



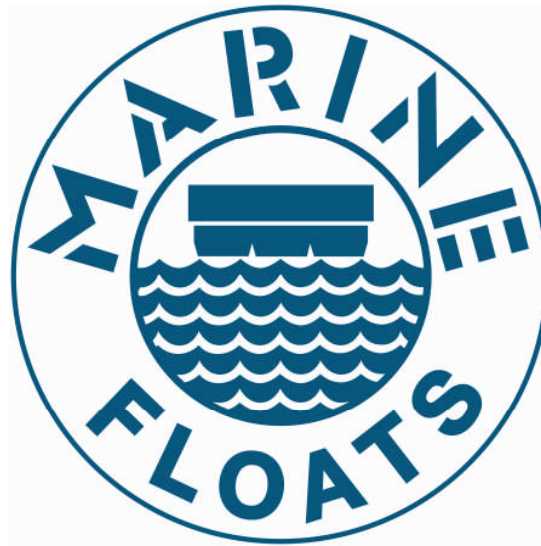
State of Boating Industry

Northwest Marina Conference
November 2, 2010
Presented by George Harris





Welcome & Thank You





Preview

- ***Recreational Boating Advocates***
- ***Boat Sales***
- ***Boat Shows***
- ***Boatyards***

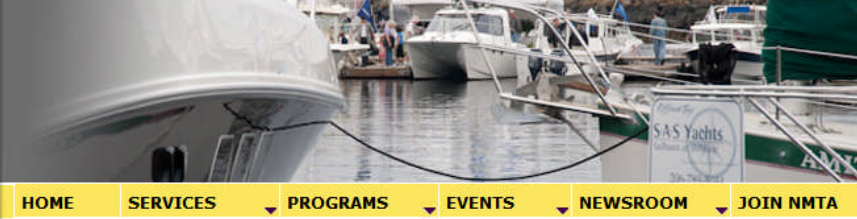
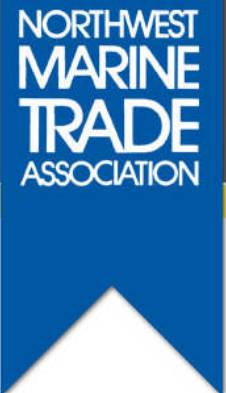


Unified & Collaborating in the Northwest

- Washington Public Ports Association (WPPA)
- Northwest Yacht Brokers Association (NYBA)
- Recreational Boating Assoc of Wash (RBAW)
- O'Loughlin Trade Shows – Tacoma Boat Show
- Pacific Northwest Yachting Association (PNYA)
- Washington Boating Alliance (WBA)
- Sport Fishing – NSIA, CCA, Fish Northwest



Boat Sales



**NORTHWEST
MARINE
TRADE
ASSOCIATION**

HOME SERVICES PROGRAMS EVENTS NEWSROOM JOIN NMTA

BOAT SALES DATA

Each quarter you will find boat sales data for Washington State available here. The NMTA has partnered with the Washington Sea Grant Program to bring this valuable data to NMTA member businesses. The data is from boat registration information supplied to the Washington State Department of Licensing. We hope this information helps with your business decisions.

GENERAL INFO

- [NMTA Member Search](#)
- [About the NMTA](#)
- [Get Involved](#)
- [Why Join the NMTA?](#)
- [Promote the NMTA](#)
- [Board of Trustees](#)
- [Staff Contacts](#)
- [Contact Us](#)

Each document below is a PDF. You will need Adobe Acrobat Reader. If you don't have Adobe Acrobat Reader, you can download it free from their site [here](#).

Quarterly Reports:

2010

[3rd Quarter - 2010](#)

[2nd Quarter - 2010](#)

[1st Quarter - 2010](#)



This sales data is a collaboration between Washington Sea Grant Program and NMTA.

Rough road ~~road~~ WATER

~~BOAT~~ Car dealers in Washington state are culled;
existing dealerships face a new ~~automotive~~ future

