

MARKET EXPANSION ACCELERATION

NMMA & MRAA Member Webinar

1/27/26

***Presented by Members of the
Market Expansion Advisory Group:***

- *Abbey Heimensen, MarineMax*
- *Bryan Seti, Yamaha*
- *Thomas Bates, Correct Craft*

AGENDA

INDUSTRY – CURRENT STATE

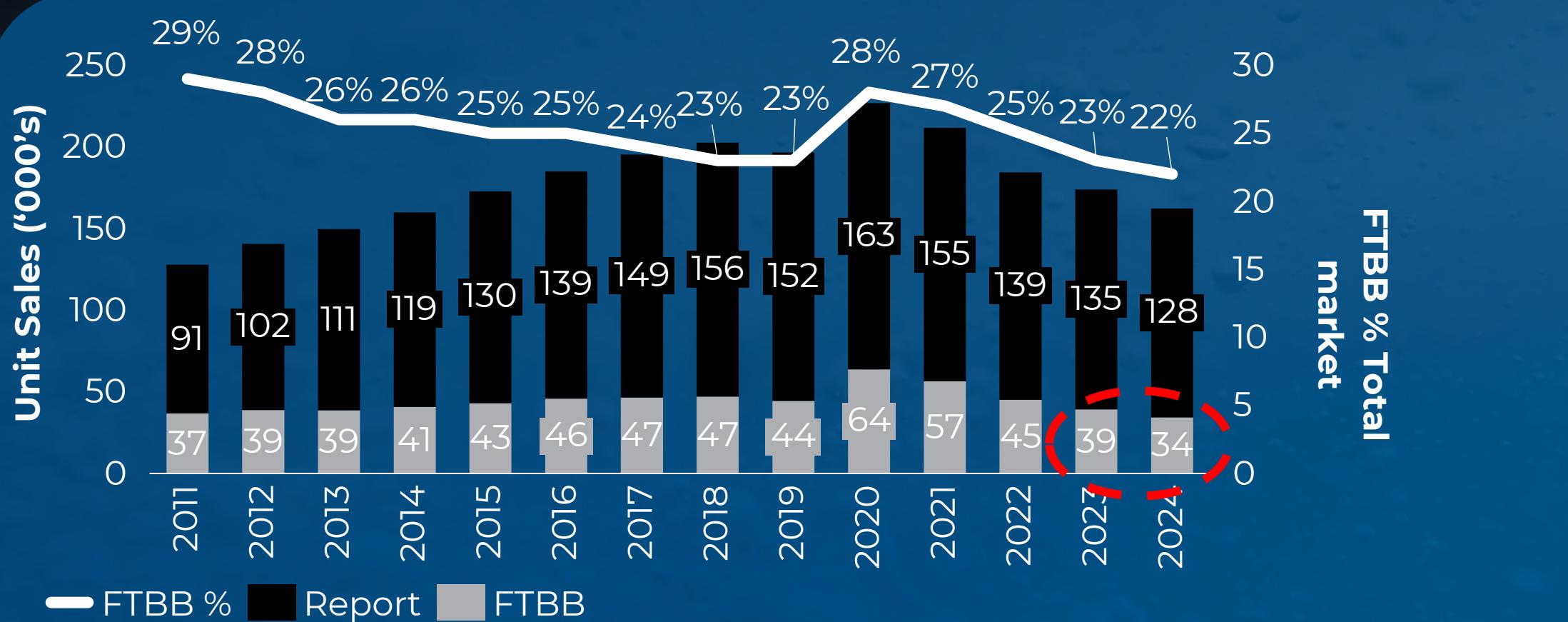
DISCOVER BOATING – CURRENT STATE

OUR SOLUTIONS TO SUCCESS

HOW WE MEASURE SUCCESS

INDUSTRY – CURRENT STATE

FIRST TIME BOAT BUYERS (NEW BOATS)



