



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.

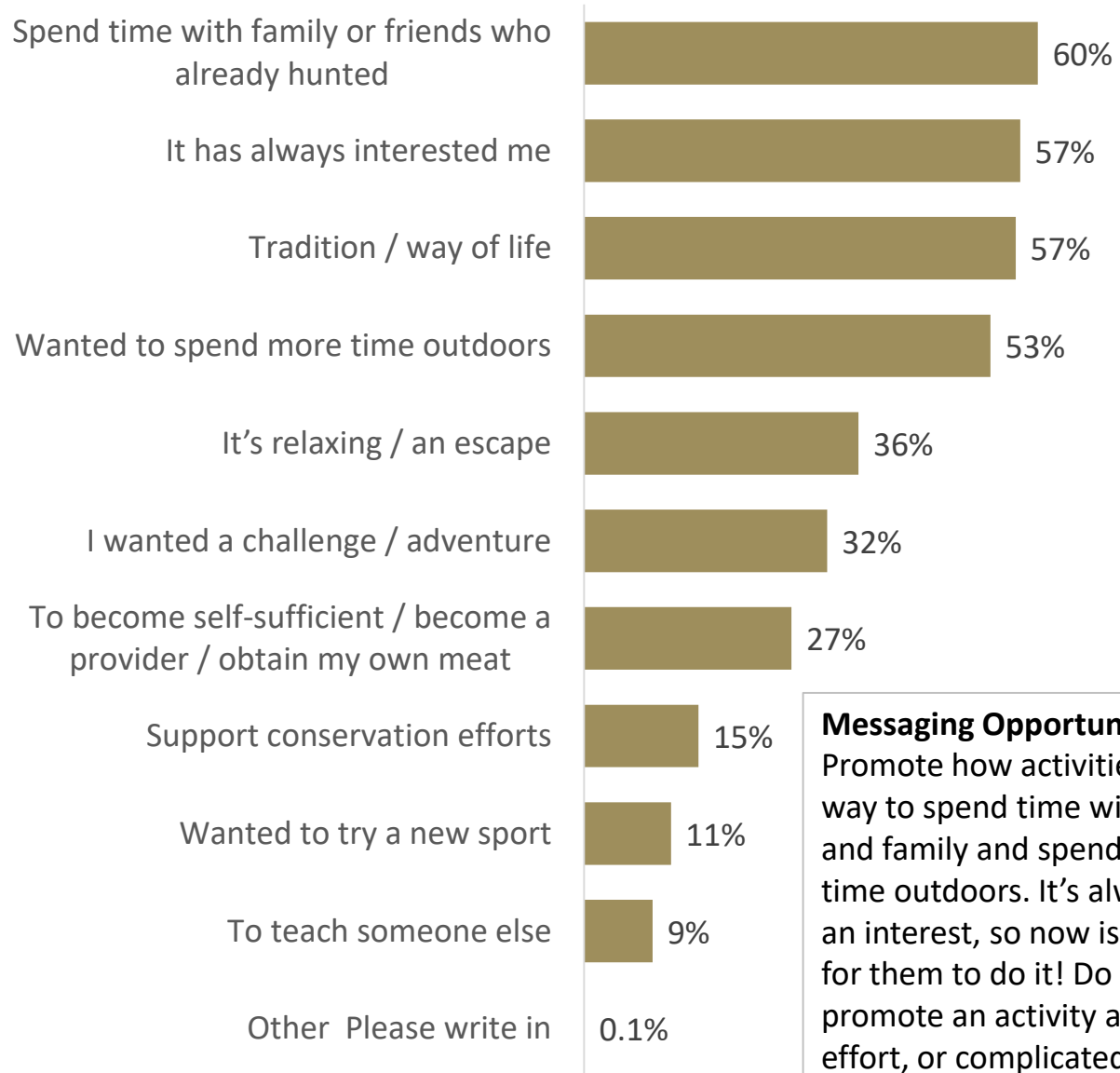
Introduction

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.

