



PATHS TO PARTICIPATION

*How to help hunters and target shooters try
new shooting sports activities.*



Overview

The purpose of this project is to help improve hunting and shooting sports marketing efforts by describing how current hunters and shooters can be encouraged to try other shooting activities. To achieve this, a custom survey was fielded through NSSF partner organizations from June 2017 to August 2017. Qualified survey respondents were those who participated in hunting or recreational shooting at least once within the past three years. Qualified respondents were then asked questions about their introduction and evolution through various hunting and shooting activities. Previous and current activities, as well as activities they would be interested in trying, were all evaluated. All individuals in this analysis were at least moderately interested in the addressed activity, as determined by a survey question.

The sample for this study included individuals recruited by NSSF partner organizations. The results are not representative of the population of hunters and shooters, but rather the constituency of NSSF's partner organizations. The results are not meant to be representative of all hunters and shooters, but instead were designed to support hunter and shooter *retention* efforts by explaining interest levels in new shooting sports activities and how to best help current hunters and shooters try new activities.

As a result, these results do not focus on how to recruit new, first time participants to the hunting and shooting sports, but instead focus on how to encourage our current customers to try new activities.

Introduction

As is normal, people frequently take on new recreational activities and drop others. As the shooting sports industry, the concern is our customers might drop shooting sports completely. The purpose of this study was to identify opportunities and tactics to encourage current customers to try new forms of hunting and shooting activities.

Hunters generally want to try new hunting activities that are not readily available in their home region. For example, the biggest interest for pig hunting comes from the Midwest while the greatest interest in elk and waterfowl hunting is in the South. While this makes sense, given the costs associated with travel, interest still exists in hunting different species or trying new methods close to home. For target shooting, there is little difference across the regions. Overall, the greatest interest in trying new shooting activities lies within the South and the Midwest. The many types of hunting and shooting activities available to promote are presented within this report.

There are a few hunting and shooting activities where the majority want to try it for the first time, such as target shooting with a crossbow or pig hunting. Accessibility, time and knowing how to get started are some of the most common hurdles we need to help our customers overcome. For those that want to hunt, it's difficult to find convenient and affordable lands, while target shooters often have trouble finding a local range offering the activities they are interested in trying. Both shooters and hunters hesitate in buying equipment needed for new activities before they try the sport. These and other issues are also outlined within this report.

This report presents a wealth of information. Recognizing most hunting and shooting sports programs and organizations focus on specific types of activities, after some brief overall insights, details are presented for specific types of hunting and shooting sports.

