

A person is swimming underwater in a pool, viewed from above. The water is a deep teal color, and there are some light reflections on the surface. The swimmer is wearing a dark swimsuit and is in a horizontal position, with their arms and legs slightly spread. The overall mood is serene and focused.

# Ipsos Consumer Research 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

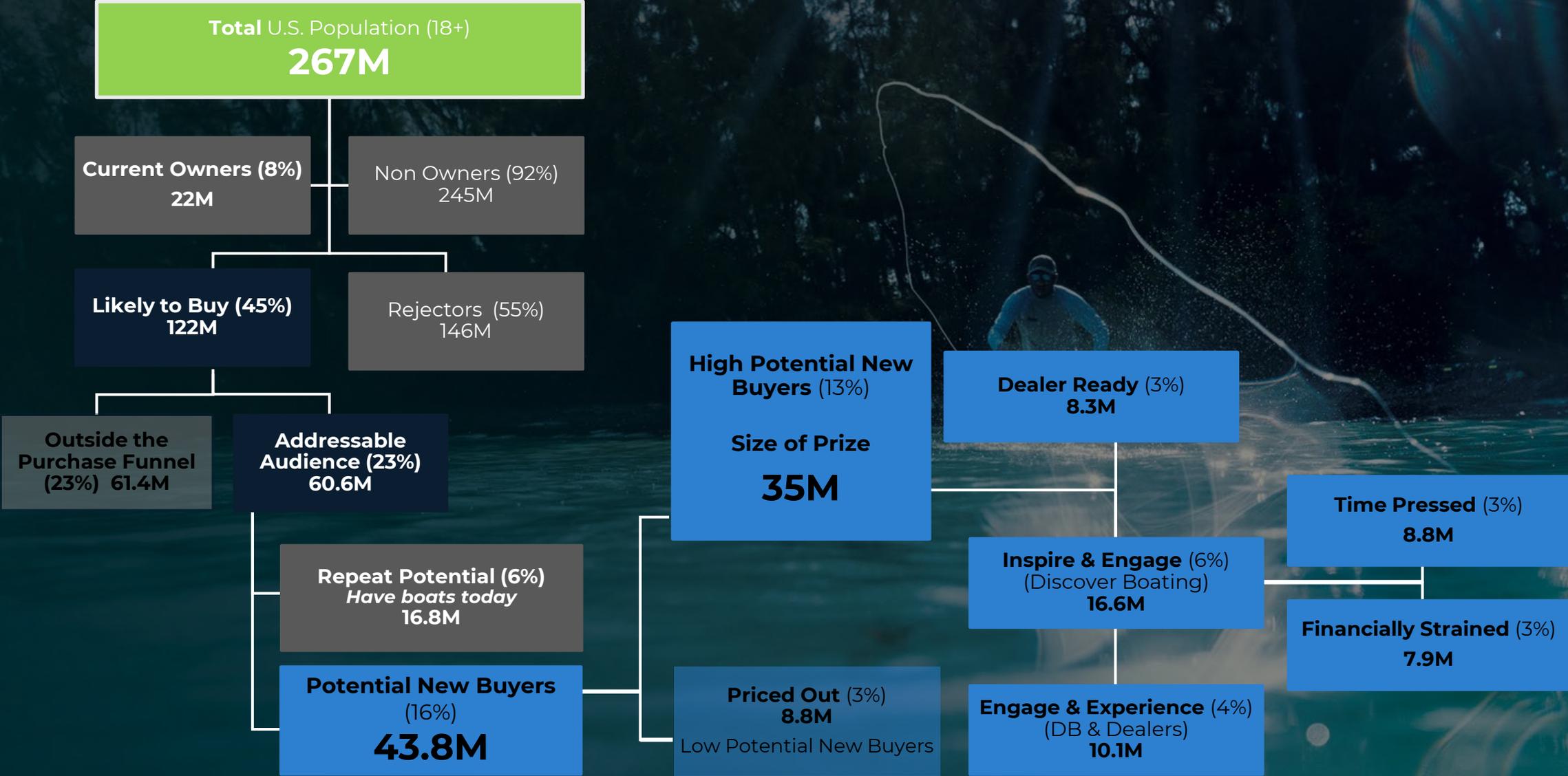
Aug./Sept. 2025

- 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

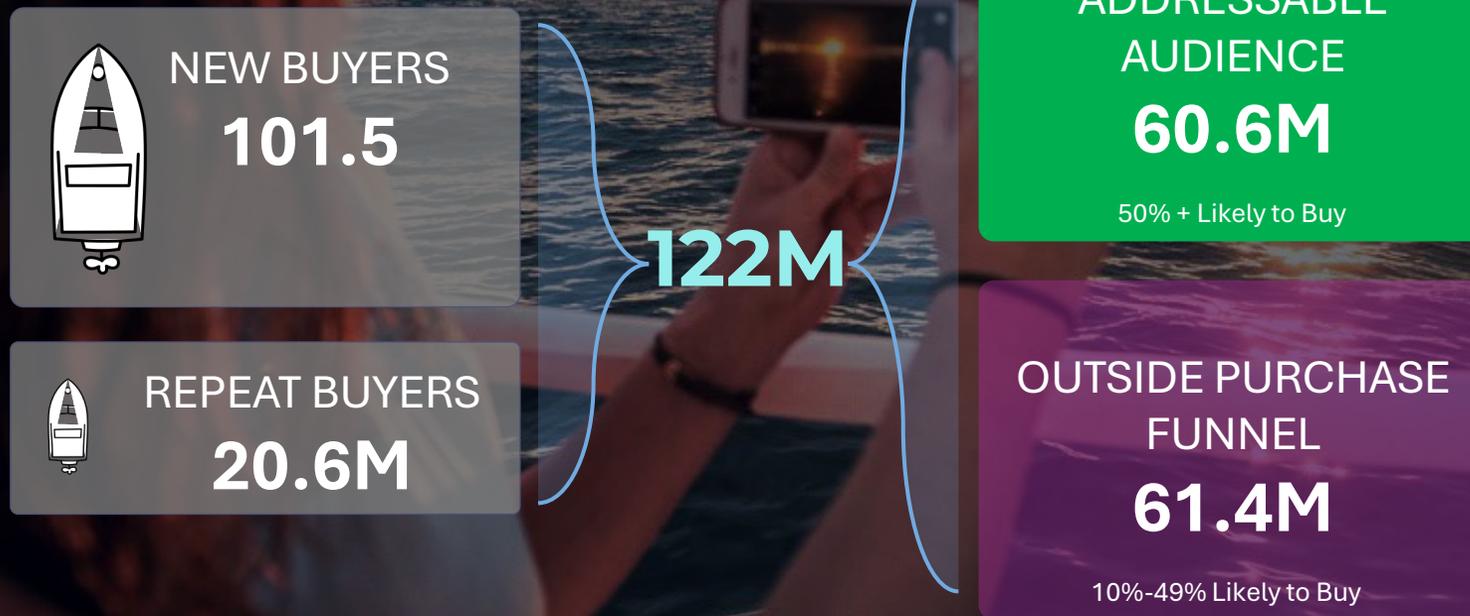


# LIKELY TO BUY: 122M

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 Hand Raisers (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