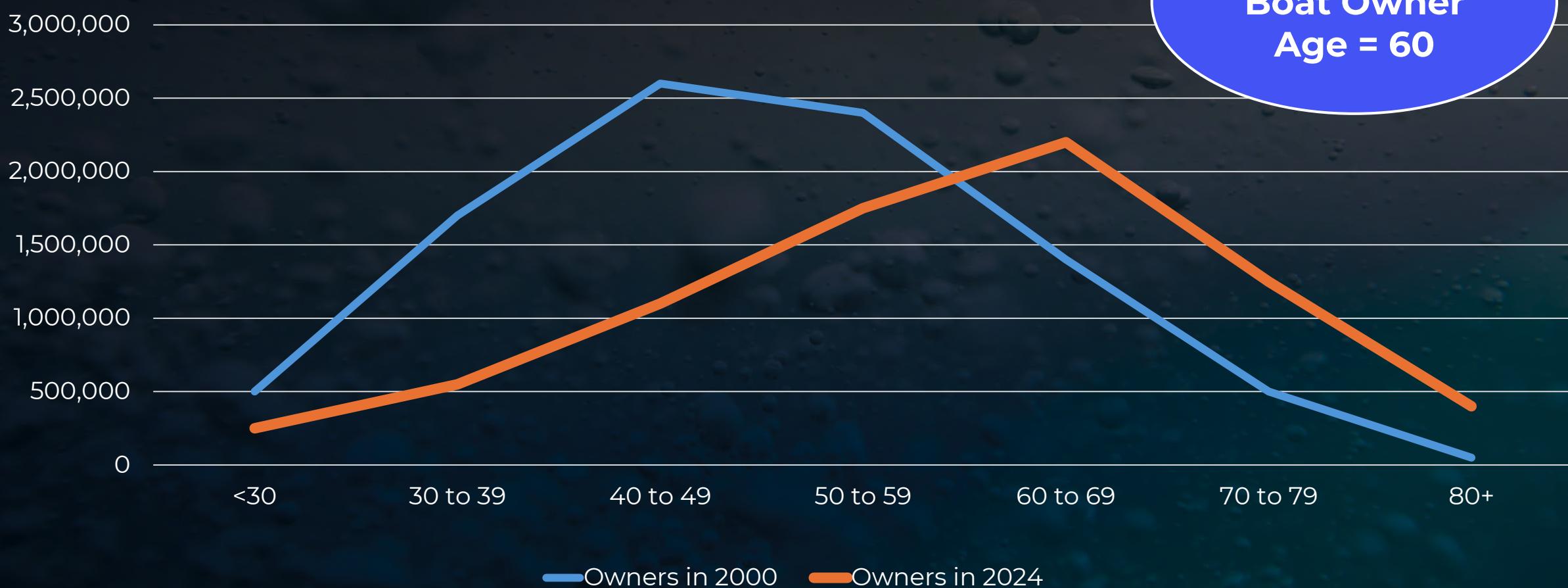
Existing boaters -5%, FTBB's -9%. No notable change in FTBB's post-COVID trading activity.

Source: Info-Link

MEDIAN BOAT OWNER HIT AGE 60 FOR FIRST TIME

Buyer Age Distribution: Owners in 2000 vs. 2024

2024 Median
Boat Owner
Age = 60



WHY WE'RE HERE AND WHAT WE WERE ASKED TO ACCOMPLISH

WHY:

Strategic Planning research revealed members need more from Discover Boating amid declining unit sales

WHAT:

1. Determine **How to Measure Success** for Discover Boating
2. Determine **How to Achieve That Success**



Success means reaching more people
who could become boaters and inspiring
them to engage with boating – all
measured with a **Health Score**

ADVISORY GROUP SUPPORTING THIS EFFORT



THOMAS BATES
Correct Craft
CRO



LAUREN BECKSTEDT
Brunswick
CMO



BRYCE BROWN
Colorado Water Sports
Principal



VICTOR GONZALEZ
Sportsman Boats
CMO



ABBEY HEIMENSEN
MarineMax
VP Marketing



AMBER HOLM
Winnebago Industries
CMEO



BRYAN SETI
Yamaha
Vice President



MATT GRUHN
MRAA
President

DISCOVER BOATING – CURRENT STATE

WE ALIGNED ON WHAT DISCOVER BOATING IS AND ISN'T

DISCOVER BOATING IS A MOVEMENT

Discover Boating ISN'T



Reach, Inspire New Boaters



Funnel Activation & Support



Market Impact



 A lead generator or immediate sales driver



Change the story, spark the desire



Guide the journey, fuel the funnel



Grow the pie, an engine for lasting growth

CONSUMER & MARKETING SHIFTS IMPACTING GROWTH



Shrinking Customer Buying Power

Outboard Prices +290% vs. 21% Median Income



As Boaters Age, Consumers Get Younger

30% of New Boat Buyers Age 61-75 vs. 11% Pop.



