



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.

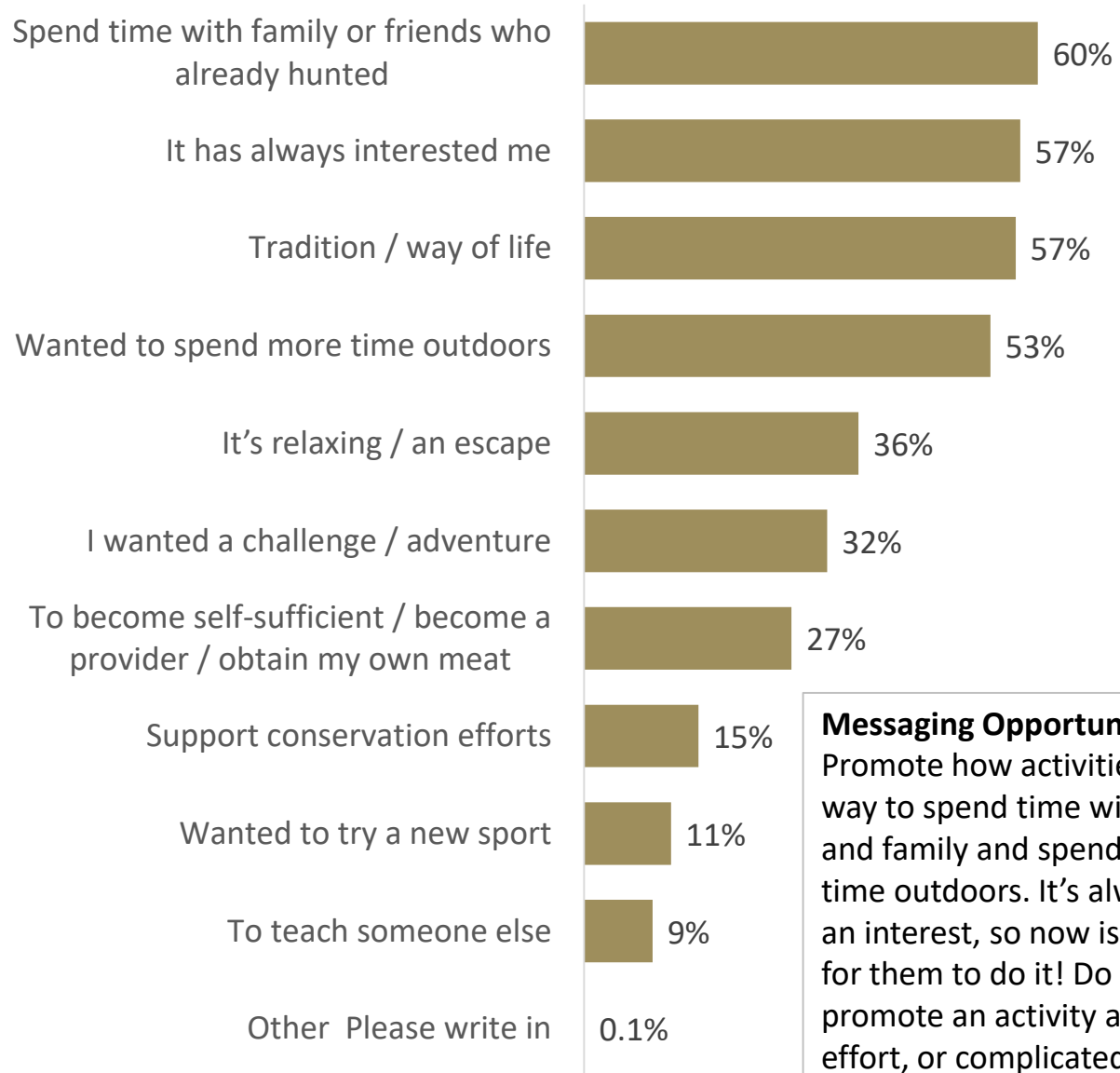
Introduction

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.

