



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.

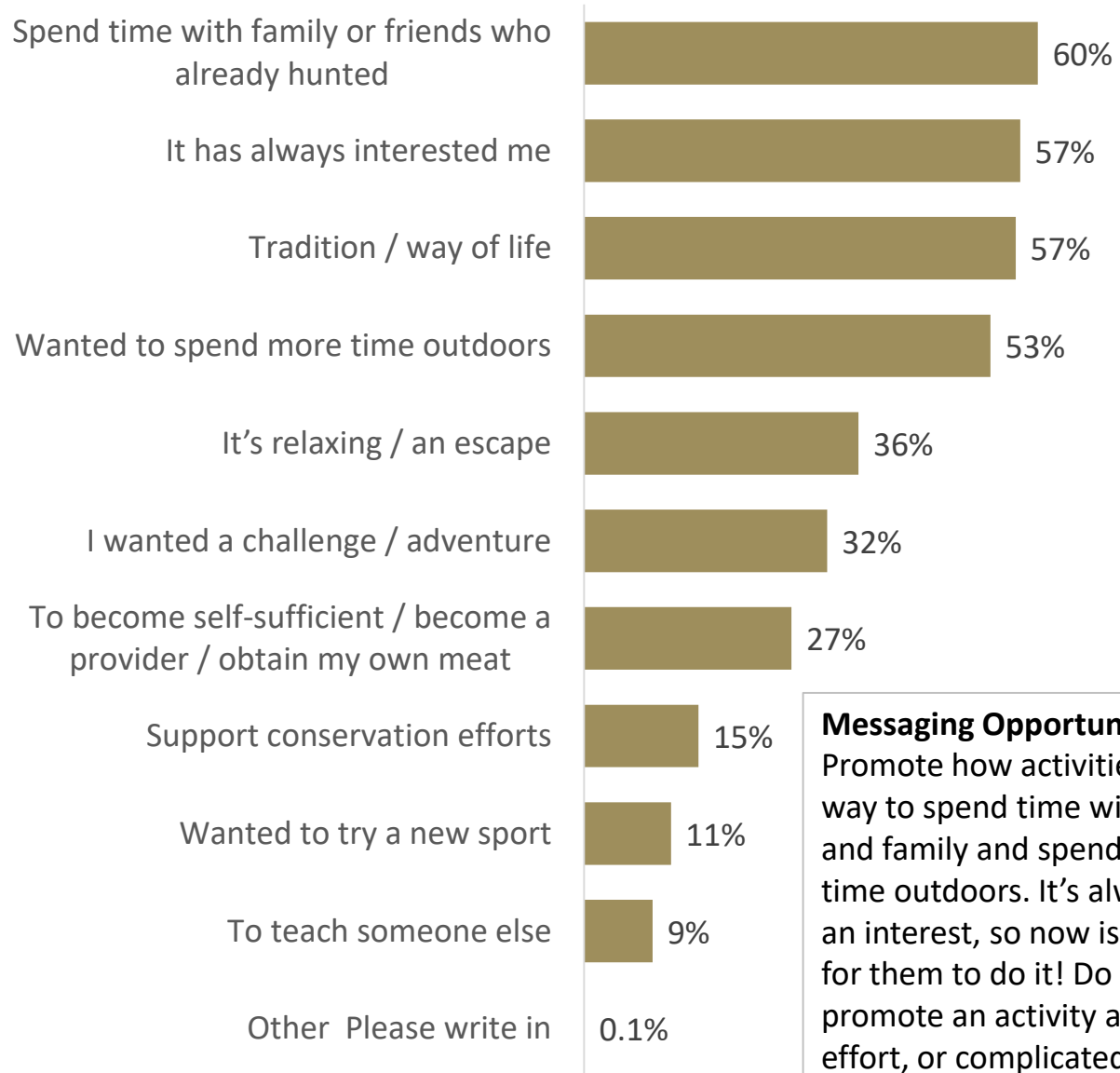
Introduction

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.

