



PATHS TO PARTICIPATION

*How to help hunters and target shooters try
new shooting sports activities.*



Overview

The purpose of this project is to help improve hunting and shooting sports marketing efforts by describing how current hunters and shooters can be encouraged to try other shooting activities. To achieve this, a custom survey was fielded through NSSF partner organizations from June 2017 to August 2017. Qualified survey respondents were those who participated in hunting or recreational shooting at least once within the past three years. Qualified respondents were then asked questions about their introduction and evolution through various hunting and shooting activities. Previous and current activities, as well as activities they would be interested in trying, were all evaluated. All individuals in this analysis were at least moderately interested in the addressed activity, as determined by a survey question.

The sample for this study included individuals recruited by NSSF partner organizations. The results are not representative of the population of hunters and shooters, but rather the constituency of NSSF's partner organizations. The results are not meant to be representative of all hunters and shooters, but instead were designed to support hunter and shooter *retention* efforts by explaining interest levels in new shooting sports activities and how to best help current hunters and shooters try new activities.

As a result, these results do not focus on how to recruit new, first time participants to the hunting and shooting sports, but instead focus on how to encourage our current customers to try new activities.

Introduction

As is normal, people frequently take on new recreational activities and drop others. As the shooting sports industry, the concern is our customers might drop shooting sports completely. The purpose of this study was to identify opportunities and tactics to encourage current customers to try new forms of hunting and shooting activities.

Hunters generally want to try new hunting activities that are not readily available in their home region. For example, the biggest interest for pig hunting comes from the Midwest while the greatest interest in elk and waterfowl hunting is in the South. While this makes sense, given the costs associated with travel, interest still exists in hunting different species or trying new methods close to home. For target shooting, there is little difference across the regions. Overall, the greatest interest in trying new shooting activities lies within the South and the Midwest. The many types of hunting and shooting activities available to promote are presented within this report.

There are a few hunting and shooting activities where the majority want to try it for the first time, such as target shooting with a crossbow or pig hunting. Accessibility, time and knowing how to get started are some of the most common hurdles we need to help our customers overcome. For those that want to hunt, it's difficult to find convenient and affordable lands, while target shooters often have trouble finding a local range offering the activities they are interested in trying. Both shooters and hunters hesitate in buying equipment needed for new activities before they try the sport. These and other issues are also outlined within this report.

This report presents a wealth of information. Recognizing most hunting and shooting sports programs and organizations focus on specific types of activities, after some brief overall insights, details are presented for specific types of hunting and shooting sports.

