

Emergency Stop Lanyards (ESLs) on Recreational Boats

2011 Survey Results to Supplement NMMA response to U.S. Coast Guard Docket No.
USCG -2009-0206, RIN 1625-AB34

Table of Contents	2
Introduction	3
Methodology	3
Highlights	3
Data Tables	5
Participants	6

Introduction

An online survey of NMMA member boat manufacturers was conducted by the NMMA Department of Industry Statistics and Research to better understand the prevalence of Emergency Stop Lanyards (ESL's) within the existing recreational powerboat fleet in response to the U.S. Coast Guard's Advanced Notice of Proposed Rulemaking around this component.

Objective

The objective of this survey was to gauge the prevalence of ESLs in traditional powerboats less than 27', (excluding PWCs) and to sample manufacturers' reaction to a Coast Guard mandate on ESL's.

Methodology

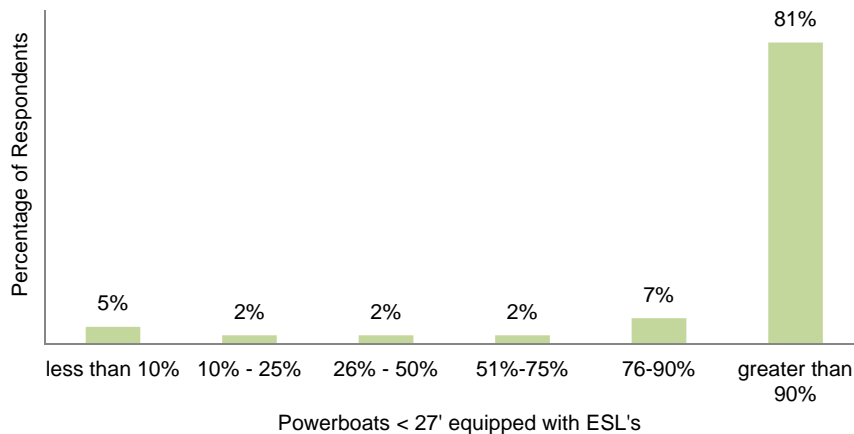
61 NMMA member chief executives were surveyed from August 4, 2011 – August 22, 2011. Collectively, they represent approximately half of the U.S. market in this category, based on new retail sales market shared on a rolling twelve month basis through March, 2011 (the latest data available.) Survey results have a confidence interval of $\pm 15\%$ at the 95% confidence level.

Highlights

- Over 4 in 5 manufacturers of powerboats less than 27' already equip the majority (over 90%) of their boats with ESL's.

2010 U.S. PRODUCTION

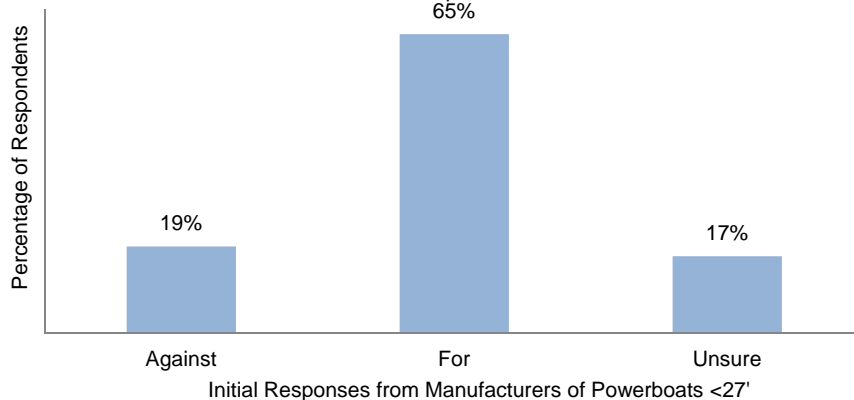
Total Respondents: 43



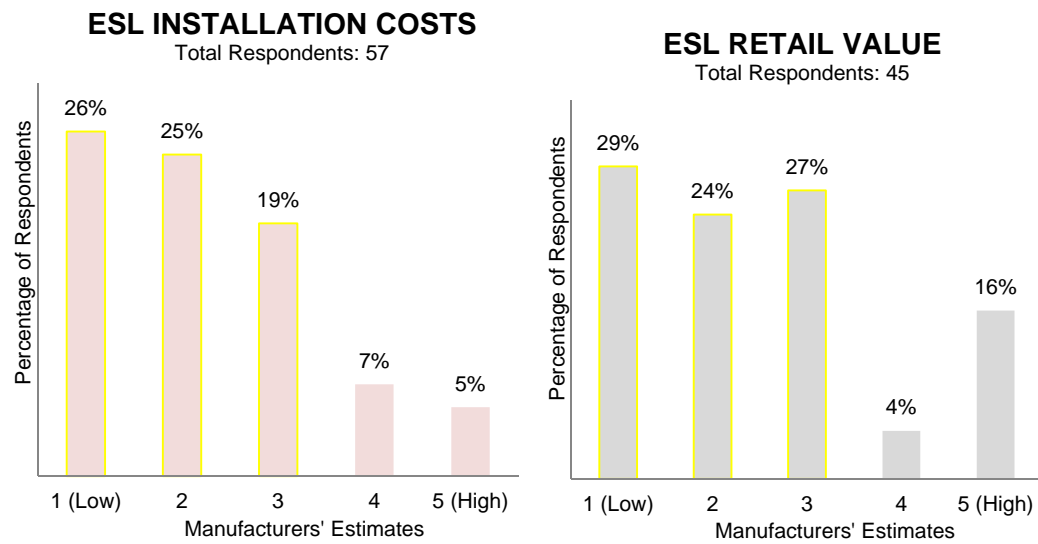
- More than 3 in 5 manufacturers in this category support a Coast Guard mandate on ESL's.