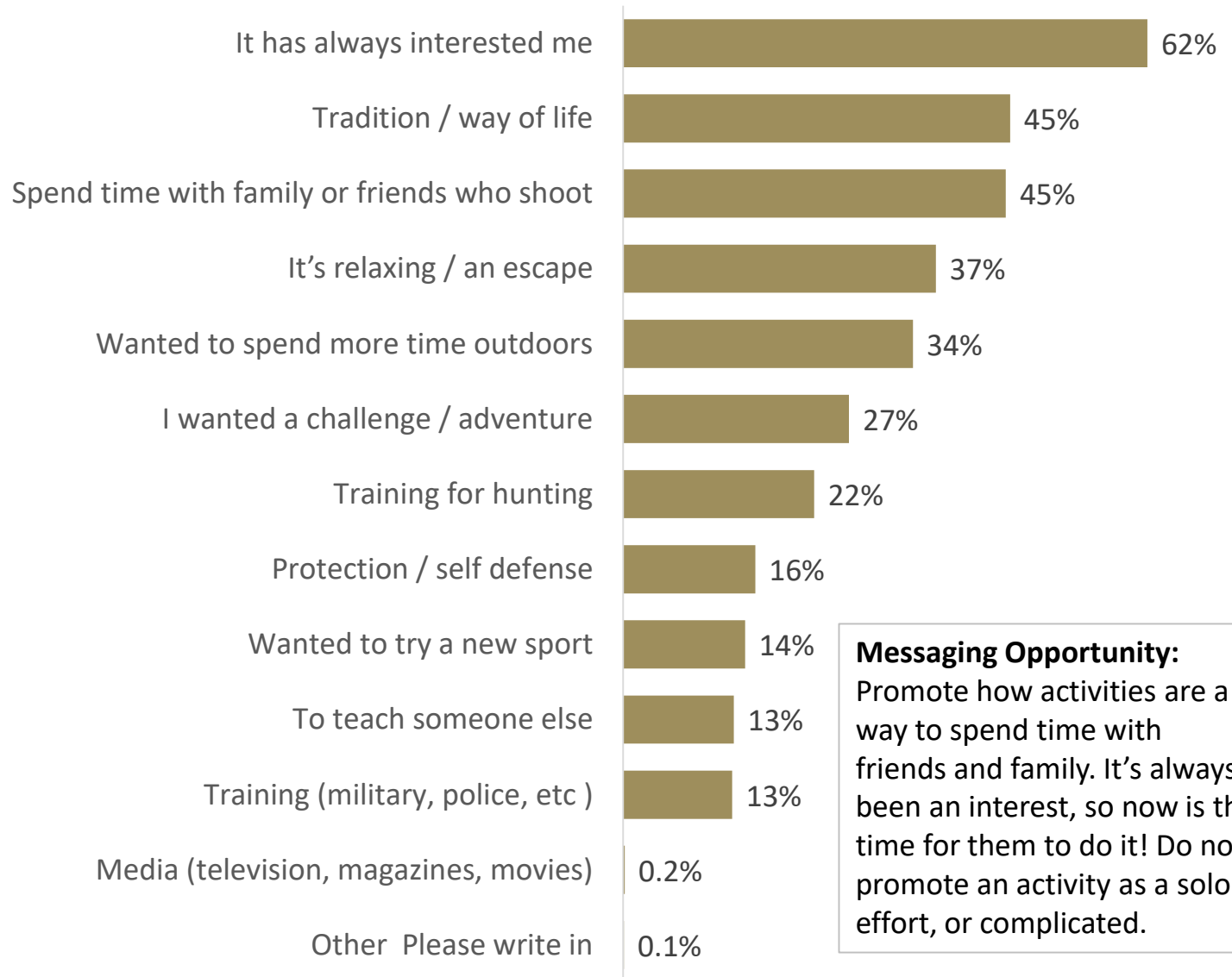
Thank you for your interest in helping advance hunting and shooting sports.

