



NSSF® REPORT 2018

CONCEALED CARRY MARKET

Prepared for NSSF by InfoManiacs, N. Riverside, IL



With assistance from:



THE FIREARMS INDUSTRY TRADE ASSOCIATION

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About NSSF®

The National Shooting Sports Foundation is the trade association for the firearms, ammunition, hunting and shooting sports industry. Its mission is to promote, protect and preserve hunting and the shooting sports. Formed in 1961, NSSF has a membership of more than 10,000 manufacturers, distributors, firearms retailers, shooting ranges, sportsmen's organizations, and publishers. For more information, log on to www.nssf.org

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Executive Summary

An objective of this study was to understand the behaviors, perceptions and attitudes of consumers with a conceal carry permit and of those who carry a firearm in states that do not offer a permit.

The study was conducted online utilizing a list of members, customers and non-members of the United States Concealed Carry Association (USCCA) and among members of A Girl and A Gun (AG&AG). A total of 4,521 respondents completed the questionnaire. Of the 4,521 completed interviews, 3,394 were members of the USCCA, 867 were non-members and 260 were members of AG&AG. Data collection took place late 2017 followed by analysis and a final report in 2018.

To participate in the study respondents must:

- Be 21 years or older
- Personally own at least one handgun
- Possess a valid concealed carry permit if resident of a state that requires one or if resident of a state that does not offer a permit
- Carry a handgun at least occasionally or rarely

It is important to consider the sample source when drawing conclusions from this report. The majority of the sample for this study came from an organization whose purpose is to provide training, education and information resources to individuals who are interested in self and home protection and particularly in the use of a firearm for this purpose. This suggests that a disproportionately large percentage of men in this sample are carrying more frequently than would otherwise be observed in the general population.

Since this study's primary focus is on concealed carry behaviors and attitudes and not intention to carry, respondents residing in states that do not require a permit must carry at least a minimal amount.

Results show that male respondents have owned firearms for significantly longer overall than female respondents. Over three-quarters (77.4%) of men have owned a firearm for over ten years while only 40.0% of women have owned a firearm for that length of time. A third (34.7%) of women are relatively new to firearms having owned a firearm for five years or less.

On average, participants in this study own 10.9 firearms although the average for men (11.2) is significantly higher than the average owned by women (7.8). A quarter (25.1%) of women own one or two firearms and 21.9% own three or four. The difference between men and women in terms of the number of firearms owned is likely due to a number of factors but clearly the short length of time a large proportion of women have owned firearms is a factor.

Nearly all respondents (98.1%) own at least one semiautomatic pistol. Long guns, both shotguns (73.1%) and traditional rifles (71.6%), are the second most popular firearms. Revolvers (61.4%) are a distant fourth in ownership. Respondents reported owning a total of 49,087 firearms, a third (33.8%) of which are semiautomatic pistols. After semiautomatic pistols, long guns, both traditional rifles (20.4%) and shotguns (16.9%) are owned in the largest quantities. Revolvers make up only 13.8% of the total firearms owned by respondents.

Nearly half of respondents (47.0%) carry all the time – either when they leave the home or both in and out of the home. Only 6.6% of respondents carry occasionally or rarely in non-permit states and 9.7% carry never/rarely/occasionally in permit states. Overall, men carry significantly more frequently than women. Almost half of men (48.0%) indicated they always carry a firearm while a little over a third (37.6%) of women always carry. Significantly more women carry only occasionally or rarely (13.6%) or not at all (6.6%) than men (8.3%).

Overall respondents are likely to maintain or increase their frequency of carrying a firearm in the next 12 months. The majority of respondents (70.4%) have not changed their frequency of carry over the past 12 months and do not anticipate changing their frequency of carry in the coming 12 months (69.3%). However, a little over a quarter of respondents (26.4%) indicated that their frequency of carry increased over the past 12 months and nearly a third (30.5%) intend to carry their firearm more frequently in the coming 12 months. The percentage of respondents who have decreased their frequency of carry over the past 12 months is a nominal 3.1% and only 0.2% say they will decrease their frequency of carry in the next 12 months.

The increase in frequency of carry is likely to be much higher for women than men in the next 12 months. Nearly three quarters of men have not changed their frequency of carry from the past 12 months (70.9%) and do not anticipate changing their frequency of carry in the next 12 months (70.4%). Women, on the other hand, continue to increase their carry frequency. Although two thirds of women (64.3%) indicated that their carry frequency remained constant over the past 12 months, nearly a third (31.4%) indicated their carry frequency increased. And, significantly more women (40.9%) indicated they anticipated carrying a firearm more frequently in the next 12 months than men.

On average, respondents first obtained their carry permit approximately 5.8 years ago (median = 3.5). A significant proportion of respondents are new to carry; a quarter (25.5%) first obtained a permit to carry a firearm less than two years ago and over half (56.1%) obtained a permit within the past five years. Slightly over a quarter (26.0%) of respondents obtained a permit ten or more years ago.

Women are newer to conceal carry than men. Nearly three-quarters (70.1%) of women obtained their conceal carry license in the past five years as compared to 54.4% of men.

Those from no-permit states have been carrying a firearm significantly longer (mean = 6.8 years), on average, than those from states requiring a permit to carry (mean = 6.1 years). Significantly more women (38.5%) started to carry a firearm in 2016 -17 than men (22.9%) and the majority of women (69.9%) started carrying within the past five years while half (50.1%) of men started carrying during the same span of time.

It is not surprising that defense, for both self and family, is the primary reason for obtaining a permit to carry. The overwhelming majority of respondents (80.5%) indicated self-defense was a reason for obtaining a permit. Two-thirds of respondents also indicated that safety for themselves and their family (69.3%) and being the family's first line of defense (69.2%) were also reasons for obtaining their permit. Nearly three quarters of respondents (70.6%) indicated that they obtained a permit because it was their second amendment right.

Significantly more women (85.5%) than men (79.9%) indicated that they felt safer knowing they could defend themselves. More women (24.0%) than men (19.2%) also indicated they wanted their permit in case they decided to carry. Men tended to be more concerned about acting as the first line of defense for both themselves and their family than women.

The 9mm is unquestionably preferred by both men and women although significantly more women (57.8%) prefer a 9mm than men (52.5%). However, going beyond the 9mm, women tend to prefer smaller calibers and men tend to prefer larger calibers. Significantly more women prefer .380 (17.1%) and 38 special (6.6%) as compared to men (7.0% and 2.2%, respectively). Men, on the other hand, prefer larger calibers like 45 ACP (16.2%) and 40 S&W (13.0%) relative to women (3.3% and 4.4%, respectively).

Over half (58.5%) of respondents always carry spare ammunition along with their firearm and 19.2% either rarely or never carry spare ammo. Men carry spare ammo significantly more frequently than women. Although half (49.6%) of women say they always carry spare ammo, a quarter (26.6%) rarely or

never carry spare ammo. Over half of men (58.8%) indicated they always carry spare ammo while only 18.4% rarely or never carry spare ammo.

Nearly three quarters (73.1%) of respondents carry a folding knife on a regular basis for defensive purposes making it by far the most frequently carried defense item aside from a firearm. Nearly half (44.5%) of respondents carry a flashlight. But one in five (17.5%) respondents do not carry any other items for defense.

Men are significantly more likely to carry additional items for self-defense than women. A quarter of women (26.6%) indicated they did not carry anything else for self-defense as compared to men (17.2%). Three quarters of men (74.3%) indicated they carry a folding knife while less than half of women (46.6%) carry one. Women tend to prefer defensive items that do not require close combat such as pepper spray (25.9%), impact weapons (13.8%), stun guns (5.7%) and Tasers (3.3%) as compared to men. Both men and women will carry a flashlight.

The more frequently respondents carry a firearm the more likely they are to carry other items for defense on a regular basis. Those who carry a firearm all the time or very frequently tend to carry other items. And significantly fewer respondents who report they rarely or never carry a firearm carry other items with regularity as compared to those who carry a firearm more frequently. Only 12.4% of respondents who always carry a firearm don't carry at least one other item. This is true for both men and women.

On average respondents own 4.4 carry holsters for either open or concealed carry. The largest proportion of respondents (28.6%) own six or more holsters. Men own significantly more holsters specifically for carry, on average 4.5, than women (3.4). It is not surprising that the more frequently respondents carry a firearm the more holsters they typically own and vice versa. Respondents who always carry a firearm own, on average, significantly more holsters for carry than those who carry less frequently.

Both men and women prefer to carry their firearm at the waist. Over half of men (58.5%) and a little less than half (42.2%) of women prefer to carry their firearm in-the-waistband. However, men and women diverge from here. A quarter of men (26.5%) prefer to carry a firearm outside-the-waistband while a third of women (31.0%) prefer to carry in a handbag.

The majority of respondents use defensive rounds when carrying although significantly more men (78.8%) use defensive rounds than women (65.3%). Significantly more women (14.7%) use standard handgun rounds when carrying a pistol for defense than men (6.6%).

Respondents, on average, purchased 1.1 firearms in the past 12 months for carry. Of those who purchased one or more firearms for carry in the past 12 months, respondents spent an average of \$902.10 (median = \$625.00). Slightly over half (54.2%) of respondents spent between \$300 and \$750 on firearms for carry. On average, men (\$905.80) and women (\$889.50) spent the nearly the same amount.

A little less than half of respondents (45.1%) intend to spend the same amount on firearms for carry in the next 12 months as they did in the past 12 months. More respondents intend to spend less on firearms for carry (30.7%) than intend to spend more (24.4%).

Respondents spent an average of \$513.50 (median = \$300.00) on handgun ammunition and/or handgun reloading supplies. On average, women spent significantly more on ammo and reloading supplies (\$621.80) than men (\$501.40).

By far, the most frequently purchased accessories for carry in the past 12 months were holsters. Two thirds (67.0%) of respondents purchased at least one holster. Magazines (50.0%) and belts (48.1%) were the second most frequently purchased carry accessories. A third of respondents purchased at least one

magazine carrier (33.6%) and outer-layer clothing (30.1%). Only 14.6% of respondents did not purchase any carry equipment or accessories in the past 12 months.

Respondents anticipate buying fewer accessories in the coming 12 months. Over a quarter (26.4%) of respondents indicate they have no plans to purchase equipment and accessories in the next 12 months. For those who plan to make purchases in the coming 12 months, holsters (36.3%), magazines (25.5%), magazine carriers (25.7%), belts (21.8%) and outer-layer clothing (21.4%) remain the most popular items.

Men and women have similar accessory buying habits although they diverge in some very obvious ways. Significantly more women purchased tactical bags (43.7%), under-layer clothing (19.8%) and concealed carry handbags (40.7%) than men (26.9%, 10.1%, and 4.8% respectively). A small percentage of men (6.8%) purchased concealed carry briefcases, significantly more than women (4.0%).

On average, women (\$273.02) spent significantly more on accessories in the past 12 months than men (\$245.15). Half of respondents (50.6%) anticipate spending the same amount on carry accessories in the next 12 months as they did in the past 12 months. A third (30.7%) expect to spend less on accessories and less than one in five (18.8%) anticipate spending more in the next 12 months. The trend in anticipated spend on accessories in the next 12 months is the same for men and women.

As one might expect there is a relationship between the frequency people carry a handgun and spend in the past 12 months on handguns, ammunition and carry equipment and accessories. This holds for both men and women although the relationship is much more pronounced among men. This may be a function of the differences in sample size since spend does increase systematically for women as well as men.

Over half (60.4%) of respondents initiated the purchase of firearms specifically for carry from a local firearms shop and over a third (38.8%) purchased firearms from an outdoor specialty store. Retailer purchasing patterns differ considerably for ammunition as compared to firearms. Respondents purchased ammunition from a wider range of retailers. The majority of ammunition purchases took place at either outdoor specialty stores (59.2%) or mass merchants (50.7%). Respondents also purchased ammunition from local firearms shops (45.3%), online-only retailers (38.4%) and to a lesser extent, shooting ranges (24.9%).

Approximately a third (31.5%) of respondents purchased firearms and slightly less than half (47.9%) purchased ammunition online. By far, the two most popular online retailers for purchasing firearms are Gunbroker.com (31.0%) and Cabelas.com (21.1%). Respondents buy ammunition from a number of different online retailers including Cheaperthandirt.com (35.8%), Midwayusa.com (33.4%), Cabelas.com (32.7%), Walmart.com (22.8%) and Sportsman's Guide (20.5%).

More men (32.5%) initiate the purchase of firearms online than women (23.1%) and more men (48.7%) than women (41.7%) also buy ammunition online. Men and women tend to shop at the same online retailers for firearms but diverge significantly when buying ammunition. More men purchase ammunition from Cabelas.com, Cheaperthandirt.com, Sportsman's Guide and CDNN than women. Women tend to prefer lesser known online retailers.

Over half (52.4%) of respondents purchase their carry accessories at local firearms shops and slightly less than half (48.1%) purchase their accessories at outdoor specialty stores. Significantly more men (57.3%) purchase carry accessories online than women (45.4%) and more women (23.3%) will purchase accessories at a shooting range than men (14.8%).

Nearly all respondents consult one or more resources to obtain information pertaining to carry equipment and accessories. Women tend to favor a more personal touch through firearms shop

personnel (53.8%), friends (53.6%) and family (34.3%) while men prefer magazines and periodicals (72.6%) and manufacturers websites (60.5%).

On average, respondents took a total of 12.9 (median = 6) training classes or sessions. The most popular classes overall are basic handgun usage and maintenance, range safety instruction, and dry fire training.

Women have had significantly more classes/sessions on average (mean = 14.1, median = 9.0) than men (mean = 12.7, median = 6.0). Women took significantly more basic handgun usage and maintenance classes (3.3) and practical pistol training (2.5) than men (2.4 and 1.8, respectively).

There is a correlation between the frequency someone carries a firearm and the amount of training they have had. The more frequently someone carries a firearm the more training they tend to have. This is a very strong trend among men but less so among women. Women tend to seek out training and it does not appear to be necessarily a function of their desire to carry a firearm.

The more classes someone takes, the more they tend to spend on handguns, ammunition and equipment and accessories. Clearly, spend on handguns increases steadily with an increase in the number of classes individuals take. However, spend on ammunition and accessories appears to plateau at 20 classes.

Women are more interested in continued handgun training than men across the board for nearly all of the different handgun activities. Nearly three-quarters (71.2%) of women indicated they intended to take some form of training in the next six months. In contrast, half of men (49.0%) indicated they had no plans to take handgun training in the next six months. Over half of women (53.0%) intend to defensive pistol training and a third (37.8%) intend to take practical pistol training.

Respondents were asked to react to 17 statements to evaluate their attitudes and opinions on several relevant topics by indicating their level of agreement or disagreement with each statement.¹ The statement ratings were then statistically analyzed to develop groupings representing similar concepts. A total of six multi-item concepts (factors) were identified along with four statements that did not combine with others representing individual concepts. A factor mean score is created by summing across the individual responses on each statement and creating an average. The factor mean indicates respondent's level of agreement on each concept as a whole. The factors are listed here by factor mean score (highest to lowest).

Protection (Factor Mean = 4.57) - The vast majority of respondents feel very strongly that it is their responsibility to protect themselves and their family. Overwhelmingly respondents indicated that concern for the safety and security of themselves and their family was always top of mind.

Both men and women feel very strongly about protecting themselves and their family but men feel significantly more strongly about protection than women. This is not at all surprising. Women are taking steps to be self-sufficient in their ability to defend themselves and their families but it is instilled in men from an early age that men are primarily responsible for protecting their families and assuring their safety and well-being.

Training and Preparation (Factor Mean = 4.40) - Respondents feel very strongly that training and preparation is important for defense. In particular, 84.3% of respondents felt that defensive pistol training was very important in being prepared to defend one's family and self.

¹ A 5-point Likert-type scale was used to ascertain agreement with statements. The scale points were 1 = Strongly Disagree, 2 = Disagree, 3 = Neither Agree or Disagree, 4 = Agree, and 5 = Strongly Agree. The Top-2 Box Percentage refers to the percentage of respondents who agree or strongly agree with a statement. The center is represented by respondents who indicated they neither agree nor disagree with a statement. The Bottom-2 Box Percentage is the percentage of respondents who disagree or strongly disagree with a statement.

Although both men and women feel strongly that training and preparation are essential, women feel more strongly than men about this. This is highly consistent with earlier findings. On average, Women have had more training than men and will continue to pursue training whereas men will stop pursuing training much sooner.

Vigilant (Factor Mean = 3.97) - The overwhelming majority of respondents (81.2%) indicated that they always have a loaded firearm nearby but less than two thirds (61.6%) indicated that they “don’t feel right” without their firearm. Although respondents seem to feel more secure with a loaded firearm somewhere within reach, they are not necessarily willing to carry a firearm all the time. This appears to be consistent with earlier findings regarding respondents’ frequency of carry. Men feel considerably more strongly than women regarding the need for vigilance.

Proficiency (Factor Mean = 3.84) - The majority of study participants are confident in their knowledge and skill with firearms. Two thirds (66.8%) of respondents feel confident in their proficiency with handguns and 70.8% feel confident in their knowledge of firearms in general.

Men feel significantly more proficient in their knowledge and use of handguns than women. This is not surprising and provides some explanation for the differences in the amount and pursuit of training between men and women. Men are more confident in their knowledge and ability to use handguns than women. Women compensate for their perceived lack of handgun proficiency by continually training. Men, on the other hand, are more confident in their proficiency and do not feel the need to seek additional training.

Concerned (Factor Mean = 3.40) - Clearly, respondents are concerned about the implications of using a firearm in a defensive situation. Over three quarters (78.7%) of respondents indicated that they were very concerned. Less than half (47.0%) indicated they were not worried about using their firearm in an emergency although slightly less than a third (31.1%) indicated they were worried. This is not surprising since USCCA membership benefits include coverage for legal and other expenses should it be necessary to use your firearm in a defensive situation. Given that the majority of respondents in this study are USCCA members it follows that they are concerned about the aftermath of a situation that includes the discharge of their firearm.

Gun Rights (Factor Mean = 2.17) - It appears that the 2016 election has not alleviated the anxiety of many gun owners regarding gun rights or the ability to buy firearms. Nearly two thirds (60.5%) of respondents indicated that they remain worried about their ability to purchase firearms although the election was favorable for firearms policy. And nearly three quarters (73.5%) of respondents remain worried about their second amendment rights.

Conclusions and Implications

As conceal carry laws continue to ease across the country, it is anticipated that the number of permit holders will continue to increase. As the ranks increase so will the need for carry-friendly handguns, ammunition and carry equipment and accessories. It's difficult to project actual growth in number of permit holders however it is safe to say that among those who currently have a permit and those who carry in states that don't offer or require a permit, carry frequency is likely to increase.

The greatest increase in carry frequency is likely to come from women and younger individuals (ages 21 to 34).

Over two thirds of men (70.9%) indicated they did not increase their frequency of carry in the past 12 months and nearly the same percentage (70.4%) do not intend to increase their frequency of carry in the coming 12 months. Only a quarter (26.0%) of men indicated they increased their frequency of carry in the past 12 months and 29.4% intend to increase their frequency of carry in the next 12 months. But 31.4% of women indicated they increased their frequency of carry in the past 12 months and 40.9% indicate they will increase their frequency of carry in the coming 12 months. Over a third (35.7%) of the youngest participants indicated that they intend to increase their frequency of carry in the next 12 months.

It is important to consider the sample source when drawing conclusions. The majority of the sample for this study came from an organization whose purpose is to provide training, education and information resources to individuals who are interested in self and home protection and particularly in the use of a firearm for this purpose. This suggests that a disproportionately large percentage of men in this sample are carrying more frequently than would otherwise be observed in the general population. In other words, it is difficult to project how much the frequency of carry will change among men in the general population. It is also important to point out that three quarters (76.9%) of the men in this sample are already carrying a firearm "always" or "most of the time". It would be difficult to obtain much more growth in frequency of carry from this sample of men.

Nonetheless, we are still likely to see greater growth among women. The sample of women came from both the USCCA and A Girl and A Gun, an organization whose mission is to encourage women to be proficient in the use of firearms both for defense and sport. It is, therefore, believable that the frequency of carry is likely to increase significantly more for women than men. Women, on average, have obtained their permit more recently, have been carrying for a shorter period of time, and carry less frequently than men. There is considerable room for growth among women, particularly in terms of increasing their frequency of carry.

The greater growth in carry frequency among women suggests that the firearms industry needs to pay close attention to their needs and desires for firearms and carry equipment and accessories.

The more frequently a person carries a firearm the more they spend on handguns, ammunition and carry equipment and accessories.

Frequency of carry is important for three reasons:

1. The more frequently someone carries a handgun the more they tend to spend on carry handguns, ammunition and accessories. This trend is very strong and held across all categories and for both men and women.
2. The more frequently someone carries a handgun the more they tend to carry other items for defense. This translates into greater spend on ancillary products such as folding knives, flashlights, tactical pens and OC/Pepper Spray.

3. The more frequently someone carries a handgun, the more training they tend to have taken. And, likewise, there is a strong relationship between the amount of training someone has had and the amount they spend on firearms, ammunition and accessories.

These three relationships are correlational and not causal – we cannot state that one behavior causes another. However, the relationships are strong suggesting that influencing the frequency of carry can potentially influence spend.

It may not be easy to influence someone's frequency of carry. There is evidence that willingness to carry a firearm and the frequency with which you do so is a mindset. Evidence for this mindset comes indirectly by observing whether individuals carry items other than a sidearm for defensive purposes. It was observed that the more frequently someone carries a firearm the more likely they are to carry other items for defense. Alternatively, those who carry occasionally, rarely or not at all also don't tend to carry other items for defense.

The one activity that may influence frequency of carry is training. Encouraging training can potentially result in both increased frequency of carry and spend. Training is a positive activity in that it promotes proficiency, preparation and serves to boost confidence, particularly among women.

The preferred caliber of handgun for both men and women is a 9mm.

Half of men (52.5%) and 57.8% of women indicate their favorite caliber is a 9mm. Men who prefer another caliber tend to go larger, either a 45 ACP or 40 S&W. Women who don't prefer a 9mm tend to go smaller, either a .380 ACP or 38 Special.

Firearms retailers need to consider this when recommending firearms for conceal carry especially if the individual is new to firearms. There are advantages to recommending 9 mm firearms over larger and smaller calibers. A semiautomatic handgun with a 3" or 4" barrel in a 9mm is small enough to carry but large enough to reduce recoil. 9mm are reasonably accurate at a distance so that new shooters can learn and master shooting basics. They are also fun to shoot. New shooters who learn to shoot with a comfortable firearm are likely to master the basics more quickly and enjoy themselves in the process. The more they enjoy themselves the more likely they are to practice more frequently, take training, and move into other shooting activities.

Both large and small caliber handguns in a size small enough to carry have serious drawbacks. Larger caliber handguns in a size small enough to carry have considerable recoil and may be difficult to control for inexperienced shooters and even some experienced ones. Smaller caliber handguns in a carry size are meant for use in close combat situations and are not accurate beyond a few feet. Small sized small caliber pistols are, therefore, not very good for learning the basics and target practice. Nothing will discourage a new shooter more than not being able to hit the target.

Men and women have different styles of carry.

The vast majority of men (85.0%) prefer to carry their firearm at the waist. Over half (58.5%) prefer to carry in-the-waistband and 26.5% prefer to carry outside-the-waistband. A little over half of women prefer to carry at the waist with 42.2% preferring in-the-waistband versus outside-the-waistband (14.9%). A third of women (31.0%) prefer a conceal carry bag, mostly a handbag. Nearly half (40.7%) of women indicated they bought at least one handbag for conceal carry in the past 12 months and 15.6% of women indicate they intend to purchase a handbag in the next 12 months.

Women are purchasing under layer clothing such as corsets, underwear and bras that are specially designed to hide a firearm without showing through their regular clothing. 19.8% of women indicated they made at least one purchased in this category in the past 12 months and 15.2% indicate they intend to purchase clothing in this category in the coming 12 months.

As long as the number of women who obtain carry permits continues to increase so will demand for conceal carry handbags and undergarments.

Women spent more on ammunition and carry equipment and accessories than men in the past 12 months and spent the same amount as men on firearms.

On average, women spent significantly more than men on ammunition and reloading supplies and carry equipment and accessories in the past 12 months and were on parity with men for the number of firearms purchased for carry and the amount spent. It has been shown in past studies that men nearly always outspend women on firearms, ammunition and accessories. This is the case because men have been more active in hunting and other firearms activities, value firearms more and often have more discretionary income than women.

Women may be spending more for carry because they are newer to conceal carry than a large proportion of men and are buying the necessary firearms and supporting equipment and accessories so they can carry comfortably. Many of the women in this sample are also active members of A Girl and A Gun and tend to train and practice more frequently than men and this means they are buying more ammunition.

Nearly all participants (97%) research conceal carry equipment and accessories but women tend to prefer a more personal touch than men.

Nearly everyone does their homework when considering the purchase of equipment accessories for conceal carry. But men consult magazines and periodicals and manufacturers websites significantly more frequently than women. Women will consult these sources but they prefer to talk with people including firearms shop personnel, friends and family members. This gives retailers the opportunity to guide women's purchase decisions directly.

Women take more training than men and they tend to take their training in a group setting more frequently than men.

On average, women took significantly more training than men, particularly basic handgun usage and maintenance and practical pistol training. The attitudinal measures suggest that women are less secure in their handgun knowledge and proficiency and may be compensating by taking more training.

Women also took the majority of their training in a group setting. There may be many reasons why the majority of women take their training in a group setting but the social setting may provide a support structure that women find boosts their confidence.

Introduction

The ranks of concealed carry permit holders has increased continually over the past several years and continues to exhibit strong growth. According to a study published in 2017, it is estimated that 9 million people carry loaded handguns at least once per month and, of those, 3 million carry on a daily basis.²

Since the Firearm Concealed Carry Act became state law in Illinois (July 9, 2013) all 50 states permit some form of carry and several states have passed laws that make obtaining permits less restrictive. Prior to 2003, Vermont was the only state that allowed individuals to carry a concealed handgun without a permit. Since then, 12 other states now allow residents to carry a firearm without a permit. The increase in the number of permit holders has been stunning – from 2.7 million in 1999 to 14.5 million in 2016 and this amount does not include individuals in states that do not require a permit.³

Exhibiting such explosive growth, it is no surprise that the firearms industry is very interested in the behaviors, both in terms of carry and purchasing, and the attitudes and perceptions of permit holders. For this reason, the NSSF would like to provide information to the industry that will shed light on this segment of firearms owners to help the industry meet their ever growing needs and desires.



² Rowhani-Rahbar A, Azrael D, Lyons VH, Simonetti JA, Miller M, Loaded Handgun Carrying Among US Adults 2015, Am J Public Health, 2017 Dec; 107(12); 1930-1936.

³ Ibid.

Study Objectives

A main objective of this study is to gain an understanding of the behaviors, perceptions and attitudes of consumers with concealed carry permits in states that require a permit and those who carry in states that don't require a permit. Specific objectives are to determine:

- Concealed carry behaviors including:
 - The frequency of carry, if at all, and the reasons behind the choice to carry or not to carry.
 - The types of firearms carried, where firearms are carried and the equipment used for carry.
- Perceptions of the concealed carry permit process (e.g., expense, time, training, value).
- Purchase behaviors for concealed carry firearms and equipment
- What prompted the desire to obtain a permit and carry
- Perceived familiarity with state and local concealed carry laws
- The types and amount of handgun training and training specific to concealed carry
- Comfort-level with concealed carry
- Attitudes towards concealed carry
- Differences in behaviors and attitudes between various demographic segments (e.g., sex, age, geographic region)

Methodology

NSSF's concealed carry study was conducted in cooperation with the United States Concealed Carry Association (USCCA).

The populations of interest for this study are firearms owners who:

- Have a current valid concealed carry permit
- Carry at least occasionally if living in a state that does not require a permit to own or carry a firearm.

To participate in the study respondents must:

- Be 21 years or older
- Personally own at least one handgun
- Possess a valid concealed carry permit if resident of a state that requires one or if resident of a state that does not offer a permit
- Carry a handgun at least occasionally or rarely

Since this study is focused on concealed carry attitudes and behaviors and not intention to carry, it was determined that respondents who came from states that do not require or issue permits to carry must carry at least occasionally or rarely to qualify to participate in this study.

