

SAMPLE REPORT



SUPPLEMENTAL REPORT

Modern Sporting Rifle Owners: An In-Depth Exploration

*Supplement to the Consumer Segmentation Analysis on the Commercial
Firearms & Accessories Market*



SOUTHWICK
ASSOCIATES



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This study takes an in-depth look at firearm owners who purchased a modern sporting rifle in the past five years and those that are likely to purchase one in the next 12 months. As a follow up to *The Customer Segmentation Analysis on the U.S. Commercial Firearms and Accessories Market report*, the purpose of this study is to help companies build more relevant products and increase sales through targeted communications in the modern sporting rifle market.

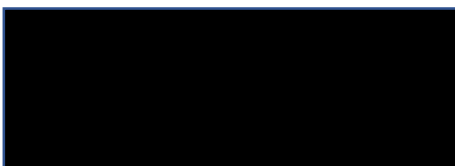
The modern sporting rifle (MSR) customer is not like other firearm owners. Consisting of four key firearm customer segments, they happen to be younger and more ethnically diverse. For example, Hispanics make up 13% of all U.S. firearm owners, but when looking at just modern sporting rifle customers, 18% of them are Hispanic. What also makes them unique is their active lifestyle. [REDACTED]
a big mo [REDACTED]
all other [REDACTED]

Overall, they are an attractive audience since they are one of the biggest spenders among all firearm customers and will shop through multiple channels to buy exactly what they want.

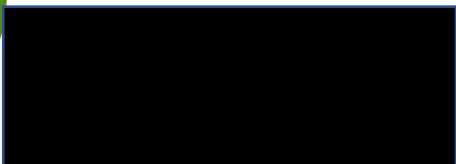
Topline View of the MSR Customer



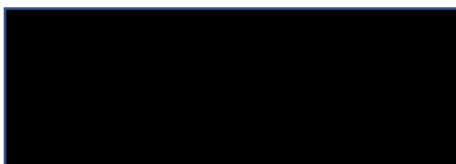
WHO THEY ARE



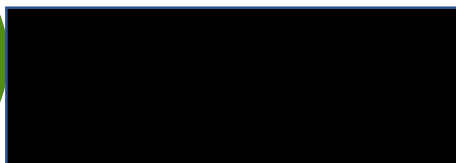
FIREARMS KNOWLEDGE



PURCHASE DRIVERS



PATH TO PURCHASE



Hunting
[Redacted]
1X or more per year

Target shooting
[Redacted]
1X or more per Year

Average Spend
[Redacted]
On a MSR

FIREARM CUSTOMER SEGMENTS: (Most likely to be classified as)



*For more information on firearm owner segments, visit:
www.southwickassociates.com/commercial/firearms-consumer-segmentation/*

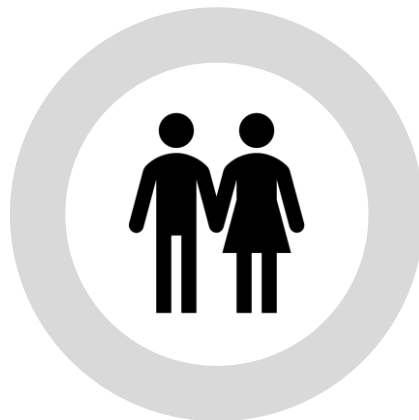
Who They Are



Likely to be...



% Male



% Married



% Ethnicity

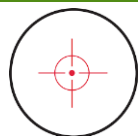


Ave. Age:

% Ages

*Q: Are you? (Male or Female); In what year were you born? Which of the following best describes your race (select below)? What is your marital status (select below)?
Sample: Total (N=348)*

Who They Are



Likely to be



% College Educated



% City/Suburb/Rural



% HHI

Q: Please check the highest level of education you completed (select below); Where is your home located (select below)? Please check the category that best describes your level of income (select below); Sample: Total (N=348)

How They View Themselves

They like to be outside....



Q: "Choose up to three words to describe yourself." Sample: Those who recently purchased a modern sporting rifle or looking to buy one in the next five years: Total (N=336).

How They View Themselves



Firearms knowledge...

