 7.5%                  | 25.2%         | 6.9%                | 7.1%                | 14.7%                 | 35.6%         | 9.1%                | 14.8%               |
| 10% or less  | 7.5%                  | 13.3%         | 9.2%                | 7.2%                | 8.1%                  | 12.5%         | 8.4%                | 7.9%                |
| 11% to 20%   | 9.9%                  | 14.1%         | 12.7%               | 9.5%                | 9.0%                  | 10.8%         | 10.5%               | 8.9%                |
| 21% to 30%   | 16.5%                 | 22.8%         | 18.9%               | 16.1%               | 12.8%                 | 19.6%         | 14.9%               | 12.5%               |
| 31% to 40%   | 6.7%                  | 12.4%         | 10.4%               | 6.2%                | 8.3%                  | 10.1%         | 12.4%               | 7.8%                |
| 41% to 50%   | 11.3%                 | 8.2%          | 11.9%               | 11.4%               | 10.0%                 | 6.4%          | 11.7%               | 9.9%                |
| 51% to 75%   | 10.8%                 | 2.7%          | 12.9%               | 10.7%               | 8.1%                  | 3.2%          | 13.8%               | 7.6%                |
| 76% to 99%   | 6.7%                  | 0.4%          | 8.5%                | 6.7%                | 6.9%                  | 0.5%          | 7.5%                | 7.0%                |
| 100.0%       | 23.1%                 | 1.1%          | 8.8%                | 25.2%               | 22.1%                 | 1.3%          | 11.7%               | 23.6%               |
| <b>TOTAL</b> | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       |

|              | BOAT TYPE 2011 SURVEY |                     |               |               |                       | BOAT TYPE 2012 SURVEY |                     |               |               |                       |
|--------------|-----------------------|---------------------|---------------|---------------|-----------------------|-----------------------|---------------------|---------------|---------------|-----------------------|
|              | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER |
| n=           | 762                   | 578                 | 347           | 266           | 31                    | 781                   | 599                 | 337           | 280           | 30                    |
| None         | 9.4%                  | 7.3%                | 2.8%          | 9.1%          | 1.2%                  | 17.2%                 | 13.7%               | 14.1%         | 11.7%         | 5.1%                  |
| 10% or less  | 8.0%                  | 7.3%                | 5.5%          | 9.2%          | 6.5%                  | 6.3%                  | 10.0%               | 9.4%          | 7.0%          | 8.9%                  |
| 11% to 20%   | 9.2%                  | 10.0%               | 12.4%         | 8.7%          | 4.7%                  | 9.8%                  | 9.6%                | 6.3%          | 9.3%          | 7.8%                  |
| 21% to 30%   | 19.9%                 | 14.1%               | 16.0%         | 12.5%         | 15.0%                 | 10.9%                 | 16.7%               | 12.3%         | 11.8%         | 3.6%                  |
| 31% to 40%   | 5.0%                  | 11.5%               | 4.3%          | 4.7%          | 4.3%                  | 9.4%                  | 8.2%                | 7.0%          | 6.6%          | 11.6%                 |
| 41% to 50%   | 10.5%                 | 10.6%               | 10.1%         | 15.4%         | 23.6%                 | 12.4%                 | 7.8%                | 7.4%          | 11.1%         | 13.0%                 |
| 51% to 75%   | 7.0%                  | 13.2%               | 11.8%         | 13.2%         | 26.0%                 | 7.2%                  | 6.5%                | 4.9%          | 16.6%         | 18.0%                 |
| 76% to 99%   | 6.4%                  | 5.7%                | 8.9%          | 6.9%          | 9.5%                  | 4.4%                  | 6.1%                | 14.9%         | 6.9%          | 2.7%                  |
| 100.0%       | 24.5%                 | 20.3%               | 28.2%         | 20.4%         | 9.3%                  | 22.4%                 | 21.4%               | 23.7%         | 19.0%         | 29.3%                 |
| <b>TOTAL</b> | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         |

|              | AMOUNT SPENT 2011 SURVEY |               |               | AMOUNT SPENT 2012 SURVEY |               |               |
|--------------|--------------------------|---------------|---------------|--------------------------|---------------|---------------|
|              | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      |
| n=           | 1,295                    | 320           | 480           | 976                      | 422           | 624           |
| None         | 7.5%                     | 6.0%          | 8.1%          | 18.7%                    | 11.0%         | 11.2%         |
| 10% or less  | 5.6%                     | 11.4%         | 10.6%         | 3.6%                     | 8.4%          | 15.1%         |
| 11% to 20%   | 7.0%                     | 12.3%         | 16.6%         | 5.5%                     | 14.5%         | 11.0%         |
| 21% to 30%   | 15.0%                    | 16.5%         | 21.5%         | 10.8%                    | 14.7%         | 14.9%         |
| 31% to 40%   | 6.1%                     | 9.1%          | 7.8%          | 5.4%                     | 11.7%         | 10.5%         |
| 41% to 50%   | 11.8%                    | 11.6%         | 10.7%         | 8.9%                     | 11.7%         | 10.1%         |
| 51% to 75%   | 9.3%                     | 14.2%         | 11.9%         | 7.7%                     | 6.7%          | 9.7%          |
| 76% to 99%   | 6.6%                     | 9.5%          | 5.1%          | 3.9%                     | 8.7%          | 10.0%         |
| 100.0%       | 31.0%                    | 9.5%          | 7.6%          | 35.5%                    | 12.6%         | 7.5%          |
| <b>TOTAL</b> | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> |

## 18.4e Upgrade accessory expenditures

One-third of boat owners did not spend any money on boat upgrade accessories; 5% spent their entire accessory budget on upgrade products.