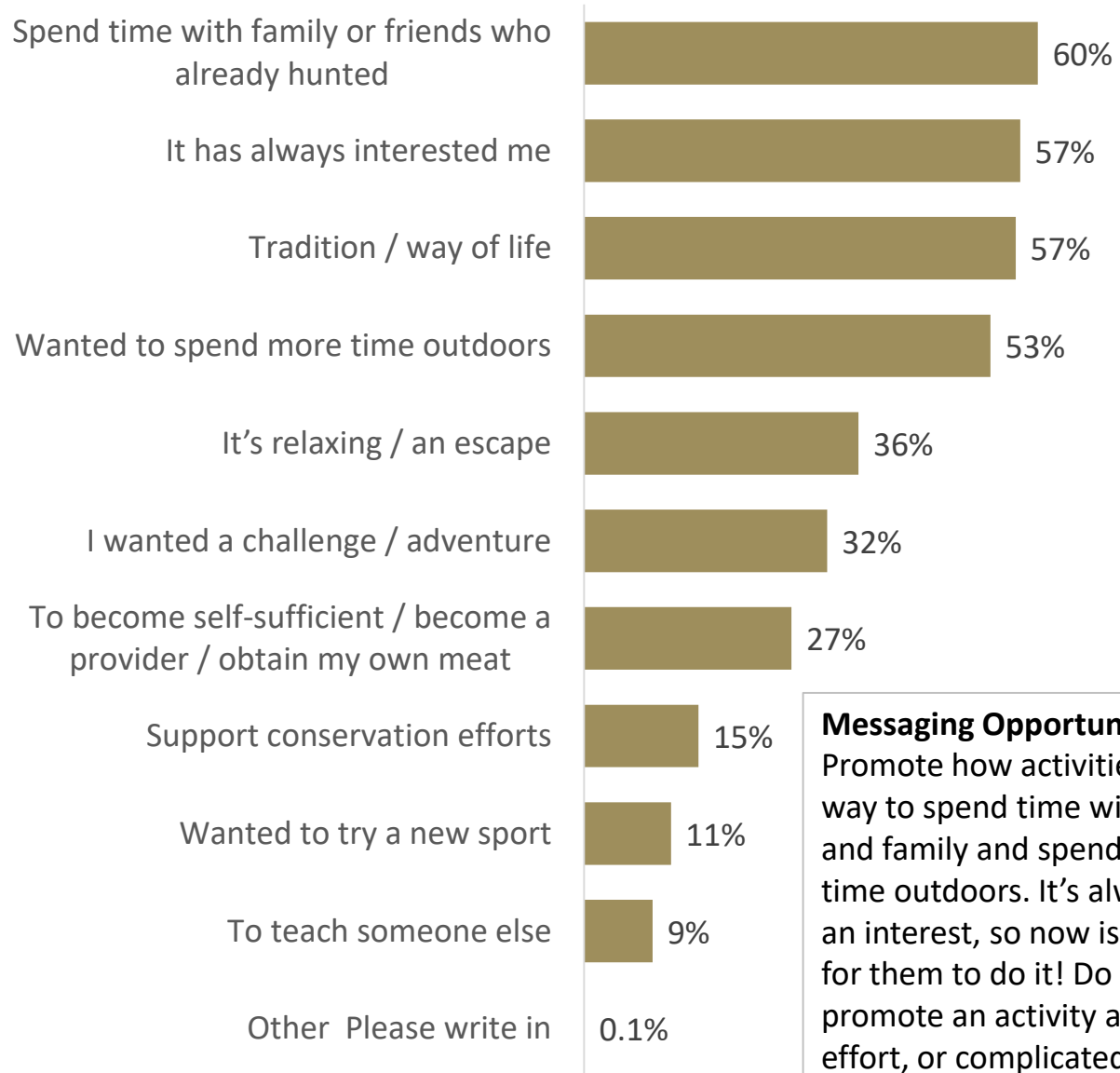
Introduction

Key takeaways regarding how to help hunters and target shooters try new activities:

- **Create easy access** – Create mobile apps and online tools to help them find places to hunt or local shooting ranges, make reservations, rent equipment, etc. In addition, create beginner apps or voice-activated assistants, like Google Assistant or Amazon's Alexa that answer questions, such as what to do with their harvest, where to rent equipment, how to aim and shoot, as well as advanced level apps on perfecting their skills. Provide equipment rentals, hunting guides and group shooting / hunting events or programs that allow them to try the sport.
- **Be simplistic / convenient** – Promote how it can fit in their busy schedules, such as “way to spend time with family,” and “spend more time outdoors” and offer more close-to-home experiences. The easier an activity appears, the more simple and convenient it becomes.
- **Influence through their friends and peers** – Hunting and shooting are social activities. Very few will participate if they do not see their friends or others like themselves participating. Leverage non-professionals' hunting and shooting videos, photos and stories through social media platforms (Instagram, Facebook, YouTube), blogs, magazines and share through television programs. Encourage friends to connect at the field or at the range.
- **Promote unique experiences** – Collaborate with cross-industry retailers, organizations and manufacturers to create events or experiences that current customers will want to make time for.
- **Educate through augmented reality / video** – To give a lasting impression on what it's like to experience new hunting and shooting activities, simulate the experience at outdoor retailers, state fairs or other outdoor events where current customers gather, or showcase professionals hunting or shooting via online video on YouTube.

