

# CHARTING A COURSE FOR GROWTH

Handbook for Manufacturers

March 2026

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# Background

# & Objectives

Discover Boating partnered with Ipsos, a Market Research and Consultancy specialist, to gain strategic insights on the evolving dynamics of recreational boating. This collaboration aimed to help Discover Boating understand the landscape today, trends that will shape recreational boating, and actions to take to retain and grow the category.

To achieve these objectives, Ipsos conducted qualitative interviews with industry leaders and quantitative research with current and potential boat owners.

#1

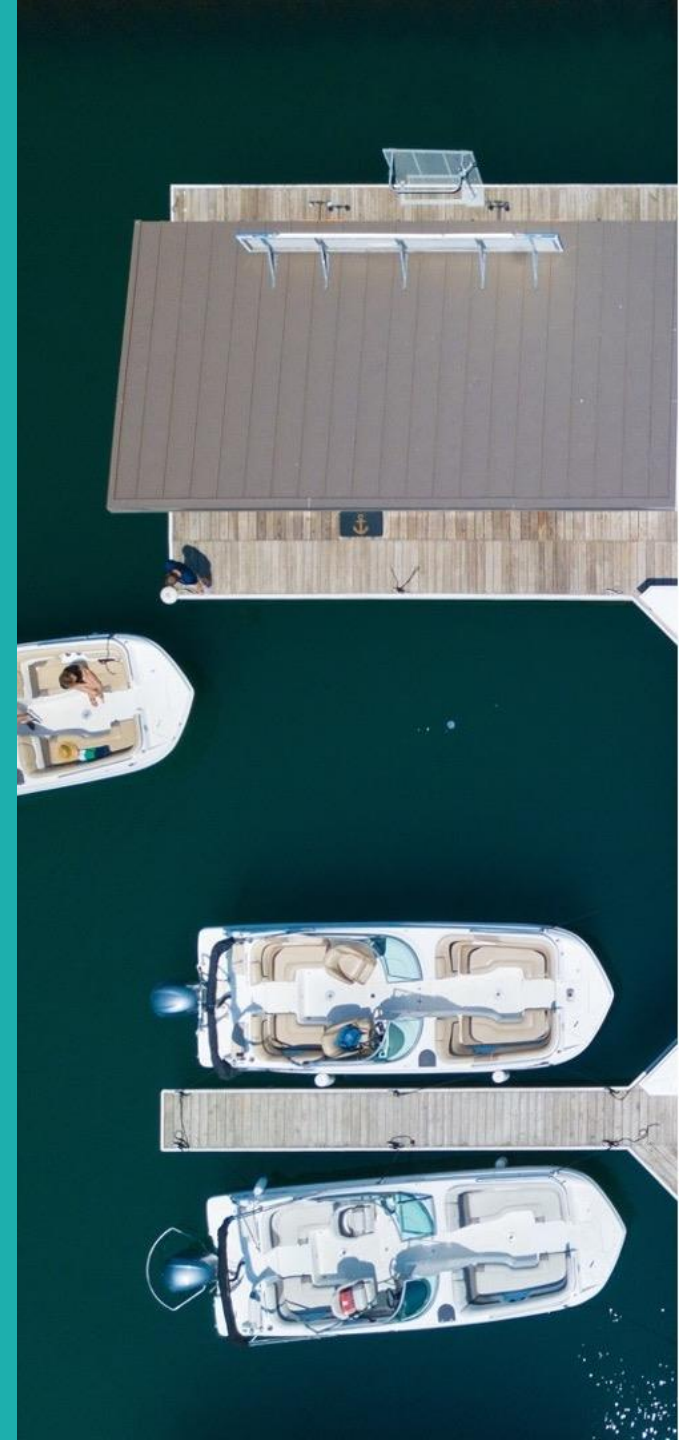
Uncover macro forces affecting today's consumer that will impact the boating category and broader operating context

#2

Highlight how the Boat Owner has changed, focusing on how they access boating, learn, are influenced, and make purchases & who the Owner of Tomorrow will be

#3

Explore and identify predictive factors that indicate likelihood to own a recreational boat



# How to use this handbook

This handbook synthesizes our comprehensive insights for Discover Boating into two sections of practical insights and recommendations:

- 1) Today's Boating Landscape:** An overview of who current and potential boaters are, with detailed profiles on the most promising prospects
- 2) Futureproofing analysis and recommendations** for Discover Boating, Manufacturers, and Dealers to connect more effectively with boaters over the next 3 years.

We recommend that Manufacturers and Dealers begin by reviewing the Executive Summary, followed by the "Today's Boating Landscape" section. They can then proceed to explore the profiles, insights, and strategic recommendations relevant to their specific interests.



An aerial photograph of a marina filled with numerous white and blue boats docked at wooden piers. The water is a deep teal color. The text is overlaid on the left side of the image.

# EXECUTIVE SUMMARY

Selection of key insights  
from the handbook

# Defining our Target Boaters

To understand how to reach our target audiences and grow the recreational boating category, the industry needs to know who today's boat owners are and who could become owners in the future. Through our research, we have **defined two primary groups of targets: Current Owners and Prospective Owners.**

These groups are fundamentally different in their relationship with boating: one group already participates in the category while the other represents our high potential new buyers to grow the category. Each group has distinct needs, motivations, barriers that require tailored approaches to effectively engage them.

Across these two primary groups, we have identified further clusters (6 in total) that allow for even more precise targeting at specific touchpoints in the consumer's boating journey.



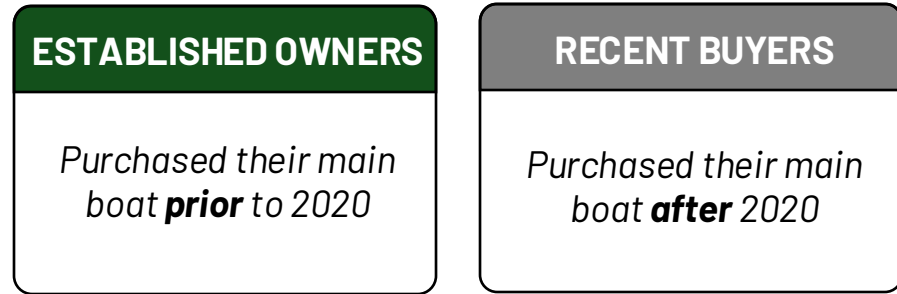
# Across these two primary groups, we identified six clusters of Target Boaters

Target Boaters clusters include both Current and Prospective Owners, and are mapped to Discover Boating, Dealers, and/or Manufacturers for targeted action



## CURRENT OWNERS

People who currently own at least one boat



Focus for..

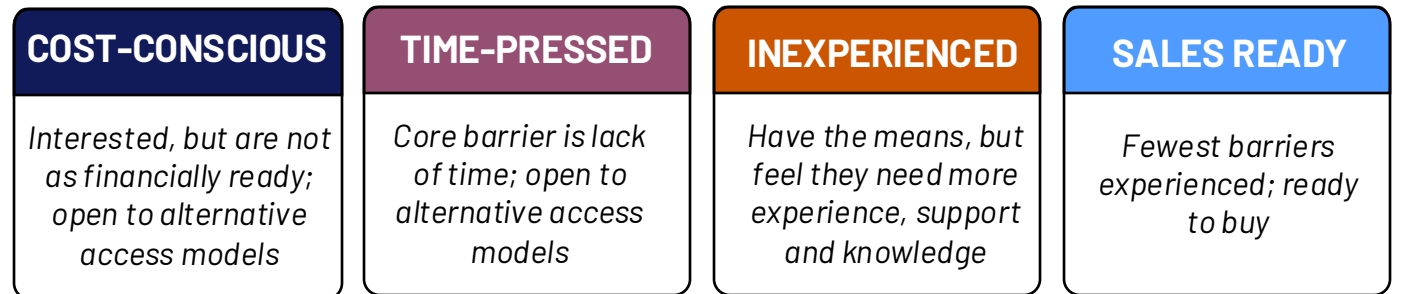
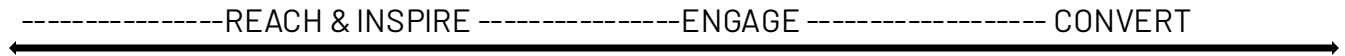


Dealers Manufacturers Discover Boating



## PROSPECTIVE OWNERS

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



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Discover Boating

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Dealers Manufacturers



Discover Boating  
(Hand Raisers)

# Current and Prospective Owners have some key differences

Prospective Owners tend to be younger, have lower income, and turn to peer-driven digital channels to engage with boating



## CURRENT OWNERS

*People who currently own at least one boat*

- Older, higher income, more educated
- Have more positive outlook on personal finances
- Value boat manufacturer websites, online articles/reviews, dealer websites as main resources



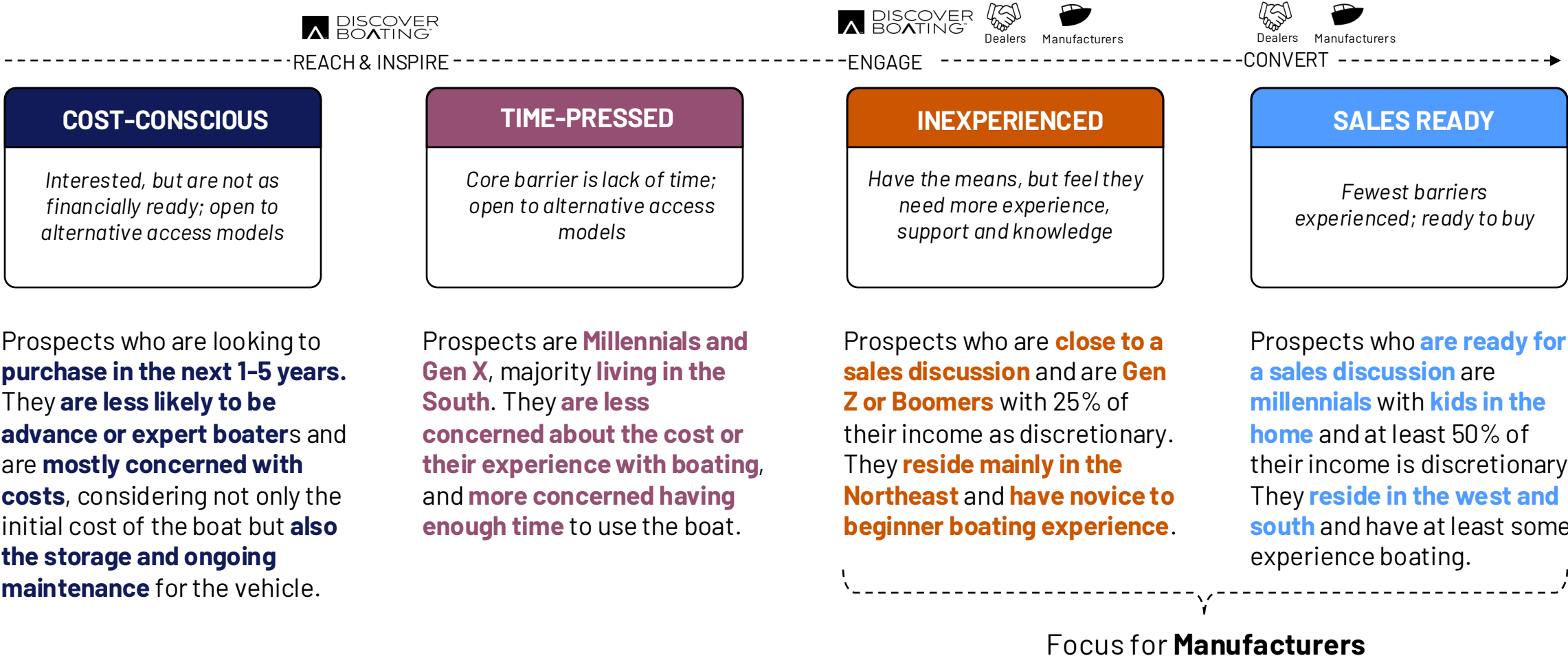
## PROSPECTIVE OWNERS

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

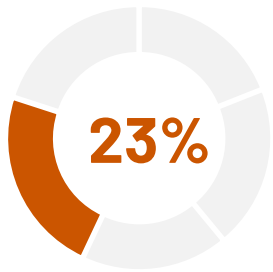
- Younger, lower income, less educated
- Higher engagement with boats via charters and rentals
- Friends and family, YouTube, and social media play a bigger role when it comes to key information resources

# Prospective Owners are also varied in their background, needs, and readiness for recreational boating

Data overviews for each Prospective Owner Target are presented in the following pages, with more data available in the appendix



# INEXPERIENCED

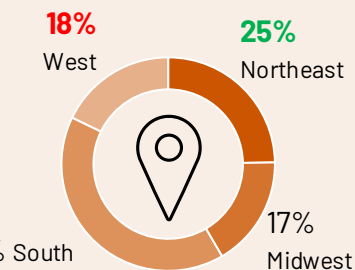
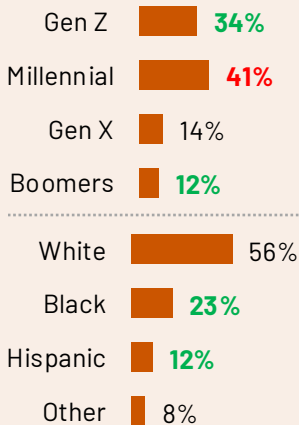


## KEY OVERVIEW

Inexperienced are prospects who are ready for a sales discussion are Gen Z or Boomers with 25% of their income as discretionary. They reside mainly in the Northeast and have novice to beginner boating experience. They are still trying to decide what type of boat to buy and are ready to buy in the next 1-2 years.

### KEY DEMOGRAPHICS

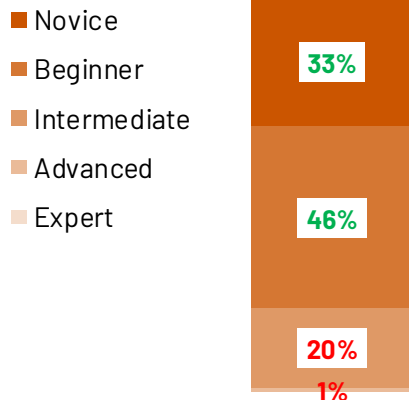
- 61%** Male
- 38%** Female
- 42%** Children in HH
- \$68.5k** Avg. Income



Miscellaneous Demographic Question, S1b, B3, HQS5, S5b, B1, B4, B2, C9, C9b

● Over Index to Total Prospects (≥120%)  
● Under Index to Total Prospects (≤ 80%)  
Indexing reported if Total Prospects%=5%+

### KNOWLEDGE LEVEL



### LIKELIHOOD TO BUY BOAT



Likely to buy on average

### PURCHASE TIMEFRAME



### TOP BOATS INTERESTED IN

- 25% Freshwater fishing boat
- 19% Yacht
- 17% Fish-and-ski boat

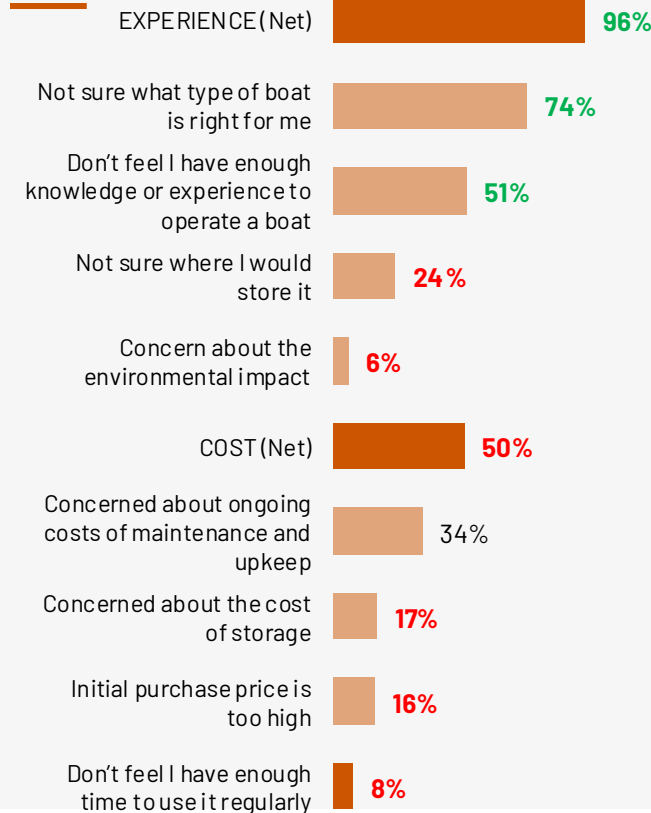
### 'DISCOVER BOATING'

16% Aware of 'Discover Boating'  
Aware of Discover Boating (n=18\*)  
\*Base too low to report (n<30)

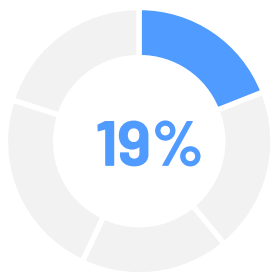
### ESTIMATED BOAT BUDGET



### BARRIERS



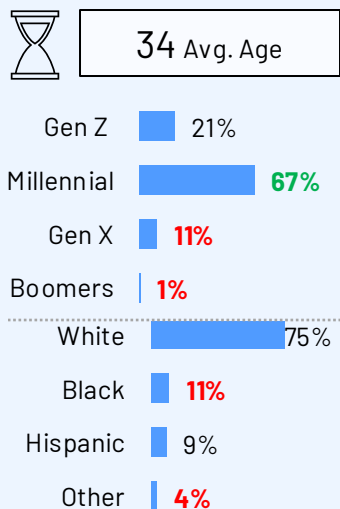
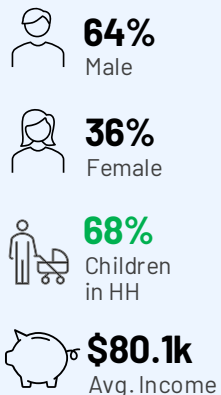
# SALES READY



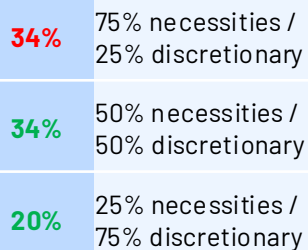
## KEY OVERVIEW

Sales Ready are prospects who are ready for a sales discussion are millennials with kids in the home and at least 50% of their income is discretionary. They reside in the west and south and have at least some experience boating. With a high income they have few barriers and are ready to buy in the next 12-24 months.

### KEY DEMOGRAPHICS



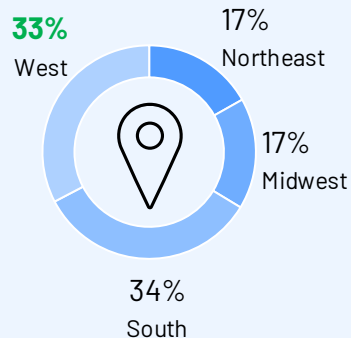
#### Discretionary Income



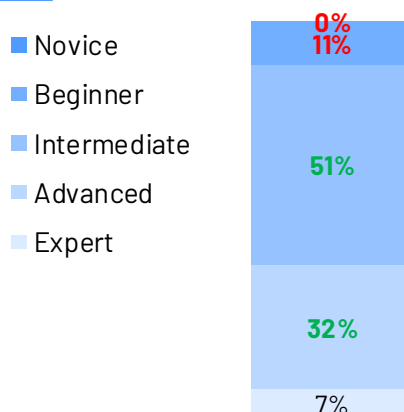
Miscellaneous Demographic Question, S1b, B3, HQS5, S5b, B1, B4, B2, C9, C9b

● Over Index to Total Prospects (≥120%)  
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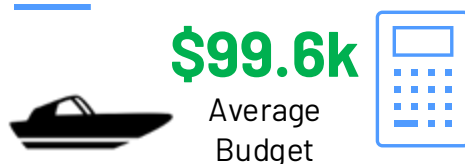
### KNOWLEDGE LEVEL



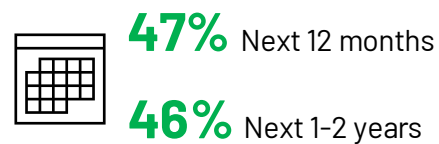
### LIKELIHOOD TO BUY BOAT



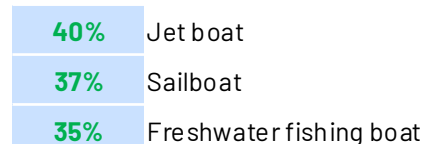
### ESTIMATED BOAT BUDGET



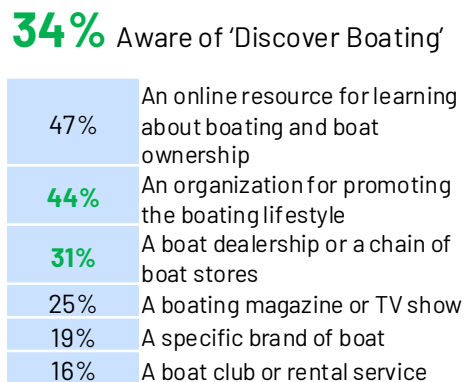
### PURCHASE TIMEFRAME



### TOP BOATS INTERESTED IN



### 'DISCOVER BOATING'



Aware of Discover Boating (n=32)

### BARRIERS



# We also identified 3 Macro Forces that not only impact consumers, but also the needs and expectations of Target Boaters and how they engage with the category

These Macro Forces will also have implications on how Manufacturers, Dealers, and Discover Boating connect with their Target Boaters

Macro Forces and its resulting Drivers of Change

## Economic Uncertainties



1. Increasing Cost of Living and Fragmented Labor Market
2. Economic Optimism and Luxury Spending
3. Changing Definition of Ownership

## Social Reconfiguration



1. Growing Diversity and Generational Shift
2. Value Reprioritization and Delay in Traditional Milestones
3. Mindful and Purposeful Living

## Tech-Celeration



1. Increased Digital Usage in All Aspects of Life
2. Openness to New Technology
3. Social Media as a Source of Influence

# Key Takeaways for: Manufacturers

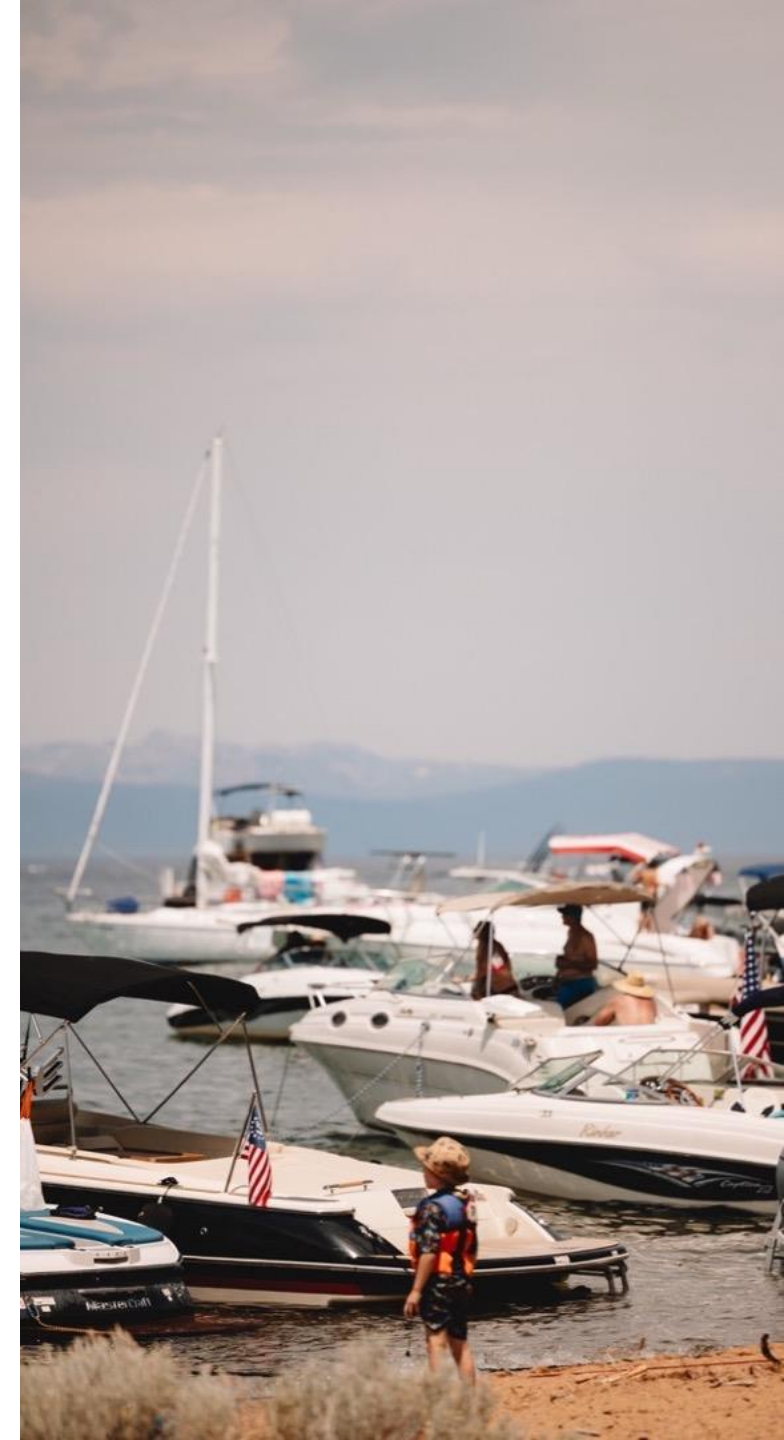
## Relevant Target Boaters

- **Current Owners (Established & Recent)**
- **Inexperienced**
- **Sales-ready**

## Ways to Connect

- Communicate boating as an activity that can be **enjoyed within a moderate budget** and serve as a **trusted mentor** by offering clear, easy-to-understand guides
- Provide resources on how boating can be enjoyed in **sustainable ways**, and for better mental health
- Actively promote boats designed **for enjoyable family and kid-friendly experiences**
- **Position new boat tech features** as enablers of efficiency, safety, and connectivity
- Develop **standardized digital assets** (e.g., video tutorials, interactive calculators) for dealers to use in the research phase of the purchase journey
- Offer **immersive digital experiences** of boat interiors and exteriors, and invest in professional video walk-throughs of high-interest models
- **Strategically partner with influencers** on social media and post videos on YouTube to gain more visibility and interest

*Further implications are detailed within the individual Target Cluster profiles in the Futureproofing section.*



# TODAY'S BOATING LANDSCAPE

Understanding Current and  
Prospective Owners

# CURRENT BOAT OWNERS

Profiles of who they are today, their needs and motivations

# Let's take a look at current boat owners...



## CURRENT OWNERS

People who currently own at least one boat

**ESTABLISHED OWNERS**

Purchased their main boat **prior** to 2020

**RECENT BUYERS**

Purchased their main boat **after** 2020

Focus for..



Dealers Manufacturers Discover Boating



## PROSPECTIVE OWNERS

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



**COST-CONSCIOUS**

Interested, but are not as financially ready; open to alternative access models

**TIME-PRESSED**

Core barrier is lack of time; open to alternative access models

**INEXPERIENCED**

Have the means, but feel they need more experience, support and knowledge

**SALES READY**

Fewest barriers experienced; ready to buy

Focus for..



Discover Boating

Focus for..



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Focus for..



Dealers Manufacturers Dealers Manufacturers

Focus for..



Discover Boating (Hand Raisers)



# There are two main segments of Current Owners, distinguished by how recently they purchased a boat

## ESTABLISHED OWNERS

Purchased their main boat **prior** to 2020



2020

## RECENT BUYERS

Purchased their main boat after to 2020

## LESS RECENT

Purchased their main boat **between** 2021-2023



2023

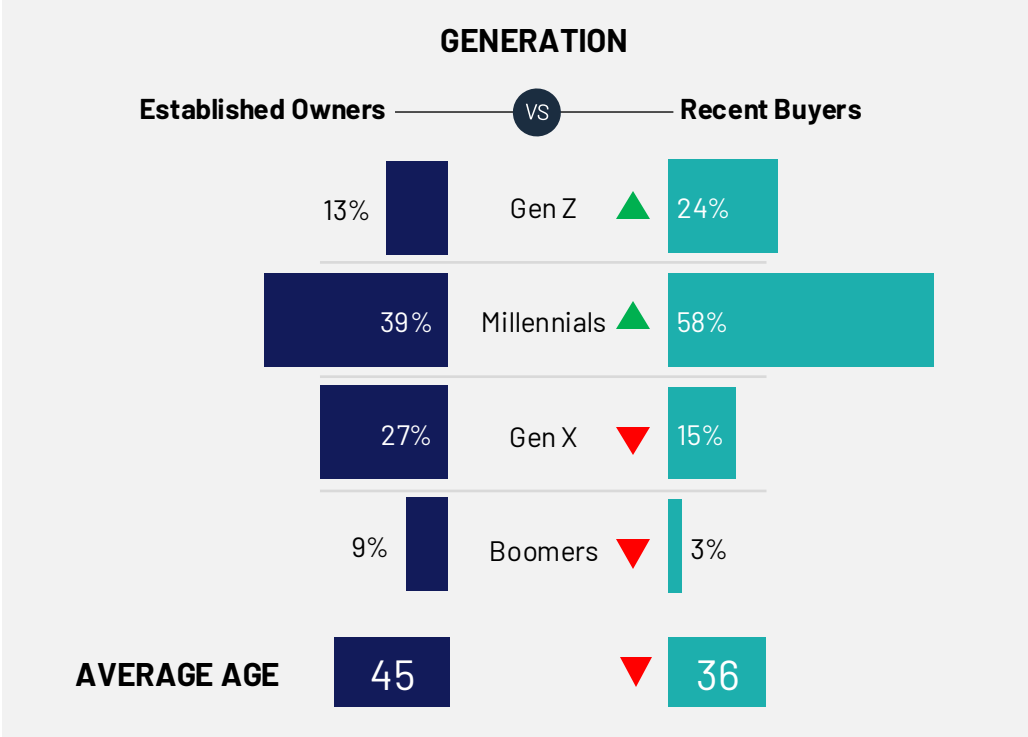
## PAST TWO YEARS BUYERS

Purchased their main boat **between** 2024-2025



2025

# Recent Buyers are different: they are younger, more diverse, and more affluent compared to the Established Owner

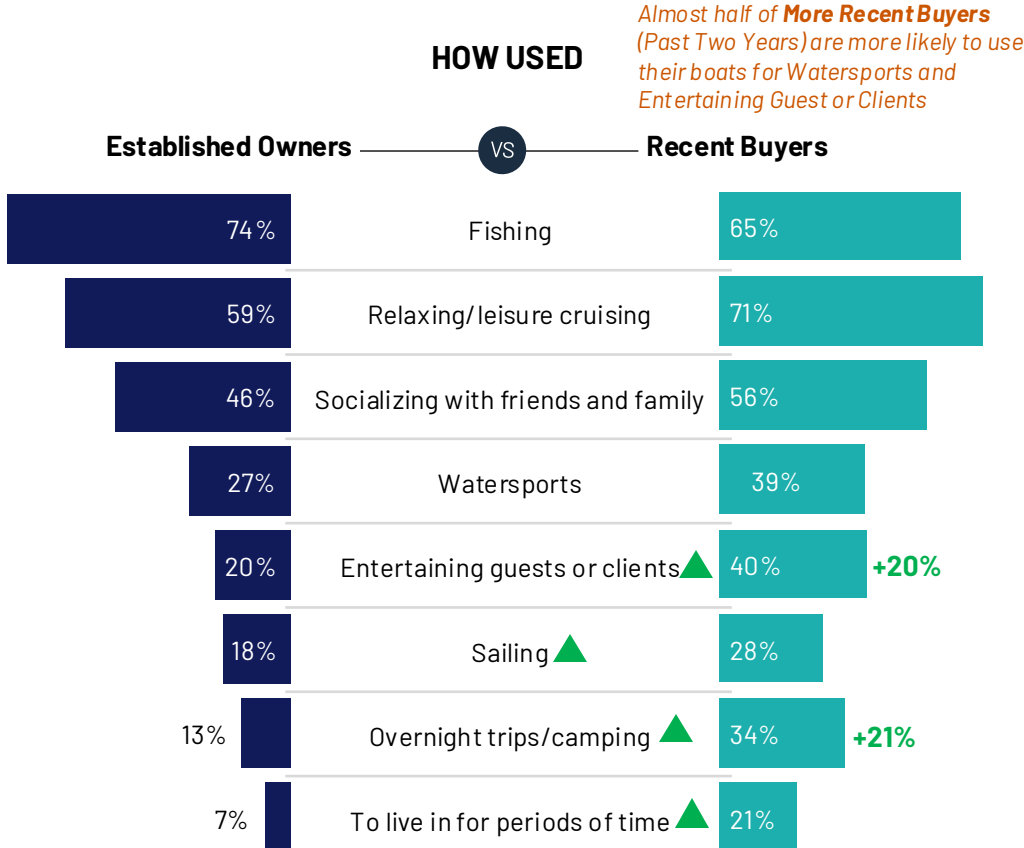
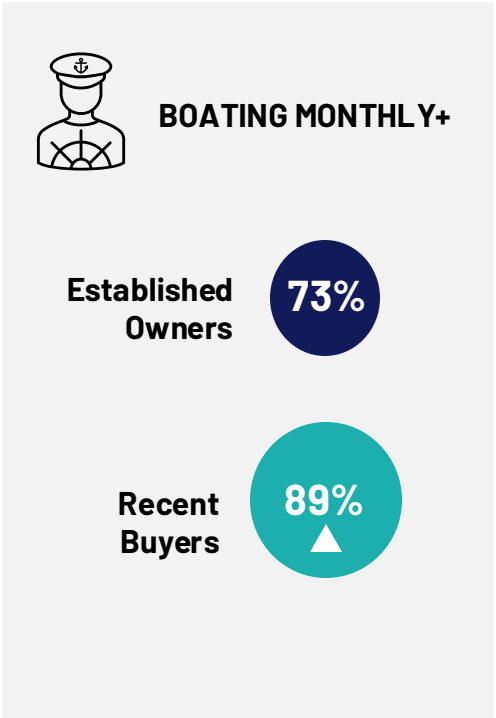
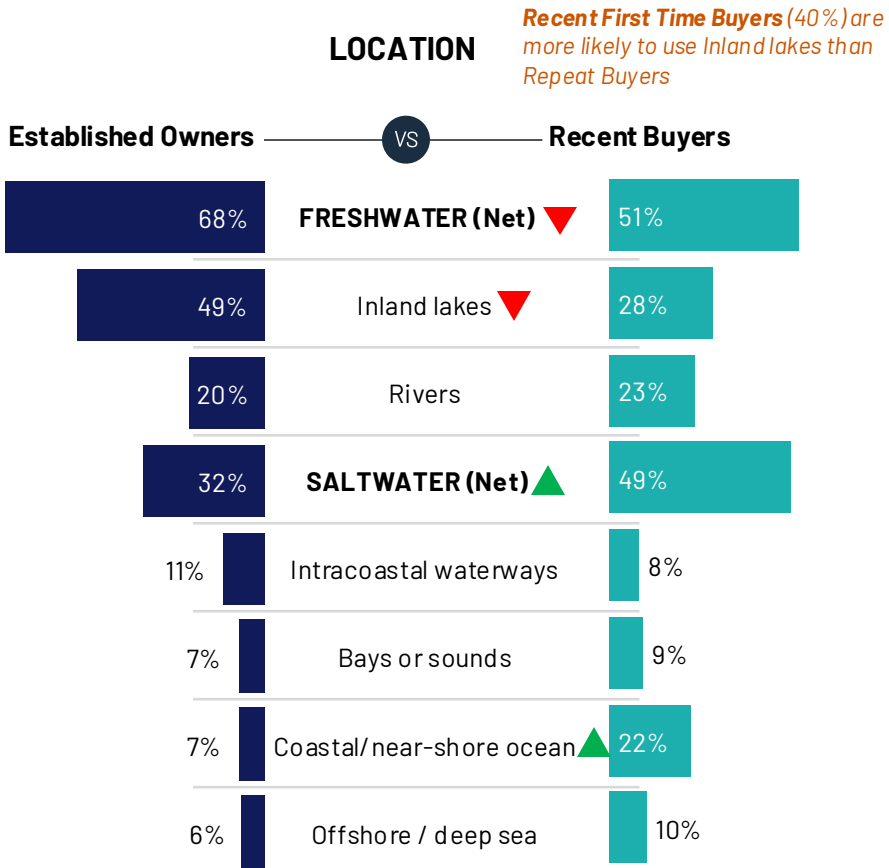


	Established Owners	Recent Buyers
<b>AVERAGE INCOME</b>	\$96k	\$111k
<b>ETHNICITY</b>	<b>WHITE</b>	73%
	<b>HISPANIC</b>	9%
	<b>AFRICAN AMERICAN</b>	10%
<b>KIDS IN HH</b>	45%	70%
<b>BACHELOR DEGREE</b>	22%	35%
<b>VOC. DEGREE</b>	38%	64%

Base: Established Owners (n=82), Recent Buyers (n=418)  
 Miscellaneous Demographic Questions  
 QS1C.VOC\_YN. Have you ever completed a certificate or diploma from a vocational school, trade school, or apprenticeship program? This includes programs for skilled careers like automotive repair, plumbing, electrical work, carpentry, cosmetology, culinary arts, etc.



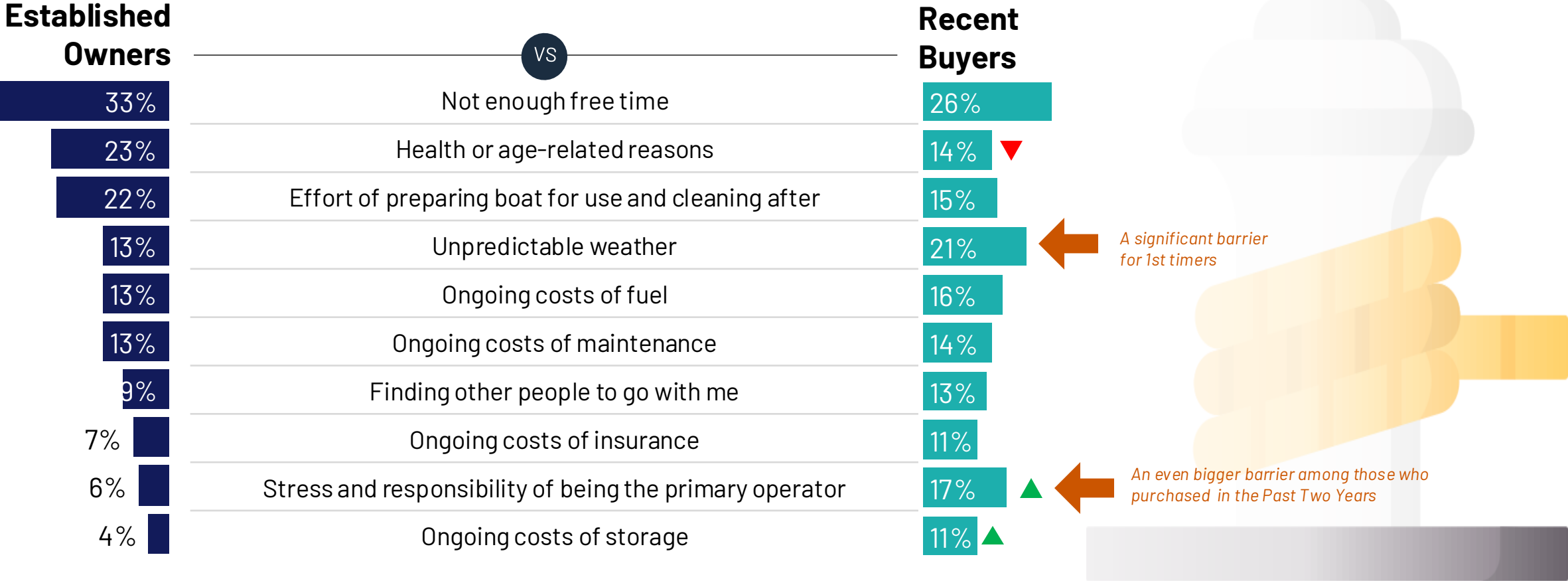
# Recent Buyers spend time in fresh and saltwater and do so more frequently than Established Owners. Recent Buyers also use their boat in various ways compared to Established Owners, who tend to fish and relax



Base: Established Owners (n=82), Recent Buyers (n=418)  
 QA0a. Thinking specifically about the main boating season (i.e., the warmer months when you typically use/used your boat), how often do/did you use your boat?  
 QA1. Where do/did you primarily use your boat?  
 QA4. Thinking about all the ways your boat is/was used (by you, your family, or friends), what are the activities it is/was typically used for?