**TABLE 18.4e**

|              | OWNERSHIP 2011 SURVEY |               |                     |                     | OWNERSHIP 2012 SURVEY |               |                     |                     |
|--------------|-----------------------|---------------|---------------------|---------------------|-----------------------|---------------|---------------------|---------------------|
|              | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER | TOTAL                 | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER |
| n=           | 1,663                 | 47            | 173                 | 1,444               | 1,738                 | 44            | 159                 | 1,536               |
| None         | 24.7%                 | 15.2%         | 18.5%               | 25.7%               | 33.5%                 | 22.4%         | 23.9%               | 34.7%               |
| 10% or less  | 14.9%                 | 8.6%          | 15.7%               | 15.0%               | 11.8%                 | 8.5%          | 15.3%               | 11.6%               |
| 11% to 20%   | 12.9%                 | 10.2%         | 16.2%               | 12.6%               | 9.8%                  | 10.5%         | 15.2%               | 9.2%                |
| 21% to 30%   | 18.8%                 | 19.5%         | 20.5%               | 18.6%               | 15.3%                 | 17.4%         | 15.8%               | 15.2%               |
| 31% to 40%   | 6.4%                  | 15.7%         | 8.7%                | 5.8%                | 8.6%                  | 12.0%         | 10.4%               | 8.3%                |
| 41% to 50%   | 9.2%                  | 14.3%         | 9.1%                | 9.1%                | 7.9%                  | 10.6%         | 6.7%                | 7.9%                |
| 51% to 75%   | 6.6%                  | 10.1%         | 5.7%                | 6.6%                | 5.2%                  | 6.9%          | 8.2%                | 4.8%                |
| 76% to 99%   | 3.0%                  | 3.4%          | 3.2%                | 3.0%                | 2.9%                  | 4.6%          | 1.6%                | 3.0%                |
| 100.0%       | 3.5%                  | 3.0%          | 2.4%                | 3.6%                | 5.0%                  | 7.1%          | 2.9%                | 5.3%                |
| <b>TOTAL</b> | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       | <b>100.0%</b>         | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       |

|              | BOAT TYPE 2011 SURVEY |                     |               |               |                       | BOAT TYPE 2012 SURVEY |                     |               |               |                       |
|--------------|-----------------------|---------------------|---------------|---------------|-----------------------|-----------------------|---------------------|---------------|---------------|-----------------------|
|              | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER | ALUMINUM OUTBOARD     | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER |
| n=           | 634                   | 503                 | 266           | 233           | 27                    | 665                   | 531                 | 279           | 237           | 26                    |
| None         | 24.7%                 | 22.4%               | 24.3%         | 32.2%         | 5.1%                  | 36.9%                 | 31.7%               | 32.8%         | 28.8%         | 32.0%                 |
| 10% or less  | 13.7%                 | 15.6%               | 14.0%         | 16.5%         | 24.2%                 | 11.4%                 | 10.7%               | 15.9%         | 10.9%         | 11.5%                 |
| 11% to 20%   | 8.1%                  | 18.2%               | 18.1%         | 9.2%          | 11.3%                 | 7.6%                  | 8.9%                | 7.0%          | 20.7%         | 13.1%                 |
| 21% to 30%   | 20.9%                 | 16.4%               | 17.2%         | 18.3%         | 33.4%                 | 16.7%                 | 13.9%               | 12.8%         | 17.4%         | 17.8%                 |
| 31% to 40%   | 6.6%                  | 6.4%                | 4.1%          | 8.1%          | 8.4%                  | 6.4%                  | 11.7%               | 8.9%          | 7.7%          | 7.4%                  |
| 41% to 50%   | 12.3%                 | 7.8%                | 7.6%          | 5.9%          | 7.8%                  | 8.7%                  | 8.3%                | 8.9%          | 3.6%          | 6.2%                  |
| 51% to 75%   | 7.7%                  | 7.0%                | 3.9%          | 5.7%          | 9.0%                  | 1.9%                  | 8.5%                | 7.1%          | 4.7%          | 4.3%                  |
| 76% to 99%   | 3.1%                  | 2.3%                | 4.9%          | 2.5%          | 0.6%                  | 3.7%                  | 2.6%                | 2.4%          | 2.1%          | 2.7%                  |
| 100.0%       | 2.8%                  | 3.9%                | 6.0%          | 1.6%          | 0.2%                  | 6.7%                  | 3.7%                | 4.2%          | 4.1%          | 5.0%                  |
| <b>TOTAL</b> | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         | <b>100.0%</b>         | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         |

|              | AMOUNT SPENT 2011 SURVEY |               |               | AMOUNT SPENT 2012 SURVEY |               |               |
|--------------|--------------------------|---------------|---------------|--------------------------|---------------|---------------|
|              | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      |
| n=           | 1,004                    | 297           | 476           | 757                      | 378           | 597           |
| None         | 33.9%                    | 16.5%         | 7.0%          | 52.6%                    | 21.0%         | 16.3%         |
| 10% or less  | 13.1%                    | 18.8%         | 16.8%         | 4.7%                     | 13.2%         | 20.1%         |
| 11% to 20%   | 9.7%                     | 17.6%         | 17.2%         | 5.7%                     | 15.6%         | 11.4%         |
| 21% to 30%   | 20.0%                    | 15.4%         | 19.7%         | 12.5%                    | 16.9%         | 18.1%         |
| 31% to 40%   | 4.7%                     | 8.0%          | 9.4%          | 6.5%                     | 11.3%         | 9.7%          |
| 41% to 50%   | 9.1%                     | 10.6%         | 7.6%          | 5.3%                     | 12.2%         | 8.4%          |
| 51% to 75%   | 4.8%                     | 4.4%          | 12.0%         | 2.7%                     | 4.3%          | 8.9%          |
| 76% to 99%   | 1.7%                     | 3.6%          | 4.9%          | 3.2%                     | 1.4%          | 3.5%          |
| 100.0%       | 2.9%                     | 5.2%          | 5.3%          | 6.8%                     | 4.1%          | 3.6%          |
| <b>TOTAL</b> | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> |

## 18.4f Accessory budget

**Respondents were asked how accessory expenditures in 2012 compared to 2011.**

One-third of boat owners spent more on accessories in 2012 than they did in 2011, while 37% spent less than they did the previous year.

