

An underwater photograph of a person swimming, viewed from above. The person is wearing a dark swimsuit and is positioned horizontally in the center of the frame. The water is a deep blue color with some light reflections and bubbles. The text is overlaid on the image in a large, white, sans-serif font.

Ipsos Consumer Research Study Snapshot

METHODOLOGY

Surveyed U.S. adults to identify current owners, potential boat owners and what factors impact their boat buying decisions. The ultimate goal was to estimate the size of the potential boat owner market.

Phase 1: Comprehensive National Survey

July 2025

- N=1,000 adults (18+) representative of the U.S. population surveyed for **ownership and purchase intent**
- **Goal:** establish baseline estimates of the market size

Phase 2: Prospects Survey

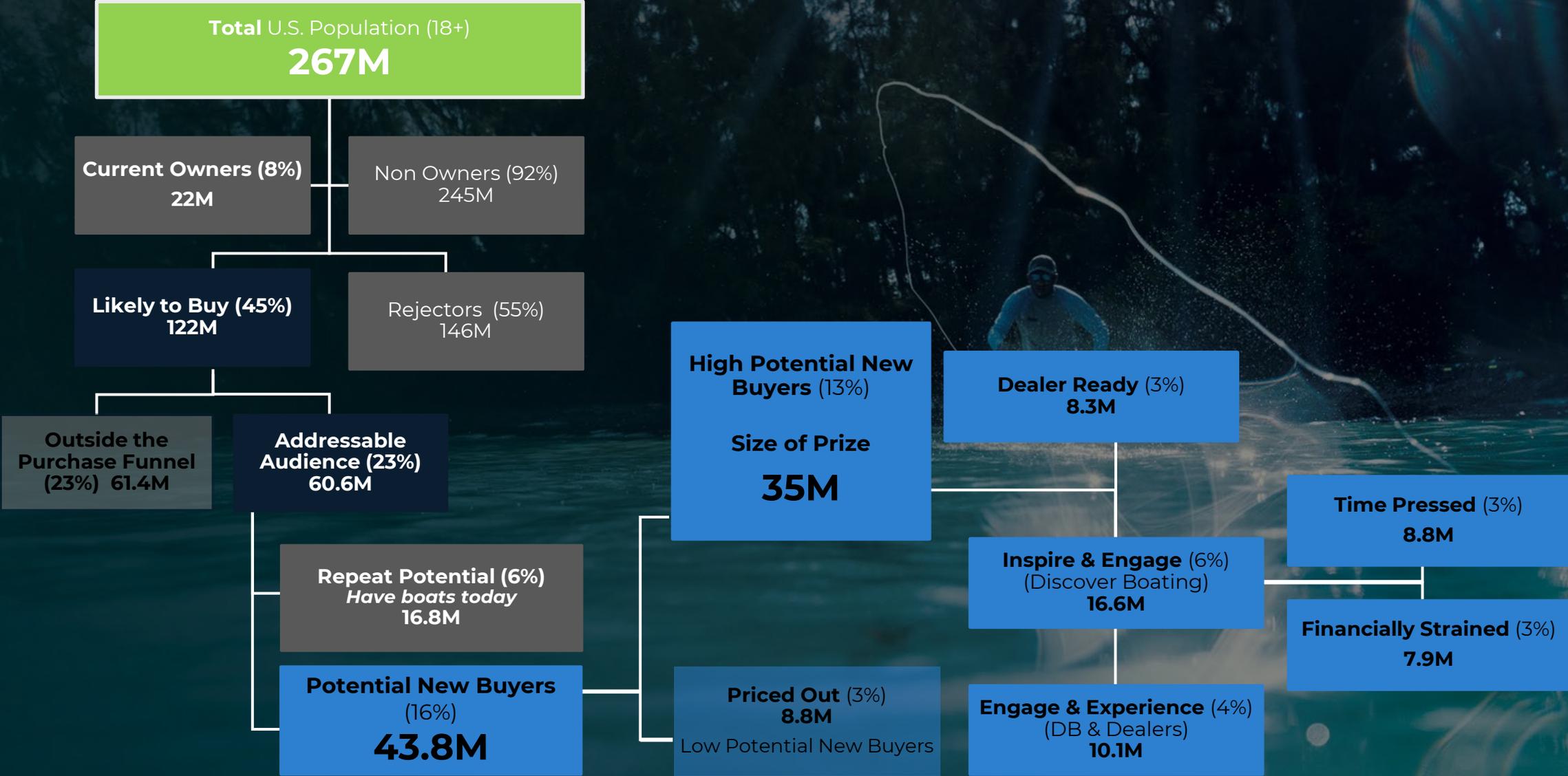
Aug./Sept. 2025

- N=500 qualified prospects (50% likely to buy)
- **Segmented by purchase readiness:** timeframe, likelihood, income and barriers to entry
- Identified **more ready vs. less ready** buyers to inform targeting strategies