The research was conducted online utilizing a list provided by the USCCA of members, customers and non-members. USCCA members pay an amount annually to obtain education, training and coverage for legal expenses that may be incurred if it is necessary to use a firearm in self-defense. USCCA customers are individuals who have purchased education, training or other products or services from the USCCA but are not members. Non-members are individuals who have expressed interest, made inquiries or have otherwise made contact with the USCCA but are not a member or customer of the USCCA. For purposes of this study, customers and non-members were combined into a single group of non-members.

A total of 1,131,497 individuals were invited to participate in the study. The invitation was in the form of a personal email from the USCCA signed by Tim Schmidt, President of the USCCA. The invitation revealed the sponsor of the study as the NSSF. As an incentive to participate in the study respondents who completed the questionnaire were given the opportunity to enter into a drawing for a \$500 Cabela's gift card. The questionnaire was fielded in late 2017.

After data collection was completed, it was determined that women were under-represented in the USCCA sample. Of the 4,258 completed interviews only 196 (4.6%) were women. Based on data obtained from the study *Women Gun Owners, Purchasing, Perceptions and Participation, August 2014*, 48.2% of women indicated that home and self-protection were the most important reasons to own a firearm. Nearly half (42.2%) currently held a concealed carry permit and another 29.4% intended to obtain a permit within the next 12 months. Clearly it was important for this study to include a larger sample of women. We reached out to Robyn Sandoval from A Girl & A Gun and she graciously agreed to invite members of the organization to participate in the study. The questionnaire was fielded again in December 2017.

A total of 4,521 respondents completed the questionnaire. Of the 4,521 completed interviews, 3,394 (75.1%) were members of the USCCA, 867 (19.2%) were non-members and 260 (5.8%) were members of A Girl & A Gun.

Unless otherwise stated, the base for all counts and percentages is 4,521.

Given the source of the lists used for this study, it is likely that the results suggest higher levels of engagement with conceal carry than the average individual in the U.S. who has a conceal carry permit.

In other words, the frequency of carry, spend and purchase behaviors and attitudes towards conceal carry may be somewhat higher or more pronounced than the population average in the U.S. Nonetheless, the results are useful in that it provides guidance to the industry on how to accommodate the most active and engaged conceal carry consumers.

No weighting schema was applied to the data since the population size and distribution of firearms owners and those who carry a firearm were unknown at the time of this study. The results of this study are not projectable to the entire US population of firearms owners and those that carry a firearm. However, the results are directional and can, in combination with other available information, be used effectively for strategic decision making.

Significance testing between subgroups was conducted at the 95% confidence level ($\alpha \geq .05$). Only those differences that are significant at this level are reported unless otherwise noted. Statistical significance is denoted in two ways:

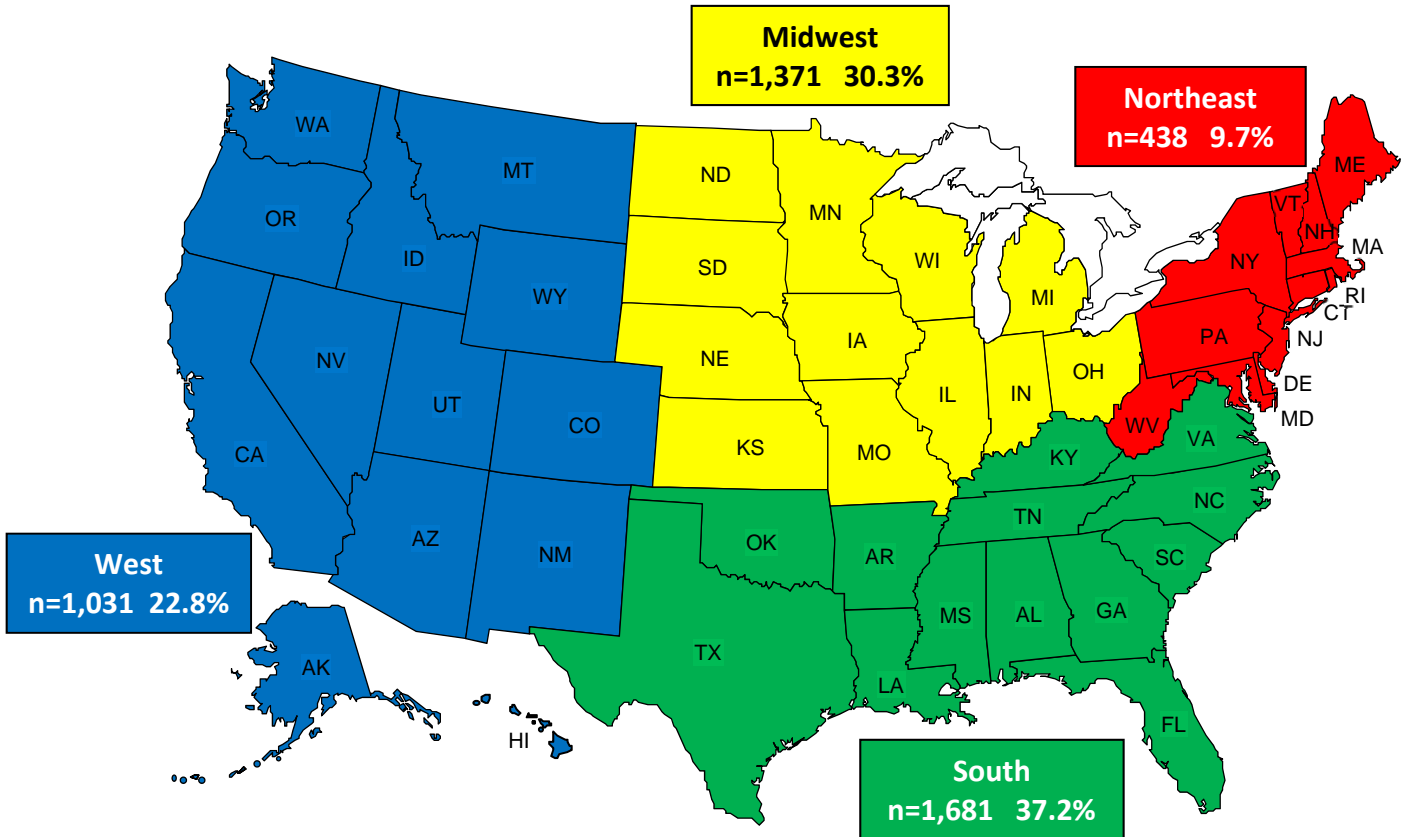
- 1) When testing differences between two groups (e.g., men and women) an asterisk (*) is used to denote that the values between groups are statistically significantly different. The asterisk will be displayed after the larger of the two values.
- 2) For variables that have more than two groups (e.g., age, geographic region) a system of letters is used to denote which subgroups differ statistically from one another. Each column will denote a letter in parenthesis and a superscript letter next to a number will denote that it is different from the number displayed in the corresponding column. As with the notation used for testing between two groups, the larger of the values that is significantly different will be noted.

Results

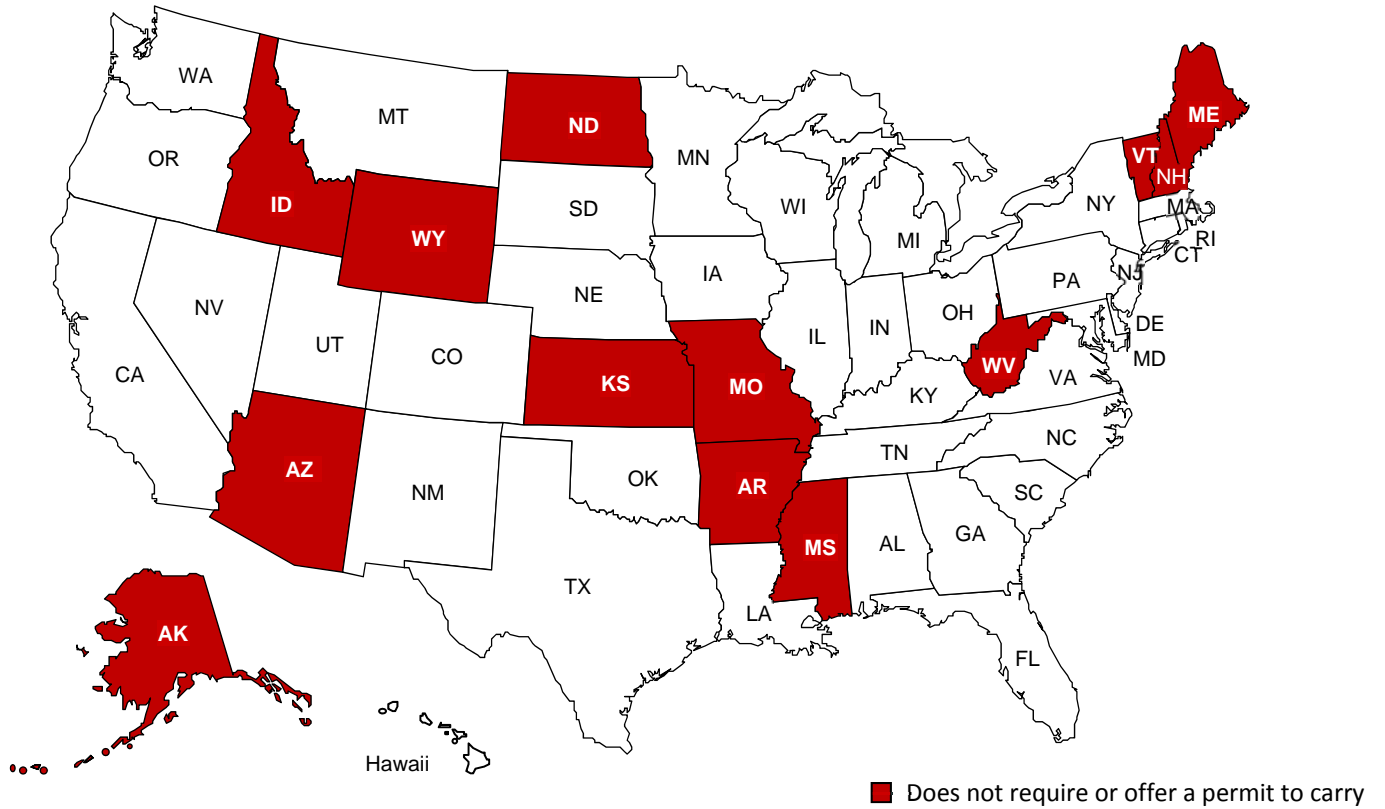
Sample Profile

Geographic Distribution

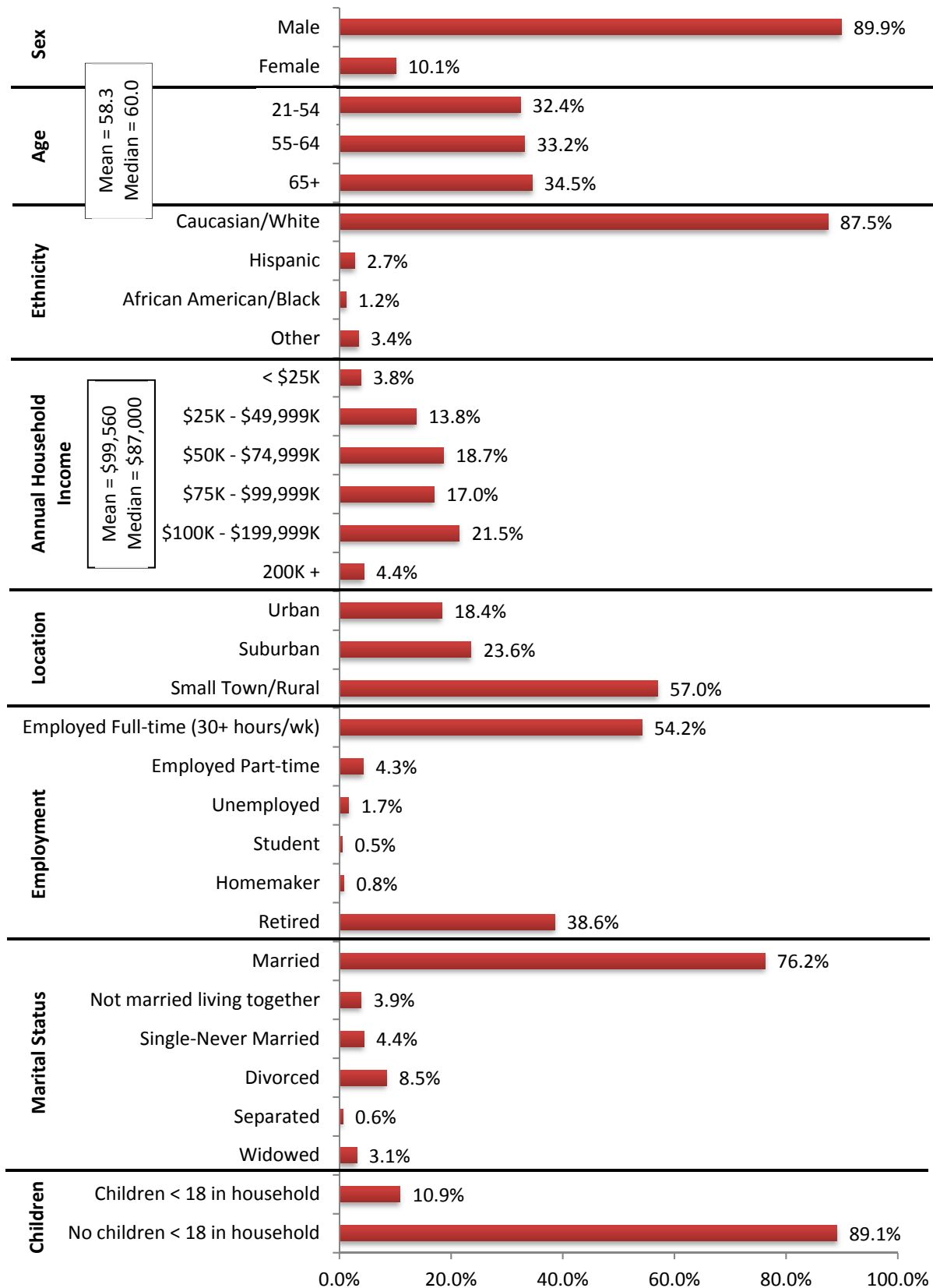
The majority of our participants came from the Southern and Midwestern states. Nearly a quarter of respondents came from the West. Slightly less than 1 in 10 respondents came from the Northeast.



There are currently 13 states that do not require a permit to carry a firearm. Of the 4,521 respondents in our sample, 631 (14.0%) come from one of these states.



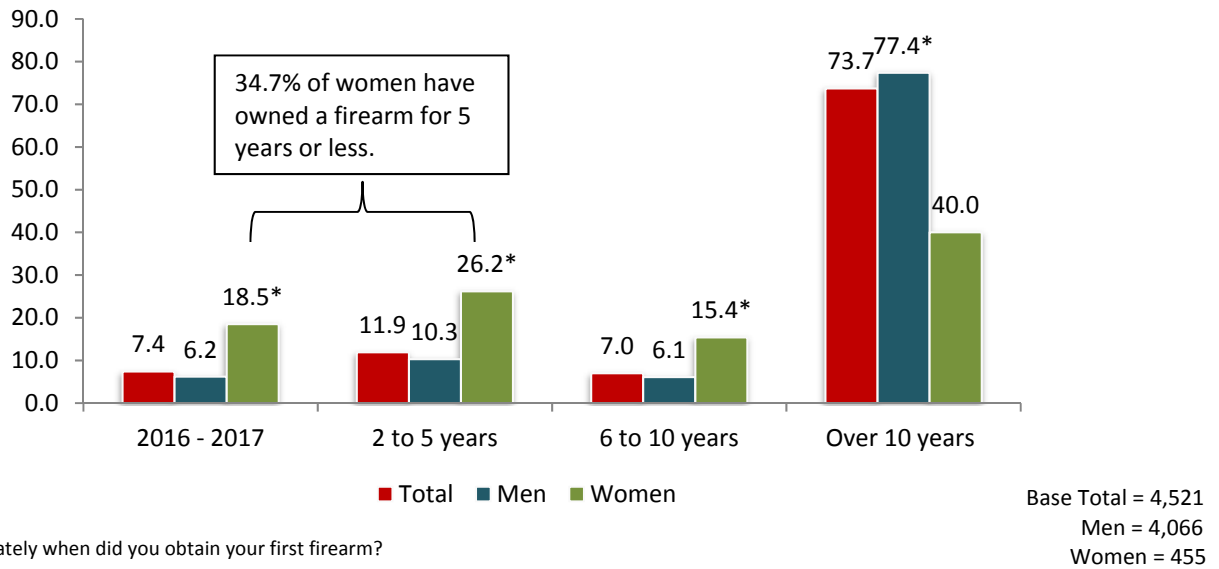
Overall Respondent Profile



Gun Ownership

Over three-quarters (77.4%) of men have owned a firearm for more than ten years while 40.0% of women have owned a firearm for that length of time. A third (34.7%) of women are relatively new to firearms having owned a firearm for five years or less.

Length of Gun Ownership (%)

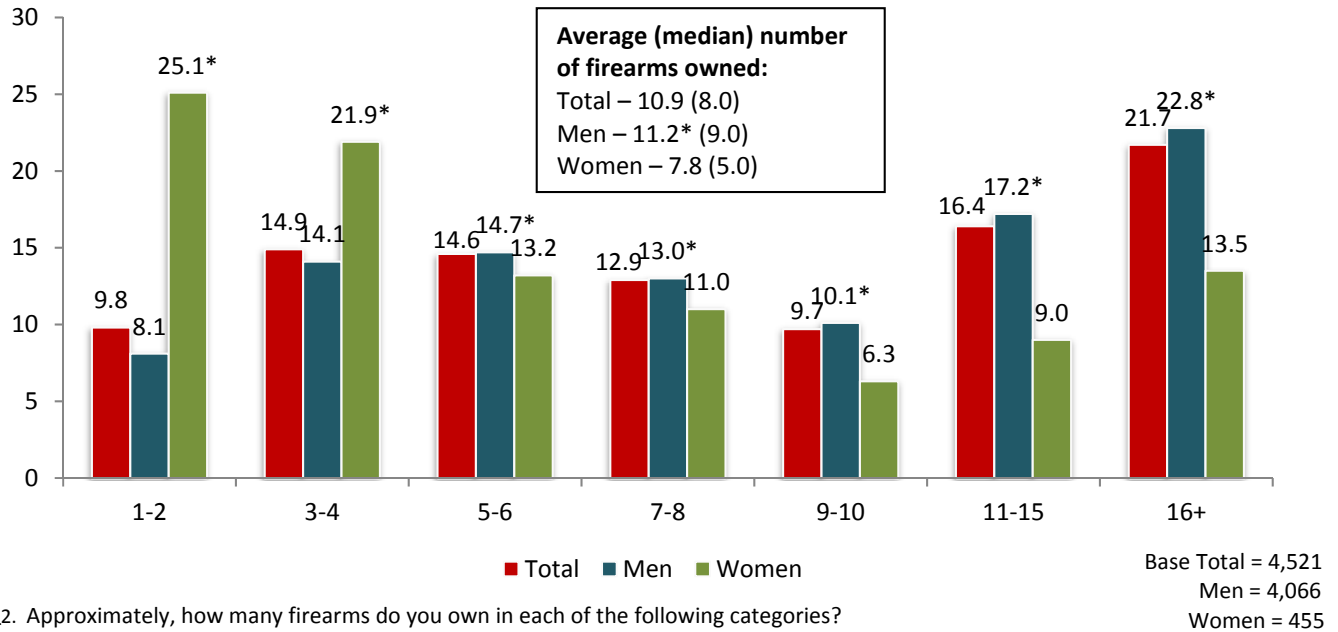


On average, participants in this study own 10.9⁴ firearms although the average for men (11.2) is significantly higher than the average owned by women (7.8). A quarter (25.1%) of women own one or two firearms and 21.9% own three or four. The difference between men and women in terms of the number of firearms owned is likely due to a number of factors but clearly the short length of time a large proportion of women have owned firearms is a factor.

*Denotes that one group is statistically significantly different from the other group.

⁴ The stated average number of firearms owned is underestimated because respondents were presented with a dropdown box ranging from "0" to "10+". 9.3% of respondents indicated that they owned 10+ firearms in one or more categories indicating that the average is significantly underestimated.

Number of Firearms Owned (%)



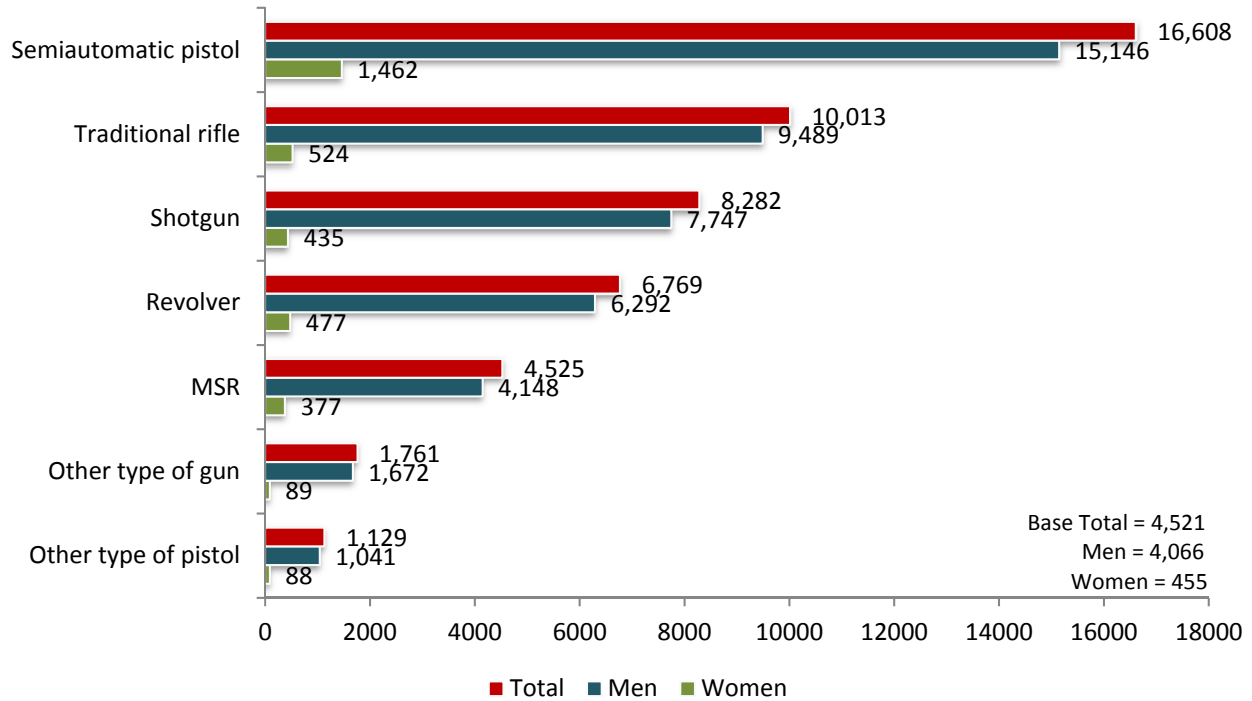
Q2. Approximately, how many firearms do you own in each of the following categories?

Nearly all respondents (98.1%) own at least one semiautomatic pistol. Long guns, both shotguns and traditional rifles, are the second most popular firearms. Slightly fewer than three quarters of respondents own at least one shotgun and traditional rifle. Revolvers are a distant fourth in ownership with less than two thirds owning at least one.

Number of Firearms Owned in Each Category (%)								
No. of Guns	Total	Semiauto -matic pistol	Shotgun	Traditional rifle	Revolver	MSR	Other	Other type of pistol
0	-	1.8	26.8	28.3	38.5	50.1	82.8	85.8
1	4.1	16.4	29.4	23.5	26.7	27.5	8.6	8.8
2	5.7	22.7	18.2	16.2	14.7	11.4	4.2	3.0
3	7.4	17.2	9.9	9.4	7.9	4.7	2	1.1
4	7.5	13.2	6.2	7.2	4.7	2.6	0.7	0.6
5	7.7	9.5	3.5	4.8	2.6	1.4	0.6	0.2
6	6.9	5.8	2.5	3.5	1.7	0.8	0.3	0.2
7	6.7	3.0	0.7	1.3	0.7	0.3	0	0.1
8	6.2	2.3	0.8	1.3	0.5	0.4	0	0.0
9	4.8	1.0	0.1	0.5	0.2	0.1	0	0.0
10 or more	43.1	7.0	1.8	3.9	1.7	0.8	0.8	0.1
% Own at least one	100	98.1	73.1	71.6	61.4	50.0	17.2	14.1

Respondents reported owning a total of 49,087⁵ firearms, a third (33.8%) of which are semiautomatic pistols. After semiautomatic pistols, long guns, both traditional rifles (20.4%) and shotguns (16.9%) are owned in the largest quantities. Revolvers make up only 13.8% of the total firearms owned by respondents.

Total Number of Firearms Owned



Gun Type	Average (Mean) per Person	Average (Mean) Men	Average (Mean) Women
Total	10.9	11.2*	7.8
Semiautomatic Pistol	3.7	3.7	3.2
Traditional rifle	2.2	2.3	1.2
Shotgun	1.8	1.9	1.2
Revolver	1.5	1.6	1.1
MSR	1.0	1.0	0.8
Other type of gun	0.4	0.4	0.2
Other type of pistol	0.3	0.3	0.2

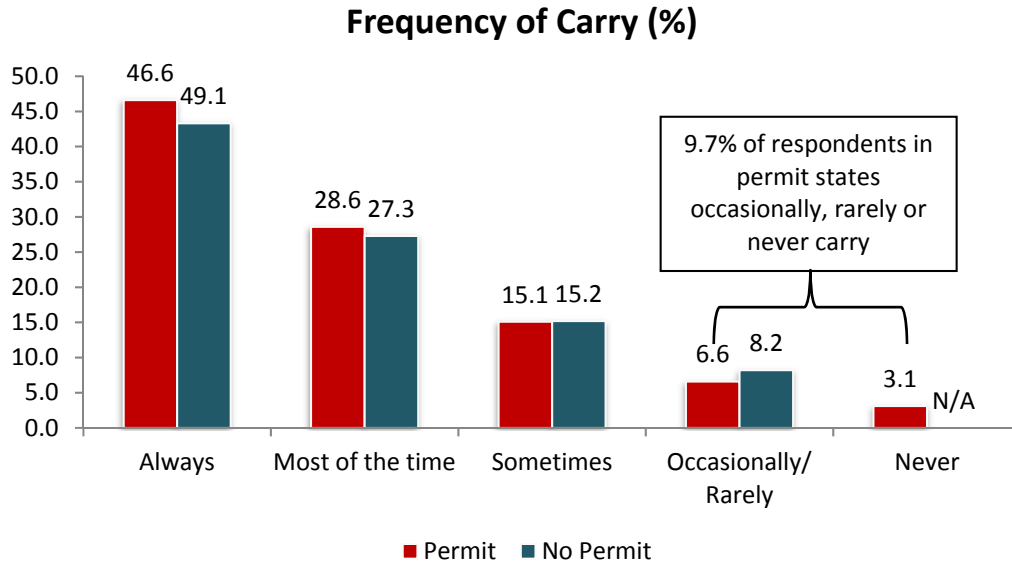
Q2. How many guns do you own in each of the following categories? If you don't own a particular type of gun in a category, please enter a "0".

Base Total = 4,521
Men = 4,066
Women = 455

⁵ The total number of firearms owned is also underestimated because respondents were presented with a dropdown box ranging from "0" to "10+". 9.3% of respondents indicated that they owned 10+ firearms in one or more categories indicating that the average is significantly underestimated.

Carry Behaviors

Nearly half of respondents carry all the time – either when they leave the home or both in and out of the home. Only 6.6% of respondents carry occasionally or rarely in no-permit states⁶ and 9.7% carry never/rarely/occasionally in permit states. There is little difference in the frequency of carry behavior between permit and no-permit states.



