

National Marine Manufacturers Association (NMMA) Canada

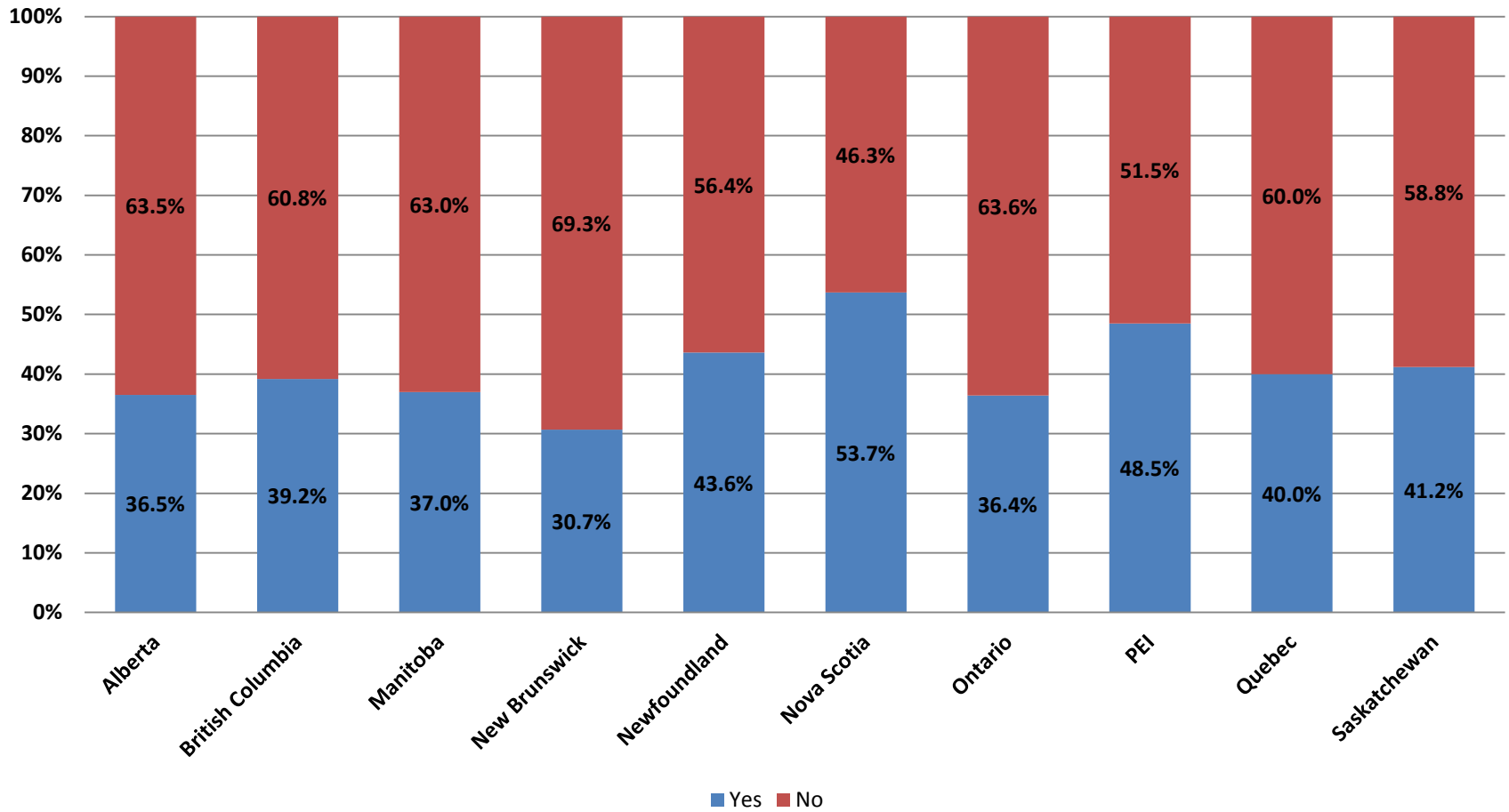
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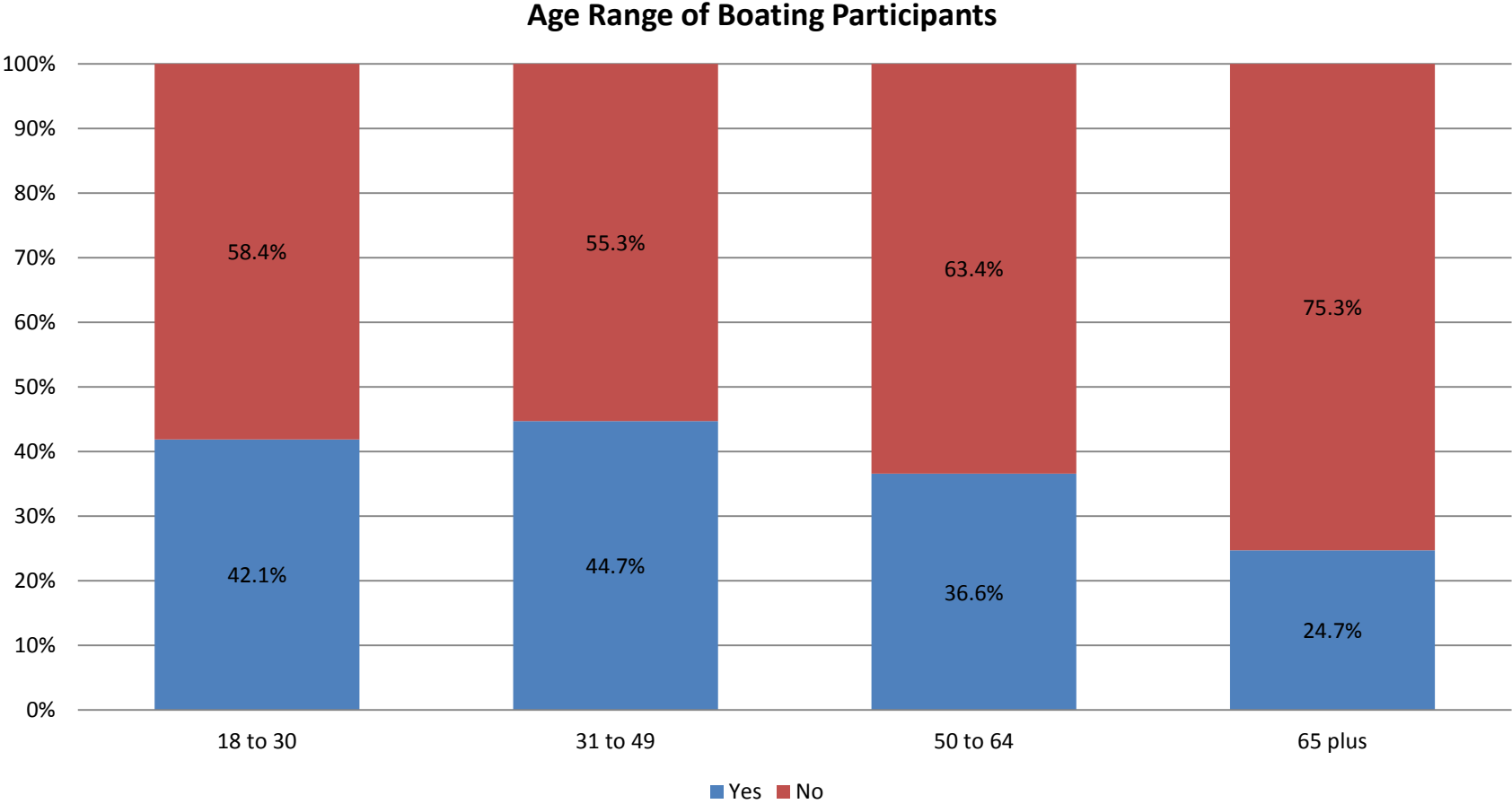
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2011 Boating Participation by Province

