



The State of the Consumer

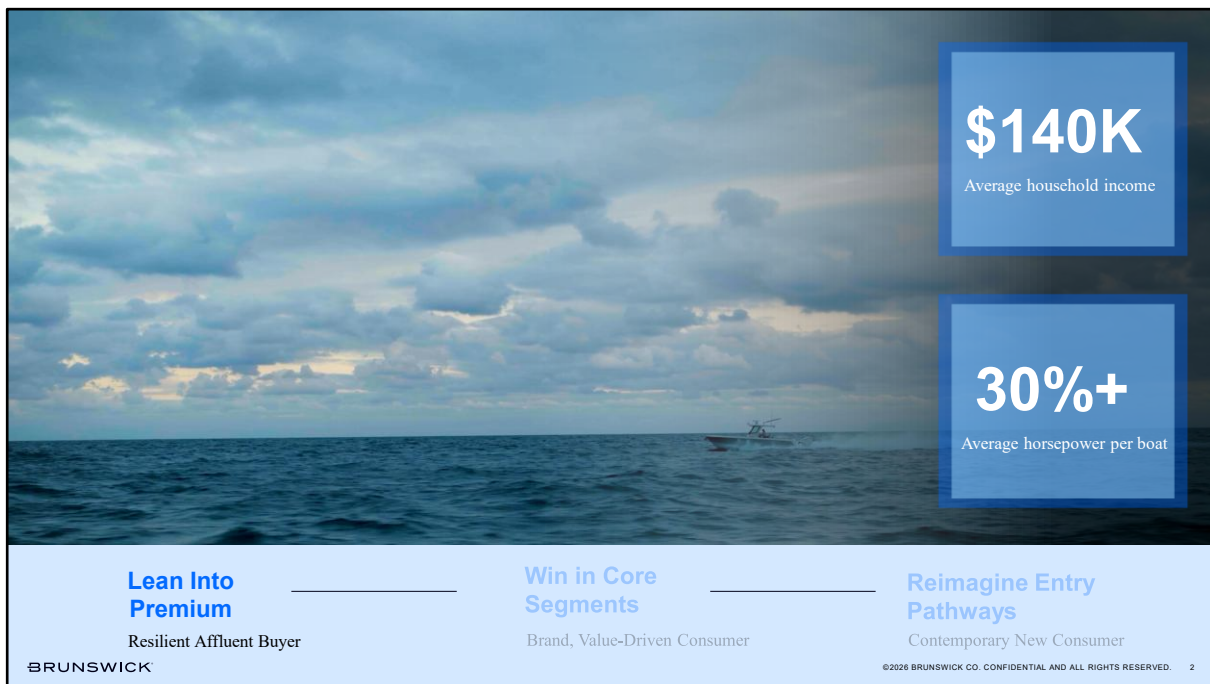


Lauren Beckstedt
Chief Marketing Officer

BRUNSWICK

Consumers have experienced nearly five years of macro and geopolitical volatility, and here's what we're seeing — it has influenced how consumers engage, but not whether they participate.

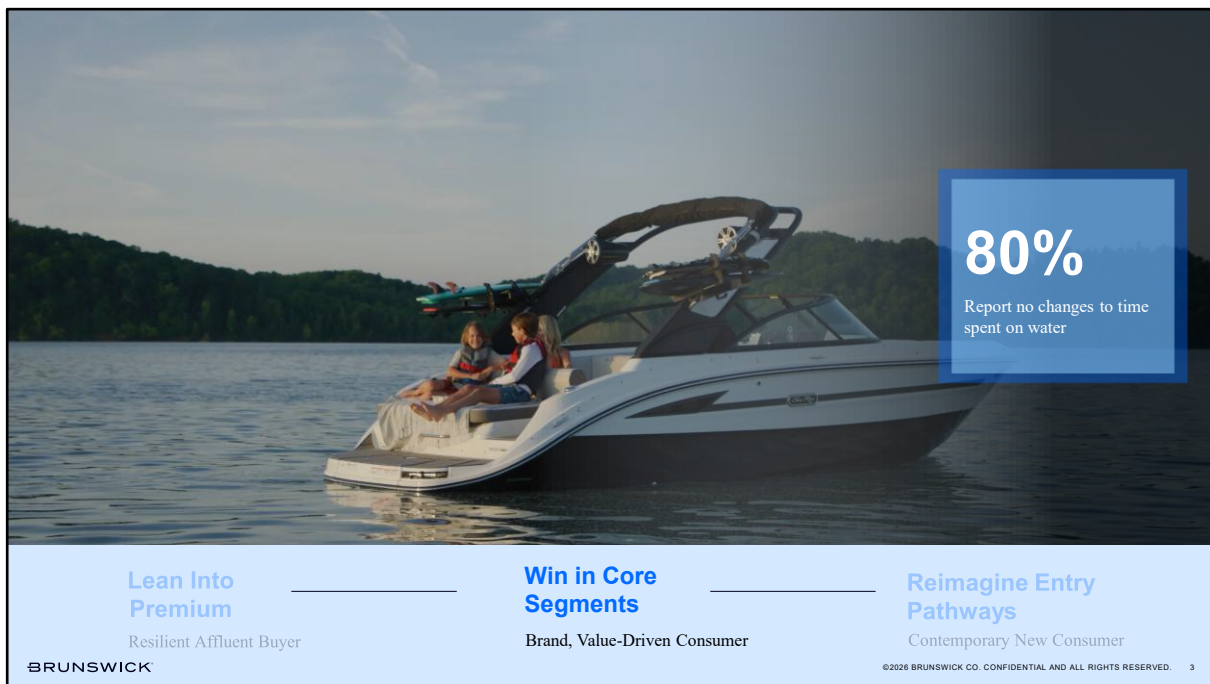
In an increasingly digital world with rapidly accelerating change, consumer participation is remarkably strong in this uniquely physical experience of boating.



