

2015 Hunter Churn & Lifestyle Summary Report

Produced for the National Shooting Sports Foundation



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Background

- ✓ Purpose: To improve hunter outreach and marketing efforts by identifying a) hunting license renewal rates, b) hunters' lifestyle characteristics, and c) who hunts and why.
- ✓ Funded by a USFWS Multi-State conservation grant under the Wildlife Restoration program.
- ✓ This presentation summarizes five detailed reports available at www.nssfblog.com/tag/r3/



METHODS

Collected and standardized 10 years of complete license data for 12 states



Methods

- Per state, we built purchasing histories and profiles for every individual who purchased at least one license
- We surveyed current and ex-license holders to learn why they did or did not buy again
 - This survey was conducted by Responsive Management of Harrisburg, VA
- Analyzed all data using SPSS, Access, and ESRI GIS and lifestyle segmentation data



RESULTS

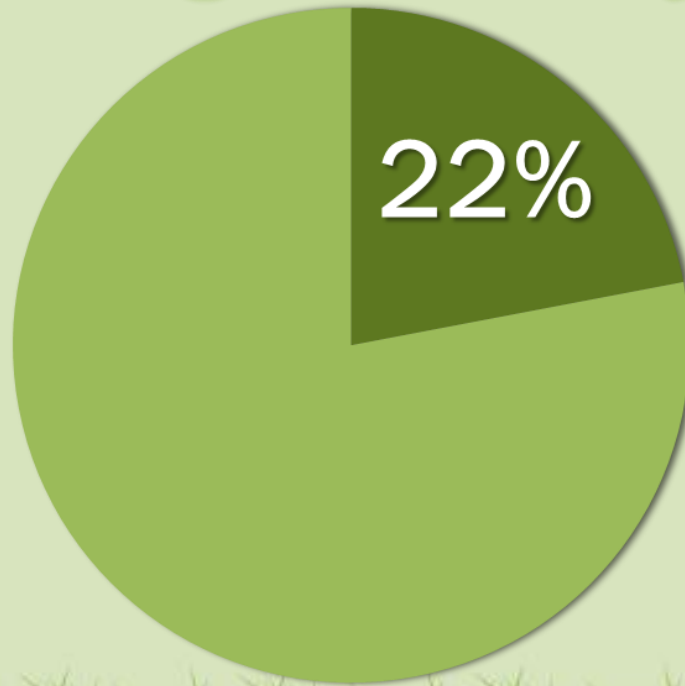
14 Million

People hunt annually,
with just a 2%
change in 10 years



BUT, participation rates are not stable...

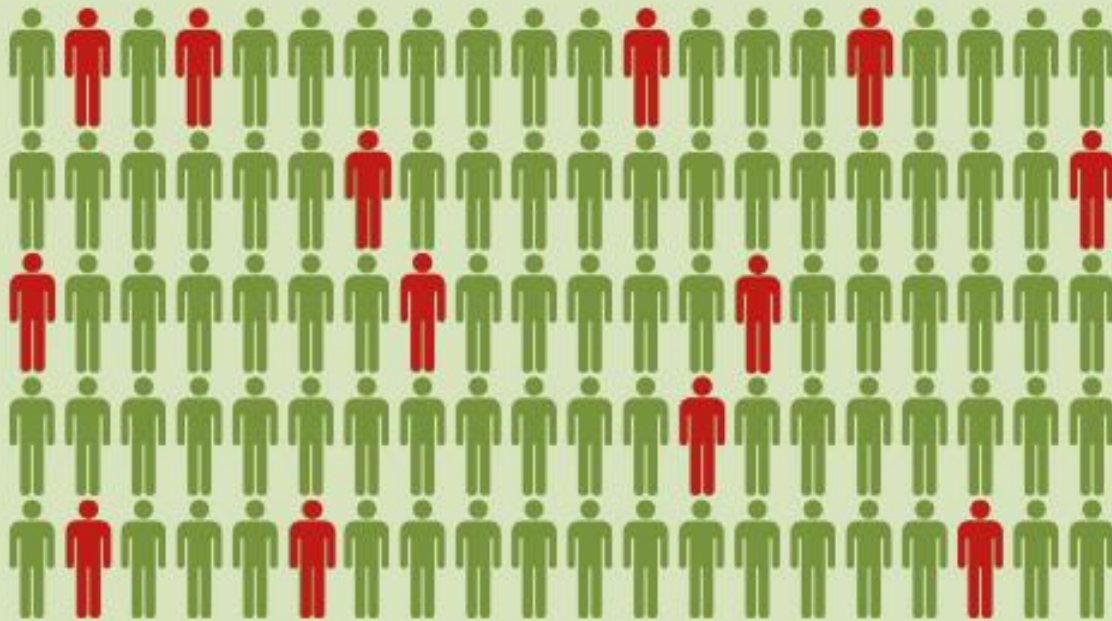
**22% of resident hunters will not renew their
hunting license next year**