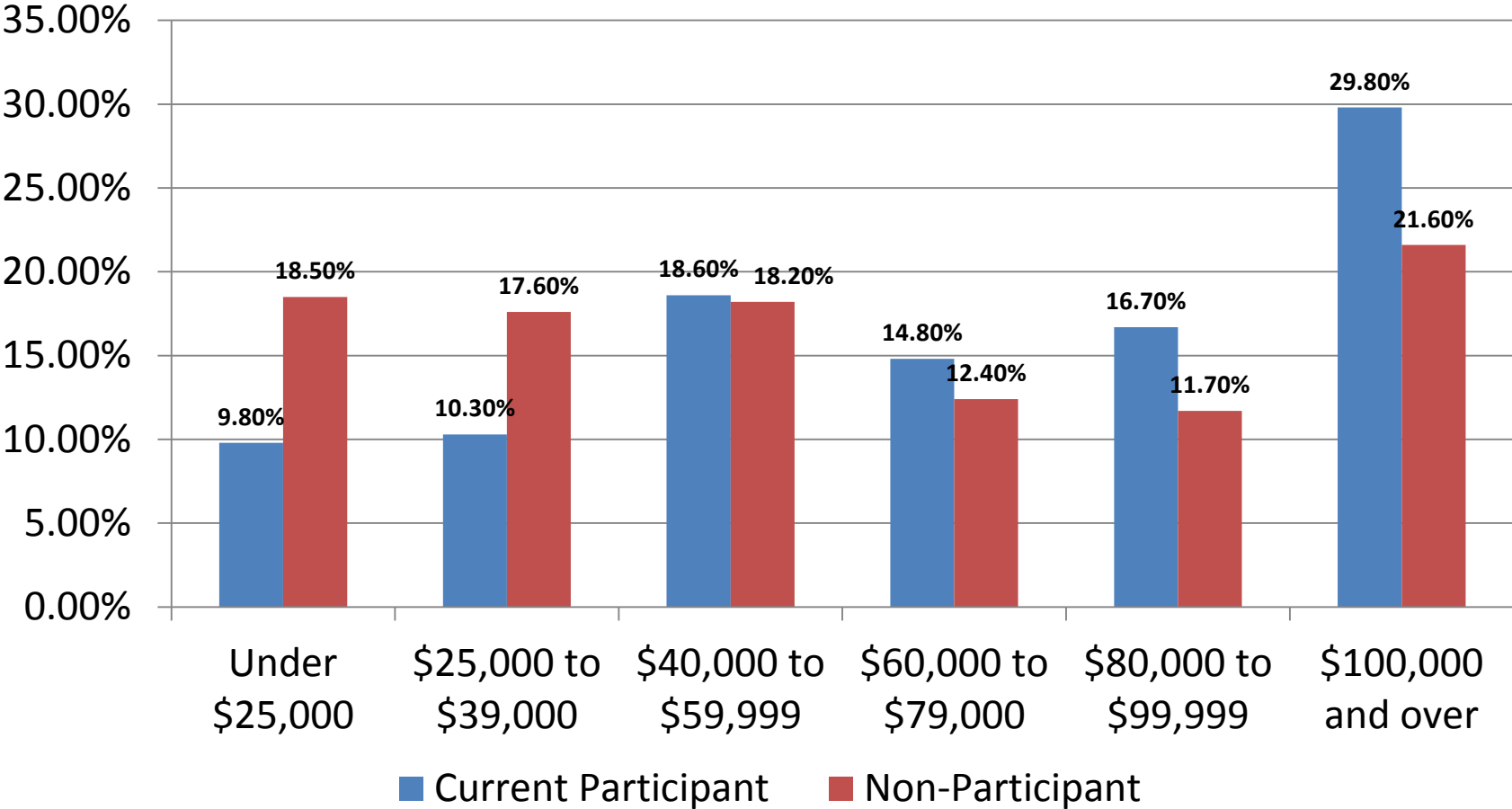
(Source for slides 2-14: NMMA Canadian Statistical Abstract)



Boating Participation by Age



Boating Participation by Household Income



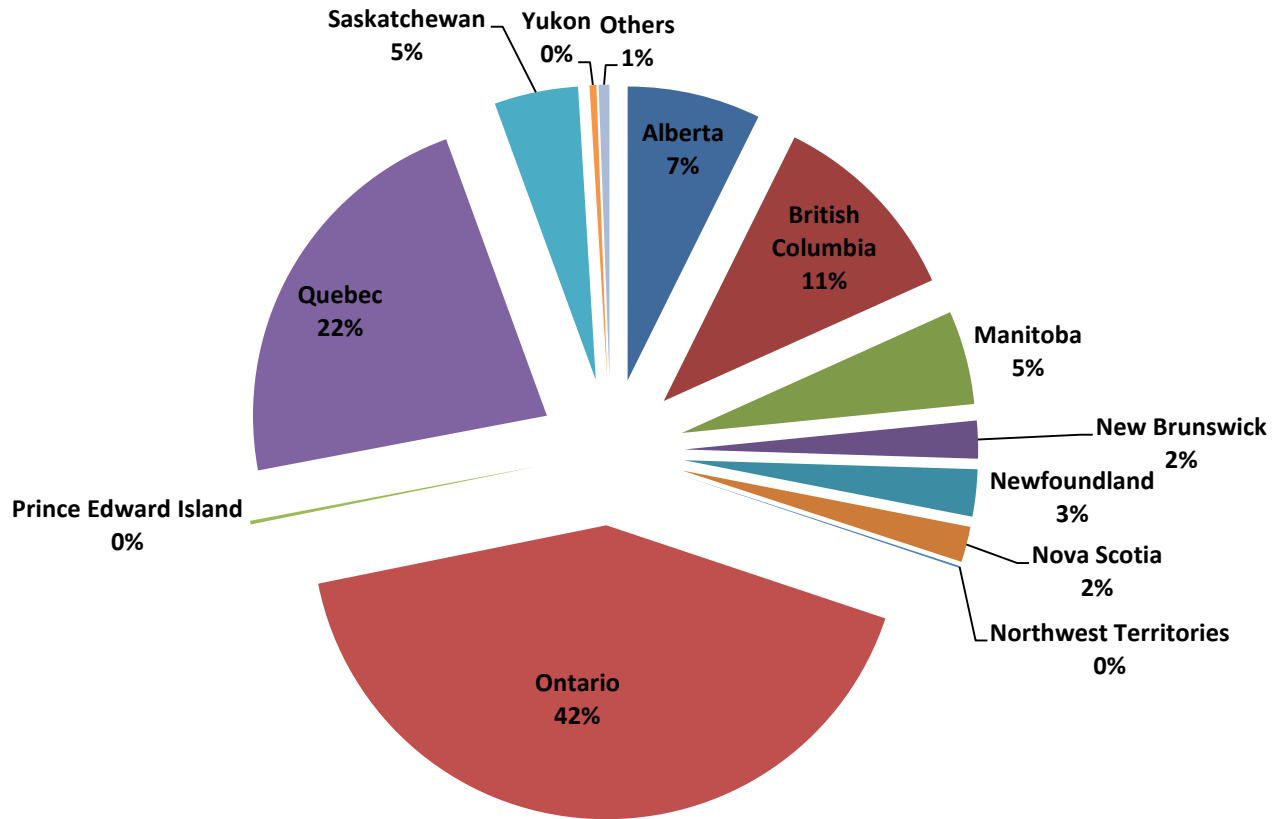
Boating Activities Current Participants Engaged in During Boating

