



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.

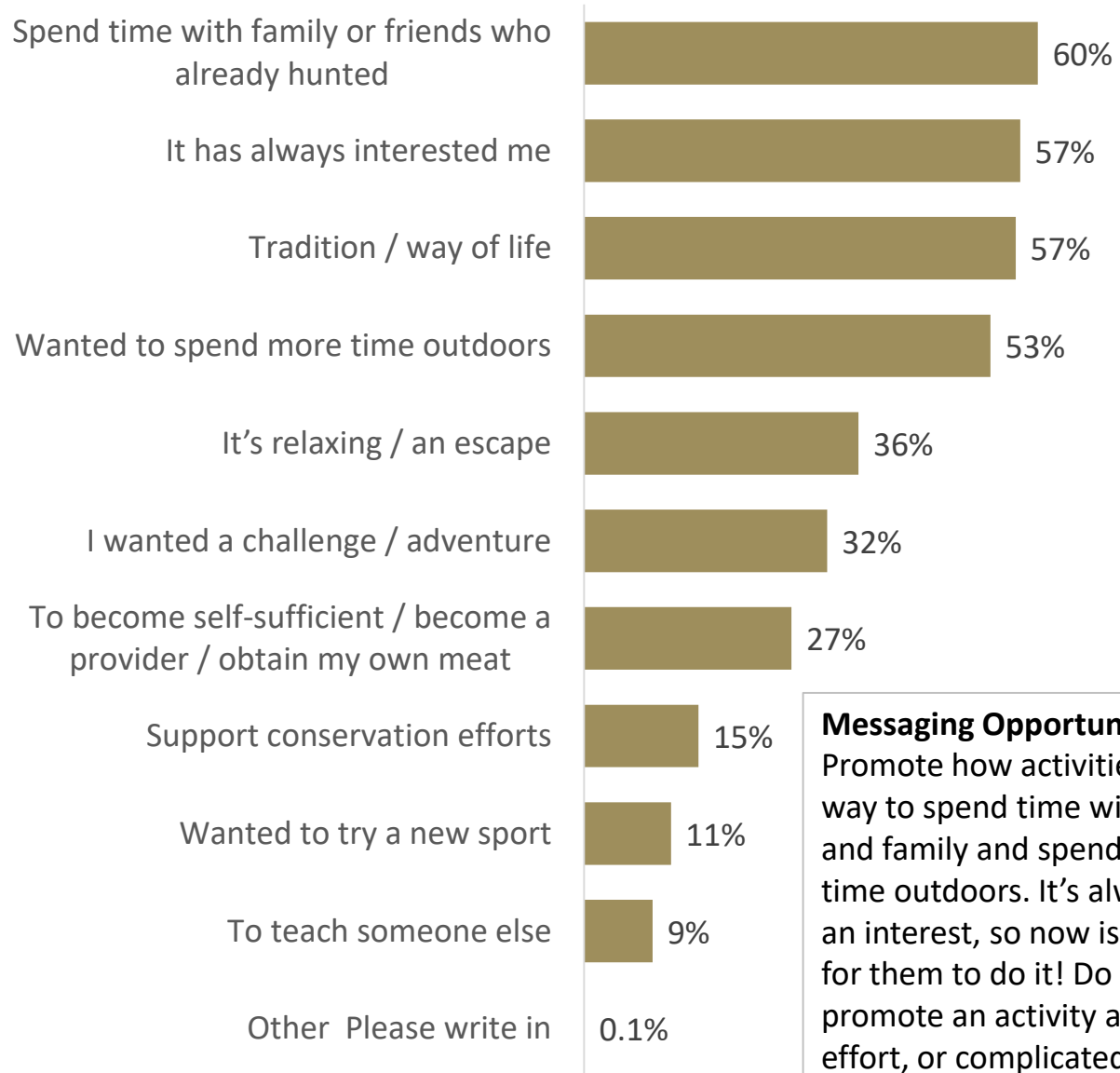
Introduction

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.