When we look at the modern marine consumer, we see a marketplace defined not by a single macro trend, but by distinct, evolving consumer mindsets. Our portfolio breadth allows us to meet these buyers exactly where their priorities are shifting.

The Brunswick consumer maintains an average household income of \$140 thousand. While not insulated from economic turbulence, their discretionary spending is increasingly shifting towards high-value experiences. The affluent buyer remains focused on advanced technology and top-of-the-line options and that is exactly where the majority of our portfolio is positioned to serve.

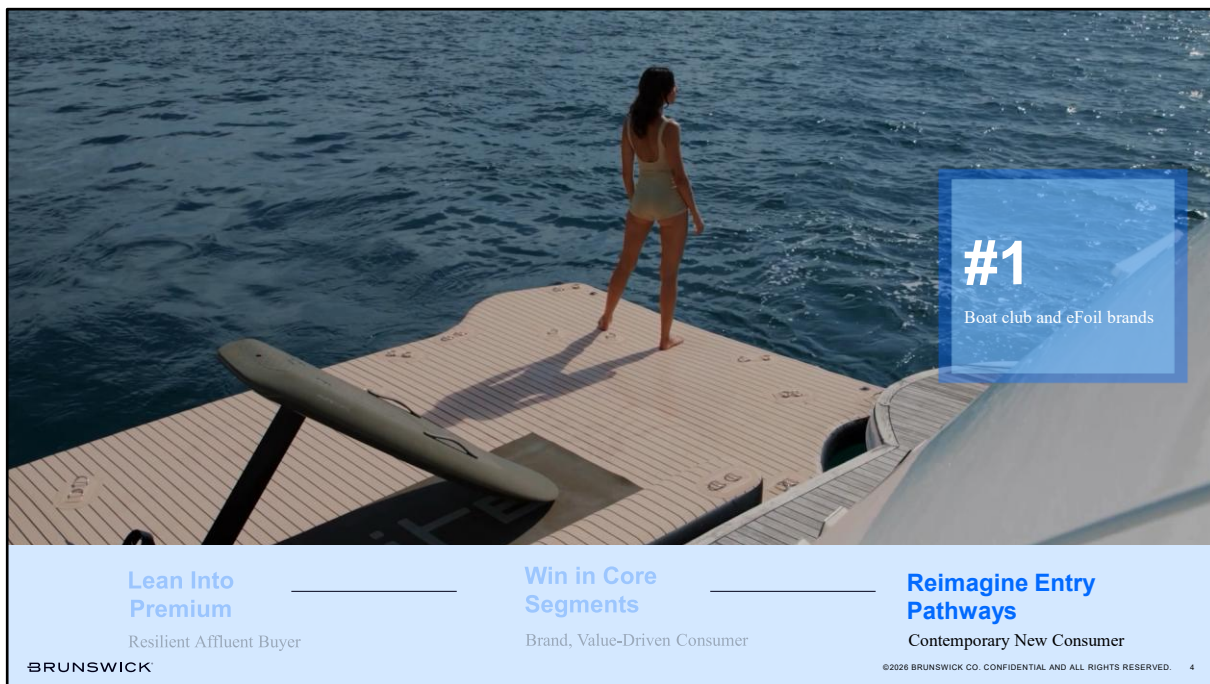
In fact, the standard for premium performance itself has shifted: over the last five years, the average horsepower per boat increased by nearly 30%. The consumer isn't just looking for a product, they are demanding a highly advanced, and seamless experience and only Brunswick can answer the call with a steady stream of pioneering technologies that make boating more approachable and easier than ever.