**Typical hunters
purchased a hunting
license 2.8 of 5 years**



**13% of hunters purchased a
hunting license in each of
the last 10 years**



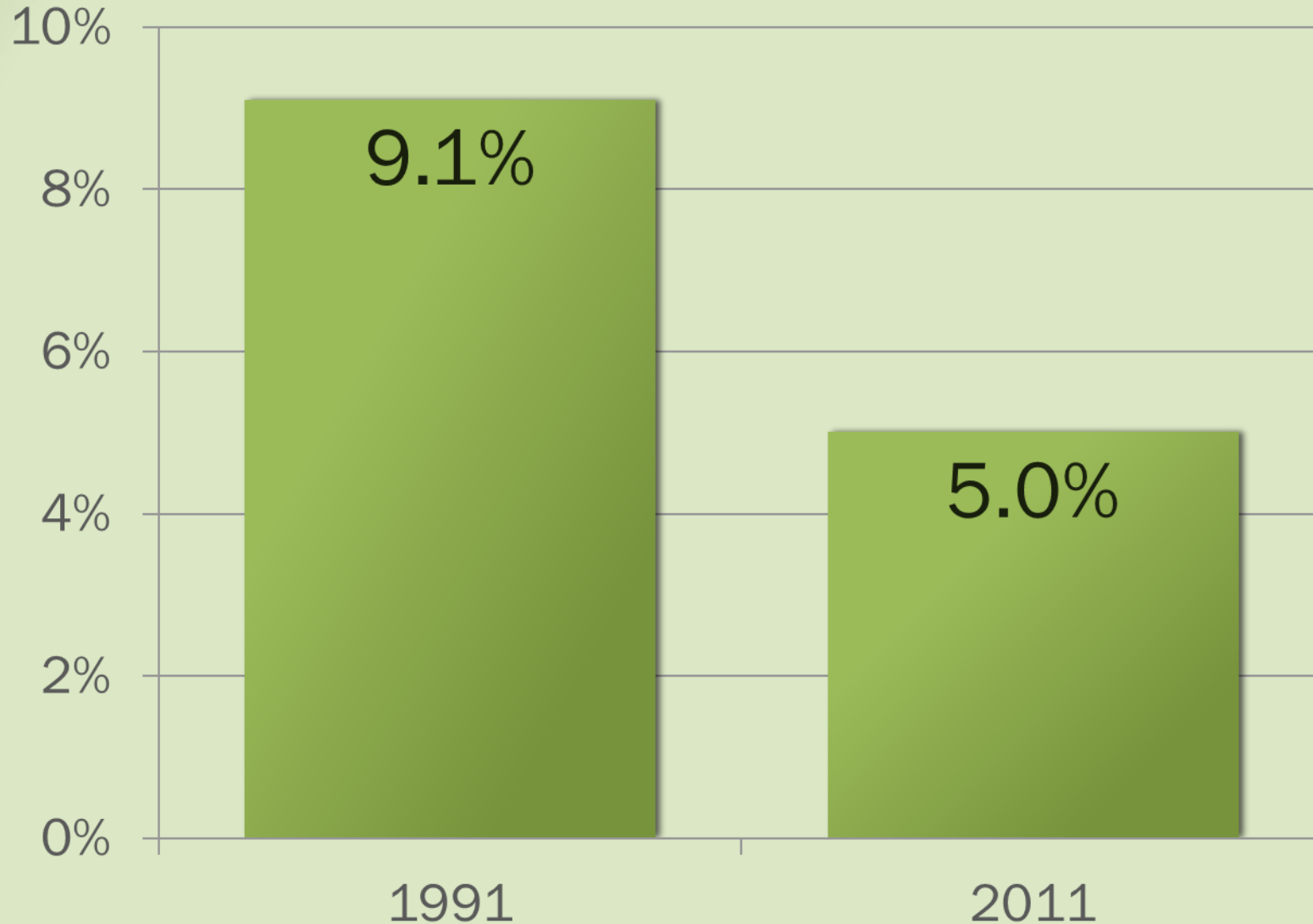
Younger hunters are more likely to not renew their license