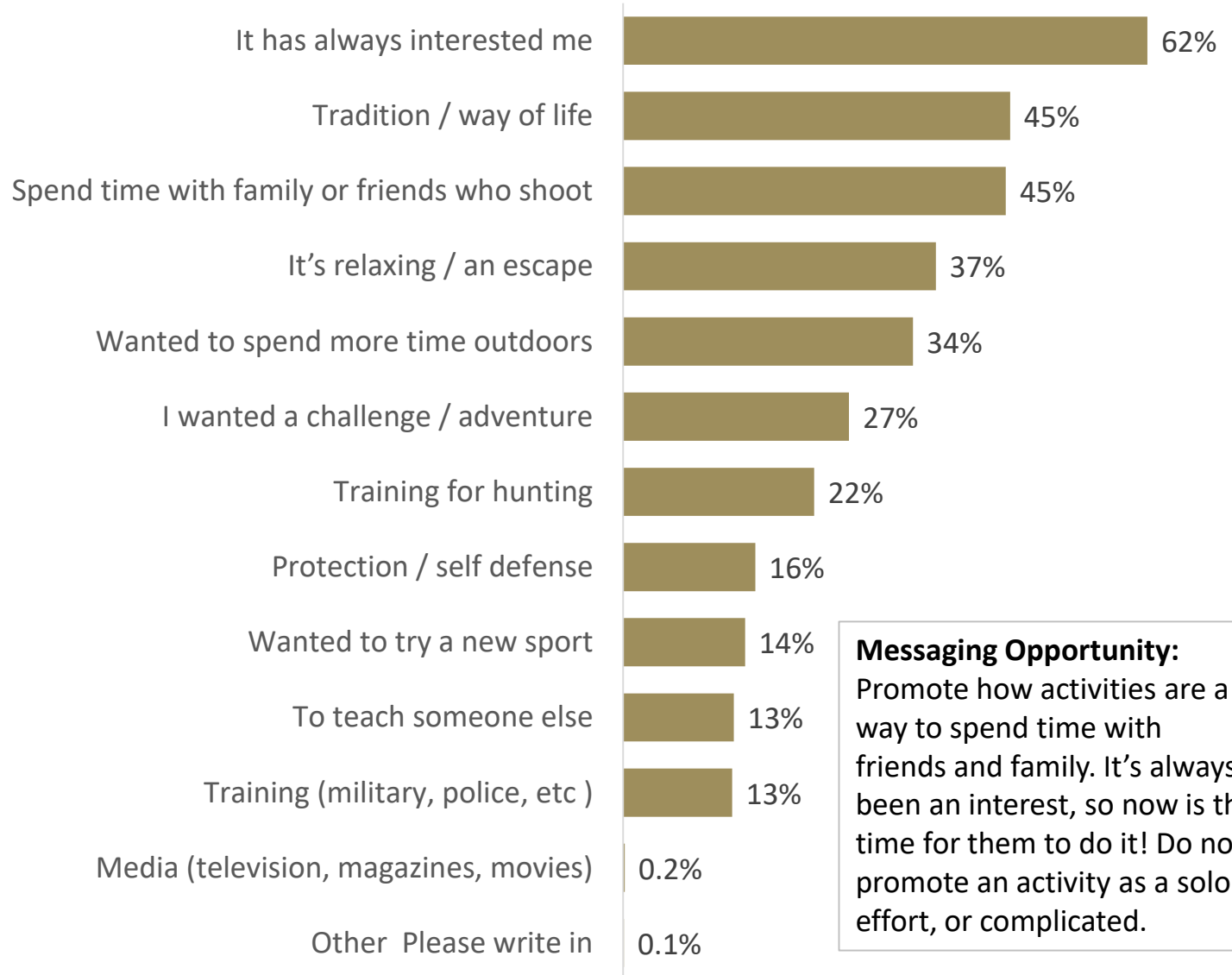
Thank you for your interest in helping advance hunting and shooting sports.

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)





Crossbow Target Shooting

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

OVERVIEW – Moving People Into Crossbow

Less than one percent of hunters and target shooters has experience in target shooting with a crossbow.

Twenty-seven percent of respondents have shot a crossbow while hunting in the past three years. The majority of hunters are using either a traditional rifle (89%) or shotgun (88%). A little over half (59%) say their father introduced them and 56% of them started with small game. Only 5% have not tried other species.

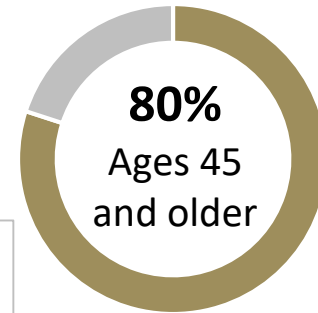
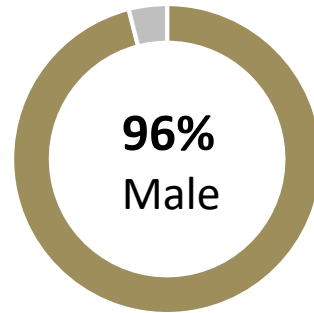
Two-thirds (69%) of shooters say their father introduced them to the sport and 81% started with plinking / informal target shooting. After starting out with a traditional rimfire rifle, they are currently using a variety of firearms. For example, the top three firearms used with plinking are semi-automatic handgun (63%), traditional rimfire rifle (61%) and a traditional centerfire rifle (56%). Only 10% have only participated in just one type of shooting activity.

Although they have friends to go to the range with, 56% say not having access to a crossbow is preventing them from shooting one. An opportunity could be to provide more rental opportunities so people can test shoot a crossbow.

