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Sizing up the Boating Market

Discover Boating's research reveals six distinct groups that are potential boat buyers.

By Wanda Kenton-Smith June 24, 2026



Ipsos' research revealed that prospective boat owners represent 35 million people. IMAGE: MALIKA - STOCK.ADOBE.COM



I've covered the Grow Boating/Discover Boating outreach initiative since its launch in 2005. I remember the inaugural "Boating Wave" and "Spot the Dog" videos; a host of marketing ads, collateral and events; and much more. For a long while, Discover Boating seemed to bob on the water without much bite.

However, a strategic partnership in 2020 between the National Marine Manufacturers Association and the Marine Retailers Association of the Americas breathed new energy into the platform, which is designed to engage new boaters. Eventually, a new Discover Boating logo was revealed; the Miami International Boat Show was rebranded as the Discover Boating Miami International Boat Show in 2022; and by year's end, all of the NMMA's 13 U.S. boat shows were integrated to include the Discover Boating brand.

In addition, a "See You Out There" outreach campaign in 2022 included a refreshed mix of digital and social media channels. It powered a reported 145% increase in visitors ages 18 to 44 on the Discover Boating website, along with significant boosts in digital traffic among Gen Z, women and diverse audiences.



In July 2025, the NMMA and MRAA appointed a Market Expansion Advisory Group composed of OEM and retail marketers. The group was tasked with guiding and, ultimately, accelerating industry market growth. It has been hard at work, evidenced by a few notable early milestones such as the Discover Boating Health Score. It's designed to track key campaign indicators such as reach and market visibility, audience penetration, content, event engagement and boating participation.

The group's second effort was to commission consumer research for a clear understanding of current boat owners and future buyers. Global research firm Ipsos conducted the quantitative research of 1,500 current and lapsed boaters, recent buyers and prospective customers, along with qualitative research.

Ipsos identified six groups. Current owners include established buyers who purchased their main boat prior to 2020, and recent buyers who purchased after 2020. Prospective owners were described as time-pressed (those concerned about having sufficient time to use a boat); cost-conscious (motivated but budget-constrained); inexperienced (those who have means but need more experience, support and knowledge); and sales-ready (those with the fewest barriers and ready for a sales conversation).



"When comparing the profiles of established owners and recent buyers, there are

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critical shifts," says NMMA's vice president of North American marketing Kevin Williams. "Recent buyers in this survey skew more diverse and with a higher net income, more affluent than established owners, and are more likely to have entered boating through charters, rentals and adjacent outdoor activities. These buyers boat more frequently and are motivated by both relaxation and adventure, yet face barriers including time constraints, operator stress and weather unpredictability.

"Their path to purchase is increasingly digital-first and self-directed, shaped by YouTube, social media, creator influence, online reviews, and manufacturer and dealer websites," he adds. "However, trust still hinges on people. Dealers remain critical for credibility, transparent pricing and relationship-building. This means boat shows have an opportunity to evolve from transactional deal floors into experiential learning environments that build enthusiasm, education and long-term engagement."

Prospective owners, who self-identified as being at least 50% or more likely to purchase a boat, represent an estimated 35 million people, Williams says. Across this audience, Ipsos identified three realities that define the opportunity: cost barriers, complexity and an evolved purchase journey.



On the cost front, consumer confidence should benefit from improved pricing transparency, accessible financing and simple entry points, he says. To alleviate the idea that boating is complex or intimidating, Williams says, the industry can provide easily accessible, practical educational programs, more-structured onboarding and support throughout the ownership journey.

Dealers are a vital link in this chain. When I worked with Regal & Nautique of Orlando in Florida, the sales team handled preliminary onboarding delivery and offered qualified, outsourced support through Capt. Cathy Williams. Another company, Emerald Coast Marine in Niceville, Fla., hosted monthly on-site seminars with the local Coast Guard Auxiliary.

As for digital content starting to play more of a role in boat-purchasing decisions, the industry has a critical need to merge targeted content and platforms with valuable human touchpoints. Williams points to the Ipsos *Consumer Research Handbook*, which outlines specific roles for Discover Boating, OEMs and dealers, including practical applications to reach, engage and convert audience segments. In addition, he strongly recommends that marine marketers familiarize themselves with the data and check out the Discover Boating Resource Center, available by request at consumerinsights@discoverboating.com.



"The 'crawl phase' was launched this spring to test and validate our marketing tactics, audience-targeting and funding needs," he says. "As we confirm what works most effectively and efficiently, those efforts will continue to scale through additional testing, refinement and broader industry activation.

"The findings reinforce that growing boating is not the responsibility of one organization alone. It requires alignment and collaboration across the marketing funnel," he adds. "Discover Boating plays an important role in building awareness and inspiring interest at the top of the funnel, while manufacturers and dealers help guide consumers through engagement, conversion and ownership. When those efforts work together, the industry is in a much stronger position to reach the right people, connect with them in more meaningful ways and, ultimately, convert more interested consumers into lifelong boaters."

Marketers play a key role in helping the industry apply these insights, Williams says. "One of the biggest takeaways from the research is that today's boating consumer is not a one-size-fits-all audience. Different consumer segments have different motivations, barriers, lifestyles and pathways into boating, which means marketing strategies need to become more targeted and personalized."

Specifically, Williams suggests that marine marketers translate the research into practical applications in their area of focus, from refining audience targeting and messaging strategies to creating content that better reflects how people want to experience boating today.

"That includes leveraging short-form video, creator and influencer partnerships, educational content, owner stories and lifestyle-driven storytelling that positions boating as accessible, restorative, family-friendly and experience-driven," he says. "Marketers can also help simplify the path into boating by improving digital experiences and making information easier to navigate."

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