Very knowledgeable. %

Knowledgeable enough to use my
firearms safely. %

Beginner level / Basic
knowledge. %

Q: "When it comes to firearms knowledge, do you consider yourself...?" Sample: Those who recently purchased a modern sporting rifle or looking to buy one in the next five years: Total (N=336).

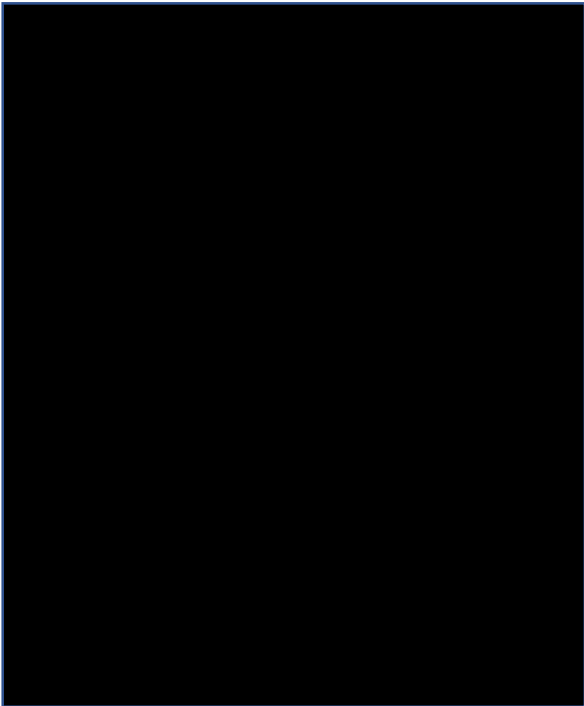
Reasons for Owning a Modern Sporting Rifle



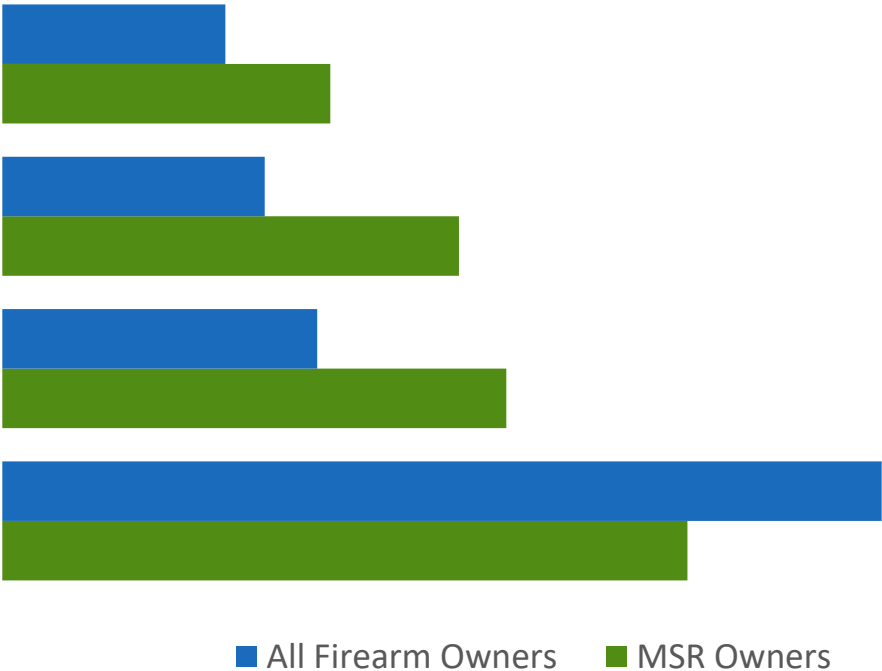
Unlike many firearm owners that are mostly concerned with....



Primary Purpose

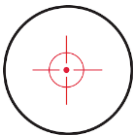


Top 3 Reasons for their Last MSR Purchase



Q: What is your primary purpose for buying a modern sporting rifle? What are your top 3 reasons for buying your most recent firearm (select up to three below)? Sample: MSR Owners=113

Reasons for Buying their Next Modern Sporting Rifle



Modern sporting rifles may have been associated with...