	Alberta	British Columbia	Manitoba	New Brunswick	Newfoundland	Nova Scotia	Ontario	Prince Edward Island	Quebec	Saskatchewan
N=	204	265	71	47	33	59	766	9	487	60
Swimming	27.3%	28.3%	26.6%	20.0%	28.3%	36.0%	26.7%	41.6%	22.5%	31.3%
Sightseeing	26.3%	25.9%	27.3%	15.6%	23.1%	24.4%	24.4%	47.3%	18.0%	15.0%
Nature observation	21.5%	27.4%	21.2%	28.5%	21.9%	19.9%	20.9%	41.6%	23.0%	15.2%
Fishing	23.7%	24.2%	25.0%	13.3%	41.9%	19.6%	20.1%	28.2%	20.1%	27.7%
Entertaining family/friends	21.6%	23.0%	27.6%	16.1%	31.8%	26.8%	20.7%	23.7%	14.9%	24.7%
Sunbathing	20.8%	21.9%	15.4%	12.9%	12.4%	19.2%	16.9%	22.5%	20.5%	23.4%
Canoeing	19.2%	16.1%	13.0%	24.1%	15.9%	21.3%	17.3%	41.6%	13.3%	13.0%
Quiet water paddling	18.0%	17.8%	16.7%	10.2%	10.8%	18.1%	18.1%	41.6%	12.3%	12.8%
Cruising	16.7%	20.9%	19.9%	9.8%	24.3%	14.0%	16.4%	29.4%	8.2%	21.0%
Kayaking	10.4%	10.6%	4.7%	6.7%	6.5%	13.8%	7.0%	22.5%	10.0%	3.7%
Snorkeling	7.5%	5.7%	3.1%	0.4%	0.5%	7.0%	7.1%	22.5%	3.9%	11.4%

Purchase Intent on Buying a Boat

	Alberta	British Columbia	Manitoba	New Brunswick	Newfoundland	Nova Scotia	Ontario	Prince Edward Island	Quebec	Saskatchewan
N=	158	201	55	37	27	44	598	5	397	46
Actively shopping plan to buy within next 12 months	0.9%	2.1%	1.6%	2.6%	6.1%	0.6%	0.7%	0.0%	0.0%	2.1%
Seriously considering plan to buy in next 3 years	9.1%	8.2%	12.8%	8.5%	13.6%	3.2%	3.4%	0.0%	4.0%	13.3%
Plan to buy but not in next 3 years	12.7%	17.0%	13.4%	13.3%	19.7%	15.0%	13.4%	36.3%	15.2%	15.9%
No interest in buying a boat	77.3%	72.7%	72.3%	75.6%	60.7%	81.3%	82.6%	63.7%	80.9%	68.7%

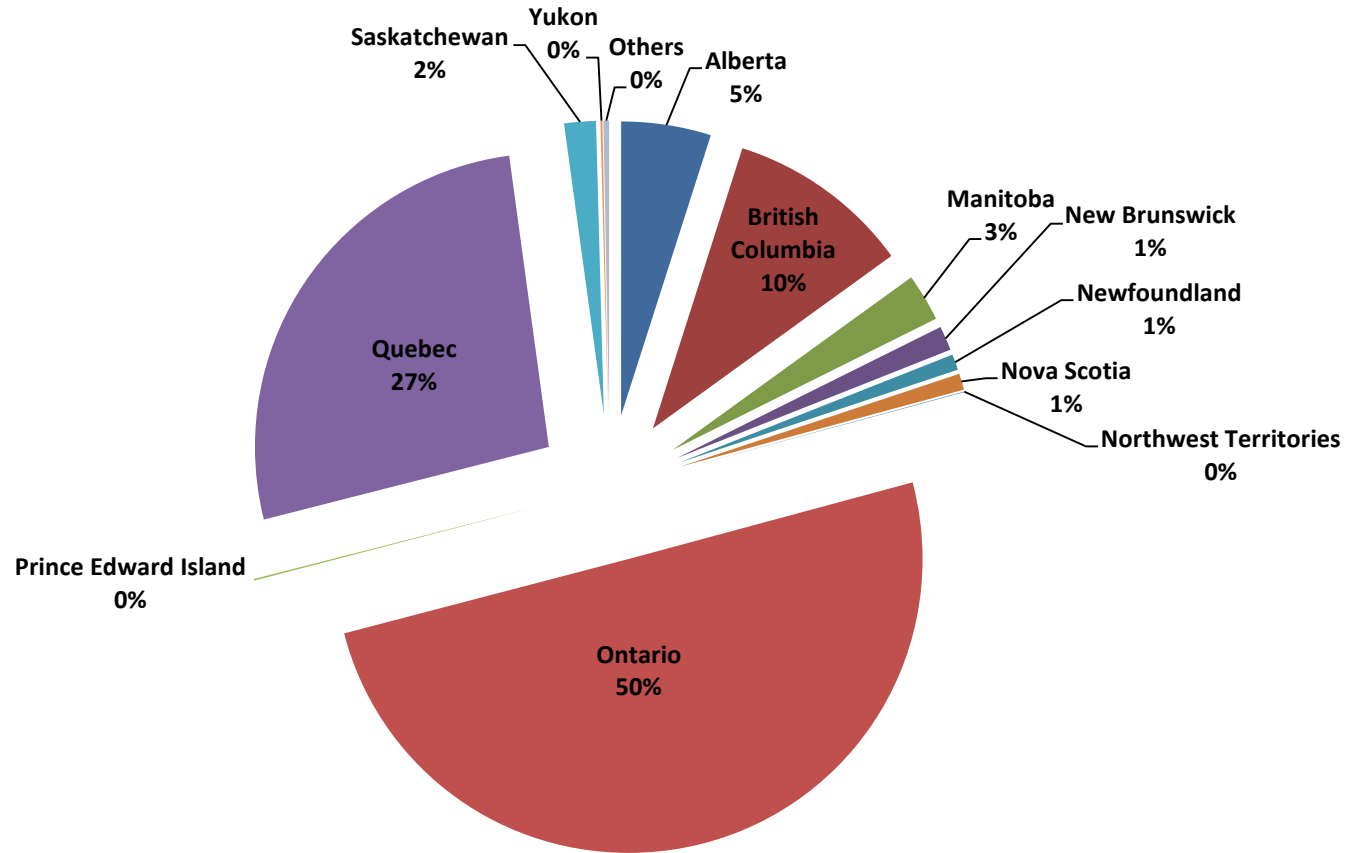
Percent of New Outboard Sales by Provinces 2011



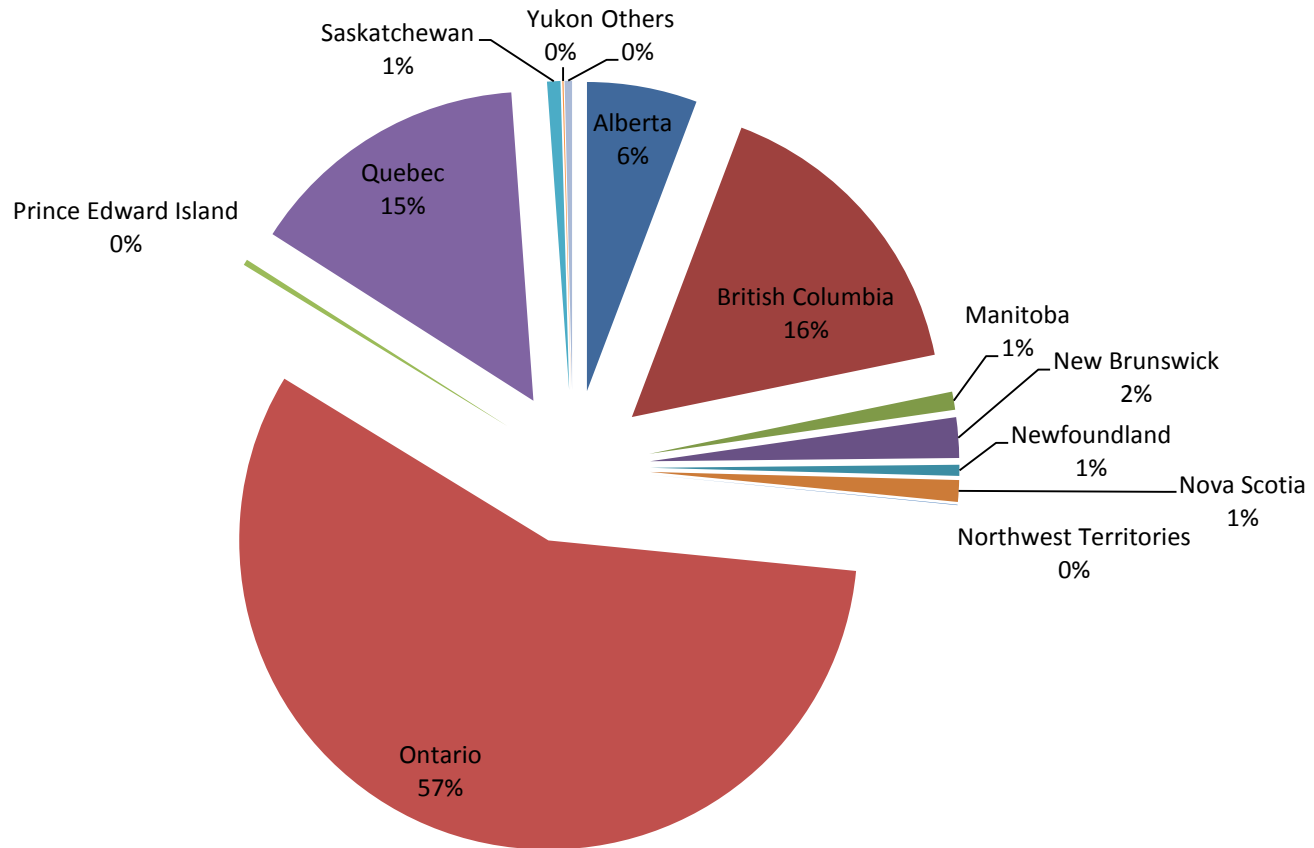
Sales of New Personal Watercraft by Province for 2011