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)





Traditional or Compound Bow Target Shooting

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

OVERVIEW – Moving People Into Traditional or Compound Bow

Among those who are interested in the sport, there are a fair amount experienced with a traditional or compound bow. 57% of hunters are currently using a traditional or compound bow to hunt and 40% of target shooters have used one at the shooting range in the past three years.

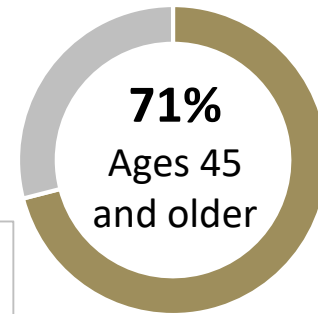
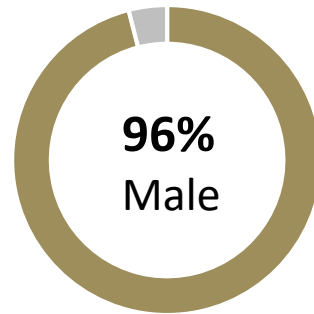
Both hunters and shooters are involved in different activities and are very much influenced by their friends. Over half of them took up another activity within five years of their first shooting / hunting experience. Although they desire to shoot bow, time and having access to a traditional or compound bow prevents them from getting involved. In addition, 17% say they don't know how to get started and 12% don't have anyone to go with.

Joining a local range, receiving an invitation from a friend and participating in an archery program that was offered by an outdoor retailer or state agency would be most helpful in trying out the sport. With not having access to a bow, having the ability to rent one or just try one out through an event or an educational program may inspire them to buy the equipment they need to get involved.

These hunters and shooters can be reached through multiple channels, primarily through television, magazines and online videos. They seek content on how to get started, stories / coverage of both professionals and non-professionals shooting a traditional or compound bow. This, in addition to word-of-mouth and promotional events, will make it easier for them to try archery.

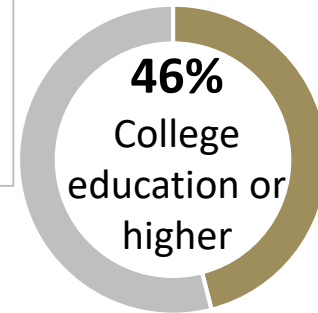
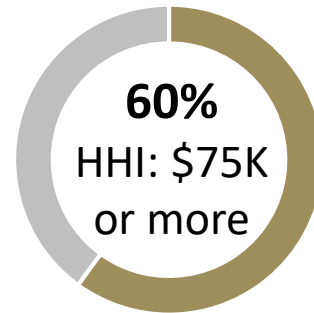


Key Demographics

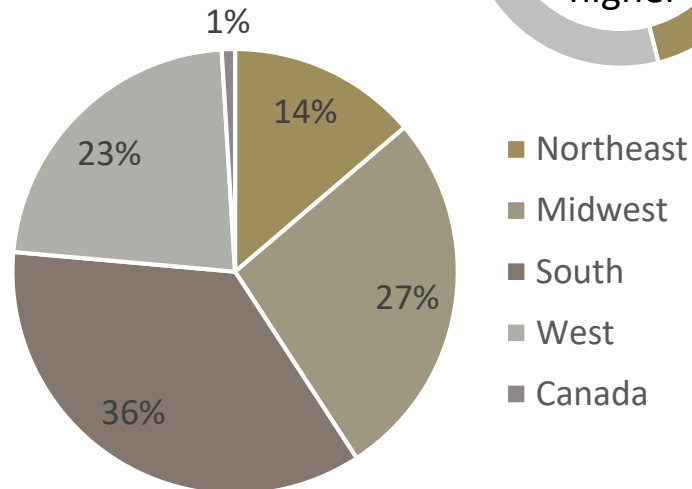


Of current hunters & target shooters who want to shoot a traditional or compound bow, most are male, middle-aged, affluent and/or educated. They are less likely to live in the Northeast.