# However, all boat owners experience barriers anchoring them to shore. For the Established Owner, the barriers are physical (health, effort), while Recent Buyers face more mental barriers (stress)



Base: Established Owners (n=82), Recent Buyers (n=418)  
 QD6. What prevents you from using your boat more often?



# A prevailing theme across all Boat Owners is 'the water gene,' suggesting that exposure and experience to boating and water correlate with ownership



## A Desire to be on the Water

Engagement with boats via charters and rentals jumps from **17% to 27%** among 2020 vs 2024 Buyers and is significantly higher among Prospects



## Boating-adjacent Activities

Such as paddle boarding, fishing, canoeing or kayaking are more common among Owners



## Outdoor Activities

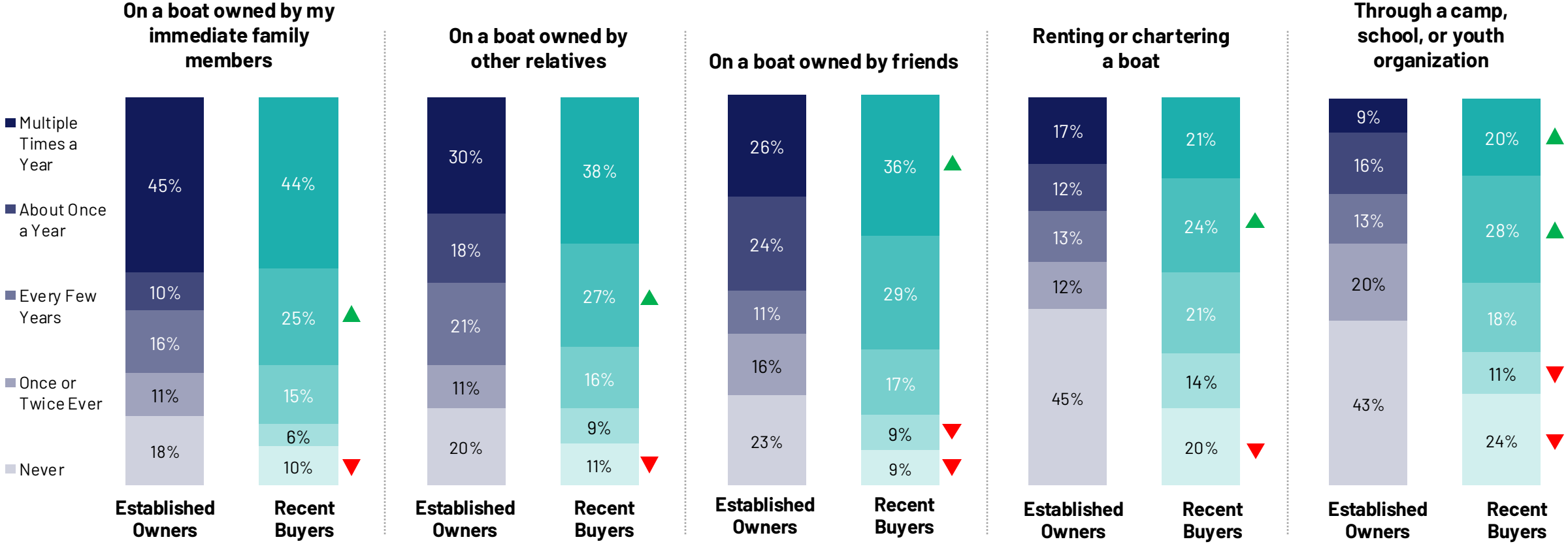
Specifically skiing, snowboarding, rock climbing, backpacking are more common among Owners



## Childhood Experiences

Buyers who purchased post 2020 are more likely to say they had **frequent exposure as a child** and have some of their **best memories on the water**

# But exposure to the water gene does not have to be through your immediate family nor childhood – it can also come from friends or outdoor recreation experienced throughout life, especially among Recent Buyers



Base: Established Owners (n=82), Recent Buyers (n=418)  
 QD3. Still thinking about your childhood and teenage years, how often, if at all, did you go boating in the following ways?



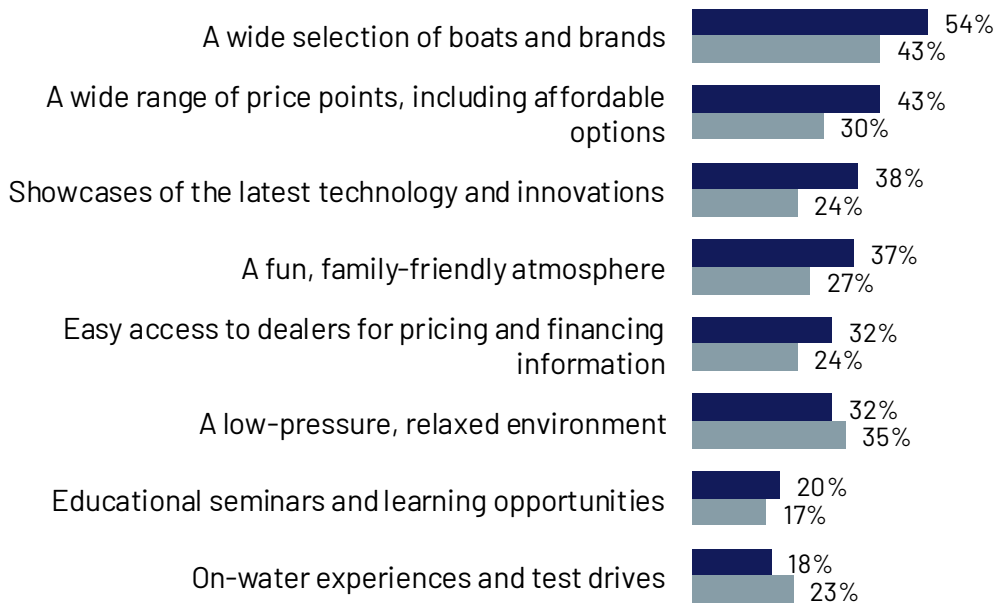
# As the consumer evolves, boat shows need to as well. They are no longer a place just for brokering deals, but an opportunity for enthusiasm, experience, and education

## BOAT SHOW ATTENDANCE / PERCEPTIONS AND WHAT IS WANTED FROM BOAT SHOWS



**63% of Established Owners have attended a boat show**

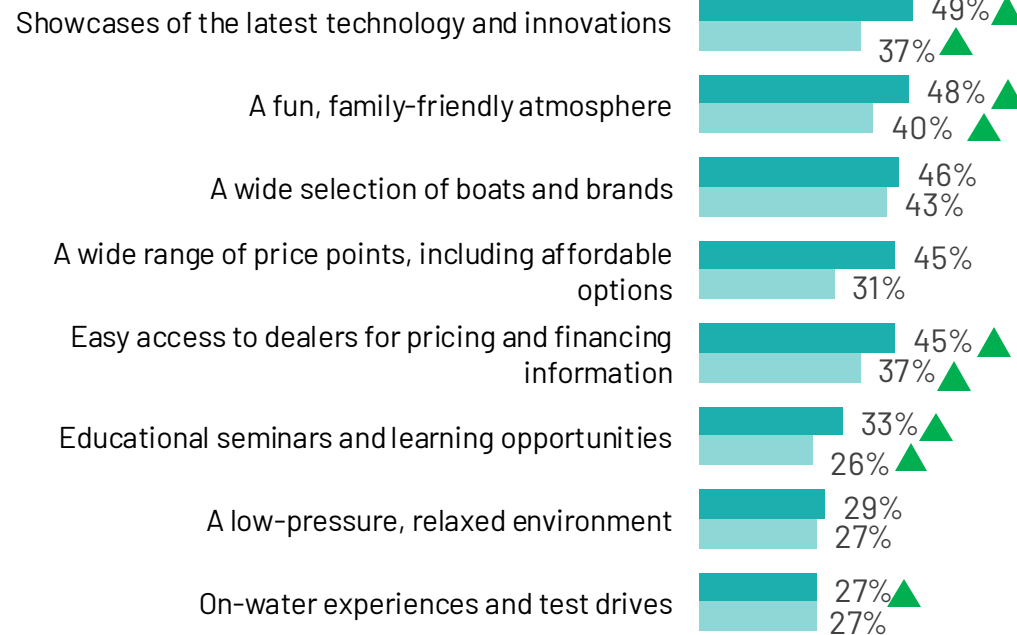
■ Perceptions  
■ Wants



**69% of Recent Buyers have attended a boat show**

About the same % of First Time Buyers have also attended

■ Perceptions  
■ Wants



Base: Established Owners (n=82), Recent Buyers (n=418)

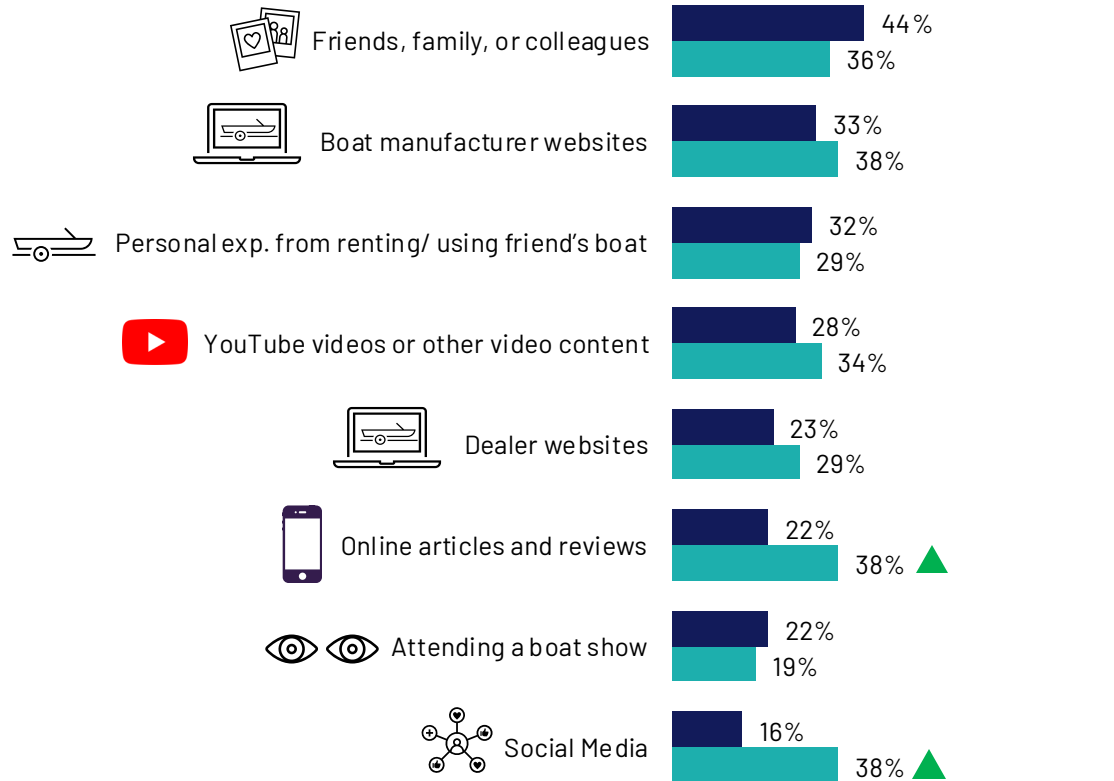
QC5. Have you ever attended a recreational boat show? C6. What is your overall perception of boat shows?

QC6b. And, now thinking about what would make a boat show most valuable to you, which of the following features or experiences are most important?

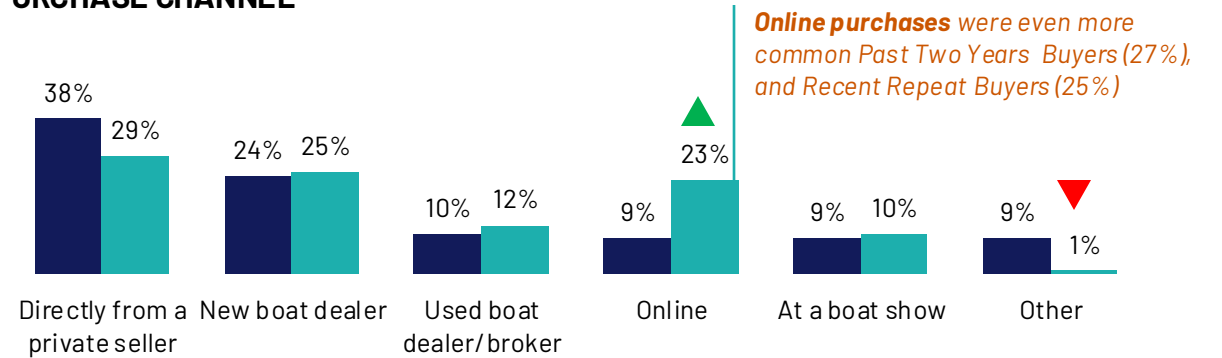
# The purchase journey has also fundamentally shifted from relationship-driven to digital-driven, with Recent Buyers using an array of online content for research

## INFLUENTIAL RESOURCES

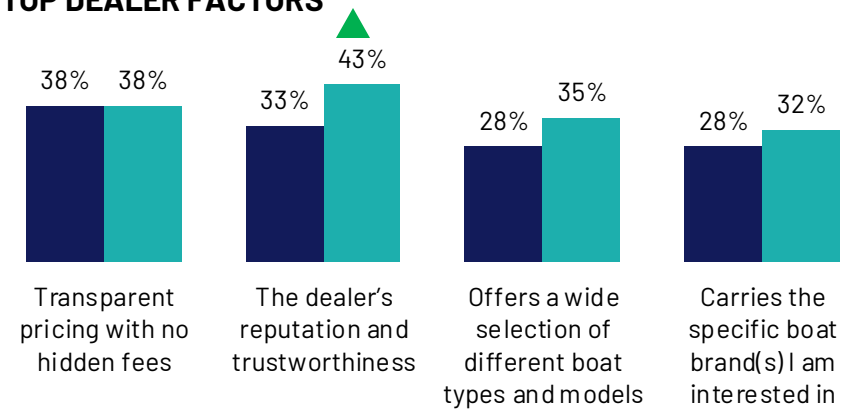
■ Established Owners  
■ Recent Buyers



## PURCHASE CHANNEL



## TOP DEALER FACTORS



*Past Two Years Buyers are looking a dealer that has the **specific boat brand** they are looking for (41%) vs. 27% among Less Recent Buyers.*

Base: Established Owners (n=82), Recent Buyers (n=418)

QC1. Where did you purchase your / would you plan to purchase your boat?

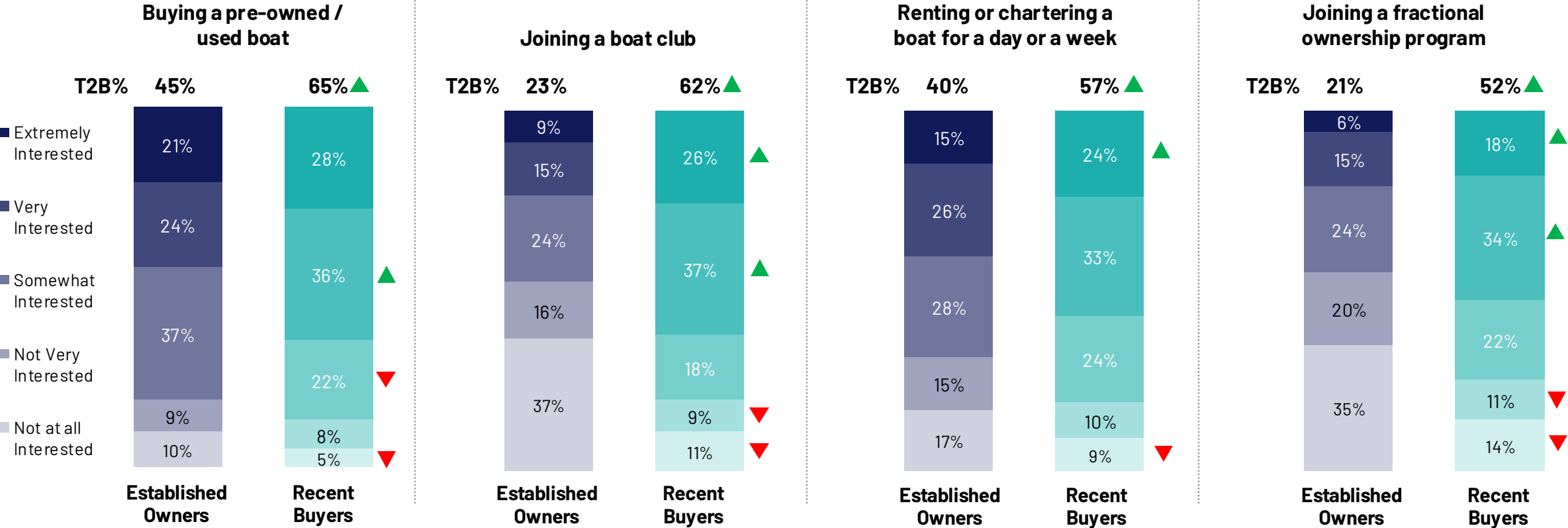
QC3. When researching a potential boat purchase, which of the following resources are most influential to you?

QC4. And when it comes to choosing a specific dealer or seller, which of the following factors are most important in your decision?

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▲ ▼ Indicates statistically greater or less than Established Owners at 90% confidence

# For Recent Buyers, boat clubs and fractional ownership are attractive alternatives to owning a boat

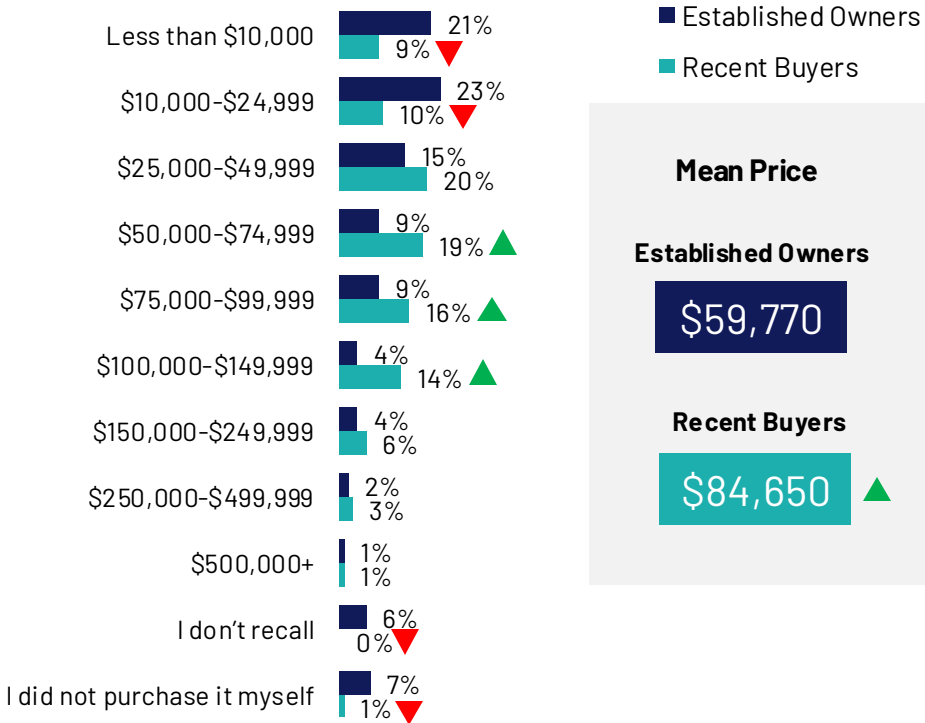


Base: Established Owners (n=82), Recent Buyers (n=418)  
 QC8. How interested are you in the following alternatives to traditional boat ownership?

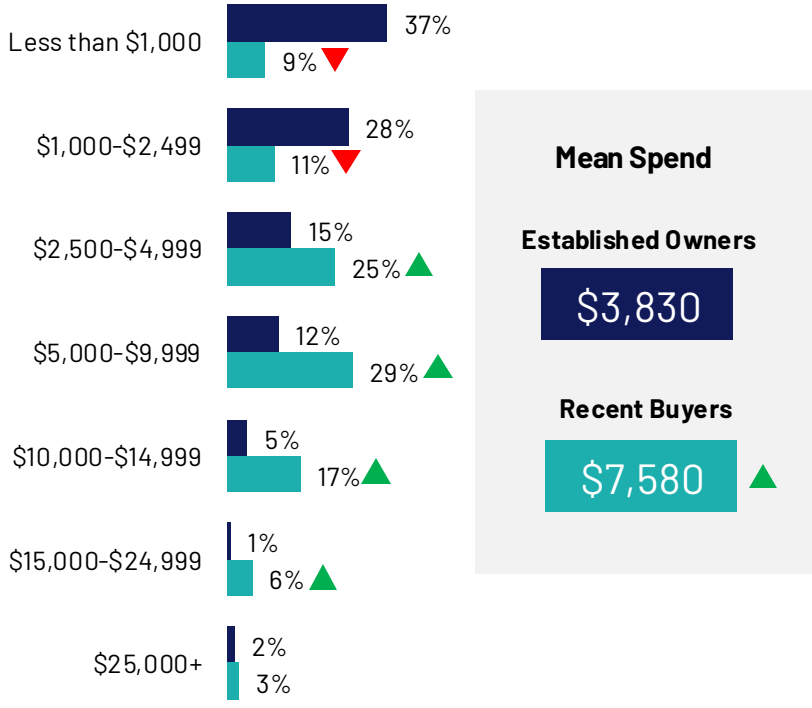


# The increased price of boat ownership is evident with Recent Buyers spending almost 30% more on a vessel in the past 5 years, and over double annually

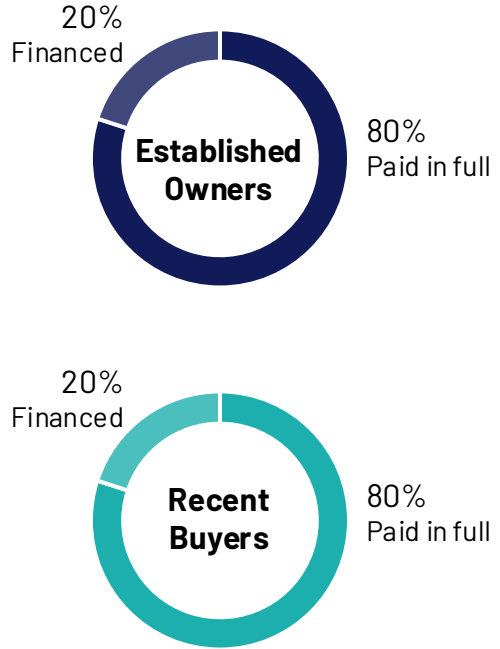
## PURCHASE PRICE



## ANNUAL SPEND



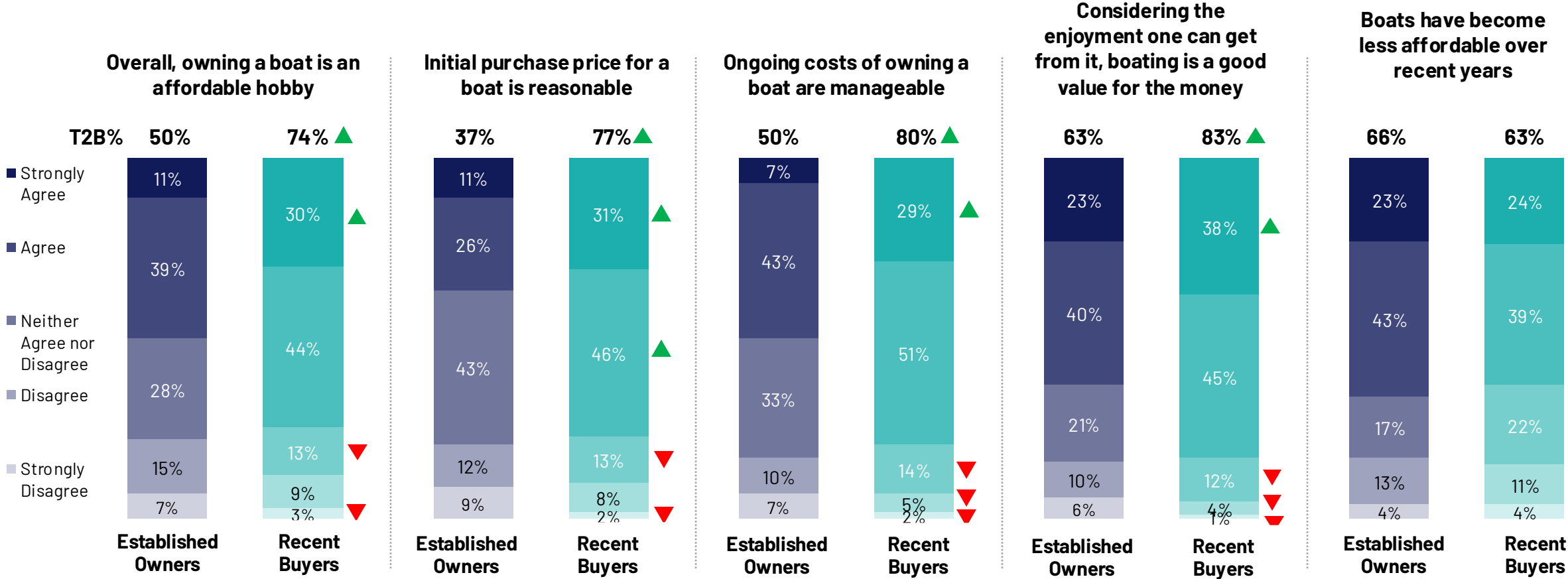
## HOW PURCHASED



Base: Established Owners (n=82), Recent Buyers (n=418)  
 QA8. Thinking about when you acquired your [INSERT H5 PRIMARY BOAT], what was its approximate purchase price?  
 QA9. Excluding the initial boat purchase, how much do/did you spend annually on your boating lifestyle (e.g., fuel, insurance, maintenance, storage, etc.)?  
 Base: Recall Where Boat Was Purchased Established Owners (n=76), Recent Buyers (n=413) QC2. How was your boat purchase paid for?



# Despite spending more, Recent Buyers tend to perceive boating more affordable than Established Owners, suggesting either inexperience or financial readiness

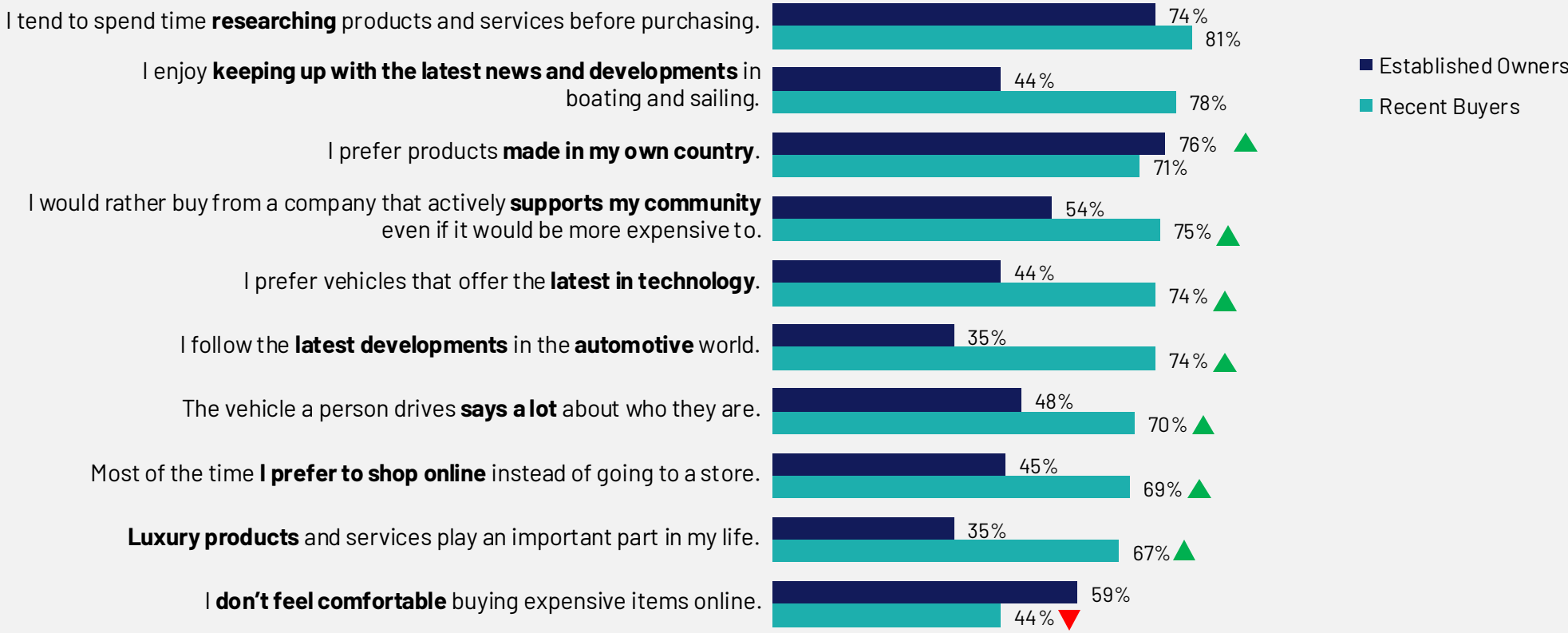


Base: Established Owners (n=82), Recent Buyers (n=418)  
 QC6c. Please indicate how much you agree or disagree with the following statements.



# Recent Buyers prioritize knowing and having the 'latest and greatest', more so than Established Owners, and demonstrate significant comfort buying online

## PERSONAL ATTITUDES -T2B% (Definitely/Tend to Agree)-

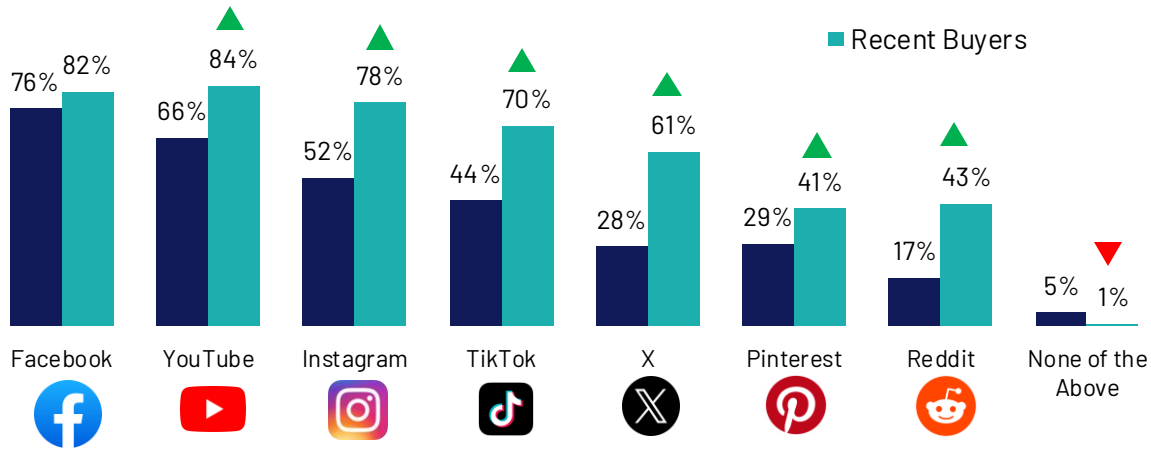


Base: Established Owners (n=82), Recent Buyers (n=418)  
 QFS1\_QAB1. For each of the following statements, please select the box that indicates the extent to which you, yourself, agree or disagree with that statement.

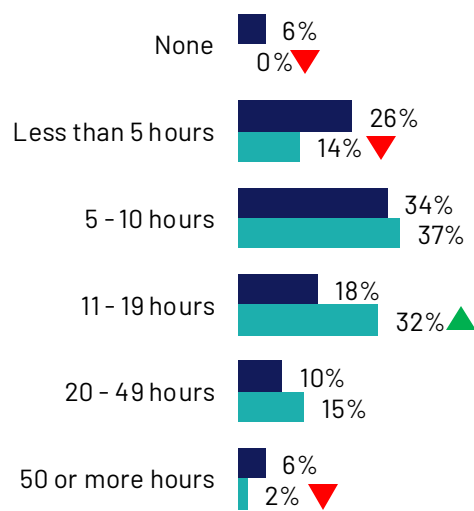


# In addition to comfort buying online, Recent Buyers are generally more 'online' than Established Owners – especially on social media

## SOCIAL MEDIA USAGE

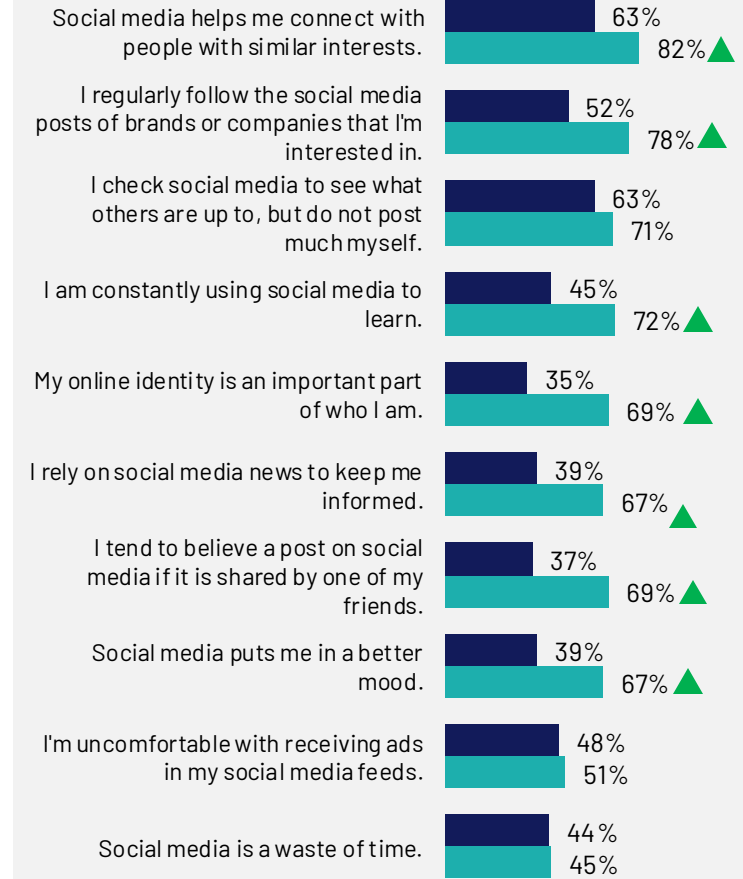


## HOURS PER WEEK

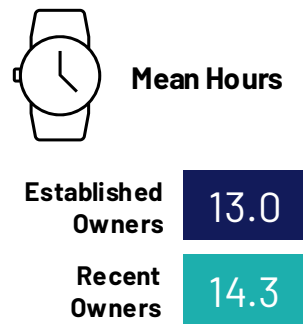
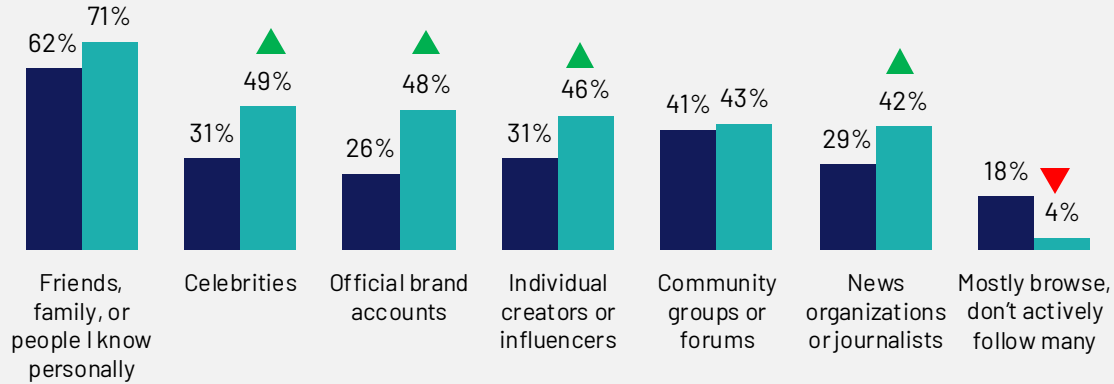


## SOCIAL MEDIA ATTITUDES

-T2B% (Definitely/Tend to Agree)-



## ACCOUNT TYPES FOLLOW



Base: Established Owners (n=82), Recent Buyers (n=418)

Q3. Which of the following social media platforms do you personally use on a regular basis? QMU16. For each of the following statements about your attitudes and opinions about social media, please select the box that indicates the extent to which you, yourself, agree or disagree with that statement. QMU17. In an average week, how many hours in total do you, yourself, spend on social media?

Base: Social Media Users Established Owners (n=78), Recent Owners (n=413) Q4. Thinking about the accounts you follow on social media in general, which of the following types of accounts do you typically follow?

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▲ ▼ Indicates statistically greater or less than Established Owners at 90% confidence



# PROSPECTIVE BOAT OWNERS



# Now, let us look at Prospective Owners...



## CURRENT OWNERS

People who currently own at least one boat

**ESTABLISHED OWNERS**

Purchased their main boat **prior** to 2020

**RECENT BUYERS**

Purchased their main boat **after** 2020

Focus for..