Top Reasons for Buying a MSR in the Future

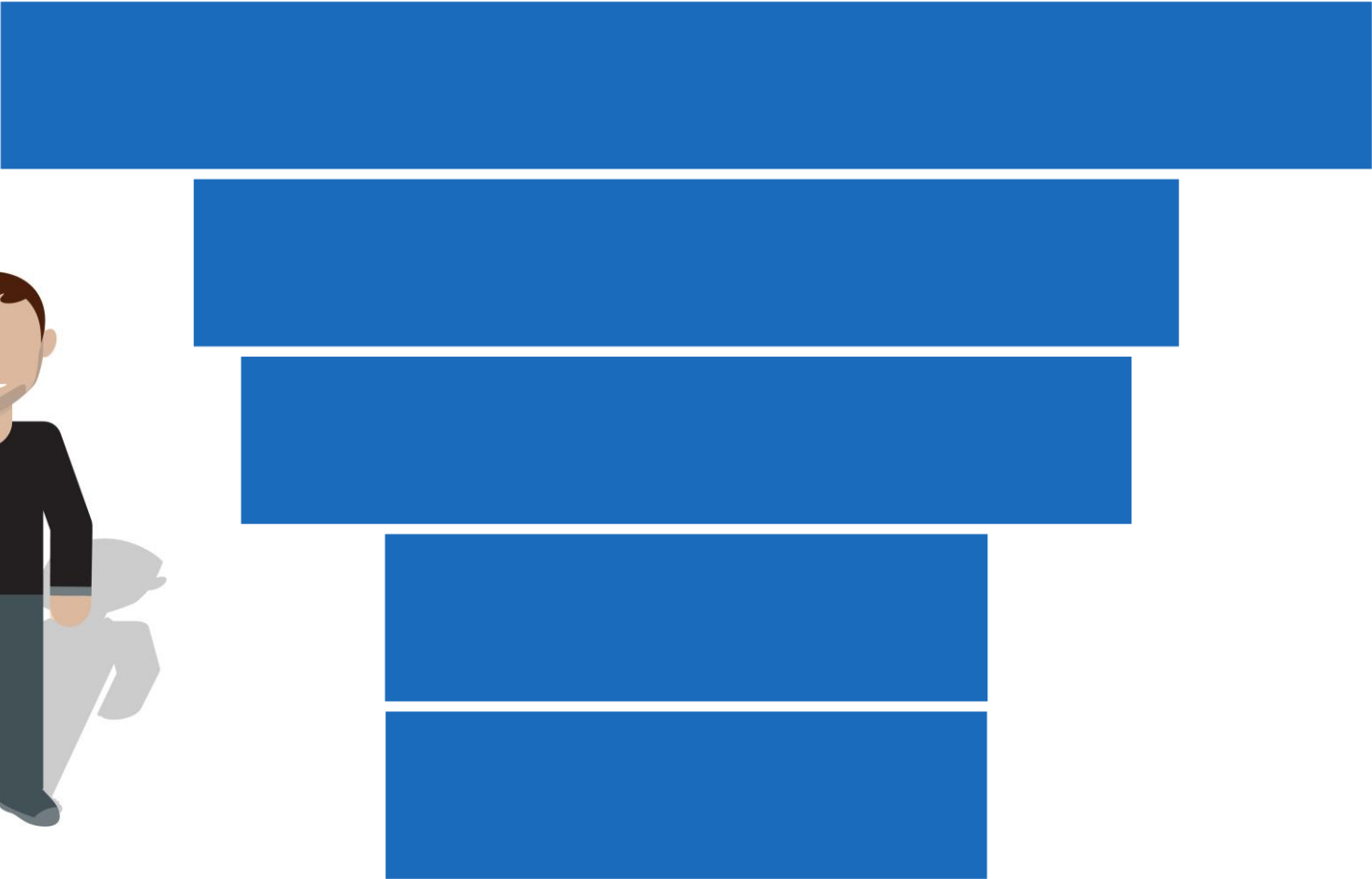


Q: What are your top 3 reasons for buying a firearm in the future (select up to three below), Sample = Those who looking to buy a modern sporting rifle in the next year: N=260.