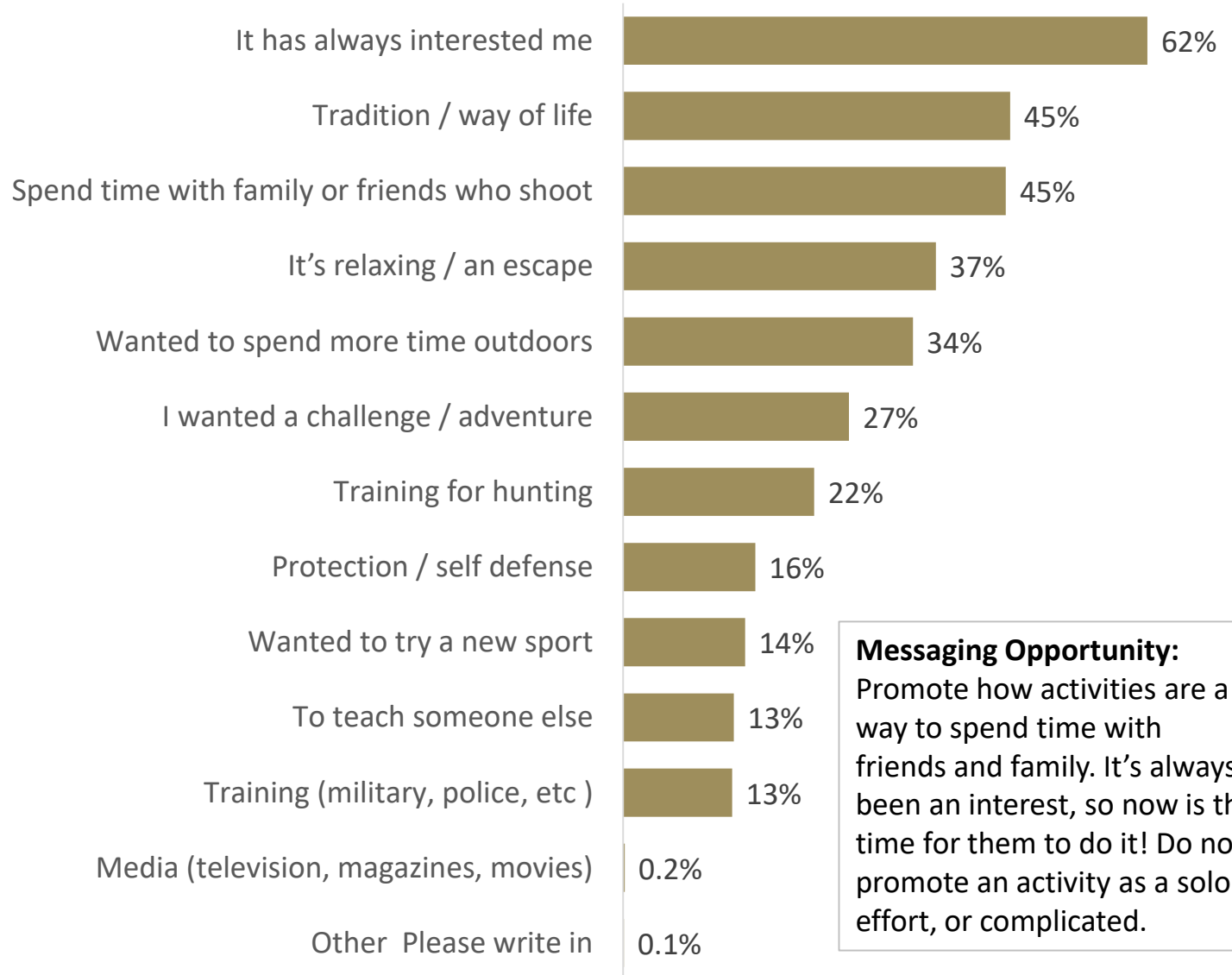
Thank you for your interest in helping advance hunting and shooting sports.

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)