Avg. Age: 52



Region



MOVING HUNTERS INTO TRADITIONAL OR COMPOUND BOW



What Do They Currently Hunt?

(THOSE WHO WANT TO TRY TRADITIONAL OR COMPOUND BOW)



89%

Deer



63%

Turkey



55%

Small Game



53%

Upland Game



42%

Predators



35%

Waterfowl



23%

Elk



22%

Wild Hog



18%

Bear



11%

Other Big
Game

Roughly 4% used either a traditional or compound bow on their first hunt and 57% are currently using either a traditional or compound bow to hunt. Two-thirds say their father introduced them and 51% of them went small game hunting. Only 4% haven't tried hunting other species. For those that did, it took between two to five years for 41% of them and only one season for 29% of them.

MOVING TARGET SHOOTERS TO TRADITIONAL OR COMPOUND BOW



What Types of Shooting They Currently Do? (THOSE WHO WANT TO TRY TRADITIONAL OR COMPOUND BOW)

Plinking / Informal Target Shooting 88%

Sighting-in 75%

Target Shooting with a Traditional
or Compound Bow 40%

Sporting Clays with a Shotgun 40%

Pattern Shotgun 38%

Teaching / Informative 34%

Trap with a Shotgun 33%

Skeet with a Shotgun 33%

Benchrest with a traditional
centerfire rifle 29%

Long range with a traditional
centerfire rifle 29%

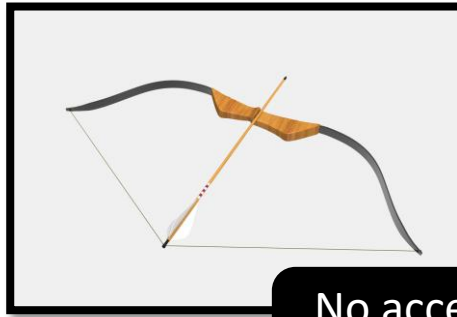


Two-thirds (64%) of shooters say their father introduced them to the sport and only 12% were introduced by a friend. Eighty percent started with plinking and then within two to five years, 32% of shooters tried a new activity and 27% branched out within a year. Less than one percent started off shooting with a compound or traditional bow, but 40% have gone target shooting with a traditional or compound bow in the past three years. Two thirds of them are more likely to shoot a traditional rifle or semi-automatic handgun.

PATHS TO TRADITIONAL OR COMPOUND BOW



REASONS WHY THEY HAVEN'T TRIED SHOOTING A TRADITIONAL OR COMPOUND BOW



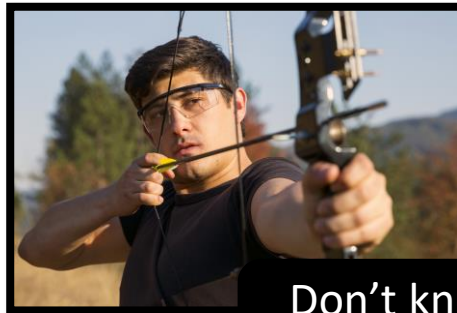
35% say “they don’t own or have access to equipment.”

No access to
a bow



21% say “there is not enough time.”

No time



17% say “they don’t know how to get started.”

Don’t know
how



12% reported “they don’t have anyone to go with.”

No one to go
with

Not having enough time or access to a traditional rimfire rifle are preventing hunters and target shooters from shooting one for the first time at a range. Not having access to a range that offers the activities they are interested in (long range, silhouette and steel challenge) and not having anyone to go with are also issues for some.