Reasons for Maintaining an MSR for Protection



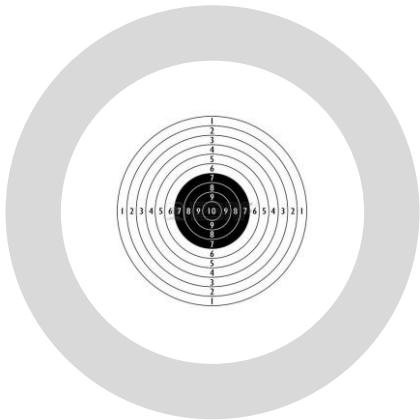
Protecting...



Q: Select the following reasons why you would choose to own a firearm for protection purposes. Sample = (N=348).



Target shooting...



%

Target Shooting



%

Maintained
Firearm for Home
Protection



%

Maintained a
Firearm for
Protection Away
from Home

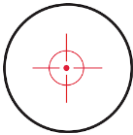


%

Hunting Deer and
other Big Game

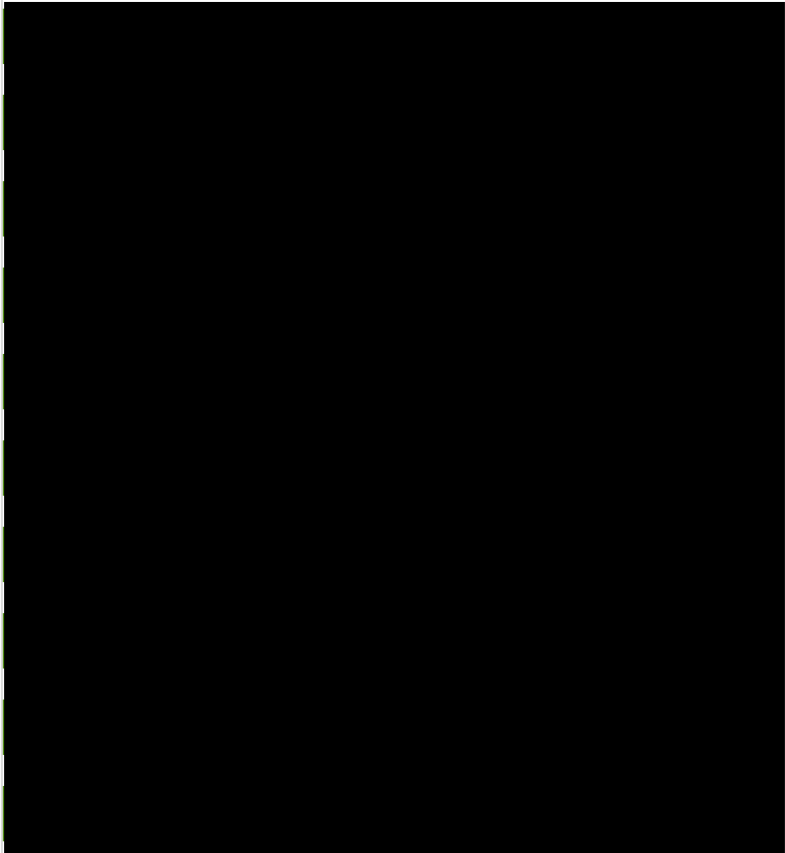
Q: Please check the types of firearm-related activities you have engaged with in the past year (select below). Sample: Those who own a modern sporting rifle or looking to purchase one: N=283.

Frequency of Target Shooting and Hunting



They are most likely to participate in....

- Not sure
- Once a week or more during my preferred season(s)
- More than once a month during my preferred...
- Approximately once a month during my preferred...
- Two to six times a year
- Once a year, typically
- Once every year to five years
- Maybe once every five years or more
- Just once in my life
- I have never been