Introduction

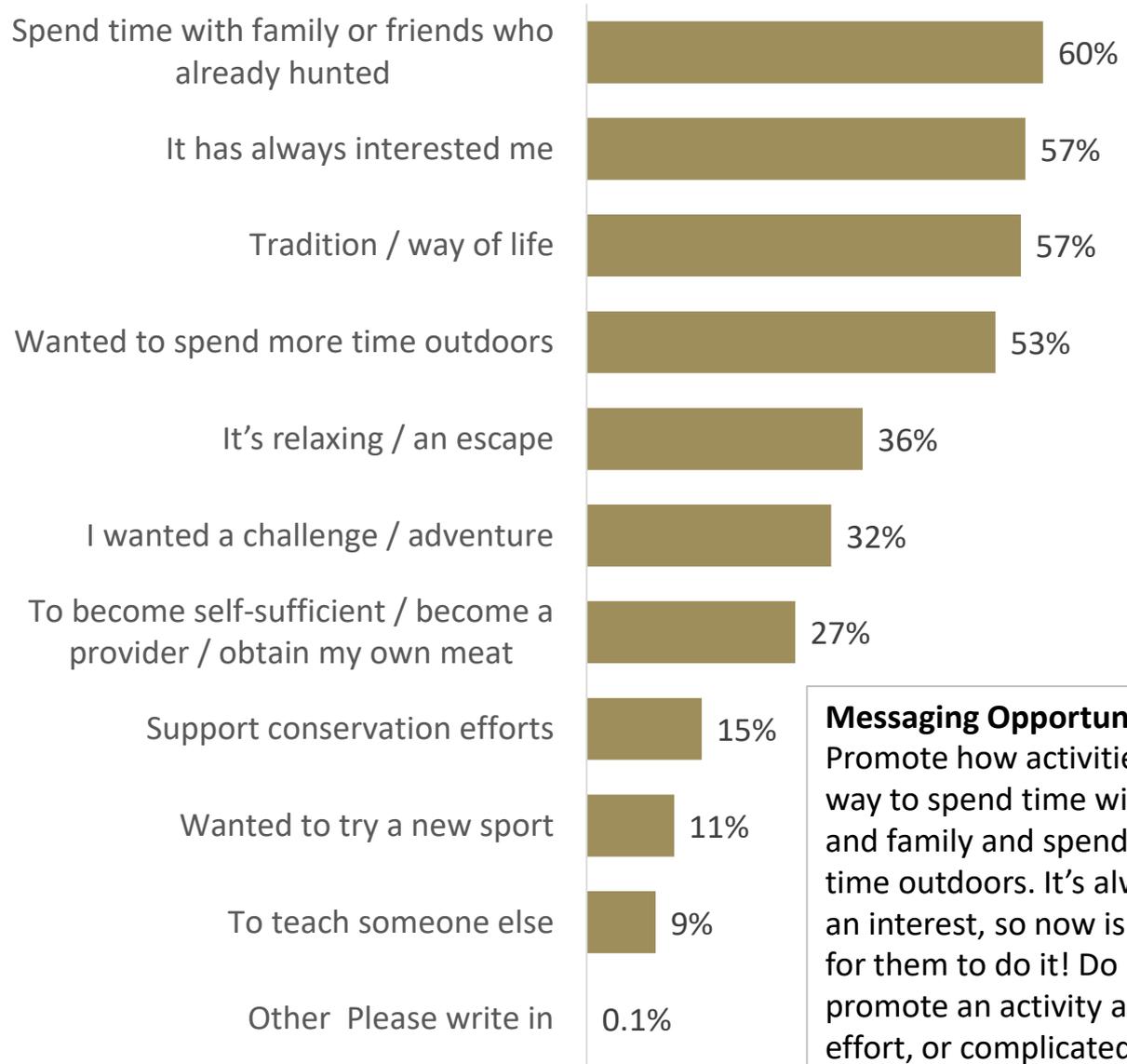
Key takeaways regarding how to help hunters and target shooters try new activities:

- **Create easy access** – Create mobile apps and online tools to help them find places to hunt or local shooting ranges, make reservations, rent equipment, etc. In addition, create beginner apps or voice-activated assistants, like Google Assistant or Amazon's Alexa that answer questions, such as what to do with their harvest, where to rent equipment, how to aim and shoot, as well as advanced level apps on perfecting their skills. Provide equipment rentals, hunting guides and group shooting / hunting events or programs that allow them to try the sport.
- **Be simplistic / convenient** – Promote how it can fit in their busy schedules, such as “way to spend time with family,” and “spend more time outdoors” and offer more close-to-home experiences. The easier an activity appears, the more simple and convenient it becomes.
- **Influence through their friends and peers** – Hunting and shooting are social activities. Very few will participate if they do not see their friends or others like themselves participating. Leverage non-professionals' hunting and shooting videos, photos and stories through social media platforms (Instagram, Facebook, YouTube), blogs, magazines and share through television programs. Encourage friends to connect at the field or at the range.
- **Promote unique experiences** – Collaborate with cross-industry retailers, organizations and manufacturers to create events or experiences that current customers will want to make time for.
- **Educate through augmented reality / video** – To give a lasting impression on what it's like to experience new hunting and shooting activities, simulate the experience at outdoor retailers, state fairs or other outdoor events where current customers gather, or showcase professionals hunting or shooting via online video on YouTube.

