



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.

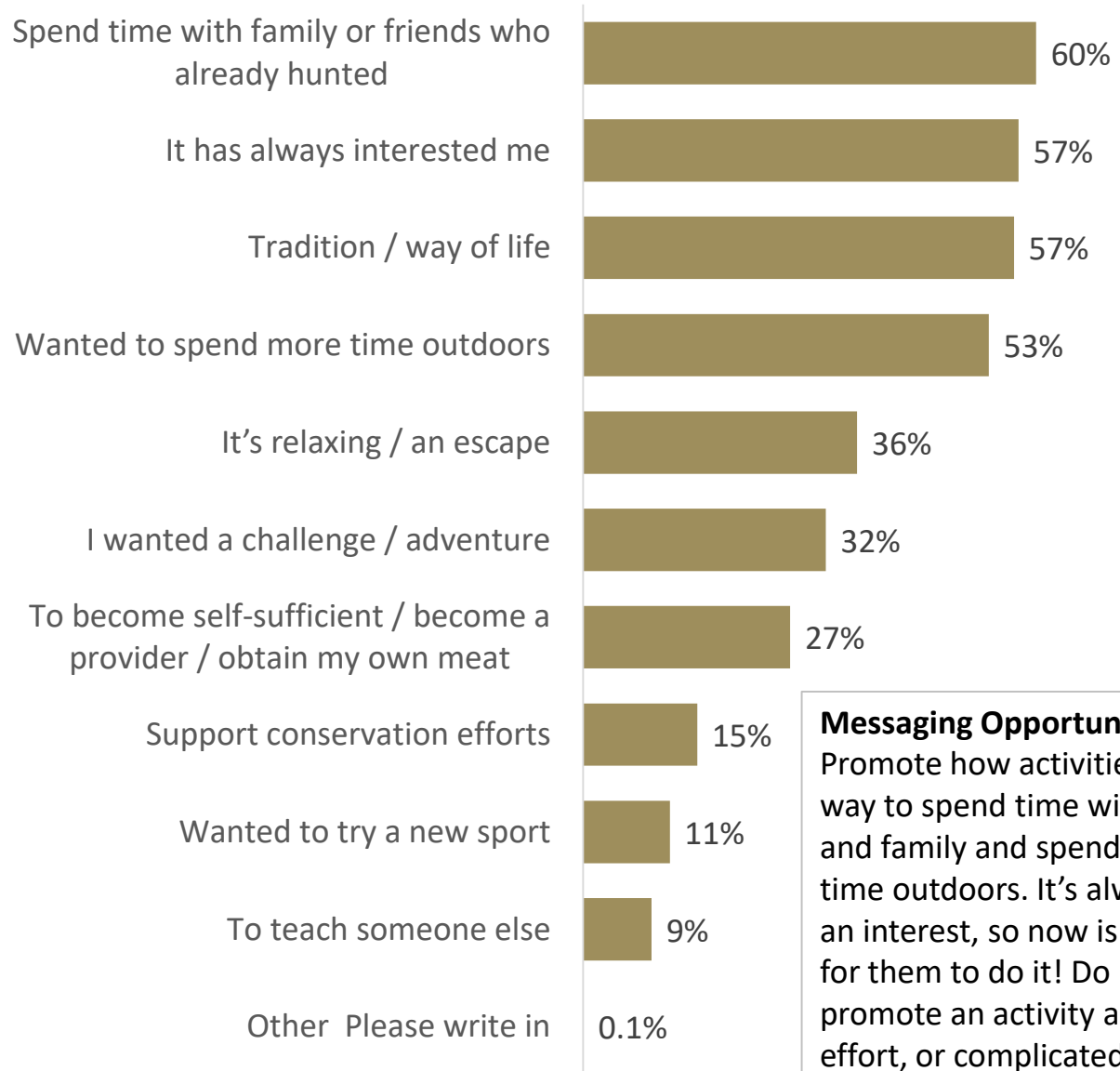
Introduction

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.

