



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.

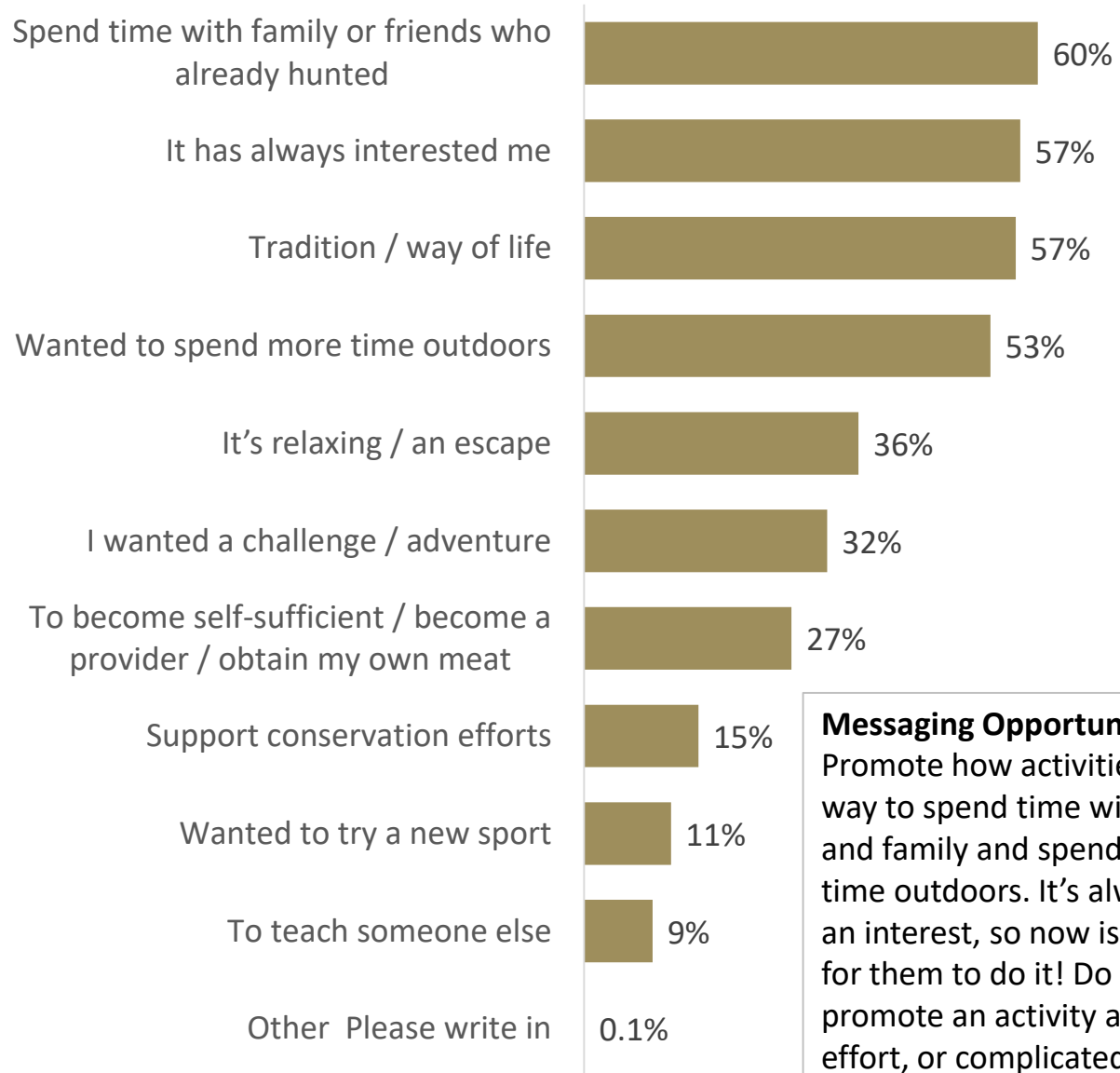
Introduction

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.

