

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*



A scenic view of the Chicago skyline at sunset, with the Willis Tower prominently in the center. The sky is a mix of orange, pink, and purple. Several sailboats are visible on the water in the foreground.

AGENDA

INDUSTRY – CURRENT STATE

DISCOVER BOATING – CURRENT STATE

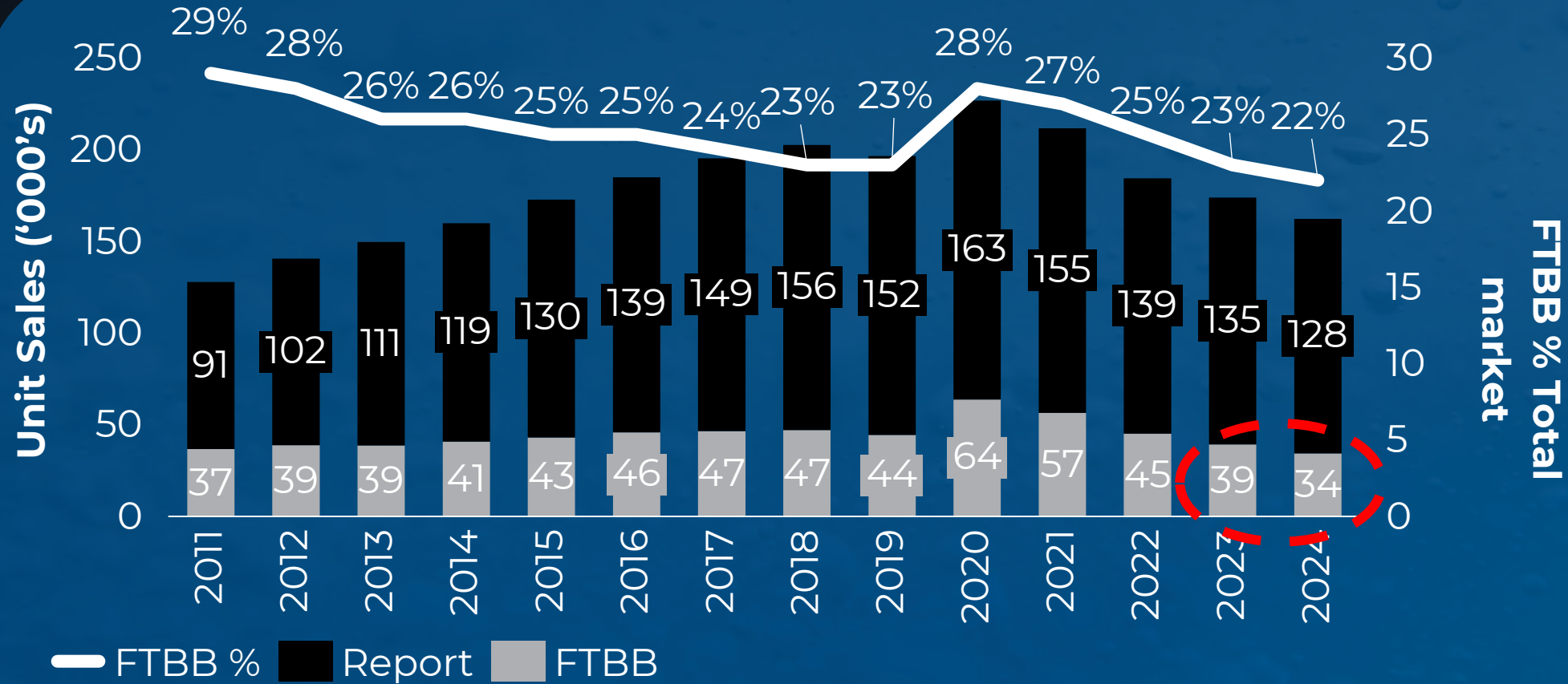
OUR SOLUTIONS TO SUCCESS

HOW WE MEASURE SUCCESS

A scenic view of the Chicago skyline at sunset, with the city's skyscrapers silhouetted against a vibrant orange and pink sky. Several sailboats are visible on the water in the foreground, including a prominent white sailboat with a blue sail. The water is dark with gentle ripples.