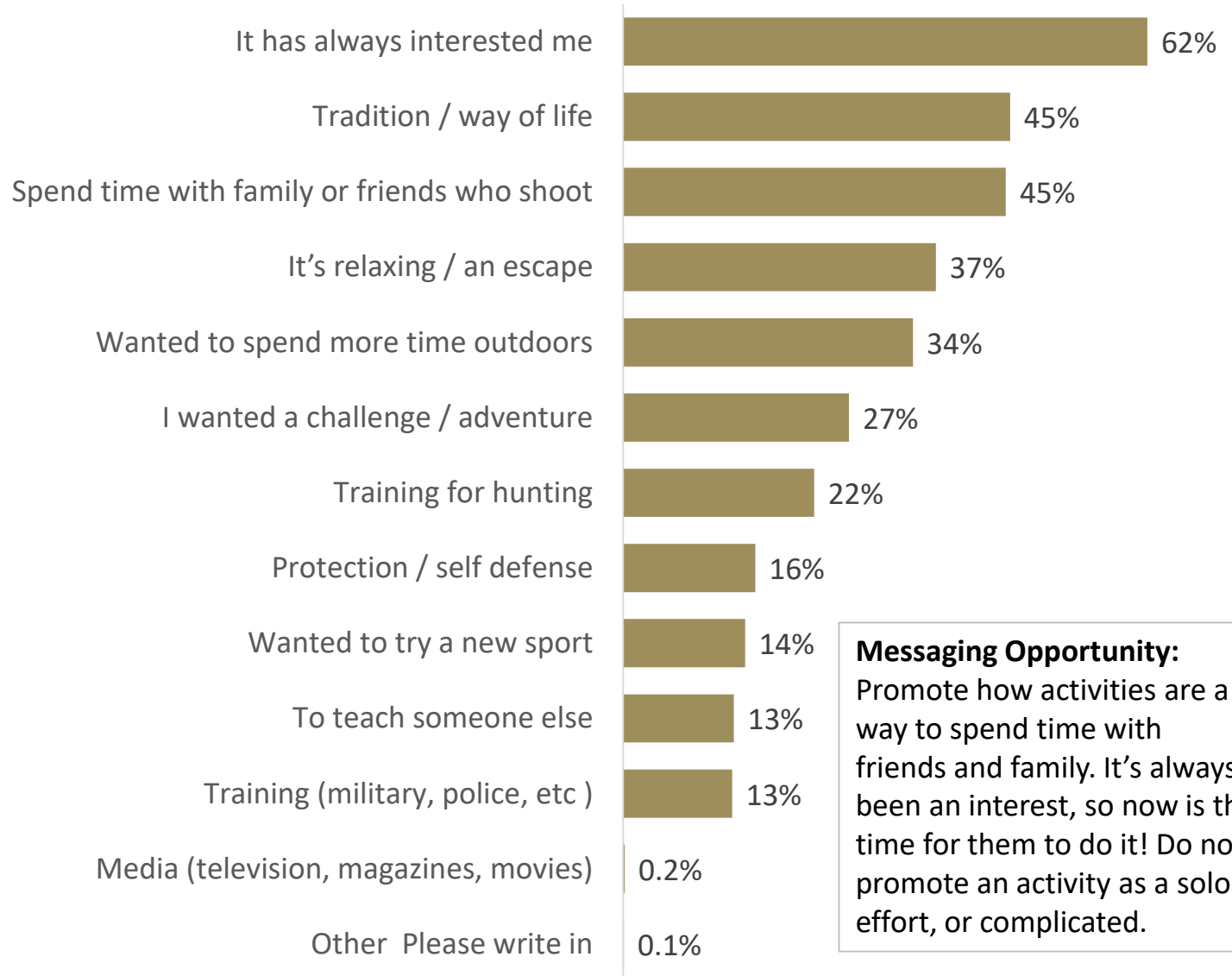
Thank you for your interest in helping advance hunting and shooting sports.

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)





Waterfowl Hunting

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

OVERVIEW – Moving People Into Waterfowl Hunting

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

Less than five percent has experience with this species. Over half of hunters said their father introduced them to small game hunting with a shotgun. 88% are currently using a shotgun to hunt different species including deer, turkey and small game.

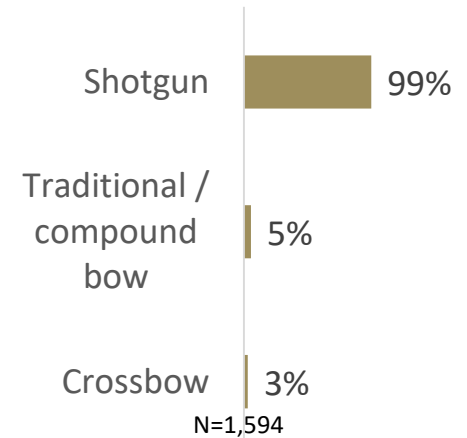
Target shooters also started out going to the range with their father and shooting with a shotgun. They are using different firearms, but roughly half (56%) are using a shotgun for plinking.