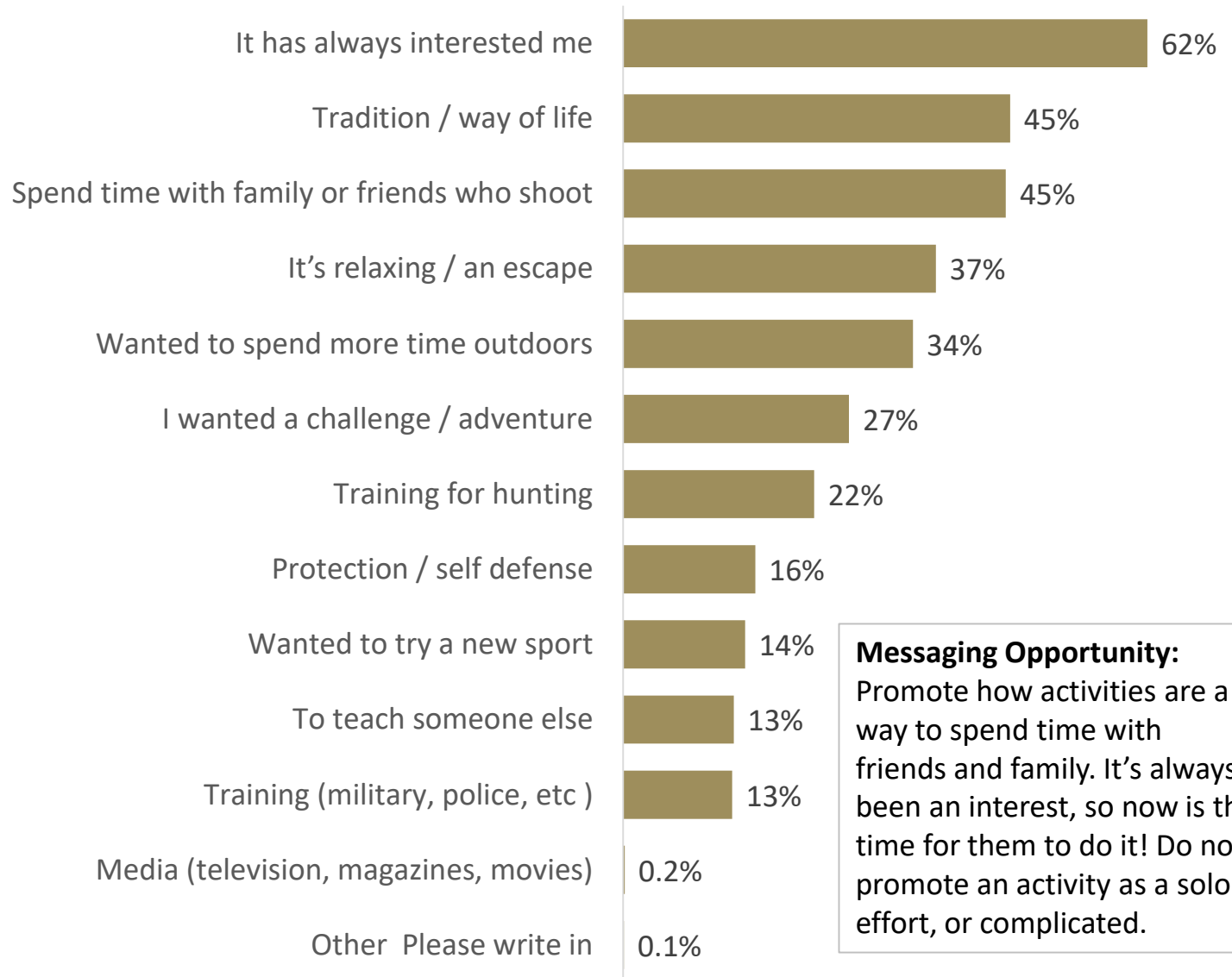
Thank you for your interest in helping advance hunting and shooting sports.

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)





Elk Hunting

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

OVERVIEW – Moving People Into Elk Hunting

Affluent, middle-aged hunters and shooters that live in the South and Midwest are interested in elk hunting.

