

# TURNING INSIGHTS INTO DATA-DRIVEN MARKETING

April 2026



# 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

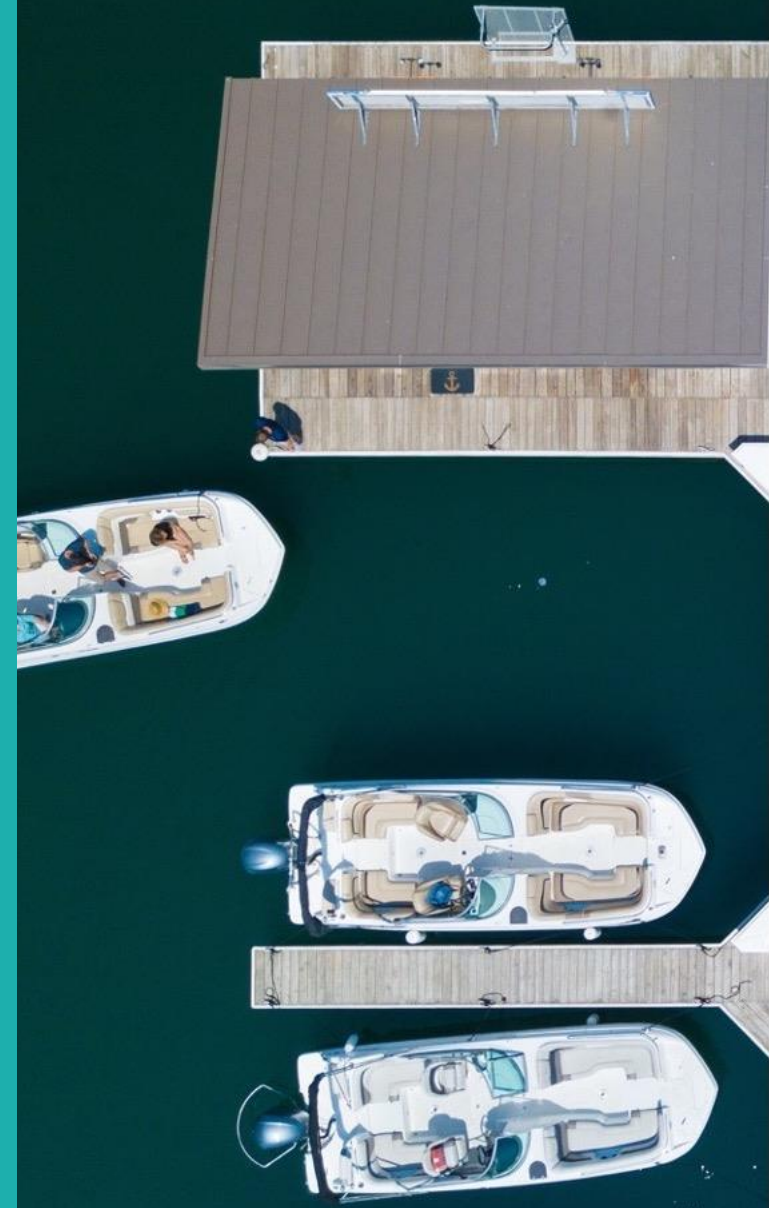
Uncover macro forces affecting today's consumer that will impact the boating category and broader operating context

#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



# Your Presenters



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



**Jennifer Bender**  
Partner, Head of Trends &  
Foresight  
Ipsos Strategy3

**We will have 15 min for questions at the end, so please feel free to drop them in the chat as we go!**

# Today's Agenda

1

## Executive Summary

2

## Today's Boating Landscape:

- Types of Targets: Current Owner & Prospective Owner
- Current Owner Overview
- Prospective Owners Overview + Detailed Profiles

3

## Tomorrow's Landscape:

- What's Changing in the World?
- Futureproofing: How Needs are Changing + How to Connect

5

## Q&A

# EXECUTIVE SUMMARY

Selection of key insights  
from the Handbook

# Methodology Note

All insights collected reflect opinions of our surveyed Boat Owners and Prospective Owners

## Methodology Details

- **WHEN:** Quantitative Survey Fielded August 22, 2025 through September 12, 2025
- **WHO:** N=500 Boat Owners, N= 500 Lapsed Owners, N=500 Prospective Owners
  - Consumers 18-75 years old, quotas set on age, gender and region to ensure representative sample
  - Boat Owners and Lapsed Owners defined as own (or used to own) and consider primary vessel a motorized/power boat or sailboat
  - Prospective Owners defined as **50% or more likely** to purchase a motorized/power boat or sailboat in the future and not a current or lapsed owner
  - *Base sizes allow for statistical significance testing at 95% confidence as well as advanced analytics*
- **WHAT:** 20-minute, device agnostic survey
  - Quantitative clustering on key questions among Prospective Buyers revealed 5 unique groups of buyers based on likelihood to buy, timeframe, barriers and level of knowledge

**This data is already being put into action!**

Alix Partners is leveraging these insights for more targeted marketing efforts – ensuring we are reaching the right people, with the right messages in the right places.