Their friends are the most influential in trying new activities, but 41% of them don't have anyone to go waterfowl hunting with. With the seasonal migration, many hunters and shooters are struggling with finding a convenient place to hunt this species. An opportunity is opening up more lands that are close-to-home or educating them on existing hunting areas.

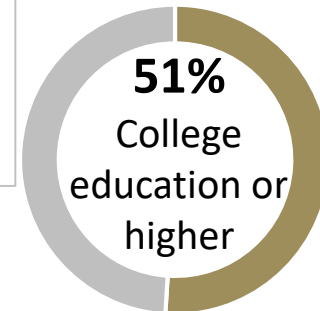
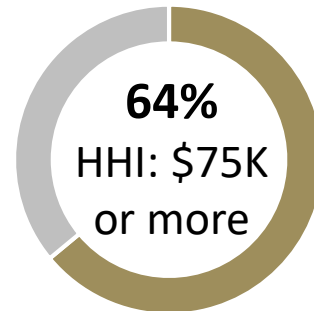
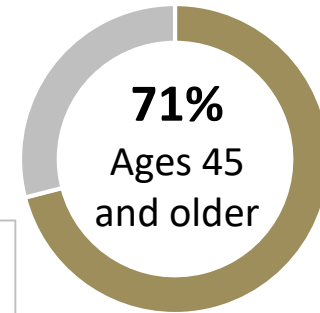
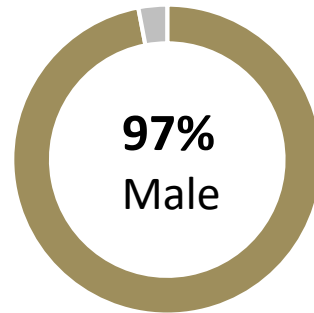
These hunters and shooters need a helping hand in getting started. Receiving an invitation or participating in some type of program held by a state agency, organization or a retailer may encourage them to try the sport. In addition, stories on professionals' and non-professionals' waterfowl hunts and promoting how-to information via television, magazines and newsletters may motivate them as well.



Desired Firearms to Hunt Waterfowl



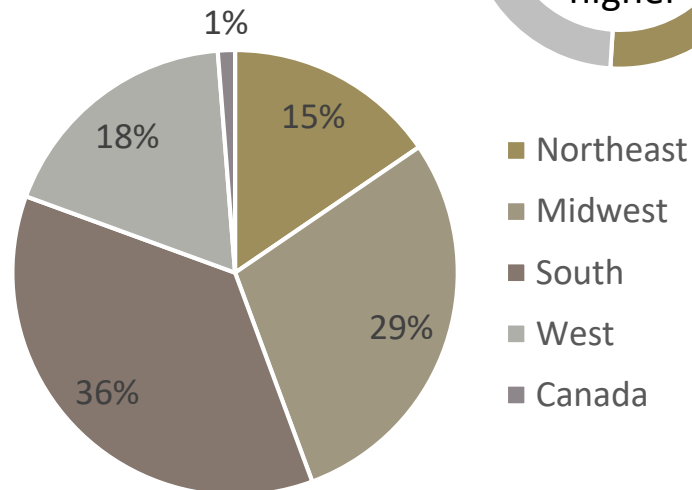
Key Demographics



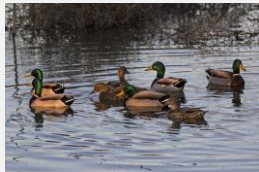
Of current hunters & target shooters who do not hunt waterfowl but want to, most are male, middle-aged, affluent and/or educated. They are more likely to live in the Midwest and the South.

Avg. Age: 52

Region



MOVING HUNTERS INTO WATERFOWL HUNTING



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



86%

Deer



59%

Turkey



53%

Small Game



48%

Upland Game



37%

Predators



17%

Elk



16%

Bear



8%

Other Big
Game



4%

Wild pig



21%

Others

86% hunt with a traditional rifle and 88% hunt with a shotgun. Over half (55%) say their father took them on their first hunt and 58% say their first firearm was a shotgun. Less than twenty percent were introduced to hunting by a friend. Half of them started with small game and five percent started with waterfowl. Majority (92%) have tried at least one other activity. For those that did, it took between two to five years for 39% of them to hunt another species and only one season for 28% of them.