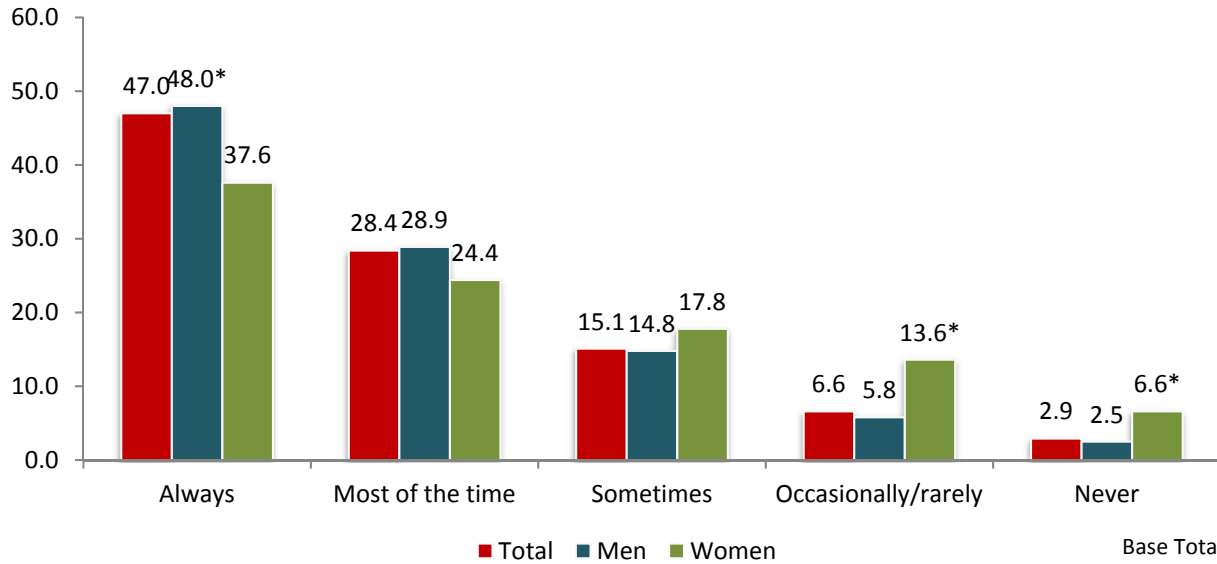
Base Total = 4,521
 Permit = 3,890
 No Permit = 631

S10. How frequently, if at all, do you carry a firearm, either open or concealed?

Overall, men carry significantly more frequently than women. Almost half of men (48.0%) indicated they always carry a firearm while a little over a third (37.6%) of women always carry. Significantly more women carry only occasionally or rarely (13.6%) or not at all (6.6%).

⁶ Respondents from no-permit states had to carry at least “Rarely” to qualify for this study.

Frequency of Carry (%)

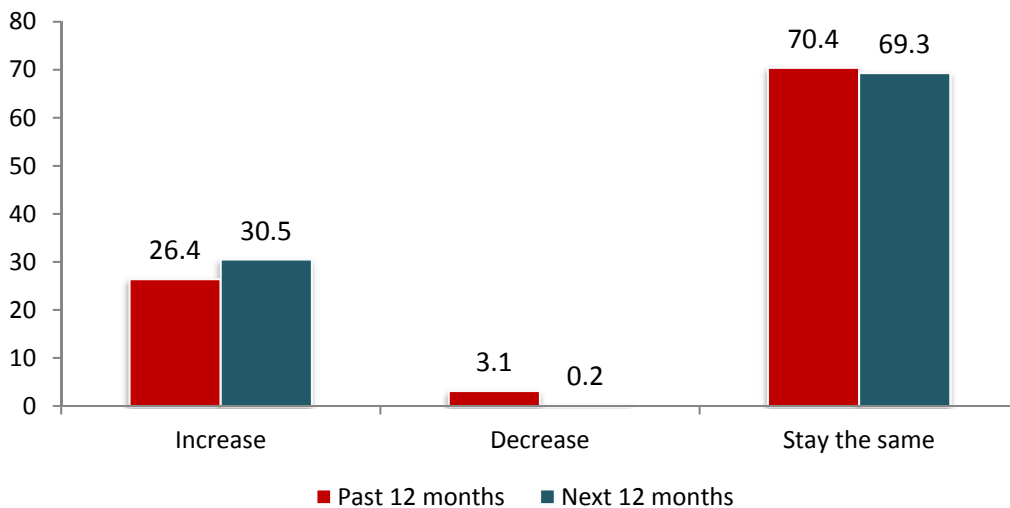


Base Total = 4,521
 Men = 4,066
 Women = 455

S10. How frequently, if at all, do you carry a firearm, either open or concealed?

The majority of respondents (70.4%) have not changed their frequency of carry over the past 12 months and do not anticipate changing their frequency of carry in the coming 12 months (69.3%). However, a little over a quarter of respondents (26.4%) indicated that their frequency of carry increased over the past 12 months and nearly a third (30.5%) of respondents intend to carry their firearm more frequently in the coming 12 months. The percentage of respondents who have decreased their frequency of carry over the past 12 months is a nominal 3.1% and only 0.2% say they will decrease their frequency of carry in the next 12 months.

Change in Carry Frequency (%)



Q13. Has your frequency of carry increased, decreased or stayed the same over the past 12 months?
 Q14. Do you think your frequency of carry increase, decrease or stay the same in the next 12 months?

Base Q13 = 3305
 Base Q14 = 4,521

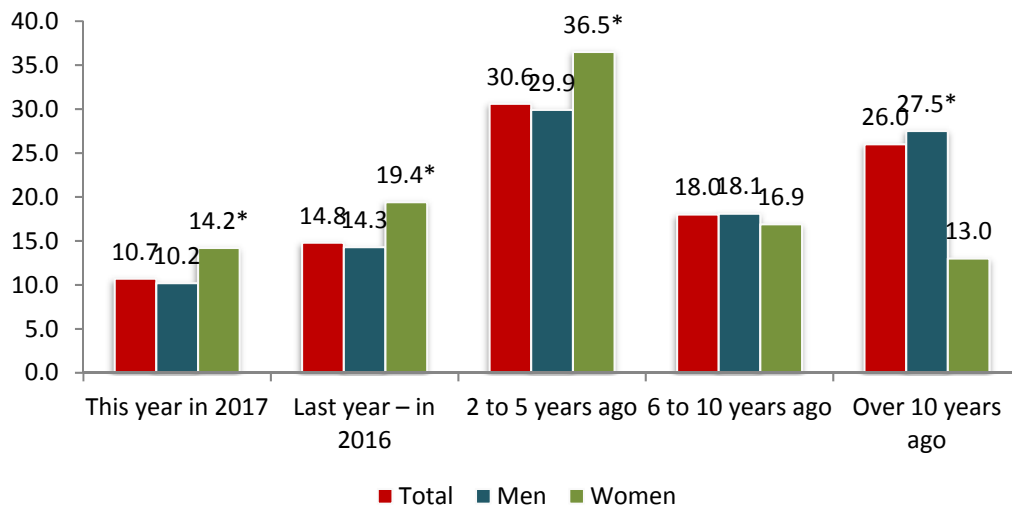
Nearly three quarters of men have not changed their frequency of carry from the past 12 months (70.9%) and do not anticipate changing their frequency of carry in the next 12 months (70.4%). Women, on the other hand, continue to increase their carry frequency. Although two thirds of women (64.3%) indicated that their carry frequency remained constant over the past 12 months, nearly a third (31.4%) indicated their carry frequency increased. And, significantly more women (40.9%) indicated they anticipated carrying a firearm more frequently in the next 12 months than men. Frequency of carry is clearly on the rise for women.

Change in Carry Frequency						
	Past 12 Months			Next 12 Months		
	Total	Men	Women	Total	Men	Women
Increase	26.4	26.0	31.4	30.5	29.4	40.9*
Decrease	3.1	3.0	4.3	0.2	0.2	0
Stay the same	70.4	70.9*	64.3	69.3	70.4*	59.1

On average, respondents first obtained their carry permit approximately 5.8 years ago (median = 3.5). A significant proportion of respondents are new to carry. A quarter (25.5%) of respondents first obtained a permit to carry a firearm less than two years ago and over half (56.1%) obtained a permit within the past five years. Slightly over a quarter (26.0%) of respondents obtained a permit ten or more years ago.

Women are newer to conceal carry than men. Nearly three-quarters (70.1%) of women obtained their conceal carry license in the past five years which is significantly more than men (54.4%) during the same time span.

When Obtained Permit to Carry (%)

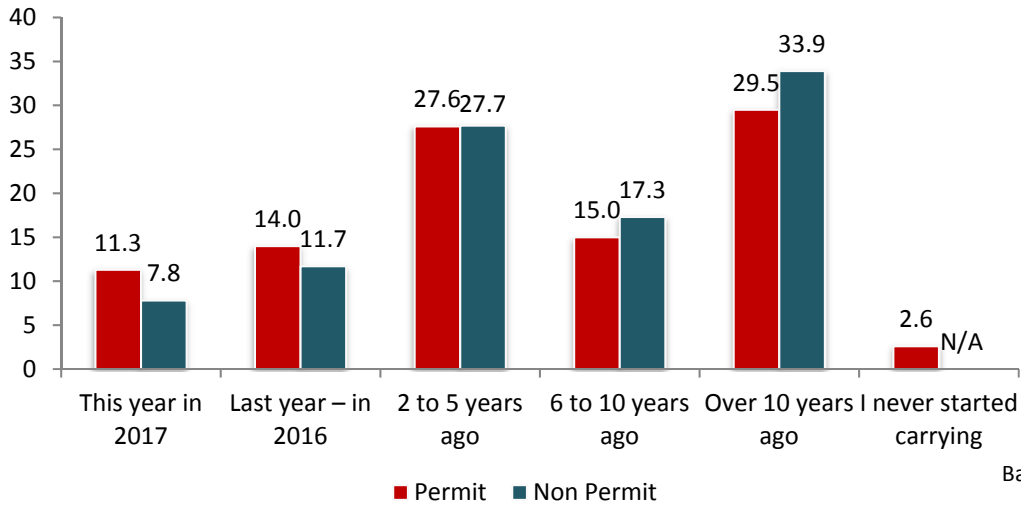


Base Total = 3,868
 Men = 3,460
 Women = 408

Q6. When did you first obtain a permit to carry a firearm?

Those from no-permit states have been carrying a firearm significantly longer (mean = 6.8 years, median = 8.0 years), on average, than those from states requiring a permit to carry (mean = 6.1 years, median = 3.5 years).

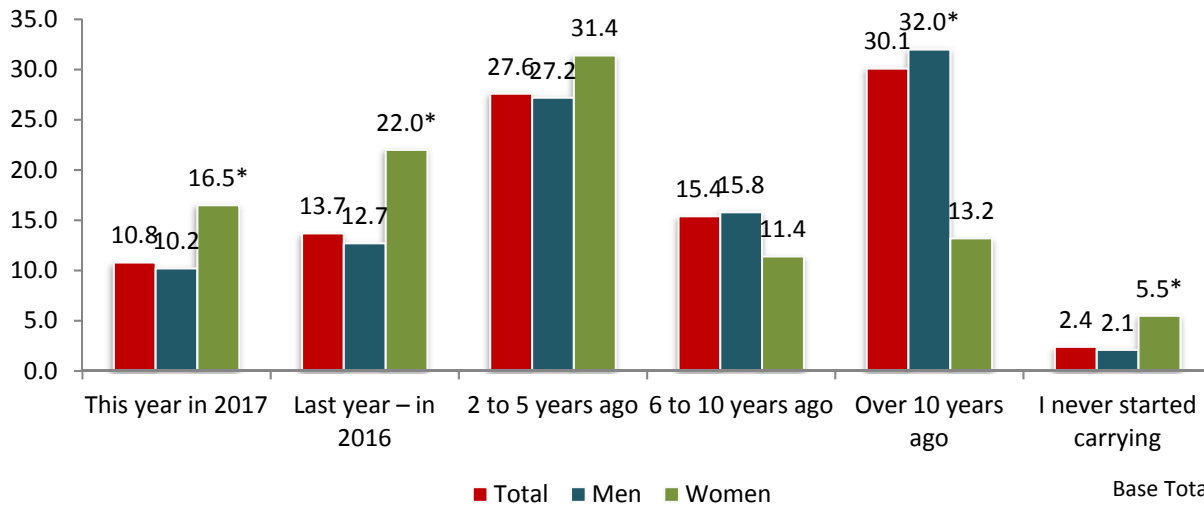
When Started to Carry (%)



Q7. When did you first start to carry a firearm?

Significantly more women (38.5%) started to carry a firearm in 2016 -17 than men (22.9%) and the majority of women (69.9%) started carrying within the past five years while half (50.1%) of men started carrying during the same span of time.

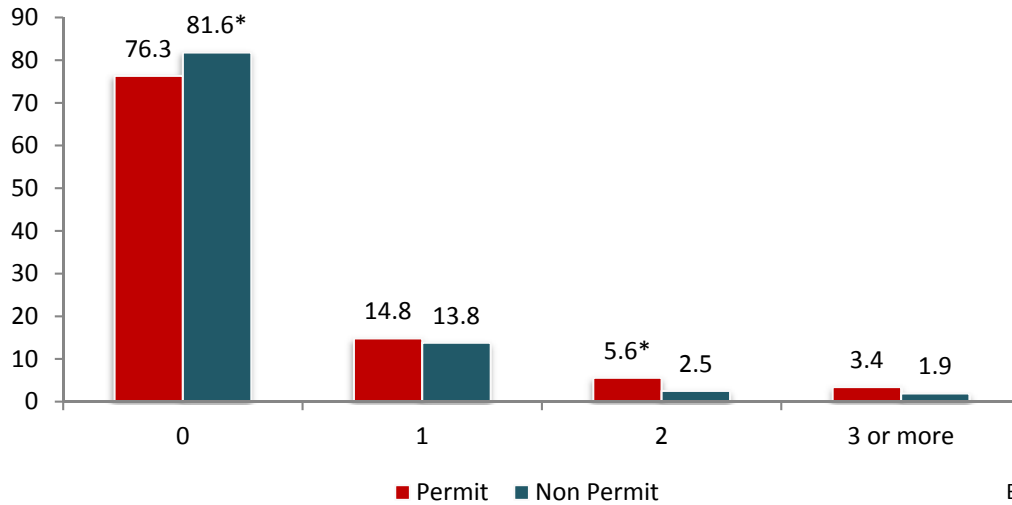
When Started to Carry (%)



Q7. When did you first start to carry a firearm?

Overall, 23.0% of respondents have one or more permits from states other than their primary state of residency. However, those from states that require a permit have significantly more permits from other states than those who live in states that do not require a permit to carry.

Number of Permits from Other States (%)



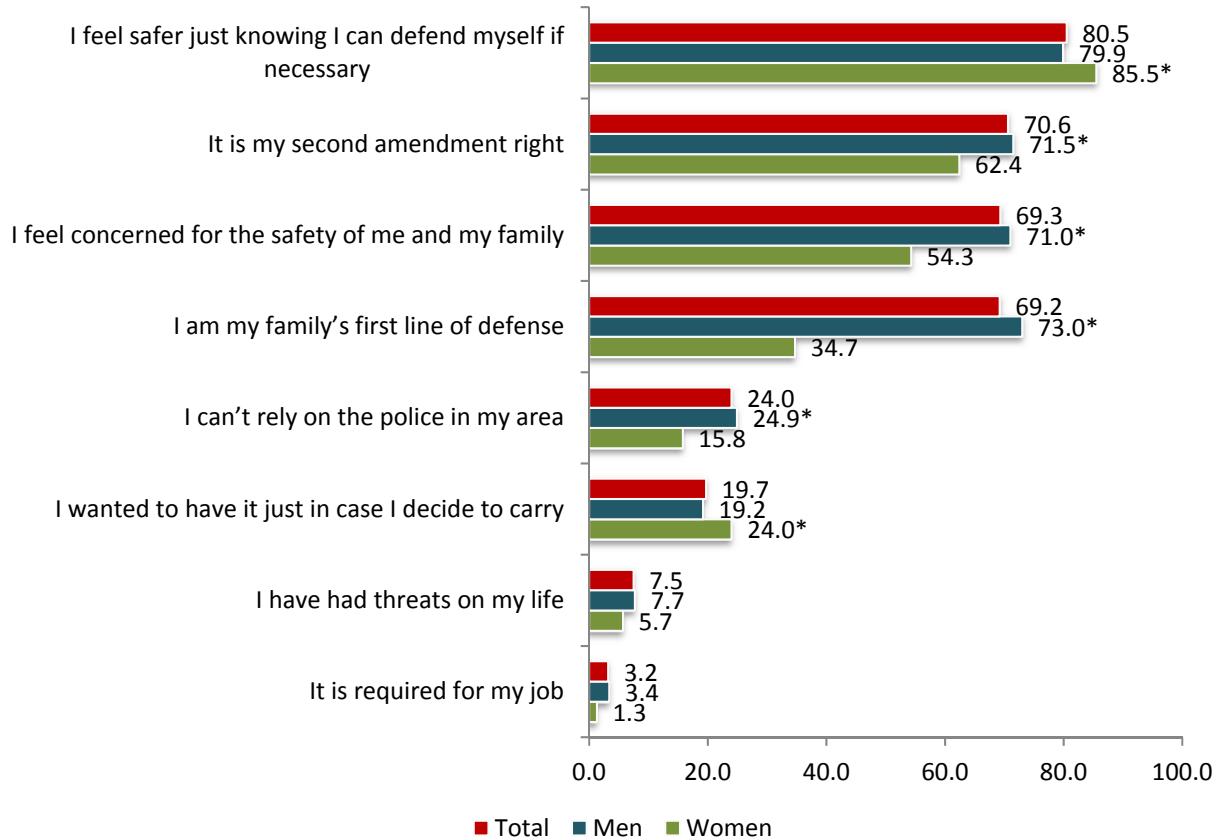
Base Total = 4,521
 Permit = 3,890
 Non-Permit = 631

Q8. How many carry permits do you have from states other than the state of primary residence.

It is not surprising the defense, for both self and family, is the primary reason for obtaining a permit to carry. The overwhelming majority of respondents (80.5%) indicated self-defense was a reason for obtaining a permit. Two-thirds of respondents also indicated that safety for themselves and their family (69.3%) and being the family’s first line of defense (69.2%) were also reasons for obtaining their permit. Nearly three quarters of respondents (70.6%) indicated that they obtained a permit because it was their second amendment right.

Significantly more women (85.5%) than men (79.9%) indicated that they felt safer knowing they could defend themselves. More women (24.0%) than men (19.2%) also indicated they wanted their permit in case they decided to carry. Men tended to be more concerned about acting as the first line of defense for both themselves and their family than women.

Reasons to Obtain a Permit to Carry (%)

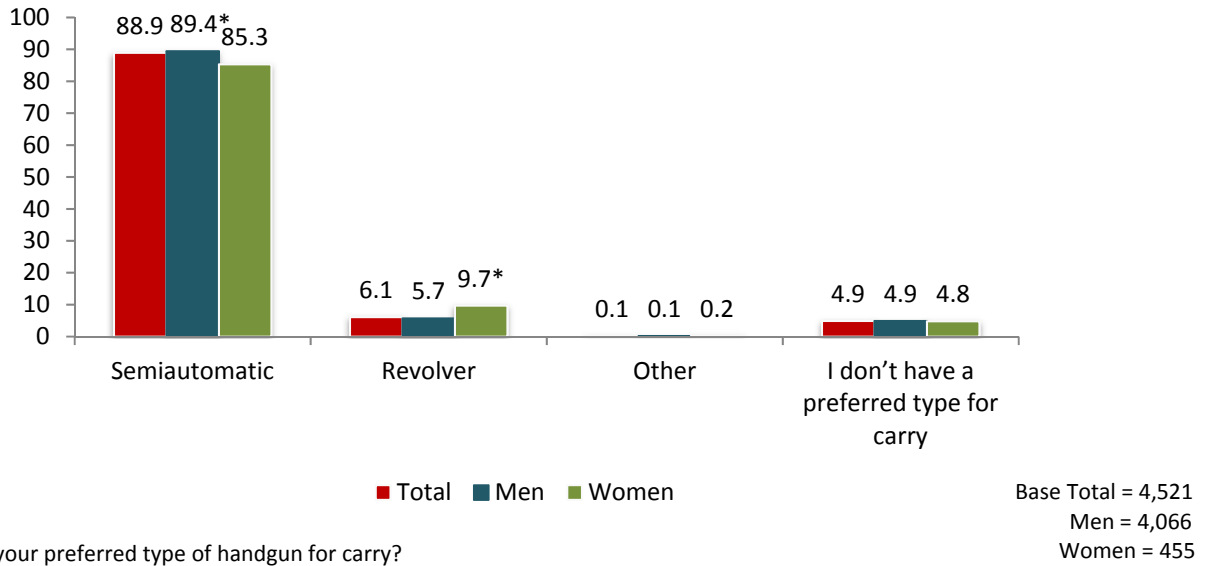


Base Total = 4,521
 Men = 4,066
 Women = 455

Q9. Why did you decide to obtain your carry permit and/or start carrying a firearm? Check all that apply.

The semiautomatic pistol is by far the most preferred firearm for carry with 88.9% of respondents indicating it was their firearm of choice. Although the majority of women also prefer semiautomatic handguns for conceal carry, significantly more women prefer revolvers (9.7%) than do men (5.7%).

Preferred Firearm for Carry (%)

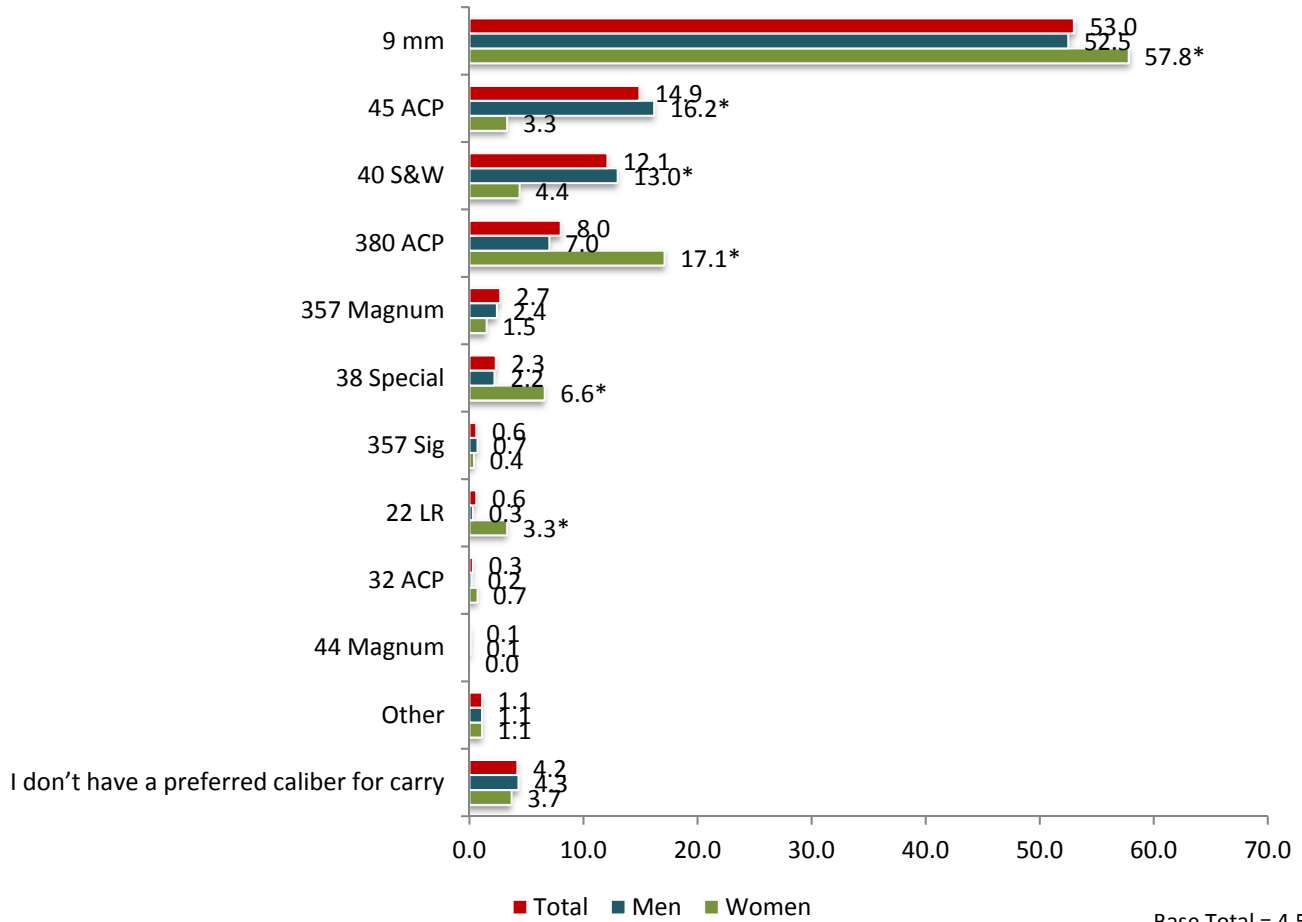


Q10. What is your preferred type of handgun for carry?

The most popular caliber of carry pistol is 9mm (53.0%), preferred by over half of respondents. 45 ACP (14.9%) and 40 S&W (12.1%) are distant seconds.

The 9mm is unquestionably preferred by both men and women although significantly more women (57.8%) prefer a 9mm than men (52.5%). However, going beyond the 9mm, women tend to prefer smaller calibers and men tend to prefer larger calibers. Significantly more women prefer .380 (17.1%), 38 special (6.6%) and 22LR (3.3%) as compared to men (7.0%, 2.2%, and 0.3%, respectively). Men, on the other hand, prefer larger calibers like 45 ACP (16.2%) and 40 S&W (13.0%) relative to women (3.3% and 4.4%, respectively).

Preferred Caliber of Handgun to Carry (%)

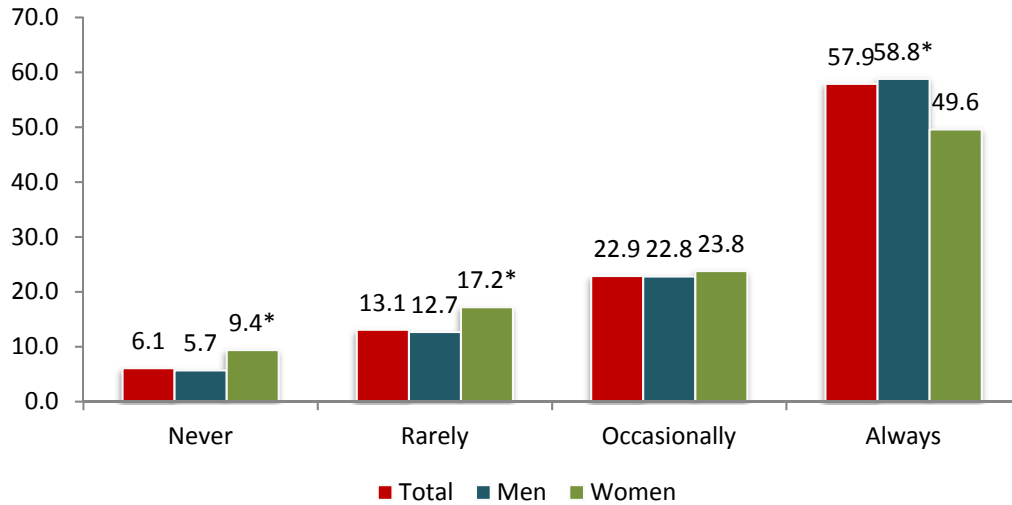


Base Total = 4,521
 Men = 4,066
 Women = 455

Q11. What is your preferred caliber of handgun for carry?

Over half (58.5%) of respondents always carry spare ammunition along with their firearm and 19.2% either rarely or never carry spare ammo. Men carry spare ammo significantly more frequently than women. Although half (49.6%) of women say they always carry spare ammo, a quarter (26.6%) rarely or never carry spare ammo. Over half of men (58.8%) indicated they always carry spare ammo while only 18.4% rarely or never carry spare ammo.