**TABLE 18.4f**

|                | OWNERSHIP 2011 SURVEY |                  |                        |                        | OWNERSHIP 2012 SURVEY |                  |                        |                        |
|----------------|-----------------------|------------------|------------------------|------------------------|-----------------------|------------------|------------------------|------------------------|
|                | TOTAL                 | PURCHASED<br>NEW | PURCHASED<br>PRE-OWNED | EXISTING<br>BOAT OWNER | TOTAL                 | PURCHASED<br>NEW | PURCHASED<br>PRE-OWNED | EXISTING<br>BOAT OWNER |
| n=             | 3,000                 | 60               | 240                    | 2,700                  | 2,374                 | 57               | 204                    | 2,113                  |
| More than      | 32.6%                 | 55.7%            | 54.1%                  | 30.2%                  | 33.6%                 | 53.3%            | 52.3%                  | 31.2%                  |
| Less than      | 31.5%                 | 18.8%            | 19.7%                  | 32.8%                  | 37.0%                 | 24.6%            | 25.7%                  | 38.5%                  |
| About the same | 35.9%                 | 25.5%            | 26.3%                  | 37.0%                  | 29.4%                 | 22.1%            | 22.0%                  | 30.3%                  |
| <b>TOTAL</b>   | <b>100.0%</b>         | <b>100.0%</b>    | <b>100.0%</b>          | <b>100.0%</b>          | <b>100.0%</b>         | <b>100.0%</b>    | <b>100.0%</b>          | <b>100.0%</b>          |

|                | BOAT TYPE 2011 SURVEY |                        |               |               |                          | BOAT TYPE 2012 SURVEY |                        |               |               |                          |
|----------------|-----------------------|------------------------|---------------|---------------|--------------------------|-----------------------|------------------------|---------------|---------------|--------------------------|
|                | ALUMINUM<br>OUTBOARD  | FIBERGLASS<br>OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT<br>19' & LARGER | ALUMINUM<br>OUTBOARD  | FIBERGLASS<br>OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT<br>19' & LARGER |
| n=             | 1,260                 | 852                    | 477           | 375           | 36                       | 929                   | 715                    | 379           | 318           | 33                       |
| More than      | 32.2%                 | 33.1%                  | 35.6%         | 28.4%         | 40.8%                    | 31.7%                 | 37.8%                  | 32.4%         | 31.0%         | 33.7%                    |
| Less than      | 33.6%                 | 29.4%                  | 30.2%         | 31.2%         | 27.2%                    | 38.9%                 | 33.1%                  | 37.4%         | 40.2%         | 34.9%                    |
| About the same | 34.3%                 | 37.4%                  | 34.2%         | 40.5%         | 32.0%                    | 29.4%                 | 29.1%                  | 30.2%         | 28.8%         | 31.4%                    |
| <b>TOTAL</b>   | <b>100.0%</b>         | <b>100.0%</b>          | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>            | <b>100.0%</b>         | <b>100.0%</b>          | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>            |

|                | AMOUNT SPENT 2011 SURVEY |               |               | AMOUNT SPENT 2012 SURVEY |               |               |
|----------------|--------------------------|---------------|---------------|--------------------------|---------------|---------------|
|                | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      | \$500 OR LESS            | \$501-\$1,000 | \$1,000+      |
| n=             | 1,468                    | 355           | 551           | 1,181                    | 479           | 708           |
| More than      | 35.4%                    | 52.5%         | 60.2%         | 24.4%                    | 38.9%         | 45.6%         |
| Less than      | 30.2%                    | 23.5%         | 22.1%         | 40.2%                    | 36.9%         | 31.7%         |
| About the same | 34.4%                    | 24.0%         | 17.7%         | 35.4%                    | 24.2%         | 22.7%         |
| <b>TOTAL</b>   | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>            | <b>100.0%</b> | <b>100.0%</b> |

## 18.5 Study Demographics

SOURCE: FORESIGHT RESEARCH INC.

Demographic details of study respondents.