# Defining our Target Boaters

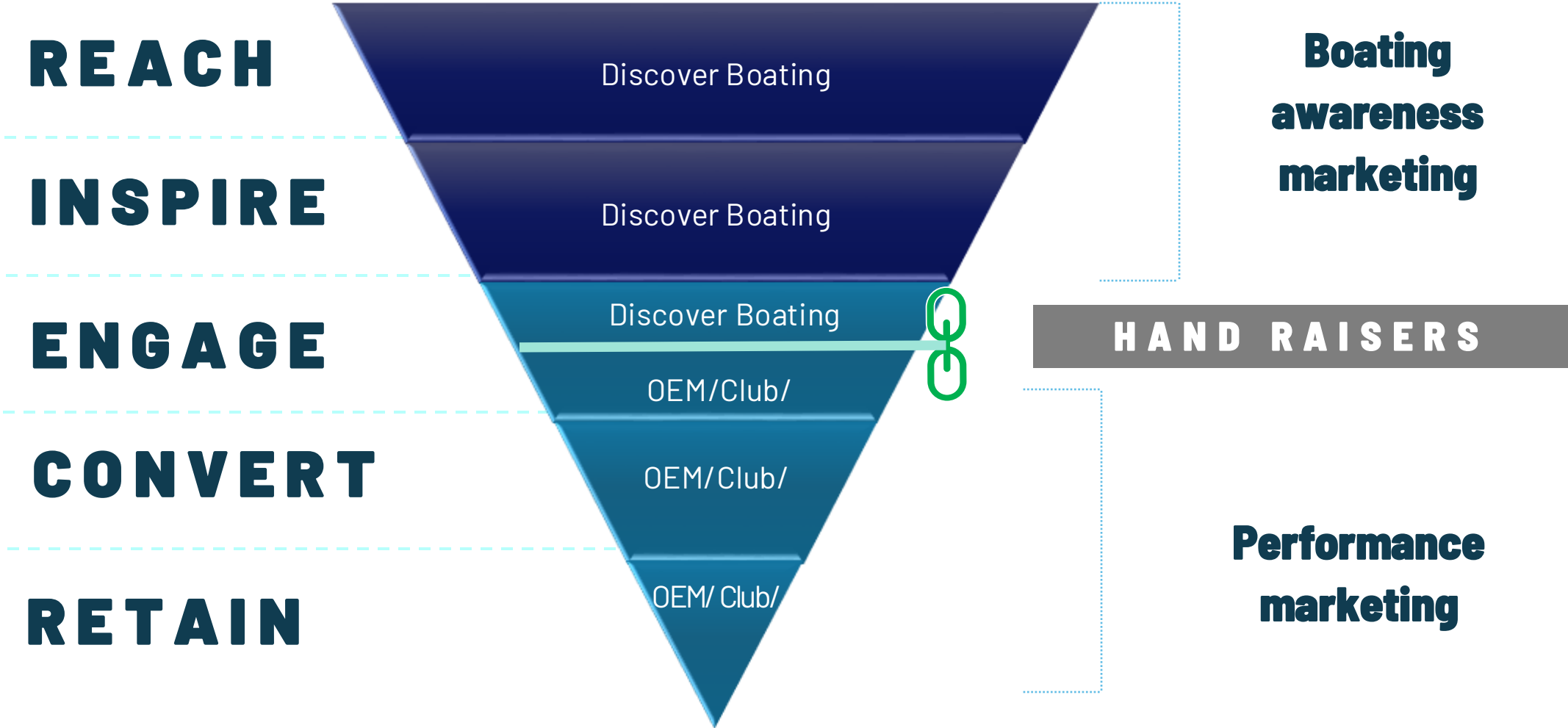
Through our research, we have **identified six groups of target customers** across Current and Prospective Owners.

These groups are **fundamentally different**: Each group has distinct needs, motivations, barriers that require tailored approaches to effectively engage them.

Understanding them helps us understand **where to play and how to win**, to grow the recreational boating category together across Discover Boating, Manufacturers and s.



# Discover Boating's primary purpose is to reach & inspire potential boaters

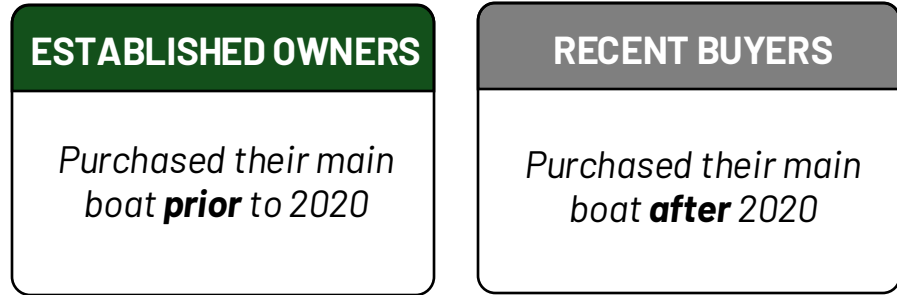


# Our Target Boaters



## CURRENT OWNERS

People who currently own at least one boat



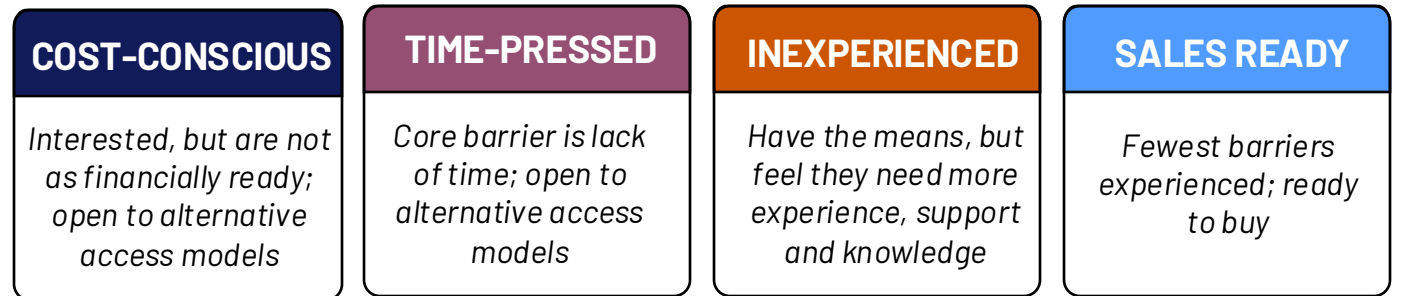
Focus for..



## PROSPECTIVE OWNERS

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

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



Focus for..



Focus for..



Focus for..