POSITION ON ESL MANDATE

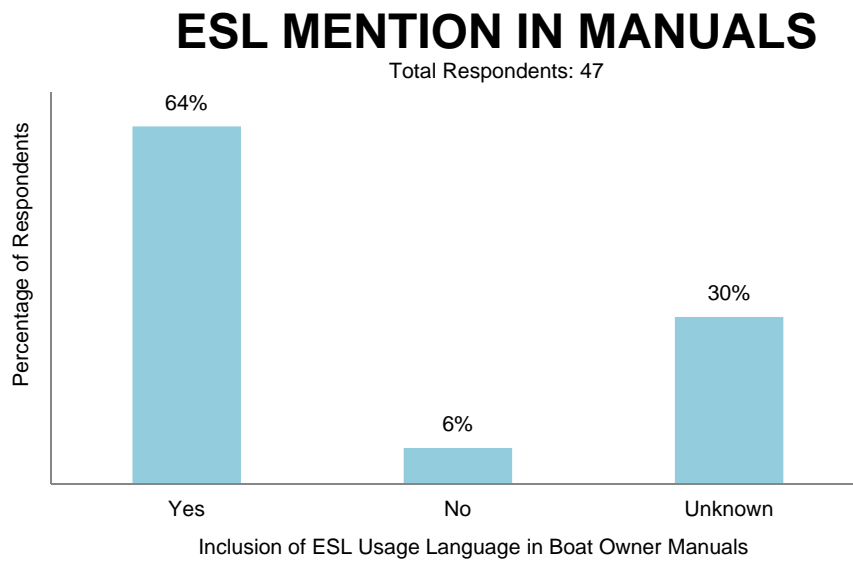
Total Respondents: 48
65%



- The majority (70% - 80%) of manufacturers consider ESL installation as having low to moderate cost and low to moderate retail value.



- More than 3 in 5 manufacturers have ESL usage language in their current boat owner manuals.



Data Tables

What percentage of your calendar year 2010 production of powerboats less than 27' was equipped with ESLs (emergency stop lanyards)?

	N=	
	43	70%
less than 10%	2	5%
10% - 25%	1	2%
26% - 50%	1	2%
51%-75%	1	2%
76-90%	3	7%
greater than 90%	35	81%
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<i>Do not manufacture powerboats less than 27'</i>	14	23%
<i>Unknown</i>	4	7%

Which types of boats in your 2010 production do not have ESL installed currently?

	N=	
	39	100%
Cabin Cruisers	13	33%
Deck Boats	0	0%
Fishing Boats	6	15%
Jet Boats	0	0%
Pontoons	2	5%
Runabouts	2	5%
Unknown	14	36%
Other	2	5%
<i>Boats not without motors</i>	1	3%
<i>walk around pilot house boat</i>	1	3%

As of today, what is your position on a Coast Guard mandate on ESL installation in boats less than 27'?

	N=	
	48	80%
Against	9	19%
For	31	65%
Unsure	8	17%
<hr/>		
<i>Not Applicable, Do not manufacture boats less than 27'</i>	12	20%

Please rate the installation of ESLs in boats less than 27' along the following parameters.

Manufacturing Costs

	N=	
	57	82%
1 (Low)	15	26%
2	14	25%
3	11	19%
4	4	7%
5 (High)	3	5%
<hr/>		
<i>N/A</i>	10	18%

Retail Value

	N=	
	45	79%
1 (Low)	13	29%
2	11	24%
3	12	27%
4	2	4%
5 (High)	7	16%
<hr/>		
<i>N/A</i>	12	21%

Do you include ESL usage language in at least some of your current boat owner manuals?

	N=	
	47	82%
Yes	30	64%
No, at least some of the boats I manufacture are equipped with ESLs	3	6%
Unknown	14	30%
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No, none of the boats I manufacture are equipped with ESLs	10	18%

SURVEY PARTICIPANTS

AB Inflatables
Achilles Inflatable Craft
Alumacraft Boat Co.
American Marine Holdings, Inc.
Azure Sport Boats
Beneteau USA, Inc.
Bertram Yachts
Big River Outfitters DBA Sea Ark Boats
Bluewater Sportfishing Boats
Brunswick Corporation
Bryant Boats, Inc.
Carolina Skiff, LLC
Chaparral Boats, Inc.
Chris-Craft Corp.
Coleman Company, The
Crest Marine LLC
Cruisers Yachts Div. KCS International, Inc.
Dave's Custom Boats
Ebbtide Corp.
EdgeWater Power Boats
Everglades Boats
Fleming Yachts Construction (HK) Ltd.
Four Winns, LLC
Gibbs Technologies, Inc.
Glacier Bay Catamarans, LLC
Godfrey Marine
Grady-White Boats, Inc.
Gull Manufacturing Company
Hewes Boats
High Road International USA LLC
Hobie Cat Company
Hornet Marine
Hunt Yachts, Inc.
International Leisure Products, Promarine Division
Island Packet Yachts
Malibu Boats
Marquis Yachts, LLC
MasterCraft Boat Company
MJM Yachts, LLC
Nordic Tugs, Inc.
Northport Corporation of St. Cloud
Premier Marine, Inc.
Ranger Boats
Regulator Marine, Inc.
Rolling Boat, Inc.
S2 Yachts
Scopinich Fighting Chairs, Inc.
Scout Boats, Inc.
SeaHunter Inc.
Seminole Marine
Silverton Marine Corp.
Stamas Yacht, Inc.
Stingray Boat Company
Thunderbird/Formula
Tideline Boats, Inc.
Tracker Marine, LLC
Walker Bay Boats, Inc.
Win Marine Ventures LLC
Windsor Craft Yachts, LLC
Yar-Craft Boats Inc.
Zodiac of North America