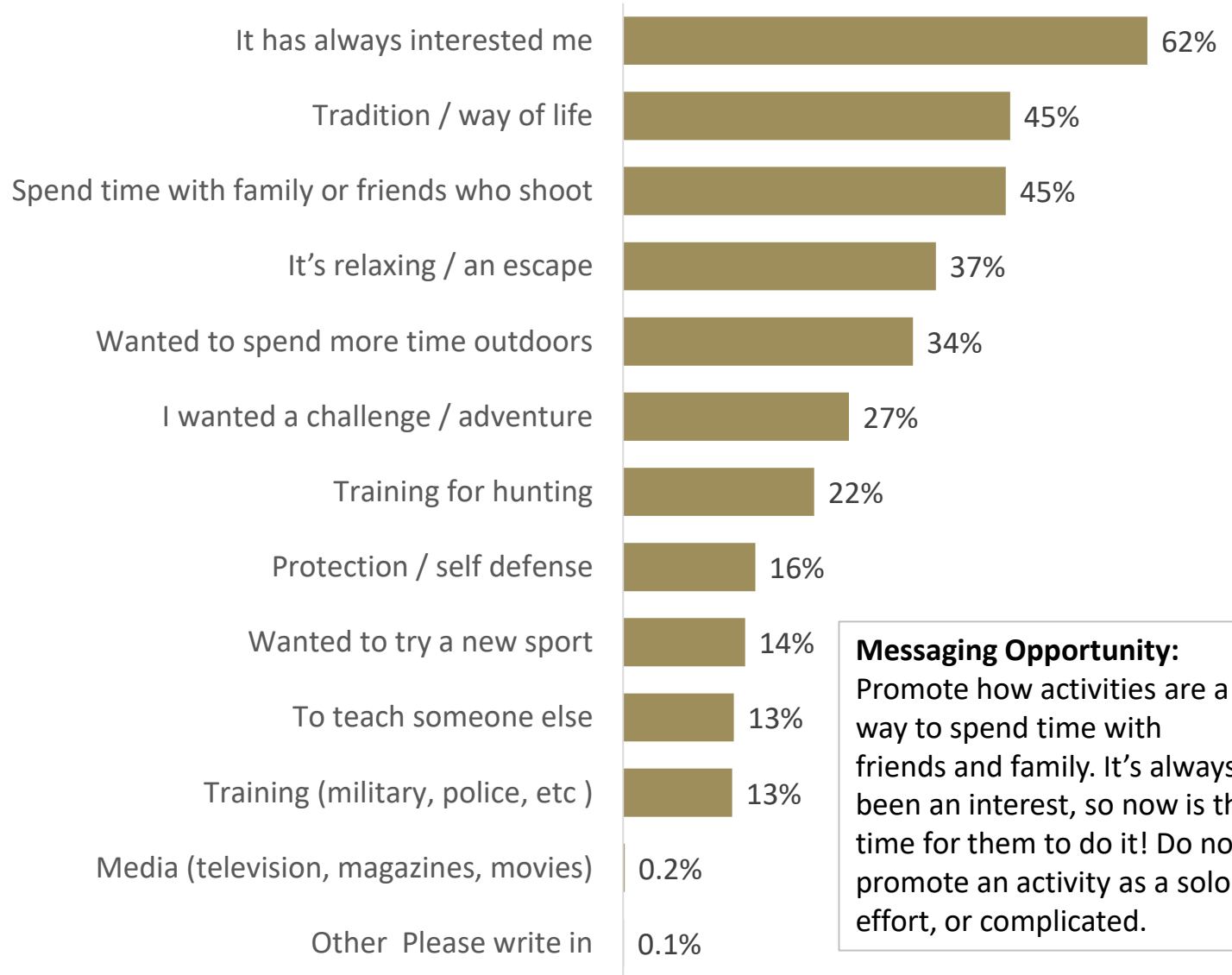
Thank you for your interest in helping advance hunting and shooting sports.

