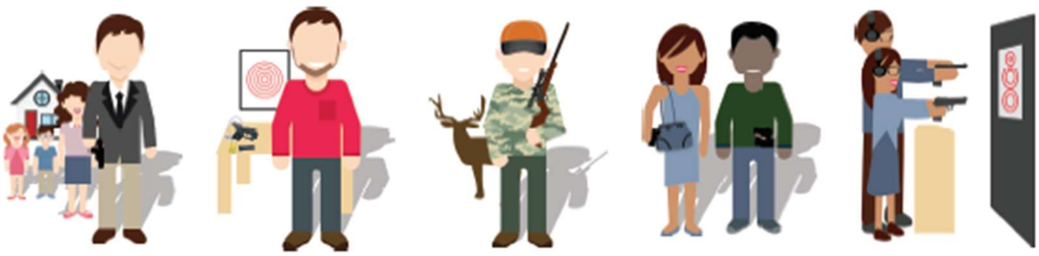
2020 Firearm Consumer Personas

Phase I Report



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On behalf of the:

NSSF The Firearm Industry Trade Association

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Introduction

People purchase products to satisfy an internal need or desire. Therefore, marketing to audiences based on their physical appearance – such as to young males or Hispanics collectively – will often minimize results compared to marketing towards peoples' core needs and desires. This study segments firearm purchasers based on their motivations to purchase a firearm and provides personas for each unique segment. These segments together represent the entire U.S. consumer market for firearms from 2016 through 2020. This report updates a landmark segmentation study released by the National Shooting Sports Foundation (NSSF) in 2016.

Efforts to increase firearm ownership, to increase sales of ones' own brands or to promote the shooting sports collectively can all achieve greater success by understanding the different reasons why people decide to purchase firearms and their motivations for selecting specific types.

The five major segments, or personas, comprising U.S. firearm owners in 2020 are:

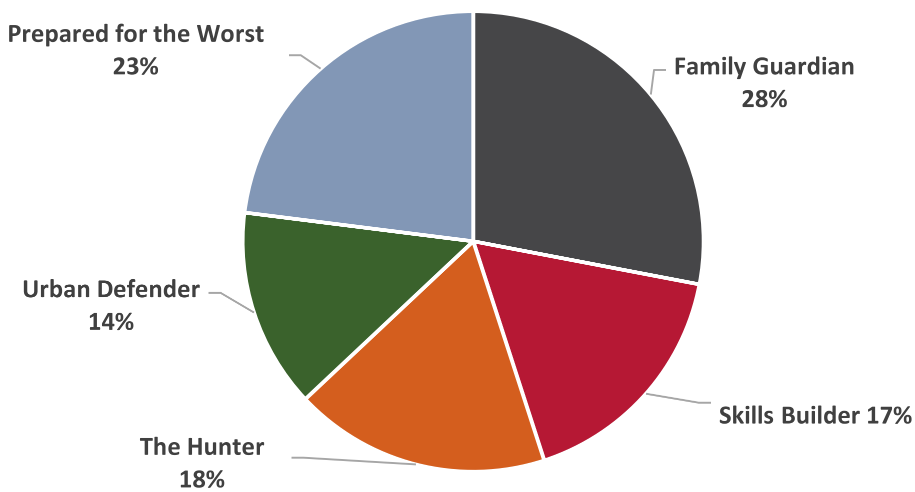

TABLE 1. THE FIVE MOTIVATIONS-BASED FIREARM OWNER SEGMENTS

	Percent	Primary Reasons to Purchase
Family Guardian	28%	Sense of security, Proficient skills, Confidence/empowerment
Skills Builder	17%	Proficient skills, Fun/relaxation
The Hunter	18%	Provide own food, Fun/relaxation, Challenge
Urban Defender	14%	Wants a sense of security away from home and at-home
Prepared for the Worst	23%	To be ready in case of trouble, Proficient skills
Total	**N=1,173**	

Three of the five segments are protection focused (Family Guardian, Urban Defender and Prepared for the Worst). The other two – the Skills Builder and The Hunter - are also interested in purchasing firearms for protection purposes, but other very different reasons also drive their buying decisions.

The rest of this report provides detailed results for each of the five segments, or personas. A profile of the average firearm purchaser is also presented for comparison purposes. Visual playing fields are included to help demonstrate the differences between segments based on key motivations for acquiring a firearm. Also included is a brief discussion on data sources and methodology. A four-page visual summary of the segments is available from www.southwickassociates.com.

In the near future, a second phase report explaining each persona's product preferences, paths to purchase and marketing/advertising insights will be offered. Additional reports covering specific markets will also be released. If any questions arise or if custom research is needed, please contact Nancy Bacon at Nancy@SouthwickAssociates.com.