Phase 3: Market Estimates

- Applied survey insights to U.S. population—**267M adults**
- Project total number of **potential boat owners**

MARKET ESTIMATES: Potential Boat Buying Audiences

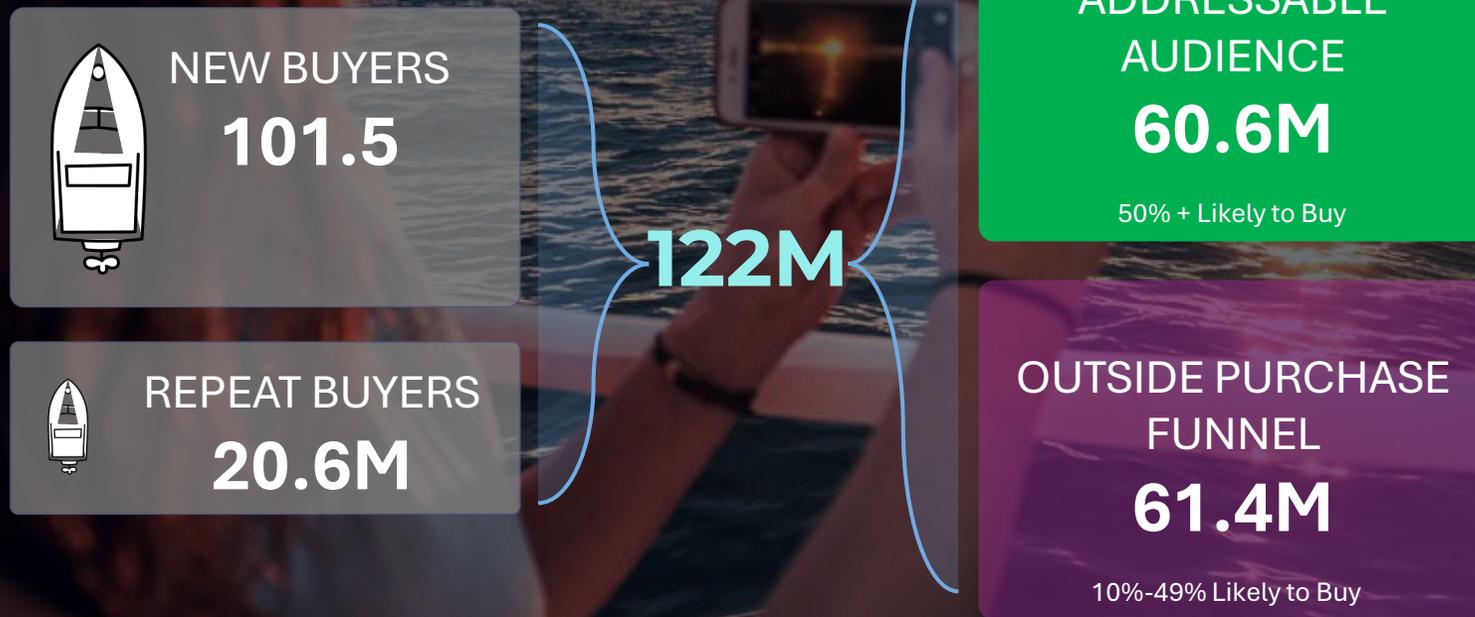


LIKELY TO BUY: 122M

45% of the U.S. population is interested in boating with half sitting outside the purchase funnel

TOTAL POTENTIAL AUDIENCE

*(45% of the total us population 18+
At least 10% likely to buy a boat in the future)*





POTENTIAL NEW BUYERS: 44M



High Potential New Buyers

SIZE OF PRIZE:
35M

OPPORTUNITY: 35M in the Funnel

13% of U.S. population | High Potential New Buyers | 50% likely to buy/never owned a boat

Inspire/Engage

Discover Boating Target

16.6M

Demographics: Millennials + Gen X | Hispanic skew

Barriers: Experience | Time | Affordability

Budget: \$ (lowest)

Engagement: Least active on social media | Apprehensive



Influenced by



Engage/Experience

DB Handoff (OEM, Dealer)

8.3M

Demographics: Gen Z | Black & Hispanic skew | Northeast concentration

Barriers: Access | Experience

Budget: \$\$ (average)



Influenced by



Sales Ready

OEM, Dealer Target

10.1M

Demographics: Millennials with kids | West Coast skew

Advantage: Experienced | Informed | Enjoy travel

Budget: \$\$\$ (highest)



Influenced by