We also see proven resilience within our core and value segment buyers, though how these consumers define value is changing.

Data from Brunswick's Consumer Pulse, an always-on boater sentiment survey, highlights a deep lifestyle commitment: more than 80 percent of boaters surveyed report no plans to change their time on the water. However, their purchasing behavior is evolving. For this consumer, value means versatility.

These buyers are gravitating toward multi-use, hybrid products like the Sea Ray SDX Surf Series and our new Navan brand — maximizing their investment by opting for a single, quality vessel that supports a multi-activity lifestyle.



Finally, we continue to expand our addressable market by reimagining entry pathways to on-water recreation.

As home to the number one global boat club franchise, Freedom Boat Club, and the definitive leader in the eFoil category — Fliteboard, Brunswick offers new ways to experience life on the water at lower price points or through alternative payment models.

INVESTOR DAY 2026



90%+

Club Member Retention & Boater
Reported Intent to Stay



135M+

Global Consumer Participation in
Recreational Marine



2X

Ripl Consumer Advisory
Community Growth



58M+

Record High Anglers
in the U.S.



BRUNSWICK® Brunswick Consumer Pulse; Internal Brunswick Data; NIMMA & UED Boater Participation; RIBFF Special Report On Fishing

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Participation across all segments remains strong, as people continue to find ways to unplug and reconnect with reality.

Every year, more than 135 million people go boating worldwide. And, just in the U.S., more than 58 million people fish both on and off boat — a record high.

Boat club memberships continue to grow — with 63 thousand Freedom Boat Club members across 450 global locations. And trips are up more than 12% year to date.

Our Ripl Boater Community also continues to thrive growing by more than double since 2024, with more than 25 thousand members.

Getting out on the water today often translates into a lifetime passion for boating — with the vast majority of current boaters, 93 percent, telling us that they are committed to boating for the long-term.



Female boat ownership reaches

**HISTORIC
HIGH**

GROWTH

Among African American and
Hispanic communities

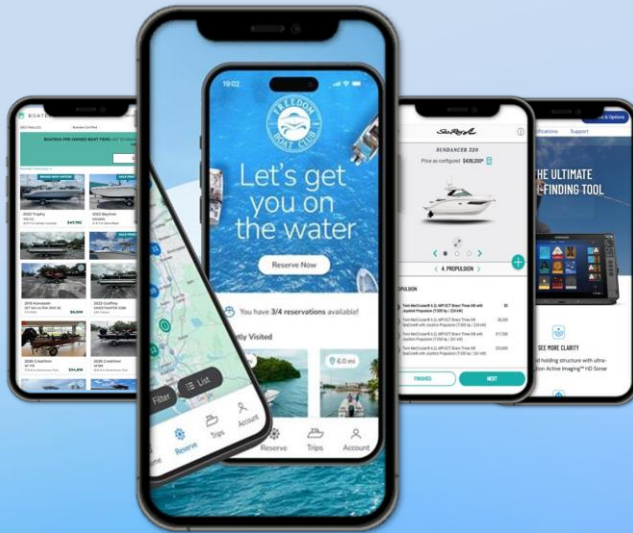
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NAMMA 1997'S Boat Study: RIFF Special Report On Fishing: Info-Link Data June 2026

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Because the marine lifestyle has such strong staying power, boating attracts a more diverse community every day. Women now represent more than one-third of anglers and one-fifth of boat buyers — both historic highs. And in the last 5 years, Hispanic and African American representation has increased by more than 55 percent.

Unrivaled Access To The Consumer



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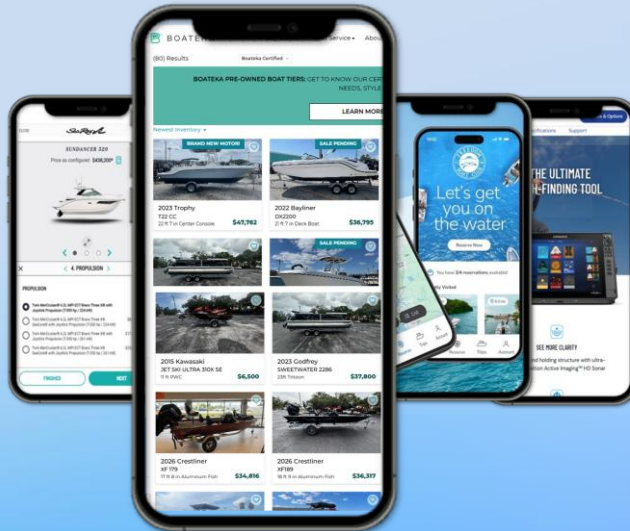
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Membership

Flexible boat options; global reciprocity

We aren't just welcoming the new consumer to the water, we are translating our expanded reach into long-term, incremental revenue. With our portfolio breadth, we engage one of every two boat owners and maintain the largest boat club membership base in the industry, earning Brunswick the widest consumer reach in recreational marine.