**TABLE 18.5**

|  | TOTAL         | OWNERSHIP     |                     |                     | BOAT TYPE         |                     |               |               |                       | PURCHASED ACCESSORIES IN 2012 |               |
|--|---------------|---------------|---------------------|---------------------|-------------------|---------------------|---------------|---------------|-----------------------|-------------------------------|---------------|
|  |               | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER | ALUMINUM OUTBOARD | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER | YES                           | NO            |
| <b>Age of respondent</b>   |               |               |                     |                     |                   |                     |               |               |                       |                               |               |
| 18–30 years old  | 5.5%          | 22.3%         | 15.6%               | 4.3%                | 3.6%              | 8.2%                | 3.0%          | 9.2%          | 6.4%                  | 6.8%                          | 1.0%          |
| 31–49 years old  | 21.7%         | 43.2%         | 37.4%               | 19.8%               | 16.7%             | 28.3%               | 18.6%         | 28.1%         | 17.0%                 | 23.7%                         | 14.6%         |
| 50–64 years old  | 37.6%         | 26.8%         | 35.0%               | 38.0%               | 40.0%             | 36.1%               | 35.4%         | 36.5%         | 26.2%                 | 37.0%                         | 39.5%         |
| 65 years and older   | 35.2%         | 7.7%          | 12.0%               | 37.9%               | 39.7%             | 27.4%               | 43.0%         | 26.2%         | 50.4%                 | 32.5%                         | 44.9%         |
| No Answer  | 0.0%          | 0.0%          | 0.0%                | 0.0%                | 0.0%              | 0.0%                | 0.0%          | 0.0%          | 0.0%                  | 0.0%                          | 0.0%          |
| <b>TOTAL</b>   | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       | <b>100.0%</b>     | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         | <b>100.0%</b>                 | <b>100.0%</b> |
| <b>AVERAGE AGE</b>   | <b>56</b>     | <b>43</b>     | <b>47</b>           | <b>57</b>           | <b>58</b>         | <b>54</b>           | <b>58</b>     | <b>53</b>     | <b>58</b>             | <b>55</b>                     | <b>61</b>     |
| <b>Sex of respondent</b>   |               |               |                     |                     |                   |                     |               |               |                       |                               |               |
| Male   | 62.3%         | 62.3%         | 48.8%               | 63.5%               | 61.8%             | 57.2%               | 77.6%         | 55.5%         | 65.5%                 | 62.6%                         | 61.3%         |
| Female   | 37.7%         | 37.7%         | 51.2%               | 36.5%               | 38.2%             | 42.8%               | 22.4%         | 44.5%         | 34.5%                 | 37.4%                         | 38.7%         |
| <b>TOTAL</b>   | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       | <b>100.0%</b>     | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         | <b>100.0%</b>                 | <b>100.0%</b> |
| <b>Are you married, have a partner or significant other?</b>   |               |               |                     |                     |                   |                     |               |               |                       |                               |               |
| Yes  | 90.1%         | 84.2%         | 89.2%               | 90.3%               | 90.5%             | 90.1%               | 91.5%         | 87.4%         | 85.6%                 | 90.0%                         | 90.5%         |
| No   | 9.9%          | 15.8%         | 10.8%               | 9.7%                | 9.5%              | 9.9%                | 8.5%          | 12.6%         | 14.4%                 | 10.0%                         | 9.5%          |
| <b>TOTAL</b>   | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       | <b>100.0%</b>     | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         | <b>100.0%</b>                 | <b>100.0%</b> |
| <b>Please indicate the highest level of education you have completed, or the highest degree you have received.</b> |               |               |                     |                     |                   |                     |               |               |                       |                               |               |
| Some high school   | 0.5%          | 1.3%          | 0.1%                | 0.6%                | 0.8%              | 0.3%                | 0.0%          | 0.5%          | 0.0%                  | 0.3%                          | 1.4%          |
| High school or GED   | 7.1%          | 4.2%          | 6.8%                | 7.2%                | 9.2%              | 8.1%                | 3.3%          | 3.2%          | 0.0%                  | 6.6%                          | 8.9%          |
| Some college   | 19.5%         | 17.7%         | 17.3%               | 19.7%               | 20.9%             | 17.4%               | 21.0%         | 18.1%         | 14.1%                 | 18.4%                         | 23.5%         |
| Technical or vocational school   | 5.9%          | 3.1%          | 5.4%                | 6.0%                | 5.5%              | 6.6%                | 4.4%          | 7.9%          | 0.2%                  | 5.4%                          | 7.6%          |
| Associate degree   | 7.7%          | 6.4%          | 10.8%               | 7.4%                | 7.6%              | 9.3%                | 4.3%          | 8.9%          | 5.9%                  | 8.2%                          | 6.0%          |
| Bachelor degree  | 32.0%         | 33.1%         | 37.1%               | 31.6%               | 30.3%             | 32.7%               | 33.7%         | 34.3%         | 33.7%                 | 33.4%                         | 26.8%         |
| Graduate degree  | 21.0%         | 26.5%         | 18.6%               | 21.1%               | 19.1%             | 21.3%               | 23.3%         | 22.9%         | 32.3%                 | 21.6%                         | 19.2%         |
| Doctorate degree   | 6.3%          | 7.7%          | 3.9%                | 6.4%                | 6.6%              | 4.3%                | 10.0%         | 4.2%          | 13.8%                 | 6.1%                          | 6.6%          |
| <b>TOTAL</b>   | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       | <b>100.0%</b>     | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         | <b>100.0%</b>                 | <b>100.0%</b> |
| <b>Please indicate your employment status. (Choose all that apply.)</b>  |               |               |                     |                     |                   |                     |               |               |                       |                               |               |
| Employed full-time   | 38.9%         | 64.7%         | 56.7%               | 36.7%               | 34.5%             | 46.2%               | 32.8%         | 45.0%         | 34.1%                 | 42.2%                         | 26.8%         |
| Employed part-time   | 6.8%          | 7.1%          | 8.2%                | 6.7%                | 7.3%              | 7.1%                | 6.5%          | 4.9%          | 7.7%                  | 6.7%                          | 7.3%          |
| Self-employed  | 9.7%          | 8.6%          | 8.8%                | 9.8%                | 8.8%              | 8.9%                | 13.4%         | 10.2%         | 8.5%                  | 10.1%                         | 8.4%          |
| Not employed, looking for work   | 1.1%          | 0.9%          | 1.0%                | 1.1%                | 1.1%              | 0.7%                | 0.7%          | 2.4%          | 0.2%                  | 1.1%                          | 0.8%          |
| Not employed, not looking for work   | 1.0%          | 0.6%          | 0.7%                | 1.1%                | 0.9%              | 1.2%                | 0.6%          | 1.7%          | 1.6%                  | 0.9%                          | 1.5%          |
| Retired  | 39.3%         | 14.7%         | 20.0%               | 41.6%               | 44.7%             | 30.6%               | 45.0%         | 33.3%         | 46.0%                 | 36.4%                         | 49.8%         |
| Student  | 2.0%          | 4.7%          | 2.9%                | 1.8%                | 1.6%              | 2.9%                | 1.0%          | 2.5%          | 2.0%                  | 2.4%                          | 0.6%          |
| Homemaker  | 3.4%          | 2.1%          | 4.5%                | 3.4%                | 3.5%              | 4.2%                | 2.0%          | 3.5%          | 0.3%                  | 3.0%                          | 5.2%          |
| Other  | 0.5%          | 0.4%          | 0.4%                | 0.5%                | 0.3%              | 0.9%                | 0.6%          | 0.0%          | 0.0%                  | 0.4%                          | 0.9%          |
| <b>TOTAL</b>   | <b>102.7%</b> | <b>103.8%</b> | <b>103.2%</b>       | <b>102.7%</b>       | <b>102.7%</b>     | <b>102.7%</b>       | <b>102.6%</b> | <b>103.5%</b> | <b>100.4%</b>         | <b>103.2%</b>                 | <b>101.3%</b> |
| <b>Please indicate your ethnic background or race.</b>   |               |               |                     |                     |                   |                     |               |               |                       |                               |               |
| Caucasian/white  | 90.9%         | 82.6%         | 95.2%               | 90.7%               | 92.4%             | 87.9%               | 91.1%         | 91.9%         | 95.0%                 | 90.0%                         | 93.9%         |
| African American/ black  | 2.3%          | 3.0%          | 0.9%                | 2.5%                | 2.7%              | 3.5%                | 1.3%          | 0.1%          | 0.2%                  | 2.6%                          | 1.6%          |
| Hispanic/Latin   | 2.7%          | 4.5%          | 1.8%                | 2.7%                | 2.2%              | 3.1%                | 3.8%          | 2.0%          | 2.2%                  | 2.9%                          | 1.8%          |
| Asian  | 2.6%          | 7.8%          | 1.2%                | 2.6%                | 2.0%              | 2.8%                | 2.0%          | 4.8%          | 2.0%                  | 2.9%                          | 1.6%          |
| Other  | 1.5%          | 2.1%          | 0.9%                | 1.5%                | 0.7%              | 2.7%                | 1.8%          | 1.2%          | 0.6%                  | 1.6%                          | 1.1%          |
| <b>TOTAL</b>   | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       | <b>100.0%</b>     | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         | <b>100.0%</b>                 | <b>100.0%</b> |