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)





Muzzleloader Target Shooting

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

OVERVIEW – Moving People Into Muzzleloader

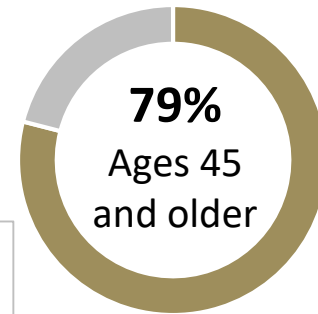
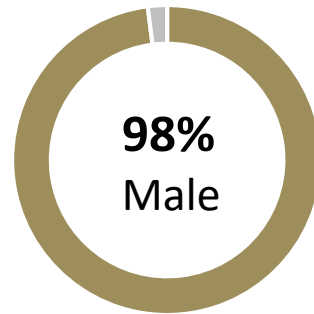
Roughly 32% of target shooters have experience in target shooting with a muzzleloader and 50% of hunters have used a muzzleloader to hunt in the past three years. Both hunters and target shooters were introduced by their father. Hunters started out going small game hunting with a shotgun and then moved on to using a traditional rifle and other firearms. Eighty-one percent of target shooters started with plinking and 40% of them had a traditional rimfire rifle as their first firearm. They have done other activities, but plinking is the most common activity. They are currently target shooting with a semi-automatic handgun, traditional rimfire rifle or a traditional centerfire rifle.

Not enough time appears to be the biggest problem for those wanting to try or return to the sport. For newcomers, not having access to a muzzleloader is preventing them from trying to shoot one for the first time. Not having anyone to go with and not knowing how to get started are also issues for some. Creating group shooting events and offering rental opportunities may motivate them to shoot a muzzleloader at the local range.

Hunters and shooters say that receiving an invitation from a friend or joining a local shooting range would motivate them the most to try or get back into target shooting with a muzzleloader. 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.

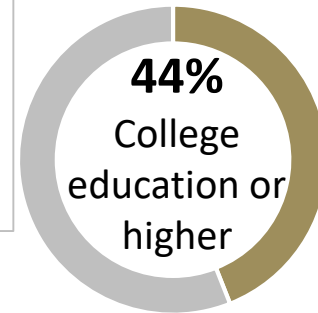
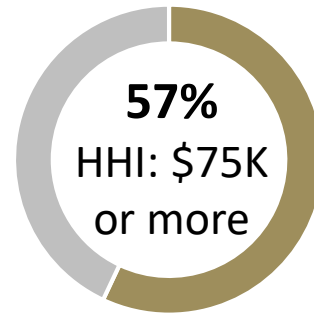


Key Demographics

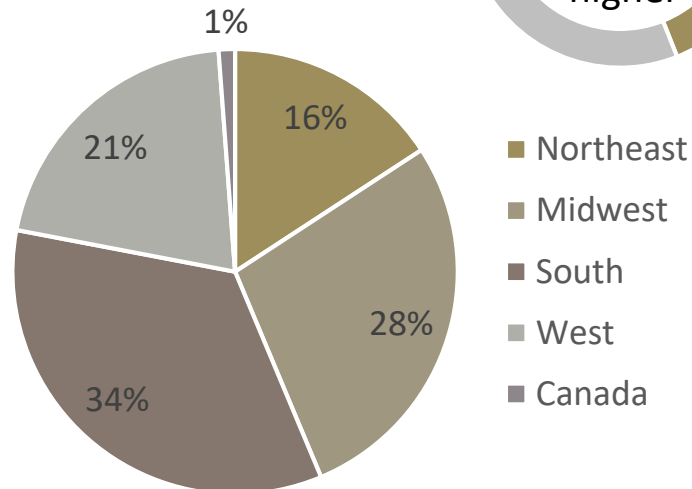


Of current hunters & target shooters who do not shoot with a muzzleloader but want to, most are male, middle-aged, affluent and/or educated. They are less likely to live in the Northeast.

Avg. Age: 55?