**Hunting is falling in
popularity with younger crowds!**

Percent of 16-34 year olds hunting



Hunter Churn by Gender



Definition: The percentage of this year's hunters who will not renew their hunting license next year is much greater among women.



Hunters in rural areas are more likely to renew (74%) than hunters from suburban (71%) and urban (66%) communities



66

Urban



71

Suburban

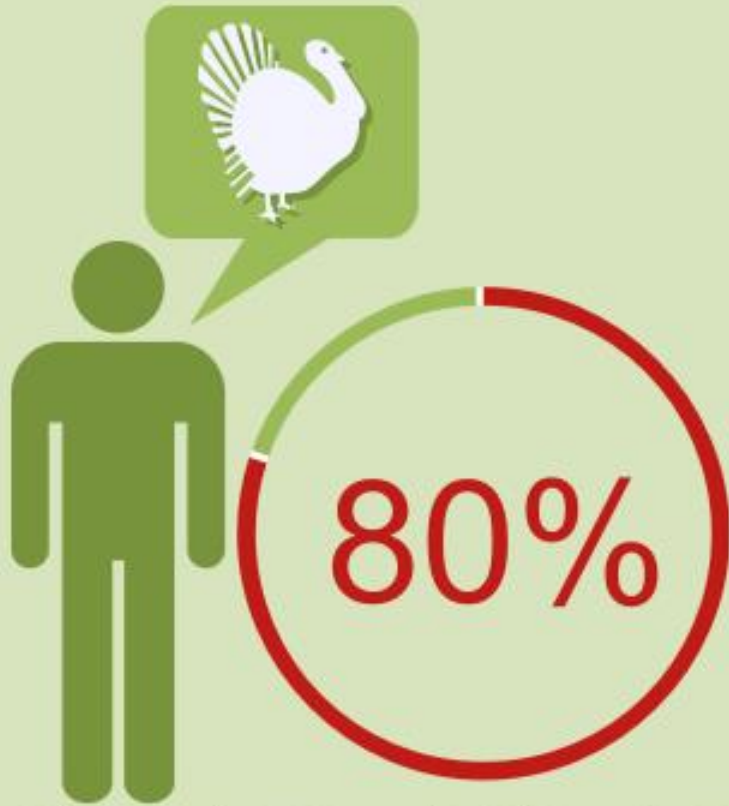


74

Rural



New hunters who **say** they will
hunt in each of the next 5 years...