Frequency of Carrying Spare Ammo (%)



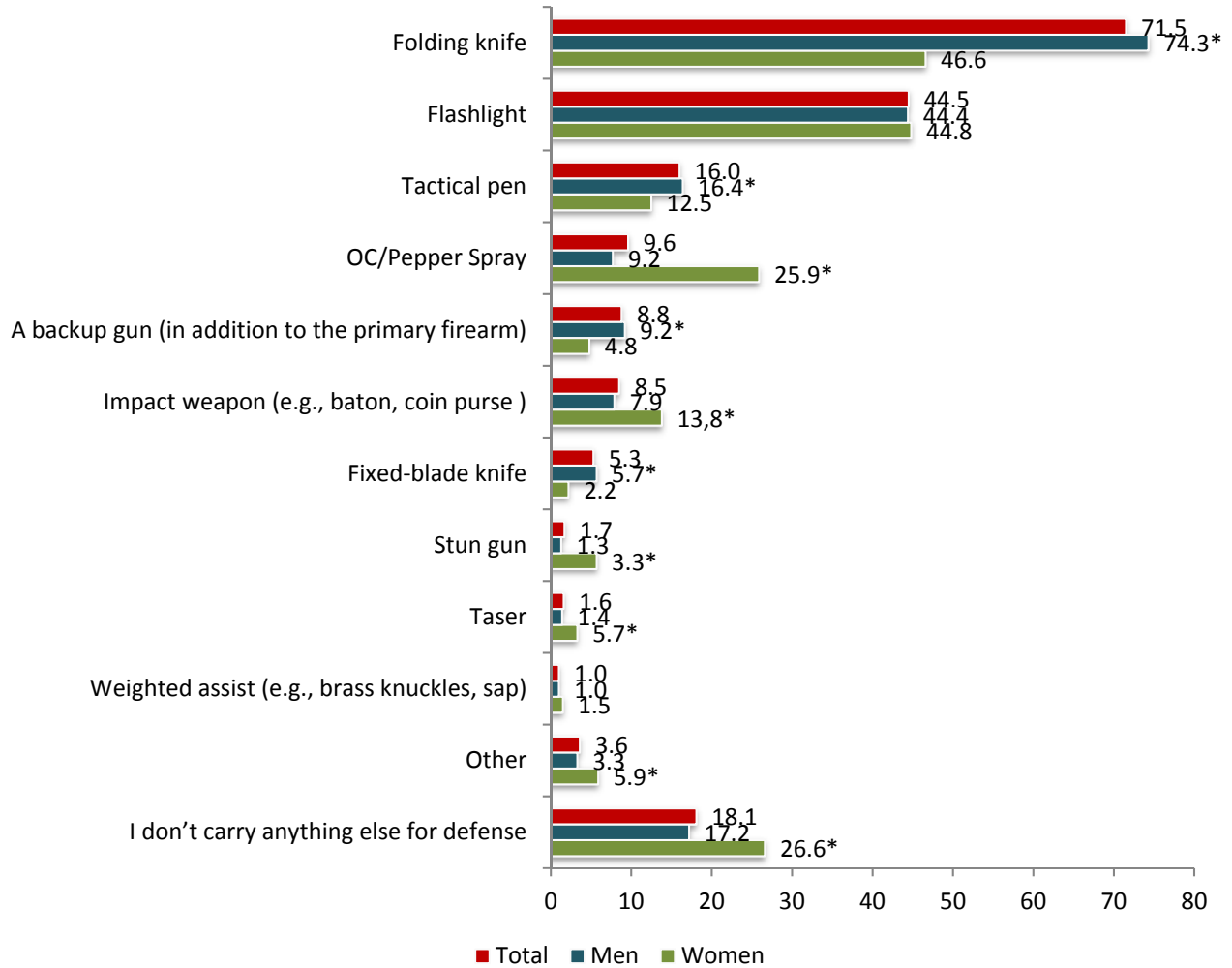
Base Total = 4,521
 Men = 4,066
 Women = 455

Q15. How frequently, if at all, do you carry spare ammo along with your firearm?

Nearly three quarters (73.1%) of respondents carry a folding knife on a regular basis for defensive purposes making it by far the most frequently carried defense item aside from a firearm. Nearly half (44.5%) of respondents carry a flashlight. But one in five (17.5%) respondents do not carry any other items for defense.

Men are significantly more likely to carry additional items for self-defense than women. A quarter of women (26.6%) indicated they did not carry anything else for self-defense as compared to men (17.2%). Three quarters of men (74.3%) indicated they carry a folding knife while less than half of women (46.6%) carry one. Women tend to prefer defensive items that do not require close combat such as pepper spray (25.9%), impact weapons (13.8%), stun guns (5.7%) and Tasers (3.3%) as compared to men. Both men and women will carry a flashlight.

Other Items Carried for Self-Defense (%)



Base Total = 4,521

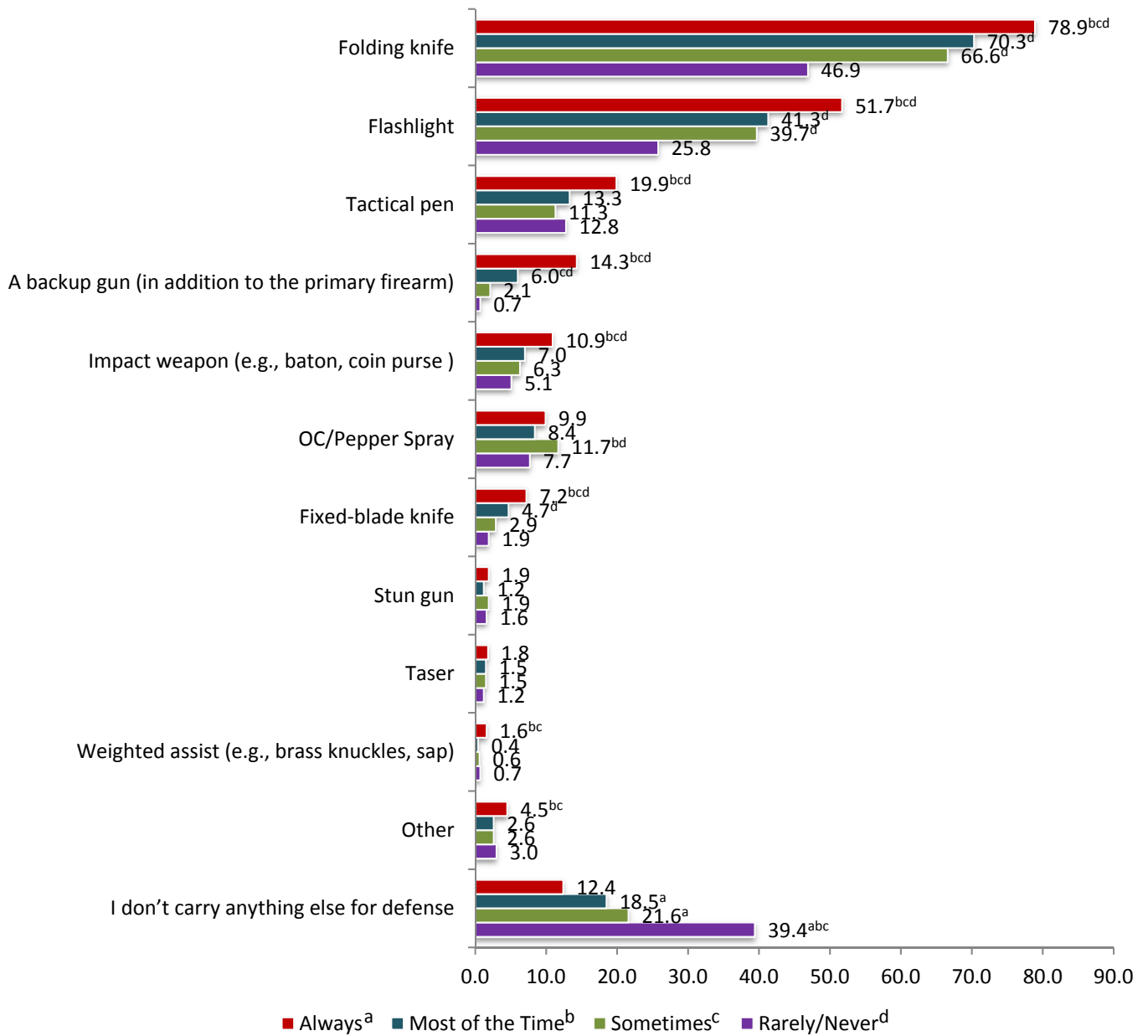
Men = 4,066

Women = 455

Q16. What items do you carry with you on a regular basis for purposes of defense?

The more frequently respondents carry a firearm the more likely they are to carry other items for defense on a regular basis. Those who carry a firearm all the time or very frequently tend to carry other items. And significantly fewer respondents who report they rarely or never carry a firearm carry other items with regularity as compared to those who carry a firearm more frequently. Only 12.4% of respondents who always carry a firearm don't carry at least one other item. This is true for both men and women.

Frequency of Carrying Other Items by Frequency of Carrying a Firearm (%)

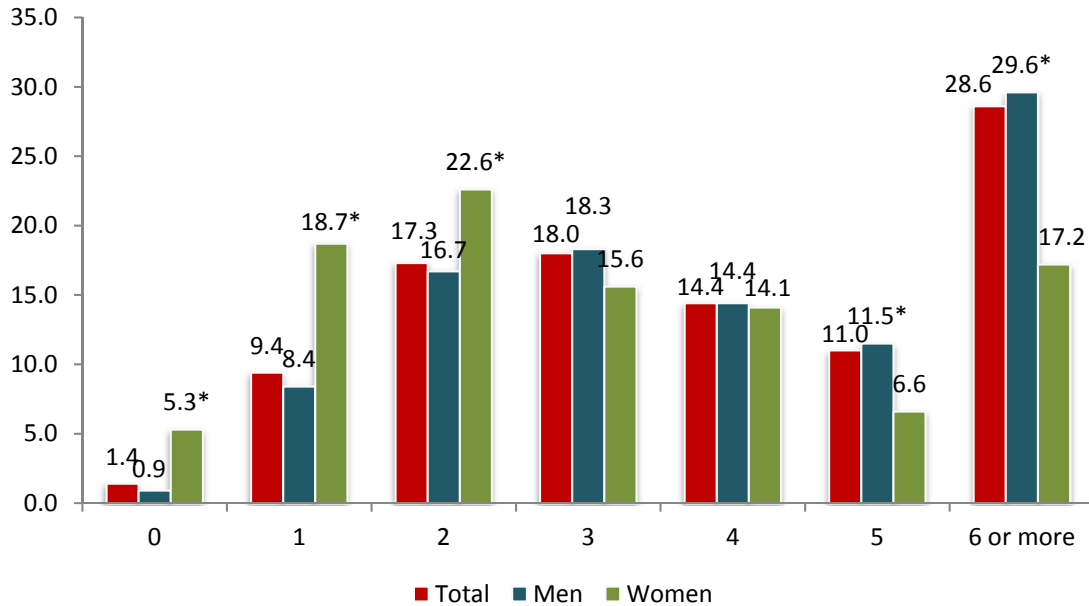


Q16. What items do you carry with you on a regular basis for purposes of defense?

Base = 4,521

On average respondents own 4.4 carry holsters for either open or concealed carry. The largest proportion of respondents (28.6%) own six or more holsters. Men own significantly more carry holsters, on average 4.5, than women (3.4) specifically for carry.

Number of Carry Holsters Owned (%)

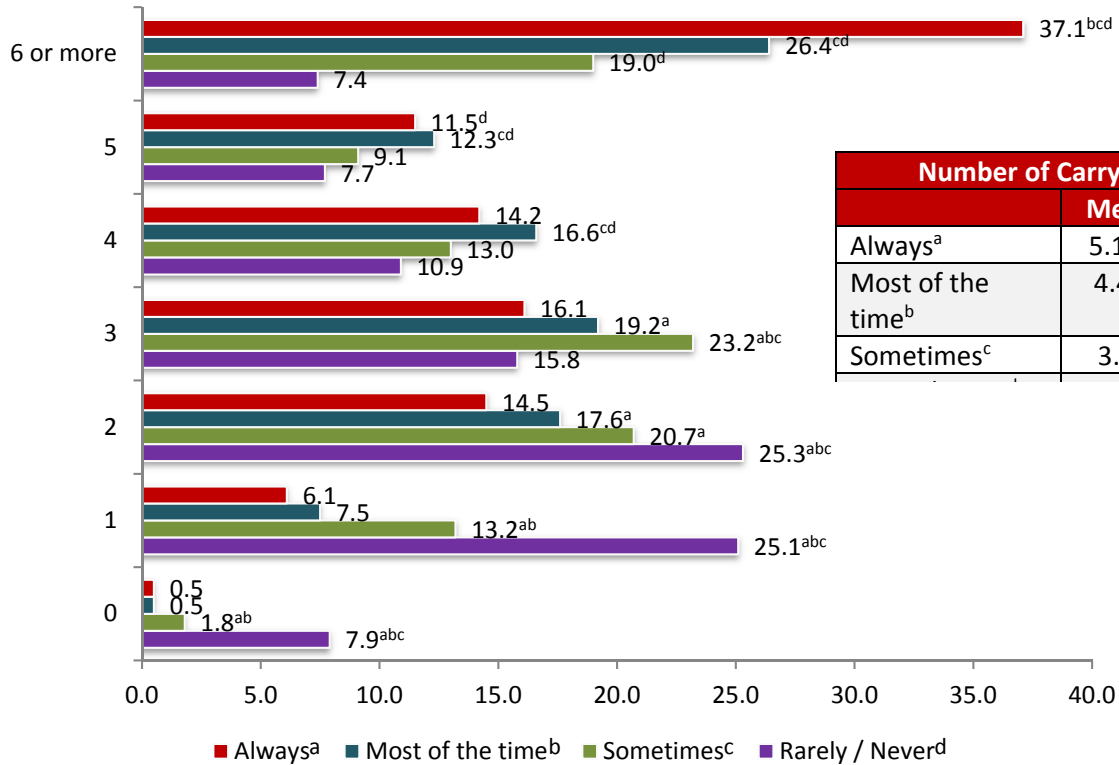


Base Total = 4,521
 Men = 4,066
 Women = 455

Q17. How many holsters do you own for carry, either open or concealed?

It is not surprising that the more frequently respondents carry a firearm the more holster's they typically own and vice versa. Respondents who always carry a firearm own, on average, significantly more holsters for carry than those who carry less frequently.

Number of Carry Holsters by Frequency of Carry (%)



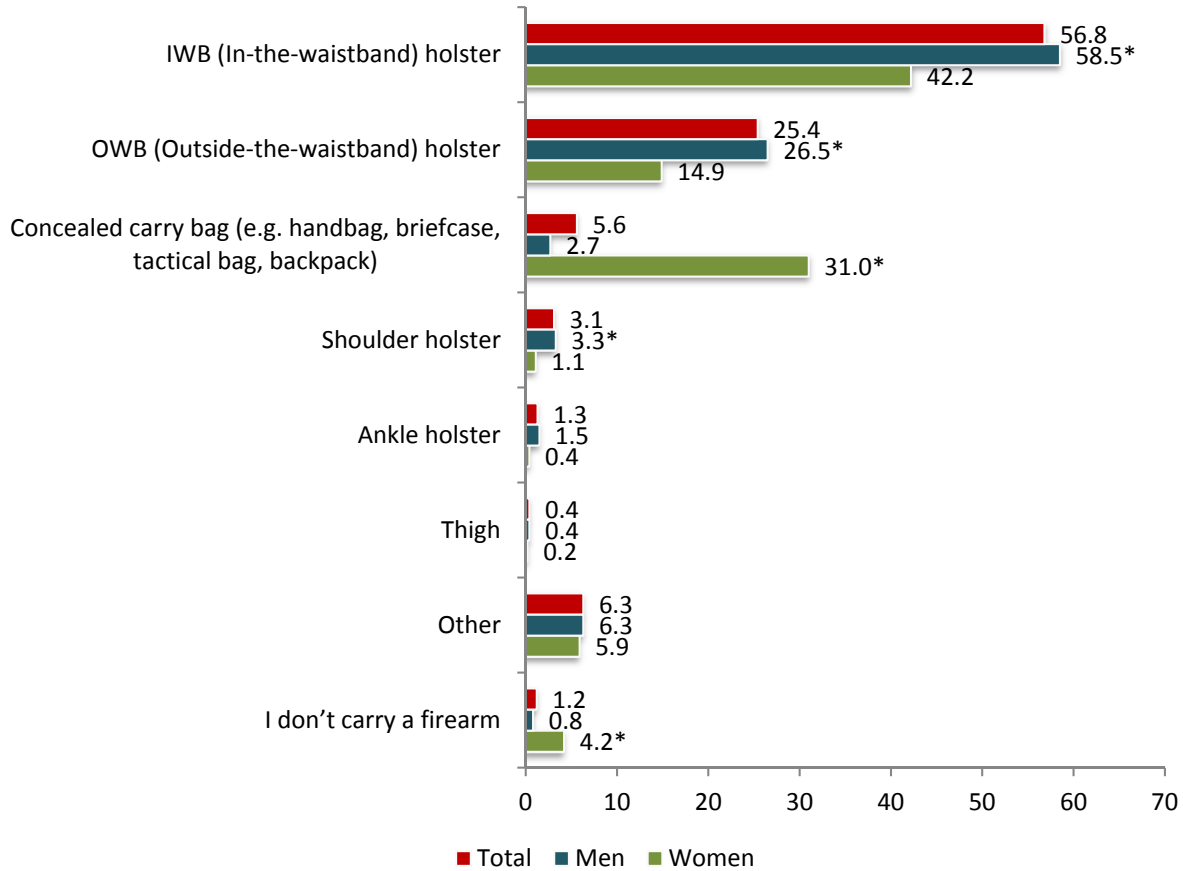
Number of Carry Holsters		
	Mean	Median
Always ^a	5.1 ^{bcd}	4
Most of the time ^b	4.4 ^{cd}	4
Sometimes ^c	3.7 ^d	3

Q17. How many holsters do you own for carry, either open or concealed?

Base = 4,521

Both men and women prefer to carry their firearm at the waist. Over half of men (58.5%) and a little less than half (42.2%) of women prefer to carry their firearm in-the-waistband. However, men and women diverge from here. A quarter of men (26.5%) prefer to carry a firearm outside-the-waistband while a third of women (31.0%) prefer to carry in a handbag.

Preferred Style of Carry (%)

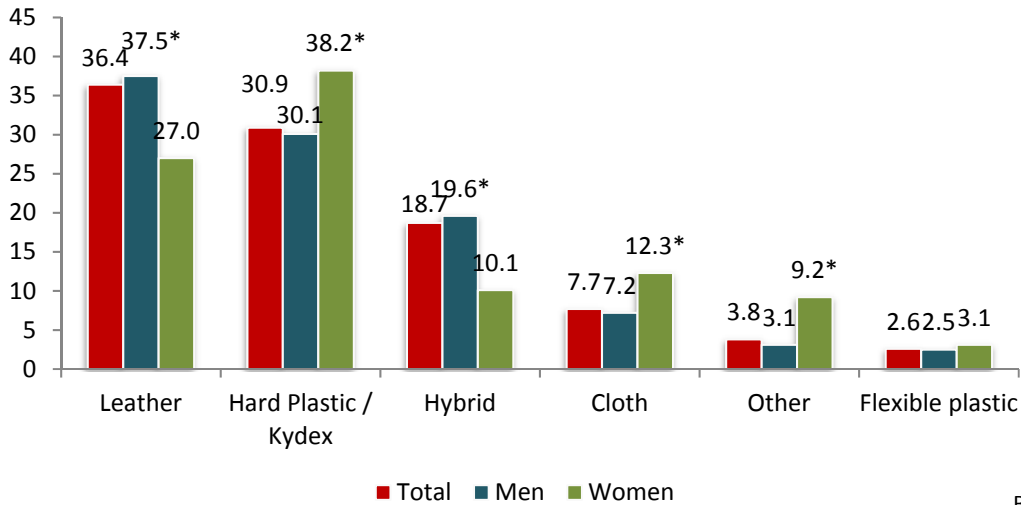


Base Total = 4,521
 Men = 4,066
 Women = 455

Q19. What is your preferred style of either open or concealed carry?

Men prefer holsters made of leather (37.5%) or a hybrid material (19.6%) while women prefer hard plastic/Kydex® (38.2%) and cloth (12.3%).

Preferred Holster Material (%)

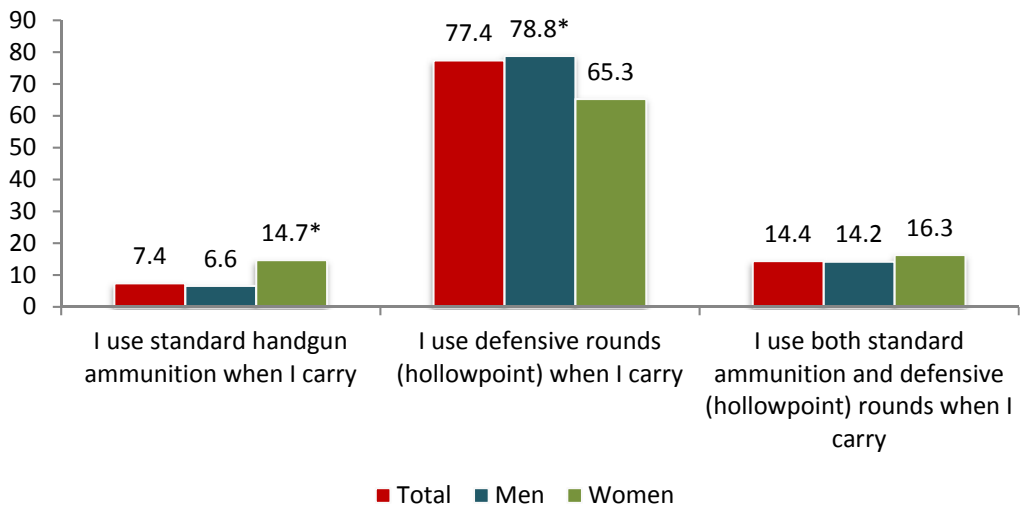


Base Total = 4,521
 Men = 4,066
 Women = 455

Q18. What is your preferred type of holster material?

The majority of respondents use defensive rounds when carrying although significantly more men (78.8%) use defensive rounds than women (65.3%). Significantly more women (14.7%) use standard handgun rounds when carrying a pistol for defense than men (6.6%).

Type of Ammo Used When Carrying for Defense (%)



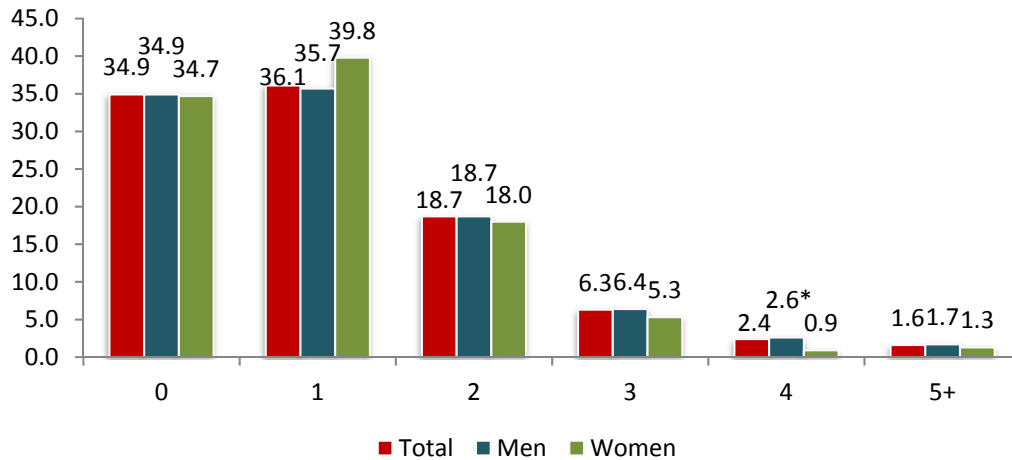
Base Total = 4,521
 Men = 4,066
 Women = 455

Q20. What type of ammunition do you use when you carry a firearm for defense?

Spend On Firearms, Ammunition, Equipment and Accessories

Respondents, on average, purchased 1.1⁷ firearms in the past 12 months for carry. There were only very minor differences between men and women in firearms purchases in the past year. Men purchased an average of 1.1 firearms while women purchased an average of 1.0 firearm in the past year.

Number of Firearms Purchased in Last 12 Months for Carry (%)



Base Total = 4,521
 Men = 4,066
 Women = 455

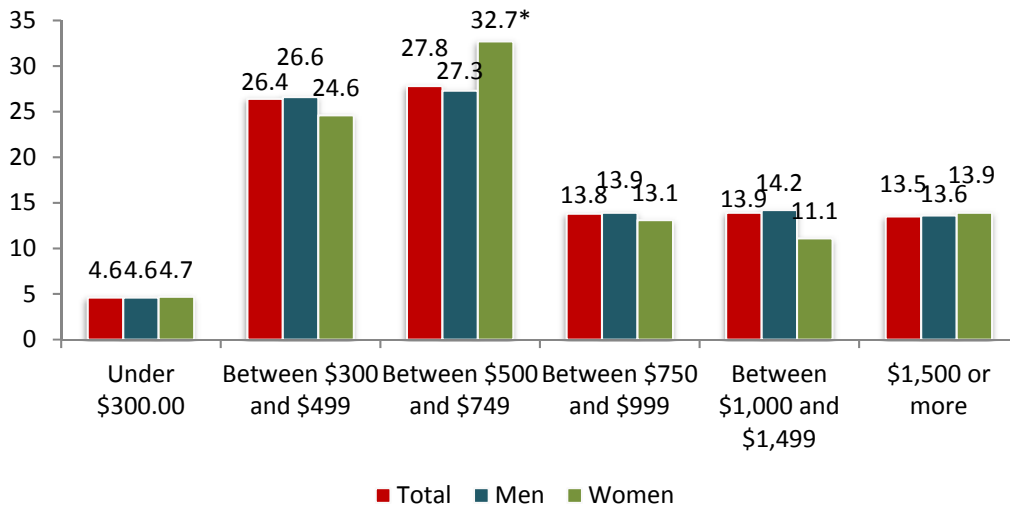
Q22. How many handguns, if any, have you purchased specifically for carry, either open or concealed, in the past 12 months?

Of those who purchased one or more firearms for carry in the past 12 months, respondents spent an average of \$902.10⁸ (median = \$625.00). Slightly over half (54.2%) of respondents spent between \$300 and \$750 on firearms. Men (\$905.80) and women (\$889.50), on average spent the nearly the same amount.

⁷ The number of firearms purchased in the past 12 months specifically for carry is underestimated. Respondents were provided with a drop-down box ranging from “0” to “5+”. A small percentage (1.7%) of respondents indicated they purchased 5 or more firearms for carry in the past 12 months which indicates the average purchase of 1.1 firearms is low.

⁸ The amount spent on firearms specifically for carry in the past 12 months is underestimated. In Q23 respondents were provided with a drop-down box ranging from “I have not purchased any handgun ammunition in the past 12 months” to “\$5,000 or more”. A small percentage (0.5%) of respondents indicated they spent \$5,000 or more on firearms for carry in the past 12 months which indicates the average amount of \$902.10 is low.

Total Spend on Carry Firearms in Past 12 Months (%)

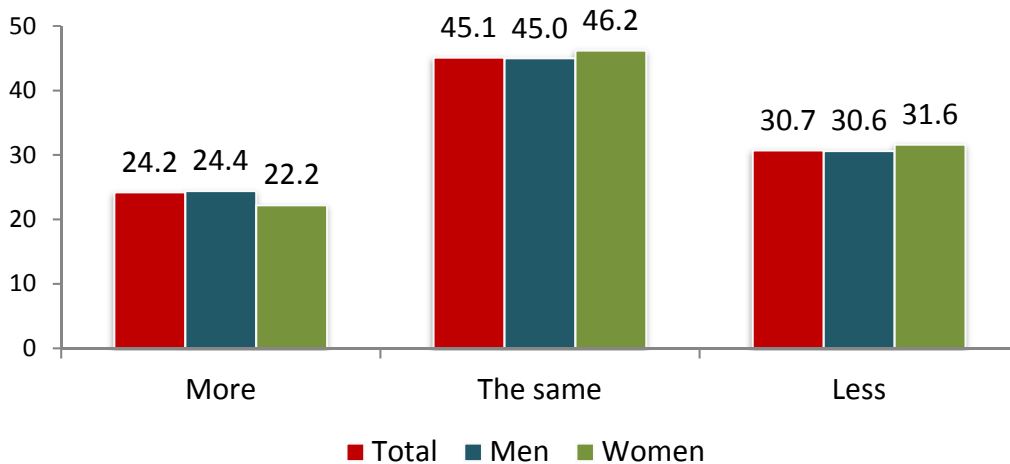


Base Total = 2,944
 Men = 2,647
 Women = 297

Q23. Approximately how much did you spend, in total, on the handguns you purchased in the past 12 months specifically for carry?

A little less than half of respondents (45.1%) intend to spend the same amount on firearms for carry in the next 12 months as they did in the past 12 months. More respondents intend to spend less on firearms for carry (30.7%) than intend to spend more (24.4%). There is little difference between men and women by their intentions to spend on firearms for carry in the next 12 months.