**TABLE 18.5 (continued)**

|  | AMOUNT SPENT IN 2011 |               |               |
|--|----------------------|---------------|---------------|
|  | \$500 OR LESS        | \$501-\$1,000 | \$1,000+      |
| <b>Age of respondent</b>   |                      |               |               |
| 18–30 years old  | 5.9%                 | 7.0%          | 8.1%          |
| 31–49 years old  | 17.8%                | 25.0%         | 32.5%         |
| 50–64 years old  | 38.5%                | 39.0%         | 32.8%         |
| 65 years and older   | 37.8%                | 29.0%         | 26.6%         |
| No Answer  | 0.0%                 | 0.0%          | 0.0%          |
| <b>TOTAL</b>   | <b>100.0%</b>        | <b>100.0%</b> | <b>100.0%</b> |
| <b>AVERAGE AGE</b>   | <b>57</b>            | <b>54</b>     | <b>52</b>     |
| <b>Sex of respondent</b>   |                      |               |               |
| Male   | 61.1%                | 66.9%         | 62.3%         |
| Female   | 38.9%                | 33.1%         | 37.7%         |
| <b>TOTAL</b>   | <b>100.0%</b>        | <b>100.0%</b> | <b>100.0%</b> |
| <b>Are you married, have a partner or significant other?</b>   |                      |               |               |
| Yes  | 89.2%                | 89.6%         | 91.8%         |
| No   | 10.8%                | 10.4%         | 8.2%          |
| <b>TOTAL</b>   | <b>100.0%</b>        | <b>100.0%</b> | <b>100.0%</b> |
| <b>Please indicate the highest level of education you have completed, or the highest degree you have received.</b> |                      |               |               |
| Some high school   | 0.0%                 | 0.1%          | 0.8%          |
| High school or GED   | 6.9%                 | 9.0%          | 4.4%          |
| Some college   | 20.2%                | 16.9%         | 16.4%         |
| Technical or vocational school   | 5.8%                 | 4.6%          | 5.3%          |
| Associate degree   | 8.6%                 | 8.2%          | 7.5%          |
| Bachelor degree  | 33.0%                | 32.2%         | 34.5%         |
| Graduate degree  | 20.1%                | 22.7%         | 23.7%         |
| Doctorate degree   | 5.4%                 | 6.3%          | 7.4%          |
| <b>TOTAL</b>   | <b>100.0%</b>        | <b>100.0%</b> | <b>100.0%</b> |
| <b>Please indicate your employment status. (Choose all that apply.)</b>  |                      |               |               |
| Employed full-time   | 36.5%                | 39.9%         | 53.1%         |
| Employed part-time   | 7.8%                 | 7.0%          | 4.7%          |
| Self-employed  | 8.4%                 | 12.5%         | 11.3%         |
| Not employed, looking for work   | 1.4%                 | 1.7%          | 0.4%          |
| Not employed, not looking for work   | 0.5%                 | 1.3%          | 1.4%          |
| Retired  | 43.6%                | 32.9%         | 27.2%         |
| Student  | 2.5%                 | 3.1%          | 1.7%          |
| Homemaker  | 2.5%                 | 3.9%          | 2.6%          |
| Other  | 0.5%                 | 0.6%          | 0.0%          |
| <b>TOTAL</b>   | <b>103.7%</b>        | <b>102.9%</b> | <b>102.4%</b> |
| <b>Please indicate your ethnic background or race.</b>   |                      |               |               |
| Caucasian/white  | 92.7%                | 90.4%         | 85.8%         |
| African American/ black  | 2.6%                 | 0.7%          | 3.7%          |
| Hispanic/Latin   | 1.4%                 | 2.5%          | 5.8%          |
| Asian  | 1.9%                 | 3.6%          | 4.1%          |
| Other  | 1.4%                 | 2.8%          | 0.6%          |
| <b>TOTAL</b>   | <b>100.0%</b>        | <b>100.0%</b> | <b>100.0%</b> |