By GREG LAMM
STAFF WRITER

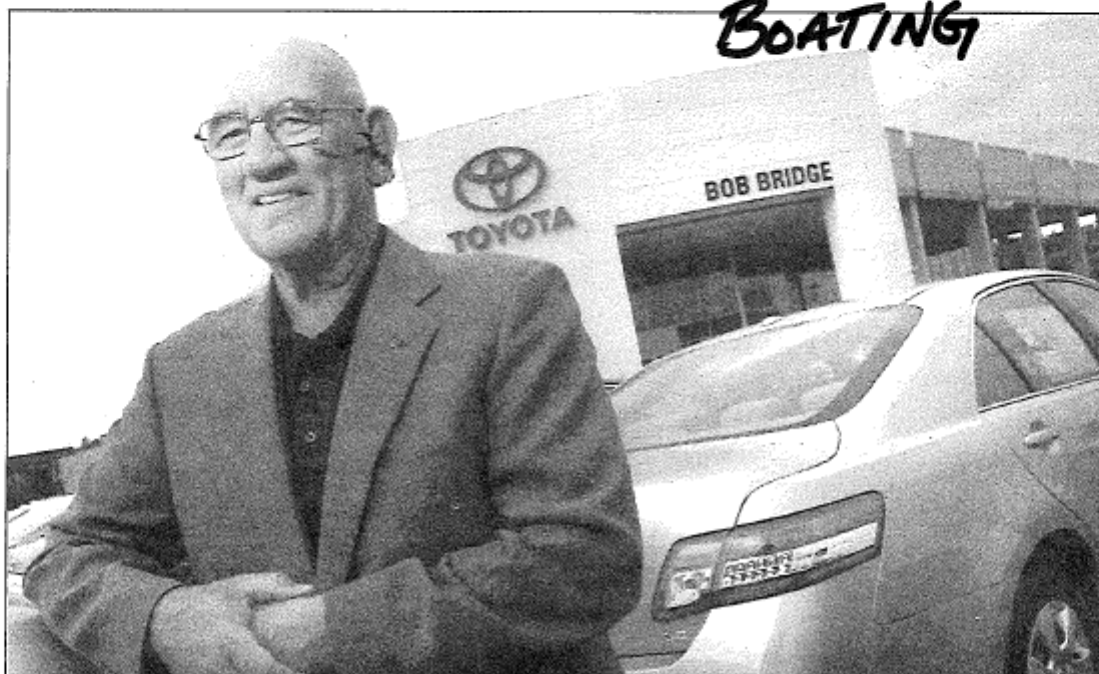
In 2007, Bob Bridge's car dealership in Renton raked in nearly \$85 million in sales during an economic boom fueled by a housing bubble that had consumers feeling flush and eager to make big-ticket purchases like new Toyotas.

This year, Bob Bridge Toyota Scion is on track to wind up with about \$60 million in sales, a \$25 million drop-off.

"Call it the super recession or the Great Recession, or whatever you want. It wasn't a depression, but it was sure worse than any old recession," Bridge said.

"It's the new normal."

That new normal means dealing with annual sales that are 30 percent less than in pre-



about \$150,000 to \$200,000 on new equipment such as high-tech diagnostic machines that allow technicians to plug a car into a computer and identify problem areas.

Some dealers also saw opportunities during the recession.

One was Jim Walen, who owns a Kirkland dealership that sells Ford and Hyundai vehicles.

In 2005, Walen sold his minority interest in a Portland dealership and moved to Kirkland to buy a Ford dealership.

In March 2009, he bought the Eastside Hyundai dealership in Kirkland, which was part of the former Rainier Automotive Group, an apparent victim of the recession that sold its dealerships in Auburn, Burien and Kirkland.