Small Game Hunting

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

OVERVIEW – Moving People Into Small Game Hunting

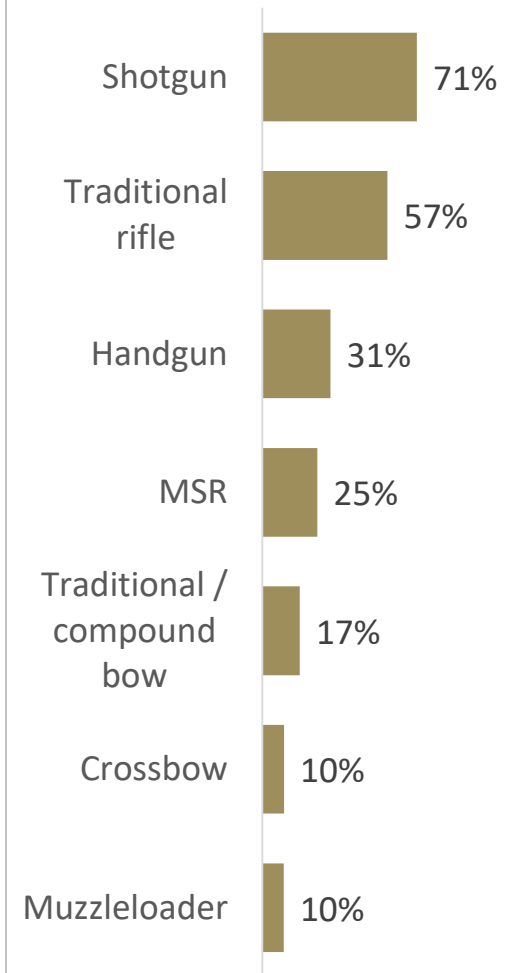
Affluent, middle-aged hunters and shooters that live in the South, Midwest and West are interested in hunting small game.

For nearly half of the hunters that are interested in small game, it's about getting back into it. Their father introduced them to small game hunting with a shotgun and then within 5 years, they were hunting other species. Like hunters, target shooters are also involved in more than one shooting activity and are using a variety of firearms. Both shooters and hunters say their friends are the biggest influence for trying new activities.

Unfortunately, nearly one-third believe that small game hunting is not a top priority during their free time and 24% claim there isn't a convenient place to hunt. Opening up new lands near urban areas and promoting the overall convenience and its benefits (more time outdoors, spending time with friends) may be an opportunity.

Receiving an invitation from a friend or participating in some type of program held by a state agency or a retailer may also encourage them to return or try the sport. In addition, stories on professionals' and non-professionals' small game hunts and promoting how-to information via television, magazines and newsletters may motivate them as well.

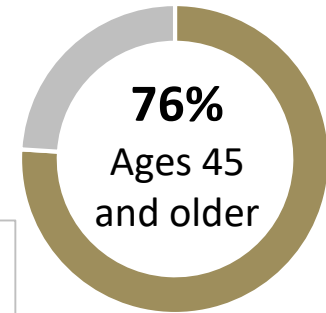
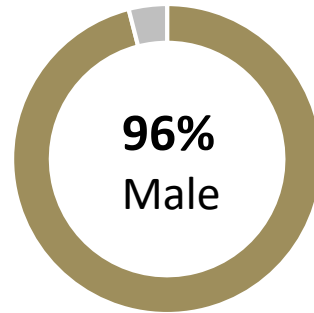
Desired Firearms to Hunt Small Game



N=996

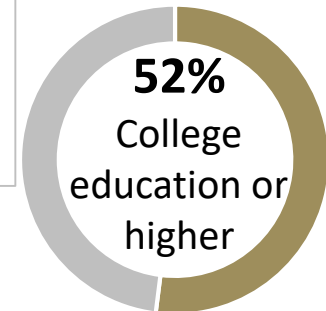
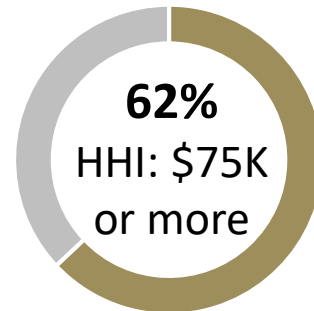


Key Demographics

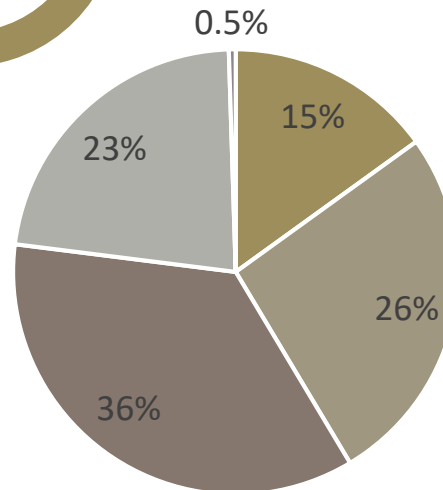


Of current hunters & target shooters who do not hunt small game but want to, most are male, middle-aged, affluent and/or educated. They are less likely to live in the Northeast.