Focus for..



\*A fifth Prospective Owners cluster, *Priced Out*, is excluded due to it being a low-opportunity target

# 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, websites as main resources



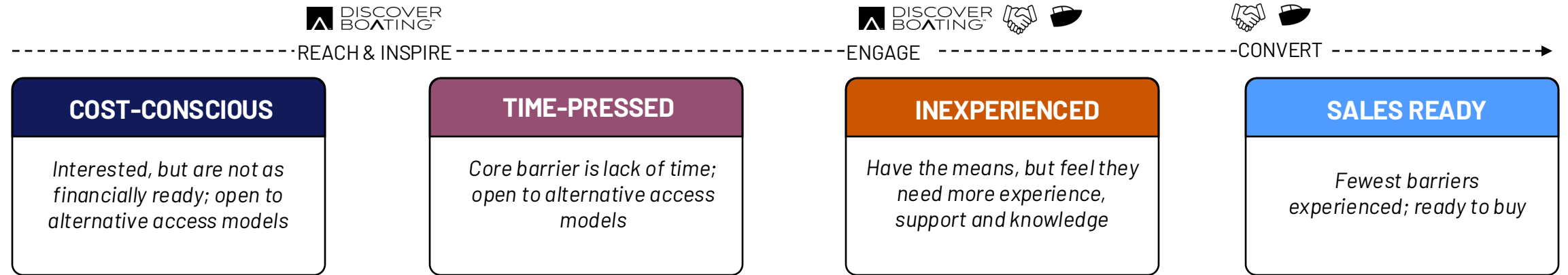
## PROSPECTIVE OWNERS

*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



Prospects who 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.

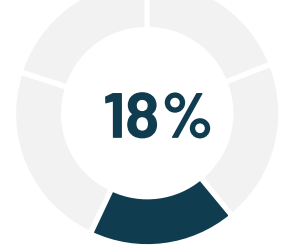
Prospects are **Millennials and Gen X**, majority **living in the South**. They **are less concerned about the cost or their experience with boating**, and **more concerned having enough time** to use the boat.

Prospects who are **close to a sales discussion** and 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**.

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.

Hand Raisers

# COST CONSCIOUS

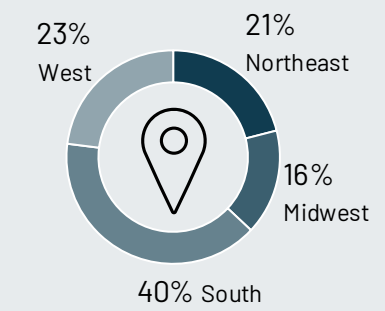
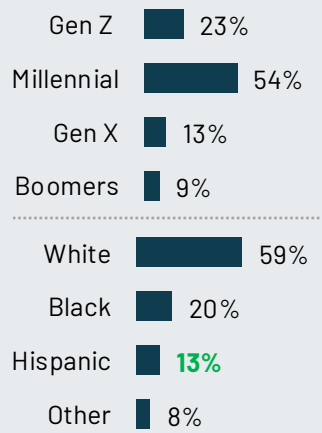
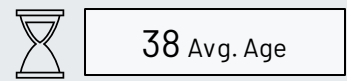


## KEY OVERVIEW

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

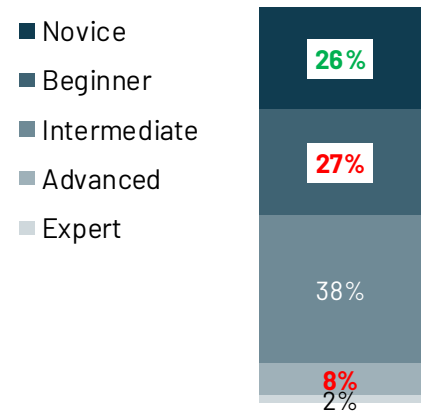
- 67%** Male
- 33%** Female
- 50%** Children in HH
- \$74.0k** Avg. Income



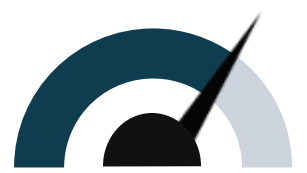
|     |                                     |
|-----|-------------------------------------|
| 24% | 100% necessities / 0% discretionary |
| 29% | 90% necessities / 10% discretionary |
| 39% | 75% necessities / 25% discretionary |