Closed Dealers & Brokers

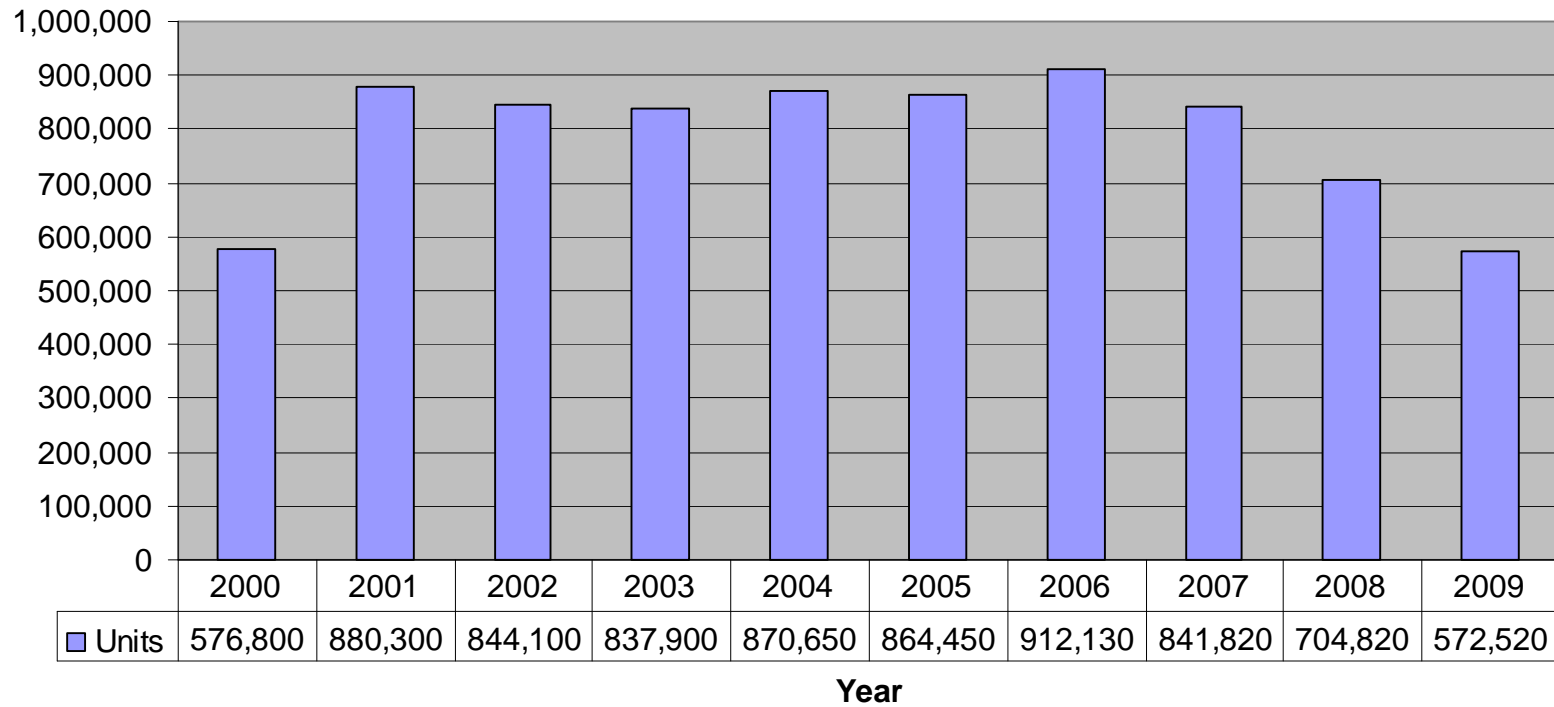
Adventure Yachts
Blackfish Marine (2)
Boater's World (5)
Bob Lamphere's
Boondocks Boats & Motors
Cope & McPheters (3)
Dahl's Watersports
Dick Sproul Yacht Sales
Frasier Yachts
Glacier Bay
I-90 Marine Center
Inflatable Boatworks

North River Marine (3)
Olympic Boat Centers (21)
Oviatt Marine
Pacific Power Cats
Passage Maker Yachts
Powerboats Northwest
Ray Rairdon Yacht Sales
Sea Sport
Ski Dog Sports
Sport Boat Northwest
Venwest