	Personal Watercraft Unit Sales	Percent of Total
Alberta	614	10.1%
British Columbia	386	6.4%
Manitoba	265	4.4%
New Brunswick	123	2.0%
Newfoundland	40	0.7%
Nova Scotia	78	1.3%
Northwest Territories	2	0.0%
Ontario	3,169	52.2%
Prince Edward Island	10	0.2%
Quebec	1,210	19.9%
Saskatchewan	163	2.7%
Yukon	1	0.0%
Others	13	0.2%

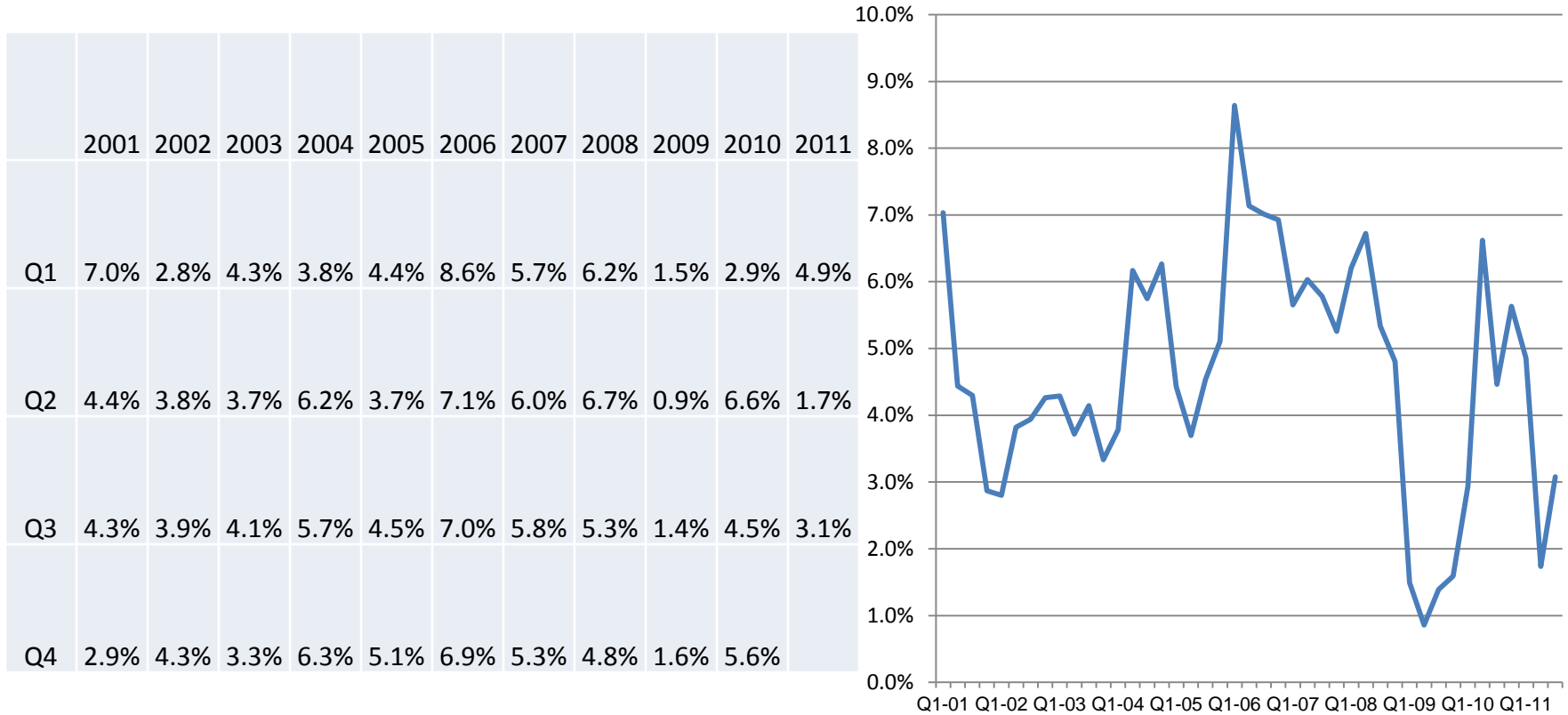
Percent of Pre-owned Outboard Boat Sales by Province for 2011



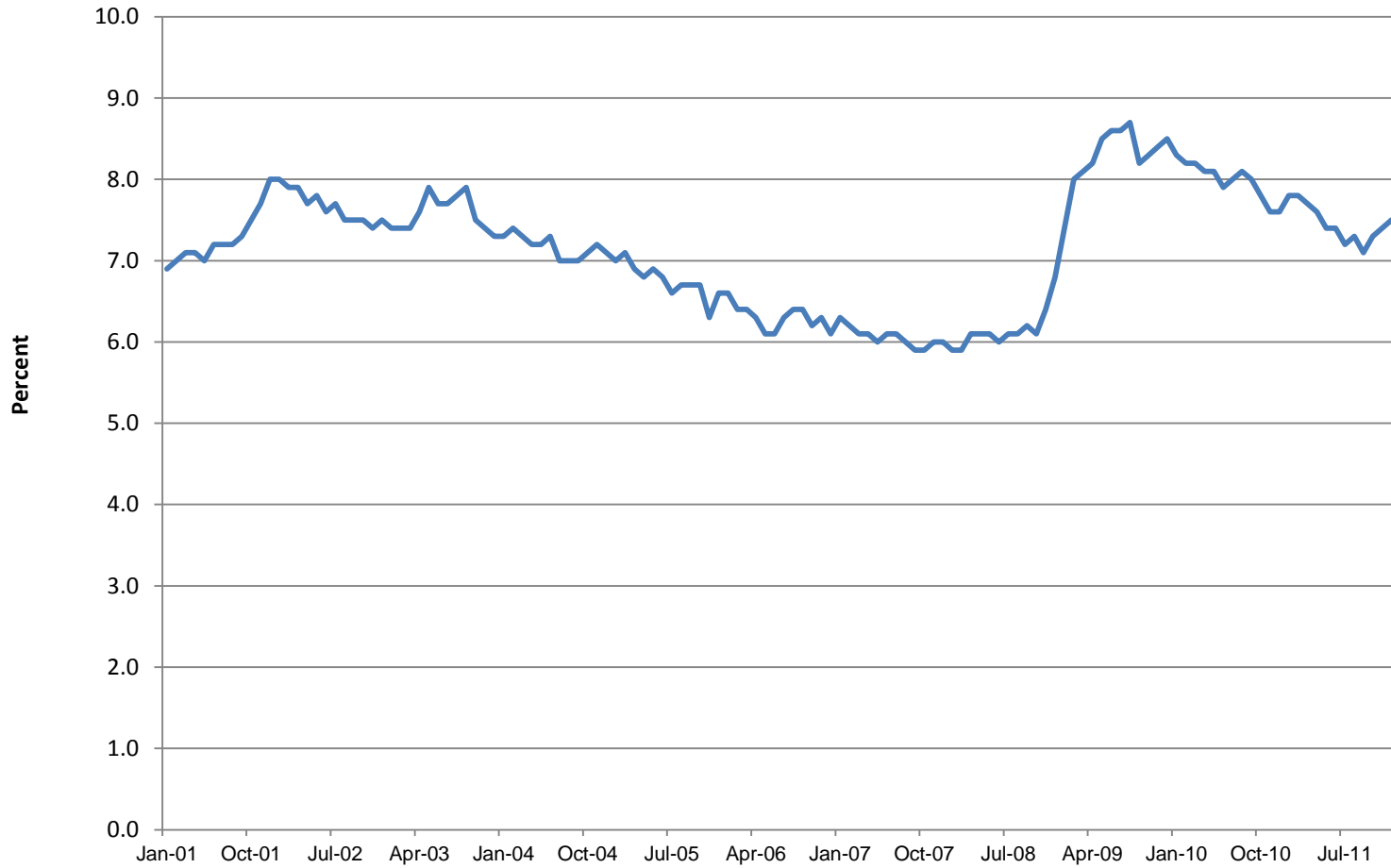
Percent of Pre-owned Sterndrive Boat Sales by Province for 2011