Boat Ownership Interest Declining Since 2010

Google Searches -40%



Consumers Choosing Access vs. Ownership

Boat Club Locations Grew 350% b/n 2010-2025 with 110K Members



Content Creators Increasingly Own Relevance

25,000 TIMES More Hours of Content on YouTube vs. ALL TV/ Streaming



Media Fragmentation & Costs Skyrocket

Digital Prices +120% vs. 2019
Auto Buyers Avg. 62 Marketing Touchpoints

KEY ISSUES LIMITING DISCOVER BOATING SUCCESS

KEY ISSUES

CURRENT CHALLENGE

Overly Broad Spend

Measurement Gap

Marketing Funnel Gaps

Spreading resources too thin, trying to be everything to everyone

Unclear metrics and KPIs prevent understanding of success

Lack of clarity on role is creating industry marketing gaps, limiting growth

INDUSTRY MARKETING FUNNEL

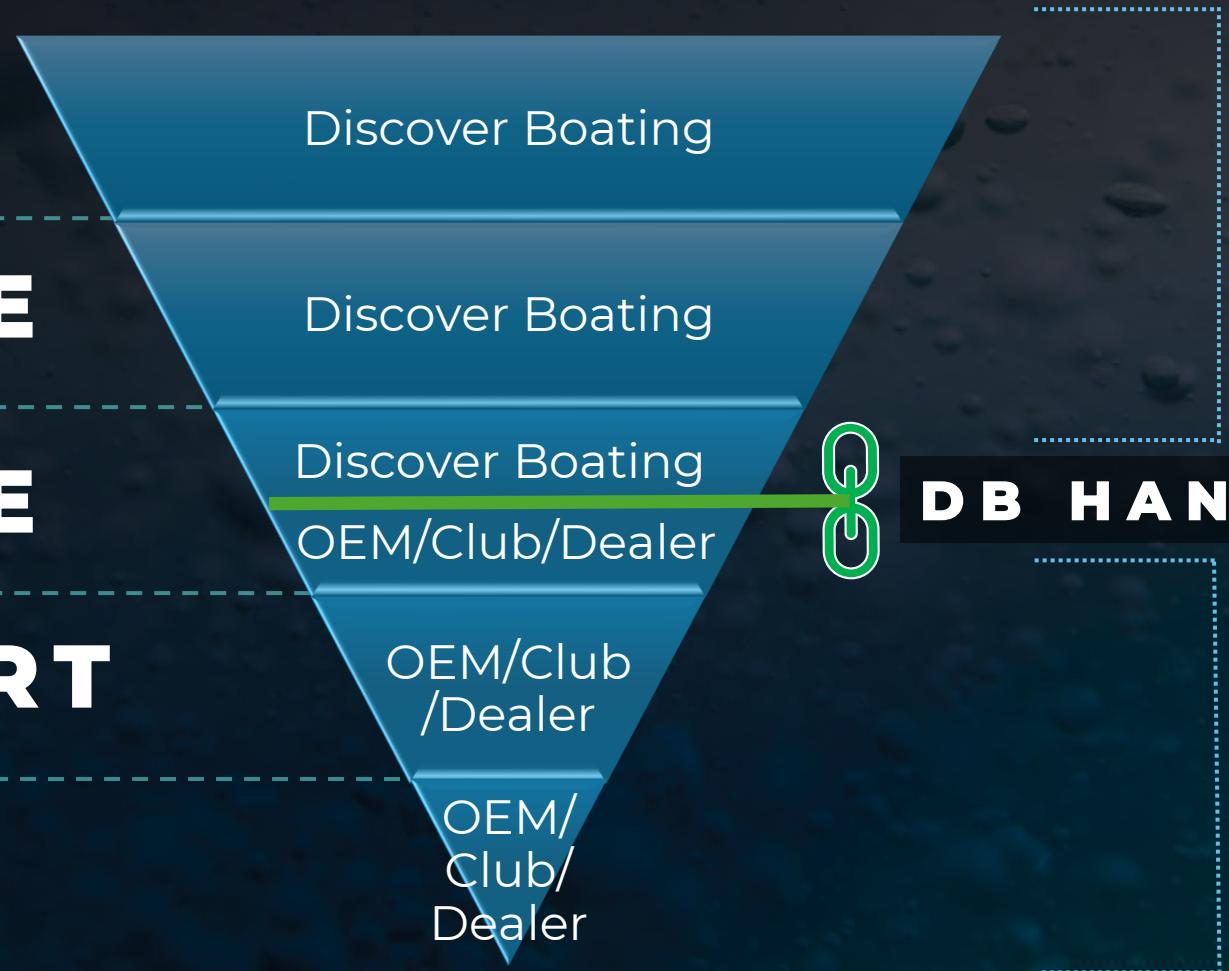
REACH

INSPIRE

ENGAGE

CONVERT

RETAIN



**CATEGORY
MARKETING**

DB HANDOFF

**PERFORMANCE
MARKETING**

A CONNECTED CONSUMER JOURNEY DRIVES GROWTH

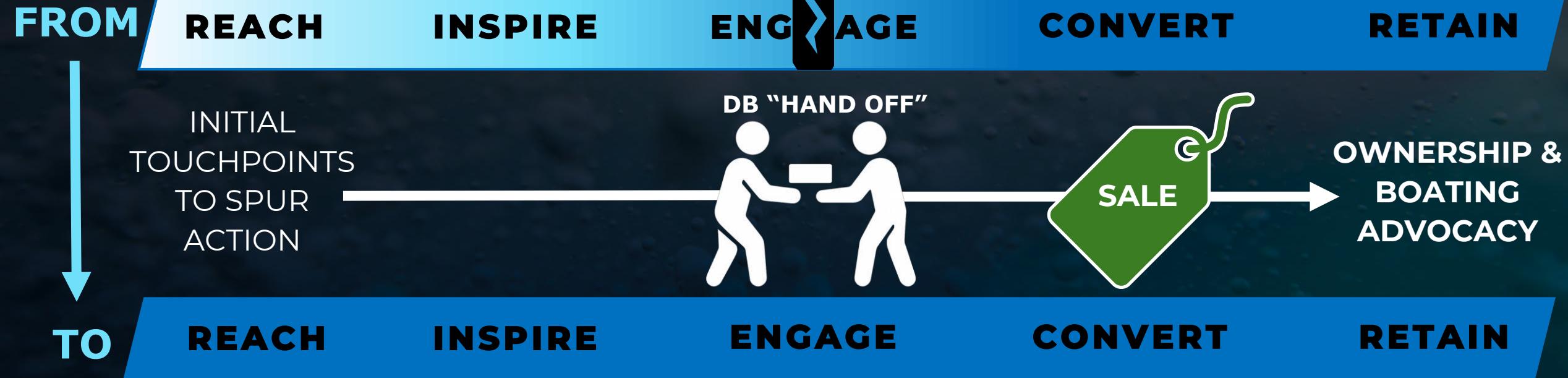
CATEGORY MARKETING

Discover Boating Must Drive



PERFORMANCE MARKETING

OEMs & Dealers Must Own



SOLUTIONS TO KEY ISSUES

OUR SOLUTIONS TO ADDRESS KEY ISSUES

KEY ISSUES

CURRENT CHALLENGE

SOLUTIONS

Overly Broad Spend

Current approach spreads resources too thin, trying to be everything to everyone

Marketing Funnel Gaps

Lack of clarity on DB's role creating industry marketing gaps, limiting growth

Measurement Gap

Unclear metrics and KPIs prevent understanding of success

Leverage Ipsos research to precisely target future boaters

Focus DB in “Reach” and “Inspire” & improve “hand-off”

Implement Health Score w/ KPIs to track, communicate success

WHAT WILL WE MEASURE?

Marketing Funnel

REACH



INSPIRE



ENGAGE

Outcome

MORE PEOPLE MORE OFTEN

THEM TO LEARN MORE & ENGAGE

WITH OEM'S, CLUBS OR DEALERS

Health Score Measure

→ Target Segment Reach

→ Share of Voice (%)

→ Search Trends (index)

→ DB.com Content Use

→ Social Engagement

→ Event Attendance (K)

→ Qualified Referrals (K)

→ Participation (M)