U.S. New Boat Sales - Units

Source: NMMA 2010



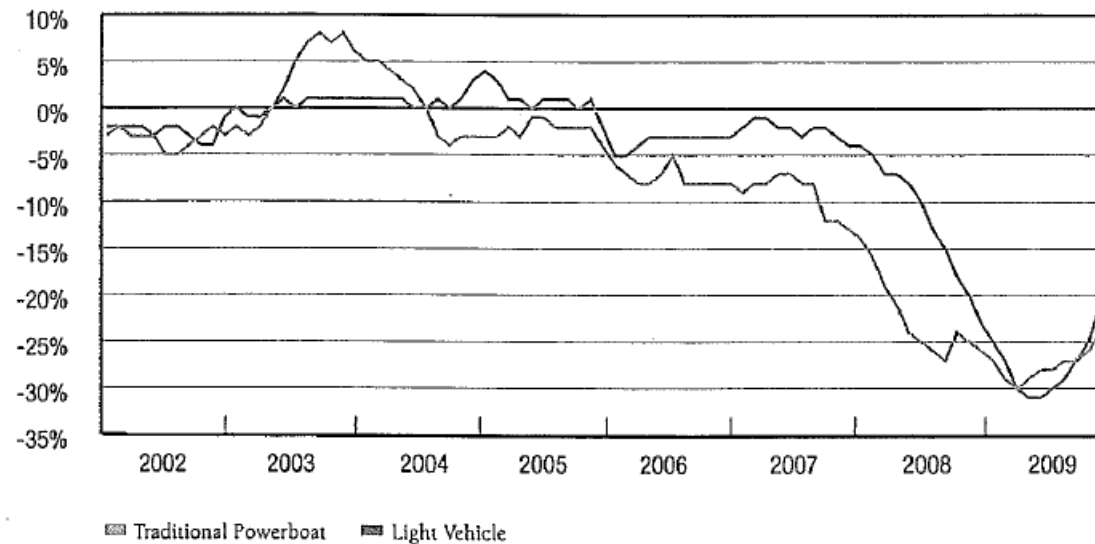


2.2c Retail sales: Traditional powerboats vs. light vehicles

New car and light truck sales totaled 10.4 million in 2009, a near 30-year low, and were down 21% on a rolling 12-month basis compared to 2008. Traditional powerboat sales were down 24%.

SOURCE: NMMA, MSR, RVIA

CHART 2.2c





Washington State 1st Quarter - 2010



Boat Sales Activity
Washington State
1st Quarter - 2010



Source of Sales	2010						2009		2009-2010 Comparison					
	January		February		March		1st Quarter Total		1st Quarter Total		1st Quarter Change			
	Units	\$	Units	\$	Units	\$	Units	\$	Units	\$	Units	%	\$	%
New Dealer	72	\$5,087,917	145	\$4,940,169	246	\$12,980,480	463	\$23,008,566	390	\$17,897,981	73	18.7%	5,110,586	28.6%
New Import *	45	\$2,231,386	55	\$902,260	100	\$3,075,218	200	\$6,208,864	235	\$7,933,345	-35	-14.9%	-1,724,480	-21.7%
Used Dealer	108	\$3,354,736	123	\$3,401,045	257	\$7,755,693	488	\$14,511,474	367	\$8,243,237	121	33.0%	6,268,236	76.0%
Used Dealer Import	33	\$2,484,439	63	\$1,502,258	142	\$7,256,110	238	\$11,242,807	149	\$9,003,047	89	59.7%	2,239,760	24.9%
Used Private	805	\$5,437,299	1,116	\$5,056,649	1,892	\$6,394,131	3,813	\$16,888,078	2,967	\$14,535,693	846	28.5%	2,352,385	16.2%
Used Import **	246	\$2,083,095	343	\$4,542,713	566	\$6,692,347	1,155	\$13,318,155	898	\$11,088,089	257	28.6%	2,230,066	20.1%
Total	1,309	\$20,678,873	1,845	\$20,345,094	3,203	\$44,153,978	6,357	\$85,177,945	5,006	\$68,701,392	1,351	27.0%	16,476,553	24.0%

* Current WA resident registers a new boat from an out of state dealer.

** Current WA resident registers used boat purchased from out of state.

Source: Washington Department of Licensing and Washington Sea Grant Program



1st Quarter - 2010

2009-2010 Comparison			
1st Quarter Change			
Units	%	\$	%
73	18.7%	5,110,586	28.6%
-35	-14.9%	-1,724,480	-21.7%
121	33.0%	6,268,236	76.0%
89	59.7%	2,239,760	24.9%
846	28.5%	2,352,385	16.2%
257	28.6%	2,230,066	20.1%
1,351	27.0%	16,476,553	24.0%