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

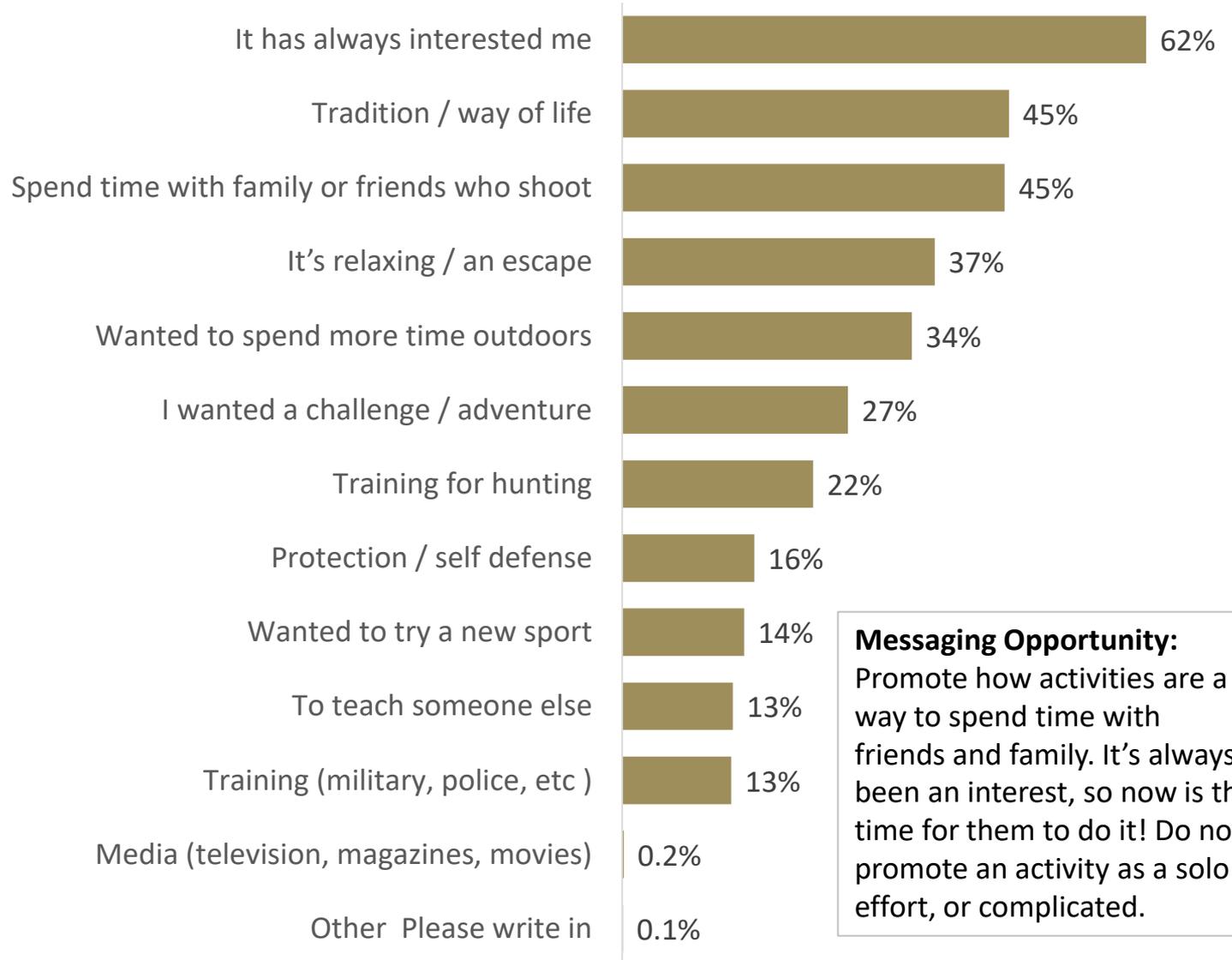
MOTIVATIONS TO START HUNTING

(any type of species)



Messaging Opportunity:
Promote how activities are a way to spend time with friends and family and spend more time outdoors. It's always been an interest, so now is the time for them to do it! Do not promote an activity as a solo effort, or complicated.

MOTIVATIONS TO START TARGET SHOOTING (any type of new shooting activity)





Bear Hunting

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

OVERVIEW – Moving People Into Bear Hunting

More than three-fourths of the hunters and shooters interested in hunting bear want to use a traditional rifle.