Dealers Manufacturers Discover Boating



## PROSPECTIVE OWNERS

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

-----REACH & INSPIRE -----ENGAGE -----CONVERT-----

**COST-CONSCIOUS**

Interested, but are not as financially ready; open to alternative access models

**TIME-PRESSED**

Core barrier is lack of time; open to alternative access models

**INEXPERIENCED**

Have the means, but feel they need more experience, support and knowledge

**SALES READY**

Fewest barriers experienced; ready to buy

Focus for..



Discover Boating

Focus for..



Discover Boating

Focus for..



Dealers Manufacturers

Focus for..



Dealers Manufacturers



Discover Boating  
(Hand Raisers)

**There are 3 key themes that represent the fundamental mindset of the Prospective Owner; understanding these can help prepare for tomorrow**

**1**

### **Financial Concerns**

Whether affluent or not, all prospects are concerned about their own particular financial situation and how boating can be affordable for them

**2**

### **Alternative Access**

For most prospects, there are appealing alternative models for gaining access to on the water experiences

**3**

### **New Purchase Journeys**

Similar to the changes observed among Recent Buyers, Prospects demonstrate interest and use of new touchpoints and key considerations for making a purchase

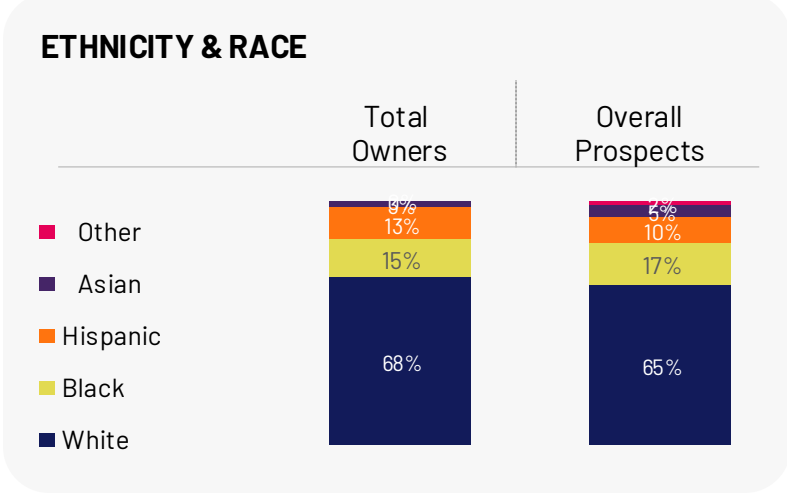
# Prospective Owners tend to be younger, have a lower income and are less educated than Current Owners, but have a similar distribution of discretionary income

**AGE**

	Overall Owners	Overall Prospects
18-24	14%	17%
25-34	27%	33% ▲
35-44	37%	27%
45-54	12%	10%
55-64	7%	10% ▲
65-75	3%	3%
Mean	38	37

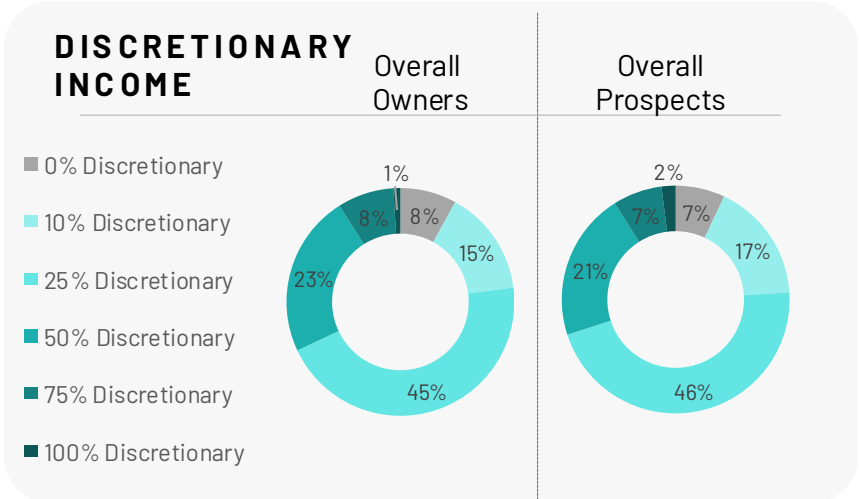
**EDUCATION**

	Overall Owners	Overall Prospects
% Less than Bachelors	42%	48%
% Bachelors Degree	33%	38% ▲
% More than Bachelors	25%	14% ▼

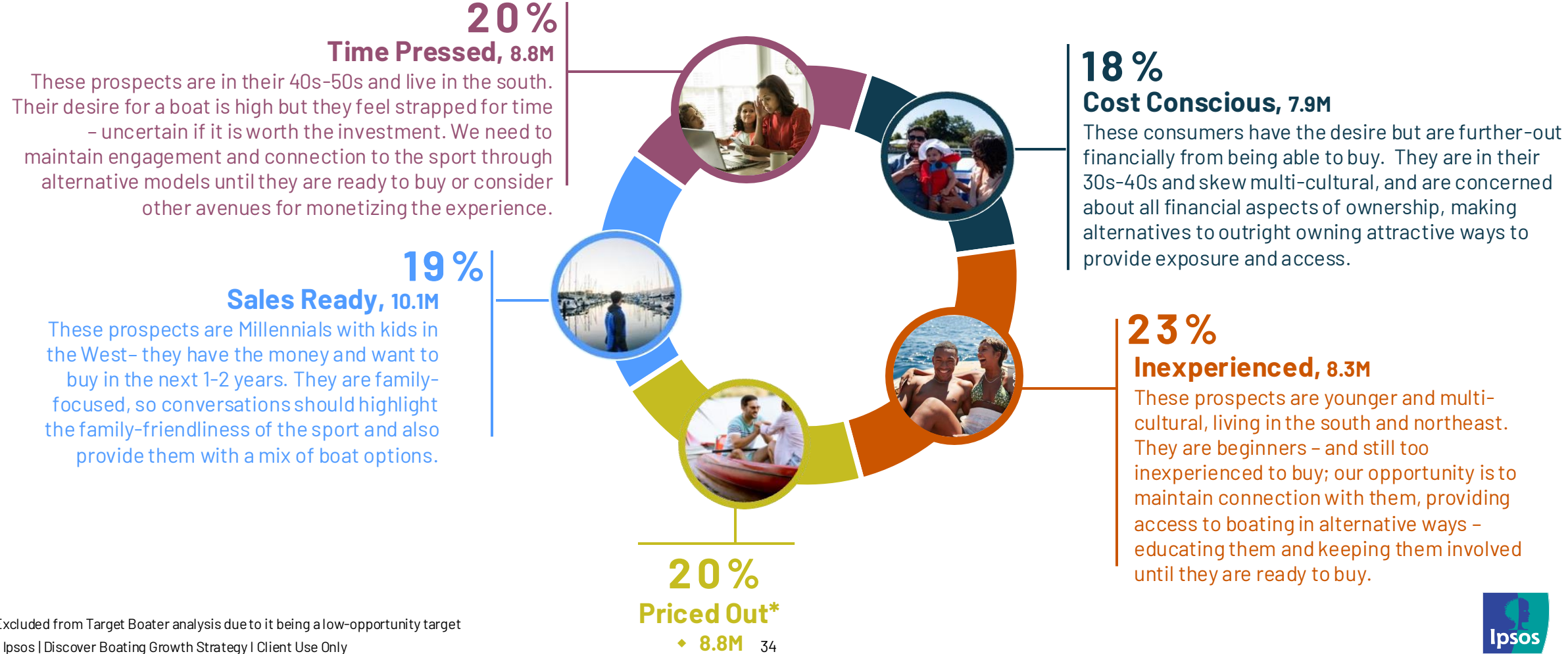


**INCOME**

	Overall Owners	Overall Prospects
Average	\$108k	\$73k ▼
Under \$75,000 (Net)	43%	58%
\$75,000-\$99,999 (Net)	22%	18%
\$100,000-\$149,999 (Net)	20%	16% ▼
\$150,000-\$199,999	9%	4% ▼
\$200,000-\$249,999	3%	1%



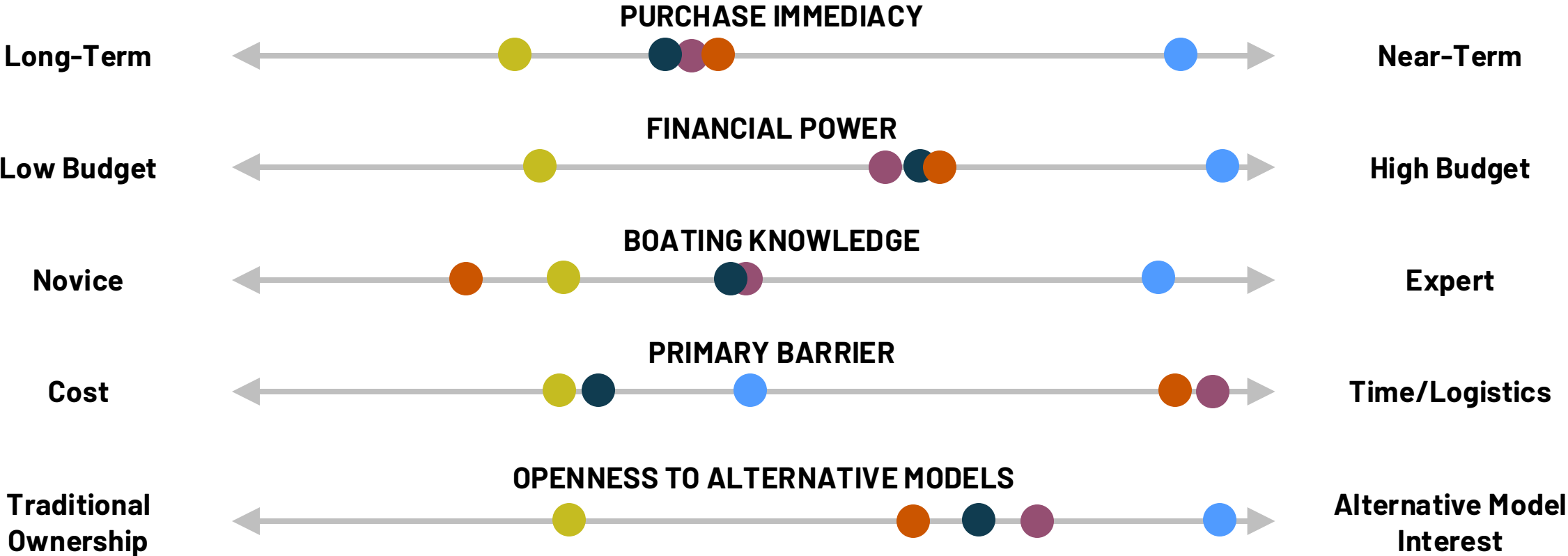
# We grouped Prospective Owners into 5 targets that highlight their different needs, knowledge, and barriers to boat ownership; of the 5, all except the 'Priced Out' target offer opportunities



\*Excluded from Target Boater analysis due to it being a low-opportunity target  
 © Ipsos | Discover Boating Growth Strategy | Client Use Only



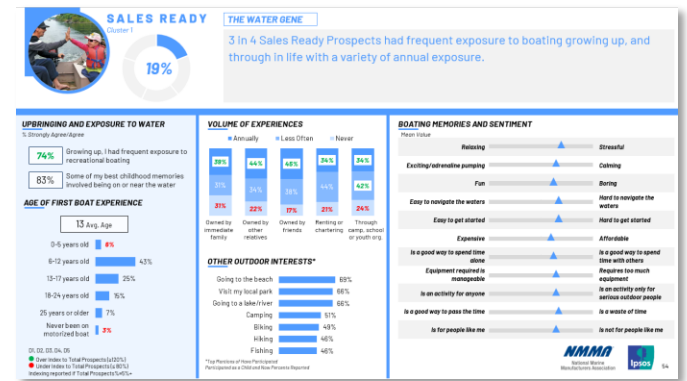
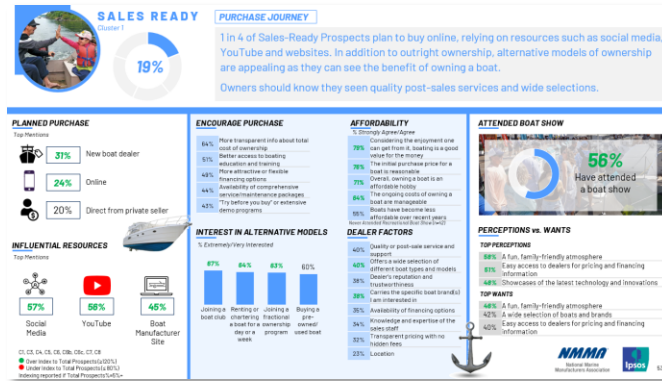
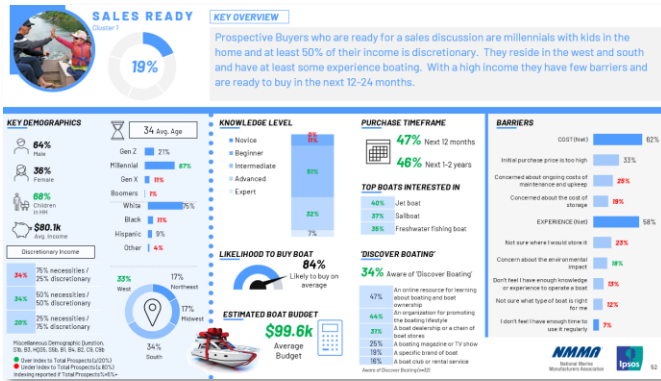
# Their needs, knowledge, and barriers to boat ownership are varied, influencing their purchase immediacy



Base: Cluster 1: Sales Ready (n=95), Cluster 2: Affordable Path (n=90), Cluster 3: Priced Out (n=100), Cluster 4: Need Guidance (n=113), Cluster 5: Timely Solve (n=102)  
 QS5b. And, when will you most realistically purchase this boat? QB1. What is your estimated total budget for the initial purchase of a boat?  
 QB3. How would you rate your own knowledge of boats? QB4. What are the main reasons or concerns that have prevented you from purchasing a boat so far?  
 QC8. How interested are you in the following alternatives to traditional boat ownership?



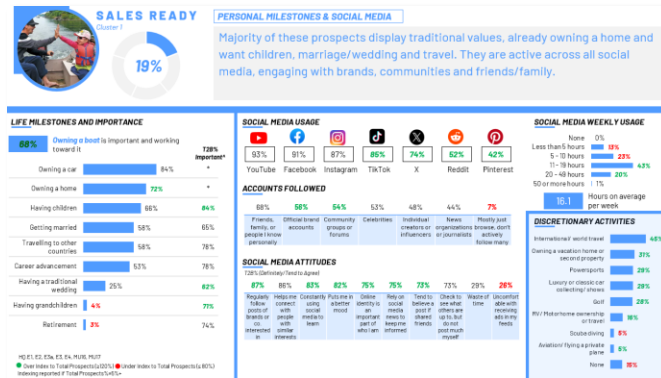
# In the appendix, you will find more details for each Prospective Owner



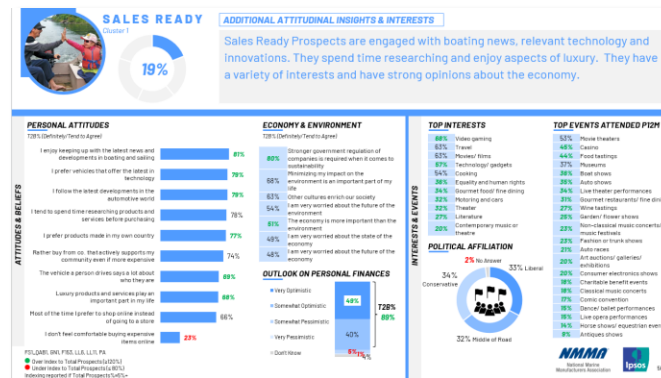
**Overview:** Demographics, budget, knowledge level, readiness and barriers to purchase

**Purchase Journey:** How and who they plan to buy from, information sources, purchase motivations, boat show perceptions, etc.

**The Water Gene:** Exposure to water, age of first boat experience, how often, outdoor interests, boating memories, etc.



**Milestones & Media:** Milestones achieved, and social media behavior usage & attitudes, etc.



**Attitudes & Insights:** General attitudes and values, top interests, etc.

\*Complete slides for all Prospective Owners Targets can be found in the appendix



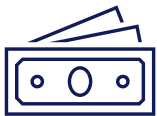
# TOMORROW'S LANDSCAPE: WHAT'S CHANGING IN THE WORLD?

How are the expectations and needs of these prospects likely to change in the next 3 years?

# The world has changed significantly in recent years, and will continue to shape the needs and expectations of consumers and our Target Boaters

We identified three key Macro Forces that will shape the world of tomorrow

01



**Economic  
Uncertainties**

02



**Social  
Reconfiguration**

03



**Tech-Celeration**

# These macro forces will also impact how consumers, and our Target Boaters, engage with the recreational boating category

## Macro Forces and its resulting Drivers of Change

### Economic Uncertainties



1. Increasing Cost of Living and Fragmented Labor Market
2. Economic Optimism and Luxury Spending
3. Changing Definition of Ownership

### Social Reconfiguration



1. Growing Diversity and Generational Shift
2. Value Reprioritization and Delay in Traditional Milestones
3. Mindful and Purposeful Living

### Tech-Celeration



1. Increased Digital Usage in All Aspects of Life
2. Openness to New Technology
3. Social Media as a Source of Influence

# With rising living costs and a fragmented labor market, consumers are growing more cautious with their spending



## Economic Uncertainties



**-7.2**

Decrease in points for **U.S. Consumer Confidence Index** as of March 2025, its lowest level since January 2021

*CBS News, March 2025*



**25%**

Percentage of U.S. adults who said they **spent more on experiences** in the past year vs. they did in the year before

*Morning Consult, 2025*



**42%**

Percentage of U.S. consumers who state **inflation as their main worry**, standing as the country's **most pressing concern**

*Ipsos What Worries the World, September, 2025*



**+\$7B**

Increase in the U.S. **resale and thrift market** (USD \$56 billion) up from ~USD \$49 billion in 2024, suggesting that consumers **seek for value in their purchases**

*Statista, 2025*

# Faced with economic uncertainty and inflation, consumers are actively redefining their priorities and shifting their spending patterns



## Economic Uncertainties: *What does it entail?*

### 1 Increasing Cost of Living and Fragmented Labor Market

With global economics driving up the **cost of everyday goods** and **housing prices** outpacing wage growth, U.S. consumers are feeling the **financial squeeze**, leading to **more cautious, value-driven spending habits** amidst an uneven job market.

### 2 Economic Optimism and Luxury Spending

**Financial realities** are fueling a widespread **“live for today” sentiment** where consumers, feeling powerless over their future, channel a **YOLO (You Only Live Once) mindset** into spending on **immediate experiential rewards** like travel and dining.

### 3 Changing Definition of Ownership

Access is overtaking ownership as consumers **rethink what it means to “have” something**. From rentals to subscription models, **low-commitment flexibility** (cost, time, energy) and **convenience** now define modern value over ownership, driven by new economic and social pressures.

# Amidst the financial pressure, adjusted consumer spending is fueling the demand for accessible, experience-driven boating



## Economic Uncertainties: *What does this mean for all Target Boaters?*

### 1 Increasing Cost of Living and Fragmented Labor Market

As rising costs and job insecurity squeeze discretionary income, **new boat sales are softening** as consumers become **highly selective**. Boat buyers may prioritize value and utility as they look to maximize every dollar they spend..

### 2 Economic Optimism and Luxury Spending

As financial constraints push consumers to **prioritize rewarding experiences** over large asset purchases, the success of the boating industry will depend on **strategically repositioning** boating as an **attainable luxury** and emphasizing the **instant gratification on the water**.

### 3 Changing Definition of Ownership

As consumers seek **low-commitment flexibility** and **convenience, shared-service models** open a new gateway to boating, providing **accessible time on water** without the significant **financial** and **logistical commitment of ownership**.

# Beyond financial pressures, consumer behavior is also being reshaped by a more diverse America and shifting personal values



## Social Reconfiguration



**7**  
States

California, Hawaii, New Mexico, Texas, Nevada, Maryland, Georgia now have no racial or ethnic group forming a majority, signaling a **“majority-minority” dynamic**

*The World Data, October 2025*



**85%**

Percentage of purchasing decisions women influence, with **women’s median discretionary spending** up 0.9% year-over-year, outpacing men and underscoring their growing economic power

*Bank of America, Capital One, 2025*



**-24%**

Drop in 25-to-34-year-olds (vs. 1975) who achieved **four most common milestones** (moving out of parents’ home, working, married, with children), reflecting a bigger focus on **economic security**

*United States Census Bureau, 2025*



**58%**

Percentage of US and Canadian consumers who said they would **pay more** for products and services that are **ethical** and **sustainable**

*Ipsos Conscious Consumer Report, 2025 Edition*



# Growing diversity and changing life priorities are reshaping how Americans define identity, success, and their well-being



## Social Reconfiguration: *What does it entail?*

1

### Growing Diversity with Generational Changeover

America is undergoing a **demographic transformation**, driven **by generational shifts, increasing diversity, and international and urban migration**. Gen Z and Millennials are actively reshaping cultural norms around **identity, representation, and inclusion**.

2

### Value Shift & Delay in Traditional Milestones

Consumers, especially those who are younger, are redefining **success and stability**. They are delaying **marriage, homeownership, and parenthood** in favor of **financial security, personal growth, and flexibility**.

3

### Mindful Living and Spending

Consumers are becoming more **intentional about how they spend their time, money, and energy**, seeking products and experiences that align with their **health, ethics, and environmental values**.

# The changing values and lifestyles present new avenues for boating to become more diverse, mindful, and inclusive across generations



## Social Reconfiguration: *What does this mean for all Target Boaters?*

1

### Growing Diversity with Generational Changeover

The generational and demographic shift is redefining today's boater from a traditional owner to a **diverse** and **digital consumer**. It is reshaping the industry to pivot towards lowered **skill barriers**, **urban access**, and to authentically **champion diversity to capture the new growing market**.

2

### Value Shift & Delay in Traditional Milestones

While delayed milestones **free up discretionary income**, this capital is less likely to translate into outright boat purchases. Instead, the consumer demand for **financial security** and **flexibility** is transforming the boating market, creating a **structural shift** from a **focus on boat ownership** to one centered on **financial agility** and **flexible access models**.

3

### Mindful Living and Spending

As consumers favor lifestyles prioritizing **emotional well-being** and **restorative experiences**, recreational boating can be repositioned as a way of **"blue therapy"** that offers **mental clarity**, **sensory restoration**, and **sense of calm**.

# Technology has become essential to consumers' lives, yet remains a double-edged sword of innovation and apprehension



## Tech-Celeration



89%

Percentage of U.S. adults who say they are **comfortable adapting new technology in daily life**, suggesting that using **technology has become second nature**

*Ipsos Insights Hub, 2025*



42%

Percentage of U.S. consumers who **used phones** as part of their **latest retail purchase**, suggesting that phones have become **central to the shopping experience**

*Visa's Global Digital Shopping Index: US Edition, 2025*



53%

Percentage of Gen Z who say **social-video content** is **more relevant** to them than traditional video content, with 50% saying they **feel stronger connection to social-media creators** than actors on TV

*McKinsey's State of the Consumer 2025*



64%

Percentage of U.S. adults who say that **products and services using AI make them nervous**, while only 38% say it makes them excited

*The Ipsos AI Monitor 2025*



# The rapid integration of AI is driving changes in how consumers perceive technology and what they expect to get from it



## Tech-Celeration *What does it entail?*

1

### Increased Digital Usage

Digital tools are now **seamlessly integrated into every facet of consumer life**, creating an **expectation for instant, mobile access** for everything from **communication and transactions** to **information gathering** via smart devices and apps.

2

### Openness to New Technology

As technology becomes woven into daily life, consumers are more willing to **adopt it across work, leisure, health, and home**. **Growing comfort** is speeding up adoption, and **expectations for efficiency** and **personalization** are rising, though **trust concerns** remain.

3

### Social Media as a Source of Influence

Social platforms have evolved into **powerful discovery engines**, shaping opinions and driving purchases. **Authenticity, creator credibility, and community validation** now matter more than traditional advertising. Consumers are increasingly **relying on peers, influencers, and independent creators** to make sense of the world around them.

# Consumer demand for accessible boating brings the need for the industry to effectively balance digital utilization with authenticity



## Tech-Celeration *What does this mean for all Target Boaters?*

### 1 Increased Digital Usage

The **pervasive use of digital tools** creates a consumer expectation for a **seamless digital journey across all touchpoints**, from **initial research** to the **moment of purchase and ownership**. Consumers now demand a **fully connected** and **intuitive** experience, from online platforms to the moment they are on the water.

### 2 Openness to New Technology

As digital technology rapidly evolves, consumers (especially younger generations) are seeking a boating experience that **integrates technology to solve friction points** (e.g., assisted docking, intuitive navigation) and helps make the experience **safer, easier, and more accessible**.

### 3 Social Media as a Source of Influence

Social media has evolved into a primary channel where consumers go for product information, serving as a **key source of inspiration, education, and sales** for boating. It is now a platform where **authentic storytelling** can be strategically used to **connect the industry with the consumer base**.

# IMPLICATIONS FOR TARGETS

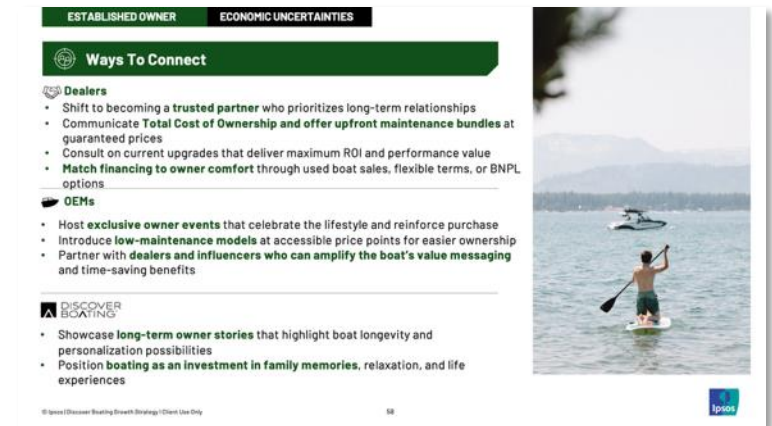
What do these Macro Forces mean for our Targets and how we connect with them?



# What you will find in the futureproofing profiles

To understand how to better connect with our Target Boaters in the next 3 years, we analyzed each prospective boater target through the lens of the Macro Forces

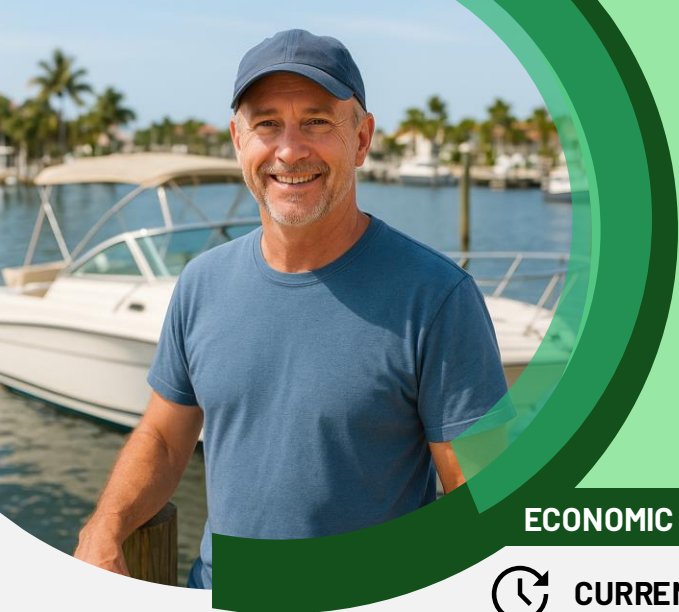
Each futureproofing profile features:



**Target Overview:** One-page snapshot for each target, showing selected survey data points organized by how they align with each of the three macro forces

**Target x Macro Force Analysis:** Likely impact of a macro force on each target – how each target consumer behaves and what it means for tomorrow

**Ways to Connect:** Actionable recommendations detailing who acts (DB, Dealers, OEMs), what to do, and how to engage the target boater, for each Macro Force



# Established Owner



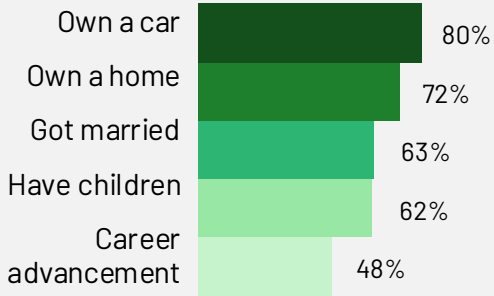
Avg. age 45 y.o.	White 73% Hispanic 10% Black 9%	Male 56% Female 44%	Bachelor Degree 22%	Kids in HH 45%	Avg. Income \$96k	Avg. time on social media 13.0 hours

I seek **relaxation** and **family time** from boating. I am **less open** towards today's changing landscape, such as alternative models for boating, digital scene, or environmental responsibility. I value **ownership** over experience and rely on **people around me** for resource.

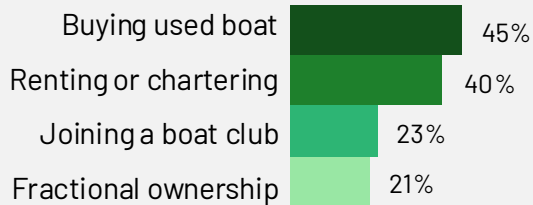
## ECONOMIC UNCERTAINTIES

CURRENT OUTLOOK ON...

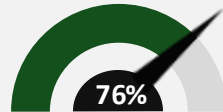
### LIFE ACCOMPLISHMENTS



### TRAD. vs ALT. MODELS

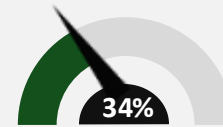


### PERSONAL FINANCES



### STATE OF ECONOMY

Neutral/Not worried



### PURCHASE LIKELIHOOD



Likely to buy on average

## SOCIAL RECONFIGURATION



### MINDFUL LIVING



Minimizing impact on the environment is important (55%)



Buy from a company that supports my community even if it would be more expensive to (54%)



### TOP DISCRETIONARY ACTIVITY

35%  
Own a vacation home or second property



### EMOTIONAL ASSOCIATIONS

Low Agreement High Agreement

#### Sense of relaxation



#### Sense of adventure and excitement



### FUNCTIONAL ASSOCIATIONS

#### Spend quality time with family



#### Spend quality time with friends



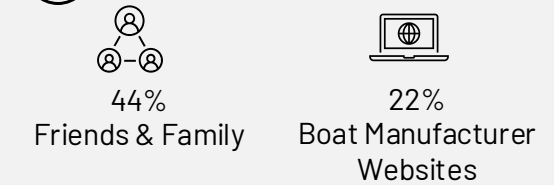
#### Be in nature/outdoors



## TECH-CELERATION



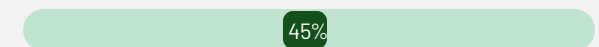
### SOURCES OF INFLUENCE



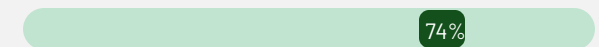
### DIGITAL ATTITUDES

Low Agreement High Agreement

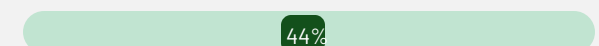
#### Prefer to shop online instead of going to a store



#### Research products/services before purchasing



#### Preference for vehicles that offer latest in tech



#### Keep up with latest news and developments in boating and sailing





## How The World Is Changing



Global economic pressures are fueling **cautious, value-driven spending** while simultaneously driving a “-Live-Once” mindset focused on **immediate experiential rewards**.



## What We're Seeing With This Target

- **Relatively lower positive financial outlook and perception compared to Recent Buyers**
- Older in age
- Less likelihood to buy compared to Recent Buyers
- Achieved life milestones (house, marriage, kids) which indicates they are in a **phase of high financial commitment and have other life priorities**
- **Preference for traditional ownership** over shared services models



## What This Means

- **Economic uncertainty deters new purchases** when competing with commitments like mortgages and children's tuition
- Define **affordable boating exclusively through ownership** rather than renting or shared models
- Open to financing service, repairs, or upgrades if value proposition extends boat life



## Ways To Connect



### Dealers

- Shift to becoming a trusted partner who prioritizes long-term relationships
- Communicate Total Cost of Ownership and offer upfront maintenance bundles at guaranteed prices
- Consult on current upgrades that deliver maximum ROI and performance value
- Match financing to owner comfort through used boat sales, flexible terms, or BNPL options

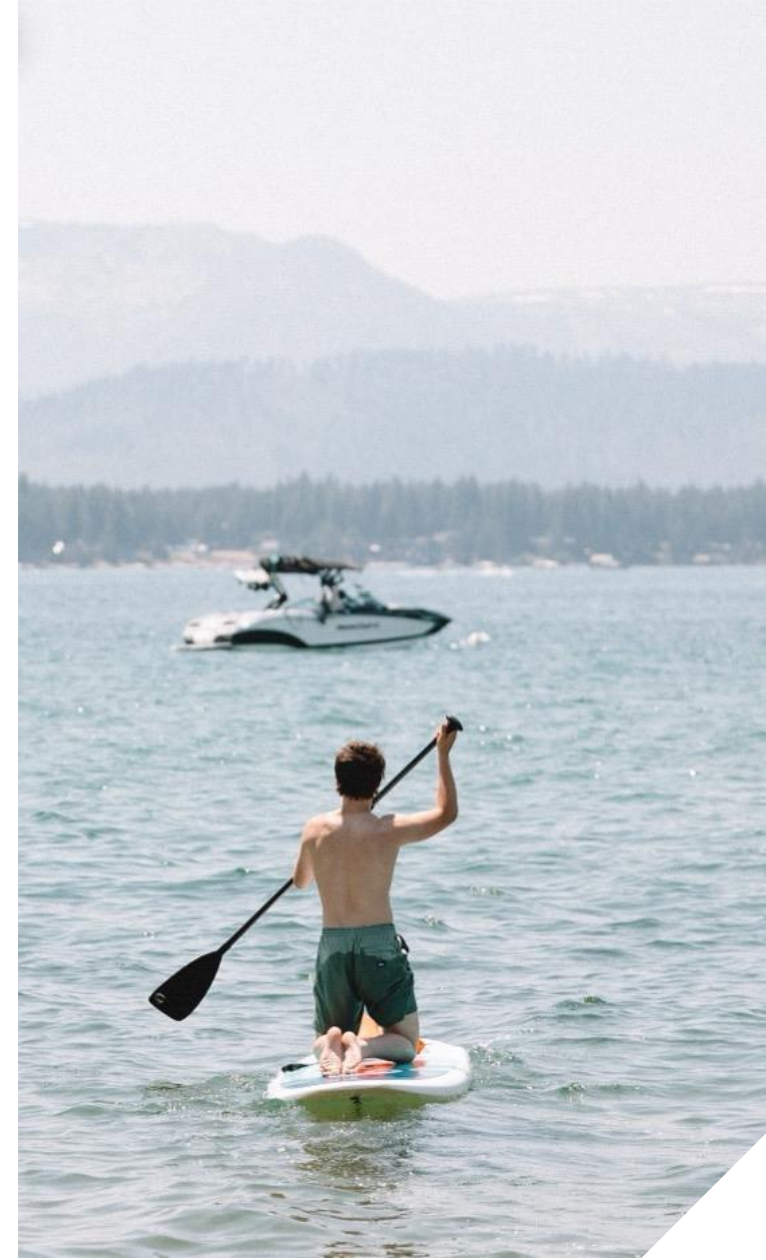


### Manufacturers

- Host **exclusive owner events** that celebrate the lifestyle and reinforce purchase
- Introduce **low-maintenance models** at accessible price points for easier ownership
- Partner with **dealers and influencers who can amplify the boat's value messaging** and time-saving benefits



- Showcase long-term owner stories that highlight boat longevity and personalization possibilities
- Position boating as an investment in family memories, relaxation, and life experiences





## How The World Is Changing



Driven by **generational and demographic shifts**, America is seeing **cultural norms** being redefined around identity and inclusion.

Younger consumers are delaying major milestones in favor of **financial security and flexibility**, becoming intentional spenders who prioritize products and experiences aligning with their **health, ethical, and environmental values**.



## What We're Seeing With This Target

- **Traditional demographics** (skew older, white), with preference for home ownership over experiences
- Around average consensus that reducing environmental impact matters
- Core motivations are centered around **relaxation, family, and nature**



## What This Means

- Industry pivot towards more diverse consumers and urban access **may be less relevant to them**
- Core motivations are well aligned with industry's messaging around **"blue therapy"**, focused on **emotional well-being**
- While not the primary drivers of ethical and environmental values, they are aware of their role as stewards of environment
- View **boat shows as an extension of validating the sense of relaxation** they seek from boating



## Ways To Connect



### Dealers

- Host small, local, family-focused gatherings (e.g., dock parties) that build a sense of exclusive, close-knit community that create opportunities for owners and their friends & families to connect
- Clearly present boat options tailored to their desire for experiences that include relaxing time in nature, with family, and being outdoors

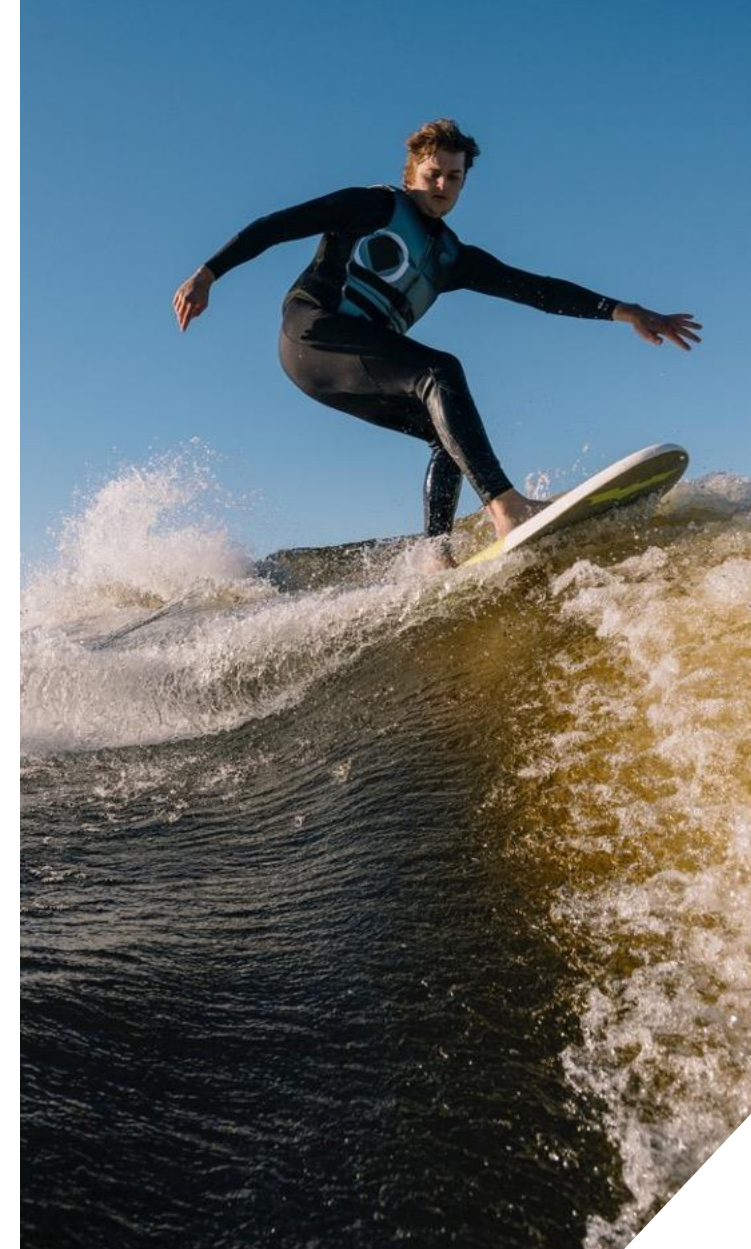


### Manufacturers

- Offer services and features that cater to **multi-generational use** (e.g., open layouts, accessibility features, new electronics or accessories)
- Ensure product communication continues to emphasize the **practical utility, family experiences, and time in nature** that established owners value most



- Develop content and videos that tie back to their core motivations (e.g., relaxing time in nature, with family, and being outdoors)
- Position boating as a meaningful way for the next generation to connect with nature
- Develop owner spotlight campaigns that highlight personal stories around family traditions, favorite cruising routes, and the restorative value of time on the water
- Design boat show experiences to feel low-pressure, relaxed, and owner-centric





## How The World Is Changing

Digital tools are now seamlessly integrated into consumer life, driving an expectation for **instant, mobile access** and **increased adoption** across all sectors.