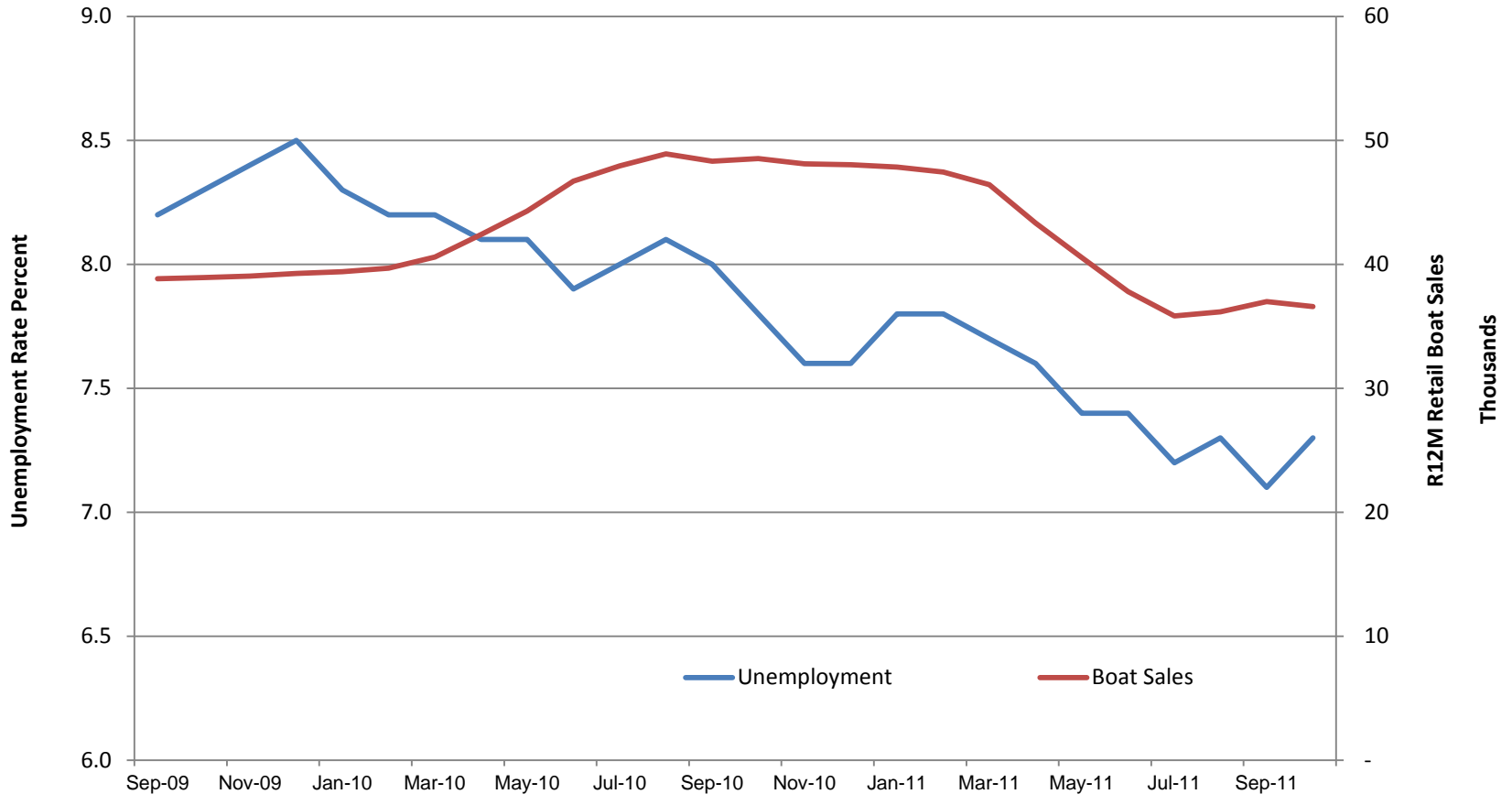
Percent Disposable Income



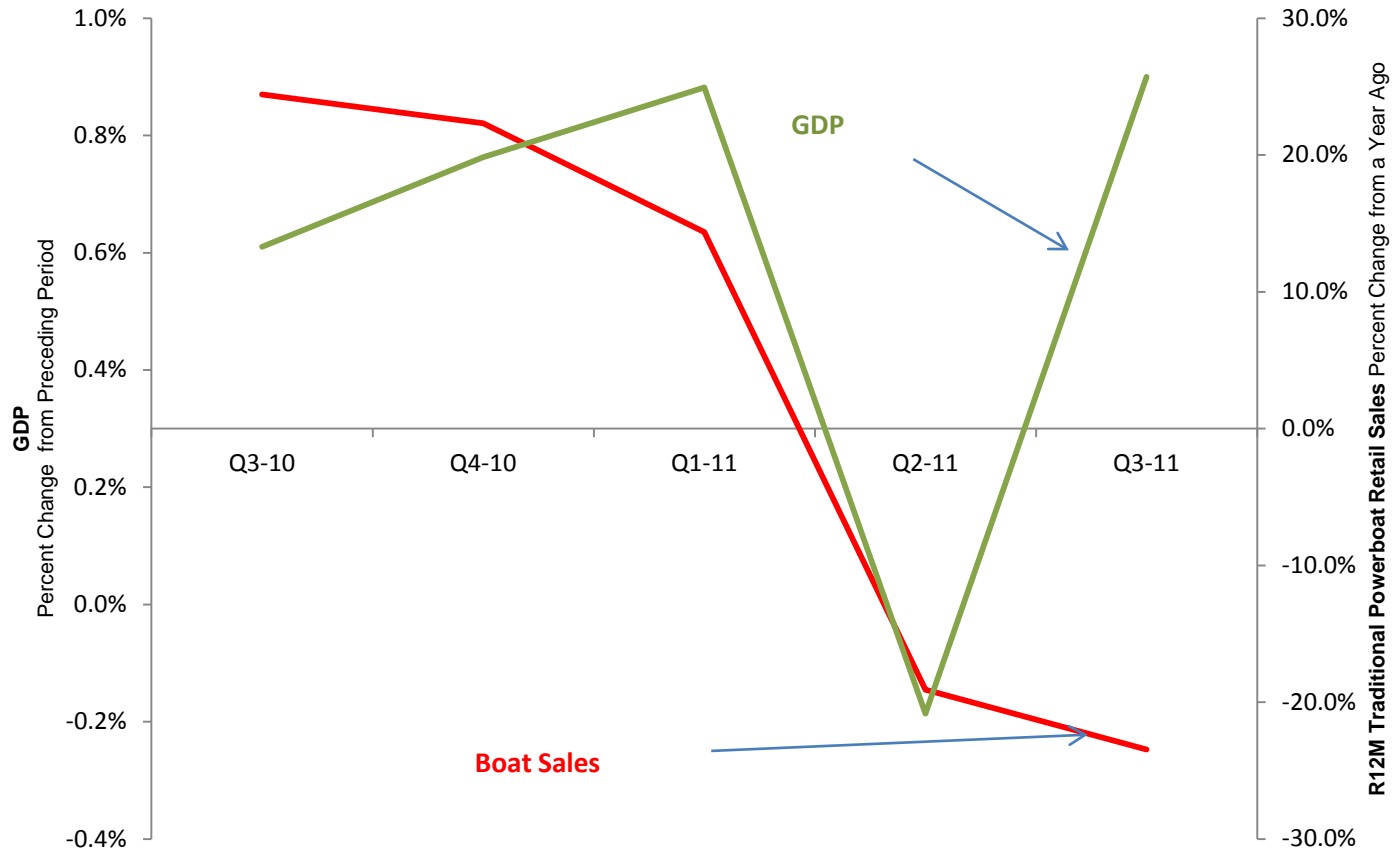
Unemployment Rate



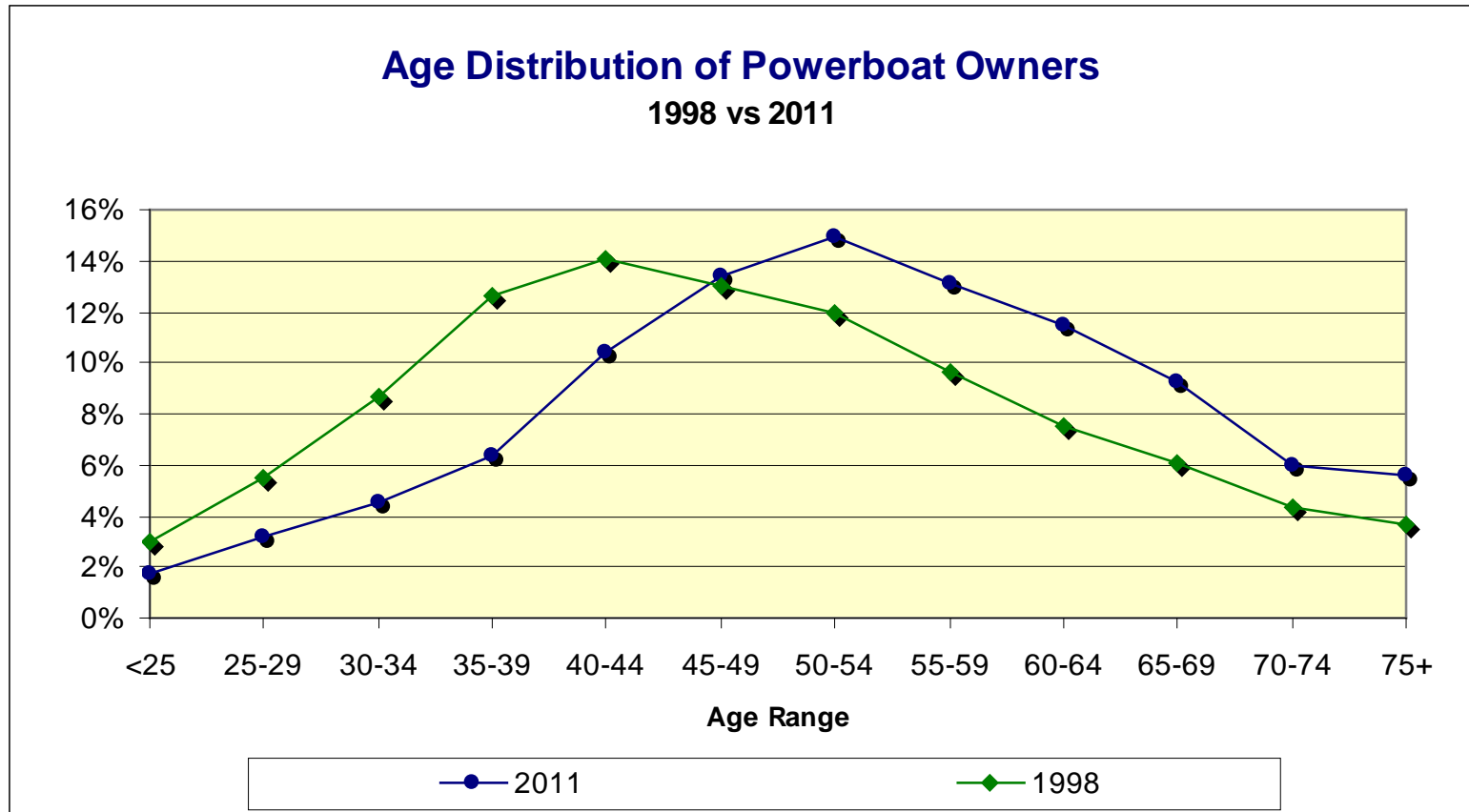