■ Target shooting ■ Hunting

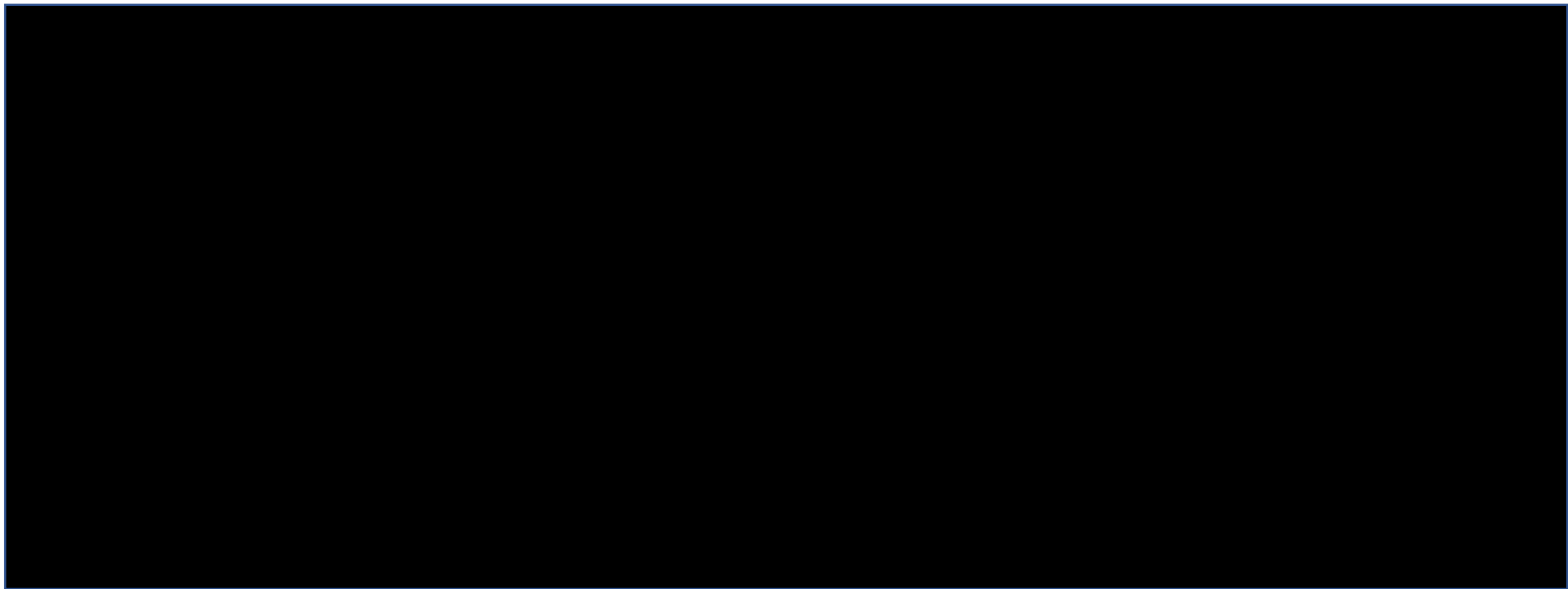
Q: Please check the statement that best describes how frequently you go target shooting (whether it's with a rifle, handgun or shot gun) (select below). Please check the statement that best describes how frequently you go hunting (whether it's with a rifle, handgun or shot gun) (select below) Sample: Those who own a modern sporting rifle or looking to purchase one: N=340.

Modern Sporting Rifle Owners Report

Satisfactions from Target Shooting



Target shooting helps them.....