INDUSTRY – CURRENT STATE

FIRST TIME BOAT BUYERS (NEW BOATS)

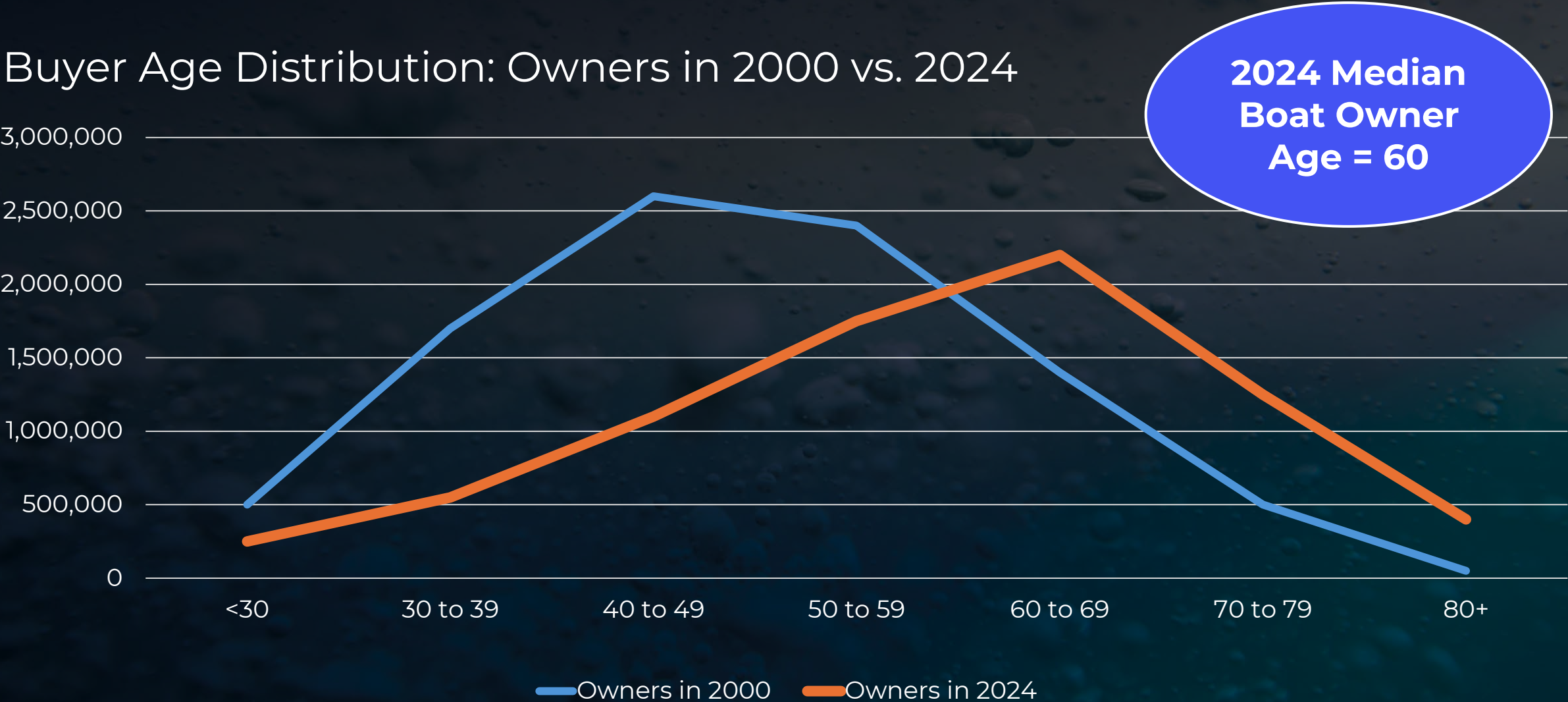


Existing boaters -5%, FTBB's -9%. No notable change in FTBB's post-COVID trading activity.