Avg. Age: 54



Region



- Northeast
- Midwest
- South
- West
- Canada

MOVING HUNTERS INTO SMALL GAME HUNTING



What Do They Currently Hunt? (THOSE WHO WANT TO TRY SMALL GAME HUNTING)



83%

Deer



51%

Turkey



42%

Upland Game



29%

Waterfowl



26%

Predators



21%

Elk



14%

Bear



8%

Other Big
Game



3%

Wild pig



18%

Others

82% hunt with a traditional rifle and 83% hunt with a shotgun. Over half (55%) say their father took them on their first hunt and their first firearm was a shotgun. Nearly half (48%) started with small game hunting. Majority (91%) have tried at least one other species. For those that did, it took 2 – 5 years for 40% of them to try other shooting activities and only one season for 23% of them.

MOVING TARGET SHOOTERS TO SMALL GAME HUNTING



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



Plinking / Informal Target Shooting 90%

Sighting-in 81%

Sporting Clays with a Shotgun 45%

Pattern Shotgun 43%

Target Shooting with a Traditional
or Compound Bow 39%

Skeet with a Shotgun 38%

Trap with a Shotgun 38%

Teaching / Informative 32%

Long Range with a Traditional
Centerfire Rifle 30%

Benchrest with a Traditional
Centerfire Rifle 30%

Load Testing 29%

Over half (65%) of shooters say their father introduced them to the sport and only 11% were introduced by a friend. Majority started with plinking and then within two to five years, 35% tried a new activity and 29% branched out within a year. They have experience using a variety of firearms. Traditional rifles, handguns and shotguns are used for plinking / informal target shooting and over half are using a traditional centerfire rifle, 50% are using a traditional rimfire rifle and 43% are using a semi-automatic handgun for sighting-in.

PATHS TO SMALL GAME HUNTING

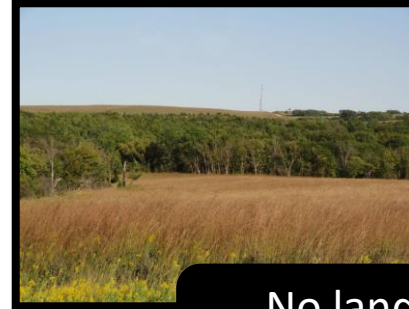


REASONS WHY THEY HAVEN'T TRIED SMALL GAME HUNTING



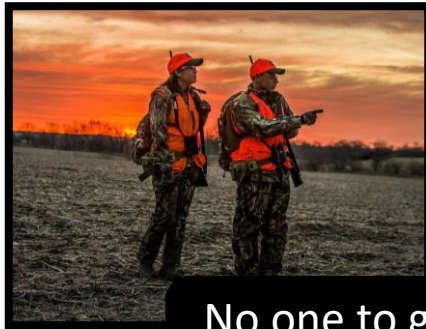
29% claim “there are other activities I’d rather do” and **21%** “do not have time.”

Not as important



24% say “no convenient place to hunt.”

No land available



23% reported “not having anyone to go with.”

No one to go with



12% say “they don’t know how to get started.”

Don’t know how

Lack of accessible hunting lands near them, time and not having anyone to go with are the biggest obstacles they face. Nearly one-third believe that small game hunting is not a top priority to do during their free time. However, if there were more convenient places to hunt and there were educational clinics along with organized hunting groups, that may encourage them to try.

HOW TO HELP THEM TRY SMALL GAME HUNTING



45%

“An invitation from a friend / family member”



36%

“Books / Magazines”



35%

“Program offered by a state wildlife agency”



30%

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



28%

“Join a local hunt club”



27%

“YouTube videos”



26%

“Program offered by an outdoor retailer”