MOVING TARGET SHOOTERS TO WATERFOWL HUNTING



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

Plinking / Informal Target Shooting 89%

Sighting-in 78%

Pattern Shotgun 48%

Sporting Clays with a Shotgun 45%

Trap with a Shotgun 39%

Target Shooting with a Traditional
or Compound Bow 39%

Skeet with a Shotgun 37%

Teaching / Informative 31%

Benchrest with a Traditional
Centerfire Rifle 31%

Long range with a traditional
centerfire rifle 30%

Load Testing 29%



Two-thirds (68%) of shooters say their father introduced them to the sport and only 11% were introduced by a friend. Eighty-two percent started with plinking and then within two to five years, 36% of shooters tried a new activity and 27% branched out within a year. They are using different firearms, but roughly half (56%) are using a shotgun for plinking and pattern shotgun is the third most popular activity.

Q: What shooting activities are you participating in now? Within the past three years. (N=1,246). Who took you shooting for the first time? (N=1,461). How long did you participate in your first shooting activity before trying something else? (N=1,419)

PATHS TO WATERFOWL HUNTING

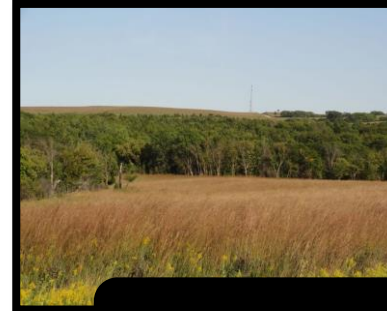


REASONS WHY THEY HAVEN'T TRIED WATERFOWL HUNTING



41% reported “not having anyone to go with.”

No one to go with



30% say “no convenient places to hunt” and **12%** indicated “no hunting land available.”

Not available



28% say “they don’t know how to get started” and **22%** “don’t own the proper equipment.”

Don’t know how



15% say “they need more training.”

Skills need improvement

These hunters and shooters are looking for assistance in how to get started, improving their hunting skills and getting connected with active waterfowl hunters that could take them along. Another opportunity is opening up more lands that are close-to-home or educating them on existing hunting areas.

HOW TO HELP THEM TRY WATERFOWL HUNTING



46%

“An invitation from a friend / family member”



37%

“Program offered by a state wildlife agency”



33%

“Books / Magazines”



30%

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



28%

“Join a local hunt club”



26%

“YouTube videos”



26%

“Program offered by an outdoor retailer”

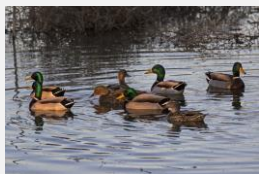


19%

“Online forums / blogs”

55% of hunters and 47% of shooters say “friends” are the greatest influence in trying new types of hunting and shooting activities. Educational how-to programs, as well as group waterfowl hunting events hosted by wildlife agencies and other organizations can teach them how to get involved. In addition, viral marketing efforts, including sharing stories and encouraging waterfowl hunters to introduce their colleagues and friends to the sport might help.