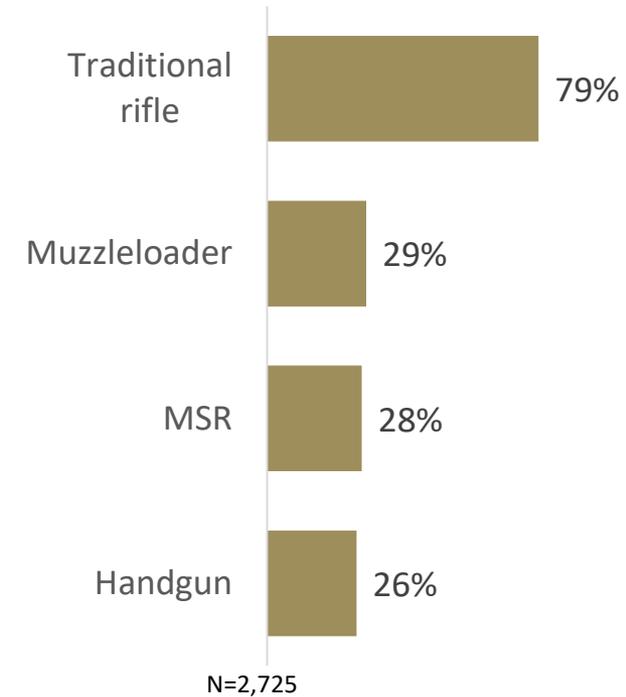
Both target shooters and hunters have never tried hunting bear, but they have experience using a traditional rifle. The majority (91%) of the hunters are currently using a traditional rifle to hunt deer and other big game. Over half of target shooters are currently using a traditional rifle for plinking or sighting-in.

Both hunters and target shooters say having the time to do the activities they want to do is not a problem. The biggest problem is not being able to hunt bear near where they live since this species is not found across the country. Also, they are most inspired by their friends to try new activities, but 23% say they don't have anyone to go with.

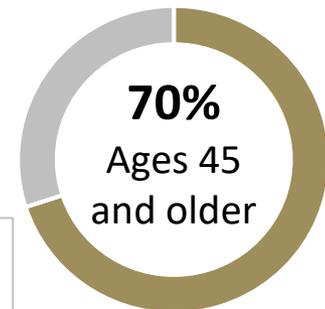
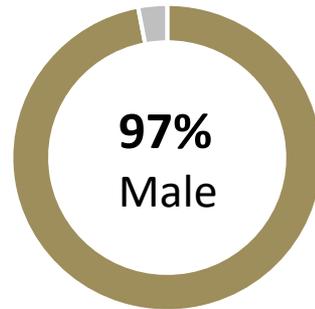
Receiving an invitation from a friend or participating in some type of program held by an organization or a retailer would encourage them to hunt a bear. In addition, how-to information and stories on professionals and non-professionals hunting bear via television, magazines, newsletters and online videos may motivate them as well.



Desired Firearms to Hunt Bear

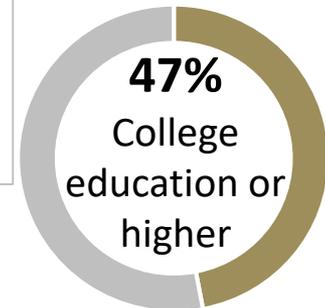
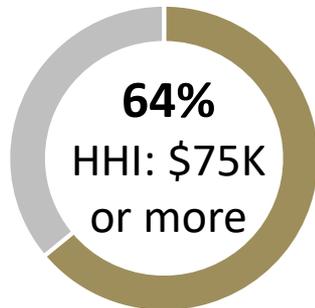


Key Demographics

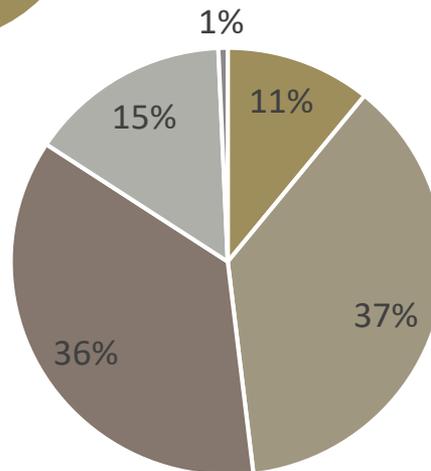


Of current hunters & target shooters who do not go bear hunting, but want to, most are male, middle-aged, affluent and/or educated. They are more likely to live in the Midwest and in the South.

Avg. Age: 57



Region



- Northeast
- Midwest
- South
- West
- Canada

MOVING HUNTERS INTO BEAR HUNTING



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



92%

Deer



64%

Turkey



60%

Small Game



53%

Upland Game
Birds



47%

Predators



37%

Waterfowl



19%

Elk



11%

Other Big
Game



4%

Wild pig



25%

Others

These hunters are fans of big game. However, none of them have ever had the experience of hunting bear. Almost the majority of these hunters are either currently using a traditional rifle (91%) or shotgun (88%) to hunt deer. Over half (59.8%) say their father took them on their first hunt and 56% of them hunted small game. Majority (95%) have tried at least one other activity. For those that did, it took 2 – 5 years for 40% of them to try a new species and only one season for 25% of them.

