

Sailing Market Demographics

US Sailing Membership Demographics (as of 2010):

Total Membership: 42,000 individuals
1,500 organizations

Average Age:

18-25	3%
26-35	7%
36-50	34%
51-60	30%
61 +	26%

Average Annual Household Income:

Over \$125,000	70%
Over \$225,000	19.5%

Boat Ownership:

At least 1 boat	87%
2 or more boats	57%

- Sailors rank 1st in the following categories:
 - Owning a \$50,000+ vehicle
 - Spending \$5,000 on jewelry
 - Traveling 1st class
 - Having assets of \$2.0+ million

Yacht Clubs

- Approximately 1300 Yacht Clubs in the United States
- 63% are year round yacht clubs while 37% are seasonal.
- 82% of surveyed clubs report their membership is either increasing or stable and that 73% said their racing participation is either increasing or stable.
- Average yacht club membership has
 - 52% daysailing or cruising (sailing)
 - 48% racing sailboats
 - 15% power boats
 - 15% social
- Yacht club membership in the last 3 years has
 - Grown 23% in individual membership
 - Grown 24% in family membership
 - Grown 21% in junior membership
- Nearly all (98%) use e-mail as a means to communicate with members. Slightly less (89%) use a Web site while over two-thirds (70%) use newsletters to do the same.
- Of those organizations whom used social networking to maintain contact with their members, Facebook (84%) was the site used most.
- The most desired services include programs, lectures and / or talks by outside speakers followed by sailing instruction for youth then safety education.

- 32% of yacht clubs polled use Gowrie insurance “The Burgee Program” (which means more room for growth!)
- Insurance through the Gowrie “Burgue Program” ranked as second most valuable benefit to yacht clubs
- 350 High School Sailing Programs
- 190 Varsity Programs at the College Level

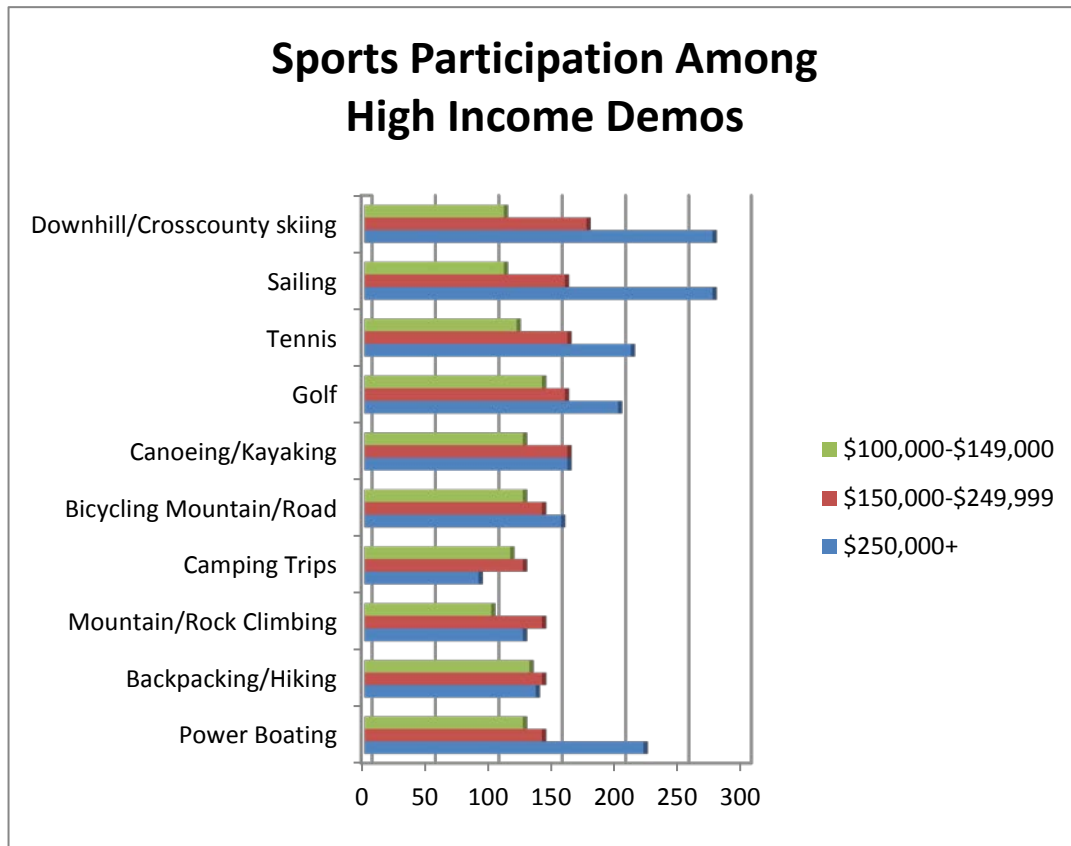
Membership Duration: 55% have been US Sailing members for 10+ years. Only 16% have been a member for 3 years or less.