...Differ from those who **actually**
hunt each of the next 5 years



Hunters who purchase a license **every year** for 5 years



Midwest



Northeast



West



Southeast





RENEWAL CATEGORIES

Renewal Categories

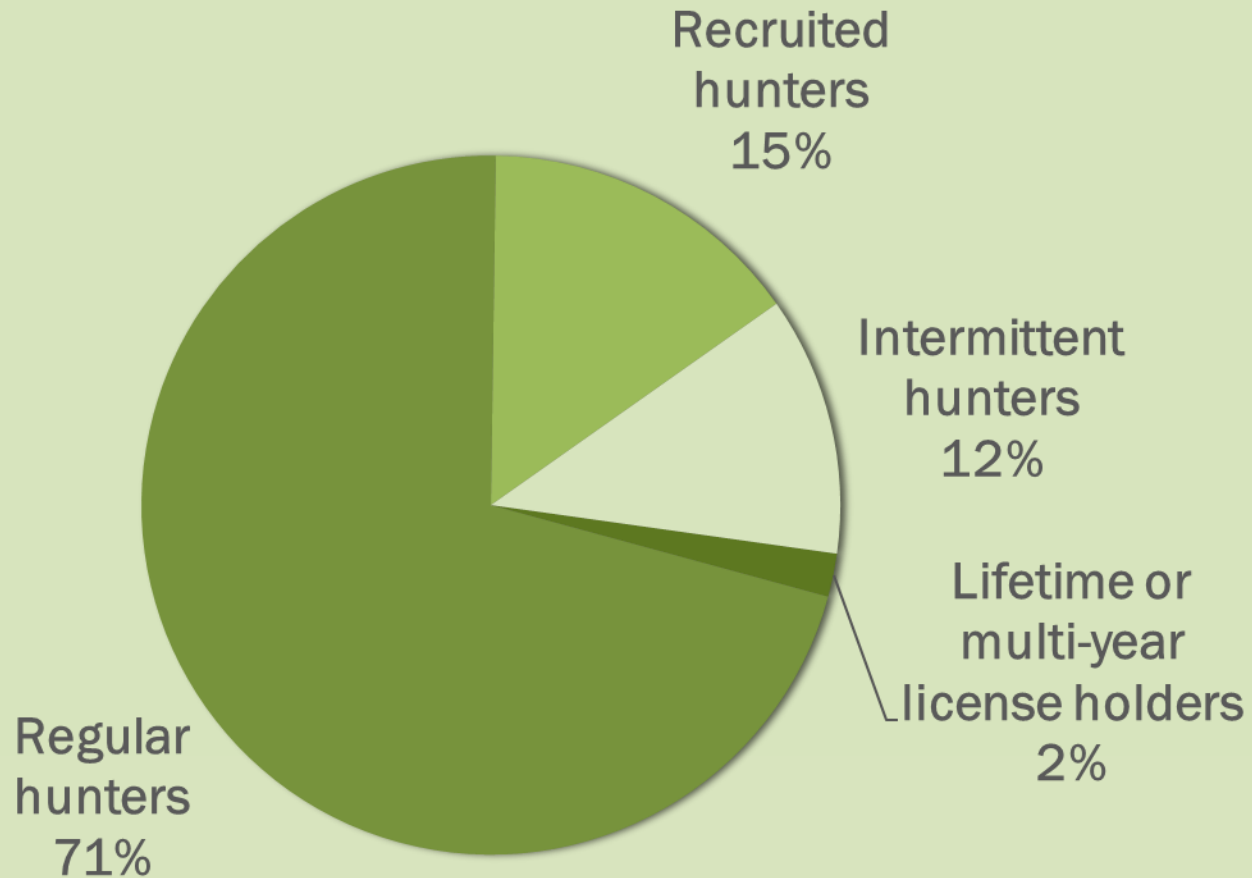
Regular hunters: those who renew their license each year

Recruited hunters: new, or not having been observed buying a license at least once in the past five years