Intention to Spend on Carry Firearms in Next 12 Months (%)

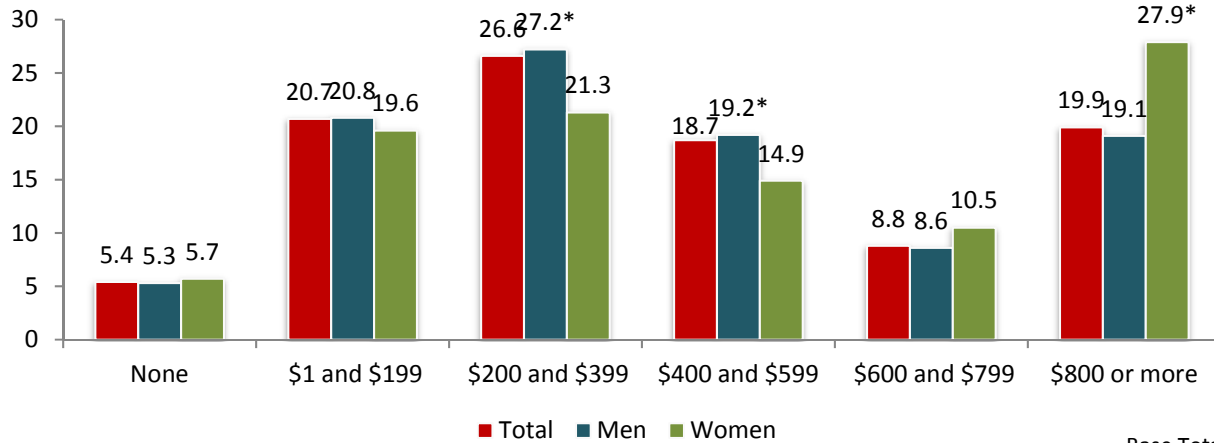


Base Total = 4,521
 Men = 4,066
 Women = 455

Q24. Do you expect to spend more, the same amount, or less on handguns for carry in the next 12 months as compared to the last 12 months? I expect to spend...

Respondents spent an average of \$513.50⁹ (median = \$300.00) on handgun ammunition and/or handgun reloading supplies. On average, women spent significantly more on ammo and reloading supplies (\$621.80) than men (\$501.40). Significantly more women (27.9%) reported spending in excess of \$800 on ammo and reloading supplies than men (19.1%)

Spend on Handgun Ammunition and Reloading Supplies in Past 12 Months (%)



Base Total = 4,521
 Men = 4,066
 Women = 455

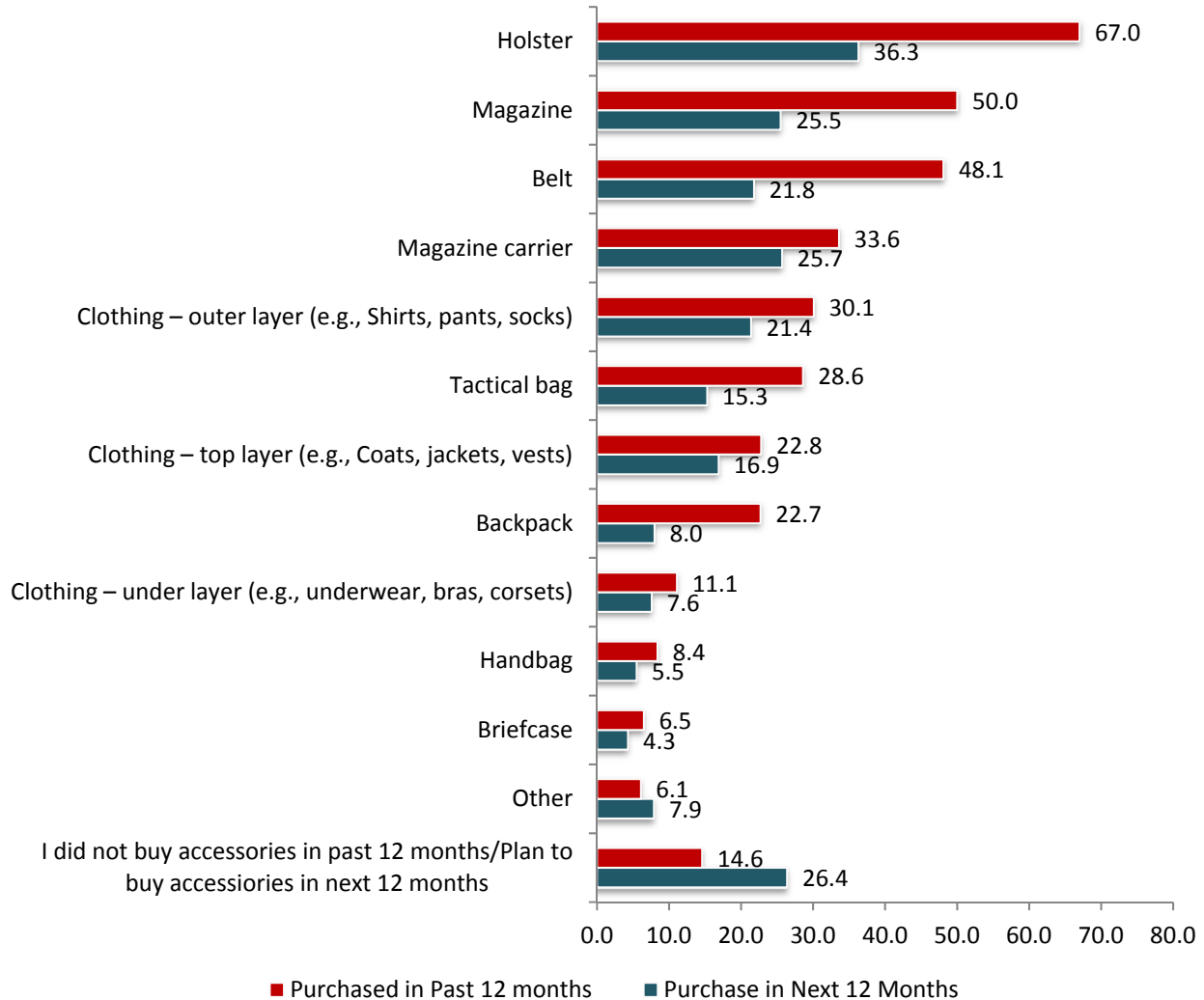
Q25. Approximately how much have you spent in the past 12 months on handgun ammunition and/or handgun ammunition reloading supplies?

By far, the most frequently purchased accessories for carry in the past 12 months were holsters. Two thirds (67.0%) of respondents purchased at least one holster. Magazines (50.0%) and belts (48.1%) were the second most frequently purchased carry accessories. A third of respondents purchased at least one magazine carrier (33.6%) and outer-layer clothing (30.1%). Only 14.6% of respondents did not purchase any carry equipment or accessories in the past 12 months.

Respondents anticipate buying fewer accessories in the coming 12 months. Holsters (36.3%), magazines (25.5%), magazine carriers (25.7%), belts (21.8%) and outer-layer clothing (21.4%) remain the most popular items but over a quarter (26.4%) of respondents indicate they have no plans to purchase equipment and accessories in the next 12 months.

⁹ The amount spent on handgun ammunition and/or reloading supplies in the past 12 months is underestimated. In Q25 respondents were provided with a drop-down box ranging from "I have not purchased any handgun ammunition in the past 12 months" to "\$2,000 or more". A small percentage (2.8%) of respondents indicated they spent \$2,000 or more on handgun ammunition and/or handgun reloading supplies in the past 12 months which indicates the average amount of \$496.40 is low.

Past and Future Purchase of Carry Accessories (%)



Q27. What accessories, if any, have you purchased specifically for carrying a handgun in the past 12 months?

Q27A. What accessories, if any do you plan to purchase in the next 12 months for carrying a handgun?

Base = 4,521

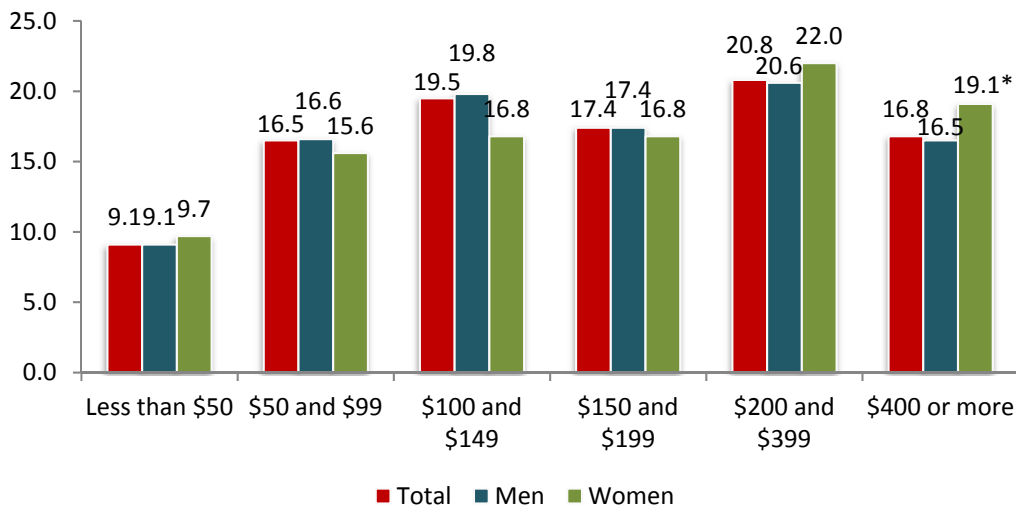
Men and women have similar accessory buying habits although they diverge in some very obvious ways. A large percentage of both men and women purchased holsters, magazines, belts and outer-layer clothing in the past 12 months although significantly more men purchased belts (48.6%) and outer-layer clothing (30.6%) than women (43.5% and 25.5%, respectively). Significantly more women purchased tactical bags (43.7%), under-layer clothing (19.8%) and concealed carry handbags (40.7%) than men (26.9%, 10.1%, and 4.8% respectively). A small percentage of men (6.8%) purchased concealed carry briefcases which was significantly more than women (4.0%).

Significantly more men indicated they intend to purchase holsters, magazines, belts, and magazine carriers than women in the next 12 months. Women intend to purchase more under-layer clothing and concealed carry handbags in the next 12 months.

Past and Future Purchase of Carry Accessories (%)				
	Purchased Past 12 Month		Anticipate Purchasing Next 12 Months	
	Men	Women	Men	Women
Holster	66.8	68.6	36.9*	31.6
Magazine	49.8	51.6	26.2*	18.9
Belt	48.6*	43.5	22.3*	17.1
Magazine carrier	33.6	33.2	26.5*	19.3
Clothing – outer layer (e.g., Shirts, pants, socks)	30.6*	25.5	21.4	21.3
Tactical bag	26.9	43.7*	15.4	13.8
Clothing – top layer (e.g., Coats, jackets, vests)	23.3	18.7	16.7	18.7
Backpack	23.0	19.3	8.0	7.9
Clothing – under layer (e.g., underwear, bras, corsets)	10.1	19.8*	6.7	15.2*
Briefcase	6.8*	4.0	4.4	3.5
Handbag	4.8	40.7*	4.4	15.6*
Other	5.8	8.6*	7.9	7.9
I did not buy any carry accessories in the past 12 months	14.9	11.2	26.5	25.5

On average, women (\$273.02) spent significantly more on accessories in the past 12 months than men (\$245.15). Significantly more women (19.1%) spent \$400 or more in the past 12 months than men (16.5%).

Spend on Carry Accessories in Past 12 Months (%)

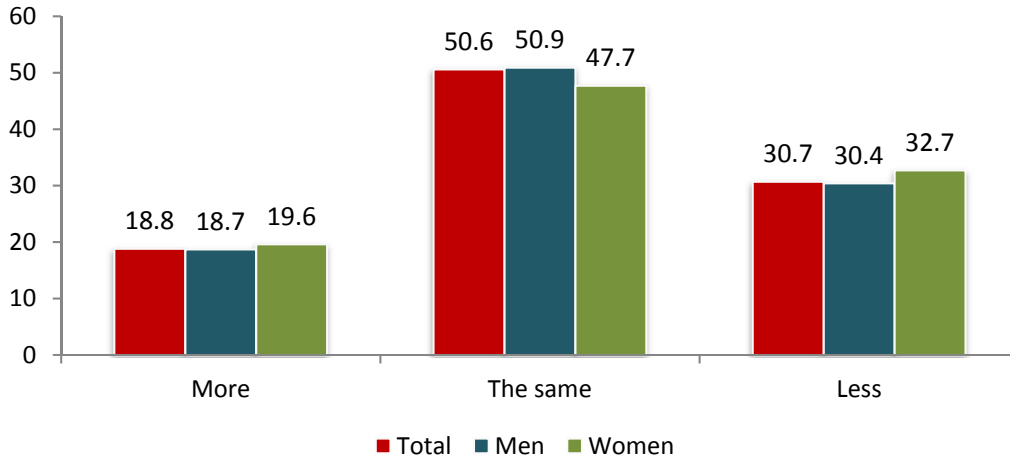


Q28. Approximately how much did you spend, in total, on accessories (not including firearms and ammunition) in the past 12 months specifically for carry?

Base Total = 4,521
Men = 4,066
Women = 455

Half of respondents (50.6%) anticipate spending the same amount on carry accessories in the next 12 months as they did in the past 12 months. A third (30.7%) expect to spend less on accessories and less than one in five (18.8%) anticipate spending more in the next 12 months. The trend in anticipated spend on accessories in the next 12 months is the same for men and women.

Anticipated Spend on Carry Accessories in Next 12 months (%)



Q29 Do you expect to spend more, the same amount, or less on carry accessories in the next 12 months as compared to the last 12 months? I expect to spend...

Base Total = 4,521
Men = 4,066
Women = 455

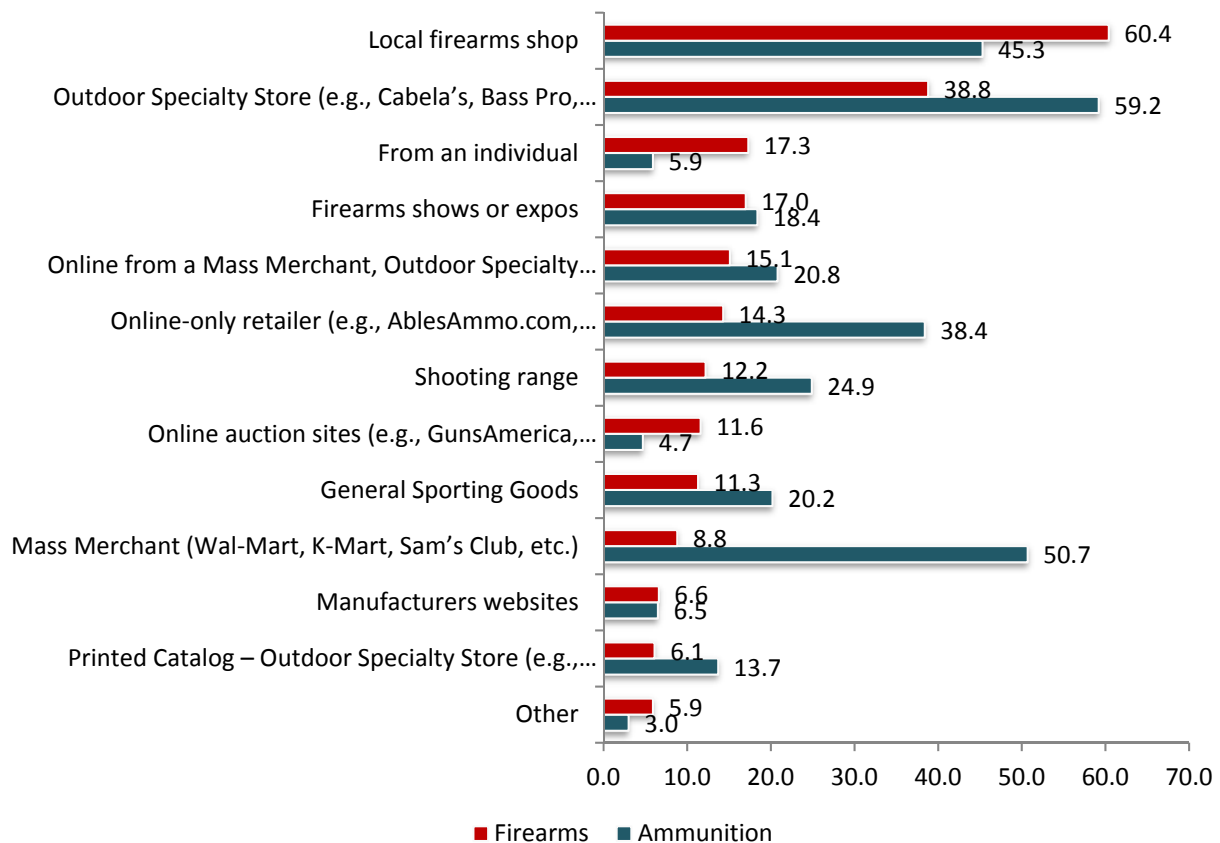
As one might expect there is a relationship between the frequency people carry a handgun and spend in the past 12 months on handguns, ammunition and carry equipment and accessories. This holds for both men and women although the relationship is much more pronounced among men. This may be a function of the differences in sample size since the spend does increase systematically for women as well as men.

Spend in Past 12 Months by Frequency of Carry					
		Never/Rarely/ Occasionally (a)	Sometimes (b)	Most of the Time (c)	Always (d)
Total	Handguns	\$784.89	\$826.14	\$843.96	\$977.92 ^{abc}
	Ammunition	\$396.06	\$437.54	\$493.47 ^{ab}	\$573.89 ^{abc}
	Accessories	\$184.74	\$210.27	\$242.27 ^{ab}	\$273.92 ^{abc}
Men	Handguns	\$794.64	\$842.51	\$836.49	\$975.39 ^{abc}
	Ammunition	\$372.86	\$428.11 ^a	\$480.17 ^{ab}	\$559.05 ^{abc}
	Accessories	\$177.56	\$210.67 ^a	\$238.91 ^a	\$268.73 ^{abc}
Women	Handguns	\$751.42	\$713.68	\$924.28	\$1,006.15

	Ammunition	\$481.52	\$507.41	\$634.23	\$743.27 ^{ab}
	Accessories	\$210.07	\$207.53	\$275.50	\$330.03 ^{ab}

Over half (60.4%) of respondents initiated the purchase of firearms from a local firearms shop and over a third (38/8%) purchased firearms from an outdoor specialty store. Retailer purchasing patterns differ considerably for ammunition as compared to firearms. Respondents purchased ammunition from a wider range of retailers. The majority of ammunition purchases took place at either outdoor specialty stores (59.2%) or mass merchants (50.7%). Respondents also purchased ammunition from local firearms shops (45.3%), online-only retailers (38.4%) and to a lesser extent, shooting ranges (24.9%).

Where Purchased Firearms and Ammunition (%)



Q30. From which of the following places have you initiated the purchase of firearms and/or purchased ammunition? Check all that apply.

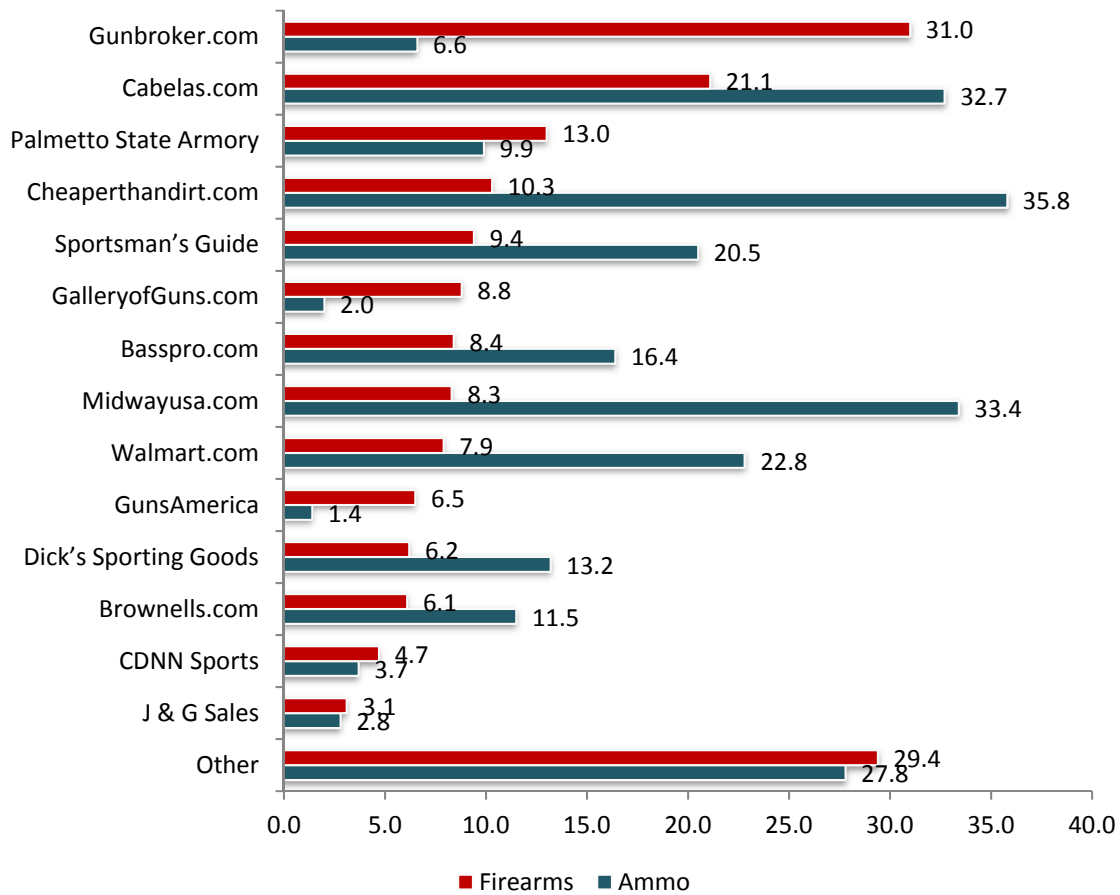
Firearms Base = 4,521
Ammunition Base = 4,521

Men and women have similar preferences for firearms and ammunition retailers with a few notable differences. Men use online-only retailers significantly more frequently for both firearms (15.1%) and ammunition (39.3%) than women (7.9% and 30.5%, respectively). Women will purchase firearms (18.9%) and ammunition (33.2%) at a shooting range as compared to men (11.4% and 23.9%, respectively).

Places Purchased Firearms and Ammunition in Past 12 Months (%)				
	Firearms		Ammunition	
	Men	Women	Men	Women
Local firearms shop	60.5	60.0	45.6	42.9
Outdoor Specialty Store (e.g., Cabela's, Bass Pro, Gander Mountain)	39.3	34.7	59.3	58.2
From an individual	17.3	17.4	6.1	4.4
Firearms shows or expos	16.9	18.0	18.6	16.7
Online from a Mass Merchant, Outdoor Specialty Store, General Sporting Goods Store, or a local gun shop	15.4	12.7	20.7	21.8
Online-only retailer (e.g., AblesAmmo.com, CheaperThanDirt.com, Impactguns.com)	15.1*	7.9	39.3*	30.5
Online auction sites (e.g., GunsAmerica, Gunbroker.com)	11.9	9.2	5.0*	2.2
General Sporting Goods	11.5	10.1	20.2	20.7
Shooting range	11.4	18.9*	23.9	33.2*
Mass Merchant (Wal-Mart, K-Mart, Sam's Club, etc.)	9.2*	4.8	51.0	47.5
Manufacturers websites	6.5	7.0	6.2	9.5*
Printed Catalog – Outdoor Specialty Store (e.g., Cabela's, Bass Pro)	6.4*	3.5	14.1*	10.1
Other	5.7	7.9	2.9	3.3

Approximately a third (31.5%) of respondents purchased firearms and slightly less than half (47.9%) purchased ammunition online. By far, the two most popular online retailers for purchasing firearms are Gunbroker.com (31.0%) and Cabelas.com (21.1%). Respondents buy ammunition from a number of different online retailers including Cheaperthandirt.com (35.8%), Midwayusa.com (33.4%), Cabelas.com (32.7%), Walmart.com (22.8%) and Sportsman's Guide (20.5%).

Where Initiated Purchase of Firearms and Ammunition Online (%)



Q31. From which of the following online retailers have you initiated the purchase of firearms and/or purchased ammunition? Check all that apply.

Firearms Base = 1,425
Ammunition Base = 2,167

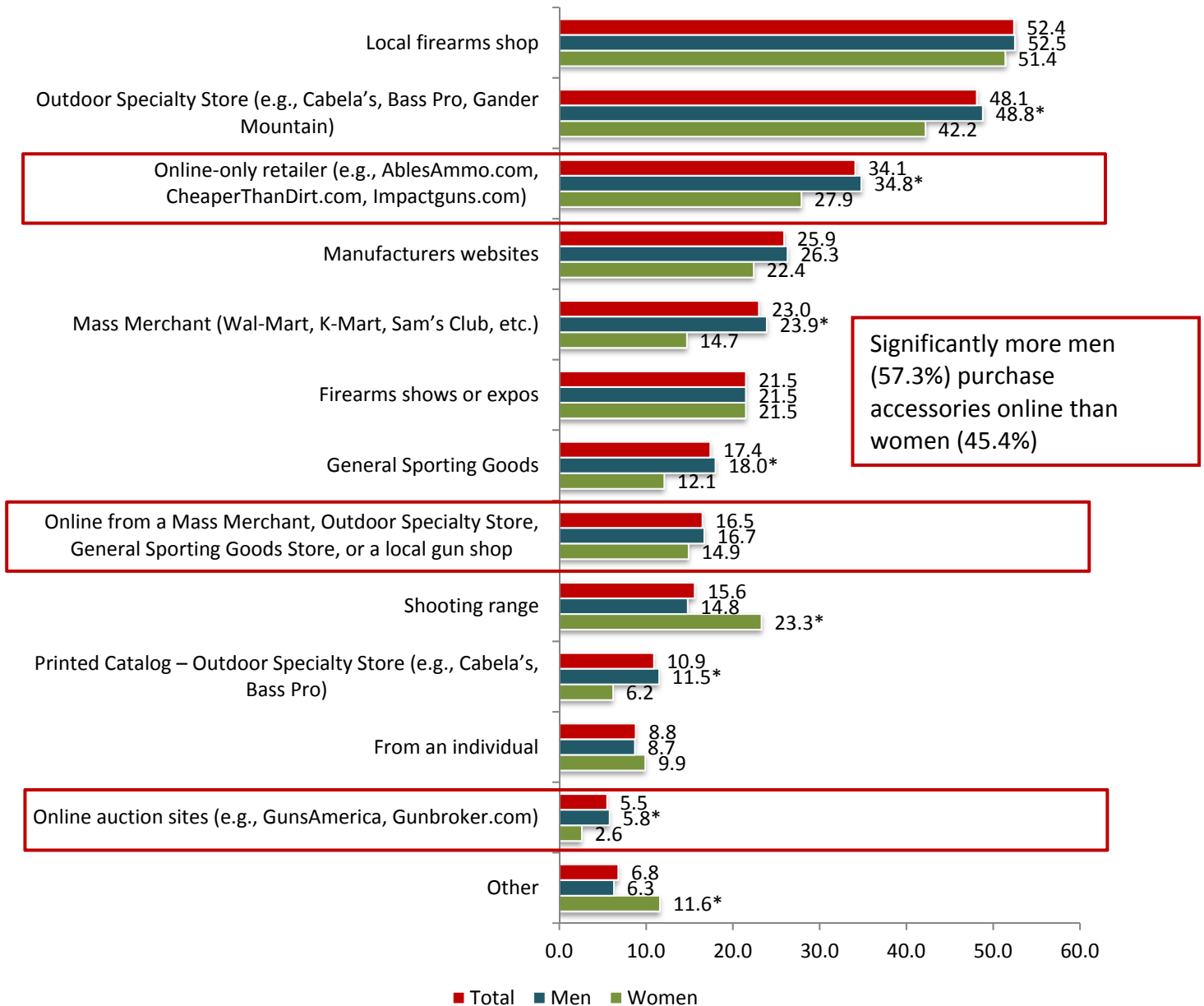
More men (32.5%) initiate the purchase of firearms online than women (23.1%) and more men (48.7%) than women (41.7%) also buy ammunition online. Men and women tend to shop at the same online retailers for firearms but diverge significantly when buying ammunition. More men purchase ammunition from Cabelas.com, Cheaperthandirt.com, Sportsman's Guide and CDNN than women. Women tend to prefer lesser known online retailers.

