

PURPOSE OF THE STUDY

Discover Boating partnered with Ipsos to conduct qualitative and quantitative research into current market dynamics and emerging trends. This collaboration delivers strategic insights to help the marine industry retain current boaters and accelerate growth across the recreational boating category.

Our Approach

- 1** Industry Interviews
- 2** Horizon Scan
- 3** Quantitative Survey
- 4** Future Proofing Analysis



Target Groups Overview

To drive sustainable growth in the recreational boating category, the marine industry must develop a precise understanding of both current boat owners and future buyers.

Through comprehensive research, we identified **six distinct target groups** representing the **most critical segments** of current and prospective customers.



Current Owners

People who currently own at least one boat

Established Owners

Recent Buyers



Prospective Owners

People who may be interested in owning a boat in the future

Sales Ready

Inexperienced

Time-Pressed

Cost-Conscious

Key Insights



Exposure to water and experience with boating-adjacent activities correlate with **boat ownership**.



These prospective owners are navigating **financial concerns**, embracing **non-ownership access models**, and moving through a **redefined purchase journey** shaped by new decision-making touchpoints.



These current owners skew **older, wealthier**, and more **educated**, with a more **optimistic view** of their personal finances and a strong reliance on **manufacturer and dealer websites**, alongside online reviews, as trusted decision-making resources.



These prospective owners skew **younger** and more **price-constrained**, engaging with boats primarily through **charters and rentals** and relying more heavily on **friends, family, YouTube, and social media** for guidance.



Key Implications via Future Proofing

OEMs

- o Communicate boating as an activity that can be enjoyed within a **moderate budget**, and serve as a **trusted mentor** by offering easy-to-understand guides
- o Strategically partner with **influencers on social media** and post videos on **YouTube** to gain more visibility and interest

Dealers

- o **Remove anxiety** that comes from the “fear of the unknown” regarding costs and research
- o Ensure **ease of mobile experience** matches the quality of in-person service and engagement

Discover Boating

- o **Normalize access** as an important steppingstone to become boat owner
- o **Leverage power of existing owners** through owner-led events for prospective boaters, such as owner outings and referral programs

Key Insights and Implications are based on combined qualitative and quantitative data. Discover Boating/Ipsos, In-depth qualitative interviews with 13 industry leaders conducted July 7, 2025 through August 6, 2025. Discover Boating/Ipsos, Quantitative Survey Fielded August 22, 2025 through September 12, 2025; N=500 Boat Owners, N= 500 Lapsed Owners, N=500 Prospective Owners; Boat Owners and Lapsed Owners defined as own (or used to own) and consider primary vessel a motorized/power boat or sailboat; Prospective Owners defined as 50% or more likely to purchase a motorized/power boat or sailboat in the future and not a current or lapsed owner. Findings reflect survey respondent opinions only.