Intermittent hunters: missed at least one year before buying a license again



Renewal Categories



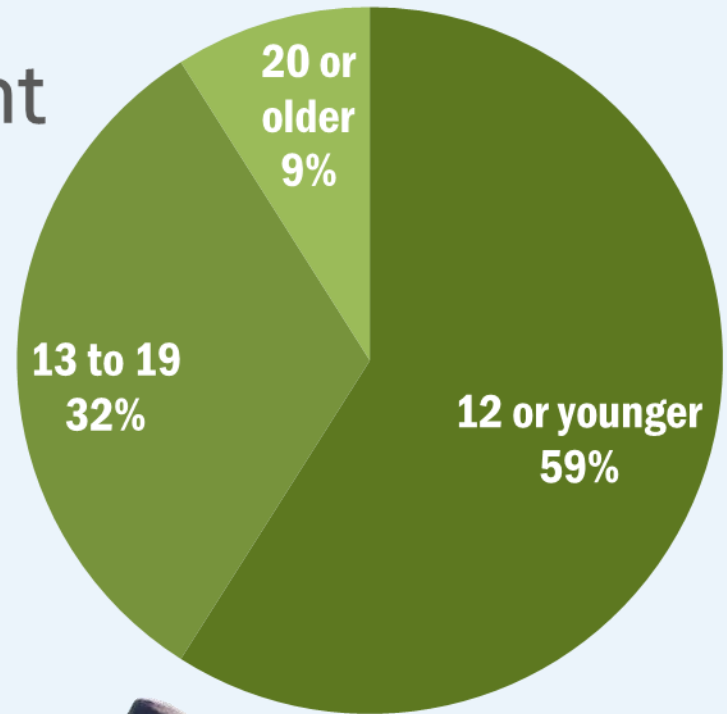
Recruited Hunters by Gender



**Regular, or loyal, hunters are
created early in life.**



Age of First Hunt



Top 3 Prompts to Hunt in a Given Year

Regular Hunters

- Desire to be outside
- Invitation from a friend
- To harvest food

New Hunters

- Invitation from a friend
- Desire to be outdoors
- Moved to a home near huntable lands





RECRUITING MILLENNIALS INTO
HUNTING REQUIRES DIFFERENT
APPROACHES

Recruiting Millennials



Female millennials are more likely to try hunting than other females



Millennials have higher rates of ethnic diversity – package the hunting experience accordingly



Recruiting Millennials



Unlike others, the top reason for Millennials to hunt is to harvest their own meat, followed by spending time with friends and family

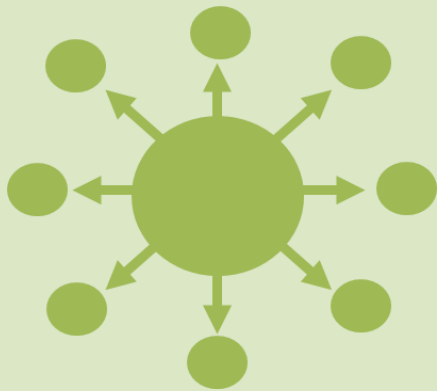


Millennials lean on friends, family, and state agency websites for information



Position hunting as a “can’t miss annual activity” or tradition





LIFESTYLE SEGMENTATION

Lifestyle Segmentation

- People with similar lifestyles, attitudes, and interests typically live in neighborhoods populated by similar people
- By understanding hunting's various segments we can identify neighborhoods:
 - Where hunting is popular,
 - Where more products will sell, and
 - Where to recruit more hunters



Lifestyle Segmentation Method

- Obtained hunting license sales records from 12 state agencies
- Analyzed license data from 12 states with ESRI's Address Coder™ and Tapestry™ lifestyle segmentation software and data.
 - Lifestyle software shows the preferences, consumption habits, stages in life and more for every U.S. household.
 - Every U.S. household assigned to one of the 14 distinct neighborhood types, known as LifeModes
 - LifeModes are then divided into a total of 68 detailed segments