Source: *US Sailing 2006 Membership Survey, US Sailing 2010 Yacht Club Membership Survey*

Aggregated Sailing Demographics:

- 3,570,000 million sailing participants
- 897,000 people sailed 15 or more times annually
- 59% of all Sailing participants are male and 61% of frequent (15+/year) Sailing participants are male.
- 64% of all Sailing participants are 35 years old and over; 74% of frequent (15+/year) Sailing participants are 35 and over.
- 52% of all Sailing participants have a college degree or higher.
- 400-500K sailboat owners

Source: *National Marine Manufacturer Association, Sail America, US Sailing, The Sailing Company, and the Sporting Goods Manufacturing Association*



Research conducted in spring 2008, supplied by marketing agency Sage Collective, shows the level of interest that affluent consumers have in participation in various sport and recreational activities. To read: Par=100. For example, people earning \$250,000 or more each year are 170 times more likely than the consumer average to have gone sailing in the past 12 months, whereas the same demo is 13 percent less likely to have gone camping

Note: Research involved a written survey. Sample sizes were as follows:

\$100K-149K = 3,881

\$150K-249K = 2,495

\$250K+ = 1,323

General U.S. pop. 18+ = 24,581

Source: *Sage Collective/Simmond Spring 2008*

Manufacturing:

Estimated Number of Existing Sailboats in the US

Size Range	% Built 1988-2005	<u>Estimated # Existing Units</u>
0' to 19'	72.80%	1128400
20' to 29'	13.40%	207700
30'-35'	6.70%	103850
36'-40'	4.10%	63550
41-45'	2.00%	31000
46'-59'	0.70%	10850
60'+	0.20%	3100
Total		1,548,450

- 14,158 total sailboats manufactured in North America per year which creates annual revenue of \$719 million.
- There are 139 North American Manufactures that produce sailboats, which employ 3200 workers.

Source: *Sailing Company Industry Study, National Marine Manufacturers Association Study*

Charter Boat Demographics:

- There are 3,105 charter boats (North American Companies). Average number of boats in a charter fleet is 51.
- 27,213 charter weeks are booked each year. Estimated value is \$75,000,000

Source: *The Sailing Company Industry Study*

Sailing Magazine Subscriber Comparisons:

	Subscriber Study Comparisons		
	Sailing World	Cruising World	SW/CW Combo
PERSONAL FINANCES			
Median Net Worth:	\$986,000	\$963,000	\$969,000
Average Net Worth:	\$2,006,000	\$1,905,000	\$1,932,000
Median HHI:	\$150,000	\$136,000	\$140,000
Avg. HHI:	\$282,000	\$227,000	\$242,000

BOAT OWNERSHIP

% Who Own a Boat:	89.30%	81.20%	83.10%
Average # Boats Owned	3.2	2.9	3
Total # Boats Owned	140,854	343,864	487,135
Of Those Owning a Boat, % Who Own an Aux. Sailboat:	62.80%	82%	77%
# Auxiliary Sailboat Owners	27,643	97,286	125,031

Source(s): *2008 CW & SW Subscriber Study MMR; 2007 Sail Subscriber Study Beta Research*

Circulation As of 12/07 ABC Statements

Cruising World	146,110
Sailing World	49,291
CW/SW Combo	195,401
Sail	165,757

Source: *Cruising World/Sailing World 2008 Subscriber Studies, Monroe Mendelson Research*