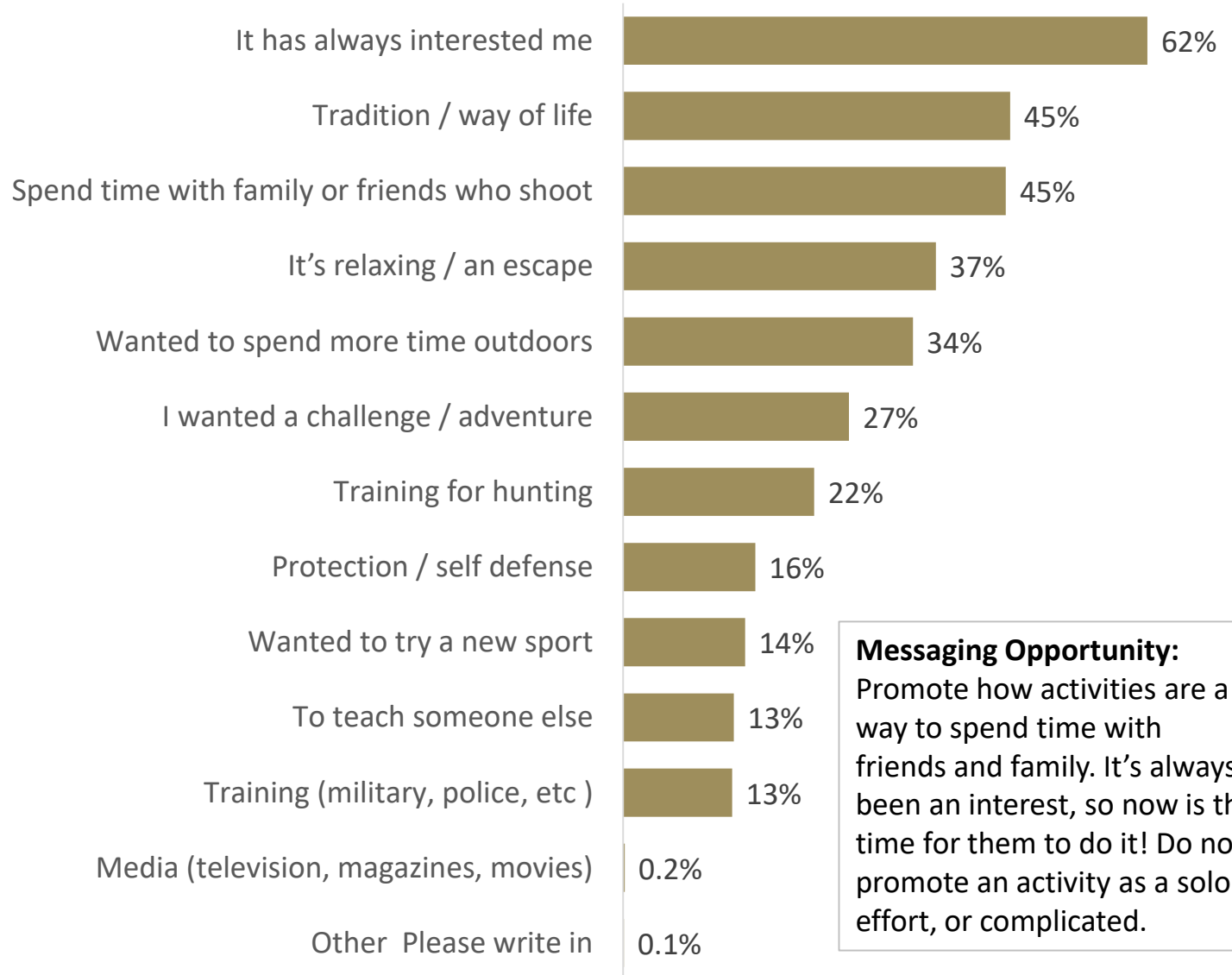
Thank you for your interest in helping advance hunting and shooting sports.

MOTIVATIONS TO START HUNTING (any type of species)



Messaging Opportunity:
Promote how activities are a way to spend time with friends and family and spend more time outdoors. It's always been an interest, so now is the time for them to do it! Do not promote an activity as a solo effort, or complicated.