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

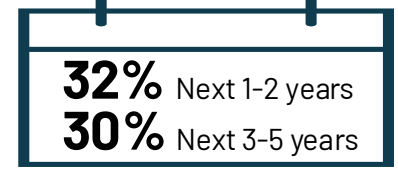


## LIKELIHOOD TO BUY BOAT



Likely to buy on average

## PURCHASE TIMEFRAME



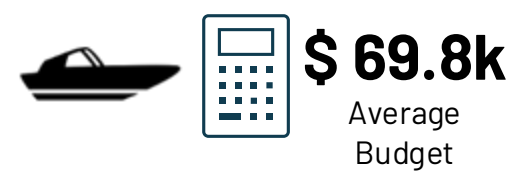
## TOP BOATS INTERESTED IN

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

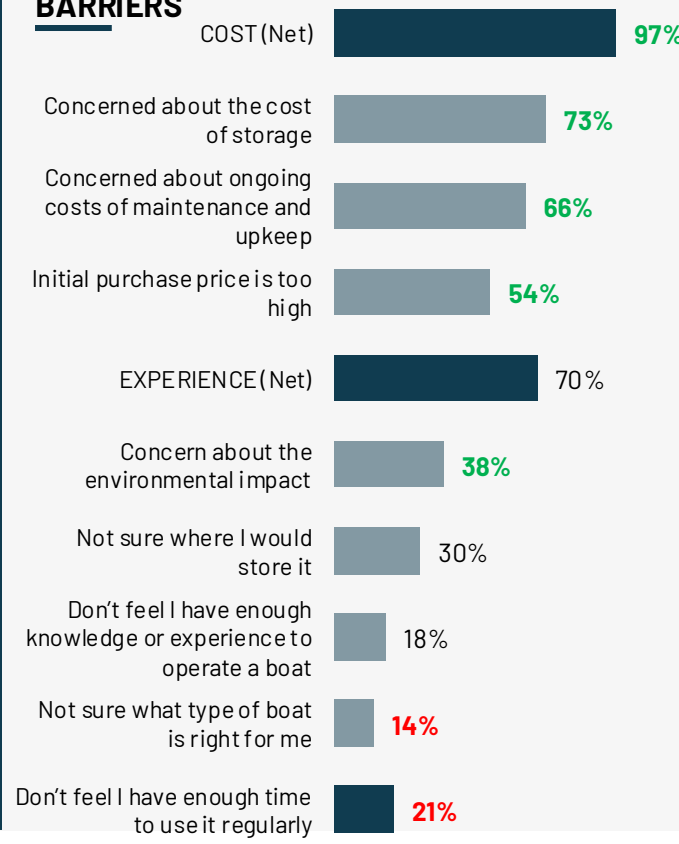
## 'DISCOVER BOATING'

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

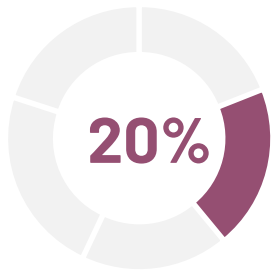
## ESTIMATED BOAT BUDGET



## BARRIERS



# TIME PRESSED

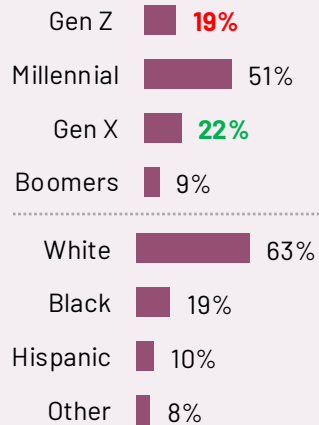
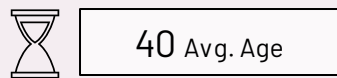


## KEY OVERVIEW

Time Pressed Prospects 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

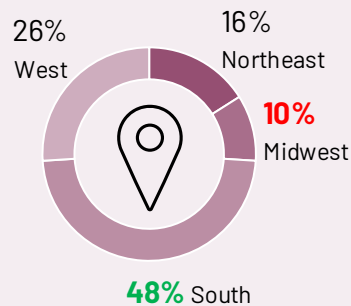
- 72%** Male
- 27%** Female
- 49%** Children in HH
- \$70.1k** Avg. Income



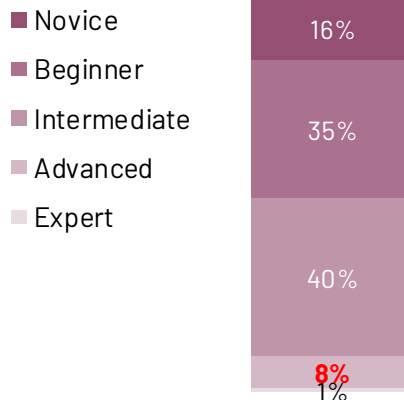
|     |                                     |
|-----|-------------------------------------|
| 21% | 90% necessities / 10% discretionary |
| 45% | 75% necessities / 25% discretionary |
| 23% | 50% necessities / 50% discretionary |

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

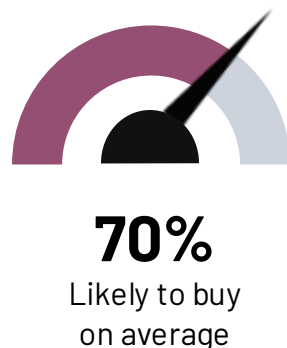
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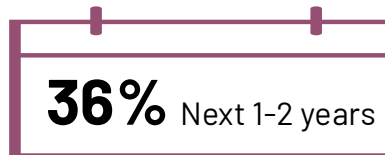
## KNOWLEDGE LEVEL



## LIKELIHOOD TO BUY BOAT



## PURCHASE TIMEFRAME



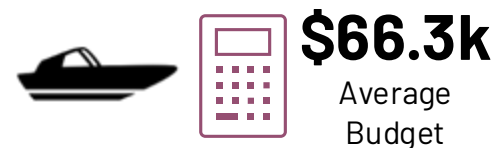
## TOP BOATS INTERESTED IN

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

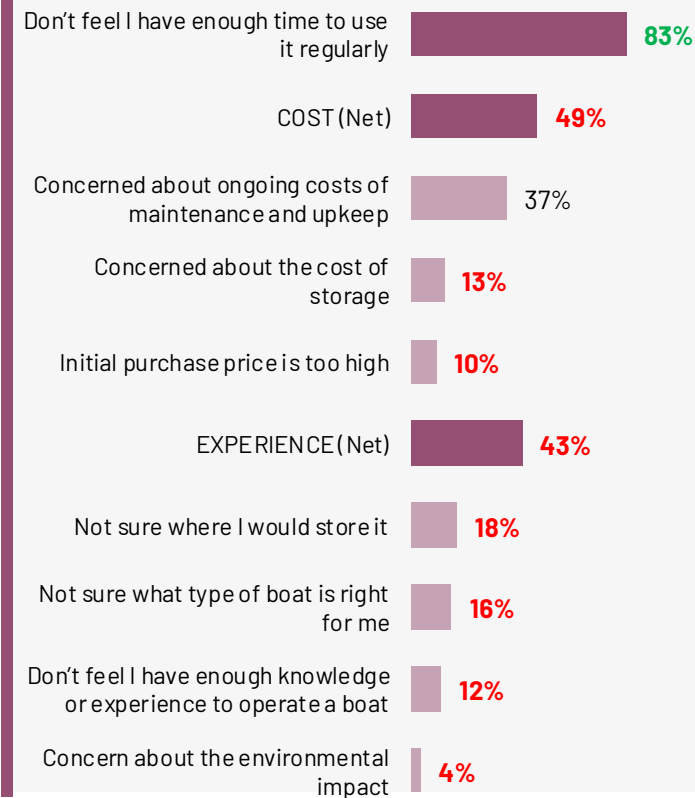
## 'DISCOVER BOATING'