MOVING TARGET SHOOTERS TO BEAR HUNTING



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

Plinking / Informal Target Shooting 91%

Sighting-in 82%

Pattern Shotgun 49%

Target Shooting with a traditional
or compound bow 47%

Sporting Clays with a Shotgun 45%

Skeet with a Shotgun 39%

Trap with a Shotgun 39%

Long Range with a Traditional
Centerfire Rifle 36%

Teaching / Informative 36%

Target Shooting with a
muzzleloader 35%



Over half (63%) of shooters say their father introduced them to the sport. Plinking was the most common activity to start with and then seventy-three percent tried a different activity within five years. Shooters are using a variety of firearms. Over half of them are either using a semi-automatic handgun, traditional rifle or a revolver for plinking / informal target shooting. For sighting-in, they are most likely to use a traditional rifle or a semi-automatic handgun.

PATHS TO BEAR HUNTING

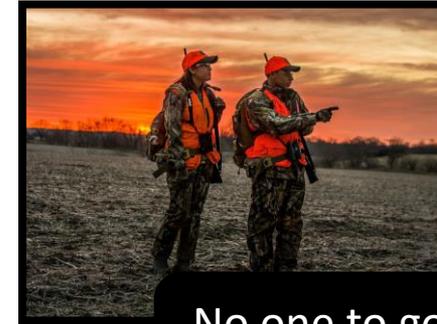


REASONS WHY THEY HAVEN'T TRIED BEAR HUNTING



Not available

39% reported “can’t find species in my part of country” and another **28%** believe “there is no convenient place to hunt.”



No one to go with

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



Too expensive

21% say “too expensive.”



Not enough time

14% say “do not have time.”

Providing more close-to-home opportunities that are easily accessible in regions that have bear hunts and / or educating the public on local opportunities and hosting group events may help grow the sport.

HOW TO HELP THEM TRY BEAR HUNTING



44%

“An invitation from a friend / family member”



34%

“Books / Magazines”



34%

“Program offered by a state wildlife agency”



28%

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



25%

“YouTube videos”



23%

“Program offered by an outdoor retailer”



22%

“Join a local hunt club”



18%

“Online forums / blogs”

53% of hunters and 45% of shooters say “friends” are the greatest influence in trying new types of hunting and shooting activities. Generating awareness through editorial content (sharing bear hunting stories and how-to information) in magazines, word-of-mouth through family and friends, providing programs hosted by outdoor retailers, state wildlife agencies and other nonprofit organizations may motivate them to hunt bear.