MOTIVATIONS TO START TARGET SHOOTING (any type of new shooting activity)





Air Rifle Target Shooting

*A look at how to help those interested,
but have not tried the sport.*

OVERVIEW – Moving People Into Air Rifle

Why the interest? Over half of hunters and shooters interested in air rifle say this is a means to spend more time outdoors and to spend time with friends and family.

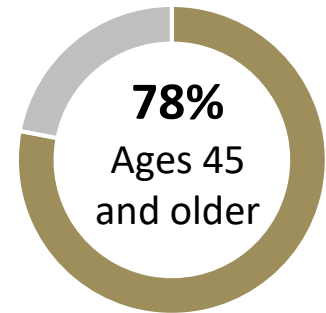
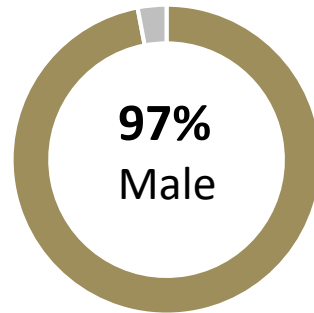
The majority (91%) of hunters that want to target shoot with air rifles currently hunt with a traditional rifle. Their father introduced them to the sport, but their first firearm was a shotgun. They started off hunting small game, but over half tried hunting other species within 5 years.

Target shooters who express an interest in air rifle have a very similar experience. They have experience in firing a traditional rimfire rifle and a traditional centerfire rifle at the shooting range. They are very familiar with plinking /informal target shooting as over half indicated this as their first shooting activity and over half of them continue to partake in it. However, only 10% are involved in only one type of shooting activity. Over half started doing different types of shooting activities within the first five years after they were also introduced to the sport by their father.

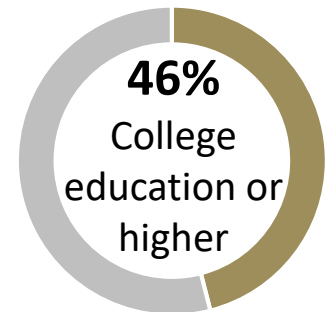
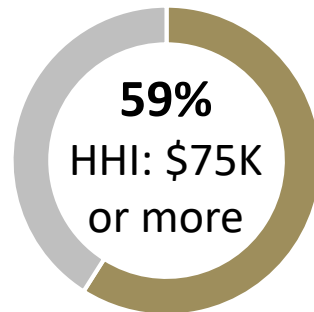
These hunters and shooters are involved in different shooting activities, but not having enough time prevents them from trying air rifle. Of course, not owning an air rifle or having access to one is a problem as well. To overcome this, respondents indicated that their friend, followed by their father, is the most influential in trying new shooting activities and not having anyone to go with is not an issue for them. In fact, receiving an invitation from a friend and joining a local range would most likely encourage them to try the sport.



Key Demographics

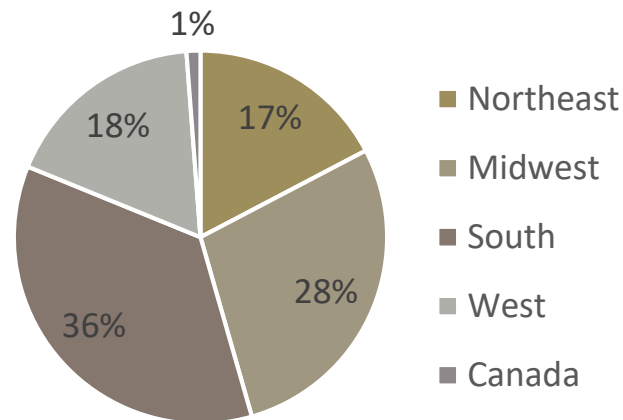


Avg. Age: 55



Of current hunters & target shooters who do not shoot air rifle but want to, most are male, middle-aged, affluent and/or educated. They are more likely to live in the Midwest and in the South.