Region



MOVING HUNTERS INTO MUZZLELOADER



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



90%

Deer



63%

Turkey



57%

Small Game



52%

Upland Game



44%

Predators



34%

Waterfowl



22%

Wild Hog



22%

Elk



20%

Bear



11%

Other Big
Game



They are using different firearms to hunt these species. 50% of them are using a muzzleloader, but the two most popular firearms are traditional rifle (91%) and shotgun (88%). Two-thirds say their father introduced them and 55% of them went small game hunting. Only 4% haven't tried other species. For those that did, it took between two to five years for 42% of them and only one season for 27% of them.

MOVING TARGET SHOOTERS TO MUZZLELOADER



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

Plinking / Informal Target Shooting 90%

Sighting-in 78%

Pattern Shotgun 40%

Sporting Clays with a Shotgun 38%

Teaching / Informative 34%

Trap with a Shotgun 34%

Target Shooting with a Traditional
or Compound Bow 34%

Skeet with a Shotgun 33%

Target Shooting with a
Muzzleloader 32%

Benchrest with a traditional
centerfire rifle 31%



Two-thirds (64%) of shooters say their father introduced them to the sport and only 11% were introduced by a friend. Eighty-one percent started with plinking and 40% of them used a traditional rimfire rifle. Within two to five years, 33% of shooters tried a new activity and 26% branched out within a year. However, only 32% have experience in target shooting with a muzzleloader. The top three firearms being used with plinking are semi-automatic handgun (65%), traditional rimfire rifle (63%) and a traditional centerfire rifle (58%).

PATHS TO MUZZLELOADER



REASONS WHY THEY HAVEN'T TRIED MUZZLELOADER



28% say “don’t own or have access to the proper equipment.”

Don’t own equipment



23% say “there is not enough time.”

No time



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

Don’t know how

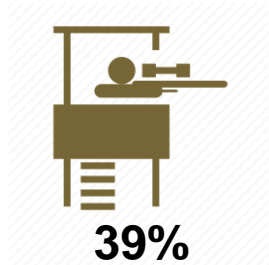


13% say “I don’t have anyone to go with.”

No one to go with

Not having access to a muzzleloader and time are the major issues for them. Some are having problems with not knowing how to start and not having anyone to go with the shooting range. Providing rental opportunities and events that allow them to shoot one may inspire them to take up the sport.

HOW TO HELP THEM TRY MUZZLELOADER



39%
“Join a local
range”



35%
“An invitation from a
friend / family
member”



26%
“Books /
Magazines”



25%
“Program offered
by a state wildlife
agency”



24%
“Program
offered by an
outdoor retailer”



23%
“YouTube
videos”



18%
“Membership in a
non-profit
organization that is
specific to this activity



13%
“Online forums /
blogs”

54% of hunters and 47% of shooters say “friends” are the greatest influence in trying new types of hunting and shooting activities. Generating awareness and offering rentals through local ranges, providing programs hosted by outdoor retailers and state wildlife agencies and encouraging active target shooters to invite friends will help more people engage in the sport.

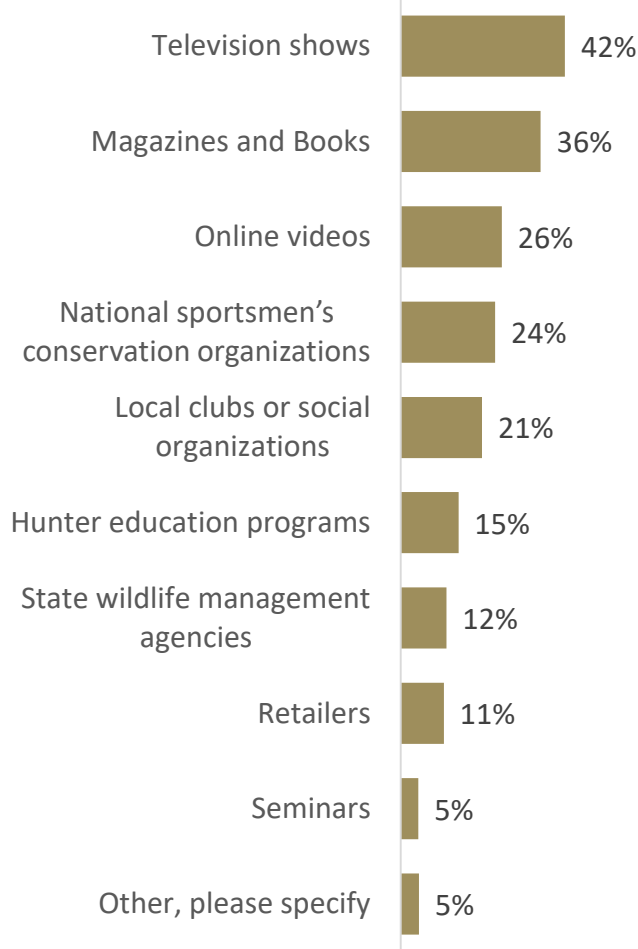
Q: What would help you get into that shooting activity that you’re interested in? (N=2,251); When it comes to individuals, who has the greatest influence on you with regard to trying different species or trying new hunting methods? (N=1,541). When it comes to individuals, who has the greatest influence on you with regard to trying different types of shooting? (N=2,121).