This has elevated expectations for **efficiency** and **personalization**. Social platforms have also evolved into **powerful discovery engines** where **community validation** now drive purchases and shape opinions more than traditional advertising.



## What We're Seeing With This Target

- **Low engagement** with social media and reliance on traditional sources
- **Friends and family play a big role in source of influence**, and prefers them over other online resources or boat manufacturer's website
- Likely to **research** products and services before purchasing
- More likely to **shop in store** than online
- **Less inclined to be enticed by the latest and greatest in tech**, even in boating



## What This Means

- **Digital friction** can deter boat purchases
- May miss out on product information and inspiration as it becomes **harder to reach through primary social channels**
- More likely to be **influenced by community** and validated experiences from peers than digital channels
- Advanced boat features are **not a priority** for them

Note: Analysis drawn from expanded survey questions beyond data shown on the slide before. More data for each Cluster can be found in the appendix



## Ways To Connect



### Dealers

- Provide a consistent, seamless experience across digital and physical channels, ensuring all critical product information is easy to find wherever customers engage
- Assess their digital comfort level and offer personalized, one-on-one training to help them navigate the new tech features on boats in a meaningful way



### Manufacturers

- Develop **standardized digital assets** (e.g., video tutorials, interactive calculators) for dealers to use in the research phase of the purchase journey
- **Position new boat tech features** as enablers of efficiency, safety, and connectivity
- Provide **Word-of-Mouth referral programs** that reward established owners for bringing in friends or family










- Do not underestimate the continued importance of trusted, non-digital channels such as in-person events, magazines, direct mail, personalized emails, and dealerships
- Leverage the power of existing owners by hosting events such as owner testimonials that introduce people into boating





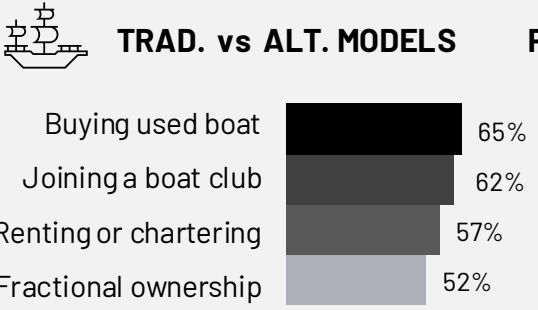
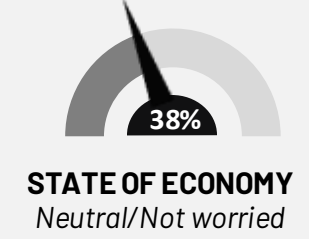
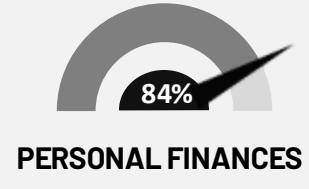
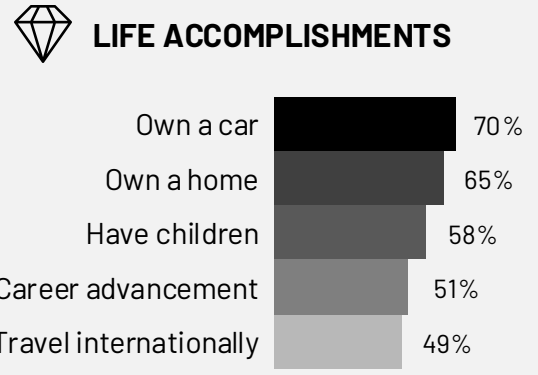
# Recent Buyers

						
Avg. age 36 y.o.	White 67% Black 16% Hispanic 24%	Male 64% Female 36%	Bachelor Degree 35%	Kids in HH 70%	Avg. Income \$111k	Avg. time on social media 14.3 hours

I seek for both **relaxation** and **adventure** from boating. I am **more open** towards today's changing landscape, such as **alternative models** for boating, **digital scene**, or **environmental responsibility**. I am more heavily **influenced by social media** and online than people around me.

## ECONOMIC UNCERTAINTIES

### CURRENT OUTLOOK ON...



## SOCIAL RECONFIGURATION

### MINDFUL LIVING

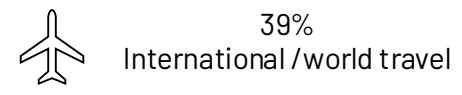


Minimizing impact on the environment is important (74%)



Buy from a company that supports my community even if it would be more expensive to (75%)

### TOP DISCRETIONARY ACTIVITY



### EMOTIONAL ASSOCIATIONS



Sense of relaxation 33%

Sense of adventure and excitement 33%

### FUNCTIONAL ASSOCIATIONS

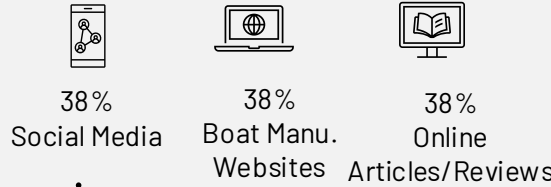
Spend quality time with family 39%

Spend quality time with friends 33%

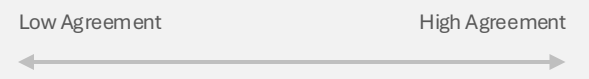
Be in nature/outdoors 29%

## TECH-CELERATION

### SOURCES OF INFLUENCE



### DIGITAL ATTITUDES



Prefer to shop online instead of going to a store 69%

Research products/services before purchasing 81%

Preference for vehicles that offer latest in tech 74%

Keep up with latest news and developments in boating and sailing 78%



## How The World Is Changing



Global economic pressures are fueling **cautious, value-driven spending** while simultaneously driving a “-Live-Once” mindset focused on **immediate experiential rewards**.



## What We're Seeing With This Target

- **Relatively positive financial outlook** and perception (higher than Established Owners)
- Prioritize traditional milestones like parenthood, while also **valuing career advancement and international travel**
- **Higher likelihood to purchase** compared to Established Owners, but also **open-minded towards alternative models**



## What This Means

- Despite their relatively positive outlook, economic pressure **may impact financial confidence** and make them hyper-aware of the Cost of Ownership, requiring them to find **justification for their investment**
- Will expect the boat to deliver **high-reward, low-hassle experiences**, whether they're investing in a new purchase or exploring shared-access options
- Likely to be **early adopter of changing access models**

Note: Analysis drawn from expanded survey questions beyond data shown on the slide before. More data for each Cluster can be found in the appendix



## Ways To Connect



### Dealers

- Improve transparency through clear service and maintenance plans that offer a fixed, predictable cost for routine maintenance
- Increase touchpoints with recent buyers to reinforce confidence in their vessel and maintenance plan, offering advice and reassurance—including guidance on used boats and alternative models when appropriate



### Manufacturers

- Leverage loyal owners as **brand advocates and micro-influencers**, turning their **experiences into authentic touchpoints** to engage recent buyers before and after their purchase
- **Offer transparent pricing, flexible financing options, and strong warranties** to make purchase process feel more manageable



- Offer educational content and guidance on how different boat models can enable new experiences, encouraging owners to explore ways to enjoy boating beyond what they currently have





## How The World Is Changing



Driven by **generational and demographic shifts**, America is seeing **cultural norms** being redefined around identity and inclusion.

Younger consumers are delaying major milestones in favor of **financial security and flexibility**, becoming intentional spenders who prioritize products and experiences **aligning with their values**.



## What We're Seeing With This Target

- **More diverse** in **demographics** (higher share of Hispanics, Black compared to the Established Owners)
- Values **sustainability** and **environmental responsibility**
- **High willingness to pay more** for brands that **align with their values**
- Views boating as **balanced mix** of relaxation, adventure, and social connection



## What This Means

- Likely to **expect greater diversity** in marketing, boating communities, and dealership representation
- Messages **highlighting sustainability, local community impact**, and **ethical practices** serve as key differentiators
- Core motivations align closely with the **industry's "blue therapy" messaging**, emphasizing emotional well-being



## Ways To Connect



### Dealers

- Place greater emphasis on cultural competency for staff training, and look to reflect the growing diversity of the consumer base in sales floor staff
- Collaborate with local organizations and provide owners opportunities to engage (e.g., small percentage of service fees going to a local water preservation group)



### Manufacturers

- Demonstrate **transparency** and **authentic commitment** through active community involvement and clear, consistent communication
- Offer educational content on **eco-friendly options**, highlighting sustainable brand practices and environmentally conscious options (e.g. electric motors)
- Identify **social media influencer partnerships** that authentically represent the brand and **engage diverse audiences**



- Expand content showcasing diverse types of families and individuals enjoying boating lifestyle
- Create content that resonates with motivations around adventure, relaxation, and nature (e.g., "blue therapy" wellness retreats, eco-tours)





## How The World Is Changing

Digital tools are now seamlessly integrated into consumer life, driving an expectation for **instant, mobile access** and **increased adoption** across all sectors.

This has elevated expectations for **efficiency** and **personalization**. Social platforms have also evolved into **powerful discovery engines** where **community validation** now drive purchases and shape opinions more than traditional advertising.



## What We're Seeing With This Target

- **Digital adopters** who value technology and prefer vehicles and boats equipped with the latest features
- **Active online** and on **social media**
- **Social media, websites,** and **online reviews** are top information sources
- Prefers to **shop online** than in store



## What This Means

- Expect to use **digital channels for their consumer journey**, from research to moment of purchase
- **Likely to be highly informed** as they receive information related to boating **online** and **from social media**
- More likely influenced by **digital channels** compared to off-line
- Expect **instant, mobile-optimized information** and efficient, personalized interactions
- View **boat technology as a necessary component** for safety, connectivity, performance

Note: Analysis drawn from expanded survey questions beyond data shown on the slide before. More data for each Cluster can be found in the appendix



## Ways To Connect



### Dealers

- Respond quickly and professionally to all feedback across digital channels
- Ensure the digital experience is seamlessly connected to the in-person journey, and be prepared to engage highly informed customers



### Manufacturers

- Clearly highlight boats with **advanced, integrated technologies**, emphasizing how these features serve as **meaningful upgrades** to their existing boats
- Make sure websites are up-to-date with **extensive photo galleries and video tours** of boats and new features
- **Strategically partner with influencers or online sources beyond the boating world** (e.g., tech YouTubers) to gain more visibility and interest to new boat models



- Utilize digital platforms (e.g., short-form video (Instagram reels/TikTok) for quick tips, YouTube for in-depth reviews/safety guides
- Create online forums and communities where recent owners can connect





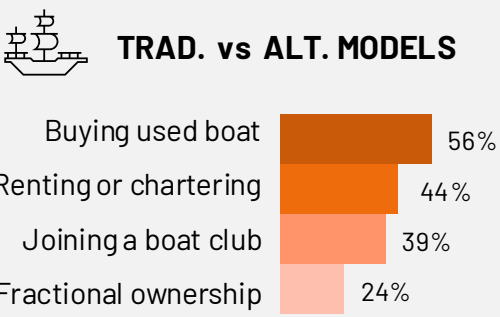
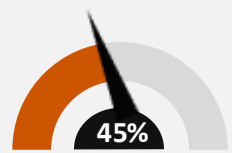
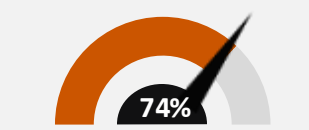
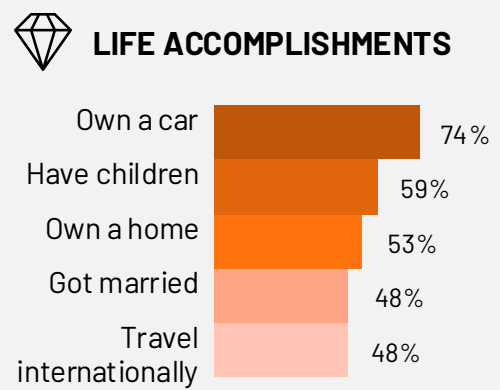
# Inexperienced

Avg. age 37 y.o.	White 56% Black 23% Hispanic 12%	Male 61% Female 38%	Bachelor Degree 30%	Kids in HH 42%	Avg. Income \$68.5k	Avg. time on social media 12.3 hours

I have a **moderate outlook** on both my **personal finance** and the **current economy**. I value **different cultures** and rely on **my friends and family** more than the digital sources. Although I have interest in boating, I **lack experience and knowledge**.

## ECONOMIC UNCERTAINTIES

### CURRENT OUTLOOK ON...



## SOCIAL RECONFIGURATION

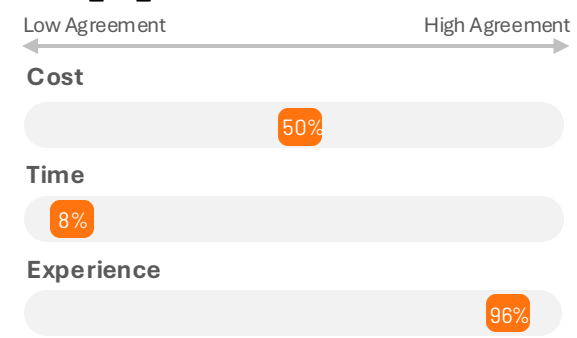
### MINDFUL LIVING



### TOP DISCRETIONARY ACTIVITY

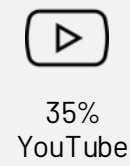
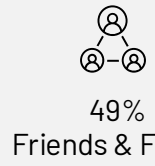


### BOATING BARRIERS

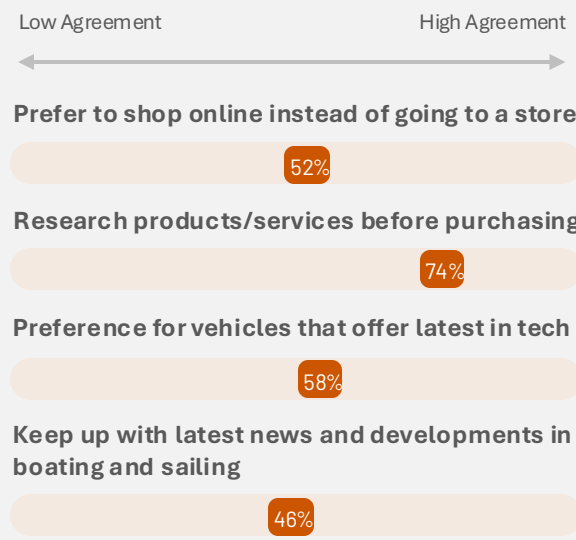


## TECH-CELERATION

### SOURCES OF INFLUENCE



### DIGITAL ATTITUDES





## How The World Is Changing



Global economic pressures are fueling **cautious, value-driven spending** while simultaneously driving a “-Live-Once” mindset focused on **immediate experiential rewards**.



## What We're Seeing With This Target

- **Relatively positive financial outlook** and perception (on par with other prospect groups)
- **Lower income** level and lower percentage of those with **bachelor's degrees**
- **Experience** is the main barrier when it comes to ownership, but **cost of entry** is also a challenge with the lower income
- **High likelihood to purchase** but also open-minded towards **different shared services models**



## What This Means

- With the lack of experience and lower income, **shared service models provide a risk-free gateway** to address their two biggest concerns
- **Hands-on exposure** or **trial opportunities** (rentals, boat clubs, test rides) will be crucial for them to build confidence – particularly where education and instruction are offered



## Ways To Connect

### Dealers

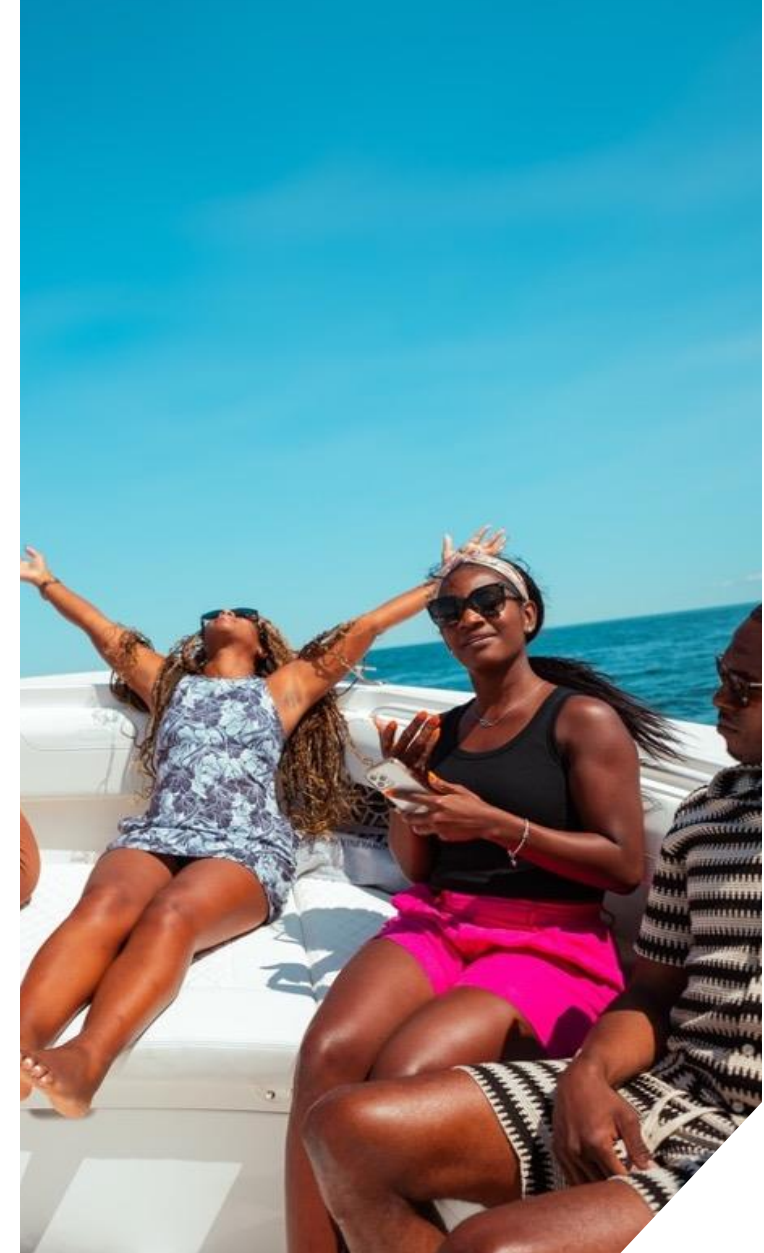
- Focus on guiding them through used and affordable boats that provide lower initial investment but bring them into the category
- Host fun and low-commitment local on-water events that give them a firsthand taste of the boating experience

### Manufacturers

- Serve as a **trusted financial** and **educational mentor** by offering clear, easy-to-understand resources, such as working with dealers to offer a first-time boater safety kit, on-water training, and a step-by-step ownership and financial guide

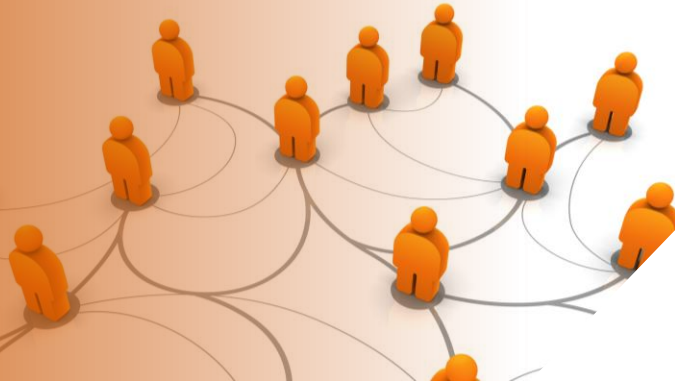
### DISCOVER BOATING™

- Normalize access as an important steppingstone to becoming a boat owner
- Offer an interactive online calculator or comparison tool that clearly shows the financial tipping point where ownership becomes more cost-effective than a boat club or rental model
- Provide clear, non-intimidating information or videos that break down financial steps to becoming a boater (e.g., “Budgeting for Boating Life”)





## How The World Is Changing



Driven by **generational and demographic shifts**, America is seeing **cultural norms** being redefined around identity and inclusion.

Younger consumers are delaying major milestones in favor of **financial security and flexibility**, becoming intentional spenders who prioritize products and experiences aligning with their **health, ethical, and environmental values**.



## What We're Seeing With This Target

- **More diverse** in **demographics** (higher share of Black and Hispanics across all prospects)
- **Experience** followed by **cost** are the key barriers to boat ownership
- **Environmental** or **ethical responsibility** falls **slightly lower than the average of** prospect clusters
- High percentage recall boating or have impressions of boating being **a way to spend time alone**



## What This Means

- Will likely want to see more **diverse representation** in the boating landscape (across boat shows, dealers, marketing content, etc.)
- Environmental and ethical messages **are not as relevant to them** compared to other clusters, and the decision is driven more by **practicality, safety, and personal relevance**
- Boating should be positioned as a **flexible, welcoming activity** that fits diverse cultural norms and social gatherings



## Ways To Connect



### Dealers

- Offer introductory boating and safety courses in accessible local areas, open to anyone interested in getting into boating
- Place greater emphasis on cultural competency on staff training, and actively ensure dealership teams reflect the growing diversity of the consumer base
- Use simple and easy-to-understand language to explain features, emphasizing *why* they matter, not just *how* they work



### Manufacturers

- Serve as **confidence builders** and offer **introductory courses** on boating skills and safety such as **on-water training sessions**, and a **step-by-step ownership guide**



- Ensure different demographics are represented in marketing communications and campaigns
- Create a feature that helps new boaters find local, active, and welcoming boating clubs or social groups





## How The World Is Changing

Digital tools are now seamlessly integrated into consumer life, driving an expectation for **instant, mobile access** and **increased adoption** across all sectors.

This has elevated expectations for **efficiency** and **personalization**. Social platforms have also evolved into **powerful discovery engines** where **community validation** now drive purchases and shape opinions more than traditional advertising.



## What We're Seeing With This Target

- Relatively **open to technology**, showing similar level of interest with other prospect groups
- **YouTube** is the one of the top sources of information, but still value **friends & family** as an important resource
- **Lowest social media usage** among all prospects
- Feels **equally** comfortable **shopping online and in-person**
- **Likes to research** products or services before purchasing, including the latest tech developments



## What This Means

- **YouTube** is an essential educational platform and tool
- Views **technology as a nice-to-have**, rather than the main deciding factor for purchase
- Digital and mobile experiences must **reinforce the trust they get from friends and family** and still provide the personal validation they need

Note: Analysis drawn from expanded survey questions beyond data shown on the slide before. More data for each Cluster can be found in the appendix



## Ways To Connect



### Dealers

- Ensure digital experience is seamlessly connected to the in-person journey, allowing them to switch between the method they feel most comfortable with

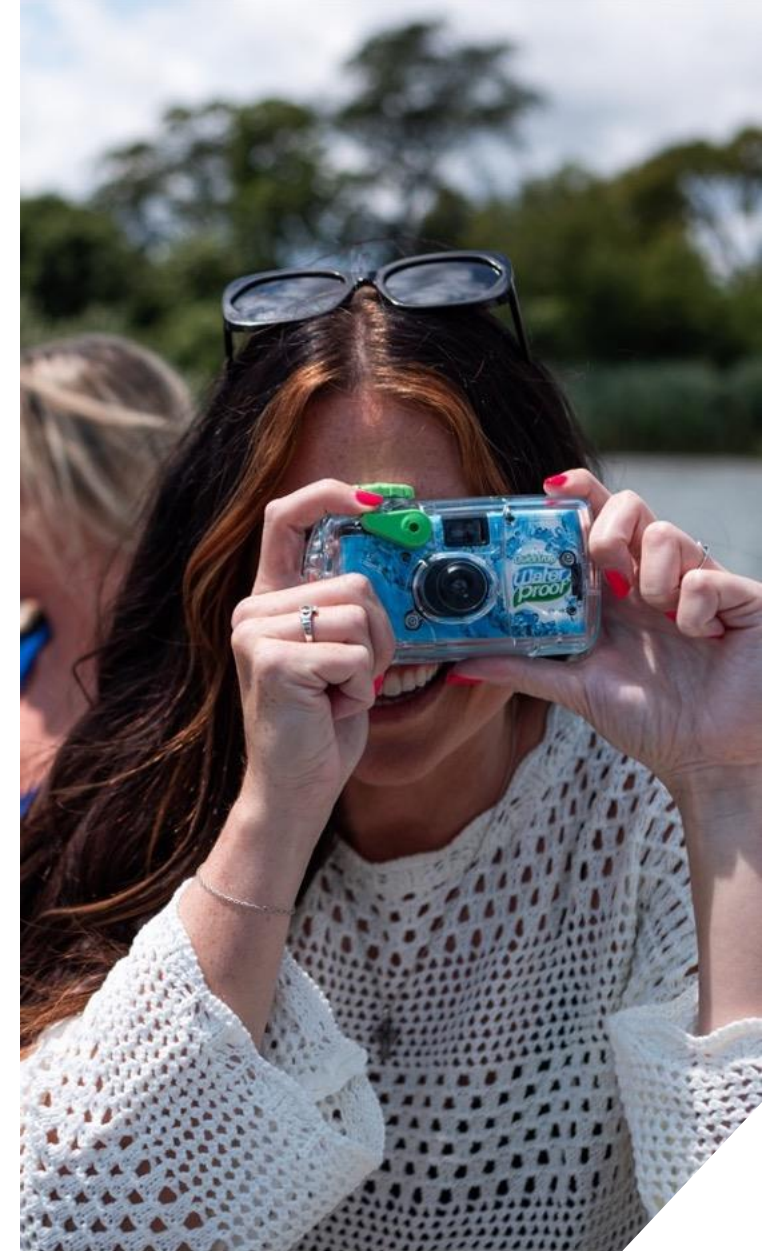


### Manufacturers

- **Host in-person events** and share **YouTube and social content** where loyal customers discuss their **first-time experiences** to reinforce trust
- Strategically collaborate with YouTubers to **create engaging content** such as “A Day in the Life of a Boater” or “Boating 101 tutorials” that feature different boats



- Ensure all educational content on the website and YouTube is designed for quick social sharing for easy validation with the trusted network
- Provide authentic testimonials that feature new boaters, so the content feels relevant for them





# Sales Ready



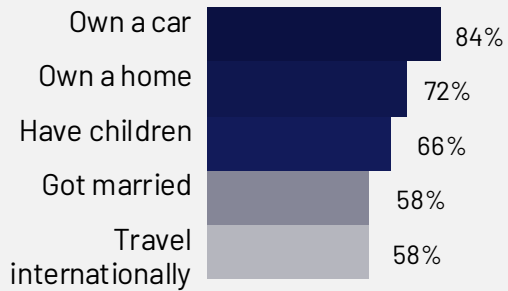
Avg. age 34 y.o.	White 75% Black 11% Hispanic 9%	Male 64% Female 36%	Bachelor Degree 48%	Kids in HH 68%	Avg. Income \$80k	Avg. time on social media 16 hours

Although I am **younger**, I have a **relatively positive outlook** on both my **personal finance and the current economy**. I've achieved many **milestones**, and I am open towards different **alternative models** boating offer. I am very **active on social media** and get most of **my resources** from there.

## ECONOMIC UNCERTAINTIES

### CURRENT OUTLOOK ON...

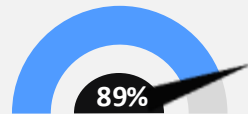
#### LIFE ACCOMPLISHMENTS



#### TRAD. vs ALT. MODELS

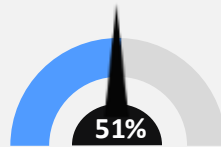


#### PERSONAL FINANCES



#### STATE OF ECONOMY

Neutral/Not worried



#### PURCHASE LIKELIHOOD



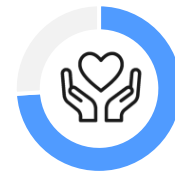
**84%**  
Likely to buy on average

## SOCIAL RECONFIGURATION

### MINDFUL LIVING



Minimizing impact on the environment is important (68%)



Buy from a company that supports my community even if it would be more expensive to (74%)



Other cultures enrich our society (63%)

#### TOP DISCRETIONARY ACTIVITY



45%  
International /world travel

#### BOATING BARRIERS

Low Agreement High Agreement

Cost 62%

Time 7%

Experience 58%

## TECH-CELERATION

### SOURCES OF INFLUENCE



57%  
Social Media



56%  
YouTube



### DIGITAL ATTITUDES

Low Agreement High Agreement

Prefer to shop online instead of going to a store 66%

Research products/services before purchasing 78%

Preference for vehicles that offer latest in tech 79%

Keep up with latest news and developments in boating and sailing 81%



Global economic pressures are fueling **cautious, value-driven spending** while simultaneously driving a “-Live-Once” mindset focused on **immediate experiential rewards**.



## What We're Seeing With This Target

- **Relatively positive financial outlook** and perception (highest among all prospect groups) but **high cost of ownership** is biggest point of hesitation
- Achieved many **life milestones**, approximately 2 in 3 have kids
- **High likelihood to purchase** but also **open-minded towards different** shared services models
- Shows the **highest likelihood to purchase** among all prospect groups
- **Highest average income** among all prospect groups



## What This Means

- Likely in a financially-stable state of life where they are **able to enjoy boating**
- Boats are the **last major discretionary commitment** after achieving milestones, and will seek to get the **most value out of the purchase**
- Likely to be **early adopter of changing access models**
- Financially ready to purchase a boat but **resources on lower financial entry points** will help

Note: Analysis drawn from expanded survey questions beyond data shown on the slide before. More data for each Cluster can be found in the appendix



## Ways To Connect



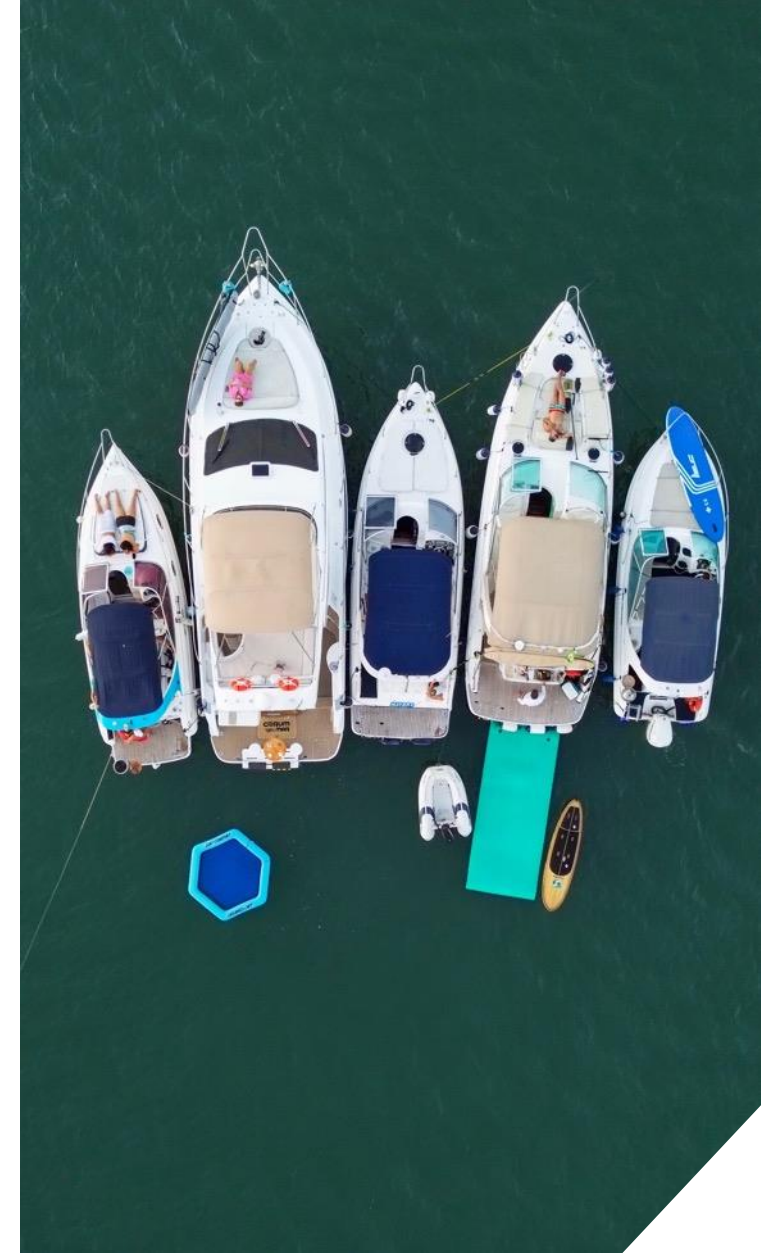
### Dealers

- Offer simple, transparent materials and consultations that break down Total Cost of Ownership
- Provide information on financing (e.g., affordable monthly payment) so they can gain confidence in moving towards act of purchase
- Promote used, certified pre-owned models as an alternative to new boat purchase



### Manufacturers

- Communicate boating as an activity that **can be enjoyed within a moderate budget**
- Create content that **reframes the cost of a boat** against the rising costs of competing family activities to highlight the value gained from time on the water
- Sell the **family experience**, connecting the boat directly to their achieved milestones and making great memories with kids, relatives and friends
- Extend **invitations of select owner meet-ups** where current owners address concerns and showcase the lifestyle and community awaiting them





## How The World Is Changing

Driven by **generational and demographic shifts**, America is seeing **cultural norms** being redefined around identity and inclusion.

Younger consumers are delaying major milestones in favor of **financial security and flexibility**, becoming intentional spenders who prioritize products and experiences aligning with their **health, ethical**, and **environmental values**.



## What We're Seeing

- **Skews White** compared to other prospect groups
- **Youngest** demographics among all prospect groups
- Values **sustainability** and **environmental responsibility**
- **Willing to pay more** for brands that **align with their values**
- Exhibits **highest spend on experiences and travel** among all prospect groups



## What This Means

- Many, as young parents, will likely look for ways boating can offer **fun family experiences with their children**
- Demand information on **sustainable boating**, and sensitive to **ecological footprint and ethical practices**
- Seek Dealers/Manufacturers that demonstrate proactive commitment to **local conservation** and **ethical community engagement**
- View recreational boating as an **immersive experience** they can have, rather than something they own

Note: Analysis drawn from expanded survey questions beyond data shown on the slide before. More data for each Cluster can be found in the appendix



## Ways To Connect



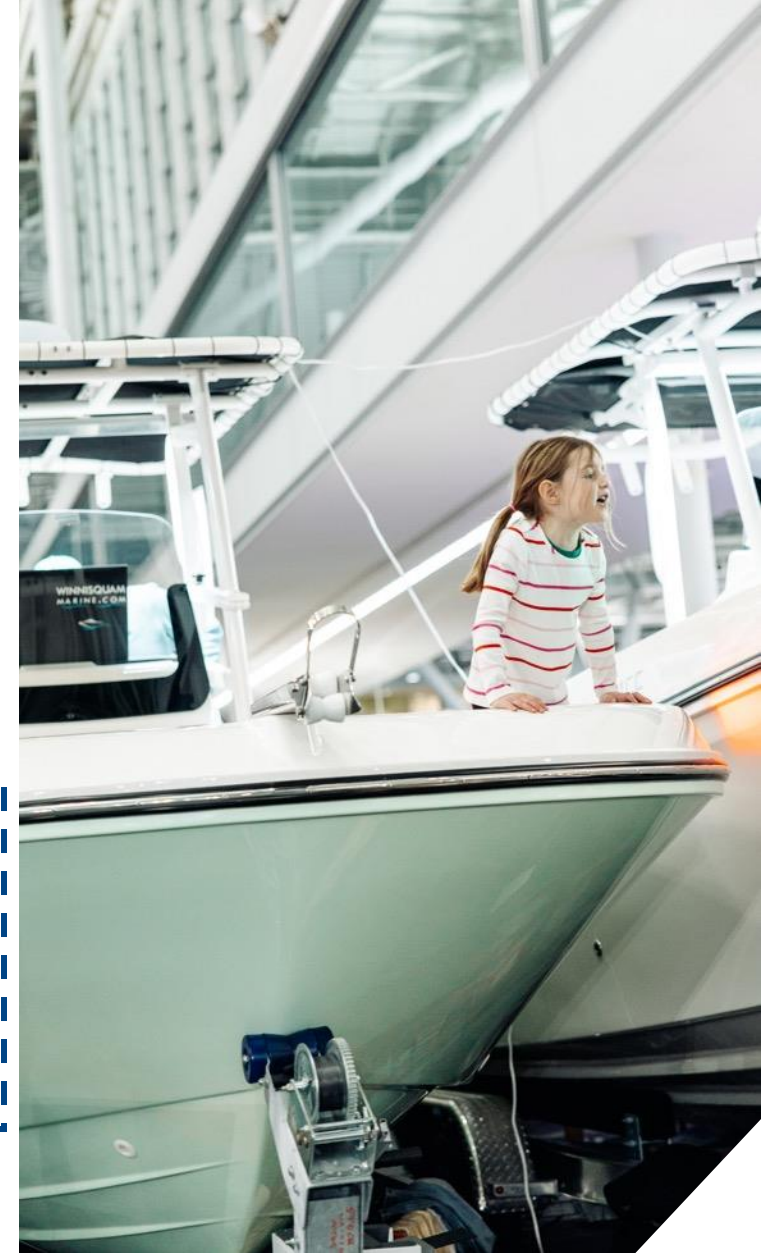
### Dealers

- Provide personalized, dealer-curated guides to local low-impact cruising areas or nature preserves
- Create resources to help them research boat brands that have transparent, environmental and ethical commitments
- Host local, family-focused gatherings (e.g., dock parties for prospective boaters) that give families opportunities to connect and engage
- Place greater emphasis on the experience of being on water over being a boat owner



### Manufacturers

- Provide resources on how boating can be enjoyed in **sustainable ways**
- Use articles and visuals that connect boating directly to **mental health, stress reduction,** and **digital detox**
- Actively promote boats designed for **enjoyable family and kid-friendly experiences**





## How The World Is Changing

Digital tools are now seamlessly integrated into consumer life, driving an expectation for **instant, mobile access** and **increased adoption** across all sectors.