Purchases Initiated Online of Firearms and Ammunition (%)				
	Firearms		Ammunition	
	Men	Women	Men	Women
Gunbroker.com	30.6	36.2	6.9	4.3
Cabelas.com	21.7	14.3	33.8*	21.6
Palmetto State Armory	13.3	8.6	10.1	7.6
Cheaperthandirt.com	10.5	8.6	36.5*	27.6
Sportsman's Guide	9.8	4.8	21.1*	13.5

GalleryofGuns.com	9.2	3.8	2.1	1.1
Midwayusa.com	8.7*	2.9	34.0	27.6
Basspro.com	8.6	5.7	16.7	13.5
Walmart.com	8.2	4.8	23.4	17.3
GunsAmerica	6.6	4.8	1.5	0.5
Brownells.com	6.4	2.9	11.7	10.3
Dick's Sporting Goods	6.2	6.7	13.7	8.6
CDNN Sports	4.8	3.8	4.0*	0.5
J & G Sales	3.0	3.8	3.0	1.1
Other	28.9	36.2	26.5	41.6*

Over half (52.4%) of respondents purchase their carry accessories at local firearms shops and slightly less than half (48.1%) purchase their accessories at outdoor specialty stores. Significantly more men (57.3%) purchase carry accessories online than women (45.4%) and more women (23.3%) will purchase accessories at a shooting range than men (14.8%).

Where Purchased Firearms and Carry Accessories (%)



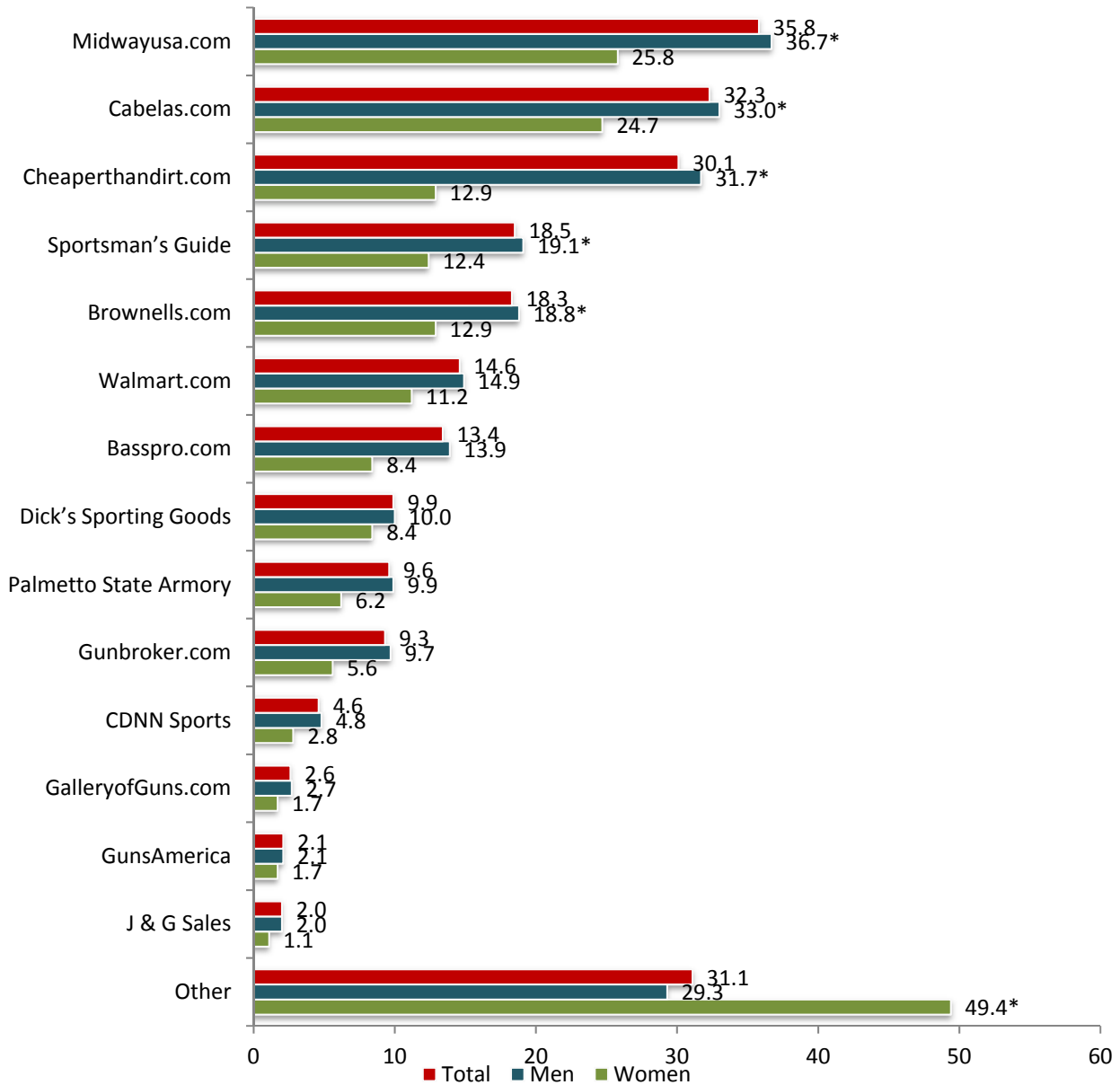
Base Total = 4,521
 Men = 4,066
 Women = 455

Q32. From which of the following places have you purchased **firearms and carry accessories** (not including firearms and/or ammunition)? Check all that apply.

Midwayusa.com (36.1%), Cabelas.com (32.4%) and Cheaperthandirt.com (31.1%) are the most popular online retailers for firearm and carry accessories. Significantly more men buy accessories at online-only retailers – Midwayusa 36.7%), Cheaperthandirt (31.7%), Sportsman's Guide (19.1%) and Brownells (18.8%) than women (25.8%, 12.9%, 12.4% and 12.9%, respectively). However, half (49.4%) of women make purchases from lesser known online retailers. A number of online retailers have appeared recently that cater specifically to women's apparel and accessory needs and women are tapping into

these retailers for underlayer clothing, handbags and other items that are not readily available elsewhere.

Where Purchased Firearms and Carry Accessories Online (%)

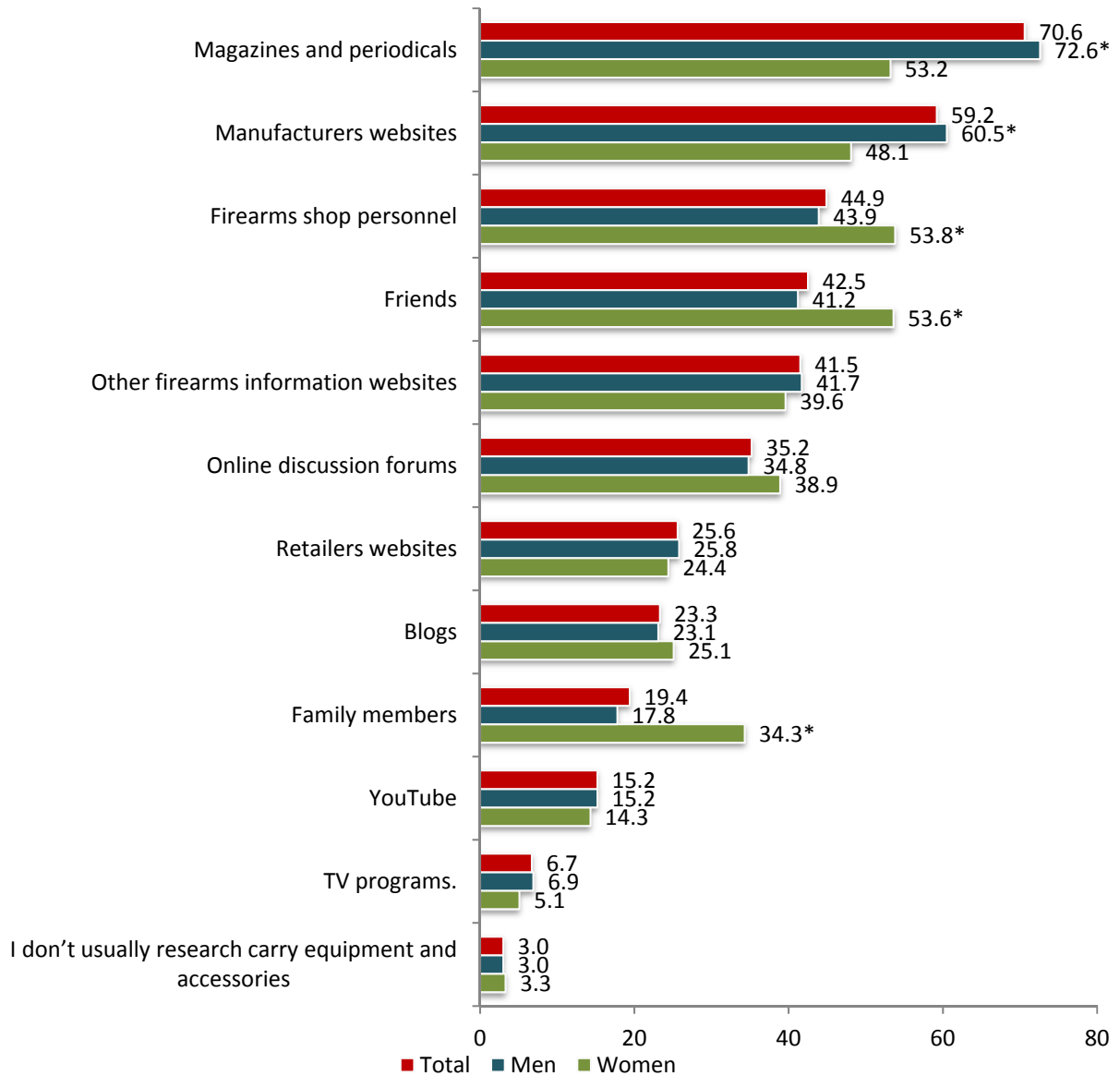


Base Total = 2,040
 Men = 1,862
 Women = 178

Q33. From which of the following online retailers have you purchased *firearms and carry accessories* (not including firearms and/or ammunition)? Check all that apply.

Nearly all respondents consult one or more resources to obtain information pertaining to carry equipment and accessories. Women tend to favor a more personal touch through firearms shop personnel (53.8%), friends (53.6%) and family (34.3%) while men prefer magazines and periodicals (72.6%) and manufacturers websites (60.5%).

Sources of Information to Research Carry Equipment and Accessories (%)



Q34. What sources of information do you use, if any, to research carry equipment and accessories?
 Check all that apply.

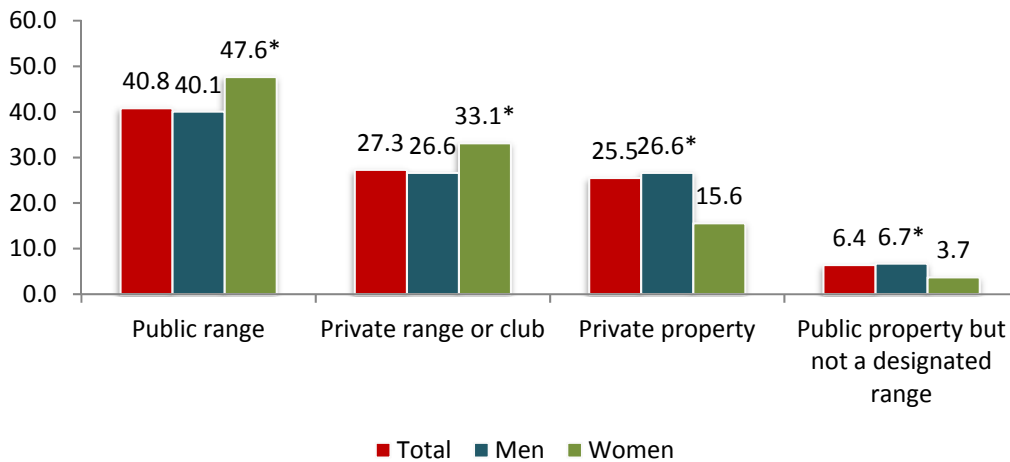
Base Total = 4,521
 Men = 4,066
 Women = 455

Club and Organization Memberships

More respondents use their handguns at a public range an average of 40.8% of the time making it the most popular place to shoot handguns among the options. Private ranges and clubs were second most frequented, averaging 27.3% of the time and a quarter of respondents (27.3%) shoot on private property.

Both men and women prefer to shoot at a range or club but significantly more women prefer to shoot at a public range (47.6%) or private range or club (33.1%) than men (40.1% and 26.5%, respectively).

Average Percent of Time Using Handguns at Various Locations (%)

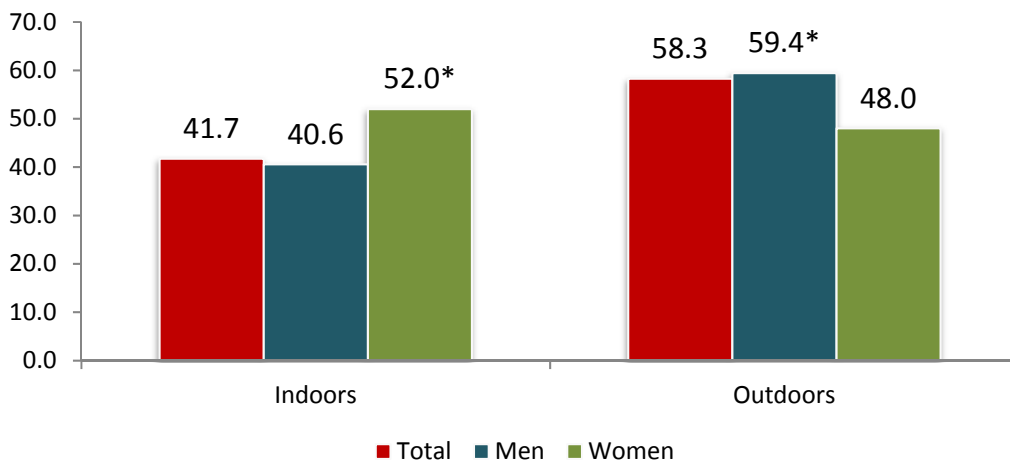


Base Total = 4,521
Men = 4,066
Women = 455

Q35. What percentage of the time do you shoot your handguns at each of the following locations?

On average, women prefer to shoot indoors while men prefer to shoot outdoors. Slightly over half of women prefer to shoot indoors (52.0%) while well over half of men (59.4%) prefer to shoot outdoors.

Average Percent of Time Shooting Indoors vs. Outdoors (%)



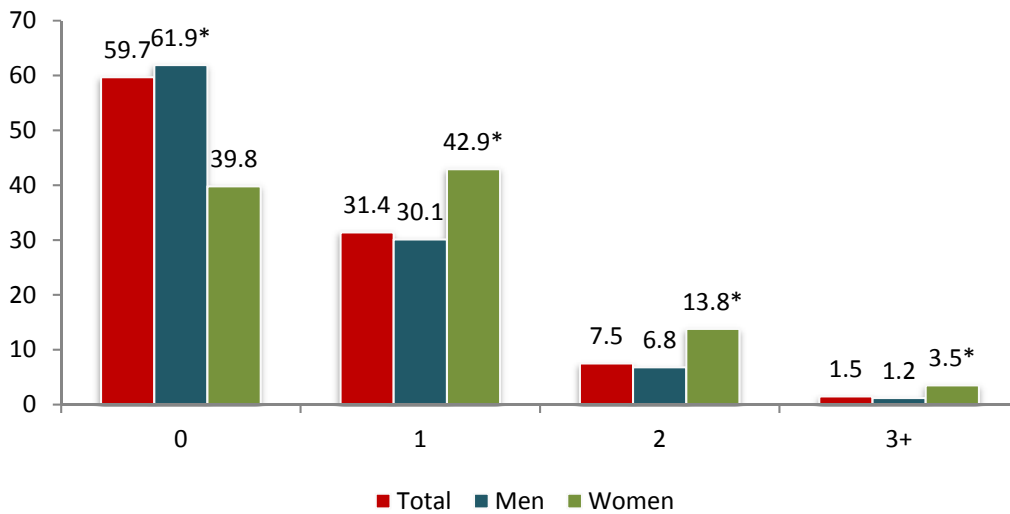
Base Total = 4,521
Men = 4,066
Women = 455

Q36. What percentage of the time do you shoot your handguns indoors and what percentage of the time do you shoot your handguns outdoors

The majority of respondents (59.7%) do not belong to any clubs that have a pistol range. A little less than a third (31.4%) belong to one club with a pistol range and only 9.0% belong to 2 or more clubs.

Women, in our sample, belong to significantly more shooting clubs with a pistol range than men although given that the majority of women in our sample are members of A Girl and A Gun, this is not surprising. However, significantly more women (17.3%) belong to two or more clubs than men (8.0%).

Memberships to Shooting Clubs with Pistol Range (%)

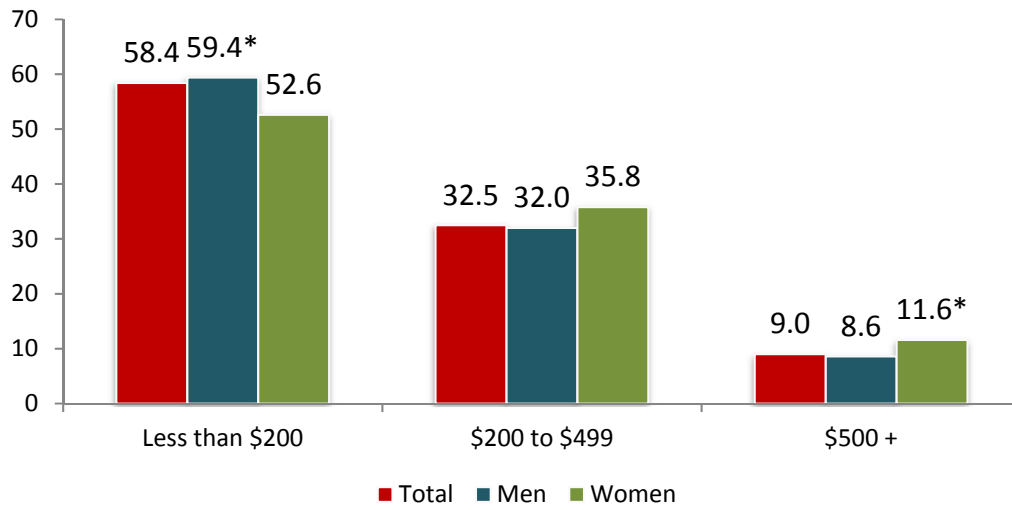


Base Total = 4,521
 Men = 4,066
 Women = 455

Q37. How many shooting clubs with a pistol range do you personally belong to?

It is not surprising that on average, women (\$286.31) spent significantly more on shooting club memberships in the past 12 months than men (\$241.28) since women belong to more clubs than men.

Spend in Past 12 months for Memberships (%)



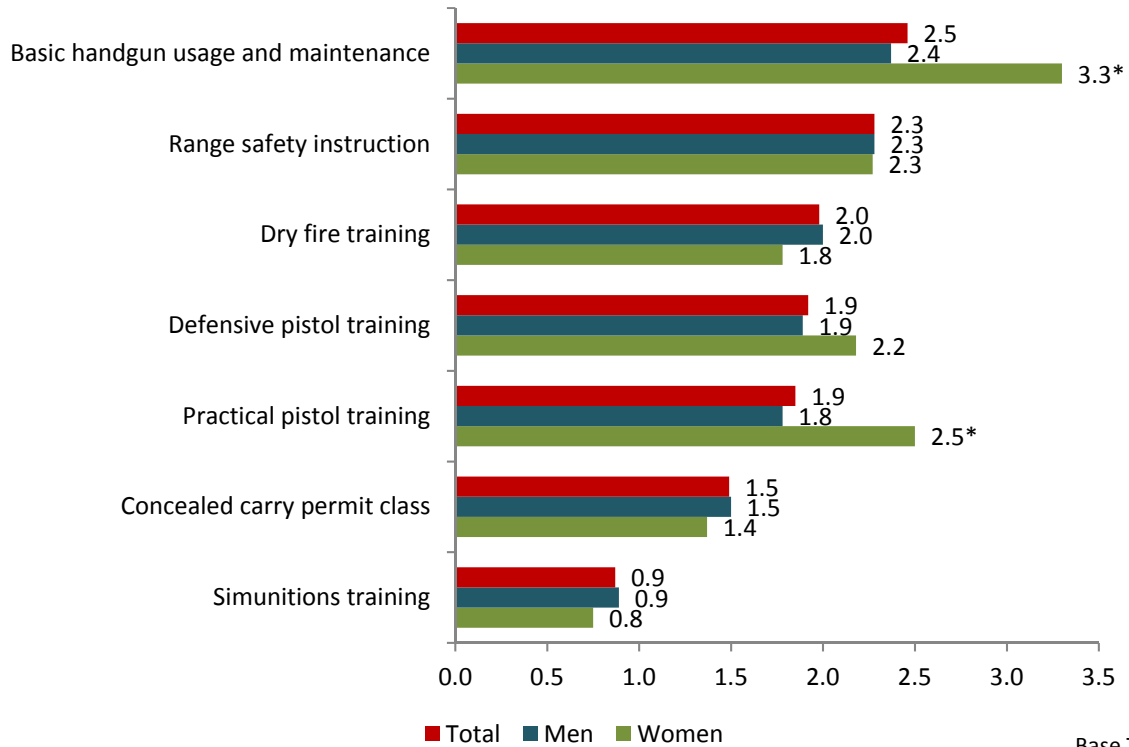
Q38. Approximately how much, in total, have you paid in membership dues and fees to shooting clubs with a pistol range in the past 12 months?

Base Total = 1,823
 Men = 1,549
 Women = 274

Training

On average, respondents took a total of 12.9 (median = 6) training classes or sessions. The most popular classes overall are basic handgun usage and maintenance, range safety instruction, and dry fire training. Women have had significantly more classes/sessions on average (mean = 14.1, median = 9.0) than men (mean = 12.7, median = 6.0). Women took significantly more basic handgun usage and maintenance classes (3.3) and practical pistol training (2.5) than men (2.4 and 1.8, respectively).

Average Number of Training Classes/Sessions

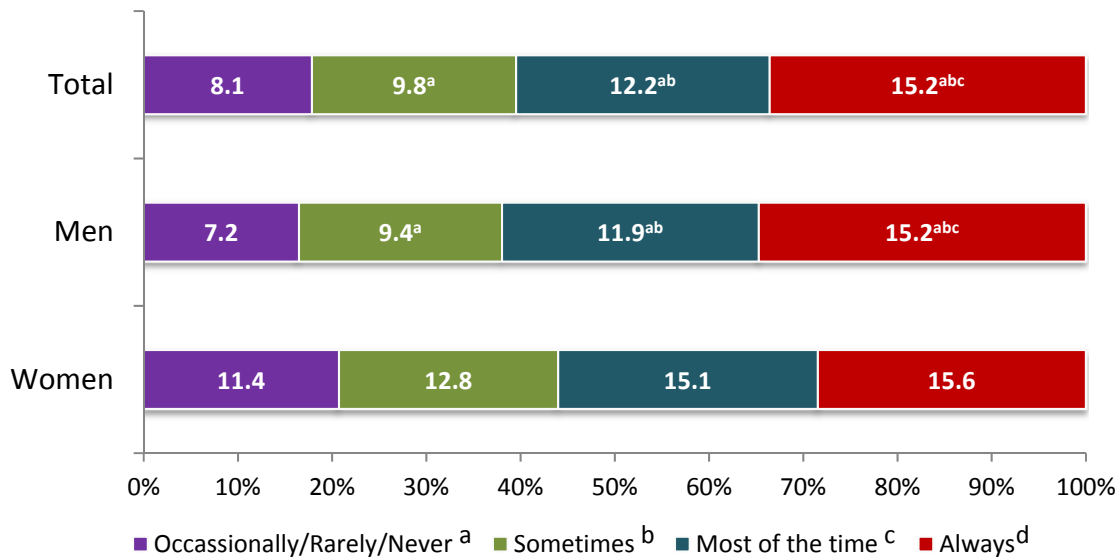


Base Total = 4,521
 Men = 4,066
 Women = 455

Q40. How many classes or training sessions, if any, have you had in each of the following activities?

There is a correlation between the frequency someone carries a firearm and the amount of training they have had. The more frequently someone carries a firearm the more training they tend to have. This is a very strong trend among men but less so among women. Women tend to seek out training and it does not appear to be necessarily a function of their desire to carry a firearm.

Average Number of Classes by Frequency of Carry

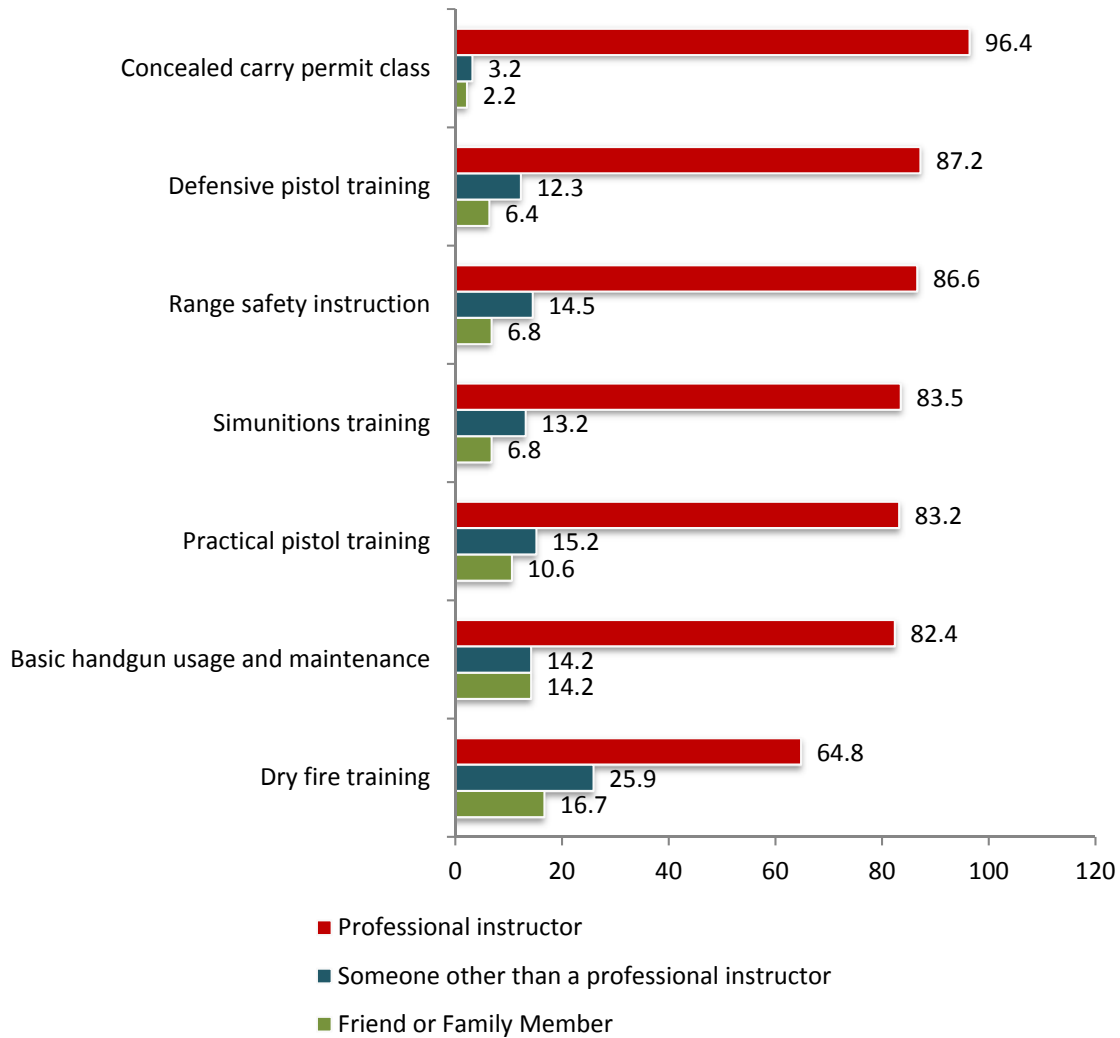


The more classes someone takes, the more they tend to spend on handguns, ammunition and equipment and accessories. Clearly, spend on handguns increases steadily with an increase in the number of classes individuals take. However, spend on ammunition and accessories appears to plateau at 20 classes.