LifeMode Groups

Top 10 Hunting LifeMode Groups

Cozy Country Living

Rustic Outposts

Family Landscapes

GenXurban

Affluent Estates

Middle Ground

Ethnic Enclaves

Hometown

Senior Styles

Midtown Singles

People in these communities are

twice

as likely to hunt
than the average American



Top 4 of 12 Lifemode groups account for:



Licensed hunters



U.S. population



Cozy Country Living

LifeMode Group

30.7%
of U.S. hunters

Country
Living

#1 of 12 LifeMode Groups among hunters



Caucasian, older empty-nesters



Politically conservative



Cost conscious, purchase items made in the U.S.A.



Outdoor lifestyle includes gardening, hunting & fishing



Do-it-yourselfers who maintain their own homes, vehicles and property



Tapestry Segments

Top 10 Hunting Tapestry Segments

Southern Satellites

Green Acres

Salt of the Earth

Middleburg

Rooted Rural

Rural Resort Dwellers

Rural Bypasses

The Great Outdoors

Soccer Moms

Prairie Living

People in these groups are

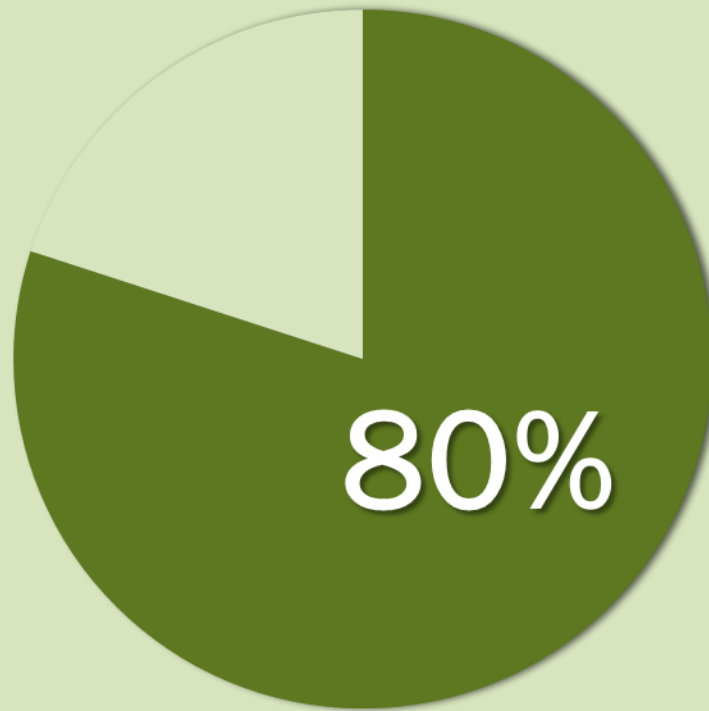
2 to 3 times
more likely to hunt

than the average American



See [Appendix](#) for descriptions of each of the top 10 tapestry segments

Top 20 of 68 Tapestry Segments provide 80% of hunters



Southern Satellites

Southern Country Folks

10.7%
of U.S. hunters

Rural South

#1 of 68 tapestry segments among hunters



Slightly older, married couples



Blue collar jobs



Lower income, cost conscious



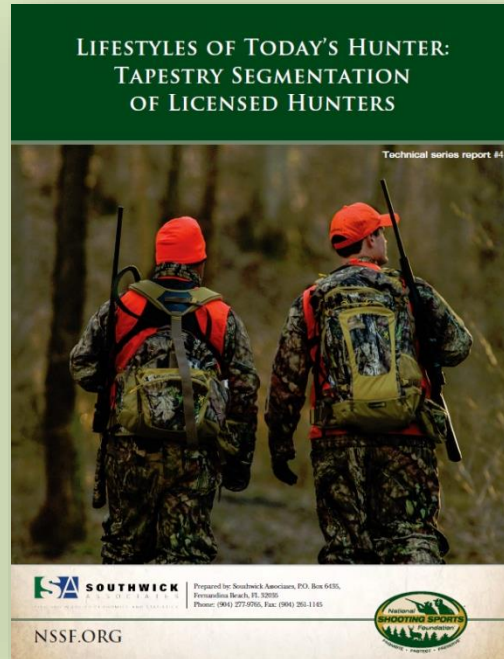
Hunt and fish



Obtain information from TV,
listen to country music



See the reports for details and more insights



www.nssfblog.com/category/r3/

Question? Contact Southwick Associates:

info@southwickassociates.com

Acknowledgements

- National Shooting Sports Foundation
- Southwick Associates
- Association of Fish and Wildlife Agencies
- USFWS Multi-State Grant program
- Each of 12 participating states
- Responsive Management



APPENDIX: TOP 10 TAPESTRY SEGMENTS

Southern Satellites

Southern Country Folks

10.7%
of U.S. hunters

Rural South

#1 of 68 tapestry segments among hunters



Slightly older, married couples



Blue collar jobs



Lower income, cost conscious



Hunt and fish



Obtain information from TV,
listen to country music



Green Acres

Outdoorsy & Self-reliant

8.0%
of U.S. hunters

Rural
Acreage

#2 of 68 tapestry segments among hunters



Slightly older, married couples



Mostly white collar jobs



Affluent do-it-yourselfers



Outdoor lifestyle includes
gardening, hunting & fishing



Active in their community



Salt of the Earth

Traditional Rural Living

6.3%
of U.S. hunters

Rural
Midwest

#3 of 68 tapestry segments among hunters



Slightly older, empty-nesters



Manufacturing and related industries



Average income



Outdoor sports and activities including hunting and fishing



Prefer to conduct their business in person and not online



Middleburg

Suburb Meets Country

5.5%
of U.S. hunters

Semi-Rural
Subdivisions



Younger couples with children



Easy-paced country living
paired with suburbia



Thrifty and prefer to purchase
American-made items



Conservative and
family-oriented



Tech savvy



Rooted Rural

Forests for Work & Play

5.5%
of U.S. hunters

Eastern
Mountain
Woods

#5 of 68 tapestry segments among hunters



Married, few with children living in Appalachian mountains



Forestry and related jobs



Lower income, thrifty shoppers



Outdoor lifestyle including hunting and fishing



Prefer to conduct their business in person and not online



Rural Resort Dwellers

Rural & Ready to Retire

5.4%
of U.S. hunters

Resort
Areas in
Midwest

#6 of 68 tapestry segments among hunters



Married couples nearing retirement



Blue collar jobs



Moderate income



Passionate hunters and anglers



Satellite television and dial-up internet



Rural Bypasses

Simple Southern Living

5.2%
of U.S. hunters

Open
Areas in
the South

#7 of 68 tapestry segments among hunters



Married or single with no children at home



Blue collar jobs



Low income, thrifty spenders



Outdoor lifestyle includes hunting and fishing



Obtain information from TV, limited internet use



The Great Outdoors

Active outdoors

4.7%
of U.S. hunters

Small
Towns

#8 of 68 tapestry segments among hunters



Educated empty-nesters
nearing retirement



Service jobs, nearing retirement



Modest income, likely to invest
in real estate



Active outdoor lifestyle includes
hiking, hunting and fishing



Not dependent on technology,
but use it lightly



Soccer Moms

Parenting Professionals

4.2%
of U.S. hunters



Two working parents with
school-aged children



Professional positions in nearby
cities



Affluent and willing to pay for
time-saving services



Family-oriented activities,
bicycling, golfing, boating

Suburban
Living



Tech savvy



Prairie Living

Midwestern Farmers

4.0%
of U.S. hunters

Rural
Midwest



Married, few with children
living at home



Self-employed farmers



Modest income, making needs-
based purchases



Activities include fishing,
hunting, boating, and camping



Prefer to conduct their business
in person and not online