Not having enough time, the expense and not knowing how to get started are also challenges for some. However, their friends are the most influential in trying a new activity and so receiving an invitation from a friend or joining a local range would motivate them to try target shooting with a crossbow. Local ranges have an opportunity to generate more awareness via television, magazines and newsletters. In addition, programs hosted by state agencies and outdoor retailers can also inspire them to engage in the sport.

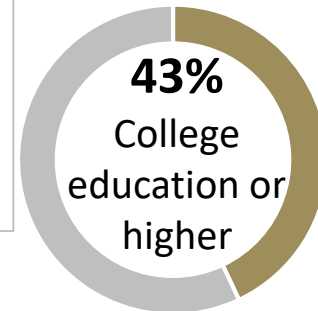
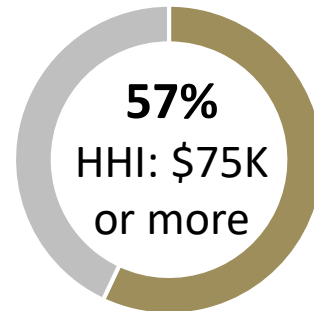


Key Demographics

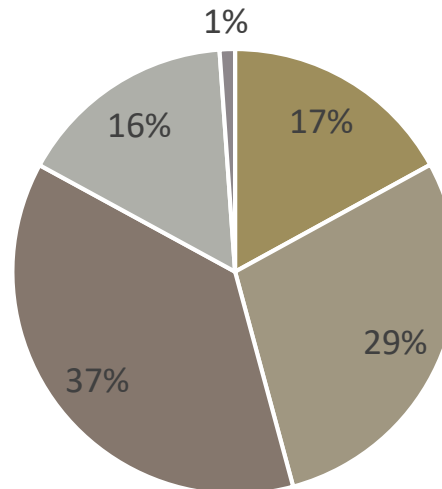


Of current hunters & target shooters who do not shoot with a crossbow but want to, most are male, middle-aged, affluent and/or educated. They are more likely to live in the Midwest and in the South.

Avg. Age: X



Region



- Northeast
- Midwest
- South
- West
- Canada



MOVING HUNTERS INTO CROSSBOW



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



90%

Deer



64%

Turkey



56%

Small Game



50%

Upland Game



43%

Predators



34%

Waterfowl



23%

Wild Hog



16%

Elk



16%

Bear



8%

Other Big
Game



They are using different firearms to hunt these species. 27% of them hunt with a crossbow, but the majority are using either a traditional rifle (89%) or shotgun (88%). A little over half (59%) say their father introduced them and 56% of them started with small game. Only five percent haven't tried hunting other species. For those that did, it took between two to five years for 40% of them and only one season for 26% of them.

MOVING TARGET SHOOTERS TO CROSSBOW



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

Plinking / Informal Target Shooting 88%

Sighting-in 77%

Pattern Shotgun 38%

Sporting Clays with a Shotgun 37%

Teaching / Informative 33%

Benchrest with a traditional
centerfire rifle 32%

Target Shooting with a Traditional
or Compound Bow 32%

Trap with a Shotgun 31%

Skeet with a Shotgun 31%

Long Range with a Traditional
Centerfire Rifle 30%

Target Shooting with a
Muzzleloader 27%



Two-thirds (69%) of shooters say their father introduced them to the sport and only 10% were introduced by a friend. Eighty-one percent started with plinking and then within two to five years, 32% of shooters tried a new activity and 29% branched out within a year. However, less than one percent has tried shooting crossbow. They are more likely to shoot a semi-automatic handgun, traditional rimfire rifle and a traditional centerfire rifle.

PATHS TO CROSSBOW



REASONS WHY THEY HAVEN'T TRIED CROSSBOW



56% say “don’t own or have access to the proper equipment.”

Don’t own equipment



18% say “there is not enough time.”

No time



15% reported “too expensive.”

Too expensive

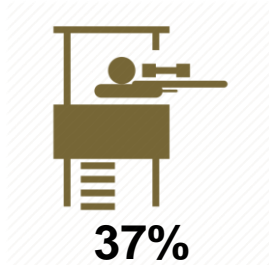


11% say “they don’t know how to start.”

Don’t know how

Not having access to a crossbow is the only significant issue for them. Time, expense and not knowing how to start are challenges for very few. An opportunity may be rental programs or events where they can try crossbow.