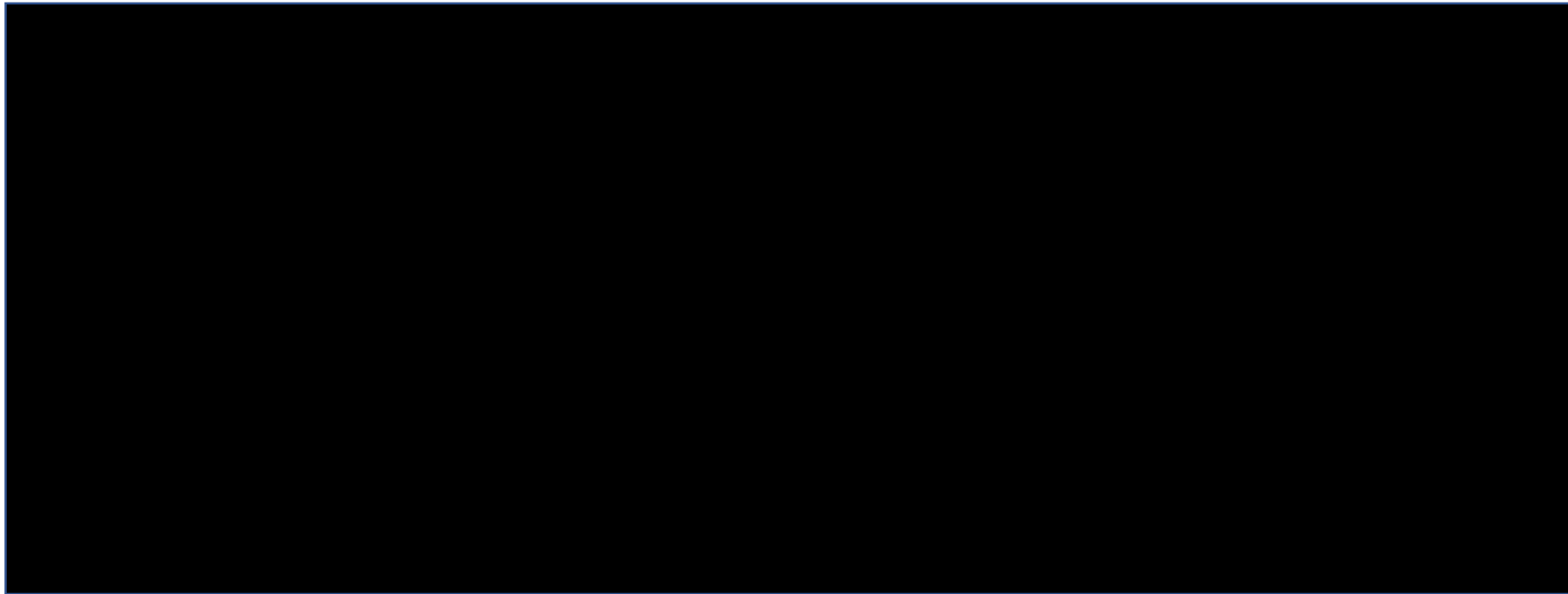


Q: Please select up to three words or phrases that best describe the satisfactions received from target shooting with a firearm (select below). Sample: Firearm owners who recently purchased a modern sporting rifle or looking to purchase one in the next five years. N=302.

Satisfactions from Hunting



Hunting enables MSR owners....



Q: Please select up to three words or phrases that best describe the satisfactions received from hunting with a firearm (select below). Sample: Firearm owners who recently purchased a modern sporting rifle or looking to purchase one in the next five years. N=172.

Top Purchase Drivers

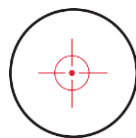


They put more value around.....



Q: Please rate the level of importance of each of the following purchase considerations when you made your most recent purchase (1 being least important; 5 is most important). Sample = Total (N=333).

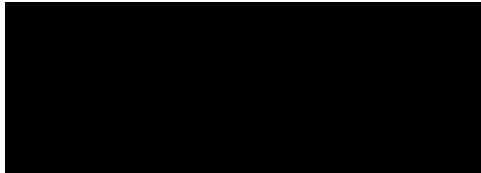
Their Path to Purchase



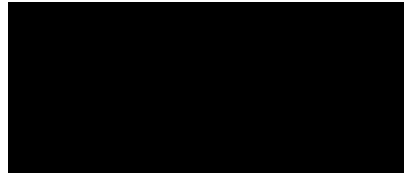
MSR customers....