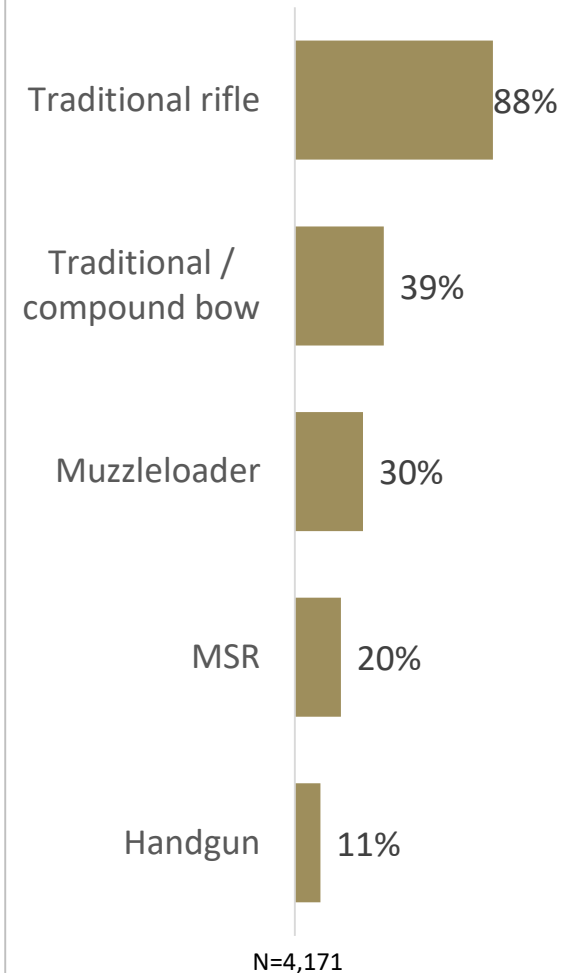
Majority of hunters (91%) have experience in deer hunting and 90% of them are currently hunting with a traditional rifle. They are hunting different species and say their friend has been their biggest influence. Although target shooters don't have any experience with big game, over half of them are using a traditional rifle at the shooting range. Like hunters, their friends have influenced them to try other shooting activities.

With elk primarily in western North America, accessibility and cost are the biggest problems for these hunters and shooters. Having the time and have someone to go with is actually not an issue for them. Providing more close-to-home opportunities that are easily accessible in regions that have elk habitat and / or educating the public on local opportunities may help grow the sport.

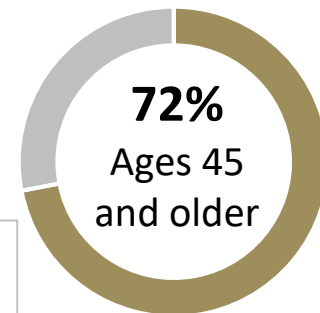
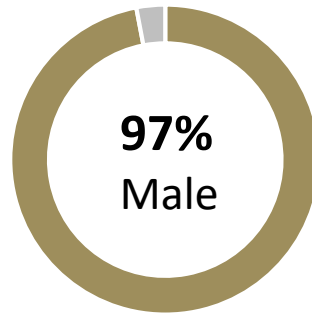
Receiving an invitation from a friend or participating in some type of program held by a state agency or a retailer may encourage them as well. In addition, stories on professionals' and non-professionals' elk hunts and promoting how-to information via television, magazines, newsletters and online videos may motivate them to go elk hunting.



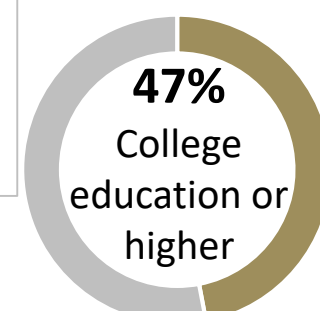
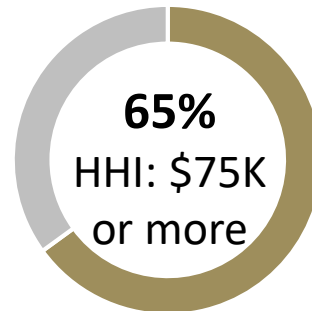
Desired Firearms to Hunt Elk



Key Demographics

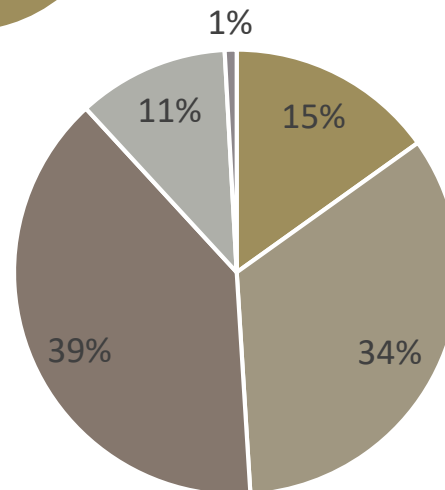


Avg. Age: 52



Of current hunters & target shooters who do not go elk hunting 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



- Northeast
- Midwest
- South
- West
- Canada



MOVING HUNTERS INTO ELK HUNTING



What Do They Currently Hunt?