This has elevated expectations for **efficiency** and **personalization**. Social platforms have also evolved into **powerful discovery engines** where **community validation** now drive purchases and shape opinions more than traditional advertising.



## What We're Seeing With This Target

- **Digital adopters** who value technology and prefer vehicles equipped with the latest features
- **Active on social media**, with highest **social media usage** among all prospects
- **Social media** and **YouTube** are top information sources and get influenced from them
- Regularly **follows social media posts of brands** or companies of interest, as well as **latest news in boating**



## What This Means

- Expect to use **digital channels for their consumer journey**, from research to moment of purchase, and expect it to be **fast, mobile-friendly**, and **transparent**
- Social media and YouTube are not just a research engine, but also a **virtual showroom** and tool for **validation**
- View technology as a **core part of boat's value proposition**
- Content creators and YouTubers are **highly influential** to this cluster

Note: Analysis drawn from expanded survey questions beyond data shown on the slide before. More data for each Cluster can be found in the appendix



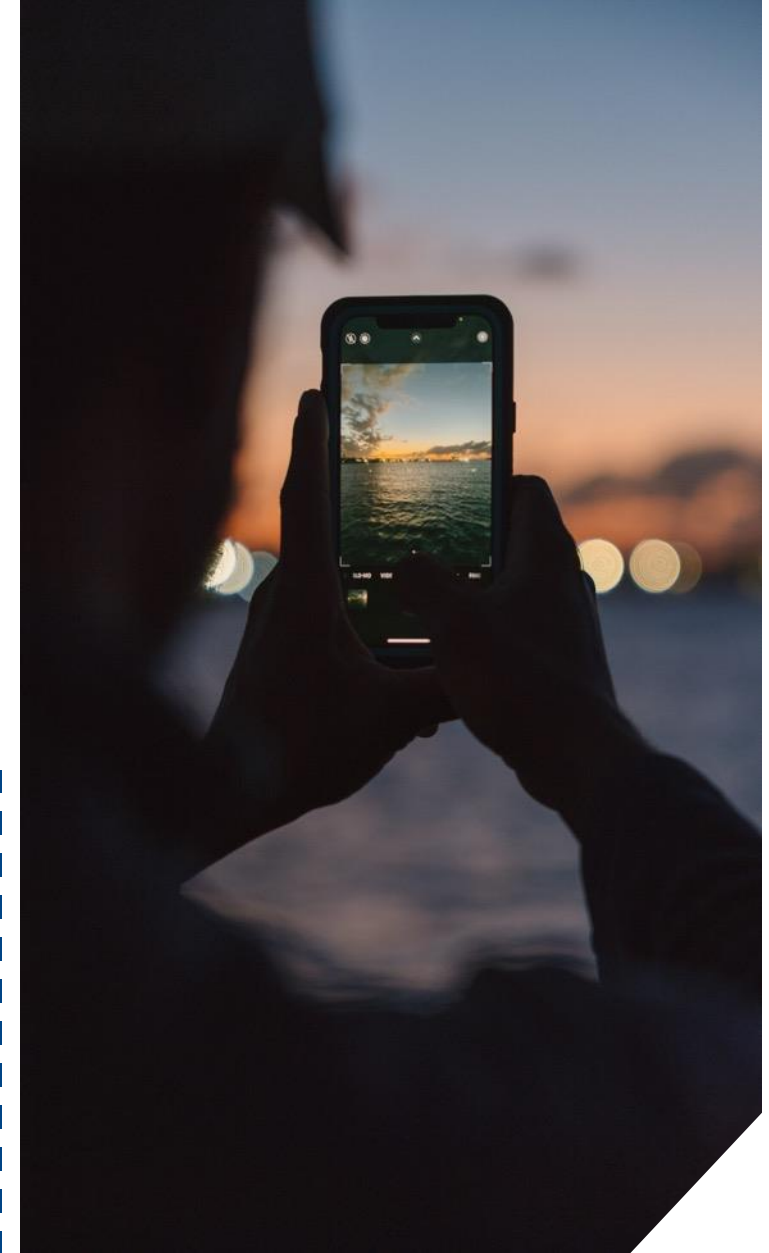
## Ways To Connect

### Dealers

- Ensure the digital experience is seamlessly connected to the in-person journey with live chat, linked social media, text communication, online appointments, and transparent pricing
- Invest in professional video walk-throughs (both short-form and long-form) of high-interest models so they can visualize every element of them
- Develop highly engaging, mobile-friendly website tools that allow users to easily compare models or guide them to the best fit for their needs (e.g., a fun interactive assessment)

### Manufacturers

- **Strategically partner with influencers** on social media and post **videos on YouTube** to gain more visibility and interest
- Maintain an **active social media presence**, being selective with content to ensure it **accurately reflects brand values** and **resonates with their focus** on family time and immersive experiences
- Offer **immersive digital experiences** of boat interiors and exteriors, and **invest in professional video walk-throughs** of high-interest models, allowing potential buyers to **fully explore and experience the boats** before visiting the dealership to satisfy their research needs



# APPENDIX



# Key Takeaways for: Dealers

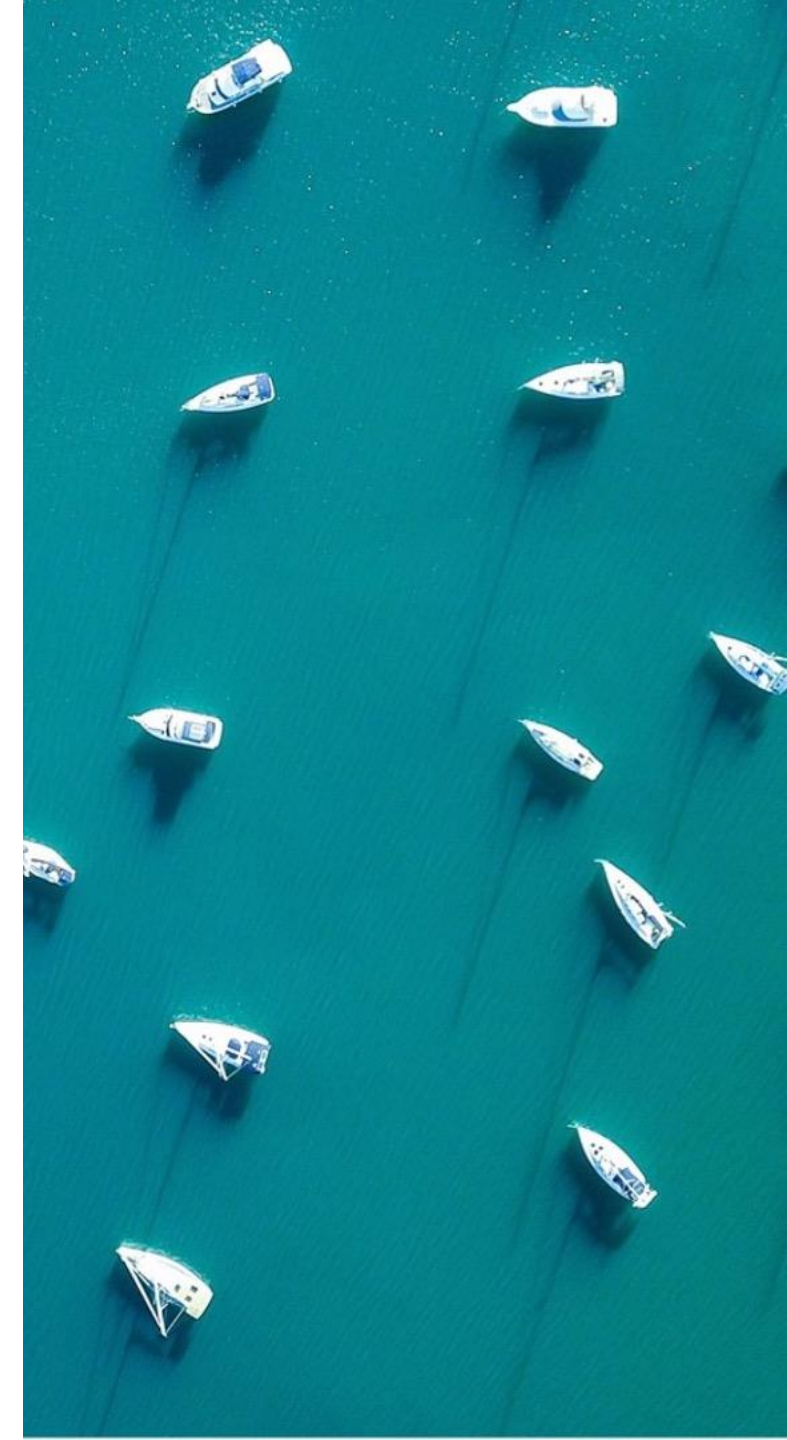
## Relevant Target Boaters

- **Current Owners (Established & Recent)**
- **Inexperienced**
- **Sales-ready**

## Ways to Connect

- Improve **transparency** through clear service and maintenance plans that offer **a fixed, predictable cost for routine maintenance**
- Collaborate with **local organizations** and provide **owners opportunities to engage**
- Host fun and low-commitment local **on-water events** that give prospective boaters a firsthand taste of the boating experience
- Offer **introductory boating and safety courses** in accessible local areas, open to anyone interested in getting into boating
- Ensure the digital experience is **seamlessly connected to the in-person journey**, and be prepared to engage highly informed customers
- Develop **highly engaging, mobile-friendly website** tools that allow users to easily compare models or guide them to the best fit for their needs

*Further implications are detailed within the individual Target Cluster profiles in the Futureproofing section.*



# Key Takeaways for: Discover Boating

## Relevant Target Boaters

- **Current Owners (Established & Recent)**
- **Cost-Conscious**
- **Time-Pressed**
- **Inexperienced**

## Ways to Connect

- Position boating as an **investment in family memories, relaxation, and life experiences**
- **Normalize access** as an important steppingstone to becoming a boat owner for prospective boaters
- Develop **owner spotlight campaigns** that highlight their personal stories
- Develop content and videos that tie back to the **core motivations** for each group (e.g., relaxing time in nature, with family, and being outdoors)
- Leverage **the power of existing owners** by hosting events such as owner testimonials that introduce people into boating
- Create **online forums and communities** where owners can connect, and a feature that helps new boaters find **local, active, and welcoming boating clubs or social groups**
- Provide **short and quick YouTube videos** that provide quick summaries of key boat types, ownership costs, and features

*Further implications are detailed within the individual Target Cluster profiles in the Futureproofing section.*





# Cost Conscious



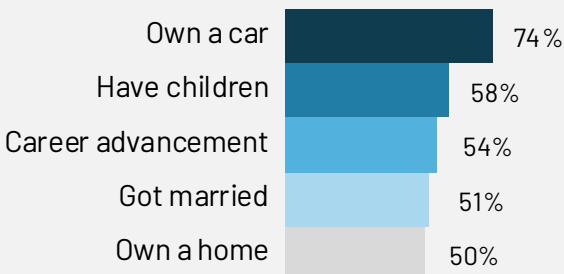
Avg. age 38 y.o.	White 59% Black 20% Hispanic 13%	Male 67% Female 33%	Bachelor Degree 33%	Kids in HH 50%	Avg. Income \$74.0k	Avg. time on social media 14.38 hours

I hold a more **pessimistic view on my personal finances** and **the state of economy**. Although I have interest in boating, **cost is my barrier**. I care about **sustainability** and **minimizing impact on environment**. I rely both on **social media** and **people around me** for resources.

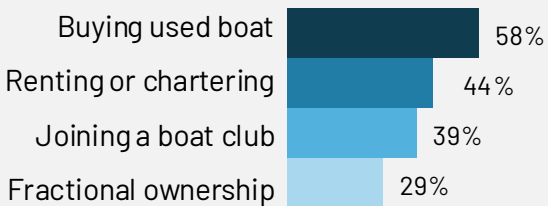
## ECONOMIC UNCERTAINTIES

### CURRENT OUTLOOK ON...

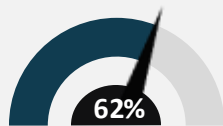
#### LIFE ACCOMPLISHMENTS



#### TRAD. vs ALT. MODELS

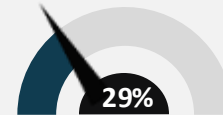


#### PERSONAL FINANCES



#### STATE OF ECONOMY

Neutral/Not worried



#### PURCHASE LIKELIHOOD



Likely to buy on average

## SOCIAL RECONFIGURATION

### MINDFUL LIVING



Minimizing impact on the environment is important (67%)



Buy from a company that supports my community even if it would be more expensive to (61%)



Other cultures enrich our society (67%)



#### TOP DISCRETIONARY ACTIVITY



27% International /world travel

82



#### BOATING BARRIERS

Low Agreement High Agreement

Cost 97%

Time 21%

Experience 70%

## TECH-CELERATION

### SOURCES OF INFLUENCE



40% Social Media



37% Friends & Family



#### DIGITAL ATTITUDES

Low Agreement High Agreement

Prefer to shop online instead of going to a store 54%

Research products/services before purchasing 73%

Preference for vehicles that offer latest in tech 56%

Keep up with latest news and developments in boating and sailing 47%



## How The World Is Changing



Global economic pressures are fueling **cautious, value-driven spending** while simultaneously driving a YOLO mindset focused on **immediate experiential rewards**.



## What We're Seeing With This Target

- **Less optimistic** on the **outlook of the economy**
- Values **career advancement** (highest among all clusters, including owners)
- Average when it comes to **likelihood to purchase**, and open towards **alternative models**
- Financially-sensitive cluster with **a majority owning a car**



## What This Means

- Hyper-aware of the ongoing costs of maintaining a vehicle, likely to be calculated spenders
- Career-driven individuals who seek to maximize income/wealth, and boat expenditures will need to support this financial goal
- Will seek for **transparent, low-cost options** where the total cost is fully known upfront



## Ways To Connect



- Offer **easy-to-understand financial education**, including budgeting tips for boating and comparisons of ownership vs. shared-access models
- Create **step-by-step guides** for first-time buyers that cover financing, insurance, and ongoing costs (e.g., fuel surcharge, late fees)
- Position ownership as a long-term financial goal but **emphasize access** as the **necessary current solution** for immediate enjoyment
- Create content that **validates and celebrates boat clubs and rentals as the best first step** for cost-conscious prospects
- Provide **trial memberships for boat clubs or shared-access programs** they can get through Discover Boating, or offer scholarships or discounts for first-time boaters in training courses or boating workshops to encourage them





## How The World Is Changing



Driven by **generational and demographic shifts**, America is seeing **cultural norms** being redefined around identity and inclusion.

Younger consumers are delaying major milestones in favor of **financial security and flexibility**, becoming intentional spenders who prioritize products and experiences aligning with their **health, ethical, and environmental values**.



## What We're Seeing With This Target

- **High willingness** to purchase from a company that **supports community**
- **Cost** is the main barrier when it comes to ownership
- **Around average** when it comes to **environmental** or **ethical responsibility**
- High percentage perceive boating as **not being for people like themselves**



## What This Means

- Since **cost is the primary barrier** and their ethical responsibility is average, they are likely to prioritize **affordability and accessibility** over premium eco-friendly features
- Given that financially pressed individuals often **represent a wide array of racial background**, inclusive representation may be important to them
- Will likely seek communication that makes them **feel financially included**

Note: Analysis drawn from expanded survey questions beyond data shown on the slide before. More data for each Cluster can be found in the appendix



## Ways To Connect



- Show boating as a **lower-carbon footprint, higher-freedom form of travel** compared to air travel and international trips
- Provide marketing and communications that emphasize **inclusivity and belonging**, showing that **boating is for everyone, not just wealthy or experienced individuals**





## How The World Is Changing

Digital tools are now seamlessly integrated into consumer life, driving an expectation for **instant, mobile access** and **increased adoption** across all sectors.

This has elevated expectations for **efficiency** and **personalization**. Social platforms have also evolved into **powerful discovery engines** where **community validation** now drive purchases and shape opinions more than traditional advertising.



## What We're Seeing With This Target

- Relatively **open to technology**
- **Social Media** is the top source of information
- Still value **friends & family** as important resource
- **Actively researches** products and services before purchasing
- **Prefers to shop online** than in-person



## What This Means

- What they see on social media has **high influence** on their **perceptions and decisions**
- Digital and mobile experiences must **reinforce the trust they get from friends and family** and still provide the personal validation they need



## Ways To Connect



- **Strategically partner with lifestyle influencers** on social media who can share relatable experiences and demonstrate that boating is accessible
- Highlight **diverse stories and testimonials** on website and social media from boaters of different backgrounds and financial situations
- Publish **short and concise educational content** on social media that can easily be shared for **validation with trusted network**





# Time Pressed



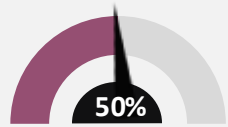
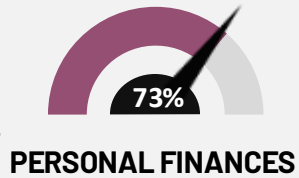
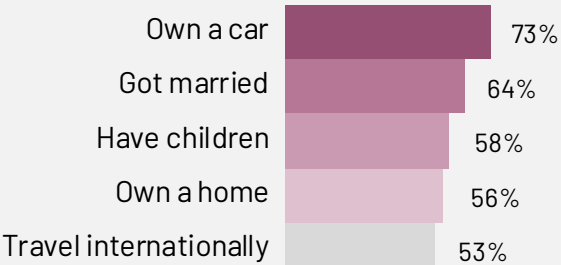
Avg. age 40 y.o.	White 63% Black 19% Hispanic 10%	Male 72% Female 27%	Bachelor Degree 44%	Kids in HH 49%	Avg. Income \$70.1k	Avg. time on social media 14.34 hours

I have a relatively positive view towards both my **personal finance** and the **economy**. Although I have interest in boating, **time is an issue** for me. I rely on **my friends and family** more than the digital sources.

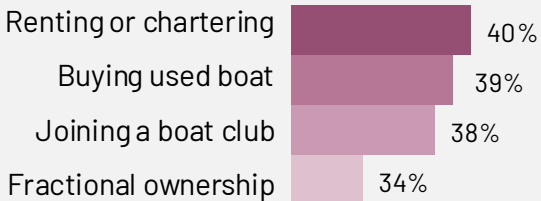
## ECONOMIC UNCERTAINTIES

### CURRENT OUTLOOK ON...

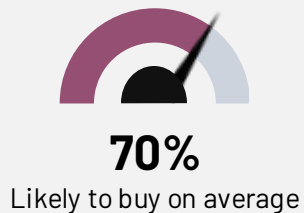
#### LIFE ACCOMPLISHMENTS



#### TRAD. vs ALT. MODELS



#### PURCHASE LIKELIHOOD



## SOCIAL RECONFIGURATION

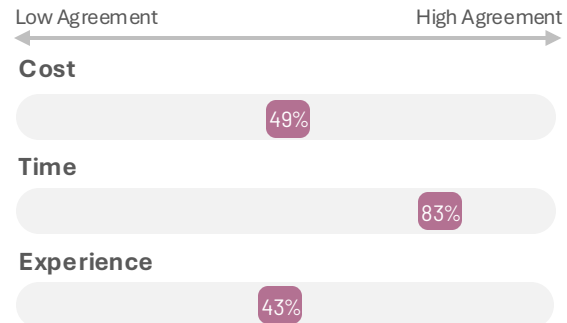
### MINDFUL LIVING



#### TOP DISCRETIONARY ACTIVITY

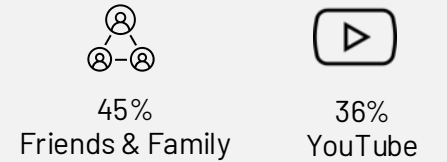


#### BOATING BARRIERS

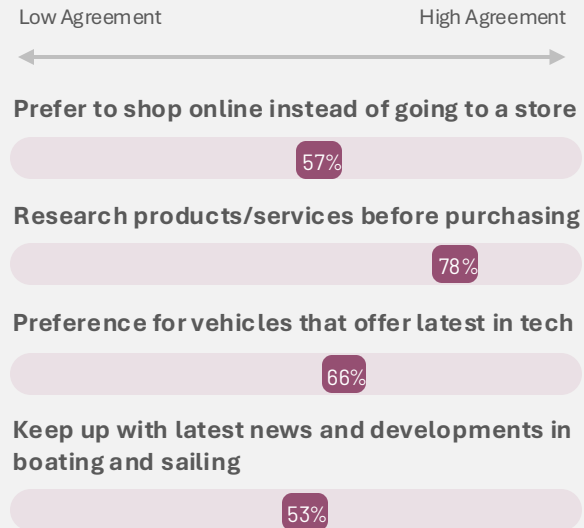


## TECH-CELERATION

### SOURCES OF INFLUENCE



### DIGITAL ATTITUDES





## How The World Is Changing

Global economic pressures are fueling **cautious, value-driven spending** while simultaneously driving a “-Live-Once” mindset focused on **immediate experiential rewards**.



## What We're Seeing With This Target

- **Relatively positive financial outlook** and perception (relative to other prospect groups)
- **Oldest in age** among all prospect groups
- Average for both **likelihood to purchase** and **openness towards different alternative models**
- Accomplished **major traditional life milestones**, especially those that require high commitment like car ownership and raising a family



## What This Means

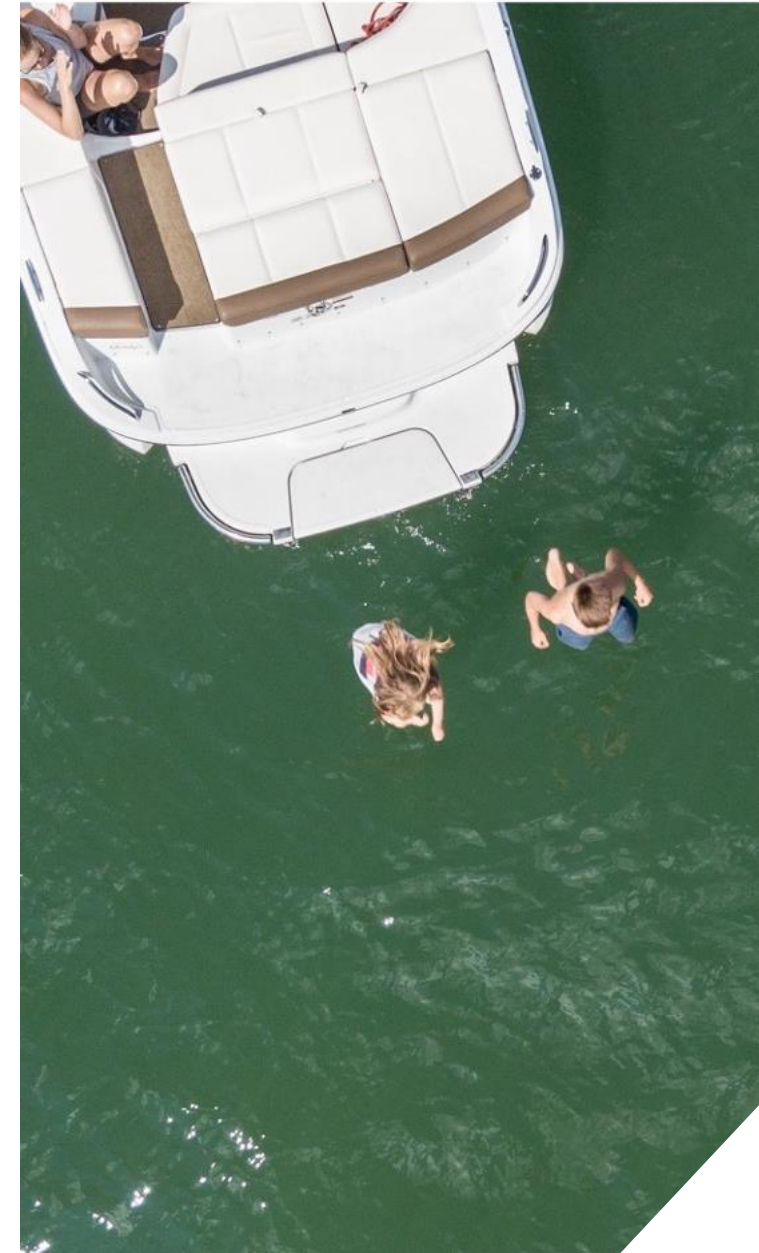
- **Time-poor individuals** who are hyper-aware of the longer-term costs associated with boat ownership beyond the purchase price
- **Ease of use, convenience,** and **streamlined experience** will be the most important for them
- Will likely view alternative models as ways to **get time on water without administrative commitment** of ownership



## Ways To Connect

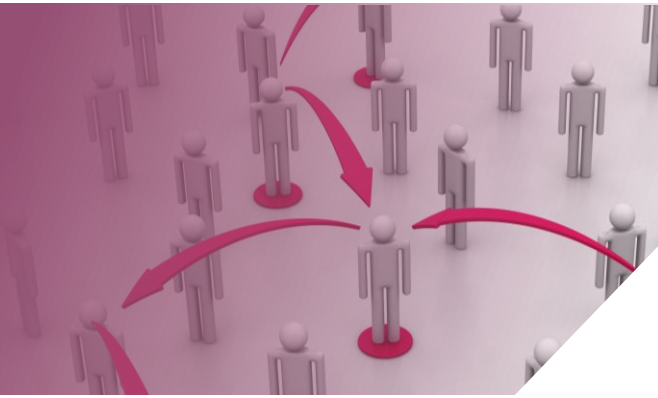


- **Validate the investment** by creating compelling content that positions boating as **efficient, guaranteed way to spend high-quality time with family and friends**
- Provide **simple guides** that help them navigate best course of action based on **time-for-cost ratio on expected usage**
- Deliver **experience over logistics** by shifting the focus on what they can get from boating
- Introduce more **content on boat clubs, fractional ownership, and rentals** that allow for **flexibility and lower commitment**





## How The World Is Changing



Driven by **generational and demographic shifts**, America is seeing **cultural norms** being redefined around identity and inclusion.

Younger consumers are delaying major milestones in favor of **financial security and flexibility**, becoming intentional spenders who prioritize products and experiences aligning with their **health, ethical, and environmental values**.



## What We're Seeing With This Target

- **High willingness** to purchase from a company that **supports their community**
- **Time** is the main barrier when it comes to ownership
- **Around average** when it comes to **environmental** or **ethical responsibility** compared to other prospect groups
- High percentage claim that some of **best childhood memories involve being on or near the water**, and have impressions of it being associated with **excitement** and **fun**



## What This Means

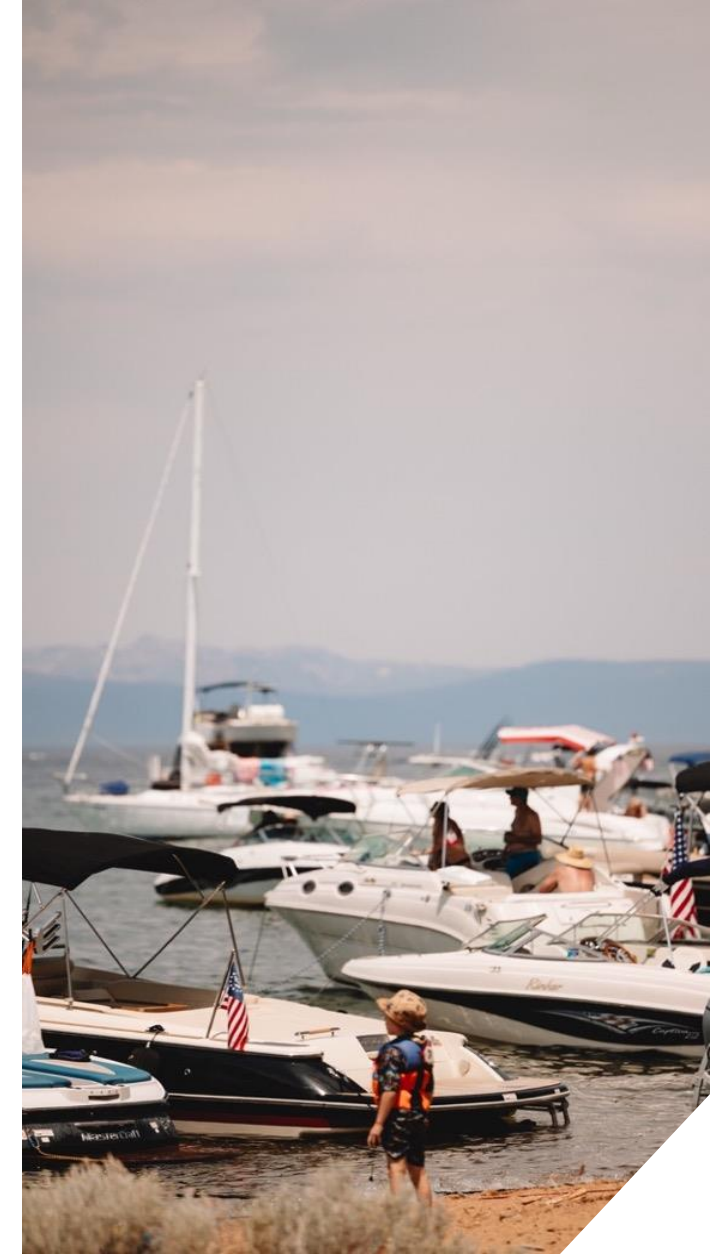
- Will seek for **high emotional ROI** as every experience on water matters **with limited time**
- Will likely buy a boat from a brand with **aligned personal values**
- Will likely **seek for the boating life** as long as time allows, since they have **positive memories** associated with life on water



## Ways To Connect



- Create content that focuses on **high-end, low-effort social experiences** on a boat
- Publish **community-driven narratives** such as people who use their boats for charitable activities or mentorship, providing **aspirational examples** of how to combine their passion with their desire for social contribution
- Provide exciting **pre-planned itineraries** and **guide on how to enjoy boating** (e.g., Thrill & Chill: A Guide to Boating Experiences) that **eliminate the time barrier**
- Provide **time-efficient education** or quick-read guides that are **brief and concise**





## How The World Is Changing

Digital tools are now seamlessly integrated into consumer life, driving an expectation for **instant, mobile access** and **increased adoption** across all sectors.

This has elevated expectations for **efficiency** and **personalization**. Social platforms have also evolved into **powerful discovery engines** where **community validation** now drive purchases and shape opinions more than traditional advertising.



## What We're Seeing With This Target

- Relatively **open to technology** and prefer vehicles equipped with the latest features
- **YouTube** is the one of the top sources of information, but still value **friends & family** as important resource
- **Actively researches** products and services before purchasing
- Tries to keep up with **latest news in boating**



## What This Means

- **YouTube** is very important educational tool
- Likely view **technology** on the boat as ways to **make things efficient**
- Digital and mobile experiences must **reinforce the trust they get from friends and family** and still provide the personal validation they need

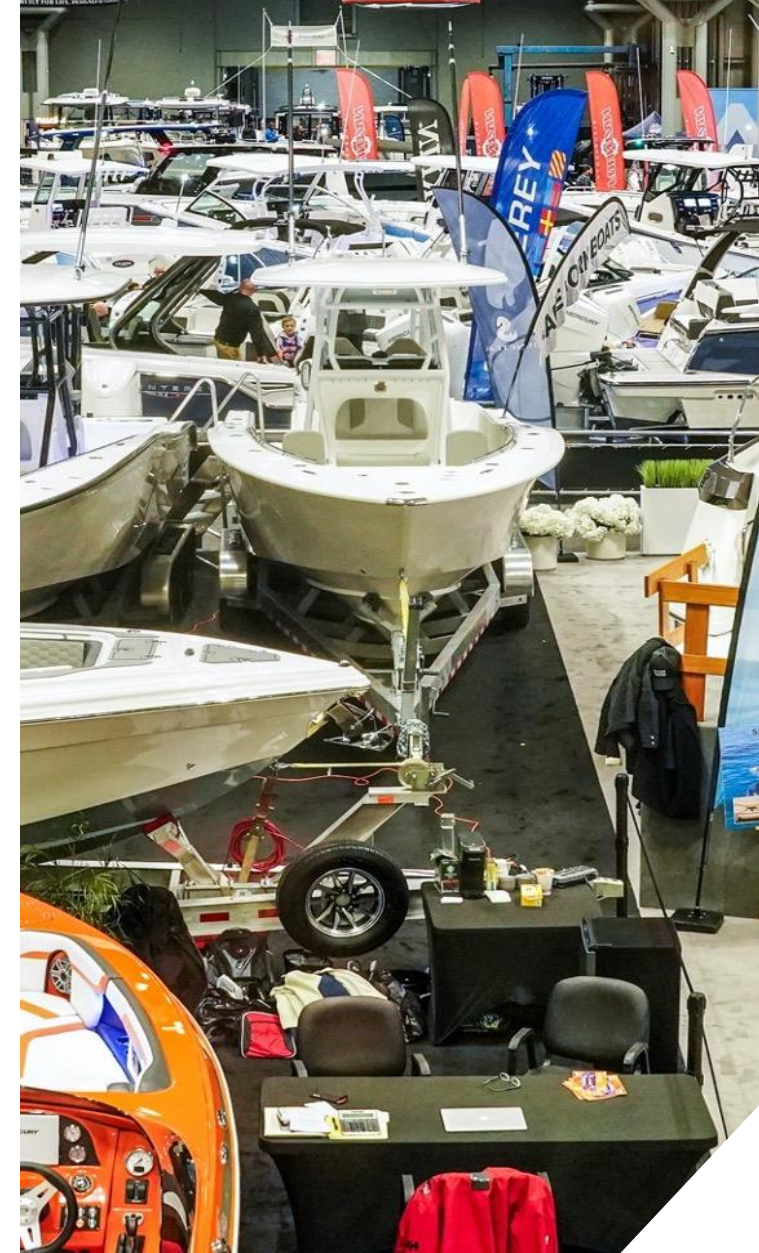
Note: Analysis drawn from expanded survey questions beyond data shown on the slide before. More data for each Cluster can be found in the appendix



## Ways To Connect



- Integrate **virtual tours and product comparisons** to reduce friction in the decision-making process
- Provide **short and quick YouTube videos** that provide quick summaries of key boat types, ownership costs, and features
- Ensure all educational content on website and YouTube is designed for **quick social sharing** for **easy validation via trusted networks of boaters and prospects**
- Feature **video testimonials** from accomplished and busy professionals who discuss **how boating improved their quality of life**
- Collaborate with influencers or YouTubers who focus on **practical, lifestyle-oriented boating content** (e.g., “A Day in the Life of a Boating Family”)

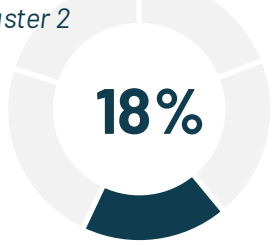


# PROSPECTIVE BOAT OWNER CLUSTERS

Detailed Cluster Profiles

# COST CONSCIOUS

Cluster 2

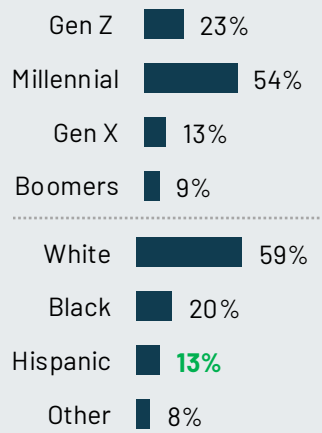
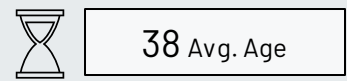


## KEY OVERVIEW

Cost Conscious Prospects are looking to purchase in the next 1-5 years. They are less likely to be advance or expert boaters and are mostly concerned with costs, considering not only the initial cost of the boat but also the storage and ongoing maintenance for the vehicle and fear they won't have time to use it.