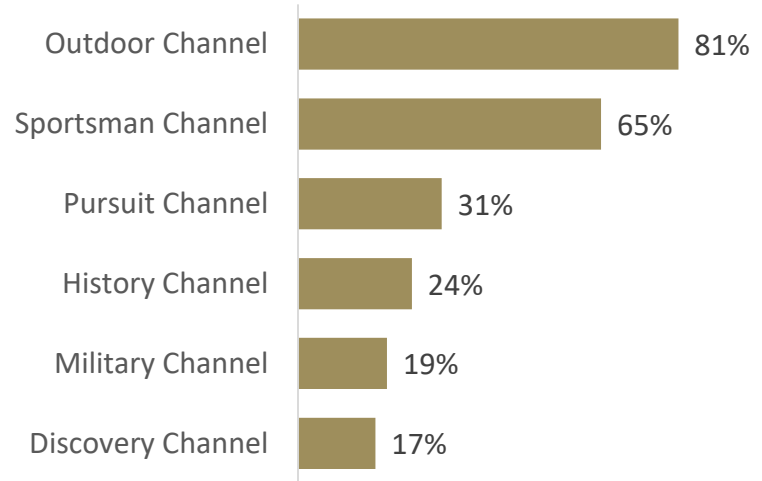
MOST INFLUENTIAL SOURCES FOR TRYING CROSSBOW

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

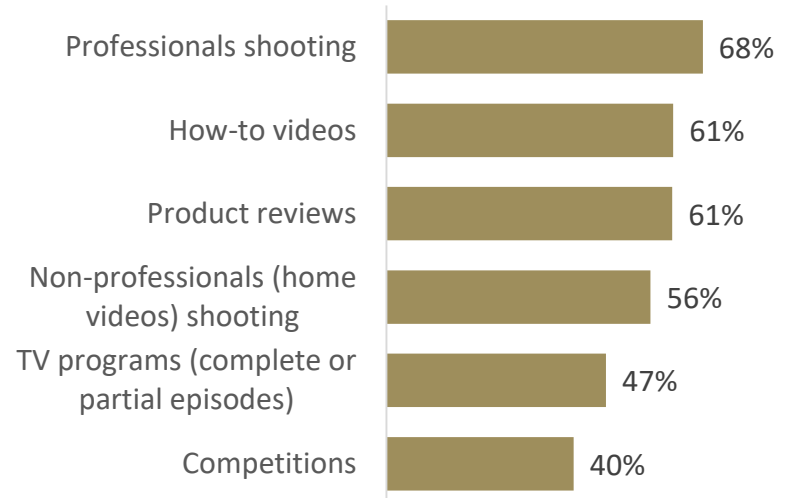
TOP SOURCES



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=2,093); Which type of online videos have you viewed with respect to influencing you to try different types of shooting? (N=537). What channel did you watch shooting and fishing programs on? (N=870).

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.