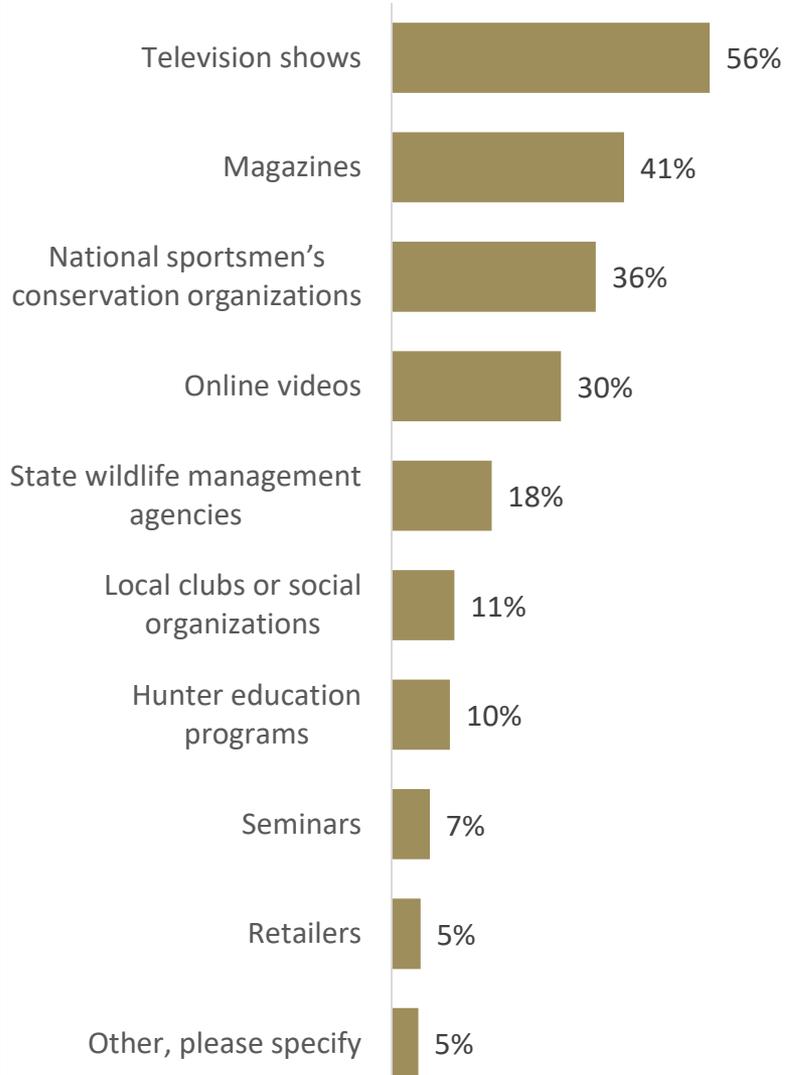


MOST INFLUENTIAL SOURCES FOR TRYING BEAR HUNTING

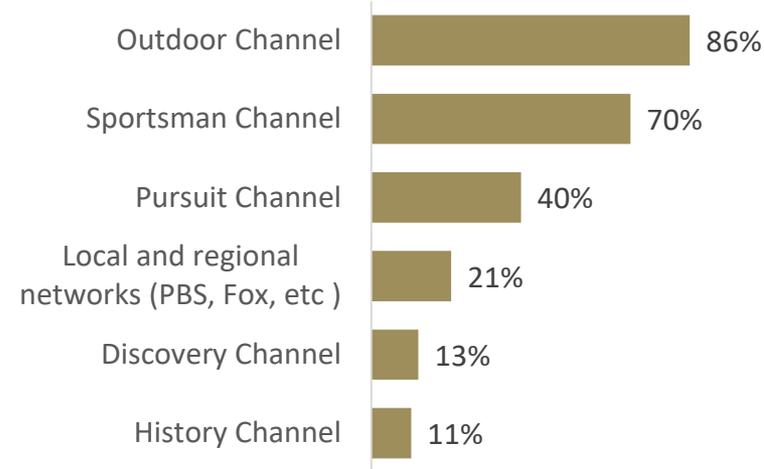
These hunters and shooters can be reached and influenced through television, print and online.



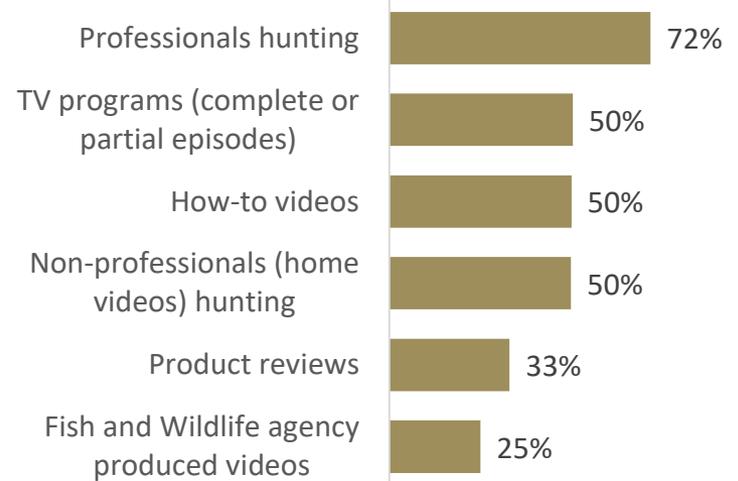
TOP SOURCES



TOP TV CHANNELS



TOP ONLINE VIDEOS



Q: Which of the following media or information sources have had the most influence, or intrigued you the most in regards to trying different types of hunting? (N=2,577); Which type of online videos have you viewed with respect to influencing you to try different types of hunting? (N=2,858). What channel did you watch hunting and fishing programs on? (N=1,431).

Authors / Contributors

Southwick Associates, Inc.

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

National Shooting Sports Foundation

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

