Industry Overview

Reports indicate increasing sales, but an increase has not been felt by everyone...
Industry Overview...

Weather conditions were a factor for dealers during this year’s summer selling season. Some regions in the U. S. experienced rain, while other parts of the nation continue to deal with low lake levels and warm weather. Dealers surveyed about the relative strength or weakness of the summer selling season offered a mixed response. 41% of respondents reported a flat selling season, 37% of respondents replied that it has been a strong selling season and 22% reported a weak selling season.

According the NMMA New Powerboat Registrations Report, “retail sales estimates for traditional powerboat were up 4.3%” (NMMA Economic Overview, August 2013) in Q1 based on a rolling 12 month, year over year analysis. As we approach the end of the 2013 summer selling season, dealers are reporting that sales are starting to pick back up, but not enough to make up for the lost sales due to the bad weather conditions experienced in late spring and summer.

Figure 1.1

This graph represents the percentage of responding dealers with their opinion of the 2013 Summer selling season based on their sales in the last 60 days.

Source: NADAguides, Inc.
Dealers surveyed were asked how many new and used units were on their lot. We compared the responses to the same question asked last year. Based on total number of units submitted, responses indicate that dealers had more new boats on their lots in both 2012 and 2013, as compared to used boats, during the survey period. Slight year over year differences indicate that new boat inventory has decreased on dealer lots; while used boat inventory has increased for 2013. This data is supported by conversations with dealers indicating that used units are still in high demand.

Figure 1.2
NADAguides Data Overview
Data Overview...

Average Trade-In
The surveyed dealers weighed in on the values.

The chart shown in Figure 1.3 will reflect the Boat Type, based on if the trade-in values were too low, about right, or too high as compared to their local market area.

![Trade-In Values in the NADAguides Data](chart)

This chart reflects where responding members felt the NADAguides data within each segment fell with respect to their local market areas.

Source: NADAguides, Inc.

Figure 1.3
**Data Overview...**

**Average Retail**
The chart shown in Figure 1.4 will reflect, the Boat Type, where the Average Retail values were too low, about right, or too high as compared to their local market area.

![Average Retail Values in the NADA Marine Guide](chart)

*This chart reflects where responding members felt the NADAguides data within each segment fell with respect to their local market areas.*

Source: NADAguides, Inc.

Figure 1.4

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Data Overview...

**High Retail**
The chart shown in Figure 1.5 will reflect, the Boat Type, where the Average Retail values were too low, about right, or too high as compared to their local market area.

Figure 1.5

This chart reflects where responding members felt the NADAguides data within each segment fell with respect to their local market areas.

Source: NADAguides, Inc.

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Data Overview...

**Outboard Motors by Type**
The chart shown in Figure 1.6 will reflect, the Type of Outboard Motors; where the Trade-In, Average and High Retail values were too low, about right, or too high as compared to their local market area.

This chart reflects where responding members felt the NADAguides data within each segment fell with respect to their local market areas.

Source: NADAguides, Inc.
Data Overview...

*Outboard Motors by Strokes*

The chart shown in Figure 1.7 will reflect, the Outboard Motors by Strokes; where the Trade-In, Average and High Retail values were too low, about right, or too high as compared to their local market area.

![Outboard Motor by Strokes Chart](chart.png)

This chart reflects where responding members felt the NADAguides data within each segment fell with respect to their local market areas.

Source: NADAguides, Inc.
Outside Influences
Fuel Prices

A view of the national average gas price and regional YoY change over the last year, is supplied to provide support to longer-term strategic planning.
Economic Drivers

Economic Factors: Two of the most important factors affecting the marine industry today are the unemployment rate and consumer confidence. These factors can be interpreted to represent the consumer’s ability and willingness to make a new or used boat purchase.
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