Average Spend by Number of Classes			
	Handguns	Ammunition	Accessories
Less than 5 classes	\$829.00	\$411.85	\$201.88
5 to 9 classes	\$831.81	\$519.09	\$238.20
10 to 14 classes	\$913.55	\$592.56	\$267.67
15 to 19 classes	\$917.39	\$549.82	\$280.36
20 to 29 classes	\$1,045.91	\$657.27	\$319.97
30 or more classes	\$1,161.09	\$624.01	\$315.84

With the exception of dry fire training, the overwhelming majority of respondents took training classes and/or sessions taught by a professional instructor. Most of those who took dry fire training (64.8%) took it with a professional instructor. However, 42.6% took dry fire training from someone other than a professional instructor.

Who Taught Classes or Sessions (%)



Q41. Who have you taken a class or instruction with? Check all that apply.

Bases vary

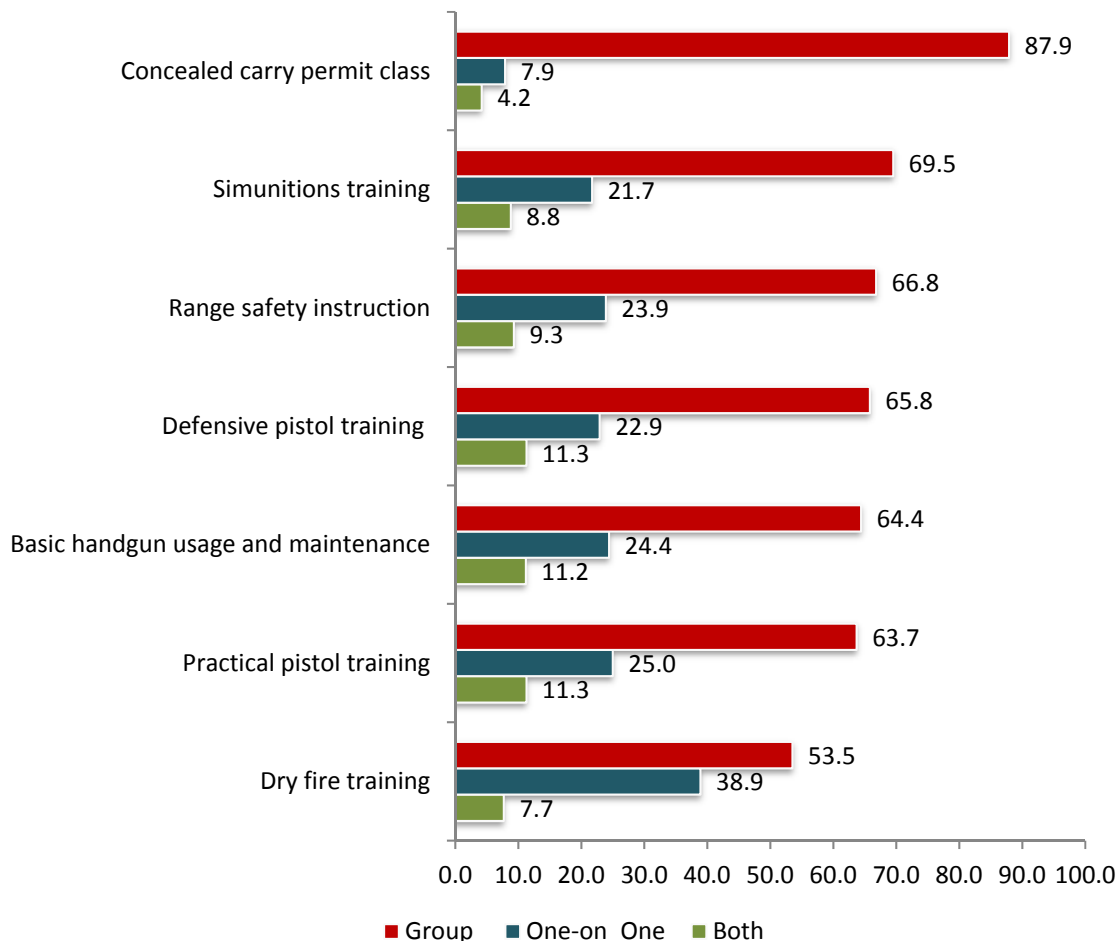
Significantly more women take instruction from professional instructors than men across the board except for concealed carry permit classes where it is typically mandated that training be provided by certified instructors to obtain a permit.

Who Taught Classes or Sessions						
	Professional Instructor		Someone Else		Friend or Family	
	Men	Women	Men	Women	Men	Women
Concealed carry permit class	96.4	96.6	3.3	2.2	2.1	2.9
Defensive pistol training	86.2	94.8*	13.2*	5.6	6.2	8.2

Range safety instruction	86.1	91.3*	15.0*	10.6	6.4*	10.6
Simunitions training	82.5	90.8*	14.0	7.6	6.9	5.9
Practical pistol training	82.0	91.1*	16.4*	7.7	9.9*	15.4
Basic handgun usage and maintenance	81.5	88.7*	14.8	9.2	13.4*	20.0
Dry fire training	62.5	81.8*	28.2*	9.9	16.1	20.6

The majority of respondents have taken their training in a group setting especially concealed carry training where 87.9% of those who have taken concealed carry classes took them in a group setting. Two thirds of respondents took each of the other types of training in a group setting with the exception of dry fire training where slightly over half (53.5%) took training in a group setting. The majority of respondents take their training either in a group or one-on-one but not both.

Training Setting (%)



Q42. Was your training one-on-one, in a group setting or both? Check all that apply.

Bases vary

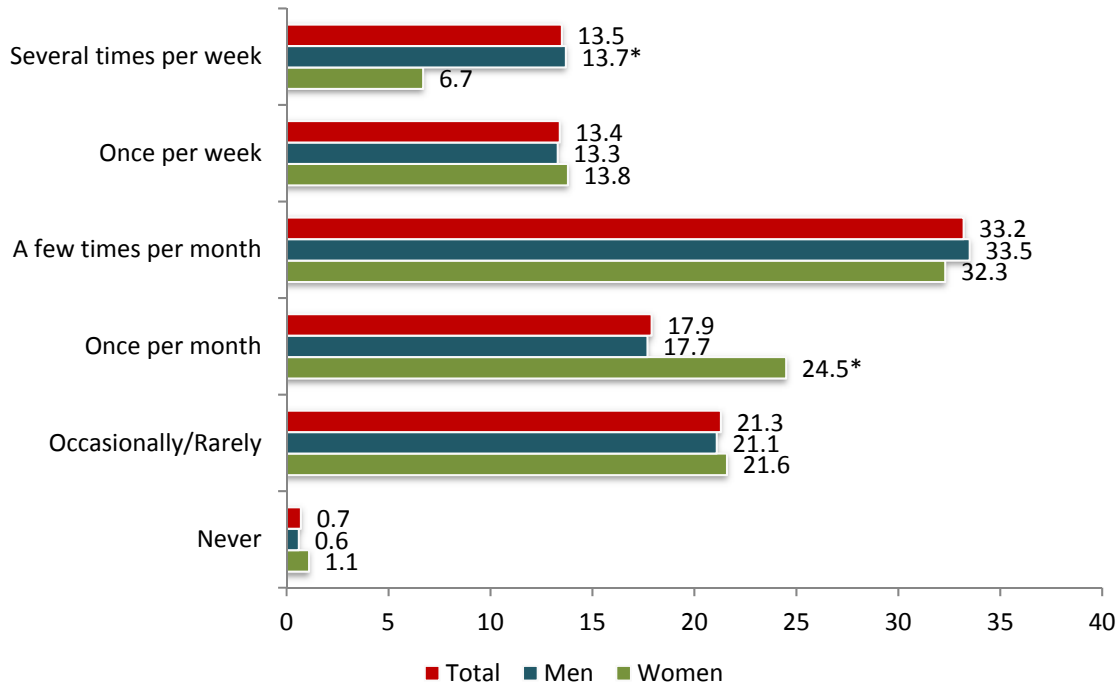
Both men and women take the majority of their training in a group setting but significantly more women take training in a group setting than men. There may be many reasons why women choose to take

training in a group setting more frequently than men but women tend to favor social situations relative to men. Women take more training than men and are willing to try both one-on-one and group setting training more frequently than men.

Training Setting						
	Group		One-on-One		Both	
	Men	Women	Men	Women	Men	Women
Concealed carry permit class	87.7	89.6	8.1	6.8	4.3	3.6
Simunitions training	67.8	81.5*	23.4*	9.2	8.8	9.2
Defensive pistol training	65.0	71.4*	24.3*	12.3	10.7	16.4*
Basic handgun usage and maintenance	65.6*	55.4	24.5	23.6	9.9	21.0*
Range safety instruction	66.1	72.1*	24.9*	15.4	8.9	12.5*
Practical pistol training	63.9	62.2	26.0*	18.8	10.1	19.1*
Dry fire training	52.5	60.1*	40.3*	28.9	7.2	11.1*

Nearly two-thirds (60.1%) of those who took defensive pistol training practice what they learned in their training a few times per month or more frequently. Significantly more men (13.7%) than women (6.7%) practice several times per week while significantly more women (24.5%) than men (17.7%) practice once per month.

Frequency of Defensive Pistol Training Practice (%)

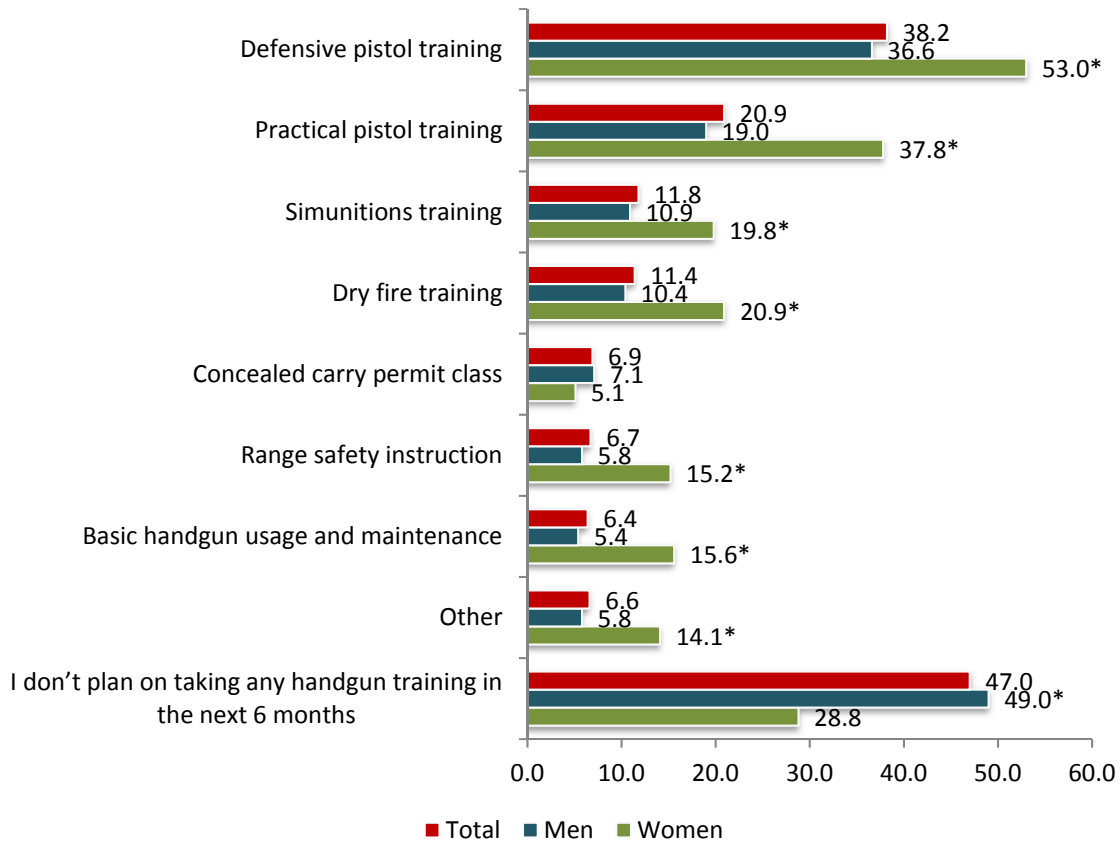


Base Total = 2,374
 Men = 2,105
 Women = 269

Q45. You indicated that you have taken defensive pistol training. How frequently do you practice what you have learned in your training?

Women are more interested in continued handgun training than men across the board for nearly all of the different handgun activities. Nearly three-quarters (71.2%) of women indicated they intended to take some form of training in the next six months. In contrast, half of men (49.0%) indicated they had no plans to take handgun training in the next six months. Over half of women (53.0%) intend to defensive pistol training and a third (37.8%) intend to take practical pistol training.

Planned Handgun Training Next 6 Months (%)



Base Total = 4,521
 Men = 4,066
 Women = 455

Q43. What handgun training, if any, do you expect to take in the next six months?

Half (50.9%) of respondents indicate that they do intend to take more training but not in the next six months. A third of respondents (31.7%) felt they needed practice and not more training. Time (19.9%) and money (16.2%) are also limiting factors preventing respondents from seeking more training in the next six months. Interestingly and somewhat remarkably, given all of the differences between the sexes, there is no significant difference in the distribution of excuses for not training.

Reasons For Not Planning Training in Next 6 Months (%)



Base Total = 2,123
 Men = 1,992
 Women = 131

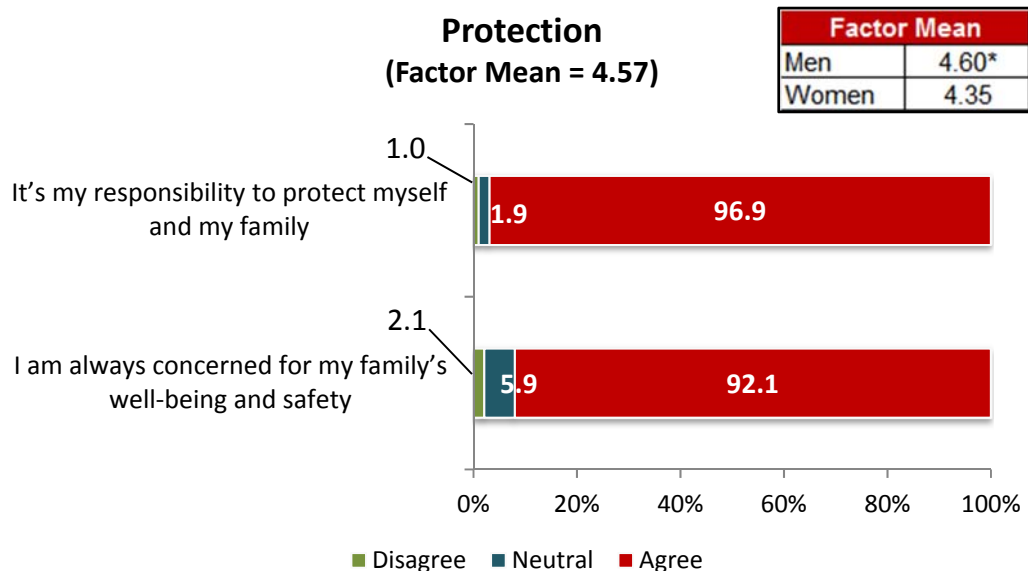
Q44. Why aren't you planning to take any training in the next 6 months?

Attitudes and Opinions Regarding Preparation, Personal Safety and Protection, and Knowledge

Respondents were asked to react to 17 statements to evaluate their attitudes and opinions on several relevant topics by indicating their level of agreement or disagreement with each statement.¹⁰ The statement ratings were then statistically analyzed to develop groupings representing similar concepts. A total of six multi-item concepts (factors) were identified along with four statements that did not combine with others representing individual concepts. A factor mean score is created by summing across the individual responses on each statement and creating an average. The factor mean indicates respondent’s level of agreement of each concept as a whole. The factors are listed here by factor mean score (highest to lowest).

Not surprisingly the vast majority of respondents feel very strongly that it is their responsibility to protect themselves and their family. Overwhelmingly respondents indicated that concern for the safety and security of themselves and their family was always top of mind.

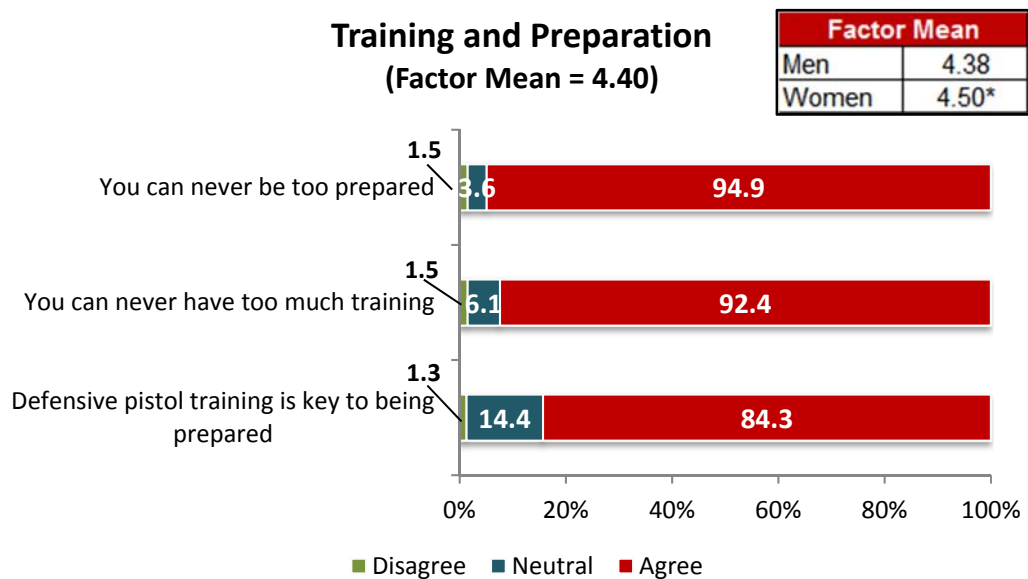
Both men and women feel very strongly about protecting themselves and their family but men feel significantly more strongly about protection than women. This is not at all surprising. Women are taking steps to be self-sufficient in their ability to defend themselves and their families but it is instilled in men from an early age that men are primarily responsible for protecting their families and assuring their safety and well-being.



¹⁰ A 5-point Likert-type scale was used to ascertain agreement with statements. The scale points were 1 = Strongly Disagree, 2 = Disagree, 3 = Neither Agree or Disagree, 4 = Agree, and 5 = Strongly Agree. The Top-2 Box Percentage refers to the percentage of respondents who agree or strongly agree with a statement. The center is represented by respondents who indicated they neither agree nor disagree with a statement. The Bottom-2 Box Percentage is the percentage of respondents who disagree or strongly disagree with a statement.

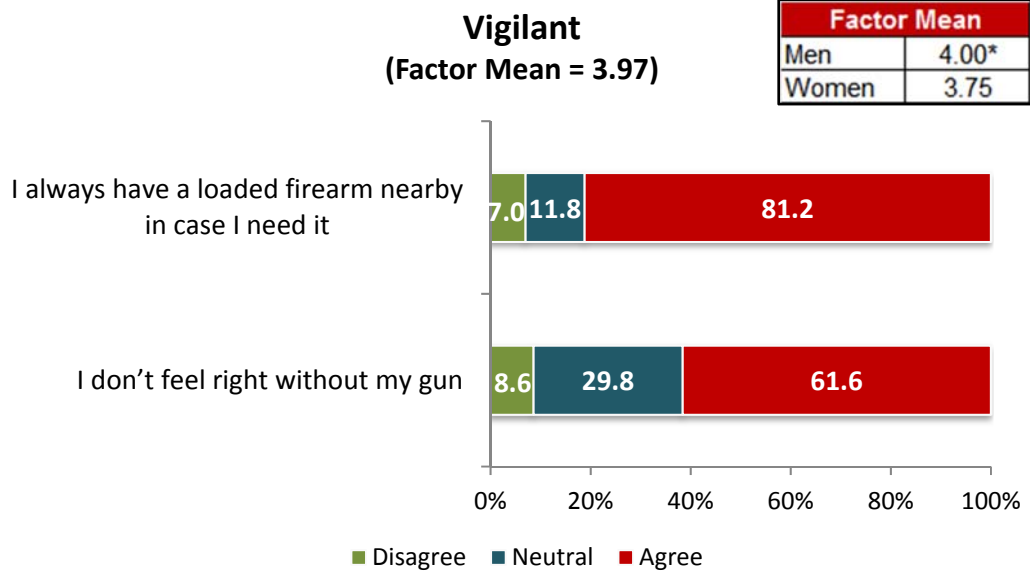
Respondents feel very strongly that training and preparation is important for defense. In particular, 84.3% of respondents felt that defensive pistol training was very important in being prepared to defend one’s family and self.

Although both men and women feel strongly that training and preparation are essential, women feel more strongly than men about this. This is highly consistent with earlier findings. On average, Women have had more training than men and will continue to pursue training whereas men will stop pursuing training much sooner.



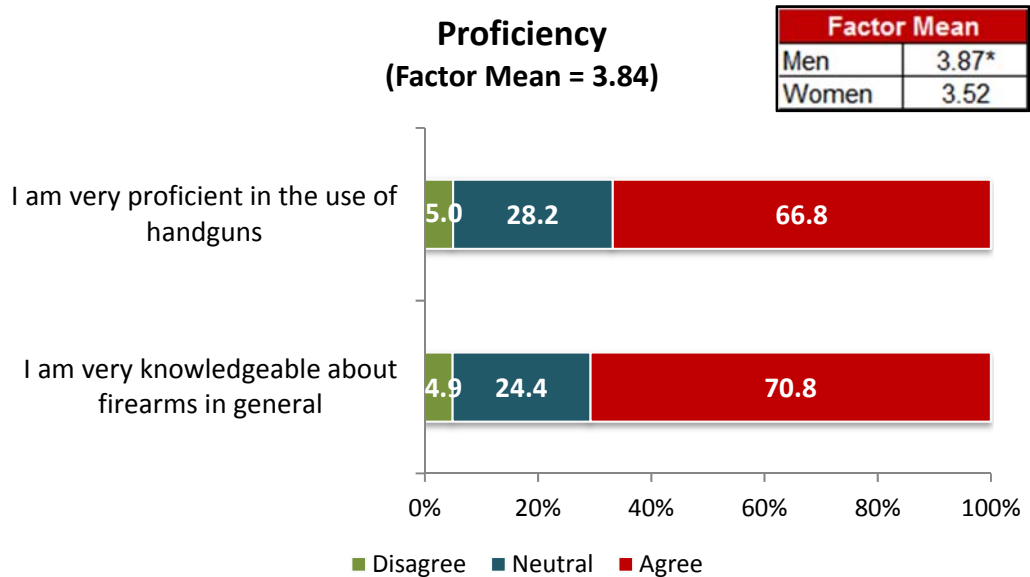
The overwhelming majority of respondents (81.2%) indicated that they always have a loaded firearm nearby but less than two thirds (61.6%) indicated that they “don’t feel right” without their firearm. Although respondents seem to feel more secure with a loaded firearm somewhere within reach, they are not necessarily willing to carry a firearm all the time. This appears to be consistent with earlier findings regarding respondents’ frequency of carry.

Men feel considerably more strongly than women regarding the need for vigilance.



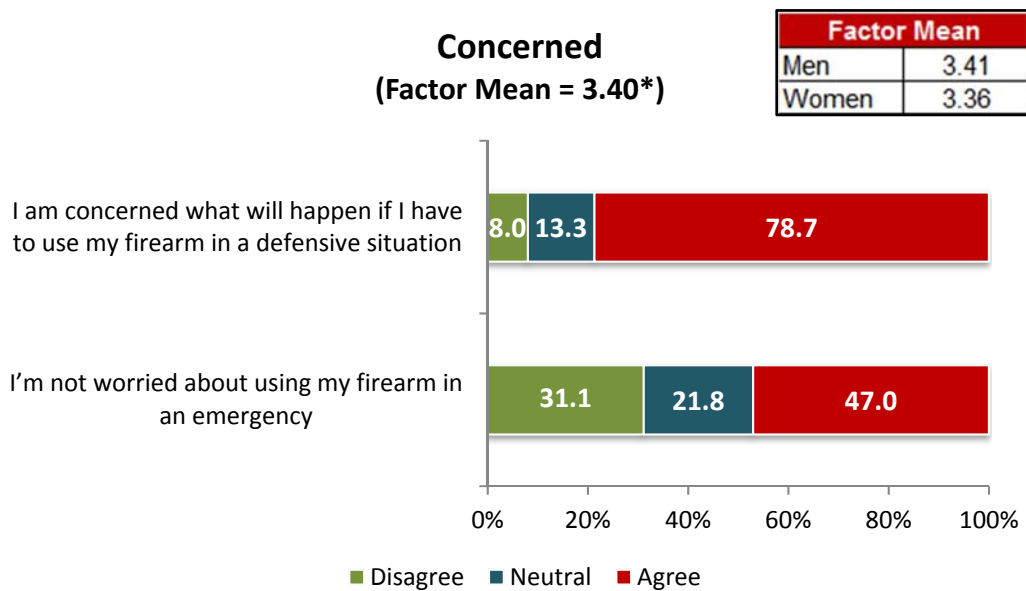
The majority of study participants are confident in their knowledge and skill with firearms. Two thirds (66.8%) of respondents feel confident in their proficiency with handguns and 70.8% feel confident in their knowledge of firearms in general.

Men feel significantly more proficient in their knowledge and use of handguns than women. This is not surprising and provides some explanation for the differences in the amount and pursuit of training between men and women. Men are more confident in their knowledge and ability to use handguns than women. Women compensate for their perceived lack of handgun proficiency by continually training. Men, on the other hand, are more confident in their proficiency and do not feel the need to seek additional training.



Clearly, respondents are concerned about the implications of using a firearm in a defensive situation. Over three quarters (78.7%) of respondents indicated that they were very concerned. Less than half (47.0%) indicated they were not worried about using their firearm in an emergency although slightly less than a third (31.1%) indicated they were worried. This is not surprising since USCCA membership benefits include coverage for legal and other expenses should it be necessary to use your firearm in a defensive situation. Given that the majority of respondents in this study are USCCA members it follows that they are concerned about the aftermath of a situation that includes the discharge of their firearm.

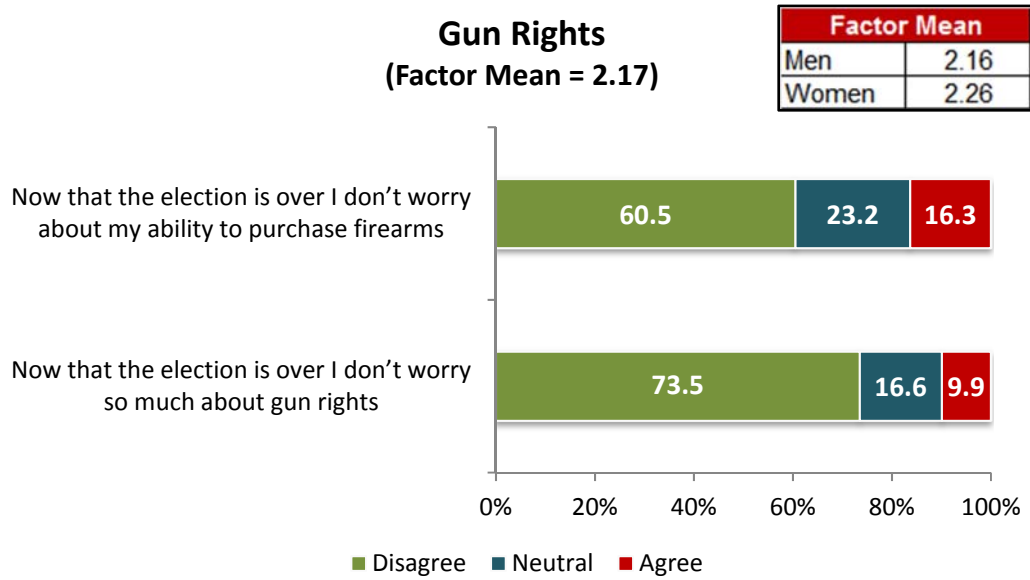
Both men and women are equally concerned about the need and ramifications of having to use their firearm in a defensive situation.