Unrivalled Access To The Consumer



Preowned

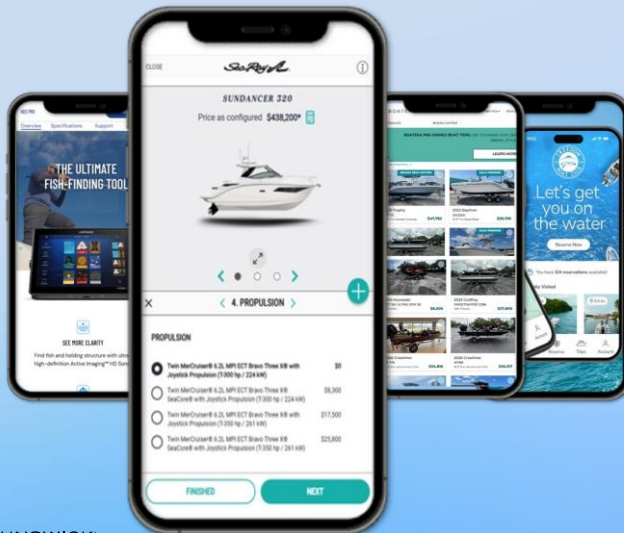
Certified product at entry price points

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Our unique consumer access and advanced digital ecosystem allows us to guide boaters through our portfolio along a personalized path.

Unrivalled Access To The Consumer

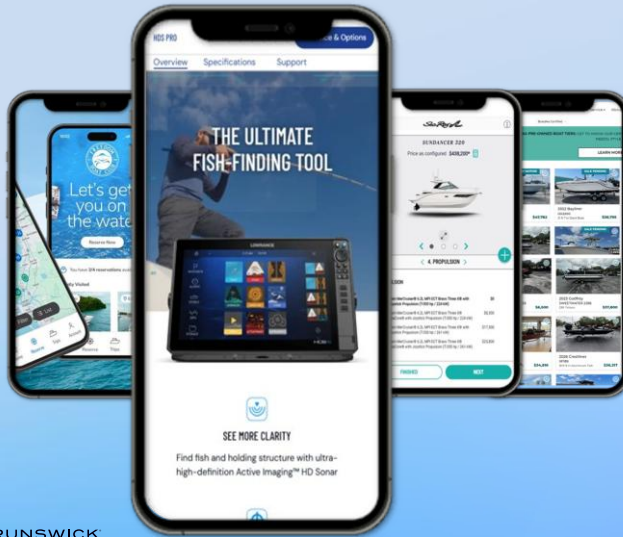


New

Industry's top brands; premium innovation

By matching their lifestyle needs — whether through membership, a new or pre-owned boat purchase, or a technology upgrade — we maximize the consumer's long-term satisfaction and their lifetime value to Brunswick.

Unrivaled Access To The Consumer



Upgrade

Enhancements that upgrade or extend existing products

In fact, more than 36 percent of our revenue can be attributed to our consumer marketing, with some brands, like Lund and Freedom Boat Club, boasting a much higher percentage of marketing-attributable sales.



By shifting value creation beyond the point of sale towards lifetime engagement, Brunswick can serve the boater across various lifestyles and life stages.

More than 60 percent of consumers surveyed identify smart technology and connectivity upgrades as the primary driver of ongoing category spending. Spending on parts and accessories is also up by more than 15 percent year-over-year, a credit to Mercury's global distribution and broad assortment.

Brands like C-MAP navigation charts grew subscription revenue by 25 percent in the past year, and financial services products, like certified pre-owned offerings, competitive financing and extended warranties, enhance versatility and affordability for the consumer, while reinforcing our ability to retain and support a captive audience.

The strength of our brands fuels a lifestyle, frequently becoming a symbol of the individual themselves. Affinity for Brunswick brands is so strong that we've also expanded our brand collaborations, launching eight new collections — selling out limited edition drops with Tombolo, Salty Crew, Marsh Wear and in-market now with Abercrombie & Fitch.

At Brunswick, we aren't just winning with a changing consumer landscape — we are actively shaping it. By meeting boaters exactly where their lifestyles evolve, Brunswick has built a community that stays with us for life, unlocking predictable, compounding value across our entire ecosystem.

And now we'll hear from John Buelow, President of Mercury Marine.