17%

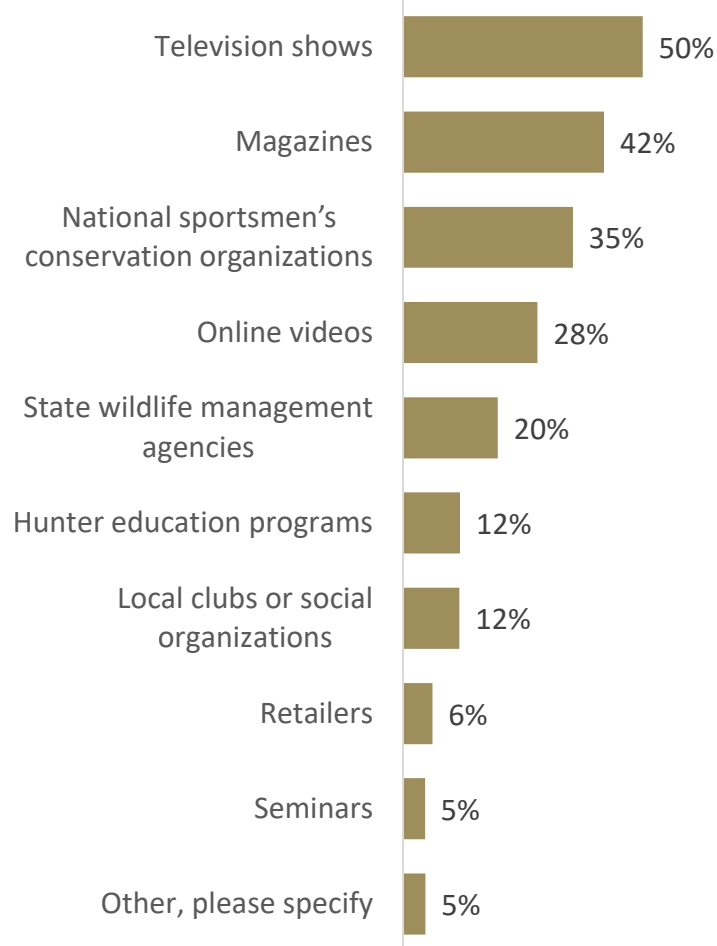
“Online forums / blogs”

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 editorial content (sharing hunting stories and how-to information) 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 or return to the sport.

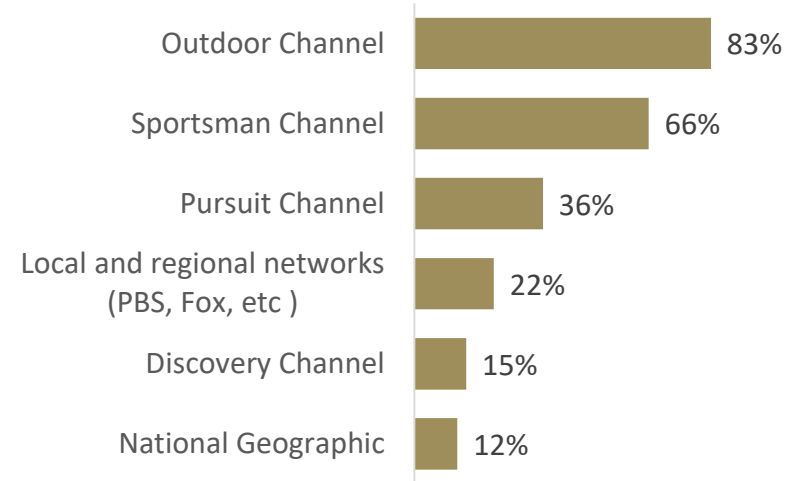
MOST INFLUENTIAL SOURCES FOR TRYING SMALL GAME HUNTING

These hunters and shooters can be reached and influenced primarily through television programs, articles and newsletters.

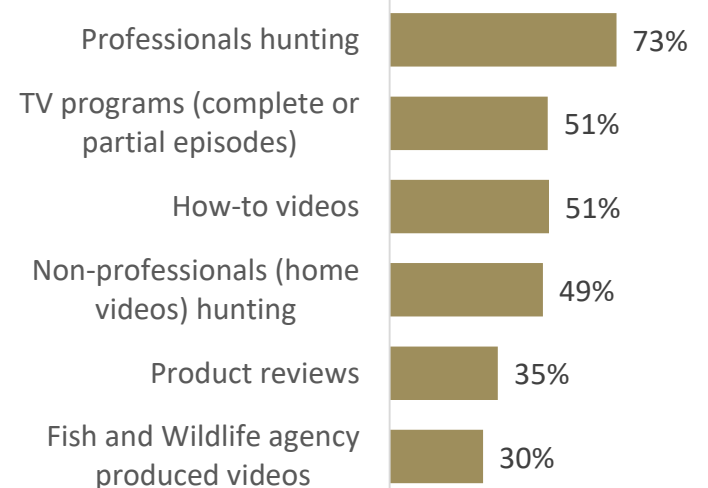
TOP SOURCES



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=892); Which type of online videos have you viewed with respect to influencing you to try different types of hunting? (N=249). What channel did you watch hunting and fishing programs on? (N=441).

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.