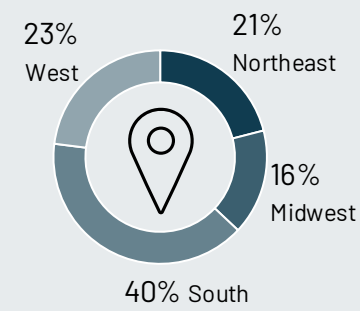
## KEY DEMOGRAPHICS

- 67%** Male
- 33%** Female
- 50%** Children in HH
- \$74.0k** Avg. Income



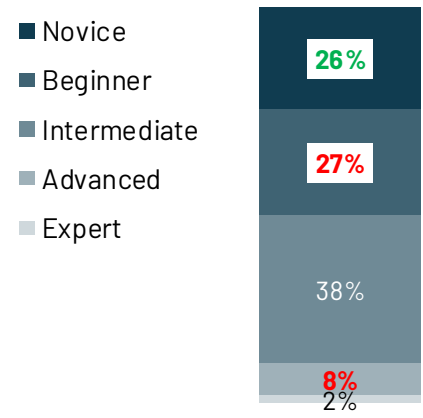
### Discretionary Income

24%	100% necessities / 0% discretionary
29%	90% necessities / 10% discretionary
39%	75% necessities / 25% discretionary

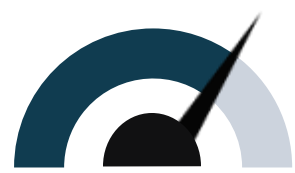


Miscellaneous Demographic Question, S1b, B3, HQS5, S5b, B1, B4, B2, C9, C9b  
 ● Over Index to Total Prospects (≥120%)  
 ● Under Index to Total Prospects (≤ 80%)  
 Indexing reported if Total Prospects %=5%+

## KNOWLEDGE LEVEL

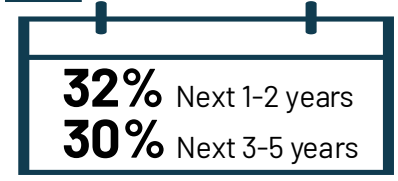


## LIKELIHOOD TO BUY BOAT



Likely to buy on average

## PURCHASE TIMEFRAME



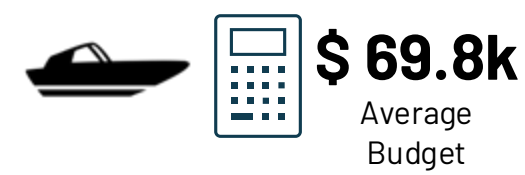
## TOP BOATS INTERESTED IN

26%	Fish-and-ski boat
24%	Freshwater fishing boat
20%	Yacht

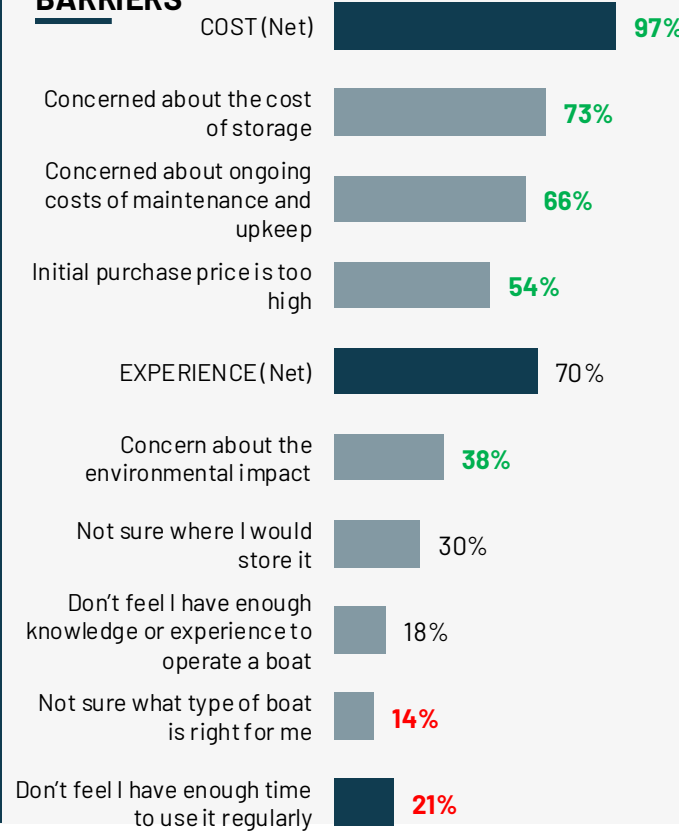
## 'DISCOVER BOATING'

**26%** Aware of 'Discover Boating'  
Aware of Discover Boating (n=23\*)  
 \*Base too low to report (n<30)

## ESTIMATED BOAT BUDGET



## BARRIERS



# COST CONSCIOUS

Cluster 2

18%

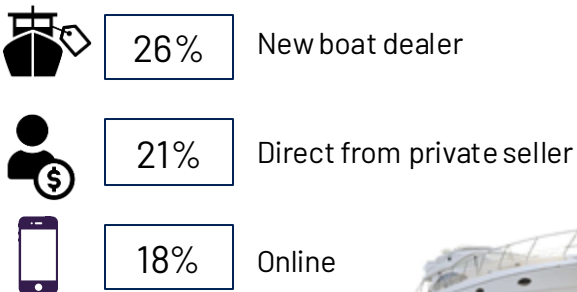


## PURCHASE JOURNEY

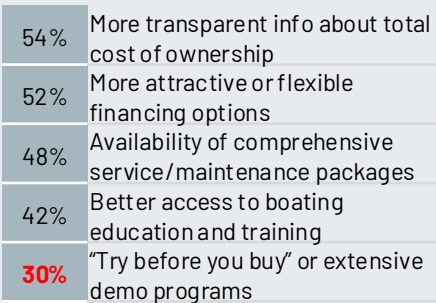
Financing, transparent cost information and comprehensive packages are appealing to this group who in general, consider traditional boat ownership somewhat unaffordable. When looking for a dealer they are less likely to care about the knowledge and expertise of the staff or one specific brand; instead they are looking for a wide selection of boats and brands, dealers who showcase the latest technology/innovations and availability of financing options.

### PLANNED PURCHASE

Top Mentions

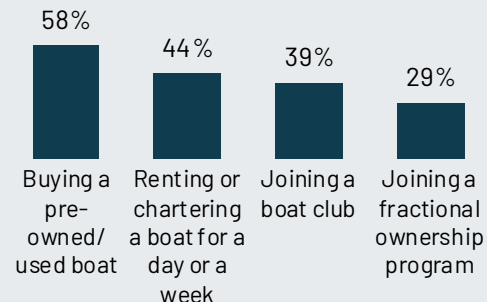


### ENCOURAGE PURCHASE



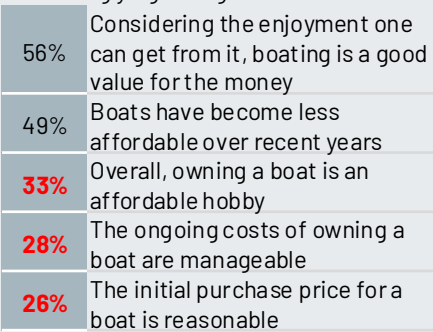
### INTEREST IN ALTERNATIVE MODELS

% Extremely/Very Interested



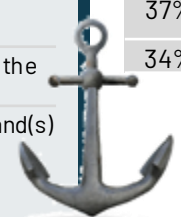
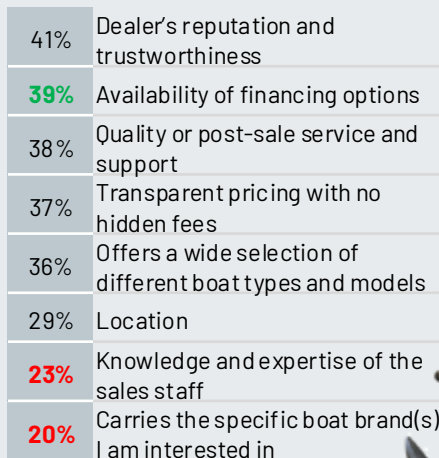
### AFFORDABILITY

% Strongly Agree/Agree



Never Attended Recreational Boat Show (n=43)

### DEALER FACTORS

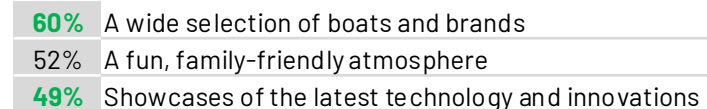


### ATTENDED BOAT SHOW

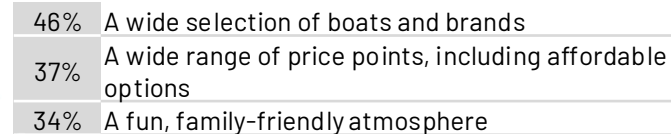


### PERCEPTIONS vs. WANTS

#### TOP PERCEPTIONS

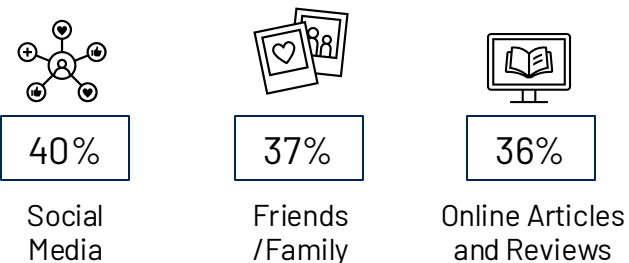


#### TOP WANTS



### INFLUENTIAL RESOURCES

Top Mentions



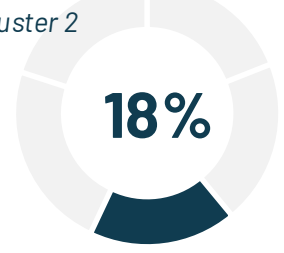
C1, C3, C4, C5, C6, C6b, C6c, C7, C8

● Over Index to Total Prospects (≥120%)  
● Under Index to Total Prospects (≤ 80%)

Indexing reported if Total Prospects%=5%+

# COST CONSCIOUS

Cluster 2



## THE WATER GENE

3 in 4 Cost Conscious Prospects had some of their best childhood memories involved being or near water with experiences spanning age and annual experiences through a variety of channels.

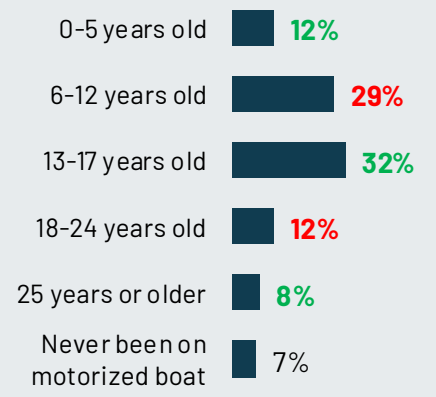
### UPBRINGING AND EXPOSURE TO WATER

% Strongly Agree/Agree

- 59% Growing up, I had frequent exposure to recreational boating
- 73% Some of my best childhood memories involved being on or near the water

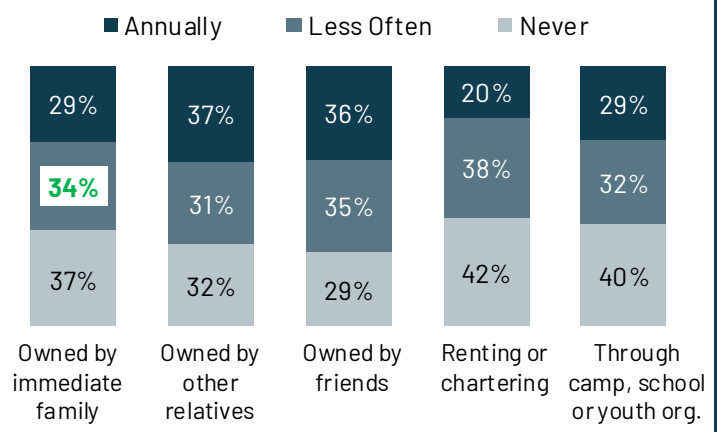
### AGE OF FIRST BOAT EXPERIENCE

13 Avg. Age

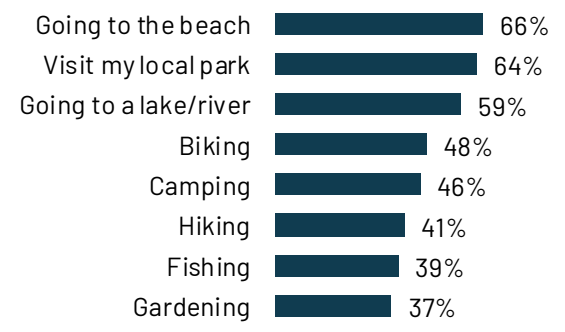


D1, D2, D3, D4, D5  
 ● Over Index to Total Prospects (≥120%)  
 ● Under Index to Total Prospects (≤ 80%)  
 Indexing reported if Total Prospects %=5%+

### VOLUME OF EXPERIENCES



### OTHER OUTDOOR INTERESTS\*



\*Top Mentions of Have Participated Participated as a Child and Now Percents Reported

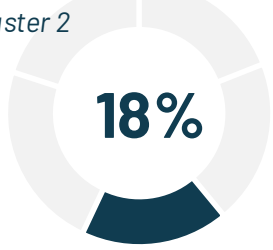
### BOATING MEMORIES AND SENTIMENT

Mean Value



# COST CONSCIOUS

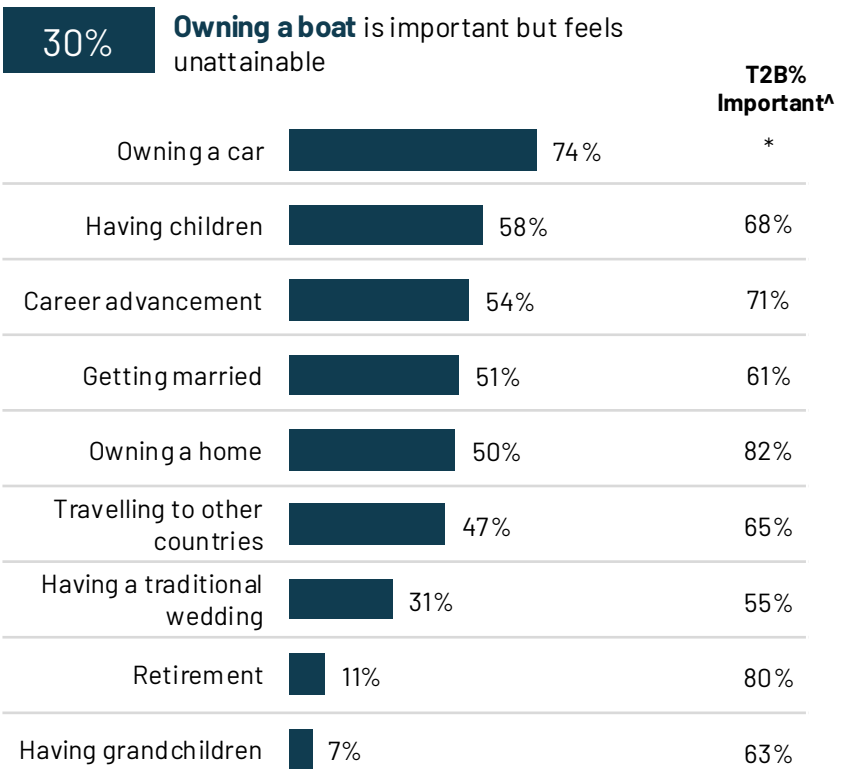
Cluster 2



## PERSONAL MILESTONES & SOCIAL MEDIA

Cost-Conscious Prospects spend less time on social media than other prospects but across the same platforms. Due to their financial status, they are less likely to spend on key discretionary activities.

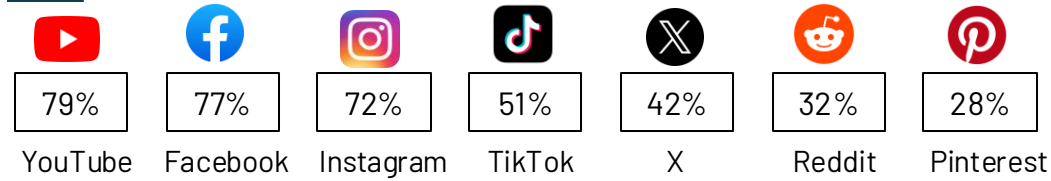
### LIFE MILESTONES AND IMPORTANCE



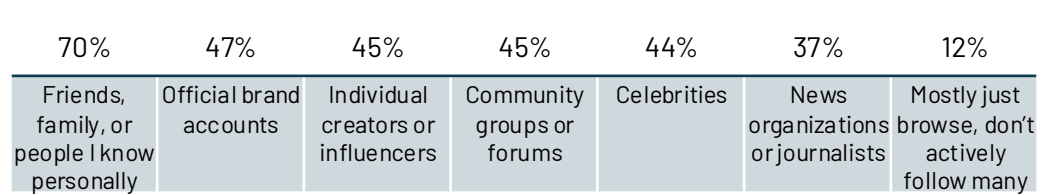
\*Base too low to report (n<30) ^Important and working toward it/ but feels unattainable  
H0.E1, E2, E3a, E3, E4, MU16, MU17

● Over Index to Total Prospects (≥120%) ● Under Index to Total Prospects (≤ 80%)  
Indexing reported if Total Prospects%=5%+

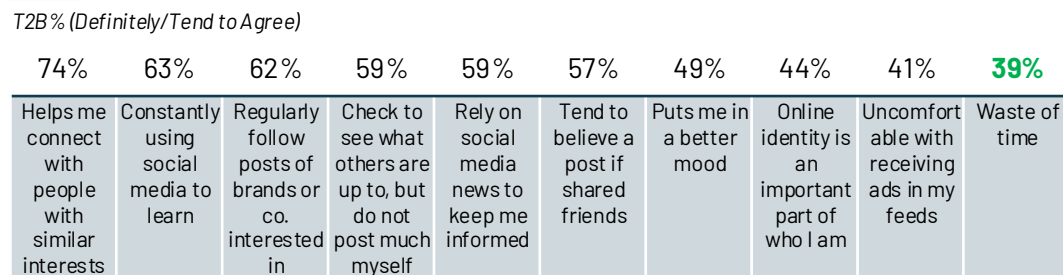
### SOCIAL MEDIA USAGE



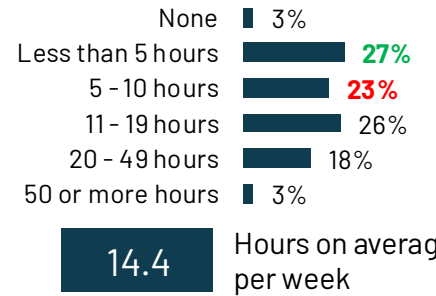
### ACCOUNTS FOLLOWED



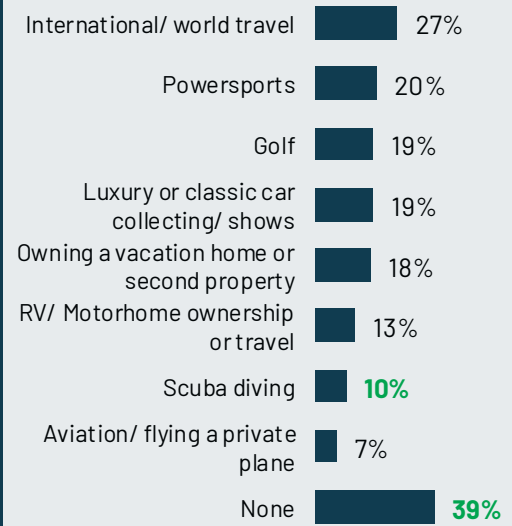
### SOCIAL MEDIA ATTITUDES



### SOCIAL MEDIA WEEKLY USAGE



### DISCRETIONARY ACTIVITIES



# COST CONSCIOUS

Cluster 2

18%

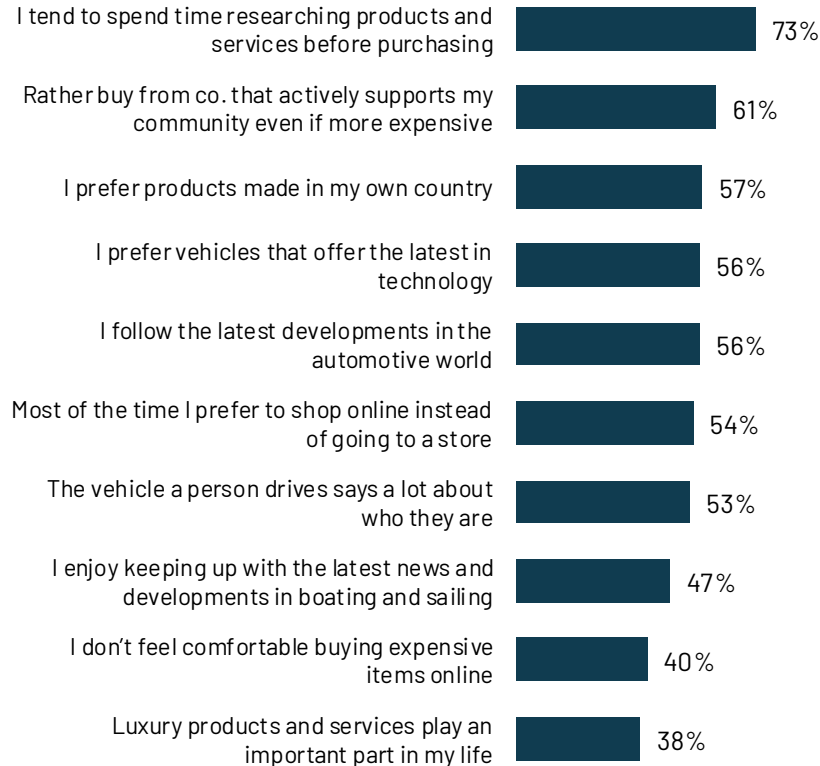


## ADDITIONAL ATTITUDINAL INSIGHTS & INTERESTS

These consumers are concerned about the current and future of the economy. They have a variety of interests that suggest they like to be on top of the latest news-worthy issues. About a third indicate they feel very/somewhat pessimistic about their finances and they are more likely to be liberal in their political affiliations.

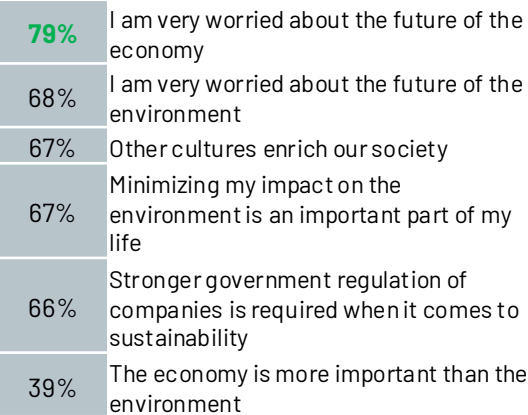
### PERSONAL ATTITUDES

T2B% (Definitely/Tend to Agree)

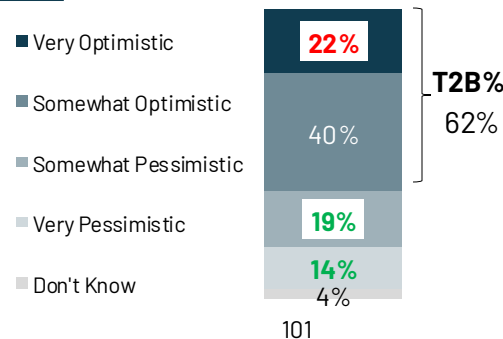


### ECONOMY & ENVIRONMENT

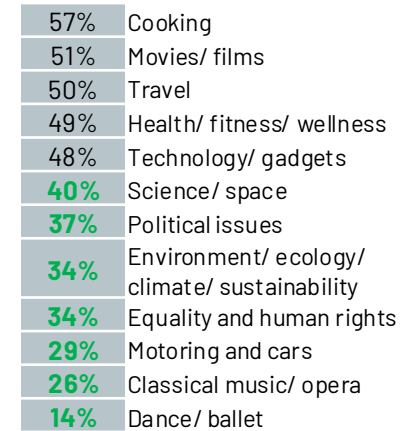
T2B% (Definitely/Tend to Agree)



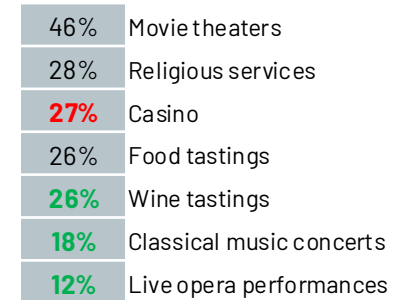
### OUTLOOK ON PERSONAL FINANCES



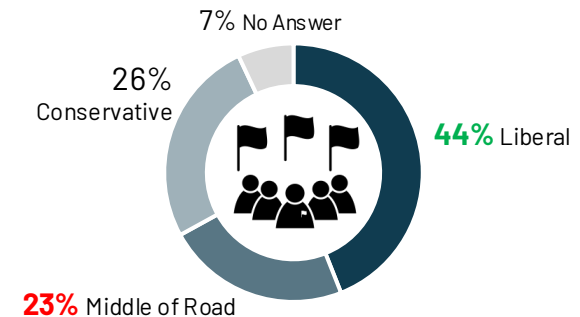
### TOP INTERESTS



### TOP EVENTS ATTENDED P12M



### POLITICAL AFFILIATION



FS1\_QAB1, GN1, F153, LL6, LL11, PA

● Over Index to Total Prospects (≥120%)  
● Under Index to Total Prospects (≤ 80%)

Indexing reported if Total Prospects %=5%+

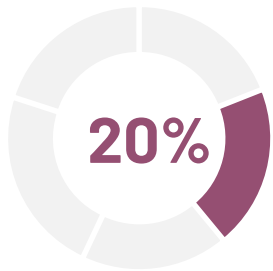
ATTITUDES & BELIEFS

INTERESTS & EVENTS



# TIME PRESSED

Cluster 5



## KEY OVERVIEW

Time Pressed Buyers are Millennials and Gen X, majority living in the South. They are less concerned about the cost or their experience with boating, and more concerned having enough time to use the boat. They have an estimated budget of \$66K for their purchase; average with other prospects.

### KEY DEMOGRAPHICS

**72%**  
Male

**27%**  
Female

**49%**  
Children in HH

**\$70.1k**  
Avg. Income

Discretionary Income

**21%** 90% necessities / 10% discretionary

**45%** 75% necessities / 25% discretionary

**23%** 50% necessities / 50% discretionary

Miscellaneous Demographic Question, S1b, B3, HQS5, S5b, B1, B4, B2, C9, C9b

- Over Index to Total Prospects (≥120%)
- Under Index to Total Prospects (≤ 80%)

Indexing reported if Total Prospects %=5%+



40 Avg. Age

Gen Z **19%**

Millennial **51%**

Gen X **22%**

Boomers **9%**

White **63%**

Black **19%**

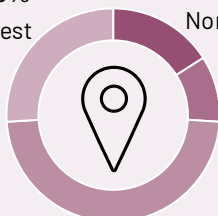
Hispanic **10%**

Other **8%**

26% West

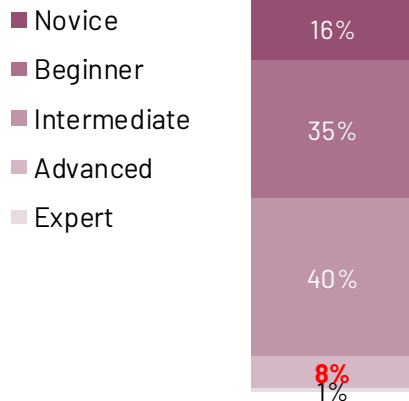
16% Northeast

**10%** Midwest

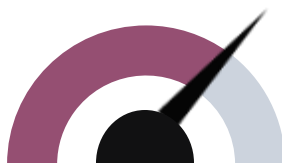


**48%** South

### KNOWLEDGE LEVEL

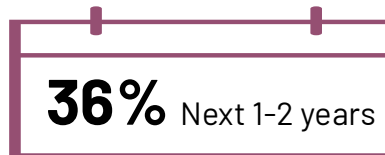


### LIKELIHOOD TO BUY BOAT



**70%**  
Likely to buy on average

### PURCHASE TIMEFRAME



### TOP BOATS INTERESTED IN

26%	Freshwater fishing boat
24%	Ski boat/ wake boat
22%	Fish-and-ski boat

### 'DISCOVER BOATING'

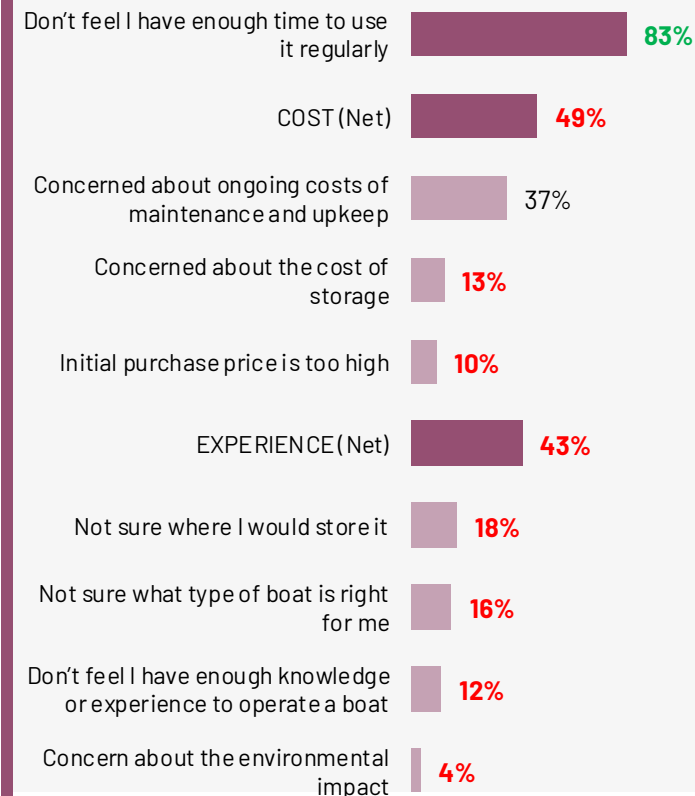
**19%** Aware of 'Discover Boating'

Aware of Discover Boating (n=19\*)  
\*Base too low to report (n<30)

### ESTIMATED BOAT BUDGET

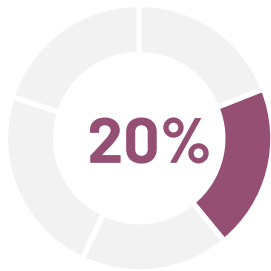
**\$66.3k**  
Average Budget

### BARRIERS



# TIME PRESSED

Cluster 5

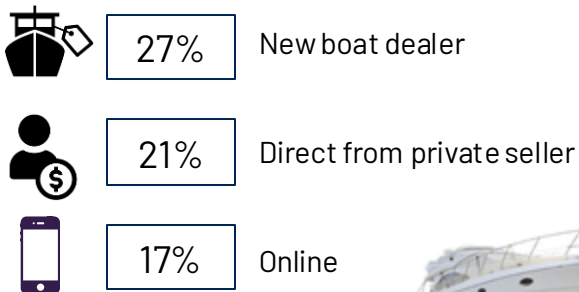


## PURCHASE JOURNEY

1 in 4 of Time Pressed Prospects plan to buy from a new boat dealer and are less likely to buy a pre-owned/ used boat. They are interested in transparency on pricing and while they agree that boats have become less affordable over time, they do feel that ongoing costs are manageable as well as the initial price being reasonable.

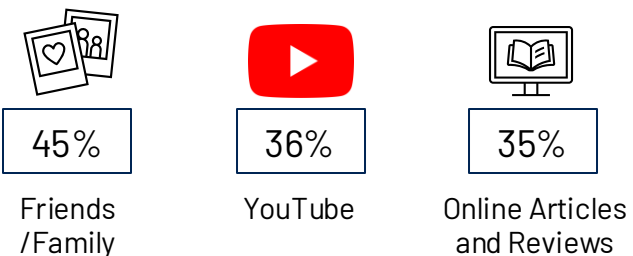
### PLANNED PURCHASE

Top Mentions

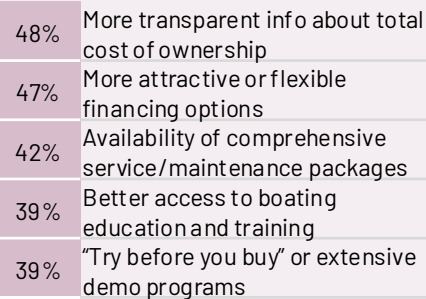


### INFLUENTIAL RESOURCES

Top Mentions

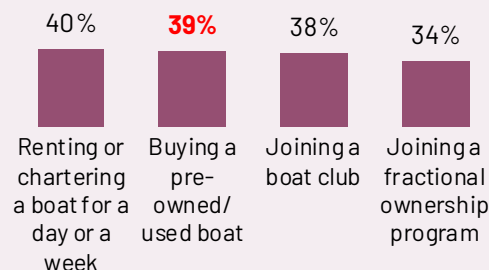


### ENCOURAGE PURCHASE



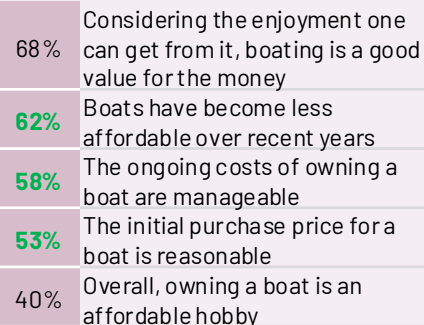
### INTEREST IN ALTERNATIVE MODELS

% Extremely/Very Interested



### AFFORDABILITY

% Strongly Agree/Agree

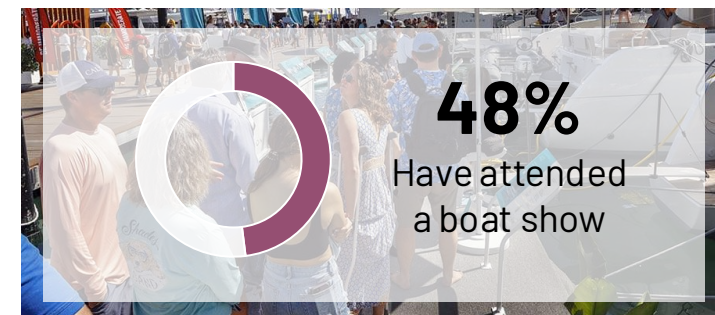


Never Attended Recreational Boat Show (n=53)

### DEALER FACTORS

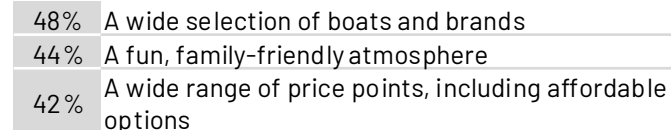


### ATTENDED BOAT SHOW

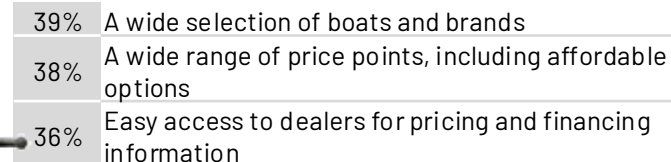


### PERCEPTIONS vs. WANTS

#### TOP PERCEPTIONS



#### TOP WANTS



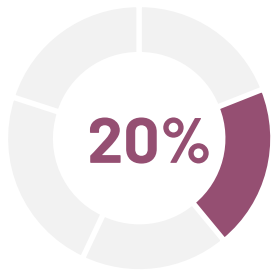
C1, C3, C4, C5, C6, C6b, C6c, C7, C8

● Over Index to Total Prospects (≥120%)  
● Under Index to Total Prospects (≤ 80%)

Indexing reported if Total Prospects %=5%+

# TIME PRESSED

Cluster 5



# THE WATER GENE

3 in 5 Time Pressed Prospects had frequent exposure to boating growing up, and around one third exposed annually through immediate/ other family.

## UPBRINGING AND EXPOSURE TO WATER

% Strongly Agree/Agree

62%

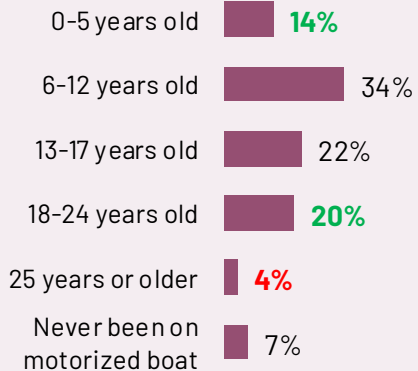
Growing up, I had frequent exposure to recreational boating

78%

Some of my best childhood memories involved being on or near the water

## AGE OF FIRST BOAT EXPERIENCE

13 Avg. Age



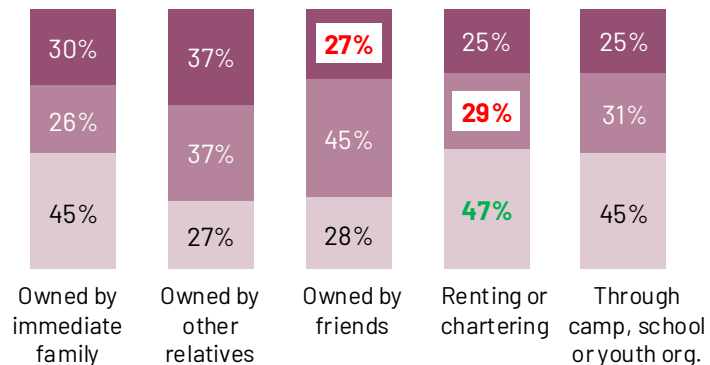
D1, D2, D3, D4, D5

● Over Index to Total Prospects (≥120%)  
● Under Index to Total Prospects (≤ 80%)

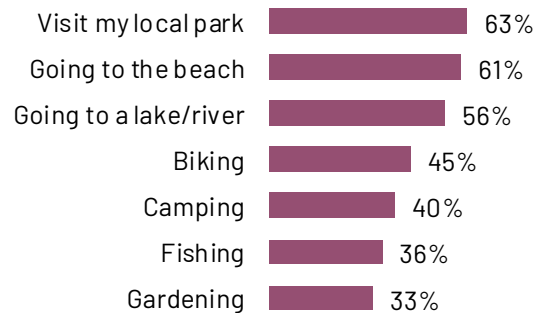
Indexing reported if Total Prospects %=5%+

## VOLUME OF EXPERIENCES

■ Annually ■ Less Often ■ Never



## OTHER OUTDOOR INTERESTS\*



\*Top Mentions of Have Participated Participated as a Child and Now Percents Reported

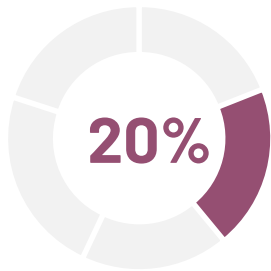
## BOATING MEMORIES AND SENTIMENT

Mean Value



# TIME PRESSED

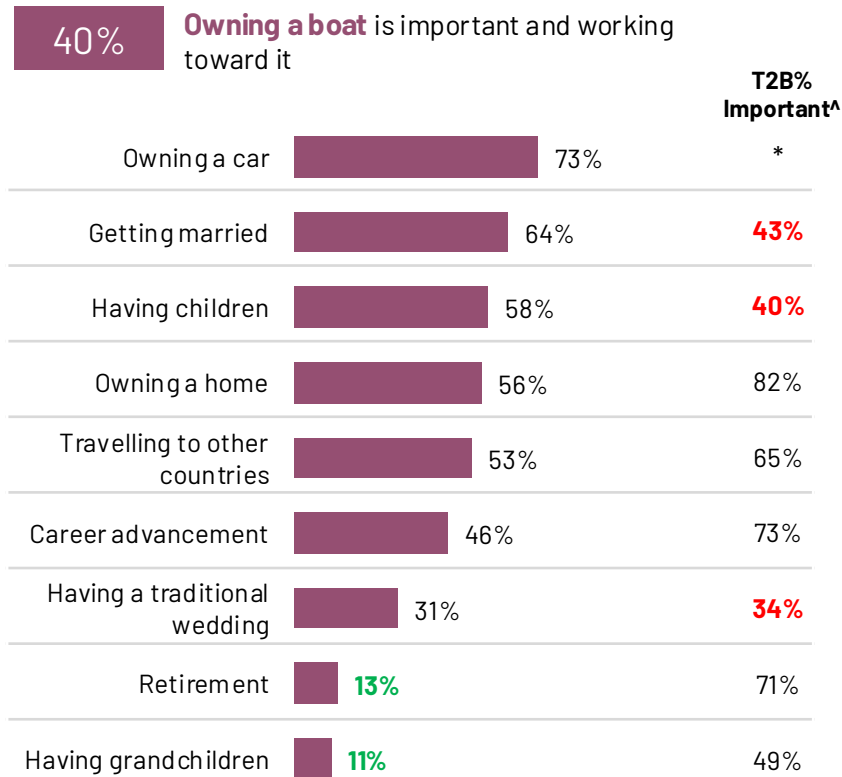
Cluster 5



## PERSONAL MILESTONES & SOCIAL MEDIA

Time Pressed Prospects display less traditional values with fewer indicating that getting married, having children and traditional weddings as important. These consumers are reachable across most social media platforms and spend an average amount of time per week on socials.