Region



MOVING HUNTERS INTO AIR RIFLE



What Do They Currently Hunt? (THOSE WHO WANT TO TRY AIR RIFLE)



89%

Deer



63%

Turkey



62%

Small Game



53%

Upland Game
Birds



45%

Predators



35%

Waterfowl



23%

Wild pig



17%

Bear



17%

Elk



10%

Other Big
Game

91% hunt with a shotgun and 90% hunt with a traditional rifle. Over half said that their father took them on their first hunt and their first firearm was a shotgun. 35% of them said their first firearm was a traditional rifle. Less than twenty percent were introduced to hunting by a friend. Over half (58%) started with small game. Majority (95%) have tried at least one other activity. For those that did, it took 2 – 5 years for 38% of them to try a new species and only one season for 27% of them.

Q: Which methods do you currently hunt with? (N=909); Which species are you currently targeting? (N=861); Who took you on your first hunt? (N=906); On your first hunt, what species did you target? (N=909); What was your first firearm? (N=X). How many years did you only hunt [first species hunted] before attempting to hunt another species? (N=901); What type of firearm, bow or crossbow did you use on your first hunt? (N=909).

MOVING TARGET SHOOTERS TO AIR RIFLE



What Types of Shooting They Currently Do? (THOSE WHO WANT TO TRY AIR RIFLE)

Plinking / Informal Target Shooting 90%

Sighting-in 76%

Sporting Clays with a Shotgun 39%

Pattern Shotgun 39%

Teaching / Informative 35%

Skeet with a Shotgun 33%

Trap with a Shotgun 33%

Target Shooting with a Traditional
/Compound Bow 33%

Long Range with a Traditional
Centerfire Rifle 31%



Over half (64%) of target shooters say their father introduced them to the sport and only 11% were introduced by a friend. Shooters are using several firearms with the two most popular activities, plinking / informal target shooting and sighting-in. Over half of them are plinking / informal target shooting with either using a semi-automatic handgun, traditional rimfire rifle or traditional centerfire rifle. They are most likely to shoot a traditional centerfire rifle, a traditional rimfire rifle or a semi-automatic handgun with sighting-in.

PATHS TO AIR RIFLE



REASONS WHY THEY HAVEN'T TRIED AIR RIFLE TARGET SHOOTING



33% reported
“don’t own or
have access to
the proper
equipment.”

**Don’t own proper
equipment**



32%
reported “not
having
enough time.”

Not enough time



10% indicated
“they don’t have
anyone to go
with.”

No one to go with



7% say “they
don’t know how
to get started.”

Don’t know how

Not owning or having access to an air rifle and not having enough time prevent a significant amount from getting involved. Affordability and knowing how to partake in air rifle is not an issue for them. Only 6% indicated that they didn’t know how to get started and 4% said that it was too expensive for them.

HOW TO HELP THEM TRY AIR RIFLE



43%

“Join a local range”



39%

“An invitation from a friend / family member”



30%

“Books / Magazines”



29%

“Program offered by an outdoor retailer”



26%

“YouTube videos”



26%

“Program offered by a state wildlife agency”



21%

“Membership in a non-profit organization that is specific to this activity”



15%

“Online forums / blogs”