Source: Info-Link

MEDIAN BOAT OWNER HIT AGE 60 FOR FIRST TIME

Buyer Age Distribution: Owners in 2000 vs. 2024



Source: Info Link

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

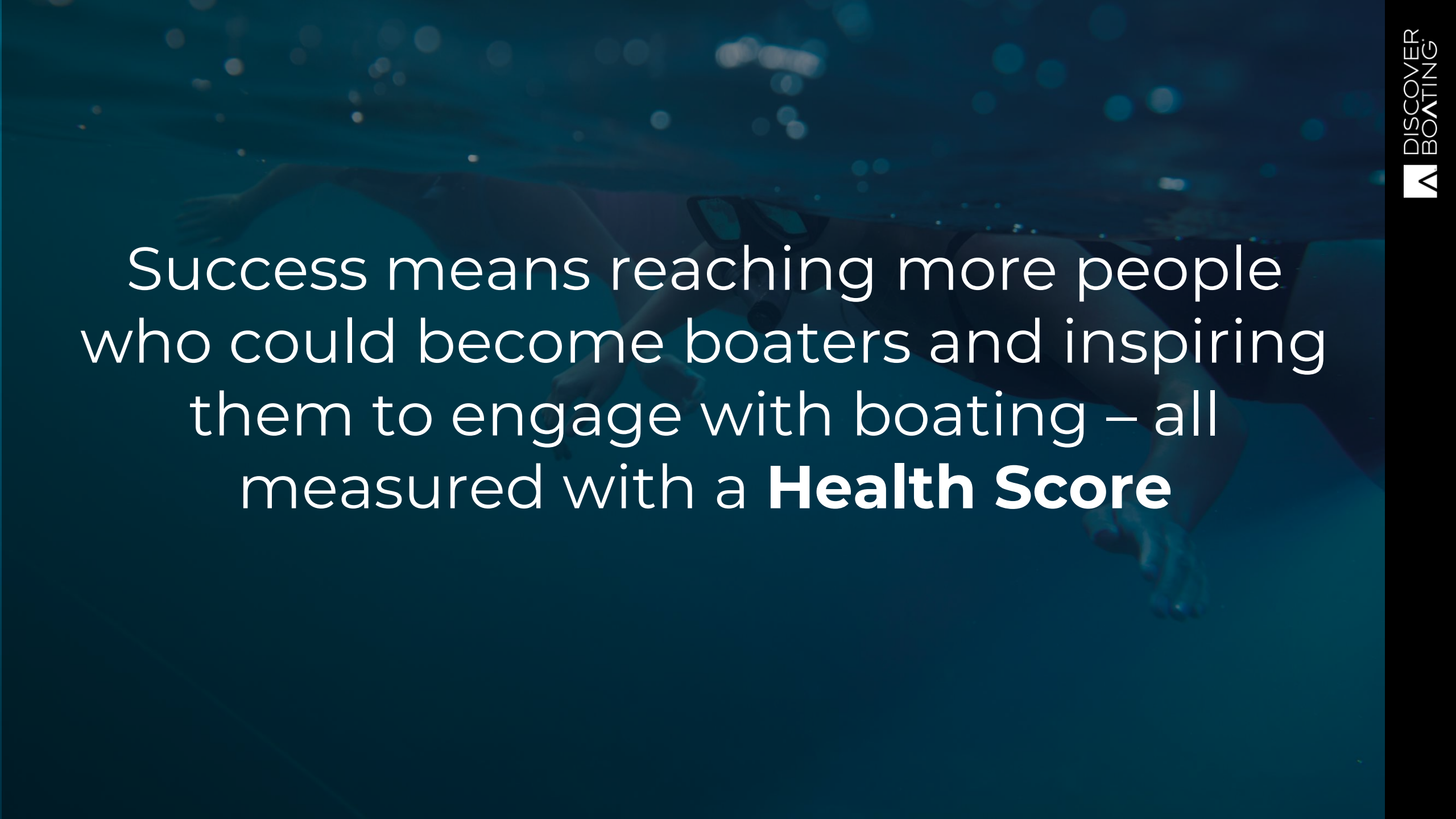
WHY:

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**



A person is swimming underwater, viewed from above. They are wearing a dark swimsuit and goggles. The water is a deep blue, and there are some bubbles visible. The text is overlaid on the image.

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



ABBIE HEIMENSEN

MarineMax
VP Marketing



AMBER HOLM

Winnebago Industries
CMEO



BRYAN SETI

Yamaha
Vice President



MATT GRUHN

MRAA
President

A scenic view of the Chicago skyline at sunset, with the city's skyscrapers silhouetted against a vibrant orange and pink sky. In the foreground, the dark, rippling water of Lake Michigan is visible, with several sailboats scattered across the horizon. The overall mood is serene and picturesque.