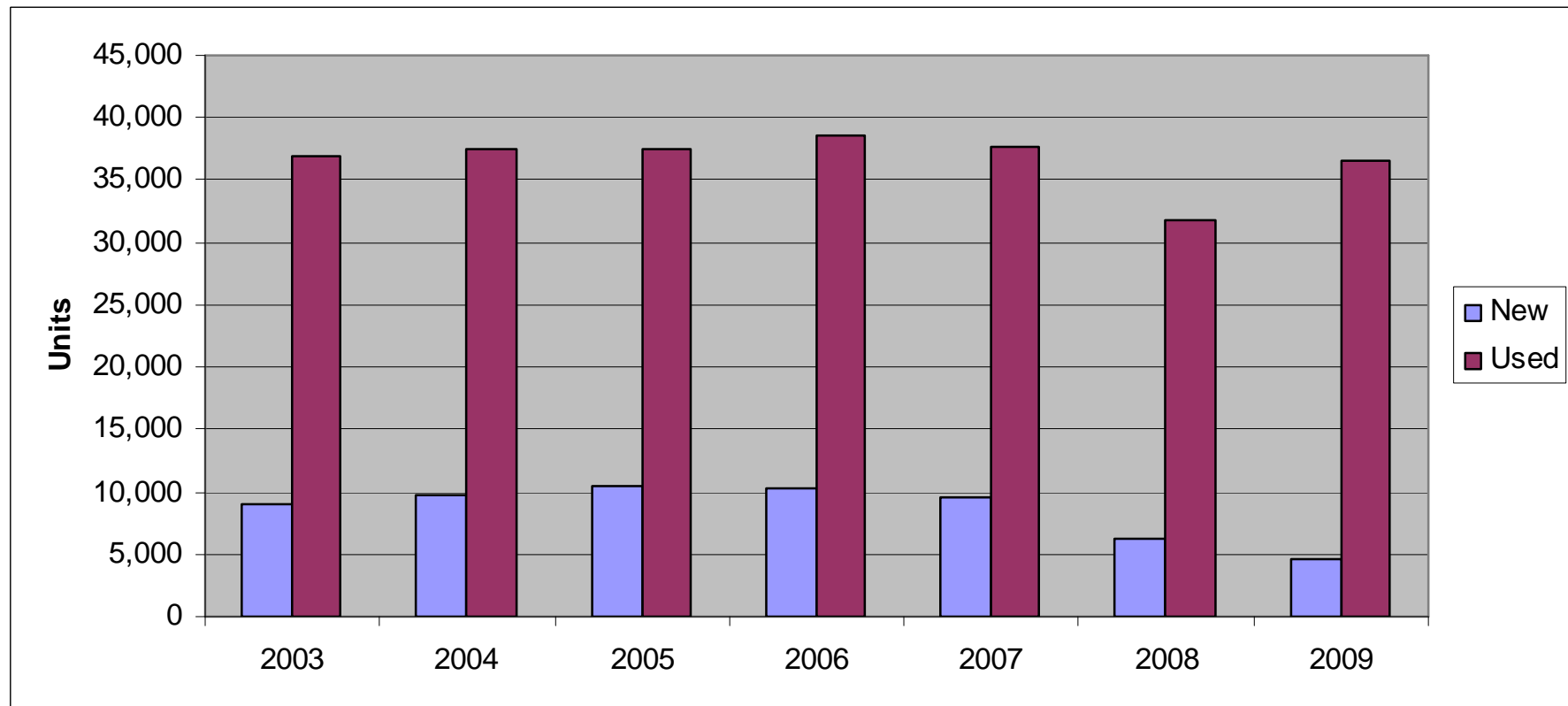


2nd Quarter - 2010

Source of Sales	2009 & 2010 Comparison			
	2nd Quarter Change			
	Units	%	\$	%
New Dealer	-540	-42.0%	-22,402,705	-44.8%
New Import *	-150	-27.1%	-8,886,939	-42.6%
Used Dealer	-50	-5.6%	2,126,748	9.6%
Used Dealer Import	4	1.0%	611,151	4.2%
Used Private	-1,173	-12.4%	-1,384,508	-4.8%
Used Import **	-172	-6.4%	3,496,353	18.9%
Total	-2,081	-13.6%	-\$26,439,900	-17.1%