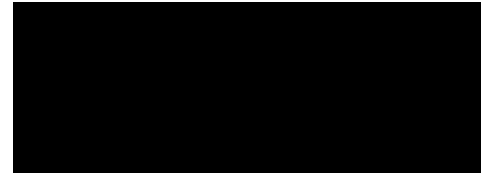
%



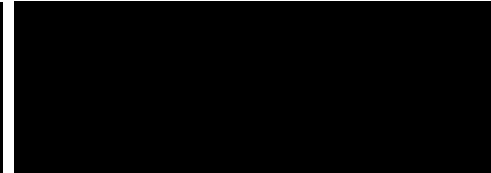
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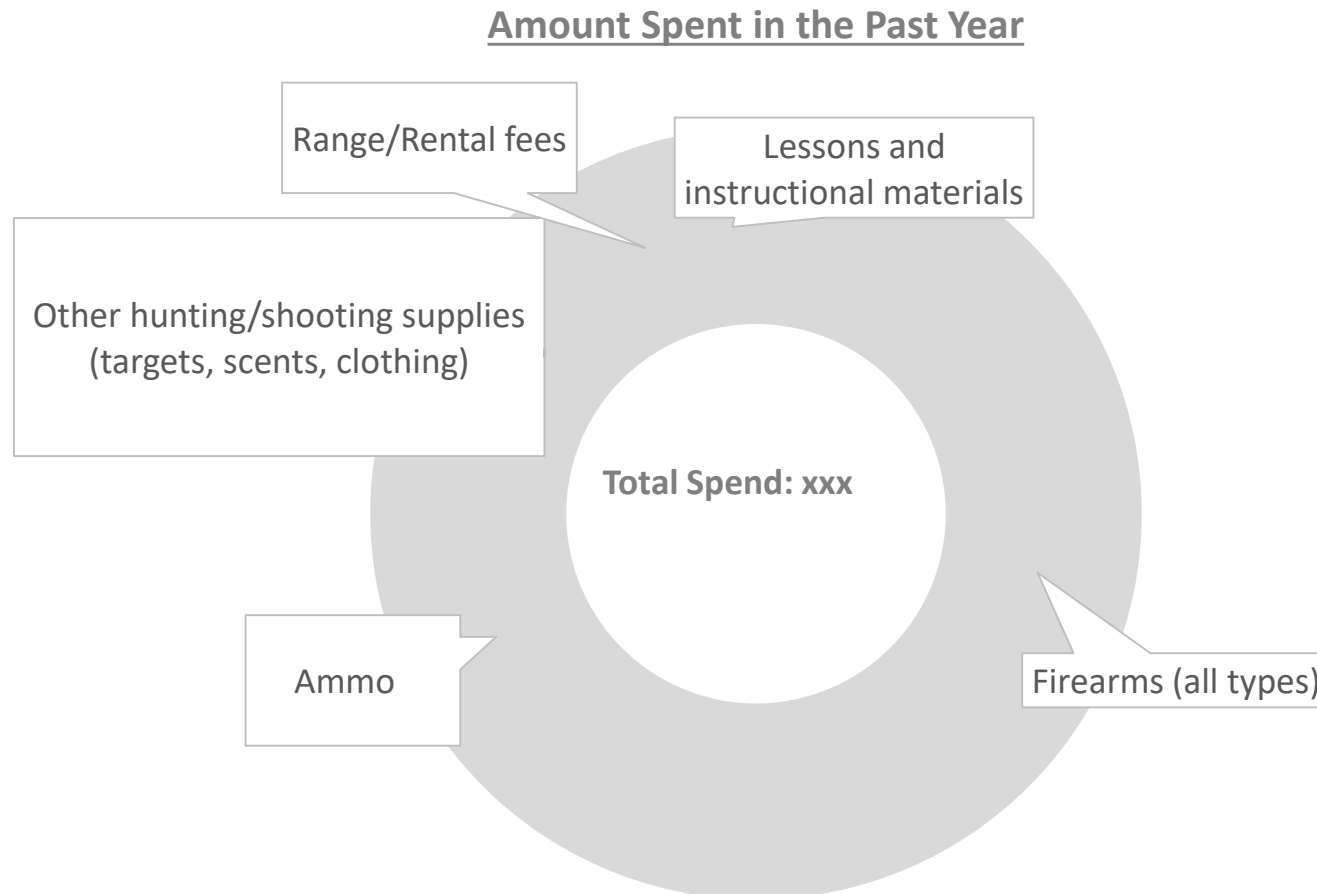
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Q: Please check all statements that describe how you conducted your last firearm purchase (last 5 yrs.) or how you would proceed with your next firearms purchase. Sample = N=340.



On average, firearm owners spent **xxxx** on their most recent modern sporting rifle.



Q: Please indicate how much you spent on the following. Sample: (N=292).; How much did you spend on your most recent firearm? Sample: Modern Sporting Rifle only (N=105).

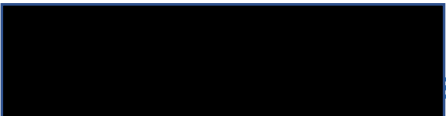
Firearm Customer Segments



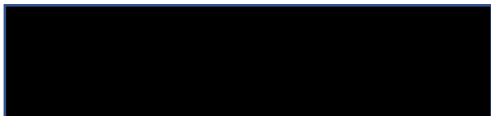
The....