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

## ESTIMATED BOAT BUDGET

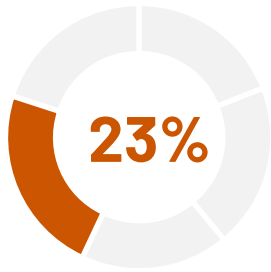


## BARRIERS



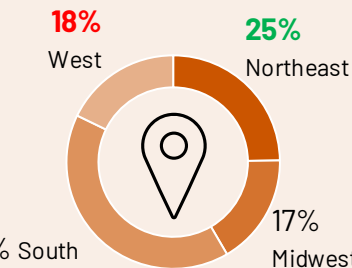
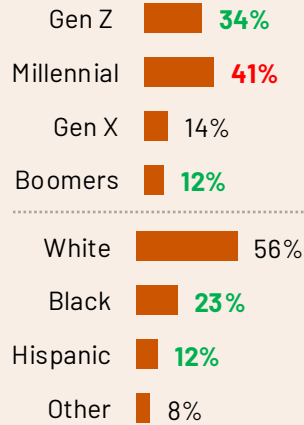
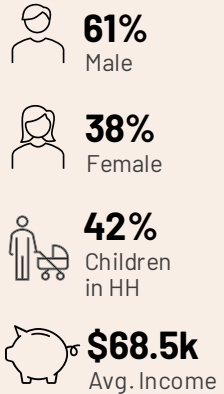
# INEXPERIENCED

## 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.

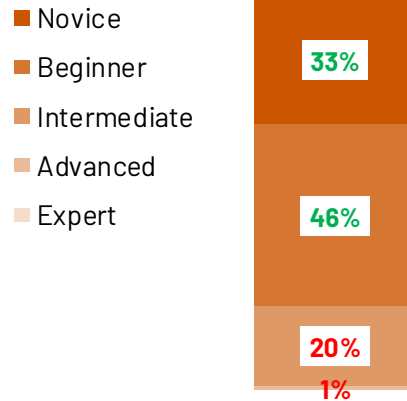
### KEY DEMOGRAPHICS



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

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### KNOWLEDGE LEVEL



### LIKELIHOOD TO BUY BOAT

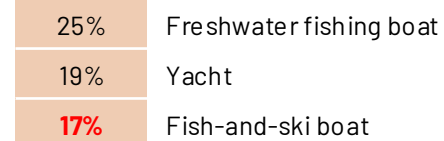


Likely to buy on average

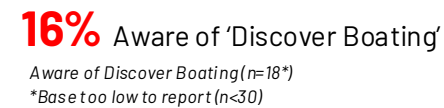
### PURCHASE TIMEFRAME



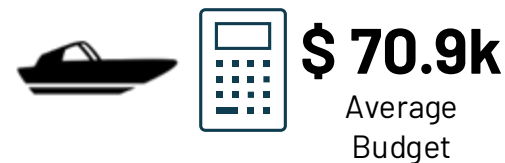
### TOP BOATS INTERESTED IN



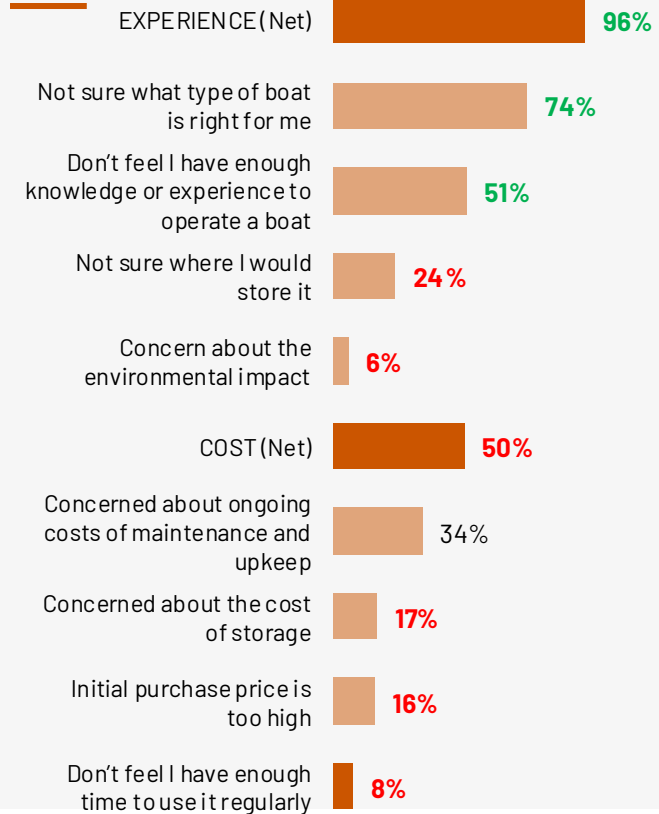
### 'DISCOVER BOATING'