(THOSE WHO WANT TO TRY ELK HUNTING)



91%

Deer



70%

Turkey



59%

Small Game



54%

Upland Game



46%

Predators



38%

Waterfowl



15%

Bear



8%

Other Big
Game



5%

Wild pig



25%

Others



Majority of these hunters have experience with big game and 91% of them currently hunt with a traditional rifle and 88% hunt with a shotgun. Two thirds (61%) say their father took them on their first hunt and roughly half (56%) started with small game hunting. Majority (95%) have tried at least one other activity. For those that did, it took 2 – 5 years for 39% of them to try a new species and only one season for 30% of them.

MOVING TARGET SHOOTERS TO ELK HUNTING



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

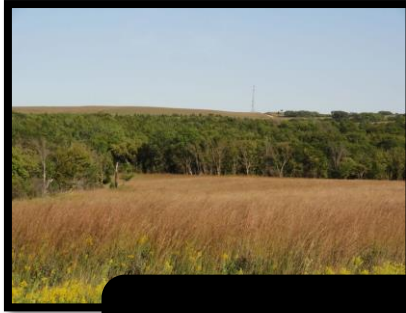


Over half (70%) of shooters say their father introduced them to the sport and only 9% were introduced by a friend. The majority say their first activity was plinking and then seventy-nine percent of them tried another shooting activity within five years. Over two thirds of them are using a traditional rifle for plinking / informal target shooting and sighting-in.

PATHS TO ELK HUNTING



REASONS WHY THEY HAVEN'T TRIED ELK HUNTING



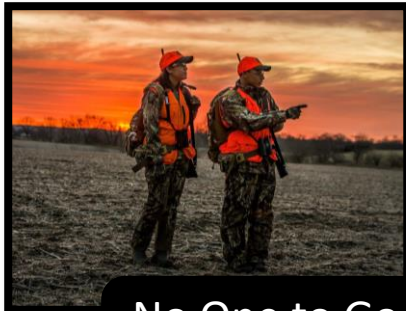
Not Available

57% reported “can’t find species in my part of country” and another **24%** believe “there is no convenient place to hunt.”



Too expensive

47% say “too expensive.”



No One to Go With

15% reported “not having anyone to go with.”



Not enough time

9% say “do not have time.”

The expense and not able to go elk hunting where they live makes the opportunity seem very unfeasible for them. Providing more close-to-home opportunities that are easily accessible in regions that have huntable elk populations via public access programs and / or educating the public on local opportunities may help grow the sport.

HOW TO HELP THEM TRY ELK HUNTING



45%

“An invitation from a friend / family member”



33%

“Books / Magazines”



31%

“Program offered by a state wildlife agency”



28%

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



23%

“YouTube videos”



23%

“Program offered by an outdoor retailer”



20%

“Join a local hunt club”



17%

“Online forums / blogs”