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

**Overly Broad
Spend**

Measurement Gap

**Marketing
Funnel Gaps**

CURRENT CHALLENGE

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

Discover Boating

INSPIRE

Discover Boating

ENGAGE

Discover Boating
OEM/Club/Dealer

CONVERT

OEM/Club
/Dealer

RETAIN

OEM/
Club/
Dealer

**CATEGORY
MARKETING**

DB HANDOFF

**PERFORMANCE
MARKETING**



A CONNECTED CONSUMER JOURNEY DRIVES GROWTH

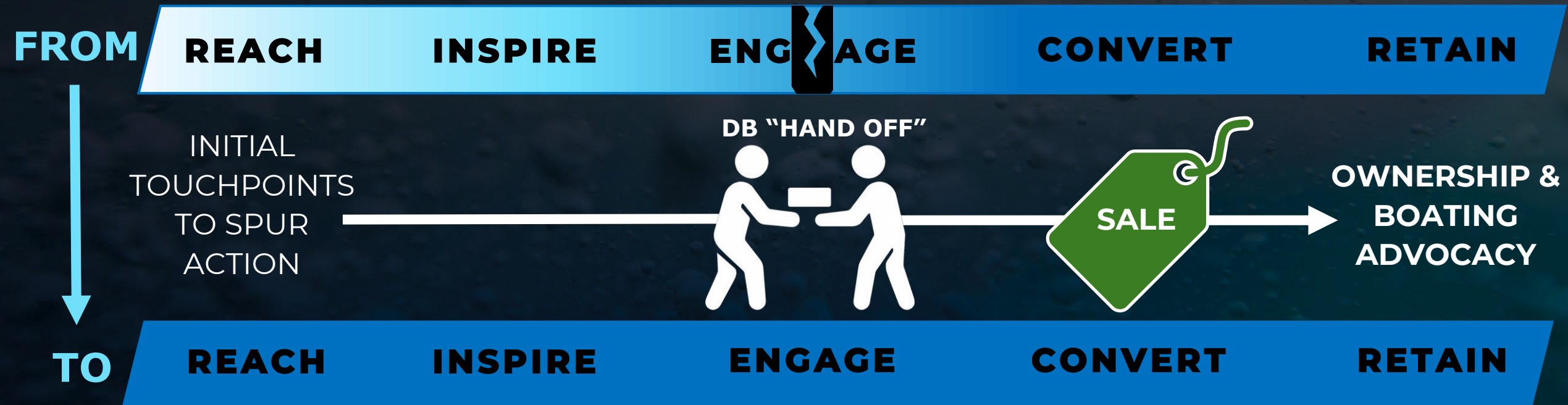
CATEGORY MARKETING

Discover Boating Must Drive



PERFORMANCE MARKETING

OEMs & Dealers Must Own



A scenic view of the Chicago skyline at sunset, with the Willis Tower prominently in the center. The sky is a mix of orange, pink, and purple. Several sailboats are visible on the water in the foreground. The text "SOLUTIONS TO KEY ISSUES" is overlaid in white, bold, sans-serif font.

SOLUTIONS TO KEY ISSUES

OUR SOLUTIONS TO ADDRESS KEY ISSUES

KEY ISSUES

Overly Broad Spend

Marketing Funnel Gaps

Measurement Gap

CURRENT CHALLENGE

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

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

Unclear metrics and KPIs prevent understanding of success

SOLUTIONS

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

Outcome

Health Score Measure

REACH



MORE PEOPLE MORE OFTEN

→ Target Segment Reach

→ Share of Voice (%)

→ Search Trends (index)

INSPIRE



THEM TO LEARN MORE & ENGAGE

→ DB.com Content Use

→ Social Engagement

→ Event Attendance (K)

ENGAGE

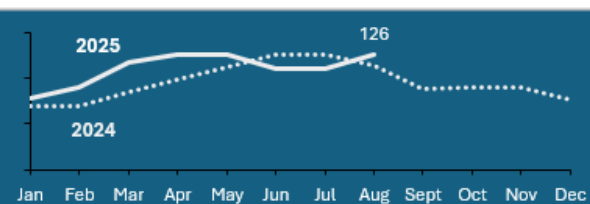
WITH OEM'S, CLUBS OR DEALERS

→ Qualified Referrals (K)

→ Participation (M)

Health Score Index August 2026

Weighted score of
KPIs indexed to
achievement of their
95% highest point in
the past 3 years