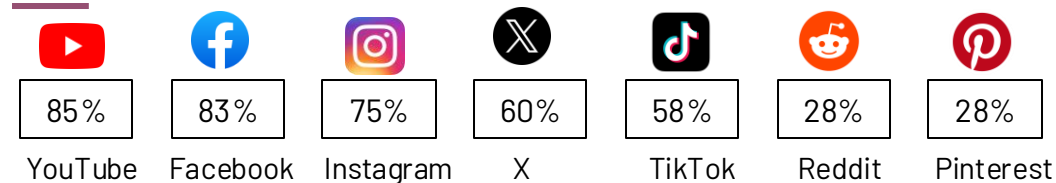
### LIFE MILESTONES AND IMPORTANCE



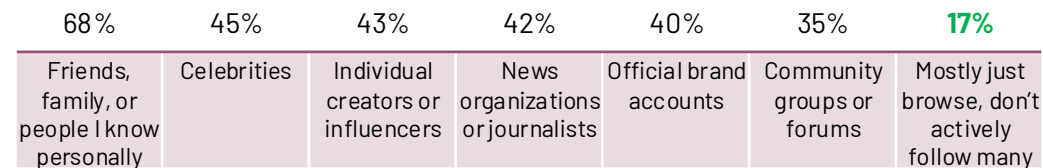
\*Base too low to report (n<30) ^Important and working toward it/ but feels unattainable HQ.E1, E2, E3a, E3, E4, MU16, MU17

● Over Index to Total Prospects (≥120%) ● Under Index to Total Prospects (≤ 80%) Indexing reported if Total Prospects%=5%+

### SOCIAL MEDIA USAGE

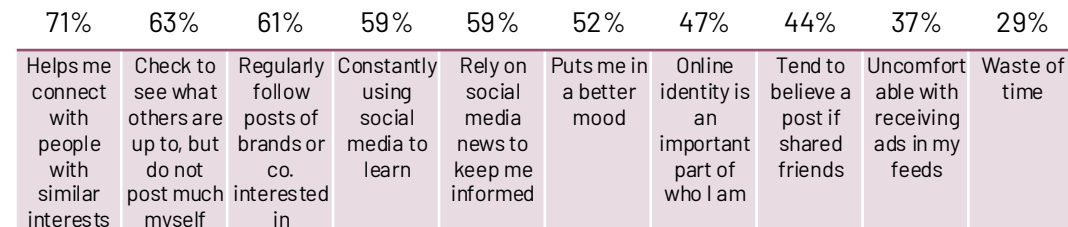


### ACCOUNTS FOLLOWED

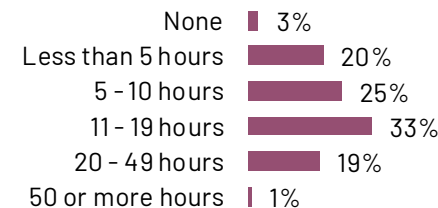


### SOCIAL MEDIA ATTITUDES

T2B% (Definitely/Tend to Agree)

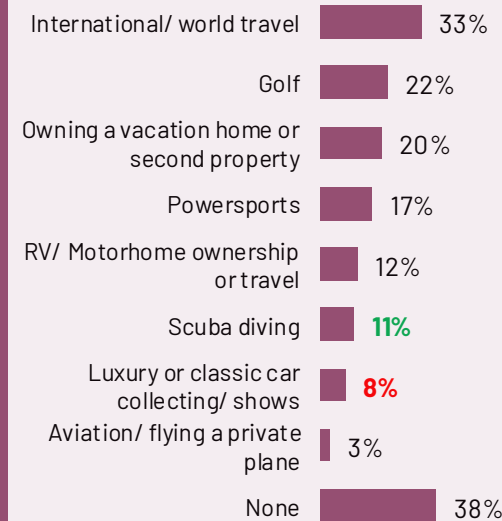


### SOCIAL MEDIA WEEKLY USAGE



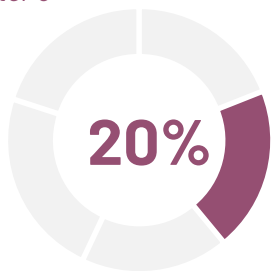
14.3 Hours on average per week

### DISCRETIONARY ACTIVITIES



# TIME PRESSED

Cluster 5

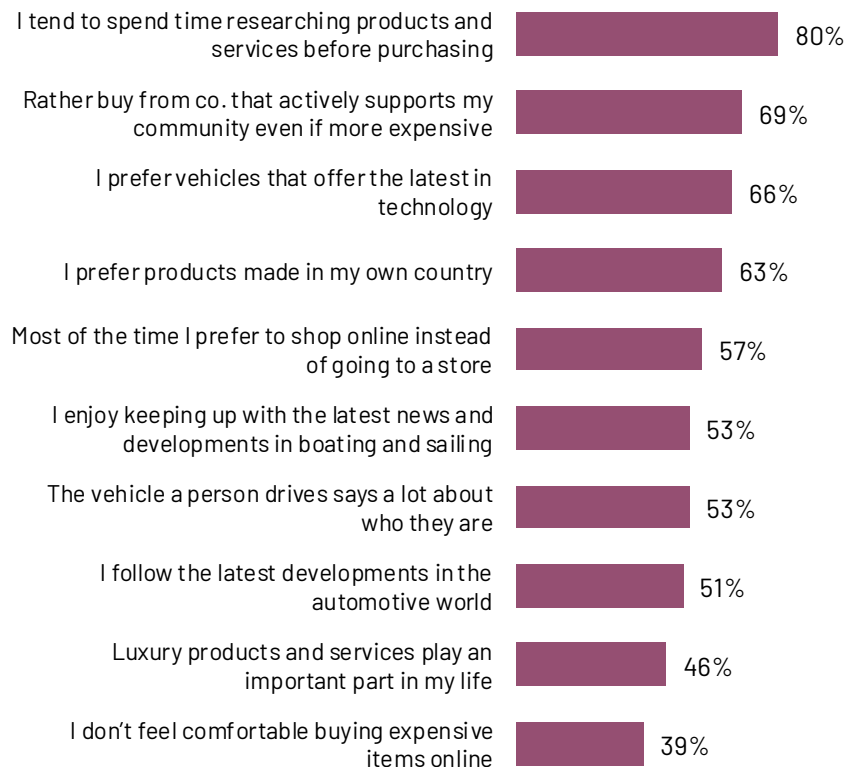


## ADDITIONAL ATTITUDINAL INSIGHTS & INTERESTS

4 in 5 Time Pressed Prospects spend time researching products/services before purchasing them. Additionally, they over index in their interest in business/ economics. Politically, they are balanced across parties.

### PERSONAL ATTITUDES

T2B% (Definitely/Tend to Agree)

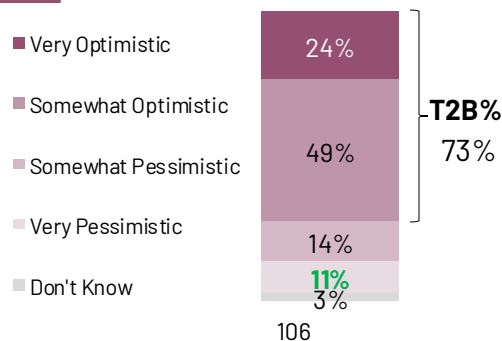


### ECONOMY & ENVIRONMENT

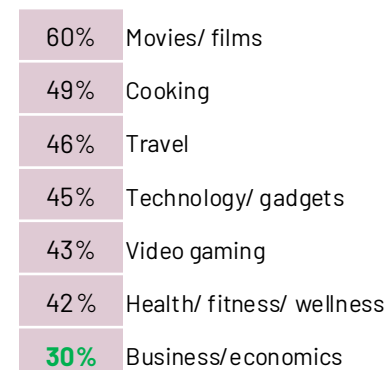
T2B% (Definitely/Tend to Agree)



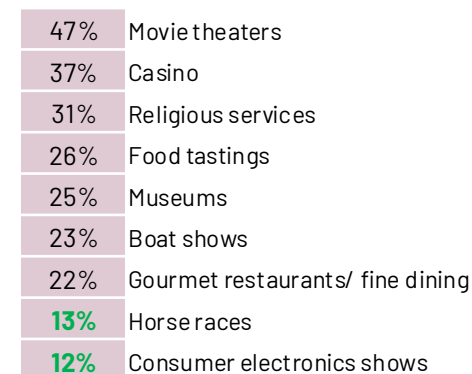
### OUTLOOK ON PERSONAL FINANCES



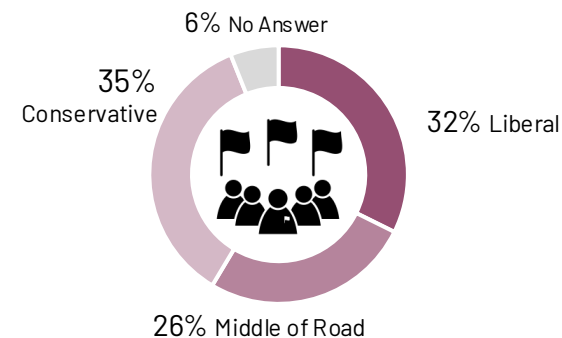
### TOP INTERESTS



### TOP EVENTS ATTENDED P12M



### POLITICAL AFFILIATION



FS1\_Q0AB1, GN1, F153, LL6, LL11, PA

● Over Index to Total Prospects (≥120%)  
● Under Index to Total Prospects (≤ 80%)

Indexing reported if Total Prospects % = 5%+

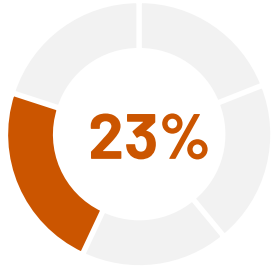
ATTITUDES & BELIEFS

INTERESTS & EVENTS



# INEXPERIENCED

Cluster 4

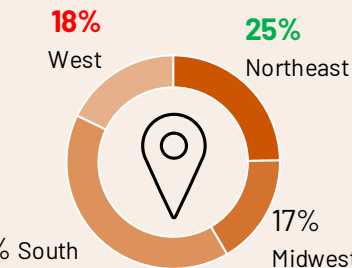
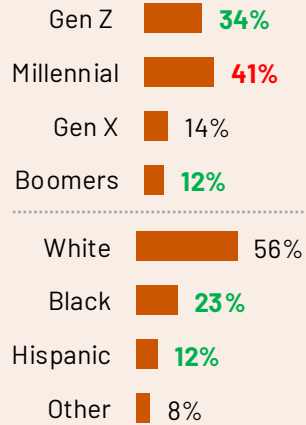


## KEY OVERVIEW

Inexperienced Buyers who are ready for a sales discussion are Gen Z or Boomers with 25% of their income as discretionary. They reside mainly in the Northeast and have novice to beginner boating experience. They are still trying to decide what type of boat to buy and are ready to buy in the next 1-2 years.

## KEY DEMOGRAPHICS

- 61%** Male
- 38%** Female
- 42%** Children in HH
- \$68.5k** Avg. Income

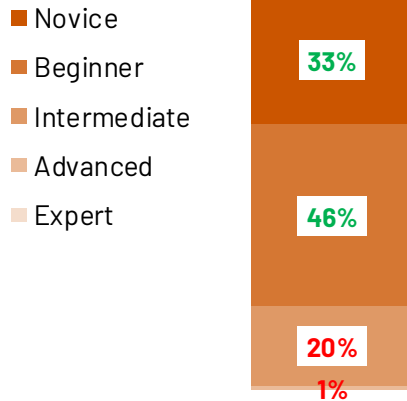


Miscellaneous Demographic Question, S1b, B3, HQS5, S5b, B1, B4, B2, C9, C9b

● Over Index to Total Prospects (≥120%)  
● Under Index to Total Prospects (≤ 80%)

Indexing reported if Total Prospects%=5%+

## KNOWLEDGE LEVEL



## LIKELIHOOD TO BUY BOAT

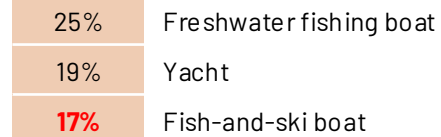


Likely to buy on average

## PURCHASE TIMEFRAME



## TOP BOATS INTERESTED IN



## 'DISCOVER BOATING'

**16%** Aware of 'Discover Boating'  
Aware of Discover Boating (n=18\*)  
\*Base too low to report (n<30)

## ESTIMATED BOAT BUDGET

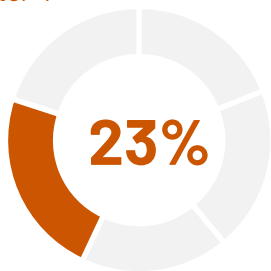


## BARRIERS



# INEXPERIENCED

Cluster 4

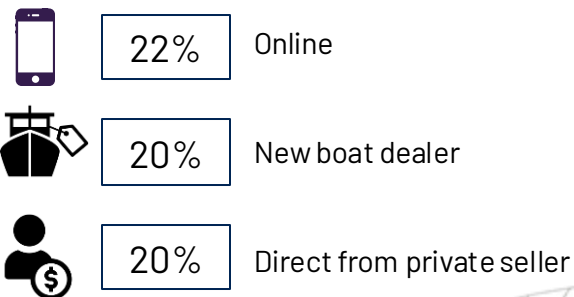


# PURCHASE JOURNEY

Unexperienced Prospects are as likely to purchase from a new boat dealer, online or direct from private seller and are likely to be influenced by friends and family on their purchase. They are **looking for more education/training** such as on-the-water experiences and test drives.

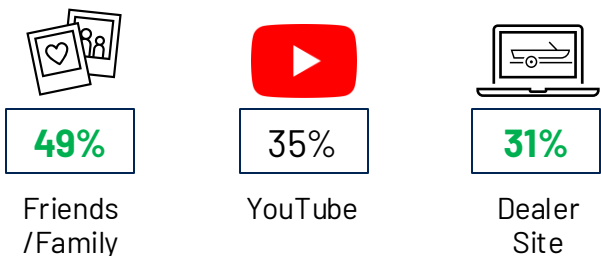
## PLANNED PURCHASE

Top Mentions



## INFLUENTIAL RESOURCES

Top Mentions

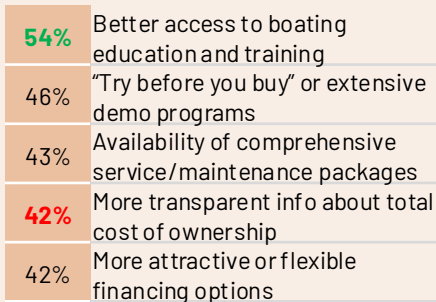


C1, C3, C4, C5, C6, C6b, C6c, C7, C8

● Over Index to Total Prospects (≥120%)  
● Under Index to Total Prospects (≤ 80%)

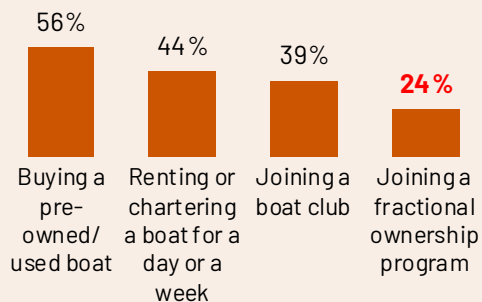
Indexing reported if Total Prospects%=5%+

## ENCOURAGE PURCHASE



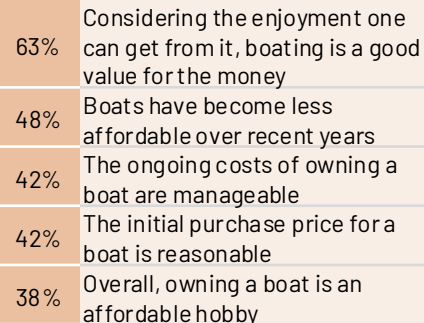
## INTEREST IN ALTERNATIVE MODELS

% Extremely/Very Interested



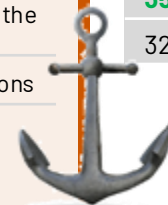
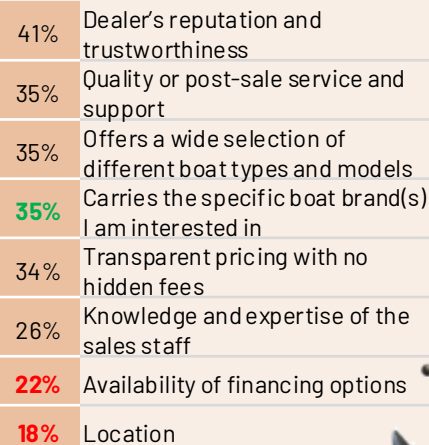
## AFFORDABILITY

% Strongly Agree/Agree



Never Attended Recreational Boat Show (n=79)

## DEALER FACTORS

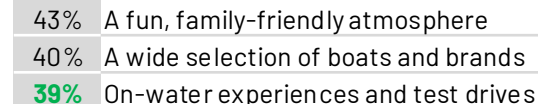


## ATTENDED BOAT SHOW

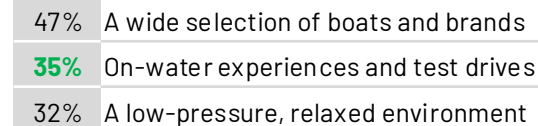


## PERCEPTIONS vs. WANTS

### TOP PERCEPTIONS

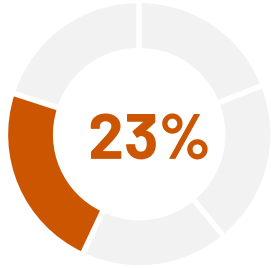


### TOP WANTS



# INEXPERIENCED

Cluster 4



# THE WATER GENE

2 in 5 Inexperienced Prospects had frequent exposure to boating growing up – slightly fewer than other prospects, but comparable annual experiences.

## UPBRINGING AND EXPOSURE TO WATER

% Strongly Agree/Agree

40%

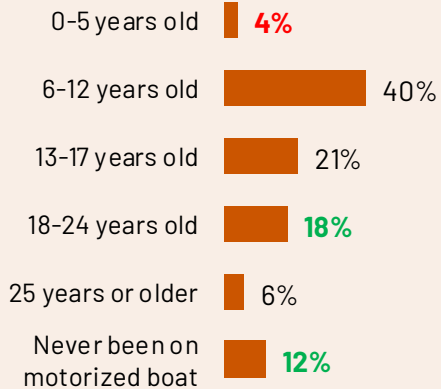
Growing up, I had frequent exposure to recreational boating

64%

Some of my best childhood memories involved being on or near the water

## AGE OF FIRST BOAT EXPERIENCE

14 Avg. Age



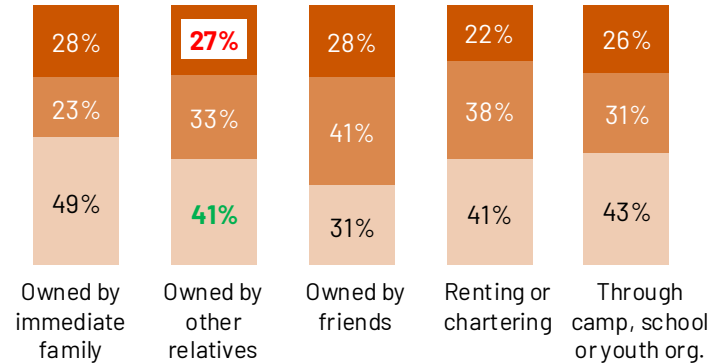
D1, D2, D3, D4, D5

● Over Index to Total Prospects (≥120%)  
● Under Index to Total Prospects (≤ 80%)

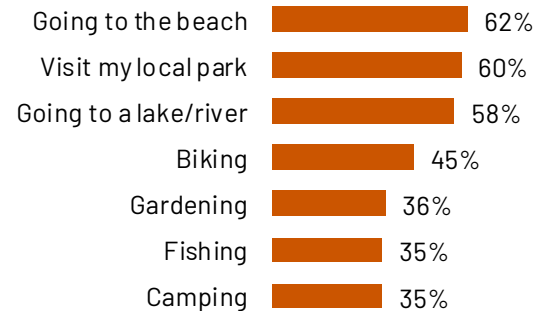
Indexing reported if Total Prospects %=5%+

## VOLUME OF EXPERIENCES

■ Annually ■ Less Often ■ Never



## OTHER OUTDOOR INTERESTS\*



\*Top Mentions of Have Participated Participated as a Child and Now Percents Reported

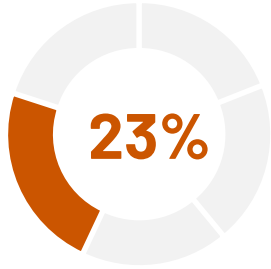
## BOATING MEMORIES AND SENTIMENT

Mean Value



# INEXPERIENCED

Cluster 4



## PERSONAL MILESTONES & SOCIAL MEDIA

Inexperienced Prospects are less active on social media. Majority spend **10 hours or less** weekly, primarily using it to connect with others. They have experienced similar life milestones and deprioritize most discretionary activities.

### LIFE MILESTONES AND IMPORTANCE

52%

Owning a boat is important and working toward it

T2B% Important\*

Owning a car	74%	*
Having children	59%	59%
Owning a home	53%	77%
Getting married	48%	56%
Travelling to other countries	48%	75%
Career advancement	40%	68%
Having a traditional wedding	27%	45%
Retirement	12%	68%
Having grandchildren	10%	57%

HQ.E1, E2, E3a, E3, E4, MU16, MU17

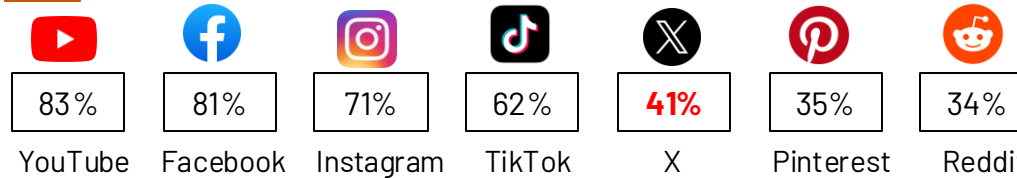
● Over Index to Total Prospects (≥120%) ● Under Index to Total Prospects (≤ 80%)

Indexing reported if Total Prospects %=5%+

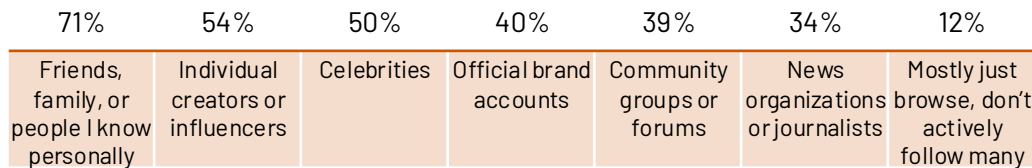
\*Base too low to report (n<30)

^Important and working toward it/ but feels unattainable

### SOCIAL MEDIA USAGE

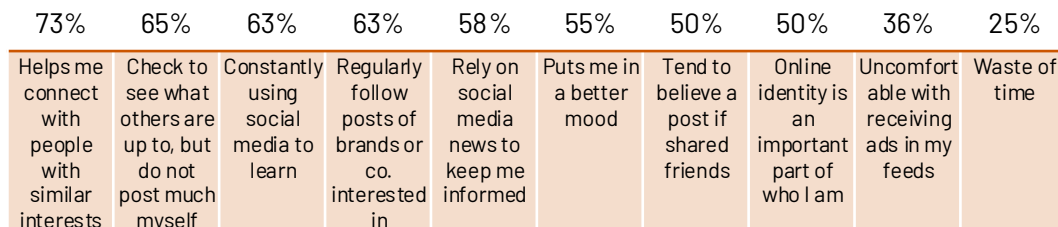


### ACCOUNTS FOLLOWED

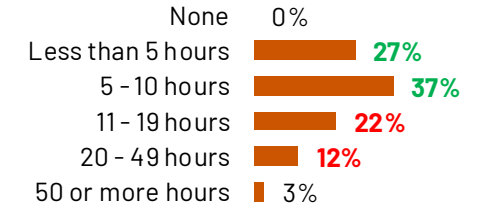


### SOCIAL MEDIA ATTITUDES

T2B% (Definitely/Tend to Agree)



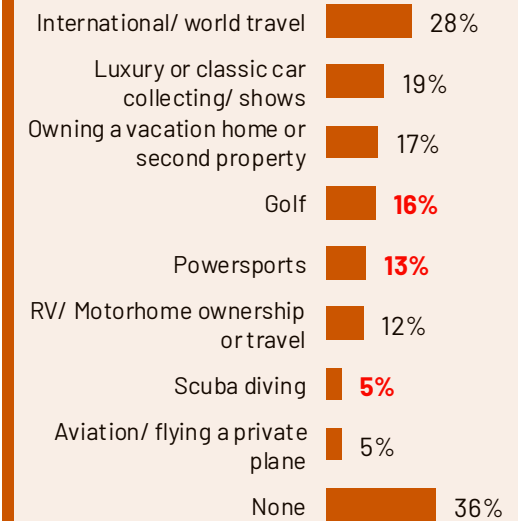
### SOCIAL MEDIA WEEKLY USAGE



12.3

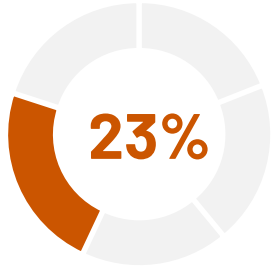
Hours on average per week

### DISCRETIONARY ACTIVITIES



# INEXPERIENCED

Cluster 4

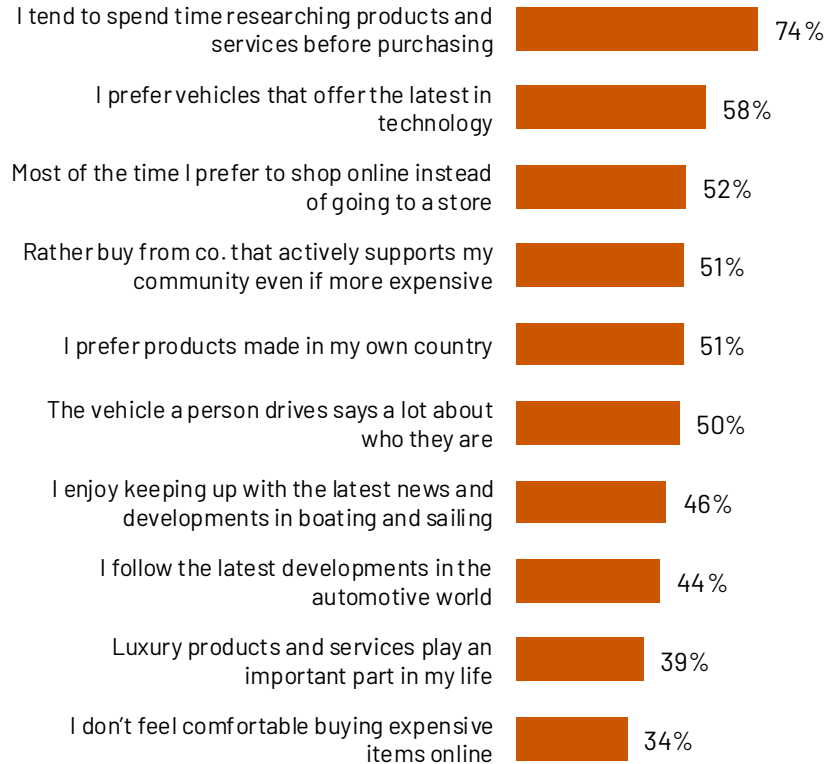


## ADDITIONAL ATTITUDINAL INSIGHTS & INTERESTS

Inexperienced Prospects political affiliation tends to be more middle of the road and enjoy attending gourmet restaurants, garden/ flower, dance and antique shows. Close to three quarters have a very/somewhat optimistic outlook on their personal finance.

### PERSONAL ATTITUDES

T2B% (Definitely/Tend to Agree)

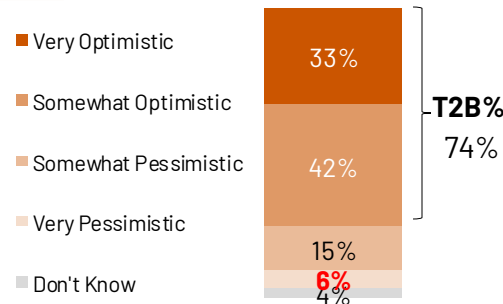


### ECONOMY & ENVIRONMENT

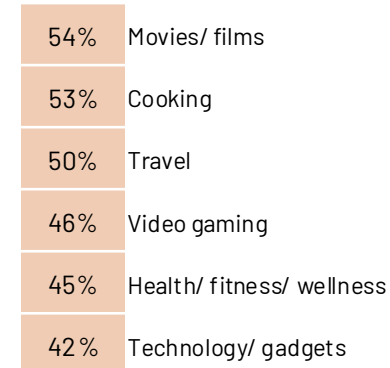
T2B% (Definitely/Tend to Agree)



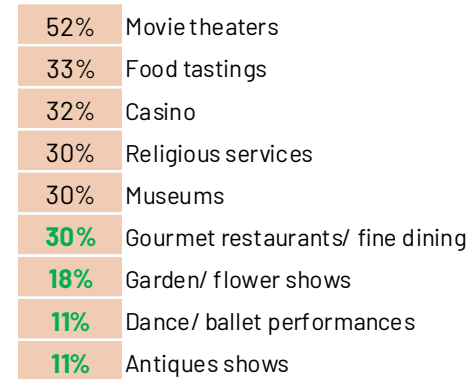
### OUTLOOK ON PERSONAL FINANCES



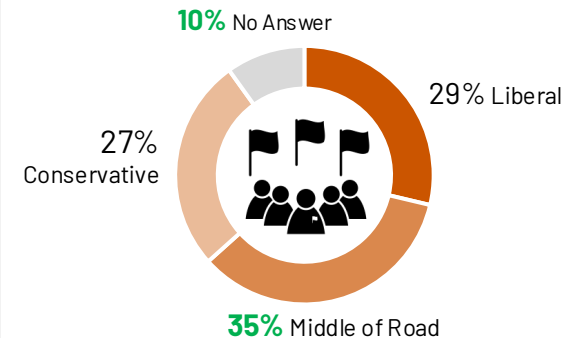
### TOP INTERESTS



### TOP EVENTS ATTENDED P12M



### POLITICAL AFFILIATION



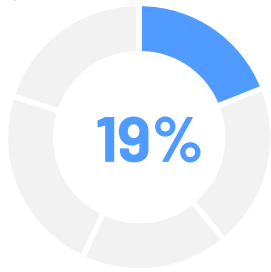
FS1\_QAB1, GN1, F153, LL6, LL11, PA

● Over Index to Total Prospects (≥120%)  
● Under Index to Total Prospects (≤ 80%)

Indexing reported if Total Prospects %=5%+

# SALES READY

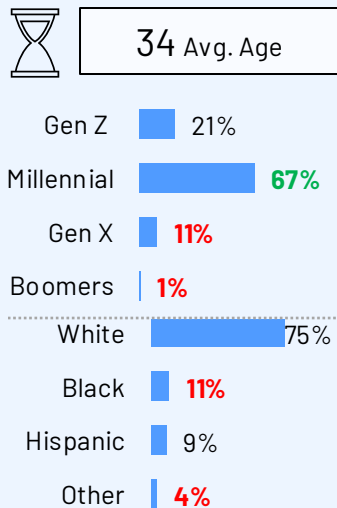
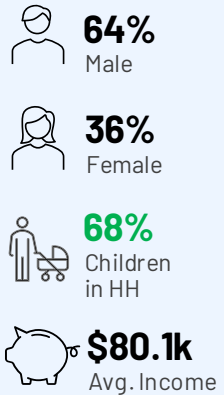
Cluster 1



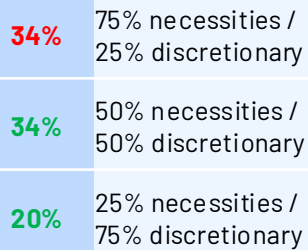
## KEY OVERVIEW

Prospective Buyers who are ready for a sales discussion are millennials with kids in the home and at least 50% of their income is discretionary. They reside in the west and south and have at least some experience boating. With a high income they have few barriers and are ready to buy in the next 12-24 months.

## KEY DEMOGRAPHICS



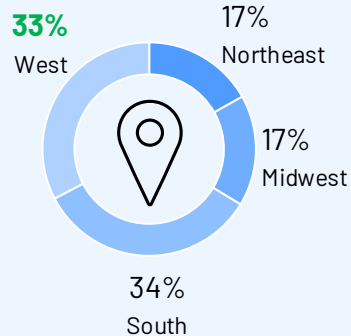
### Discretionary Income



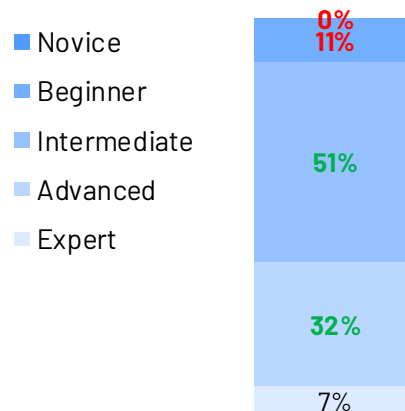
Miscellaneous Demographic Question, S1b, B3, HQS5, S5b, B1, B4, B2, C9, C9b

● Over Index to Total Prospects (≥120%)  
● Under Index to Total Prospects (≤ 80%)

Indexing reported if Total Prospects %=5%+



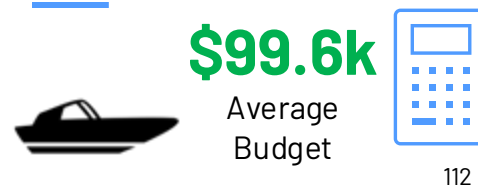
## KNOWLEDGE LEVEL



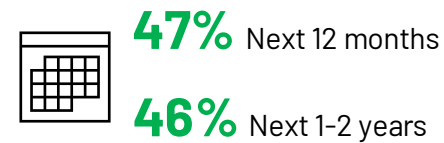
## LIKELIHOOD TO BUY BOAT



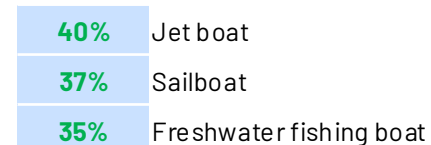
## ESTIMATED BOAT BUDGET



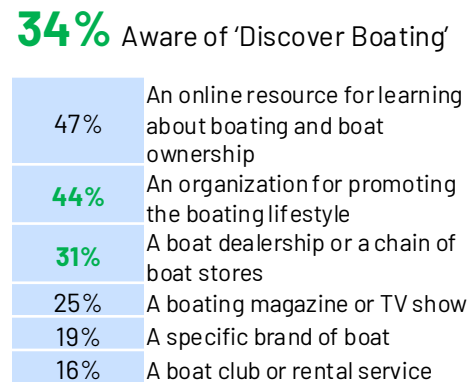
## PURCHASE TIMEFRAME



## TOP BOATS INTERESTED IN

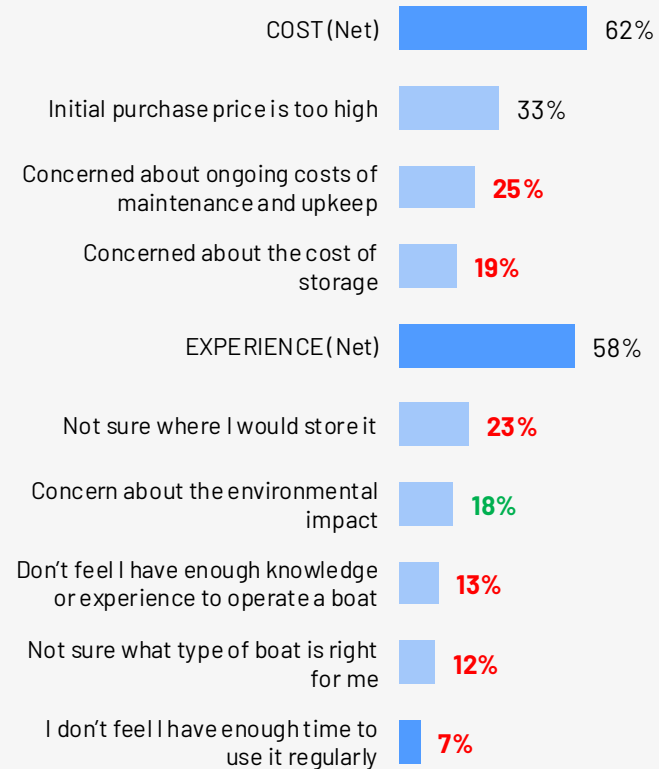


## 'DISCOVER BOATING'



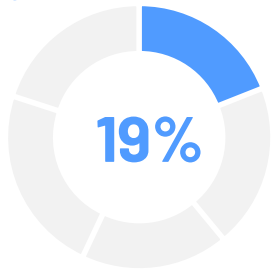
Aware of Discover Boating (n=32)

## BARRIERS



# SALES READY

Cluster 1



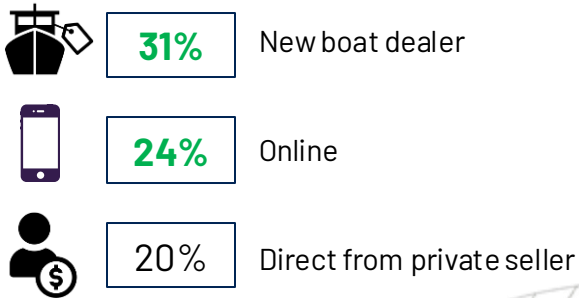
# PURCHASE JOURNEY

1 in 4 of Sales-Ready Prospects plan to buy online, relying on resources such as social media, YouTube and websites. In addition to outright ownership, alternative models of ownership are appealing as they can see the benefit of owning a boat.

Owners should know they seen quality post-sales services and wide selections.