Unemployment vs Retail Boat Sales



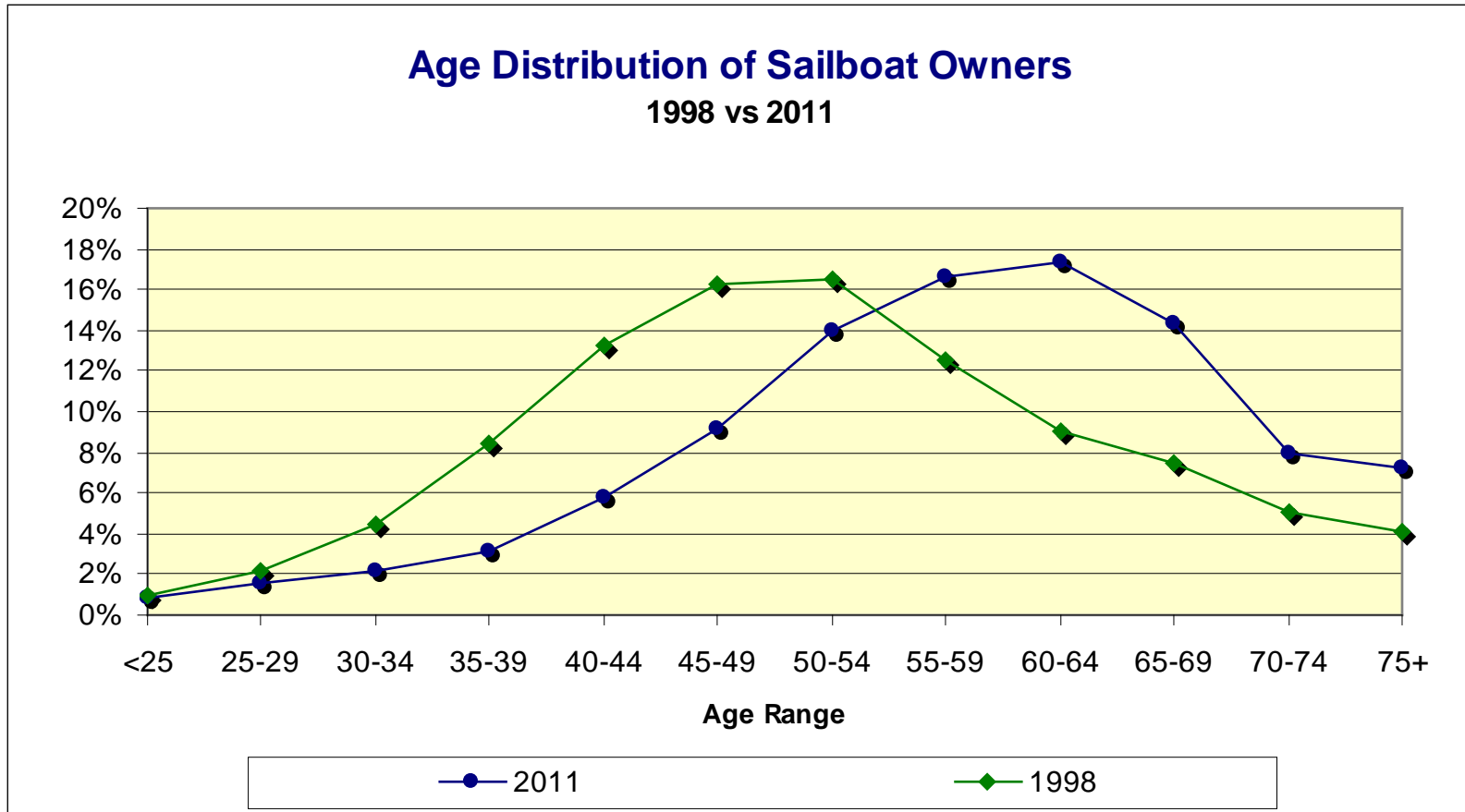
GDP vs Retail Boat Sales



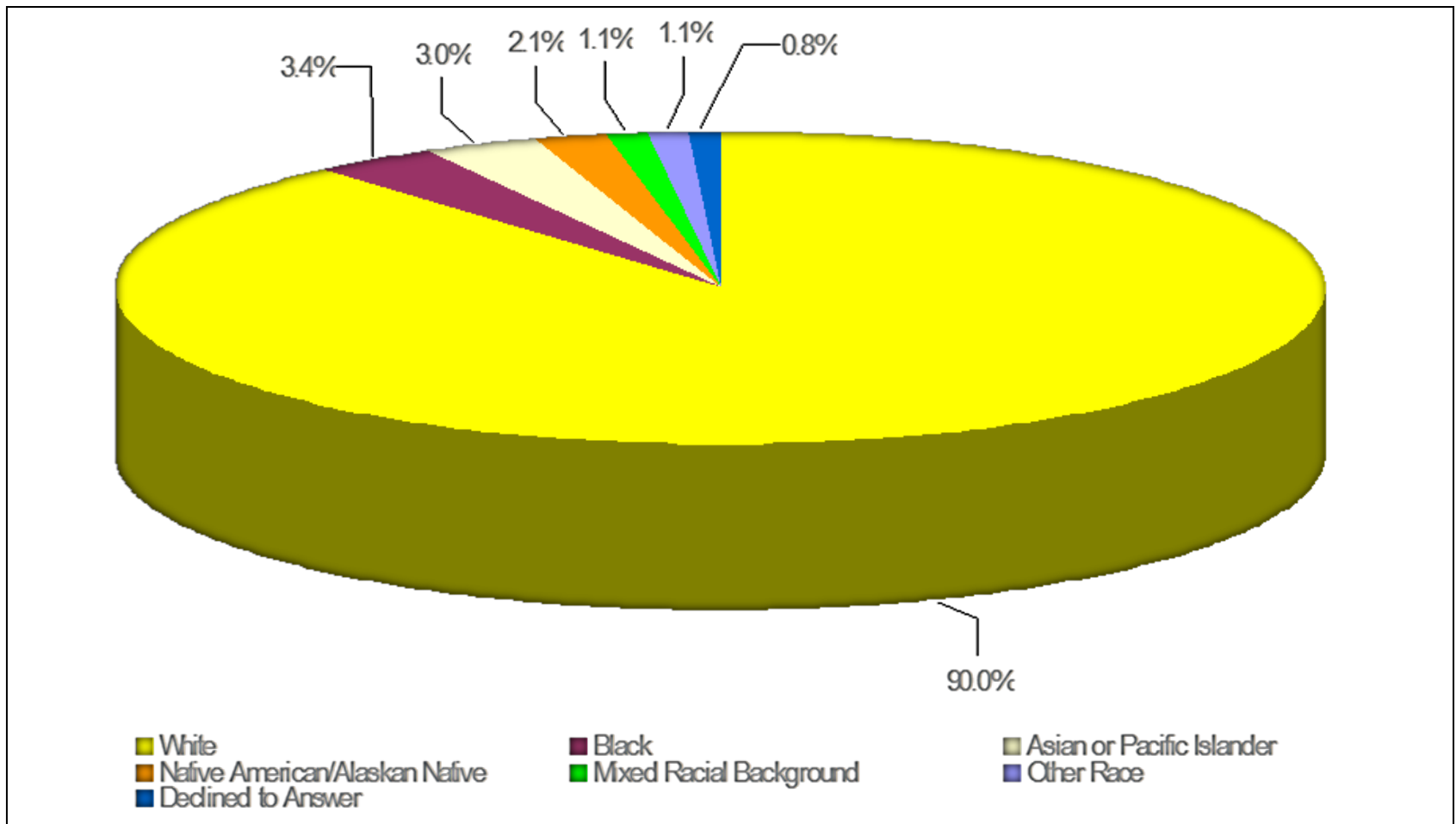
Meanwhile, boat owners have gotten