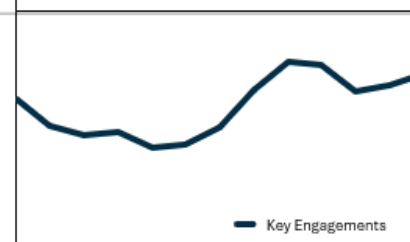
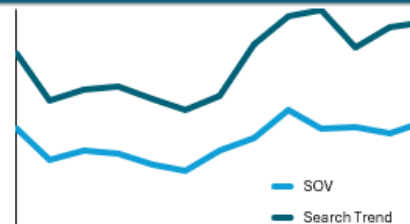


126

↑ +10%

YOY
Change

Interest	→ Target Segment Reach	31.2	28.1	3.1	11%	↑
	→ Share of Voice (%)	34%	10%	10%	0.0	↔
	→ Search Trends (index)	0.90	0.77	0.1	17%	↓
Inspire	→ DB.com Content Use	750	662	88.5	13%	↑
	→ Social Engagement	33%	100	86	14.5	↔
	→ Event Attendance (K)	250	203	47.5	23%	↑
Evaluate	→ Qualified Referrals (K)	150	139	11.0	8%	↑
	→ Participation (M)	75 ('25)	74 ('24)	1.4	2%	↑



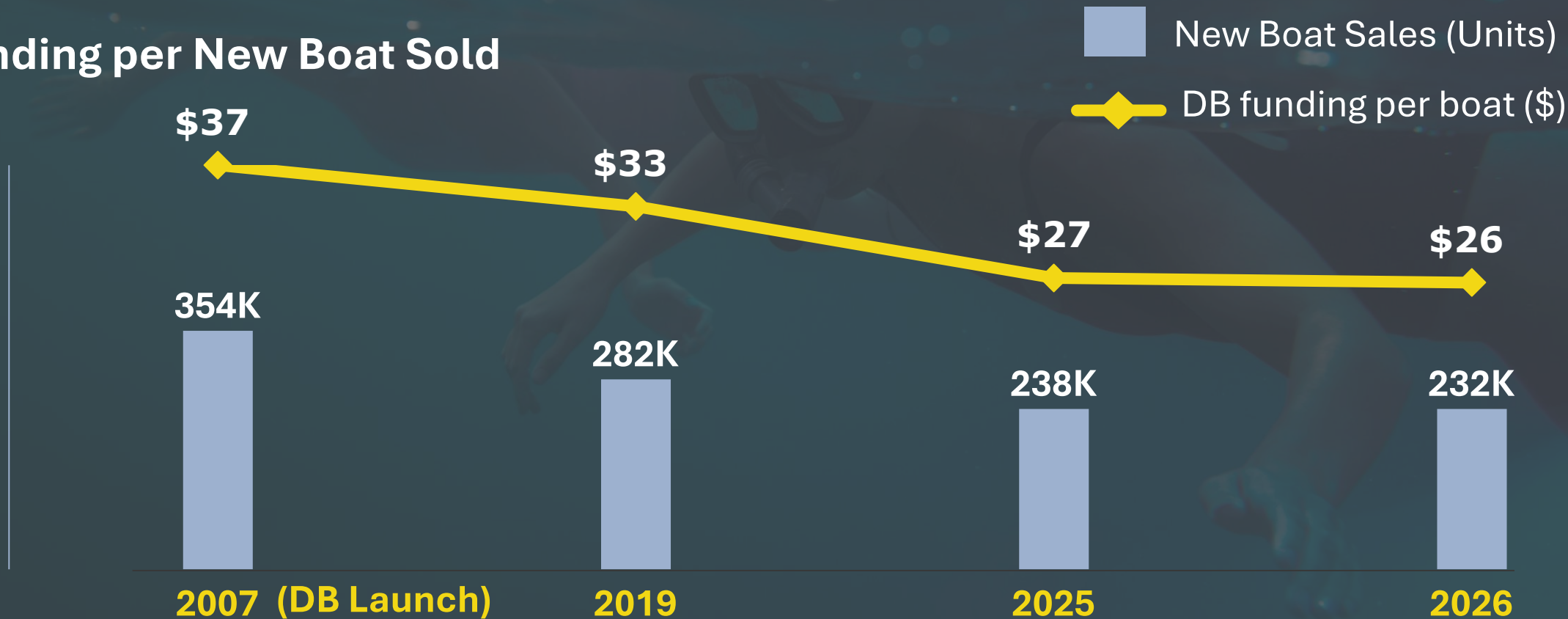
THE HEALTH SCORE IS OUR SCOREBOARD

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



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
& WE'LL
SEE YOU
OUT HERE
ON THE WATER