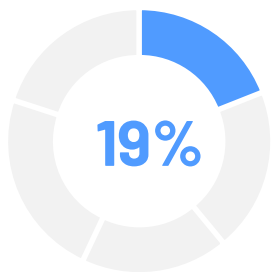
### ESTIMATED BOAT BUDGET



### BARRIERS



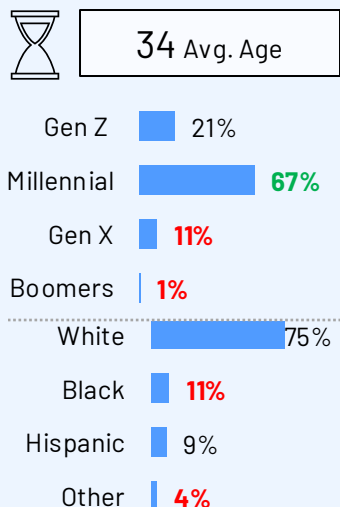
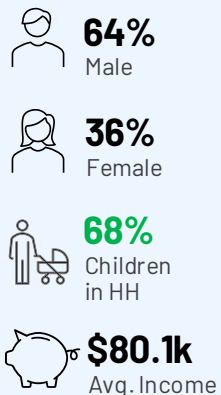
# SALES READY



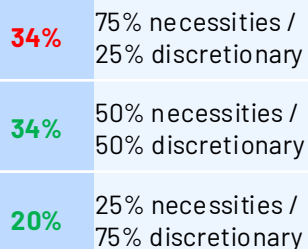
## KEY OVERVIEW

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

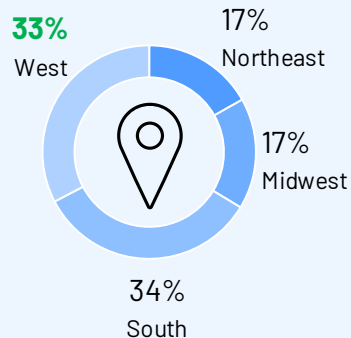


### Discretionary Income

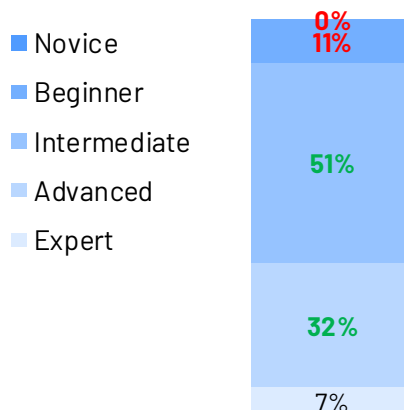


Miscellaneous Demographic Question, S1b, B3, HQS5, S5b, B1, B4, B2, C9, C9b

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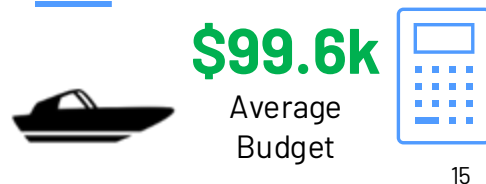
## KNOWLEDGE LEVEL



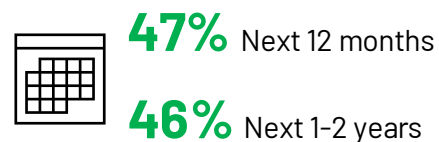
## LIKELIHOOD TO BUY BOAT



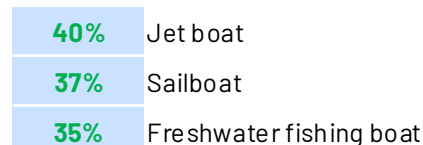
## ESTIMATED BOAT BUDGET



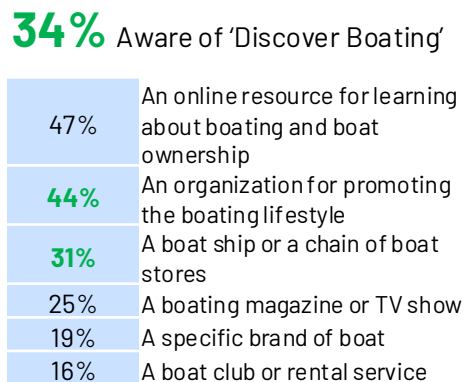
## PURCHASE TIMEFRAME



## TOP BOATS INTERESTED IN

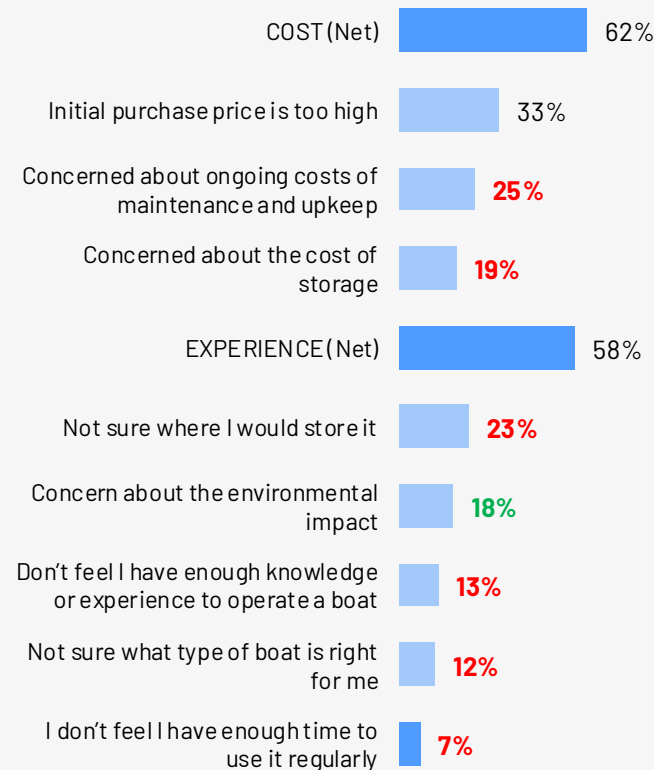


## 'DISCOVER BOATING'



Aware of Discover Boating (n=32)

## BARRIERS

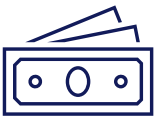




# The world has changed significantly in recent years, and will continue to shape the needs and expectations of consumers and our Target Boaters

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

01



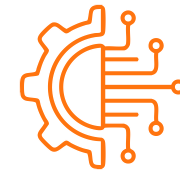
**Economic  
Uncertainties**

02



**Social  
Reconfiguration**

03



**Tech-Celeration**

# 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*

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



*What does this mean for 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](#)*

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

 What does this mean for 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*

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



*What does this mean for 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**.