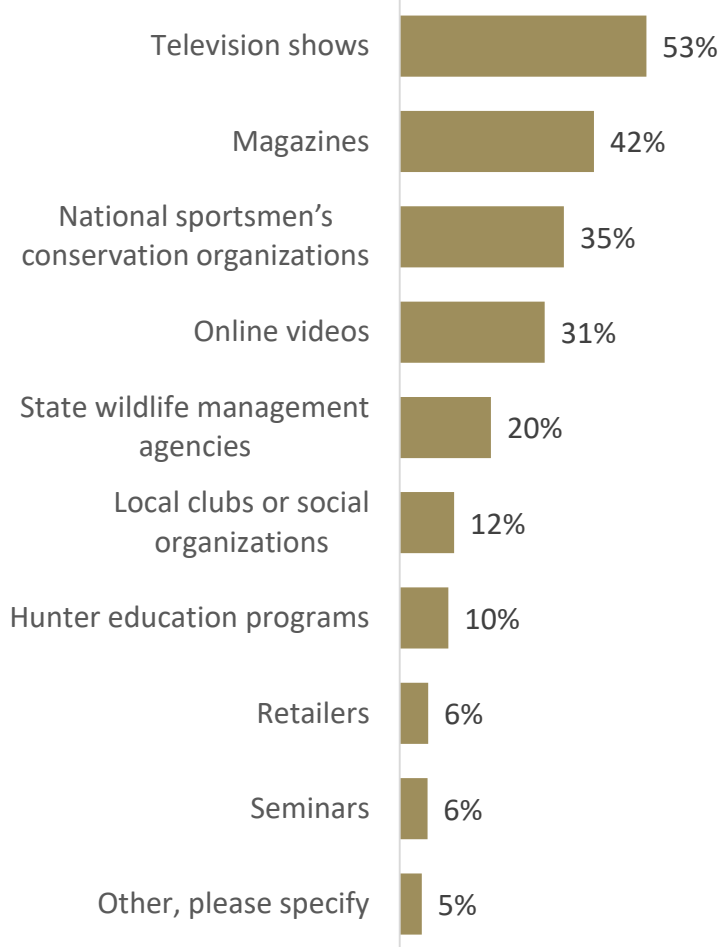
Q: What would help you get into the hunt that you are interested in? (N=1,415); When it comes to individuals, who has the greatest influence on you with regard to trying different species or trying new hunting methods? (N=1,449). When it comes to individuals, who has the greatest influence on you with regard to trying different types of shooting? (N=1,269).



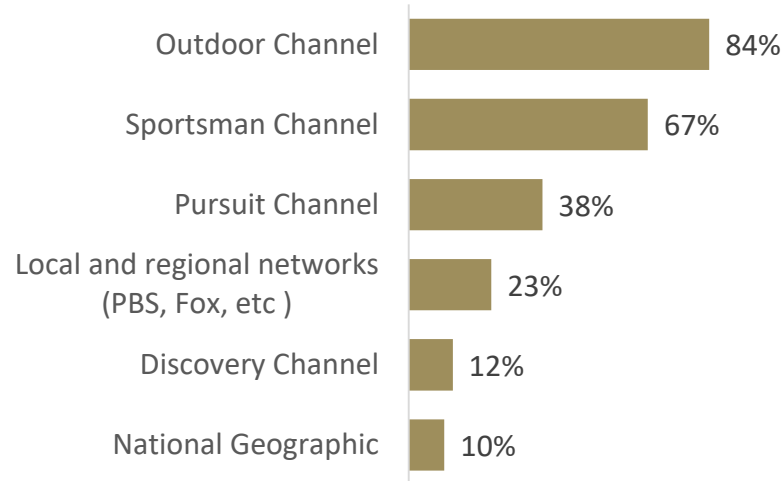
MOST INFLUENTIAL SOURCES FOR TRYING WATERFOWL HUNTING

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

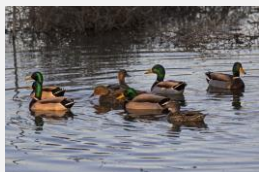
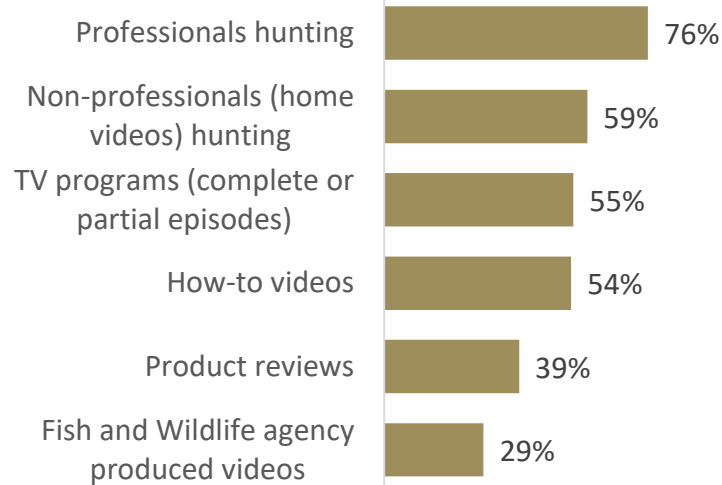
TOP SOURCES



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=1,443); Which type of online videos have you viewed with respect to influencing you to try different types of hunting? (N=447). What channel did you watch hunting and fishing programs on? (N=759).

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.