**TABLE 18.5 (continued)**

|   | TOTAL         | OWNERSHIP     |                     |                     | BOAT TYPE         |                     |               |               |                       | PURCHASED ACCESSORIES IN 2012 |               |
|---|---------------|---------------|---------------------|---------------------|-------------------|---------------------|---------------|---------------|-----------------------|-------------------------------|---------------|
|   |               | PURCHASED NEW | PURCHASED PRE-OWNED | EXISTING BOAT OWNER | ALUMINUM OUTBOARD | FIBERGLASS OUTBOARD | STERNDRIVE    | INBOARD       | SAILBOAT 19' & LARGER | YES                           | NO            |
| <b>Please indicate the category that best describes your total annual household income in 2011.</b> |               |               |                     |                     |                   |                     |               |               |                       |                               |               |
| Under \$25,000  | 2.8%          | 1.9%          | 1.9%                | 2.9%                | 3.4%              | 2.4%                | 1.3%          | 3.5%          | 1.8%                  | 2.4%                          | 4.2%          |
| \$25,000–\$49,999   | 9.8%          | 7.3%          | 9.5%                | 10.0%               | 13.0%             | 6.8%                | 6.4%          | 10.8%         | 5.6%                  | 9.5%                          | 11.1%         |
| \$50,000–\$74,999   | 20.3%         | 14.2%         | 17.5%               | 20.7%               | 24.4%             | 19.7%               | 17.2%         | 11.7%         | 24.4%                 | 20.3%                         | 20.4%         |
| \$75,000–\$99,999   | 24.3%         | 19.2%         | 22.2%               | 24.5%               | 24.3%             | 27.5%               | 23.8%         | 17.3%         | 24.5%                 | 23.6%                         | 26.6%         |
| \$100,000–\$149,999   | 24.1%         | 28.2%         | 29.7%               | 23.4%               | 21.6%             | 24.1%               | 28.7%         | 25.5%         | 31.9%                 | 24.2%                         | 23.4%         |
| \$150,000–\$199,999   | 10.1%         | 14.8%         | 10.6%               | 10.0%               | 6.7%              | 11.6%               | 12.4%         | 16.0%         | 6.4%                  | 11.0%                         | 7.0%          |
| \$200,000–\$249,999   | 4.7%          | 5.7%          | 5.6%                | 4.6%                | 4.0%              | 4.8%                | 4.2%          | 7.8%          | 0.7%                  | 4.9%                          | 3.8%          |
| Over \$250,000  | 3.9%          | 8.7%          | 3.0%                | 3.9%                | 2.6%              | 3.1%                | 6.0%          | 7.4%          | 4.7%                  | 4.1%                          | 3.5%          |
| <b>TOTAL</b>  | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       | <b>100.0%</b>     | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         | <b>100.0%</b>                 | <b>100.0%</b> |
| <b>Number of boats owned</b>  |               |               |                     |                     |                   |                     |               |               |                       |                               |               |
| One   | 75.7%         | 68.4%         | 67.6%               | 76.6%               | 75.2%             | 76.2%               | 75.8%         | 76.9%         | 68.8%                 | 74.3%                         | 80.5%         |
| Two   | 16.6%         | 22.8%         | 21.9%               | 16.0%               | 17.3%             | 16.8%               | 15.8%         | 14.4%         | 19.5%                 | 17.8%                         | 12.5%         |
| Three to four   | 6.5%          | 6.4%          | 9.1%                | 6.2%                | 6.6%              | 6.1%                | 7.1%          | 5.6%          | 11.1%                 | 6.5%                          | 6.2%          |
| Five or more  | 1.2%          | 2.4%          | 1.4%                | 1.2%                | 0.9%              | 0.9%                | 1.3%          | 3.1%          | 0.6%                  | 1.4%                          | 0.8%          |
| Total   | 100.0%        | 100.0%        | 100.0%              | 100.0%              | 100.0%            | 100.0%              | 100.0%        | 100.0%        | 100.0%                | 100.0%                        | 100.0%        |
| <b>AVERAGE OF BOATS OWNED</b>   | <b>1.40</b>   | <b>1.55</b>   | <b>1.50</b>         | <b>1.39</b>         | <b>1.39</b>       | <b>1.36</b>         | <b>1.40</b>   | <b>1.50</b>   | <b>1.46</b>           | <b>1.42</b>                   | <b>1.32</b>   |
| <b>When purchased your last boat</b>  |               |               |                     |                     |                   |                     |               |               |                       |                               |               |
| Within the past 6 months  | 2.8%          | 22.8%         | 29.5%               | 0.0%                | 3.0%              | 2.6%                | 2.6%          | 3.0%          | 3.3%                  | 2.7%                          | 3.2%          |
| 6–11 months ago   | 3.6%          | 37.6%         | 35.2%               | 0.0%                | 3.6%              | 3.7%                | 2.9%          | 4.1%          | 3.9%                  | 4.0%                          | 1.9%          |
| 12–17 months ago  | 3.6%          | 39.6%         | 35.3%               | 0.0%                | 3.3%              | 3.9%                | 3.2%          | 4.5%          | 5.0%                  | 4.3%                          | 1.5%          |
| 18–23 months ago  | 8.5%          | 0.0%          | 0.0%                | 9.5%                | 8.5%              | 10.5%               | 6.4%          | 6.3%          | 9.8%                  | 10.3%                         | 2.2%          |
| 2–4 years ago   | 22.0%         | 0.0%          | 0.0%                | 24.4%               | 19.2%             | 26.7%               | 17.6%         | 27.0%         | 16.3%                 | 23.8%                         | 15.5%         |
| 5–6 years ago   | 17.3%         | 0.0%          | 0.0%                | 19.2%               | 19.9%             | 14.1%               | 15.8%         | 17.8%         | 13.0%                 | 18.2%                         | 13.8%         |
| 7–8 years ago   | 9.3%          | 0.0%          | 0.0%                | 10.3%               | 9.1%              | 7.5%                | 11.7%         | 10.9%         | 8.1%                  | 9.0%                          | 10.0%         |
| 9–10 years ago  | 8.8%          | 0.0%          | 0.0%                | 9.8%                | 7.8%              | 8.3%                | 11.1%         | 10.9%         | 6.5%                  | 8.7%                          | 9.5%          |