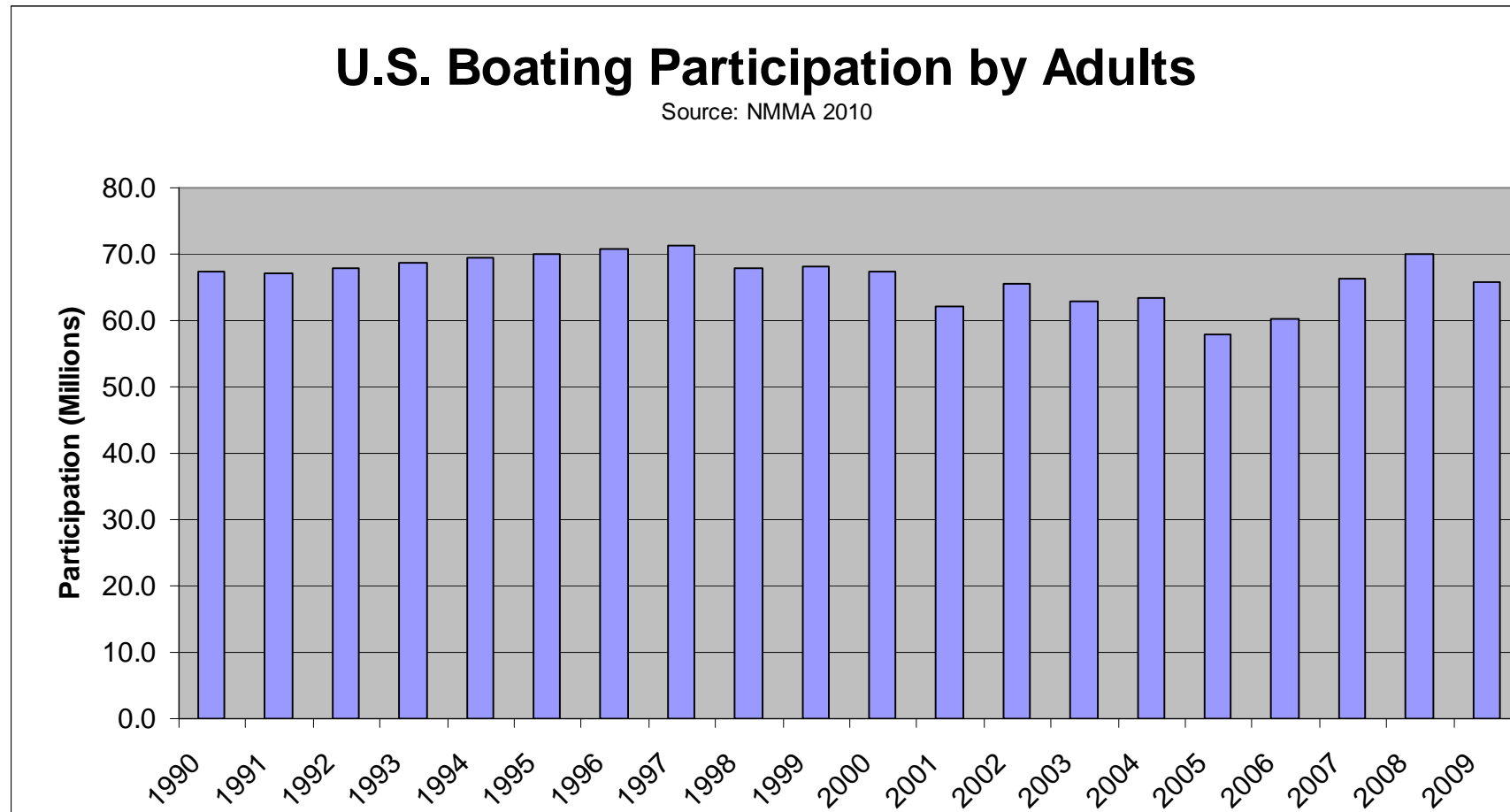
Washington New & Used Vessel Sales





U.S. Boating Participation by Adults

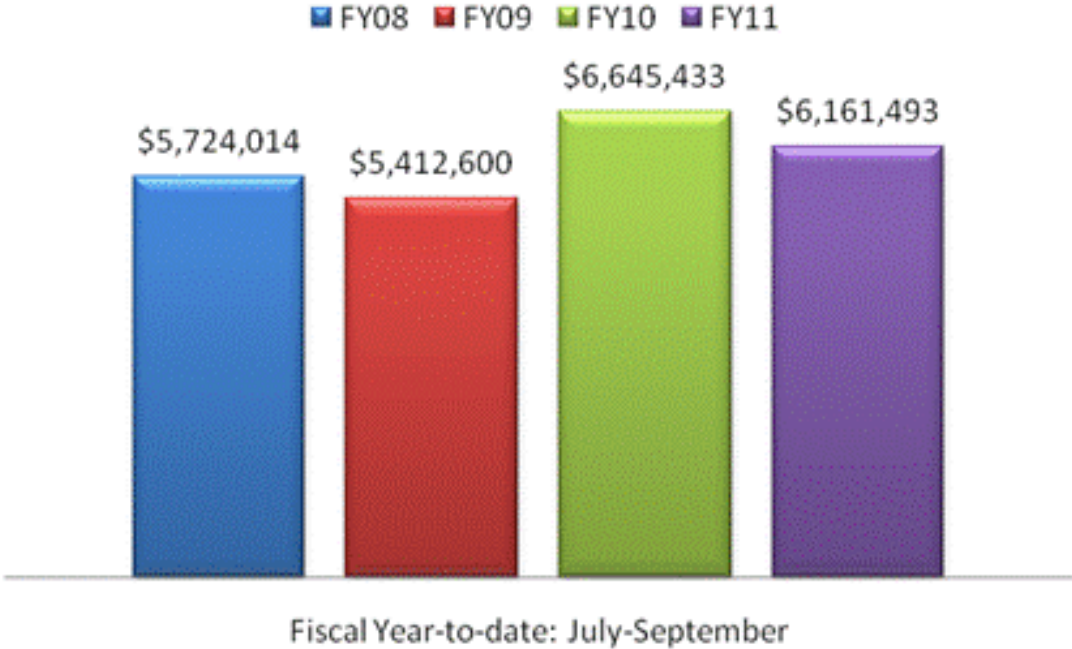
Source: NMMA 2010





Fishing License Sales

Fishing Sales Comparison: Fiscal Year-to-Date





Boat Shows





Fewer and Smaller Boat Shows

- Tacoma Boat Show - cancelled
- Everett Boat Show - cancelled