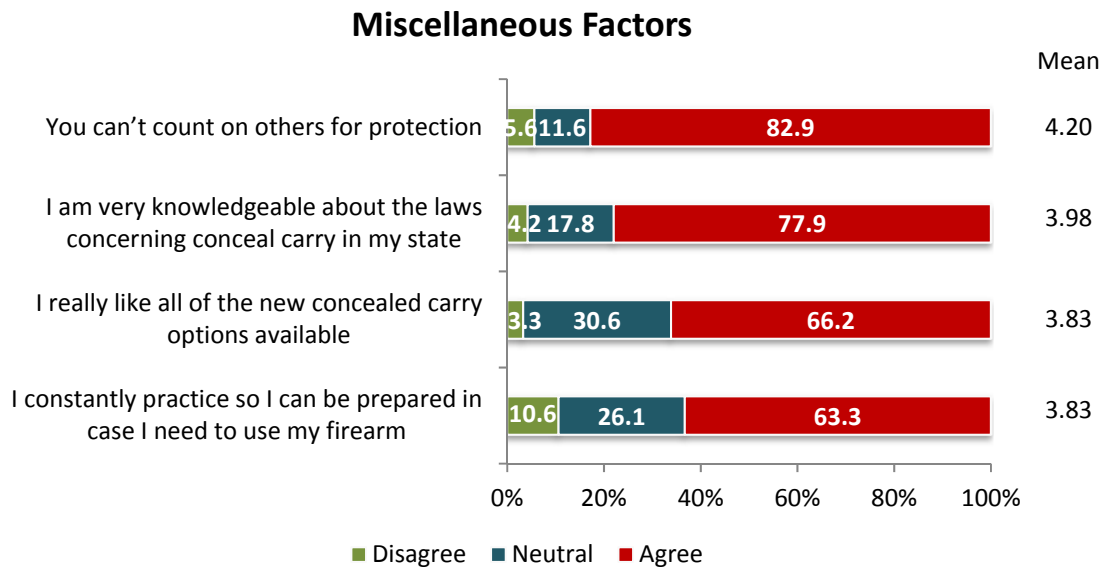
*The statement “I’m not worried about using my firearm in an emergency.” expresses a lack of concern or worry which is reversed from the first statement that expresses concern over the use of a firearm in a defensive situation. To generate a factor mean score that represents agreement between the two statements, the second statement’s coding was reversed so that the mean expresses a level of concern or worry that is consistent for both statements.

It appears that the 2016 election has not alleviated the anxiety of many gun owners regarding gun rights or the ability to buy firearms. Nearly two thirds (60.5%) of respondents indicated that they remain worried about their ability to purchase firearms although the election was favorable for firearms policy. And nearly three quarters (73.5%) of respondents remain worried about their second amendment rights.

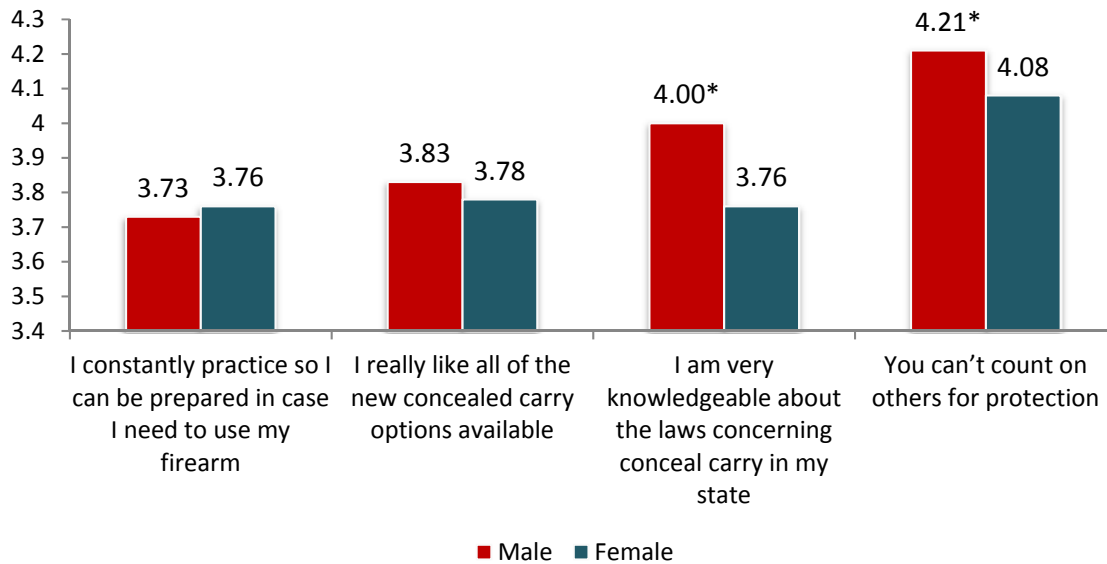
Men and women are equally concerned about their gun rights irrespective of the election.



As seen earlier, respondents feel strongly about self-reliance when it comes to protecting oneself and family. We also saw earlier that men feel more strongly than women about this. Respondents also feel confident in their knowledge about state laws governing conceal carry. Again, men are persistently more confident in their knowledge than women. Roughly two thirds of respondents like the concealed carry options that are currently available and also feel the need to practice continually to remain prepared. There is little difference between men and women when it comes to liking the available carry options or the need to practice.



Miscellaneous Factor Mean Scores



Key Subgroup Profiles

The following provides a snapshot of responses to select questions broken-out by key subgroups for comparison purposes. The items listed are only those that exhibit statistically significant ($\alpha = .05$) differences between groups unless otherwise noted. The highest value among subgroups is highlighted in blue. For subgroups with more than two categories, differences between subgroups are denoted by column letters. Certain categories such as average number of guns purchased and average spend are provided regardless of statistical significance because of their importance. If an item that does not have significant differences between subgroups is displayed, the cells are highlighted in green.

In some cases, seemingly large differences between subgroups are not statistically significant. This is a function of sample size and response variability.

Age

Older respondents have been shooting the longest and by virtue of this fact, own the most firearms and have been carrying the longest. However, younger respondents, on average, carry more frequently, purchased more firearms and spent more money on firearms and ammunition in the past 12 months. Younger respondents also intend to spend more money in the coming 12 months on all types of accessories. This is most likely due to the fact that older respondents already own the firearms and accessories needed for carry while younger respondents are still in process of obtaining equipment and developing a style of carry.

Younger respondents are more likely than older respondents to purchase firearms, ammunition and accessories from outdoor specialty stores, online-only retailers, and online only auction sites. A significantly larger proportion of younger respondents purchased ammunition and accessories from "Other" online retailers suggesting they were more likely than older respondents to purchase from

lesser known online retailers. Older respondents will use printed catalogs more frequently than younger respondents.

The older respondents had more training in all categories than younger respondents but younger respondents intend to take more training in the next six months.

Younger respondents are more passionate, in general, regarding conceal carry than older respondents.

	Ages 21 to 34 (n=224) (a)	Ages 35 to 54 (n=1,237) (b)	Ages 55 to 64 (n=1,500) (c)	Ages 65+ (n=1,560) (d)
Mean number of guns owned	7.1	10.0 ^a	11.7 ^{ab}	11.3 ^{ab}
Frequency of carry	Most of the time/Always ^{bcd}	Most of the time	Most of the time	Most of the time
Frequency of carry to increase, decrease or stay the same in next 12 months - Increase	35.7 ^d	30.6	31.1	29.2
Frequency of carry to increase, decrease or stay the same in next 12 months – Stay the Same	63.4	69.3	68.7	70.6 ^a
Reasons to obtain carry permit				
I feel safer just knowing I can defend myself if necessary	87.5 ^{bcd}	81.1	80.0	79.4
It is my second amendment right	80.4 ^{bcd}	71.9	69.8	68.9
I am my family’s first line of defense	76.8 ^{cd}	72.5 ^{cd}	68.3	66.2
I feel concerned for the safety of me and my family	64.7	66.2	69.7 ^b	72.0 ^{ab}
I can’t rely on the police in my area	22.3	21.7	24.3	25.7 ^b
Additional Items carried for defense				
Folding knife	80.4 ^{bcd}	73.3	71.6	68.8
Flashlight	48.2 ^{cd}	46.9 ^{cd}	44.8	41.7
Impact weapon (e.g., baton, coin purse)	9.4 ^{bd}	8.4	10.0 ^{bd}	7.1
Fixed-blade knife	8.5 ^{cd}	6.5 ^{cd}	5.2	4.1
Purchasing and spend				
Mean number of handguns purchased in past 12 months for carry	1.08	1.16 ^d	1.13 ^d	1.02
Mean spend on handguns in past 12 month	\$751.3	\$934.9 ^a	\$897.7 ^a	\$911.2 ^a
Mean spend on handgun ammunition in past 12 months	\$482.60	\$560.60 ^a	\$550.70	\$444.80
Mean spend on accessories in past 12 months	\$214.12	\$257.31 ^{ad}	\$267.22 ^{ad}	\$225.89
Accessories purchased				
Holster	70.5	68.8 ^d	67.3	64.7
Belt	54.9 ^d	47.9	49.7 ^d	45.8
Magazine carrier	38.4 ^d	33.3	36.2 ^d	30.5
Clothing – outer layer (e.g., Shirts, pants, socks)	31.3	30.1	32.0 ^d	28.2
Tactical bag	23.2	28.5	31.9 ^{ad}	26.2
Backpack	21.0	24.9 ^d	23.5 ^d	20.3
Clothing – under layer (e.g., underwear, bras, corsets)	15.6 ^d	11.6 ^d	12.7 ^d	8.5

Handbag	5.4	8.9	9.9 ^{ad}	6.9
Briefcase	1.8	5.0 ^a	6.9 ^{ab}	8.0 ^{ab}
I did not buy any carry accessories in the past 12 months	13.8	13.2	12.6	17.6 ^{bc}
Accessories planning to purchase in next 12 months				
Holster	41.1 ^d	37.8 ^d	37.1	33.8
Magazine carrier	31.7 ^d	30.0 ^d	25.9 ^d	21.3
Magazine	29.5 ^d	31.0 ^{cd}	25.7 ^d	20.3
Belt	25.9 ^d	25.5 ^{cd}	22.1 ^d	17.8
Clothing – outer layer (e.g., Shirts, pants, socks)	23.2 ^d	25.9 ^{cd}	21.2 ^d	17.7
Tactical bag	18.3 ^d	20.5 ^{cd}	14.8 ^d	11.1
Clothing – top layer (e.g., Coats, jackets, vests)	13.8	20.0 ^{ad}	17.9 ^d	13.9
Clothing – under layer (e.g., underwear, bras, corsets)	11.2 ^{cd}	11.0 ^{cd}	7.1 ^d	4.9
Backpack	9.8 ^d	10.2 ^d	8.9 ^d	5.0
Handbag	5.8	7.5 ^{cd}	5.1	4.2
Briefcase	5.4	5.4 ^d	4.0	3.6
I do not plan to buy any carry accessories in the next 12 months	21.0	21.3	26.2 ^b	31.5 ^{bc}
Places initiated purchase of a firearm				
Outdoor Specialty Store (e.g., Cabela's, Bass Pro, Gander Mountain)	42.4	38.9	41.3 ^d	35.8
From an individual	17.4	19.1 ^d	17.5	15.7
Online-only retailer (e.g., AblesAmmo.com, CheaperThanDirt.com, Impactguns.com)	15.6	16.2 ^d	14.5	12.5
Online auction sites (e.g., GunsAmerica, Gunbroker.com)	12.9	13.5 ^d	12.5 ^d	9.0
Firearms shows or expos	12.5	15.1	18.3 ^b	18.0 ^b
Online from a Mass Merchant, Outdoor Specialty Store, General Sporting Goods Store, or a local gun shop	9.4	14.6	15.6	15.9 ^a
Mass Merchant (Wal-Mart, K-Mart, Sam's Club, etc.)	7.6	10.7 ^c	7.4	8.8
Manufacturers websites	4.0	5.8	7.8 ^{ab}	6.3
Printed Catalog – Outdoor Specialty Store (e.g., Cabela's, Bass Pro)	0.9	5.3 ^a	6.3 ^a	7.5 ^{ab}
Other	2.7	5.7	6.2 ^a	6.3 ^a
Online retailers where initiated purchase of firearms				
Gunbroker.com	31.0	35.6	29.3	28.7
Palmetto State Armory	16.9	15.5	14.2	8.9
Basspro.com	2.8	8.7	10.7	6.5
Places purchased ammunition				

Outdoor Specialty Store (e.g., Cabela's, Bass Pro, Gander Mountain)	64.7 ^d	64.3 ^{cd}	60.6 ^d	53.1
Mass Merchant (Wal-Mart, K-Mart, Sam's Club, etc.)	61.6 ^{cd}	58.6 ^{cd}	48.2	45.1
Online-only retailer (e.g., AblesAmmo.com, CheaperThanDirt.com, Impactguns.com)	40.6	40.0 ^d	40.7 ^d	34.6
Shooting range	34.4 ^{cd}	28.0 ^{cd}	23.3	22.5
Printed Catalog – Outdoor Specialty Store (e.g., Cabela's, Bass Pro)	4.5	13.3 ^a	15.1 ^a	14.0 ^a
Online auction sites (e.g., GunsAmerica, Gunbroker.com)	4.5	5.3 ^d	5.1	3.8
Other	0.0	2.9 ^a	3.2 ^a	3.2 ^a
Online retailers where purchased ammunition				
Cabelas.com	22.2	32.9 ^a	33.0 ^a	33.9 ^a
Palmetto State Armory	12.0	13.2 ^{cd}	9.3	7.5
Walmart.com	11.1	20.4 ^a	22.7 ^a	26.8 ^{abc}
Sportsman's Guide	9.3	21.9 ^a	18.9 ^a	22.7 ^a
Basspro.com	8.3	19.4 ^{ad}	17.2 ^a	14.4
J & G Sales	2.8	4.2 ^c	2.1	2.4
Gunbroker.com	1.9	7.8 ^a	6.8 ^a	6.2
GalleryofGuns.com	0.9	3.0 ^d	2.1	1.1
Other	35.2 ^b	25.5	29.7	26.7
Places purchased firearms and carry accessories				
Outdoor Specialty Store (e.g., Cabela's, Bass Pro, Gander Mountain)	47.8	50.3 ^d	50.5 ^d	44.2
Online-only retailer (e.g., AblesAmmo.com, CheaperThanDirt.com, Impactguns.com)	40.6 ^d	38.8 ^d	35.5 ^d	28.1
Mass Merchant (Wal-Mart, K-Mart, Sam's Club, etc.)	21.4	26.7 ^{cd}	22.5	20.8
Firearms shows or expos	14.7	18.5	23.5 ^{ab}	22.9 ^{ab}
General Sporting Goods	10.3	17.2 ^a	16.5 ^a	19.4 ^{ab}
Online auction sites (e.g., GunsAmerica, Gunbroker.com)	3.6	5.7	6.6 ^d	4.6
Printed Catalog – Outdoor Specialty Store (e.g., Cabela's, Bass Pro)	2.7	9.3 ^a	11.1 ^a	13.3 ^{ab}
Online retailers where purchased firearms and carry accessories				
Cabelas.com	20.9	31.6 ^a	33.3 ^a	33.7 ^a
Cheaperthandirt.com	23.6	25.6	31.9 ^a	33.7 ^{ab}
Dick's Sporting Goods	3.6	10.1 ^a	9.8 ^a	10.8 ^a
Midwayusa.com	26.4	35.2	36.4 ^a	37.3 ^a
Sportsman's Guide	9.1	18.4 ^a	18.1 ^a	20.9
Walmart.com	7.3	12.4	15.1	17.6 ^{ab}
Other	46.4 ^{bcd}	32.8 ^d	31.4 ^d	26.2 ^d

Sources of information used for carry equipment and accessories				
Manufacturers websites	60.7	56.8	61.4 ^c	58.8
Magazines and periodicals	57.6	64.1	72.8 ^{ab}	75.5 ^{ab}
Online discussion forums	54.9 ^{bcd}	42.4 ^{cd}	35.7 ^d	26.2
Firearms shop personnel	53.6 ^{bcd}	42.1	45.4	45.5
Friends	50.9 ^{cd}	46.6 ^{cd}	42.6 ^d	37.9
Blogs	47.3 ^{bcd}	29.9 ^{cd}	21.9 ^d	15.8
YouTube	31.7 ^{bcd}	18.5 ^{cd}	14.3 ^d	10.9
Family members	30.4 ^{bcd}	22.5 ^d	20.1 ^d	14.9
TV programs	4.9	8.0 ^d	7.4 ^d	5.3
I don't usually research carry equipment and accessories	2.2	3.1	2.1	3.9 ^c
Mean number of classes/training sessions taken				
Basic handgun usage and maintenance	2.08	2.20	2.48 ^b	2.70 ^{ab}
Range safety instruction	2.08	2.07	2.39 ^{ab}	2.37 ^{abc}
Defensive pistol training	1.51	1.76	2.03 ^b	2.00 ^b
Practical pistol training	1.41	1.71	1.94 ^{ab}	1.95 ^{ab}
Concealed carry permit class	1.20	1.34	1.47 ^a	1.67 ^{ab}
Plans to take training in next 6 months				
Concealed carry permit class	8.0	8.7 ^{cd}	6.0	6.2
Range safety instruction	11.2 ^{bcd}	6.0	6.7	6.6
Basic handgun usage and maintenance	12.5 ^{bcd}	6.6	5.5	6.2
Simunitions training	16.1 ^{cd}	14.5 ^{cd}	11.4	9.4
Practical pistol training	30.8 ^{cd}	24.9 ^{cd}	19.9	17.3
Defensive pistol training	50.4 ^{cd}	45.6 ^{cd}	37.6 ^d	31.2
I don't plan on taking any handgun training in the next 6 months	39.3	40.7	46.3 ^{ab}	53.7 ^{abc}
Factor Mean Scores				
Training & Preparation	4.48 ^{cd}	4.44	4.38	4.37
Proficiency	3.89	3.89 ^d	3.84	3.79
Concerned	3.18	3.39 ^a	3.42 ^a	3.43 ^a
Gun Rights	2.38 ^{bcd}	2.13	2.16	2.19
You can't count on others for protection	4.17	4.13	4.16	4.30 ^{abc}
I really like all of the new concealed carry options available	4.08 ^{bcd}	3.86	3.79	3.80
I constantly practice so I can be prepared in case I need to use my firearm	3.89 ^{cd}	3.80 ^d	3.73	3.65

Geographic Region

There are few differences between regions in terms of the average number of guns owned or in spend on firearms, ammunition and accessories for spend. However, those in the South tend to carry more frequently than those in any other region. Those in the South also prefer to shop at Basspro.com for ammunition and accessories more than any other region and Walmart and Walmart.com more than respondents in the Northeast and West.

Respondents in the West have had more training in virtually all activities relative to all other regions.

	Northeast (n=438) (a)	Midwest (n=1,371) (b)	West (n=1,031) (c)	South (n=1,681) (d)
Mean number of guns owned	10.7	10.9	11.3	10.6
Frequency of carry	Sometimes/Most of the time	Most of the time ^a	Most of the time ^a	Most of the time/Always ^{abc}
Frequency of carry to increase, decrease or stay the same in next 12 months - Increase	31.3	32.5 ^c	28.7	29.9
Reasons to obtain carry permit				
I feel safer just knowing I can defend myself if necessary	77.9	82.4 ^{ac}	78.4	80.8
It is my second amendment right	69.9	74.0 ^{bc}	67.5	70.0
I feel concerned for the safety of me and my family	60.3	70.8 ^a	70.7 ^a	69.5 ^a
I wanted to have it just in case I decide to carry	24.4 ^{bc}	21.0 ^c	17.0	19.0
I can't rely on the police in my area	18.0	25.3 ^a	27.1 ^{ad}	22.5 ^a
It is required for my job	5.7 ^{bd}	2.3	3.6	3.0
I have had threats on my life	5.7	7.2	9.4 ^{ad}	7.0
Additional Items carried for defense				
Flashlight	43.2	42.2	46.0	45.7 ^b
Tactical pen	14.8	14.6	18.1 ^b	16.2
OC/Pepper Spray	10.5	9.5	10.9 ^d	8.6
Impact weapon (e.g., baton, coin purse)	8.7	7.4	8.2	9.6 ^b
Stun gun	0.7	1.4	2.3 ^a	1.8
Purchasing and spend				
Mean number of handguns purchased in past 12 months for carry	1.05	1.17 ^{ac}	1.00	1.12 ^c
Mean spend on handguns in past 12 month	\$913.80	\$891.70	\$905.70	\$911.40
Mean spend on handgun ammo in past 12 months	\$528.30	\$505.80	\$529.20	\$506.20
Mean spend on accessories in past 12 months	\$260.44	\$245.37	\$246.82	\$247.85
Accessories purchased				
Magazine carrier	35.2	32.3	36.6 ^{bd}	32.3
Tactical bag	23.7	27.5	28.0	31.1 ^{ab}
Clothing – under layer (e.g., underwear, bras, corsets)	8.9	10.0	10.8	12.8 ^{ab}
Handbag	5.3	6.7	6.8	11.5 ^{bc}

Accessories planning to purchase in next 12 months				
Clothing – outer layer (e.g., Shirts, pants, socks)	16.9	22.5 ^a	23.0 ^a	20.7
Clothing – top layer (e.g., Coats, jackets, vests)	12.6	17.9 ^a	19.9 ^{ad}	15.3
Places initiated purchase of a firearm				
Local firearms shop	71. ^{bcd}	58.1	60.7	59.4
Outdoor Specialty Store (e.g., Cabela’s, Bass Pro, Gander Mountain)	35.4	46.5 ^{acd}	35.4	35.6
From an individual	12.8	16.0	17.1 ^a	19.6 ^{ab}
Firearms shows or expos	12.3	13.7	14.8	22.3 ^{abc}
Online-only retailer (e.g., AblesAmmo.com, CheaperThanDirt.com, Impactguns.com)	11.4	14.4	14.0	15.2 ^a
General Sporting Goods	8.0	11.0	12.2 ^a	11.9 ^a
Shooting range	6.8	13.9 ^{ac}	10.9 ^a	13.0 ^a
Mass Merchant (Wal-Mart, K-Mart, Sam’s Club, etc.)	5.9	9.4 ^a	7.7	9.7 ^a
Printed Catalog – Outdoor Specialty Store (e.g., Cabela’s, Bass Pro)	5.3	7.7 ^{cd}	5.2	5.7
Online retailers where initiated purchase of firearms				
Cabelas.com	28.1 ^d	27.5 ^d	23.3 ^d	13.0
Dick’s Sporting Goods	10.7 ^d	6.1	5.5	5.8
Palmetto State Armory	10.7	12.7	8.6	16.4 ^c
GalleryofGuns.com	9.1	7.5	12.0 ^d	7.8
Sportsman’s Guide	9.1	11.6 ^c	7.1	9.1
Brownells.com	4.1	8.0 ^d	6.4	4.8
Midwayusa.com	4.1	10.5 ^a	8.6	7.2
Places purchased ammunition				
Local firearms shop	55.9 ^{bcd}	44.7	42.9	44.5
Outdoor Specialty Store (e.g., Cabela’s, Bass Pro, Gander Mountain)	54.3	64.7 ^{acd}	57.0	57.3
Mass Merchant (Wal-Mart, K-Mart, Sam’s Club, etc.)	47.5	51.3 ^c	46.3	53.6 ^{ac}
Online-only retailer (e.g., AblesAmmo.com, CheaperThanDirt.com, Impactguns.com)	30.8	36.7 ^a	41.5 ^{ab}	39.8 ^a
General Sporting Goods	15.8	20.7 ^a	22.7 ^{ad}	19.5
Shooting range	15.8	26.3 ^{ac}	22.5 ^a	27.5 ^{ac}
Firearms shows or expos	13.2	14.6	20.8 ^{ab}	21.5 ^{ab}
From an individual	3.9	5.6	7.1 ^a	5.9
Online retailers where purchased ammunition				
Cheaperthandirt.com	31.9	32.5	38.7 ^b	37.2
Cabelas.com	30.3	38.9 ^{ad}	36.6 ^d	26.2
Dick’s Sporting Goods	20.7 ^{bcd}	13.9 ^c	7.9	14.4 ^c
Walmart.com	19.1	22.0	19.7	26.3 ^{ac}

Sportsman's Guide	18.1	22.0 ^c	16.7	22.3 ^c
Basspro.com	9.6	14.3	13.2	21.6 ^{abc}
Brownells.com	6.9	12.8 ^a	10.9	12.0 ^a
Palmetto State Armory	5.9	8.3	8.0	13.2 ^{abc}
CDNN Sports	3.2	5.0 ^c	2.3	3.8
J & G Sales	2.7	1.6	5.0 ^{bd}	2.4
Other	34.6 ^d	28.0	28.2	25.9
Places purchased firearms and carry accessories				
Local firearms shop	59.1 ^{bcd}	51.5	52.4	51.5
Outdoor Specialty Store (e.g., Cabela's, Bass Pro, Gander Mountain)	44.7	52.7 ^{acd}	47.7	45.4
Online-only retailer (e.g., AblesAmmo.com, CheaperThanDirt.com, Impactguns.com)	27.6	35.0 ^a	36.2 ^a	33.8 ^a
Mass Merchant (Wal-Mart, K-Mart, Sam's Club, etc.)	22.4	23.3	20.2	24.6 ^c
Firearms shows or expos	15.8	19.5	20.4 ^a	25.3 ^{abc}
General Sporting Goods	12.6	16.4	20.1 ^{ab}	17.7 ^a
Shooting range	8.0	16.6 ^a	14.5 ^a	17.5 ^{ac}
Online auction sites (e.g., GunsAmerica, Gunbroker.com)	7.5 ^{cd}	6.0	4.8	5.1
From an individual	5.7	7.7	9.5 ^a	10.2 ^{ab}
Online retailers where purchased firearms and carry accessories				
Cabelas.com	37.9 ^d	36.2 ^d	34.7 ^d	26.1
Cheaperthandirt.com	24.2	26.7	29.8	34.6 ^{ab}
Sportsman's Guide	21.4 ^c	19.6 ^c	14.9	19.2
Dick's Sporting Goods	17.1 ^{bcd}	8.8	6.0	11.4 ^c
Walmart.com	13.7	14.8	11.3	16.7 ^c
Basspro.com	8.8	12.5	10.4	17.2 ^{abc}
Palmetto State Armory	8.8	7.7	9.8	11.3 ^b
Sources of information used for carry equipment and accessories				
Magazines and periodicals	69.6	72.6 ^d	71.6	68.6
Other firearms information websites	39.7	39.3	41.9	43.5 ^b
Online discussion forums	29.2	34.9 ^a	38.0 ^a	35.4 ^a
Blogs	19.4	24.5 ^a	24.0	22.8
Family members	16.2	20.6 ^a	18.9	19.6
Mean number of classes/training sessions taken				
Basic handgun usage and maintenance	2.37 ^b	1.99	2.75 ^{ab}	2.69 ^b
Range safety instruction	2.19	1.94	2.54 ^b	2.42 ^b
Practical pistol training	1.87 ^b	1.51	2.07 ^b	1.99 ^b
Defensive pistol training	1.83	1.58	2.36 ^{bd}	1.96 ^b
Dry fire training	1.72	1.69	2.43 ^{abd}	2.01 ^b
Concealed carry permit class	1.22	1.50 ^a	1.71 ^{abd}	1.41 ^a
Simunitions training	0.85	0.68	1.05 ^b	0.93 ^b

Plans to take training in next 6 months				
Practical pistol training	20.5	18.9	21.8	22.1 ^b
Simunitions training	9.6	11.5	10.6	13.4 ^{ac}
Concealed carry permit class	9.1 ^{bd}	5.3 ^d	13.6 ^{abd}	3.6
Basic handgun usage and maintenance	8.9 ^b	4.5	7.6 ^b	6.5 ^b
Range safety instruction	8.9 ^b	5.5	7.1	6.8
Other	5.7	6.1	5.0	8.3 ^{bc}
I don't plan on taking any handgun training in the next 6 months	49.8 ^c	48.2 ^c	41.3	48.7 ^c
Factor Mean Scores				
Vigilant	3.79	3.95 ^a	3.98 ^a	4.04 ^a
Concern	3.46 ^d	3.46 ^d	3.39	3.35
Gun Rights	2.09	2.16	2.11	2.25 ^{ac}