| More than 10 years ago  | 24.1%         | 0.0%          | 0.0%                | 26.8%               | 25.6%             | 22.7%               | 28.7%         | 15.5%         | 34.1%                 | 19.0%                         | 42.4%         |
| <b>TOTAL</b>  | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       | <b>100.0%</b>     | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         | <b>100.0%</b>                 | <b>100.0%</b> |
| <b>Purchased last boat new or pre-owned</b>   |               |               |                     |                     |                   |                     |               |               |                       |                               |               |
| New   | 45.9%         | 100.0%        | 0.0%                | 48.8%               | 44.9%             | 46.4%               | 55.7%         | 38.1%         | 19.7%                 | 45.3%                         | 48.1%         |
| Pre-owned   | 54.1%         | 0.0%          | 100.0%              | 51.2%               | 55.1%             | 53.6%               | 44.3%         | 61.9%         | 80.3%                 | 54.7%                         | 51.9%         |
| <b>TOTAL</b>  | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       | <b>100.0%</b>     | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         | <b>100.0%</b>                 | <b>100.0%</b> |
| <b>When purchased my last boat</b>  |               |               |                     |                     |                   |                     |               |               |                       |                               |               |
| New   | 2.0%          | 100.0%        | 0.0%                | 0.0%                | 1.9%              | 2.3%                | 1.8%          | 2.0%          | 1.8%                  | 2.4%                          | 0.5%          |
| Pre-owned   | 8.0%          | 0.0%          | 100.0%              | 0.0%                | 8.0%              | 7.9%                | 6.8%          | 9.6%          | 10.4%                 | 8.6%                          | 6.0%          |
| More than 18 months ago   | 90.0%         | 0.0%          | 0.0%                | 100.0%              | 90.1%             | 89.8%               | 91.4%         | 88.4%         | 87.8%                 | 89.0%                         | 93.5%         |
| <b>TOTAL</b>  | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       | <b>100.0%</b>     | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         | <b>100.0%</b>                 | <b>100.0%</b> |
| <b>Type of boat last purchased</b>  |               |               |                     |                     |                   |                     |               |               |                       |                               |               |
| Aluminum outboard boat  | 42.0%         | 40.1%         | 41.9%               | 42.0%               | 100.0%            | 0.0%                | 0.0%          | 0.0%          | 0.0%                  | 39.1%                         | 52.3%         |
| Pontoon boat  | 38.2%         | 54.3%         | 37.3%               | 37.9%               | 38.2%             | 0.0%                | 0.0%          | 0.0%          | 0.0%                  | 40.8%                         | 31.3%         |
| Jon boat  | 11.6%         | 12.5%         | 16.2%               | 11.2%               | 11.6%             | 0.0%                | 0.0%          | 0.0%          | 0.0%                  | 10.6%                         | 14.2%         |
| Bass boat   | 19.8%         | 18.7%         | 19.8%               | 19.8%               | 19.8%             | 0.0%                | 0.0%          | 0.0%          | 0.0%                  | 20.9%                         | 16.8%         |
| Utility boat  | 19.0%         | 6.9%          | 15.0%               | 19.6%               | 19.0%             | 0.0%                | 0.0%          | 0.0%          | 0.0%                  | 16.2%                         | 26.4%         |
| Other   | 11.4%         | 7.6%          | 11.7%               | 11.5%               | 11.4%             | 0.0%                | 0.0%          | 0.0%          | 0.0%                  | 11.5%                         | 11.3%         |
| Fiberglass outboard boat  | 28.4%         | 32.5%         | 28.0%               | 28.3%               | 0.0%              | 100.0%              | 0.0%          | 0.0%          | 0.0%                  | 30.1%                         | 22.2%         |
| Sterndrive boat   | 15.9%         | 14.3%         | 13.5%               | 16.2%               | 0.0%              | 0.0%                | 100.0%        | 0.0%          | 0.0%                  | 16.0%                         | 15.7%         |
| Inboard boat  | 12.5%         | 12.0%         | 15.1%               | 12.3%               | 0.0%              | 0.0%                | 0.0%          | 100.0%        | 0.0%                  | 13.4%                         | 9.3%          |
| Sailboat  | 1.2%          | 1.1%          | 1.5%                | 1.2%                | 0.0%              | 0.0%                | 0.0%          | 0.0%          | 100.0%                | 1.4%                          | 0.5%          |
| <b>TOTAL</b>  | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       | <b>100.0%</b>     | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         | <b>100.0%</b>                 | <b>100.0%</b> |
| <b>Size of boat last purchased</b>  |               |               |                     |                     |                   |                     |               |               |                       |                               |               |
| 18 feet and under   | 48.7%         | 35.3%         | 47.3%               | 49.1%               | 65.6%             | 48.2%               | 28.9%         | 22.9%         | 0.0%                  | 45.6%                         | 59.7%         |
| 19' to 26'  | 42.1%         | 46.2%         | 41.3%               | 42.1%               | 31.7%             | 44.8%               | 54.5%         | 55.6%         | 40.2%                 | 43.2%                         | 38.4%         |
| Over 26 feet  | 9.2%          | 18.5%         | 11.4%               | 8.8%                | 2.7%              | 7.0%                | 16.6%         | 21.5%         | 59.8%                 | 11.2%                         | 1.9%          |
| <b>TOTAL</b>  | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>       | <b>100.0%</b>       | <b>100.0%</b>     | <b>100.0%</b>       | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>         | <b>100.0%</b>                 | <b>100.0%</b> |
| <b>AVERAGE BOAT SIZE</b>  | <b>20</b>     | <b>23</b>     | <b>20</b>           | <b>20</b>           | <b>18</b>         | <b>20</b>           | <b>22</b>     | <b>23</b>     | <b>30</b>             | <b>20</b>                     | <b>18</b>     |