older. Today there are fewer owners in their 30s and more in their 50s and 60s. (U.S data)



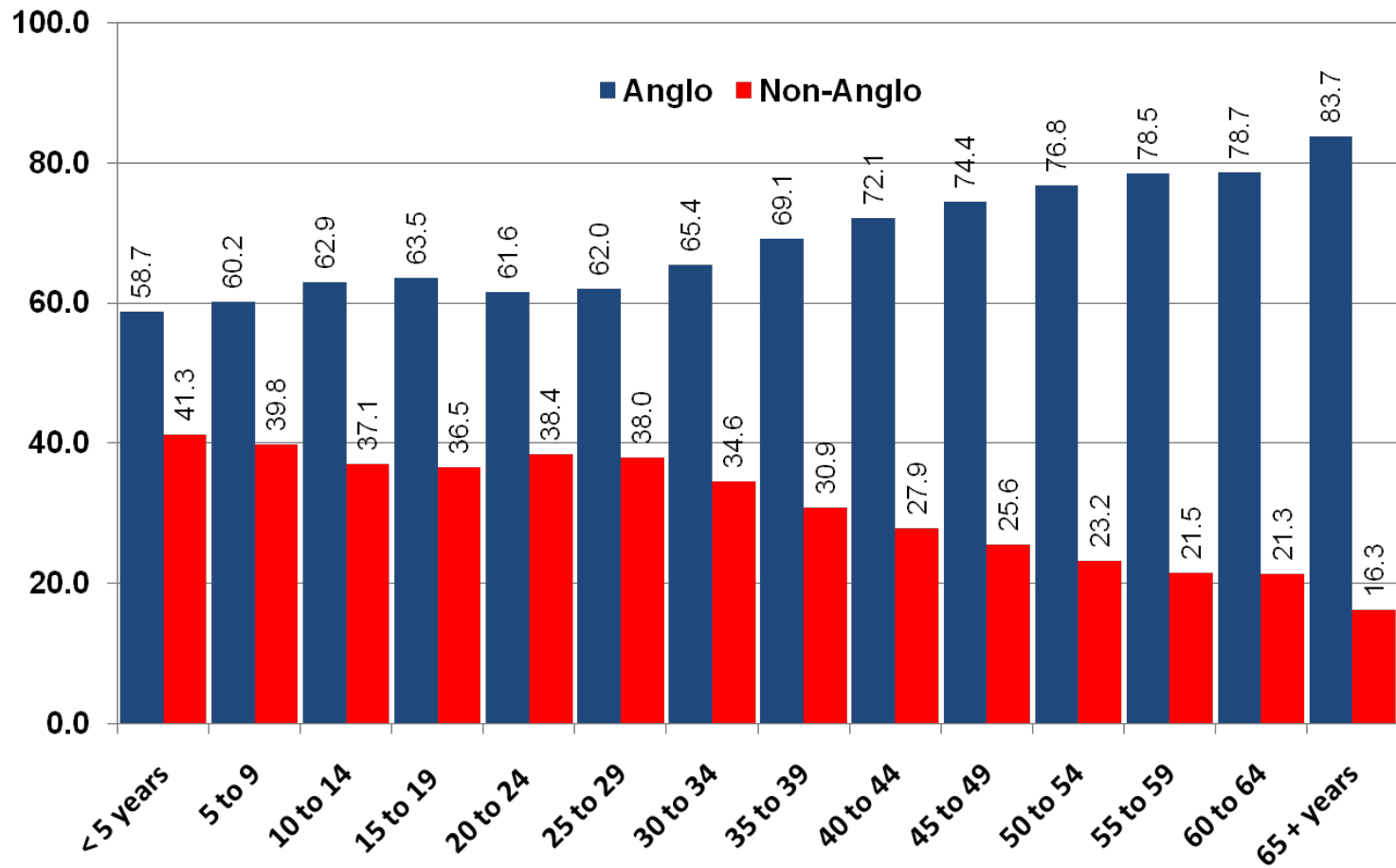
This is especially evident among sailors.