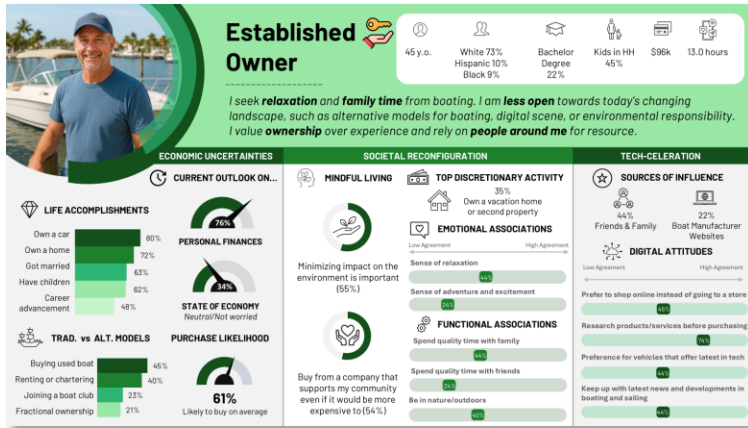
3

## Social Media as a Source of Influence

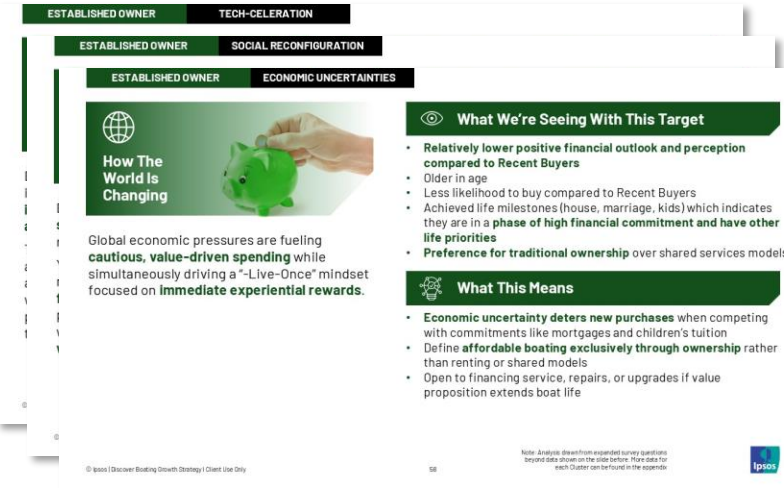
Social media has evolved into a primary channel where consumers go for product information, serving as a **key source of inspiration, education, and sales** for boating. It is now a platform where **authentic storytelling** can be strategically used to **connect the industry with the consumer base**.

# NMMA materials have implications for all 6 Current & Prospective Owner Groups

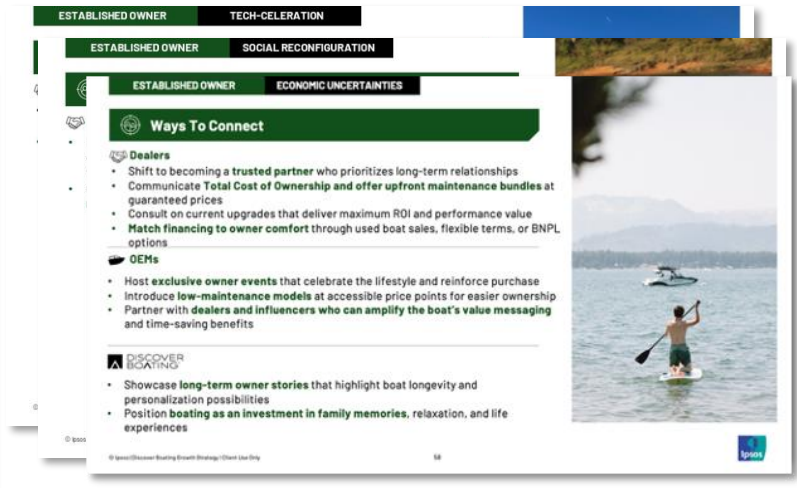
Each futureproofing profile features:



**Future 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, s, OEMs), what to do, and how to engage the target boater, for each Macro Force



## Key Insights Overall

- 1** **Exposure to water** and **experience** with boating-adjacent activities correlate with **boat ownership**.
- 2** **Today's prospective owners** are navigating **financial concerns**, embracing non-ownership **access models**, and moving through a **redefined purchase journey** shaped by new decision-making touchpoints.
- 3** **Current owners** skew **older, wealthier**, and more **educated**, with a more **optimistic view** of their personal finances and a strong reliance on **manufacturer and websites**, alongside online reviews, as trusted decision-making resources.
- 4** **Prospective owners** skew **younger** and more **price-constrained**, engaging with boats primarily through **charters and rentals** and relying more heavily on **friends, family**, YouTube, and **social media** for guidance.