- Vancouver Boat Show (2010) – postponed
- Portland Boat Show – shortened
- Los Angeles Boat Show - shortened

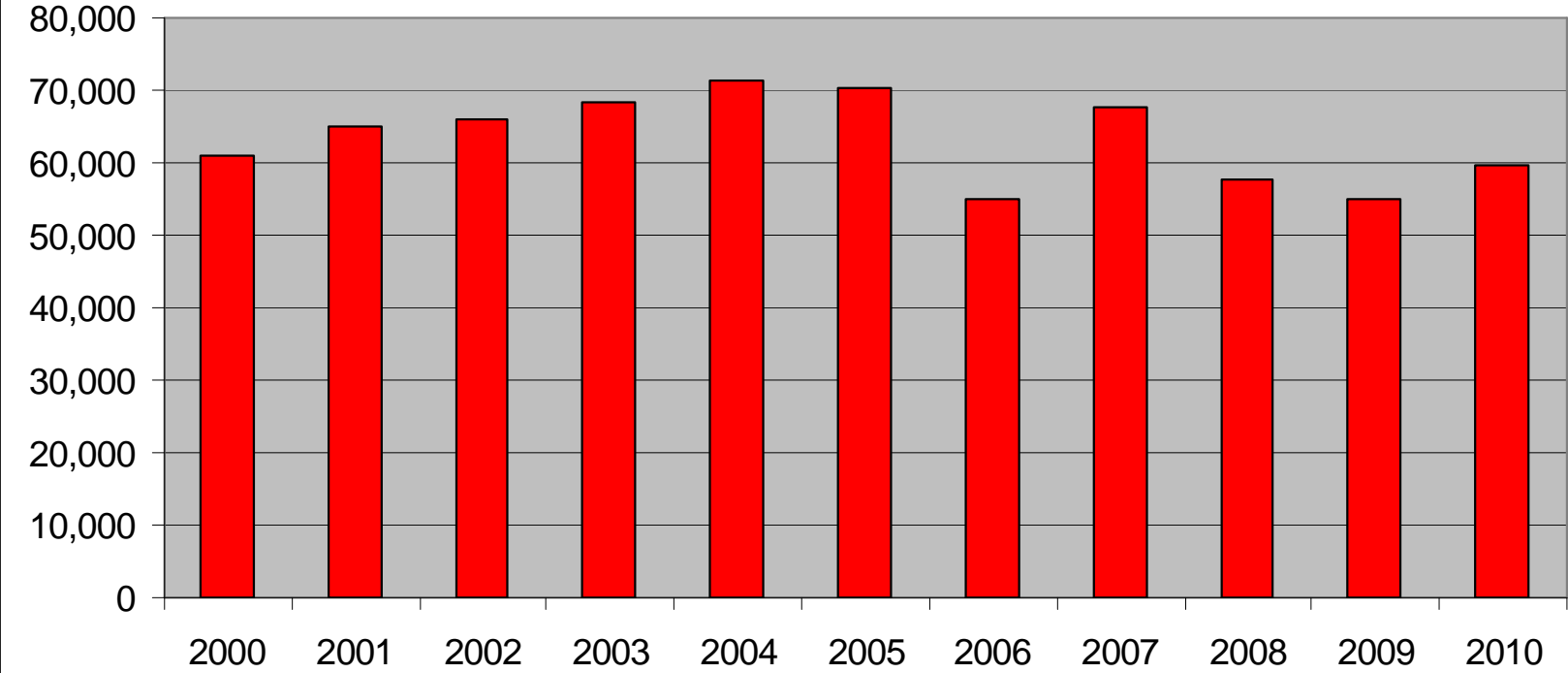


Seattle Boat Show

- Seattle Boat Show 2010 sold tickets in 41 states and 6 provinces
- Seattle Boat Show was one of 6 North American Shows with a 2010 attendance increase +9% 59,526