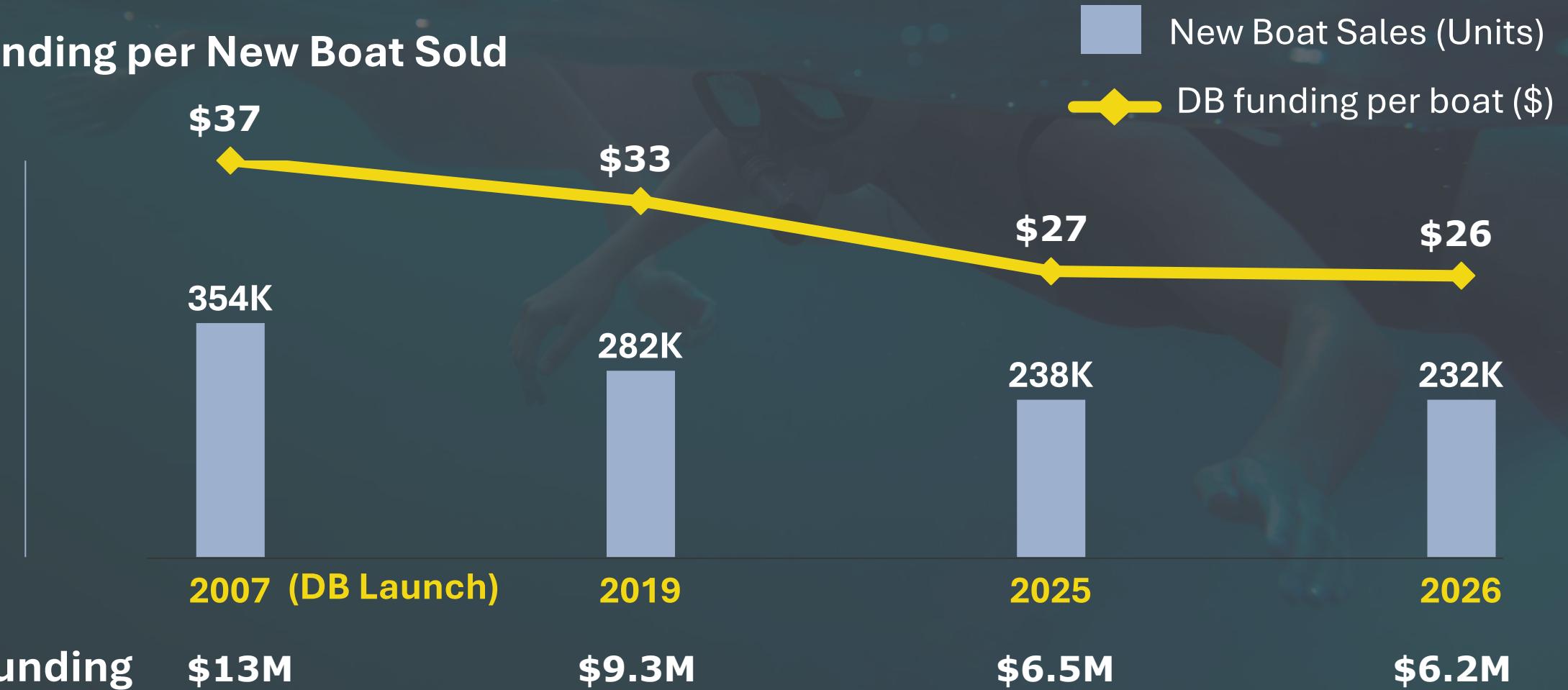
THE HEALTH SCORE IS OUR SCOREBOARD

If the health score goes up, it means more people are discovering boating, engaging with it, and being referred, and when that happens...

WE WILL GROW BOATING

AS WE'VE REDUCED DISCOVER BOATING FUNDING, UNIT SALES HAVE FALLEN

DB Funding per New Boat Sold



DB Funding \$13M

\$9.3M

\$6.5M

\$6.2M

(\$2M from NMMA operating cash to keep flat w/2025)

CRAWL-WALK-RUN



Fiscal Year 2026
to test our
assumptions and
validate strategy

Present new
validated plan
for 2027 -2029

Execute plan and
provide more
opportunities for
further expansion

STAY ENGAGED

- **DB Miami International Boat Show**
 - Advisory Group Panel at Industry Breakfast, Feb. 12
 - Marine Marketers of America Event, Feb. 12
- **NMMA/MRAA Member Webinar**
 - Ipsos Consumer Audience Research, March 4
- **Tune in to NMMA & MRAA Channels for Updates**



Q&A



THANK YOU
& WELL,
SEE YOU
OUT HERE
ON THE WATER