# Overall Takeaways for Manufacturers

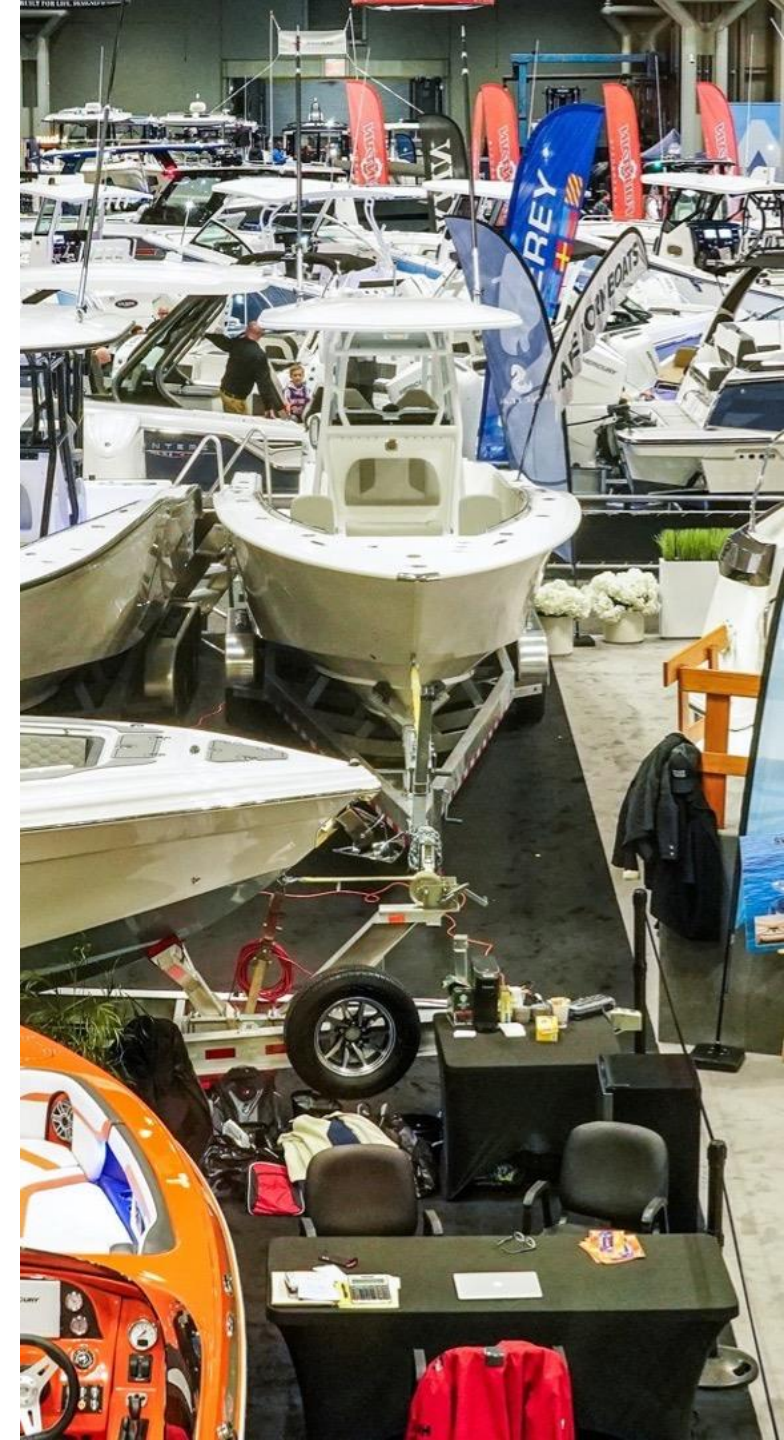
## Relevant Target Boaters

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

## 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 s 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.*

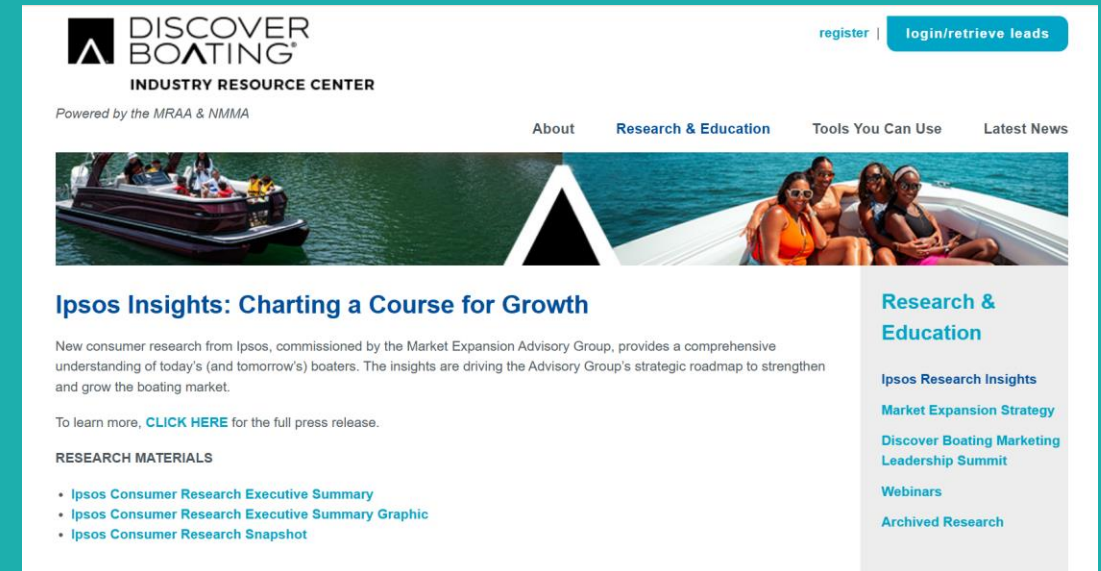


# What's Next: Handbooks

The handbook synthesizes our research 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 s to connect more effectively with boaters over the next 3 years.

We recommend that Manufacturers and s start with "Today's Boating Landscape" and proceed to explore the profiles, insights, and strategic recommendations relevant to their specific interests.



Materials are available for download at [b2b.discoverboating.com/ipsos-insights](https://b2b.discoverboating.com/ipsos-insights)

# Q&A



# Thank You

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**For access to the full  
report, scan the QR  
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the request.**