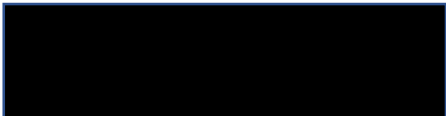
The Collector



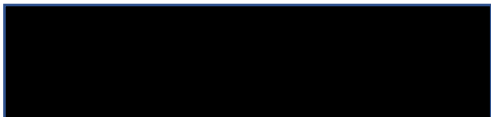
The Hunter



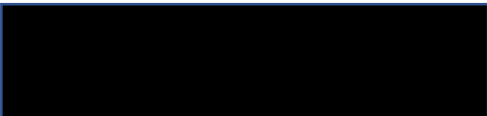
The Social
Shooter



The
Protector



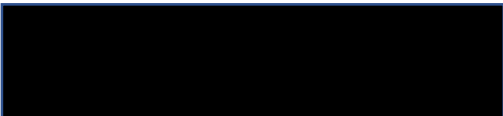
The Skills
Builder



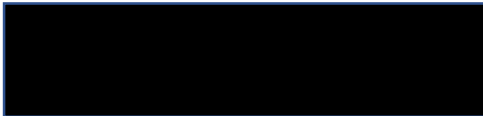
Debbie
Defense



The Urban
Recruit



Guardian
Gary



For more information on the firearm owner segments, visit: www.southwickassociates.com/commercial/firearms-consumer-segmentation/

Customer Segmentation Analysis Report Overview

A consumer segmentation analysis identifies the uniquely distinct parts, or segments, of the market. Customers are segmented based on their needs, with each segment sharing a common set of motivations for wanting to buy a product. It is not based on what the customer looks like or how they use their firearms. By understanding why consumers decide to buy firearms, and the reasons why they favor specific firearms, companies can improve their products, marketing and customer interactions.

Consumer segmentation studies are based on people's most recent purchases. Their needs and motivations can vary from purchase to purchase. For example, not everyone who hunts belongs to the "Hunter" segment. But, if their most recent purchase was to satisfy a home protection need, that hunter could fall into the "Guardian Gary" segment. Consumer segmentation studies are best interpreted as reflecting the overall mix of consumers' motivations and needs as they exist today, and not as a permanent classification for each individual customer.

The purpose of this segmentation analysis is to bring clarity to the U.S. commercial firearms and accessories market, provide a starting point for companies to explore for new business opportunities, develop a tighter bond with their customers and increase their brand loyalty. Use this report and the detailed segmentation services available from Southwick Associates (www.southwickassociates.com/commercial/firearms-consumer-segmentation) to learn more about the broader U.S. firearms and accessories market.

Additional Insights Available from the Consumer Segmentation Dataset via Custom Research

More in-depth insights are available for all firearm owners and consumers on the following topics:



Lifestyle



Outdoor Activities



Purchase Drivers



Shopping Habits



**Firearm Ownership &
Purchase Intentions**

For more information, contact Nancy Bacon, Vice President, at Nancy@SouthwickAssociates.com.

The 95,000+ surveys behind this research included men and women ages 18+ who:



Purchased a firearm since 2000



Currently own a firearm



Southwick Associates, Inc.



Southwick Associates is a market research, statistics, and economics firm, specializing in the outdoor recreation markets. For more than 25 years, Southwick Associates has delivered comprehensive insights that have advanced strategic decisions across the entire outdoor community; from resource agencies, industry associations and non-profit organizations, to utilities, outdoor manufacturers and businesses. We find solutions to problems others cannot solve. Southwick Associates was assisted by Brand Depot, LLC in the project design. For more information or customer segmentation needs, contact Nancy Bacon, Vice President, at Nancy@SouthwickAssociates.com.

National Shooting Sports Foundation



The National Shooting Sports Foundation is the trade association for the firearms industry. Its mission is to promote, protect and preserve hunting and the shooting sports. Formed in 1961, NSSF has a membership of more than 12,000 manufacturers, distributors, firearms retailers, shooting ranges, sportsmen's organizations and publishers. For more information, visit www.nssf.org/research.