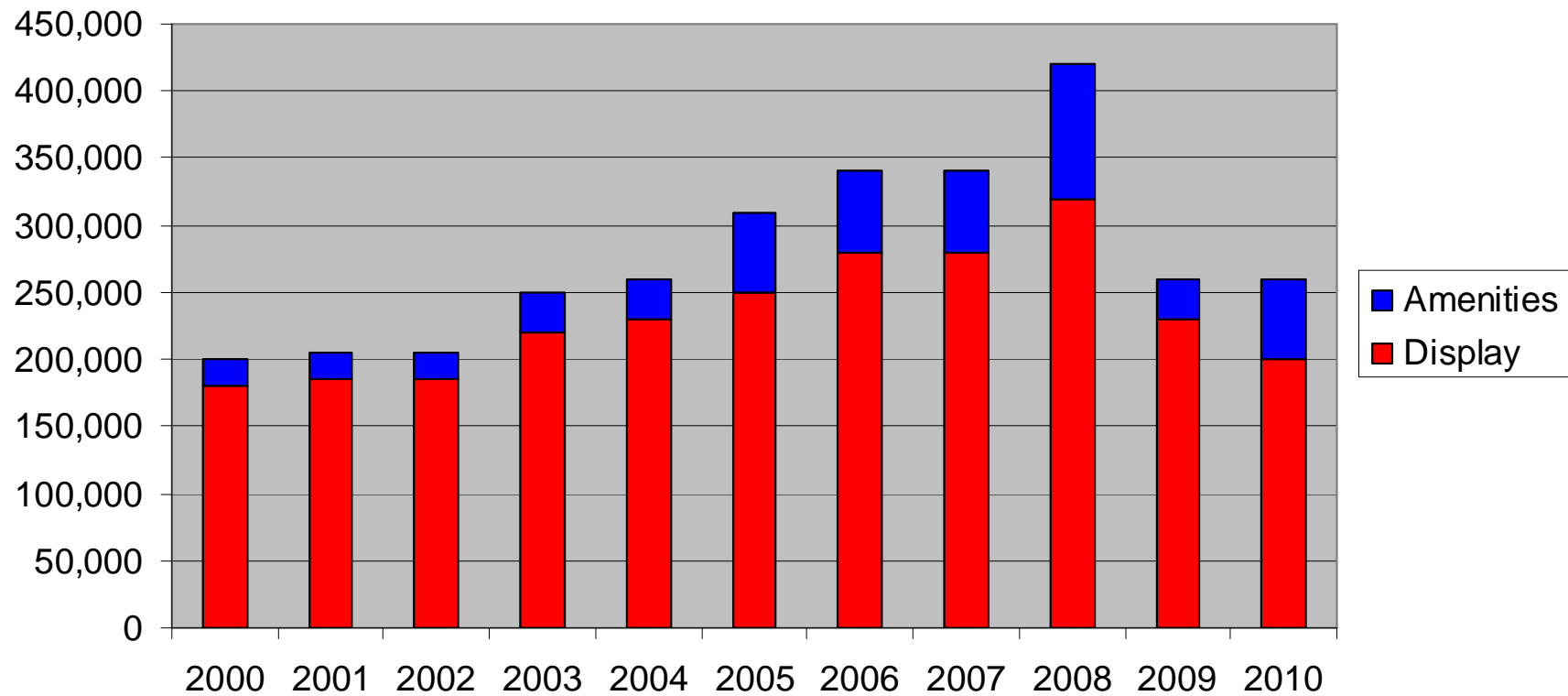


Seattle Boat Show Attendance





Seattle Boat Show - Space Rental





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Boatyards





Boatyards

- PSA Enforcement December 2009



Boatyards

- PSA Enforcement December 2009
- Facilitated meetings with PSA & NMTA at Ruckelshaus Center



Boatyards

- PSA Enforcement December 2009
- Facilitated meetings with PSA & NMTA at Ruckelshaus Center
 - Clean Boatyard Program
 - Non-Copper Bottom Paint Study
 - Financial Assistance for Boatyards



Boatyards

- PSA Enforcement December 2009
- Facilitated meetings with PSA & NMTA at Ruckelshaus Center
 - Clean Boatyard Program
 - Non-Copper Bottom Paint Study
 - Financial Assistance for Boatyards
- Boatyard Permit



NMTA Annual Meeting

- Wednesday, December 8
- 6:00 – 9:00 p.m.
- MOHAI, Seattle
- Guest Speaker, AG Rob McKenna