**TABLE 18.5 (continued)**

|   | AMOUNT SPENT IN 2011 |               |               |
|---|----------------------|---------------|---------------|
|   | \$500 OR LESS        | \$501-\$1,000 | \$1,000+      |
| <b>Please indicate the category that best describes your total annual household income in 2011.</b> |                      |               |               |
| Under \$25,000  | 3.3%                 | 1.2%          | 1.2%          |
| \$25,000-\$49,999   | 11.9%                | 5.3%          | 7.8%          |
| \$50,000-\$74,999   | 22.8%                | 23.4%         | 14.2%         |
| \$75,000-\$99,999   | 24.6%                | 20.7%         | 24.0%         |
| \$100,000-\$149,999   | 22.9%                | 26.6%         | 25.3%         |
| \$150,000-\$199,999   | 8.4%                 | 12.6%         | 14.4%         |
| \$200,000-\$249,999   | 3.4%                 | 6.3%          | 6.7%          |
| Over \$250,000  | 2.7%                 | 3.9%          | 6.4%          |
| <b>TOTAL</b>  | <b>100.0%</b>        | <b>100.0%</b> | <b>100.0%</b> |
| <b>Number of boats owned</b>  |                      |               |               |
| One   | 75.1%                | 71.8%         | 74.6%         |
| Two   | 17.3%                | 18.6%         | 18.1%         |
| Three to four   | 7.0%                 | 6.4%          | 5.9%          |
| Five or more  | 0.6%                 | 3.2%          | 1.4%          |
| <b>TOTAL</b>  | <b>100.0%</b>        | <b>100.0%</b> | <b>100.0%</b> |
| <b>AVERAGE OF BOATS OWNED</b>   | <b>1.37</b>          | <b>1.56</b>   | <b>1.41</b>   |
| <b>When purchased your last boat</b>  |                      |               |               |
| Within the past 6 months  | 2.4%                 | 3.3%          | 2.8%          |
| 6-11 months ago   | 3.6%                 | 5.2%          | 4.1%          |
| 12-17 months ago  | 3.4%                 | 4.5%          | 5.5%          |
| 18-23 months ago  | 8.1%                 | 11.4%         | 13.3%         |
| 2-4 years ago   | 21.0%                | 24.0%         | 28.3%         |
| 5-6 years ago   | 19.7%                | 15.0%         | 17.7%         |
| 7-8 years ago   | 7.9%                 | 12.7%         | 8.5%          |
| 9-10 years ago  | 10.0%                | 6.0%          | 8.2%          |
| More than 10 years ago  | 23.9%                | 17.9%         | 11.6%         |
| <b>TOTAL</b>  | <b>100.0%</b>        | <b>100.0%</b> | <b>100.0%</b> |
| <b>Purchased last boat new or pre-owned</b>   |                      |               |               |
| New   | 42.2%                | 45.6%         | 50.6%         |
| Pre-owned   | 57.8%                | 54.4%         | 49.4%         |
| <b>TOTAL</b>  | <b>100.0%</b>        | <b>100.0%</b> | <b>100.0%</b> |
| <b>When purchased my last boat</b>  |                      |               |               |
| New   | 1.5%                 | 2.4%          | 3.9%          |
| Pre-owned   | 7.9%                 | 10.6%         | 8.5%          |
| More than 18 months ago   | 90.6%                | 87.0%         | 87.6%         |
| <b>TOTAL</b>  | <b>100.0%</b>        | <b>100.0%</b> | <b>100.0%</b> |
| <b>Type of boat last purchased</b>  |                      |               |               |
| Aluminum outboard boat  | 48.7%                | 35.4%         | 25.7%         |
| Pontoon boat  | 35.2%                | 37.9%         | 61.1%         |
| Jon boat  | 14.8%                | 1.6%          | 6.2%          |
| Bass boat   | 19.4%                | 32.4%         | 14.8%         |
| Utility boat  | 19.7%                | 12.9%         | 8.2%          |
| Other   | 10.9%                | 15.2%         | 9.7%          |
| Fiberglass outboard boat  | 27.2%                | 31.9%         | 34.0%         |
| Stern-drive boat  | 12.3%                | 17.2%         | 20.9%         |
| Inboard boat  | 10.6%                | 14.7%         | 17.3%         |
| Sailboat  | 1.2%                 | 0.8%          | 2.1%          |
| <b>TOTAL</b>  | <b>100.0%</b>        | <b>100.0%</b> | <b>100.0%</b> |
| <b>Size of boat last purchased</b>  |                      |               |               |
| 18 feet and under   | 56.1%                | 45.0%         | 28.3%         |
| 19' to 26'  | 39.1%                | 44.5%         | 49.4%         |
| Over 26 feet  | 4.8%                 | 10.5%         | 22.3%         |
| <b>TOTAL</b>  | <b>100.0%</b>        | <b>100.0%</b> | <b>100.0%</b> |
| <b>AVERAGE BOAT SIZE</b>  | <b>19</b>            | <b>21</b>     | <b>23</b>     |

## 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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