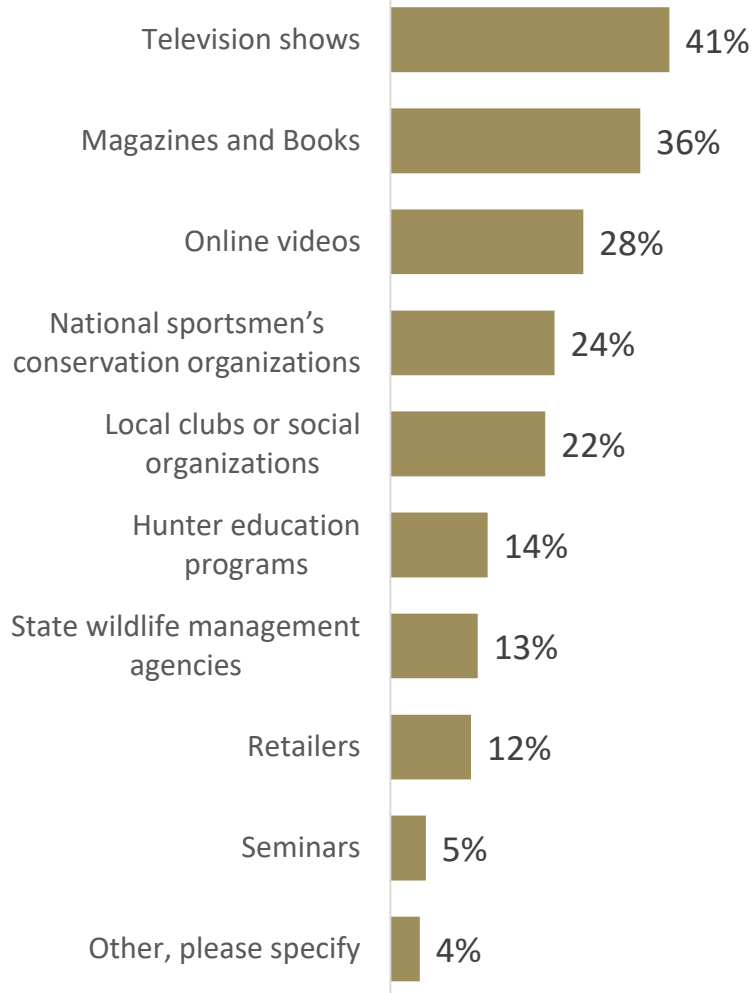


53% of hunters and 46% of shooters say “friends” are the greatest influence in trying new types of hunting and shooting activities. Generating awareness through local ranges, providing programs hosted by outdoor retailers and state wildlife agencies and encouraging active air rifle target shooters to invite friends will help more people engage in the sport.

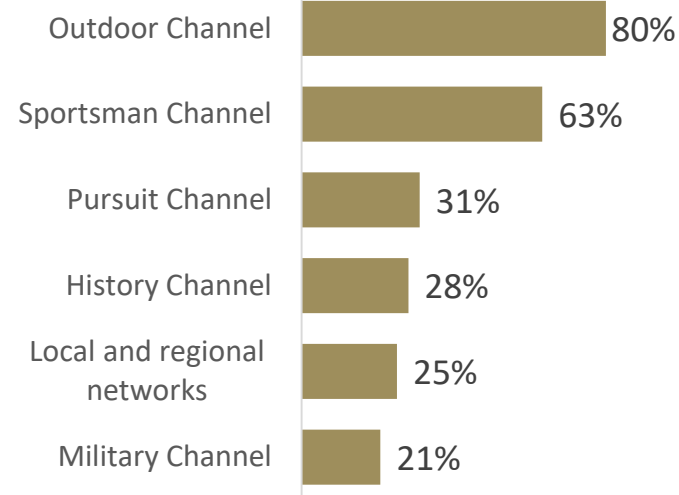
MOST INFLUENTIAL SOURCES FOR TRYING AIR RIFLE

These hunters and shooters can be reached and influenced through multiple channels.

TOP SOURCES



TOP TV CHANNELS



TOP ONLINE VIDEOS



Q: Which of the following media or information sources have had the most influence, or intrigued you the most in regards to trying different types of shooting? (N=1,245); Which type of online videos have you viewed with respect to influencing you to try different types of shooting? (N=345). What channel did you watch hunting and fishing programs on? (N=501).

Authors / Contributors

Southwick Associates, Inc.

Southwick Associates is a market research, statistics and economics firm specializing in the outdoor recreation markets. For more than 25 years, Southwick Associates has delivered comprehensive insights that have advanced strategic decisions across the entire outdoor community; from resource agencies, industry associations and non-profit organizations to utilities and outdoor manufacturers and businesses. We find solutions to problems others cannot solve. For more information and solutions, contact Nancy Bacon, Vice President, at Nancy@SouthwickAssociates.com.

National Shooting Sports Foundation

The National Shooting Sports Foundation is the trade association for the firearms industry. Its mission is to promote, protect and preserve hunting and the shooting sports. Formed in 1961, NSSF has a membership of more than 12,000 manufacturers, distributors, firearms retailers, shooting ranges, sportsmen's organizations and publishers. For more information, visit www.nssf.org/research.