HOW TO HELP THEM TRY CROSSBOW



“Join a local range”



“An invitation from a friend / family member”



“Program offered by an outdoor retailer”



“Program offered by a state wildlife agency”



“YouTube videos”



“Books / Magazines”



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



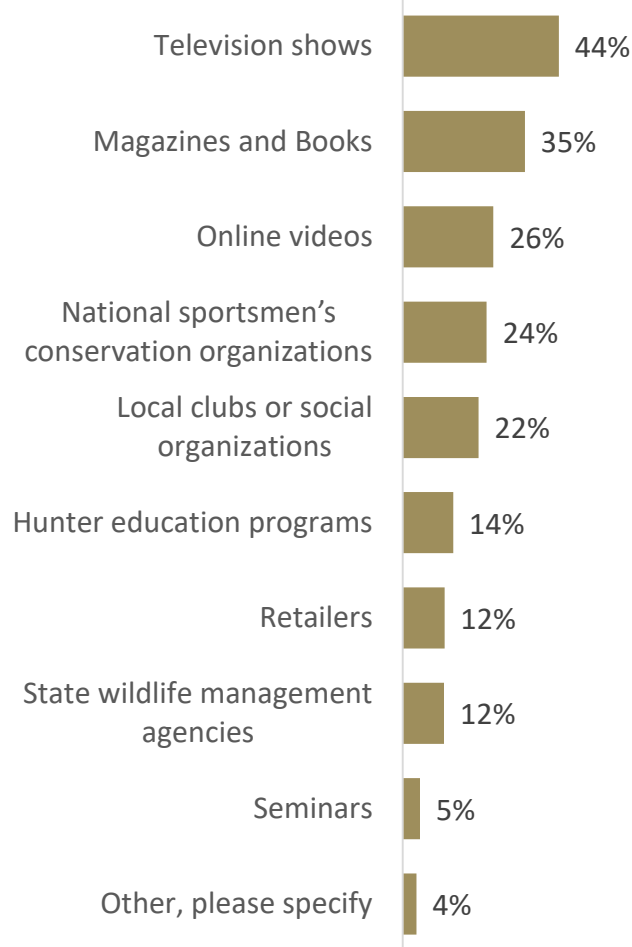
“Online forums / blogs”

55% 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 shooters to invite friends will help more people engage in the sport.

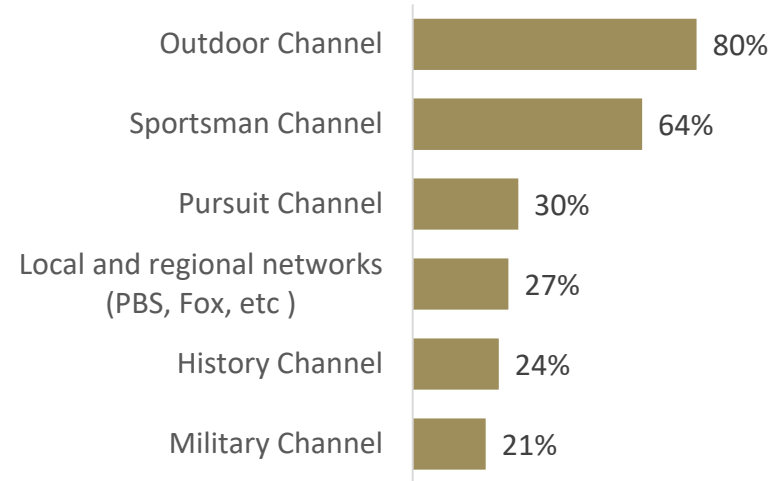
MOST INFLUENTIAL SOURCES FOR TRYING CROSSBOW

These hunters and shooters can be reached and influenced primarily through television and print.

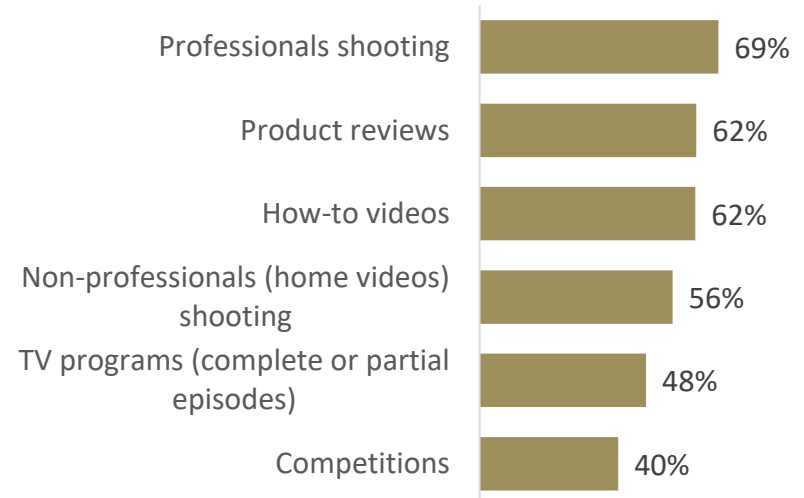
TOP SOURCES



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=2,578); Which type of online videos have you viewed with respect to influencing you to try different types of shooting? (N=2,578). What channel did you watch shooting and fishing programs on? (N=1,141).

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.