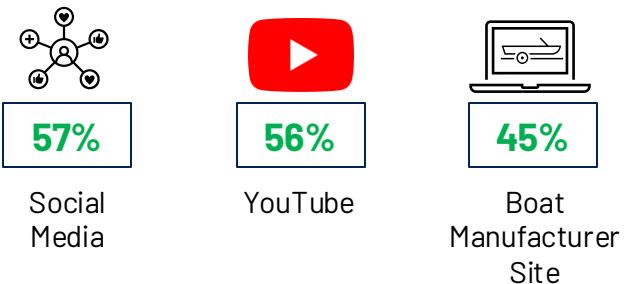
## PLANNED PURCHASE

Top Mentions



## INFLUENTIAL RESOURCES

Top Mentions



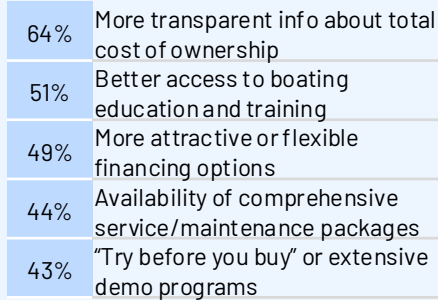
C1, C3, C4, C5, C6, C6b, C6c, C7, C8

● Over Index to Total Prospects (≥120%)

● Under Index to Total Prospects (≤ 80%)

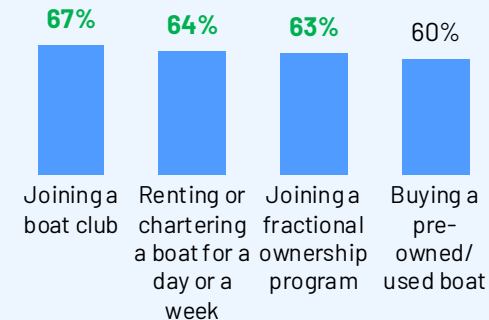
Indexing reported if Total Prospects%=5%+

## ENCOURAGE PURCHASE



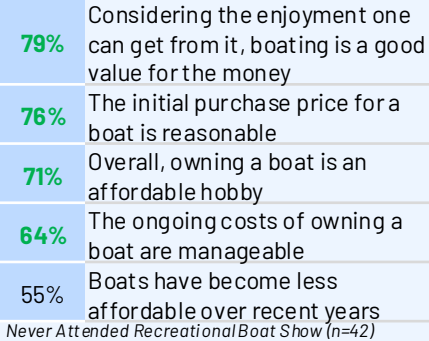
## INTEREST IN ALTERNATIVE MODELS

% Extremely/Very Interested

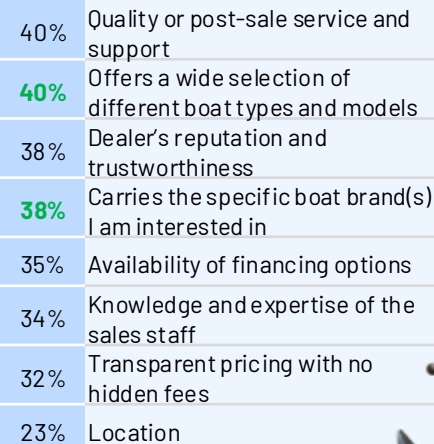


## AFFORDABILITY

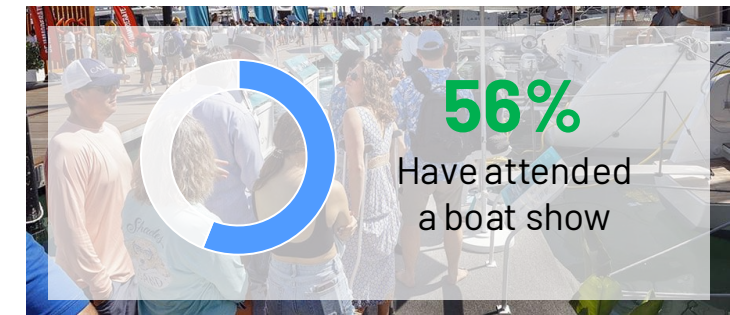
% Strongly Agree/Agree



## DEALER FACTORS

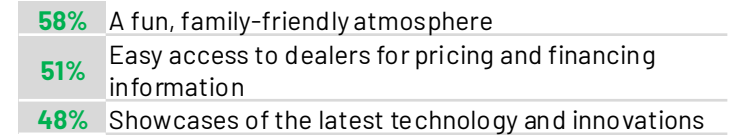


## ATTENDED BOAT SHOW

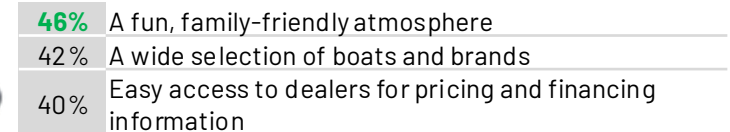


## PERCEPTIONS vs. WANTS

### TOP PERCEPTIONS

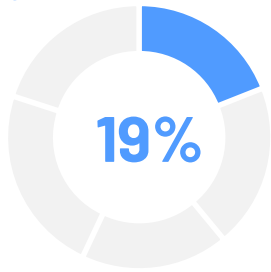


### TOP WANTS



# SALES READY

Cluster 1



## THE WATER GENE

3 in 4 Sales Ready Prospects had frequent exposure to boating growing up, and through in life with a variety of annual exposure.

### UPBRINGING AND EXPOSURE TO WATER

% Strongly Agree/Agree

74%

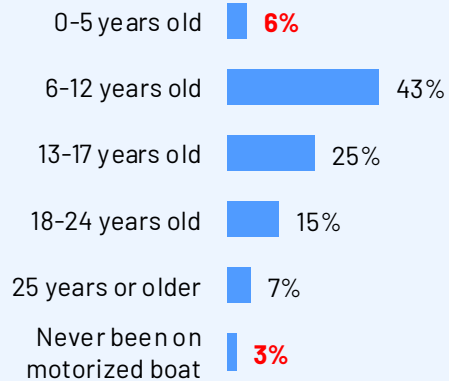
Growing up, I had frequent exposure to recreational boating

83%

Some of my best childhood memories involved being on or near the water

### AGE OF FIRST BOAT EXPERIENCE

13 Avg. Age

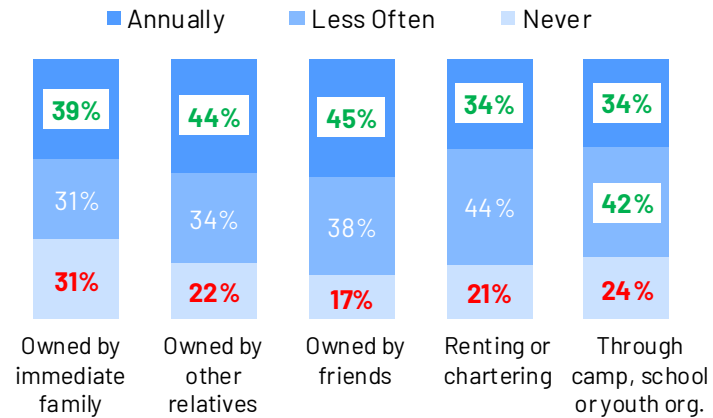


D1, D2, D3, D4, D5

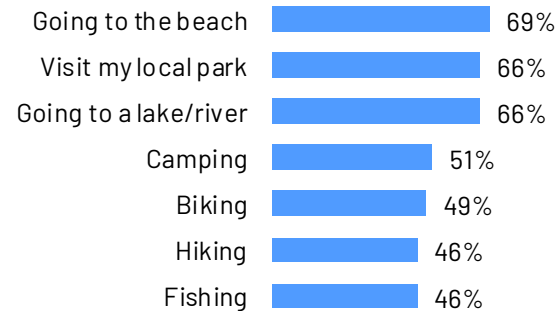
● Over Index to Total Prospects (≥120%)  
● Under Index to Total Prospects (≤ 80%)

Indexing reported if Total Prospects %=5%+

### VOLUME OF EXPERIENCES



### OTHER OUTDOOR INTERESTS\*



\*Top Mentions of Have Participated Participated as a Child and Now Percents Reported

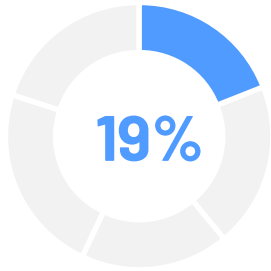
### BOATING MEMORIES AND SENTIMENT

Mean Value



# SALES READY

Cluster 1



## PERSONAL MILESTONES & SOCIAL MEDIA

Majority of these prospects display traditional values, already owning a home and want children, marriage/wedding and travel. They are active across all social media, engaging with brands, communities and friends/family.

### LIFE MILESTONES AND IMPORTANCE

68%

Owning a boat is important and working toward it

T2B% Important<sup>A</sup>

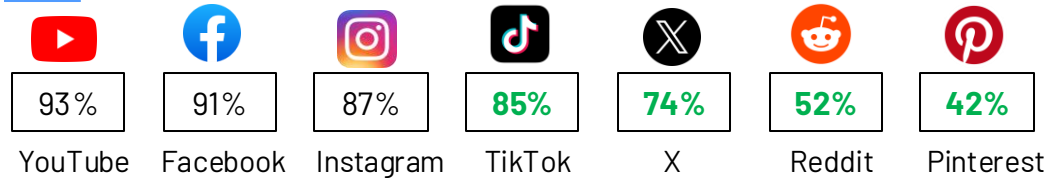
Owning a car	84%	*
Owning a home	72%	*
Having children	66%	84%
Getting married	58%	65%
Travelling to other countries	58%	78%
Career advancement	53%	78%
Having a traditional wedding	25%	62%
Having grandchildren	4%	71%
Retirement	3%	74%

HQ.E1, E2, E3a, E3, E4, MU16, MU17

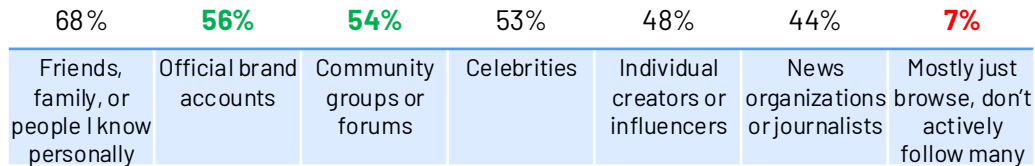
● Over Index to Total Prospects (≥120%) ● Under Index to Total Prospects (≤ 80%)

Indexing reported if Total Prospects %=5%+

### SOCIAL MEDIA USAGE

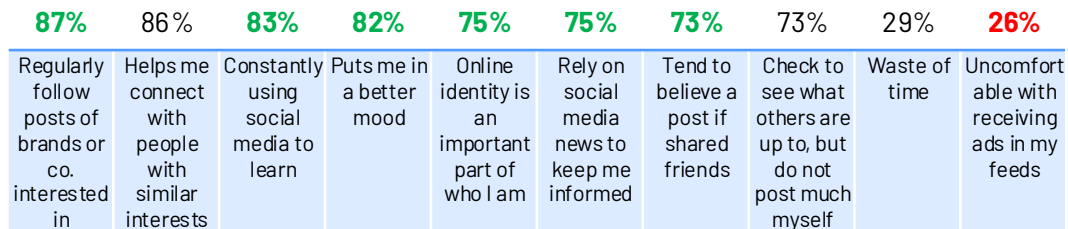


### ACCOUNTS FOLLOWED

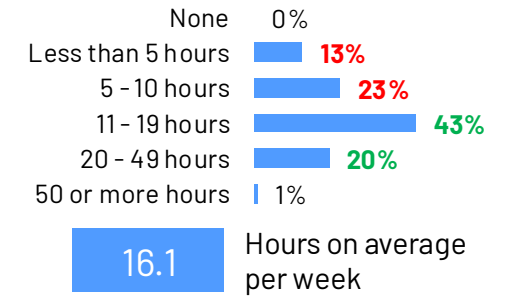


### SOCIAL MEDIA ATTITUDES

T2B% (Definitely/Tend to Agree)



### SOCIAL MEDIA WEEKLY USAGE

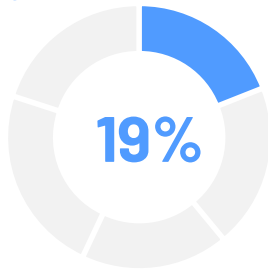


### DISCRETIONARY ACTIVITIES



# SALES READY

Cluster 1

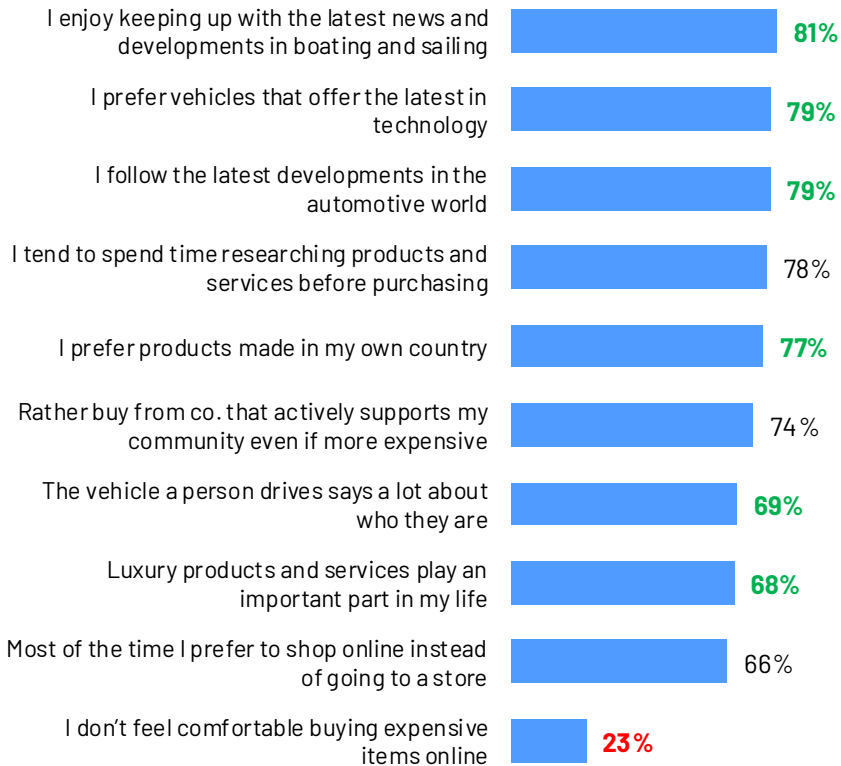


## ADDITIONAL ATTITUDINAL INSIGHTS & INTERESTS

Sales Ready Prospects are engaged with boating news, relevant technology and innovations. They spend time researching and enjoy aspects of luxury. They have a variety of interests and have strong opinions about the economy.

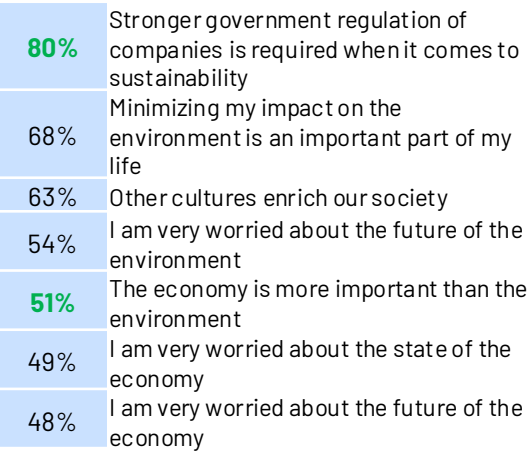
### PERSONAL ATTITUDES

T2B% (Definitely/Tend to Agree)

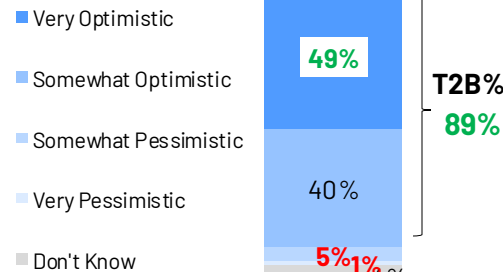


### ECONOMY & ENVIRONMENT

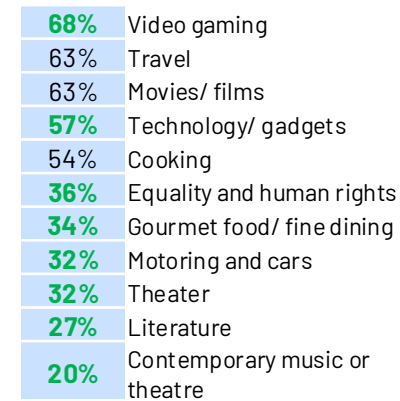
T2B% (Definitely/Tend to Agree)



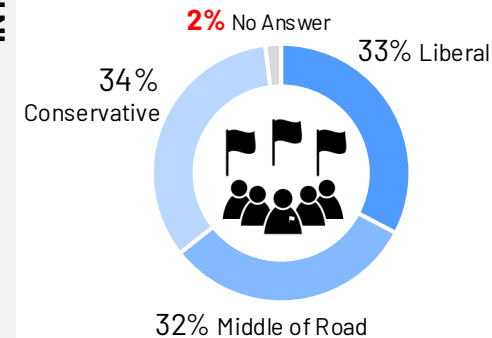
### OUTLOOK ON PERSONAL FINANCES



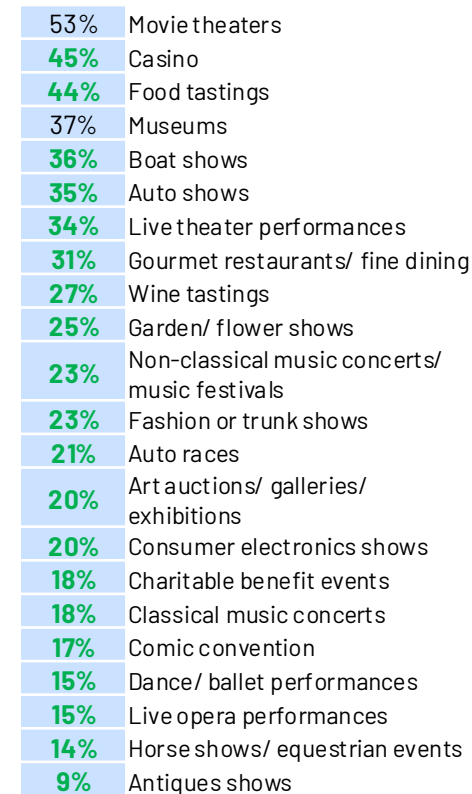
### TOP INTERESTS



### POLITICAL AFFILIATION



### TOP EVENTS ATTENDED P12M



FS1\_QAB1, GN1, F153, LL6, LL11, PA

Over Index to Total Prospects (≥120%)  
Under Index to Total Prospects (≤ 80%)

Indexing reported if Total Prospects %=5%+



# PRICED OUT

Cluster 3



# KEY OVERVIEW

Prospective Buyers are equally men and women and are slightly older. They are more likely to be in the Midwest and would be ready to buy in the next 3+ years. They are novice to beginner boaters and are concerned about the initial price and not sure where to store it. They have the lowest budget.

## KEY DEMOGRAPHICS

**50%**  
Male

**50%**  
Female

**38%**  
Children in HH

**\$70.7k**  
Avg. Income

Discretionary Income

**56%** 75% necessities / 25% discretionary



37 Avg. Age

Gen Z 29%

Millennial 46%

Gen X 15%

Boomers 10%

White 76%

Black 13%

Hispanic 6%

Other 5%

21% West

16% Northeast

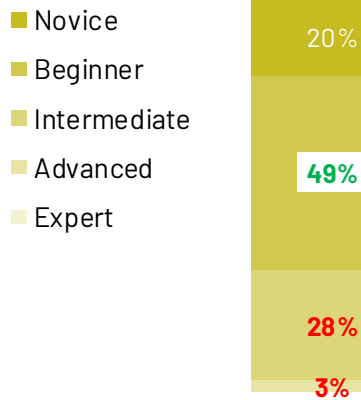


37% South

Miscellaneous Demographic Question, S1b, B3, HQS5, S5b, B1, B4, B2, C9, C9b

● Over Index to Total Prospects (≥120%)  
● Under Index to Total Prospects (≤ 80%)  
Indexing reported if Total Prospects%=5%+

## KNOWLEDGE LEVEL



## LIKELIHOOD TO BUY BOAT



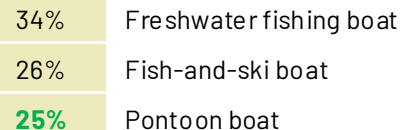
Likely to buy on average

## PURCHASE TIMEFRAME

**38%** Next 3-5 years

**35%** Next 6+ years

## TOP BOATS INTERESTED IN



## 'DISCOVER BOATING'

**14%** Aware of 'Discover Boating'

Aware of Discover Boating (n=14\*)  
\*Base too low to report (n<30)

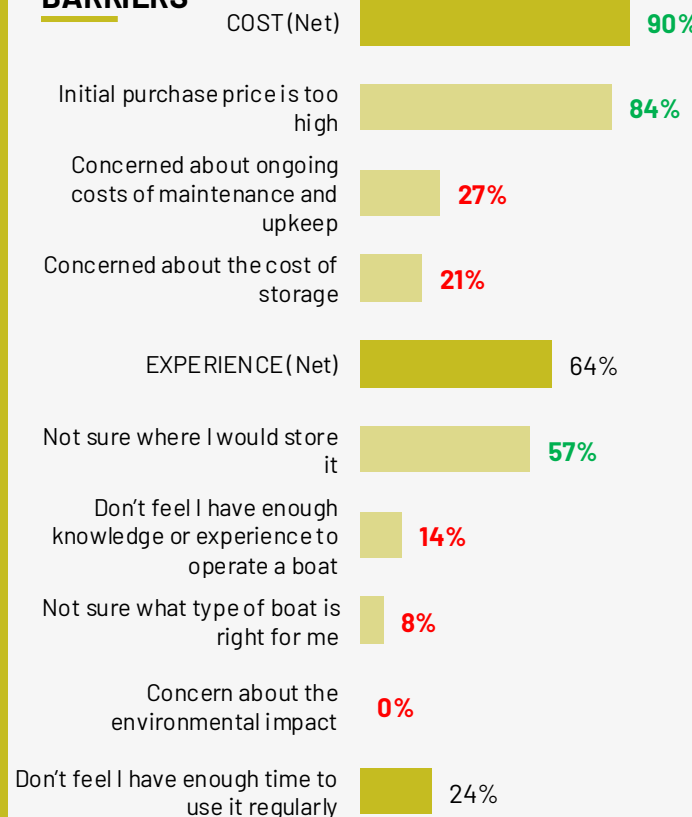
## ESTIMATED BOAT BUDGET



**\$ 48.3k**

Average Budget

## BARRIERS



# PRICED OUT

Cluster 3

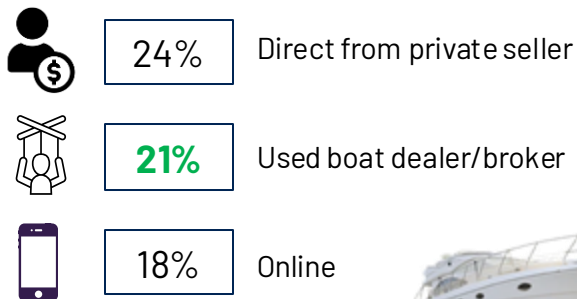


# PURCHASE JOURNEY

Priced Out Prospects are more interested in used boats than other prospects and have less interest in renting/joining boat clubs/fractional ownership programs. They are more price conscious and looking for transparency in pricing, wide range of price points with low-pressure sales.

## PLANNED PURCHASE

Top Mentions

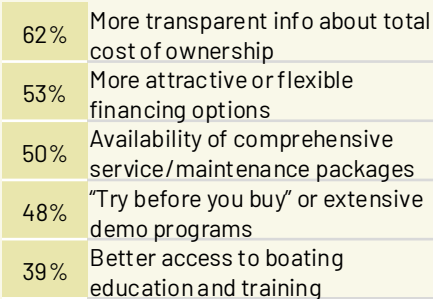


## INFLUENTIAL RESOURCES

Top Mentions

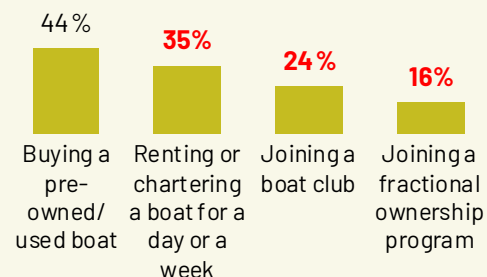


## ENCOURAGE PURCHASE



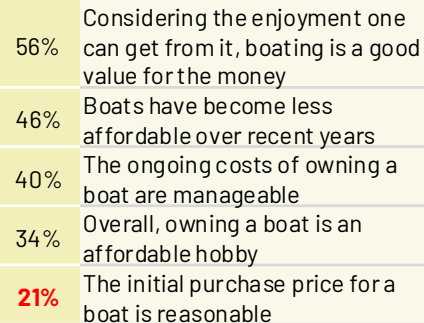
## INTEREST IN ALTERNATIVE MODELS

% Extremely/Very Interested



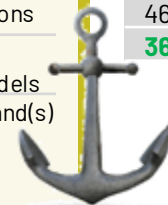
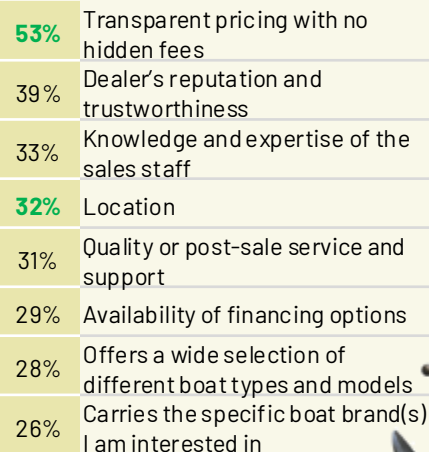
## AFFORDABILITY

% Strongly Agree/Agree

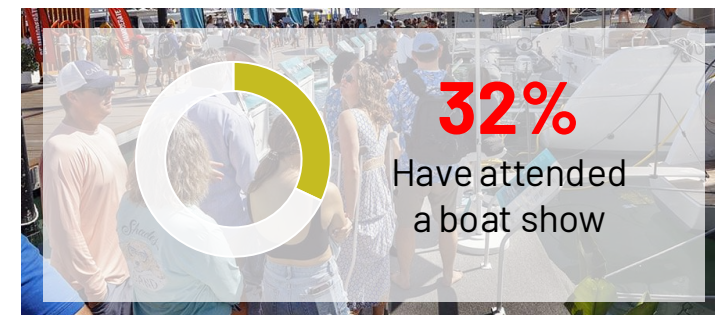


Never Attended Recreational Boat Show (n=68)

## DEALER FACTORS

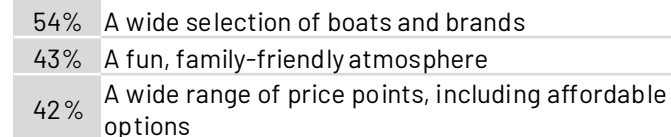


## ATTENDED BOAT SHOW

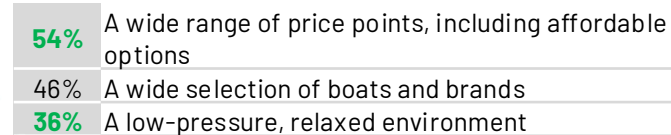


## PERCEPTIONS vs. WANTS

### TOP PERCEPTIONS



### TOP WANTS



C1, C3, C4, C5, C6, C6c, C7, C8

● Over Index to Total Prospects (≥120%)  
● Under Index to Total Prospects (≤ 80%)

Indexing reported if Total Prospects%=5%+

# PRICED OUT

Cluster 3



# THE WATER GENE

Around half of Price Out Prospects had frequent exposure to recreation boating growing up, with around a third having annual exposure through boats owned by friends or other family members, but significantly more of these prospects had no exposure through certain channels.

## UPBRINGING AND EXPOSURE TO WATER

% Strongly Agree/Agree

52%

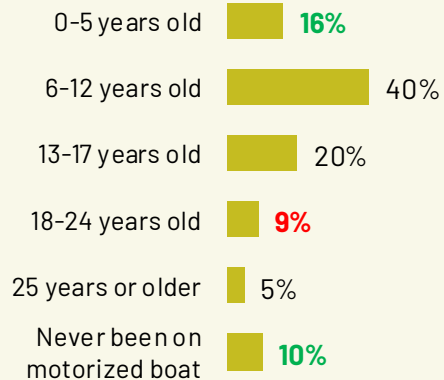
Growing up, I had frequent exposure to recreational boating

69%

Some of my best childhood memories involved being on or near the water

## AGE OF FIRST BOAT EXPERIENCE

12 Avg. Age



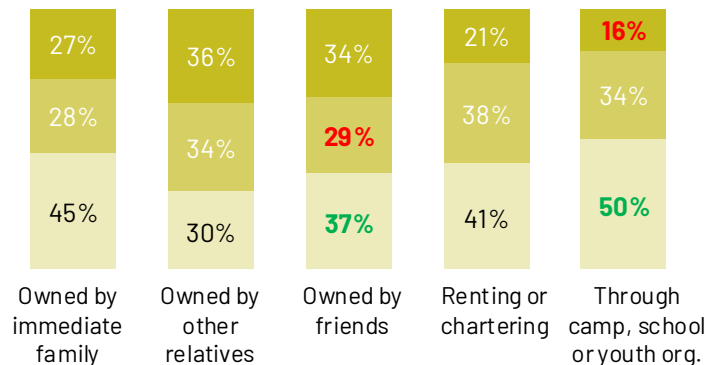
D1, D2, D3, D4, D5

Over Index to Total Prospects (≥120%)  
Under Index to Total Prospects (≤ 80%)

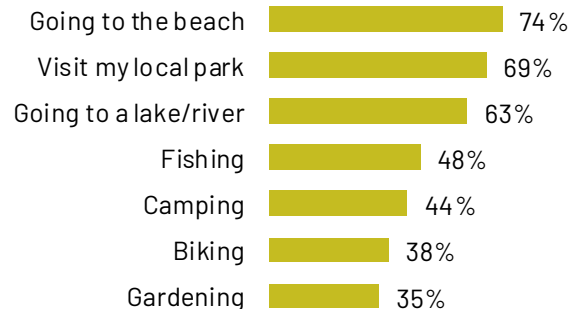
Indexing reported if Total Prospects %=5%+

## VOLUME OF EXPERIENCES

Annually Less Often Never



## OTHER OUTDOOR INTERESTS\*



\*Top Mentions of Have Participated as a Child and Now Percents Reported

## BOATING MEMORIES AND SENTIMENT

Mean Value



# PRICED OUT

Cluster 3



## PERSONAL MILESTONES & SOCIAL MEDIA

A third of Priced Out Prospects see owning a boat as something unattainable. They are less likely to be into powersports, luxury/classic cars or owning a second home and one a little over one third spend 5 to 10 hours a week on social media.

### LIFE MILESTONES AND IMPORTANCE

34%

Owning a boat is important but feels unattainable

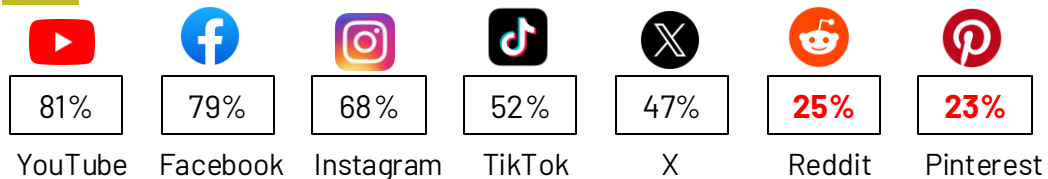
T2B% Important\*

Owning a car	78%	*
Getting married	60%	60%
Owning a home	57%	93%
Having children	51%	51%
Career advancement	49%	71%
Travelling to other countries	48%	65%
Having a traditional wedding	36%	44%
Retirement	12%	75%
Having grandchildren	8%	50%

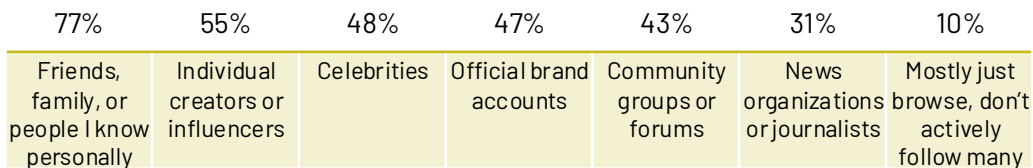
\*Base too low to report (n<30) ^Important and working toward it/ but feels unattainable  
HQ.E1, E2, E3a, E3, E4, MU16, MU17

● Over Index to Total Prospects (≥120%)  
● Under Index to Total Prospects (≤ 80%)  
Indexing reported if Total Prospects%=5%+

### SOCIAL MEDIA USAGE

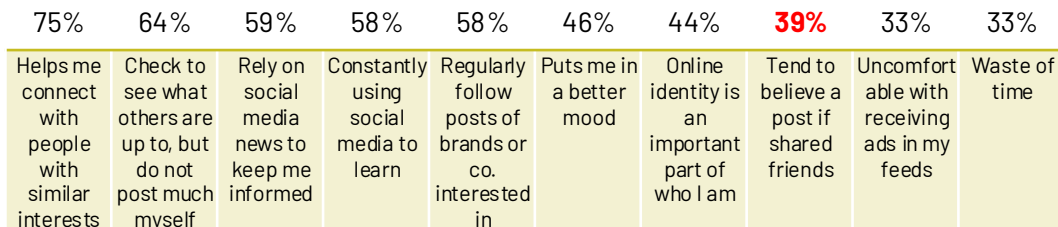


### ACCOUNTS FOLLOWED

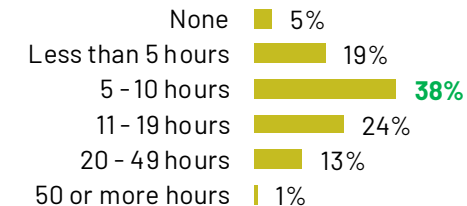


### SOCIAL MEDIA ATTITUDES

T2B% (Definitely/Tend to Agree)



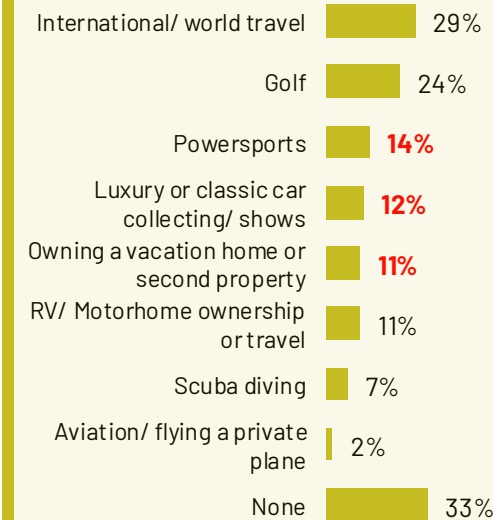
### SOCIAL MEDIA WEEKLY USAGE



12.0

Hours on average per week

### DISCRETIONARY ACTIVITIES



# PRICED OUT

Cluster 3

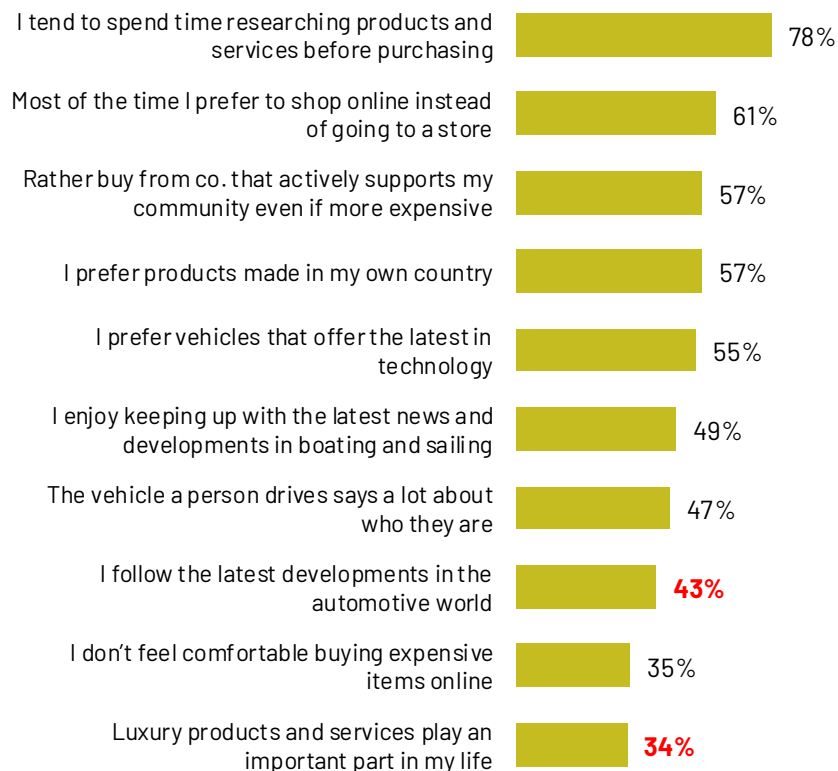


# ADDITIONAL ATTITUDINAL INSIGHTS & INTERESTS

Price Out Prospects over index in interest in gardening and attending charitable events. They are less likely to say that the economy is more important than the environment and are also **less optimistic** in their financial outlook.

## PERSONAL ATTITUDES

T2B% (Definitely/Tend to Agree)

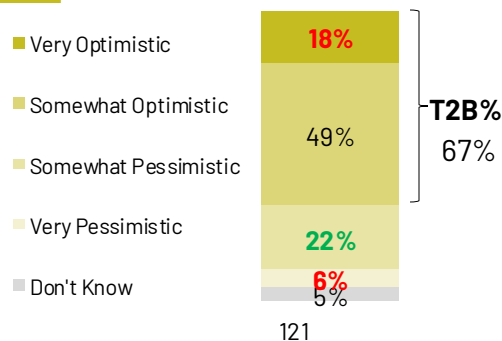


## ECONOMY & ENVIRONMENT

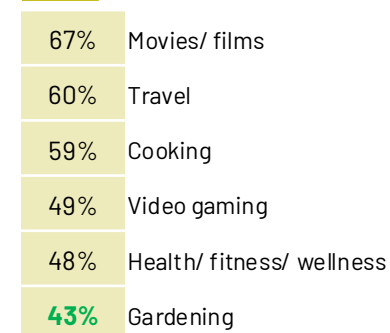
T2B% (Definitely/Tend to Agree)



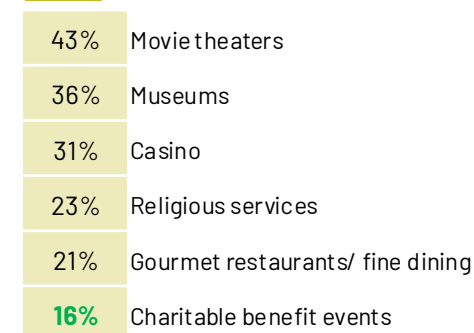
## OUTLOOK ON PERSONAL FINANCES



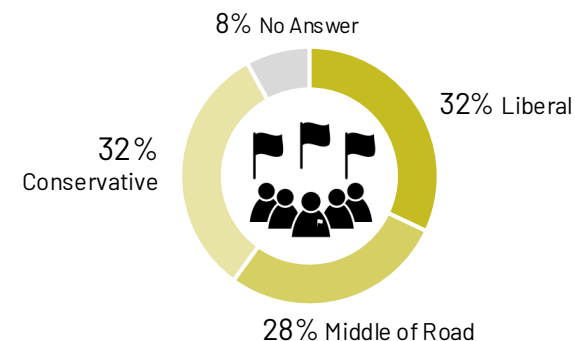
## TOP INTERESTS



## TOP EVENTS ATTENDED P12M



## POLITICAL AFFILIATION



FS1\_QAB1, GN1, F153, LL6, LL11, PA

● Over Index to Total Prospects (≥120%)  
● Under Index to Total Prospects (≤ 80%)

Indexing reported if Total Prospects %=5%+



ATTITUDES & BELIEFS

INTERESTS & EVENTS

# Thank You

**Stephanie Don**  
Vice President,  
Ipsos Market Strategy &  
Understanding

**Rachel Kelley**  
Sr. Account Manager,  
Ipsos Market Strategy &  
Understanding

**Jennifer Bender**  
Associate Partner,  
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**Andrew Ang**  
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Ipsos Strategy3

**Rachel Song**  
Consultant,  
Ipsos Strategy3