HOW TO HELP THEM TRY TRADITIONAL OR COMPOUND BOW



39%

“Join a local range”



37%

“An invitation from a friend / family member”



26%

“Program offered by an outdoor retailer”



26%

“Program offered by a state wildlife agency”



24%

“Books / Magazines”



23%

“YouTube videos”



20%

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



13%

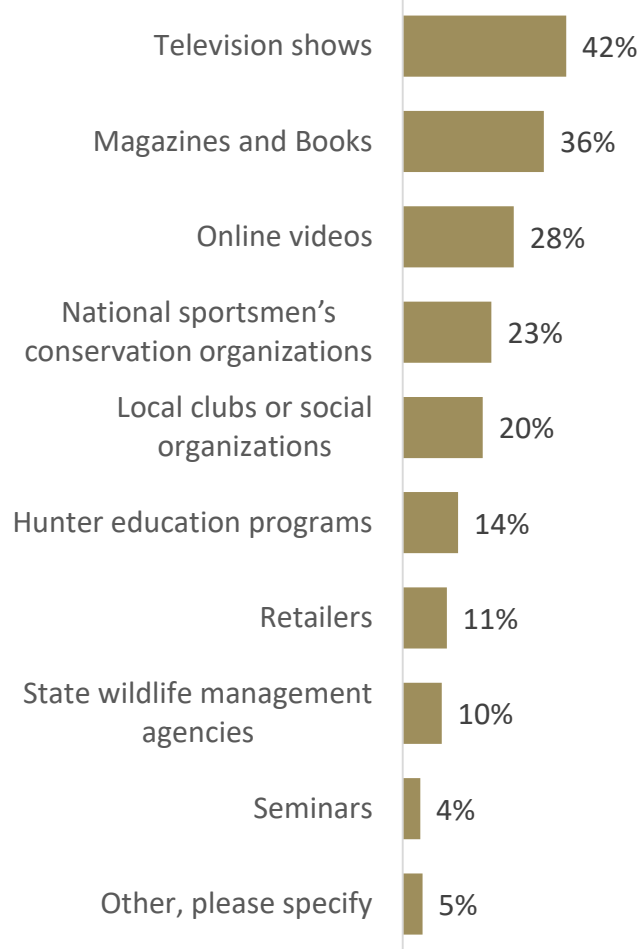
“Online forums / blogs”

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.

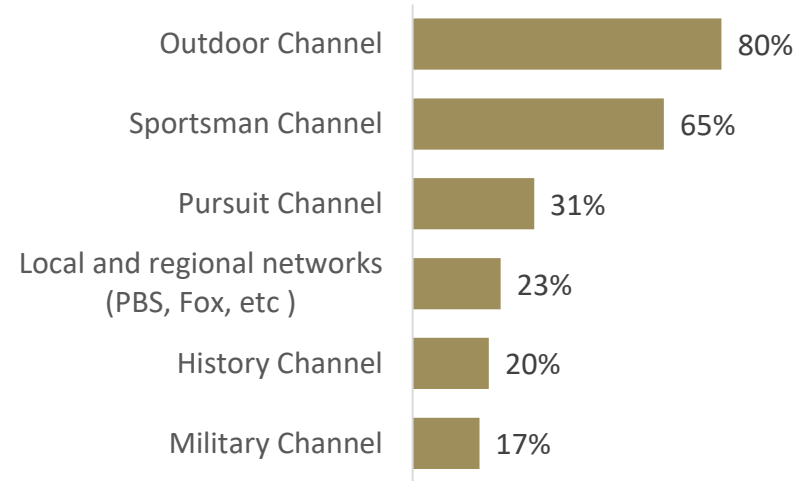
MOST INFLUENTIAL SOURCES FOR TRADITIONAL OR COMPOUND BOW

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=2,472); Which type of online videos have you viewed with respect to influencing you to try different types of shooting? (N=696). What channel did you watch shooting, hunting and fishing programs on? (N=1,019).

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.