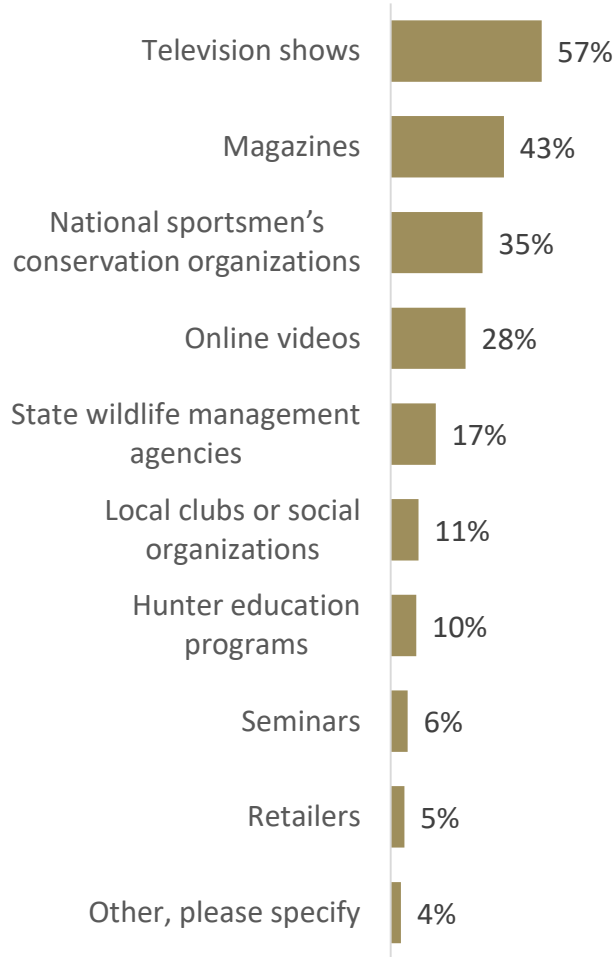


54% of hunters and 49% of shooters say “friends” are the greatest influence in trying new types of hunting and shooting activities. Generating awareness through editorial content (sharing elk hunting stories) in magazines, word-of-mouth through family and friends, providing programs hosted by outdoor retailers, state wildlife agencies and other nonprofit organizations will help people try the sport.

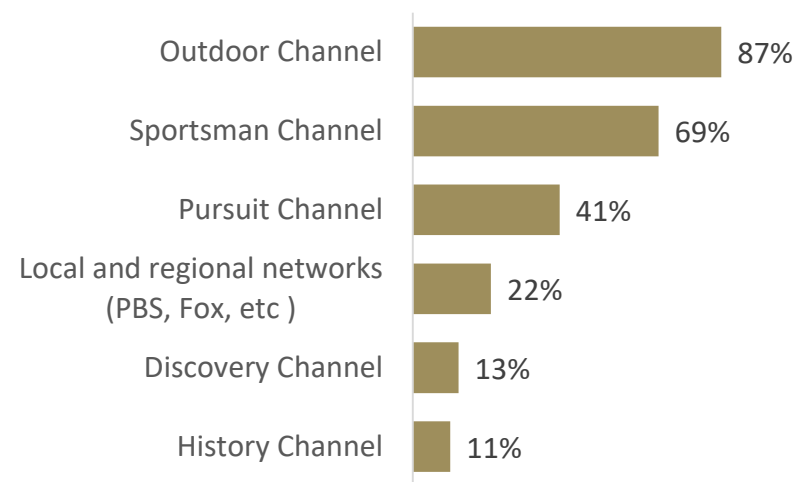
MOST INFLUENTIAL SOURCES FOR TRYING ELK HUNTING

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

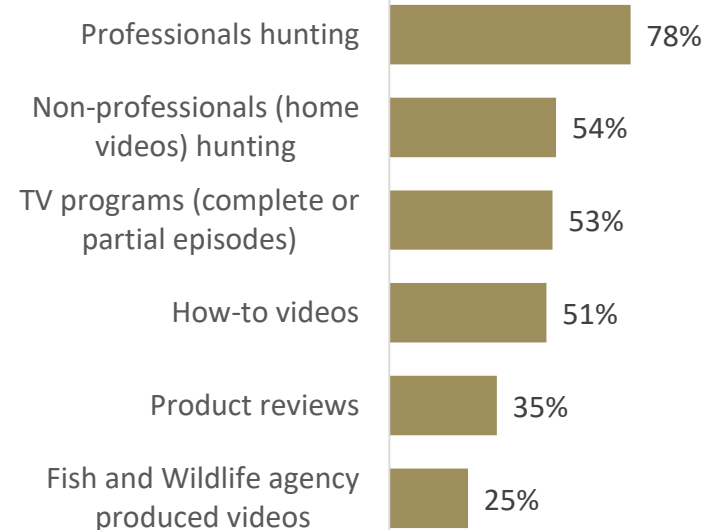
TOP SOURCES



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 hunting? (N=2,577); Which type of online videos have you viewed with respect to influencing you to try different types of hunting? (N=1,099). What channel did you watch hunting and fishing programs on? (N=2,217).

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.