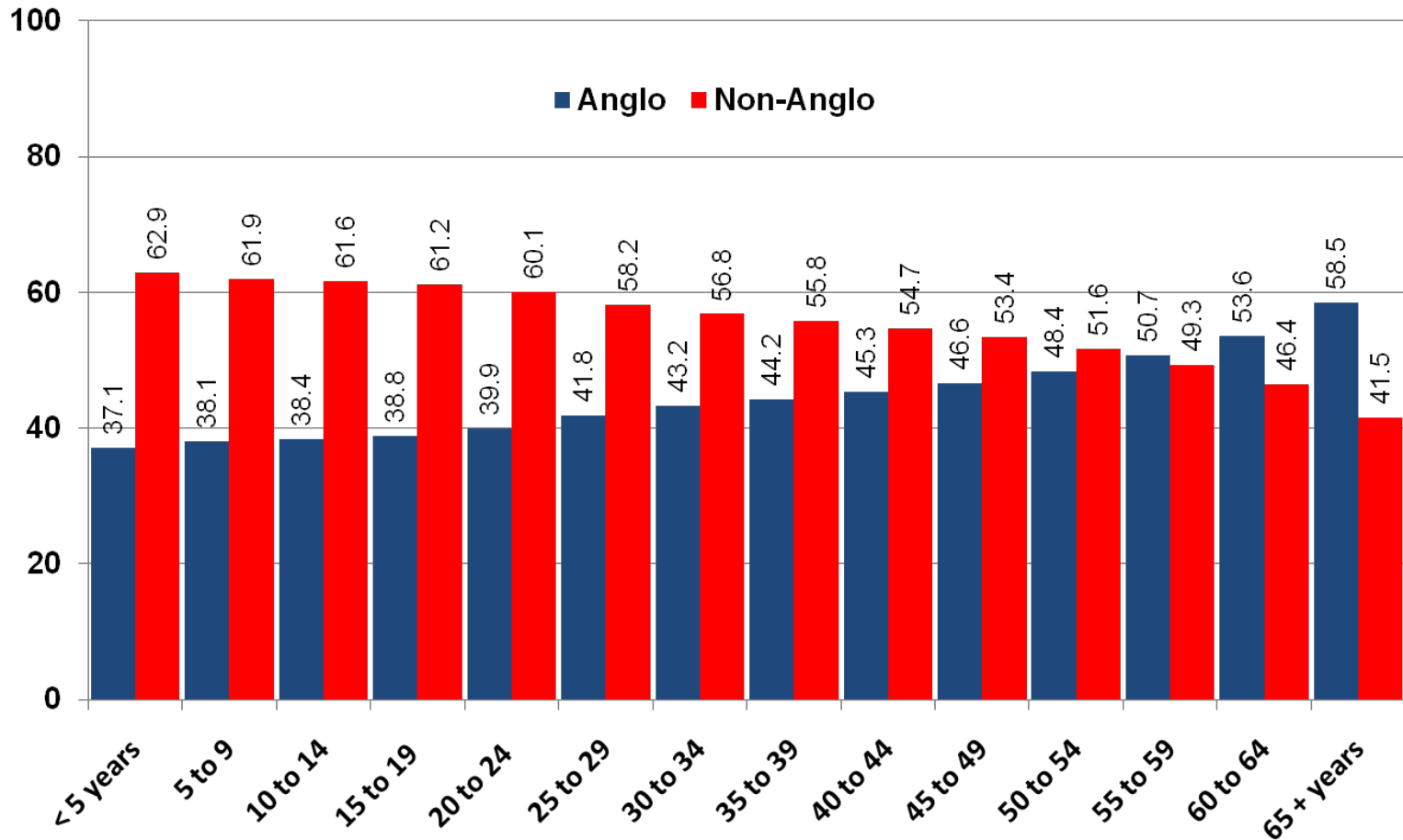
U.S. Boat Owner Demographics by Ethnicity 2010 Any Powerboat



Percent of U.S. Population by Age Group and Ethnicity, 2000



Percent of U.S. Population by Age Group and Ethnicity, 2050



Canada – Visible Minority Population, Metropolitan Areas (Census 2006)

	Abbotsford-Mission number	Vancouver	Victoria
Total population	156,640	2,097,965	325,060
Visible minority population	35,715	875,295	33,870
South Asian	25,580	207,160	7,210
Chinese	2,245	381,535	12,330
Black	930	20,670	2,360
Filipino	730	78,890	2,760
Latin American	1,275	22,695	1,845
Arab	150	7,430	500
Southeast Asian	1,665	33,470	1,585
West Asian	210	28,160	575
Korean	1,615	44,825	1,235
Japanese	830	25,425	2,280
Visible minority, not included elsewhere	35	2,920	260
Multiple visible minority	450	22,115	930

Metropolitan Areas Continued

	Kingston	Peterborough	Oshawa	Toronto	Hamilton
	number				
Total population	148,475	115,140	328,070	5,072,075	683,450
Visible minority population	8,600	3,095	33,700	2,174,065	84,295
South Asian	1,785	665	6,195	684,070	19,970
Chinese	2,470	730	3,690	486,325	11,660
Black	1,165	575	12,605	352,220	16,480
Filipino	485	110	2,155	171,985	4,880
Latin American	745	255	1,665	99,290	6,760
Arab	370	80	1,135	53,430	6,500
Southeast Asian	330	180	670	70,215	6,805
West Asian	280	105	1,195	75,470	3,910
Korean	325	260	540	55,270	2,255
Japanese	255	70	795	19,010	1,415
Visible minority, not included elsewhere	170	40	1,330	46,705	1,345
Multiple visible minority	215	35	1,705	60,070	2,315

NMMA Program in the U.S.

- Take the Helm Program
- 5 Shows in Norwalk, Tampa, Miami, Chicago and San Diego
- 600 people received training in docking, anchoring, close quarters handling, electronics

Who Attended

- 67% Current Powerboat Only
- 6% Current Sail and Power
- 4% Current Sailboat Only
- 23% Not Current Owners
 - 8% Past Owners
 - 15% Never Owned

Their Experience Level

- 6% Non Boaters
- 34% New/Beginners
- 42% Intermediate
- 18% Advanced

Their Experience

- 25% Had No Prior Training
- 38% Self Taught or Taught by Friends
- 17% USCG Auxiliary
- 9% US Power Squadron
- 10% Other

Boat Safety Education

- Should Education include an On-the-Water component to demonstrate proficiency in boat operation?
- Should the Industry promote On-the-Water training as part of licensing with an On-the-Water Exam?

Some Final Thoughts

- Is the lack of on the water training requirement a barrier to growth and retention?
- 87% of all boats sold in the U.S. are pre-owned—most D2D
- Boater Turnover High (Infolink Stats)
- Do Mom's View Boating as dangerous because there is no requirement to demonstrate operator proficiency?
- How will we reach and educate them now that we know the boater could be changing?