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Data and Methods

This study defined firearm buyers as anyone who purchased a firearm between 2015 through 2020. This time frame was selected as the previous NSSF segmentation study examined firearm owners who purchased from 2000 through 2015.

The survey was fielded twice to generate necessary data. The initial survey was fielded in June 2020; however, rapid shifts were being reported in the firearms market related to COVID-19 and social unrest. Therefore, after a pause, the survey was re-fielded in November through December 2020. A total of 1,173 valid responses were collected.

The U.S. general population was sampled. This approach enabled quantifying the size of each segment, their motivations towards ownership, activity and firearm preferences, demographics and more. Due to the risk of "trolls and gamers" in any survey, numerous data quality questions and checks were included in the survey to exclude dishonest or misleading respondents and to exclude non-owners in opposition to firearms. All survey responses were weighted to ensure the results represented the U.S. population. Weights were primarily based on age, geographic region and gender.

The reported percentages in the tables are subject to sampling variability, often called the "margin of error". This is typically described in terms such as "± 5% at a 95% confidence level." Because the margin of error is determined by the number of respondents for each reported number, the margin of error will vary. For this reason, we include "N=" at the bottom of each table to denote the *number* of responses used as a general indication of statistical reliability. For reference, a sample of 400 respondents will typically have a margin of error no greater than ± 5% at a 95% confidence level.

Finally, the "K-means clustering" statistical technique was used to identify the segments. Survey respondents were grouped based on shared motivations (Table 1). Respondents were also asked to rank their motivations and preferences, allowing comparisons across each segment. Given that nearly all respondents indicate self-defense as a motivation for purchasing a firearm, those who reported owning for the primary purpose of self-defense were also asked to expand on their motivations. With these results, better separation between the segments was developed.

TABLE 2. LIST OF SEGMENTATION VARIABLES

To provide safety / protection for myself and others *at home*
To provide safety / protection for myself and others *away from home*
To have fun
To acquire a firearm before sales are further restricted
To spend time/participate with my family and friends/peers, or to impress my friends
To develop shooting skills / become proficient
To hunt for meat
To hunt for recreation
To have the best/newest gear
To know this type of firearm better
I didn't have this type of firearm before
To add to my firearm collection

The "Average" Owner

A better understanding of the five segments is possible by first understanding the "average" firearm owner. It is important to note that in marketing, efforts to communicate with the "average" firearm owner will not succeed very well as this individual does not exist. The motivations to buy a firearm vary significantly across firearm owners. As a result, product preferences, firearm uses, and shopping habits will also vary. Therefore, effective marketing efforts will target segments that best fit the promoted product or activity. The detailed tables presented in the appendix open with statistics regarding the "average" firearm owner for comparison purposes only.

The "average" or typical firearm owner is a 45-year-old white male who earns roughly $75,000 annually. Thirty-nine percent are female, and these females are more likely than men to purchase firearms for protection purposes. Roughly 16% define themselves as being nonwhite, with African Americans comprising 11% of firearm owners. 17% of firearm owners describe themselves as Latino. The majority are married and living in the suburbs. Half live in households containing children. Most describe themselves as dependable, followed by level-headed, protective and outdoors oriented. Protection for themselves and others at and away from home is the top motivation for purchasing a firearm, along with a desire for a better sense of security and developing shooting skills. When asked why they purchased a firearm for protection purposes, the top reason is a desire to rely on themselves for protection, not others.

Roughly 40% have never been hunting and most only participate in target shooting less than six times a year. Approximately 30% shoot only once a year or less. Less than half consider themselves to be very knowledgeable about firearms. Handguns are their preferred firearm and target shooting on paper or formal targets is their preferred type of shooting.

When it comes to their purchases, reliability followed by quality are the top drivers. When asked to describe satisfactions received from target shooting, most will say developing shooting skills is tops followed by building confidence. For those who hunt, top satisfactions include fun and adventure followed by providing their own food.

The Five Segments, or Personas

This project defines the U.S. firearms market as anyone who purchased a firearm from 2015 through 2020. Once the overall pool of firearm purchasers was identified, they were first analyzed to develop the persona of the average firearms purchaser, then divided into major segments.

There are many ways to segment any audience. This project divides the U.S. firearms market into five major segments that were shown to have statistically significant differences based on their motivations to purchase a firearm.

Each of these segments, or personas, could be broken down further by motivations, preferred products or activities, geographic distribution and more. Such divisions are possible through custom research to guide focused marketing and new business development efforts. Attempting to further divide each persona into subsections would result in an unwieldy report.

Please note that personas are not exclusive to any specific demographic or user group. For example, hunters can be found in all five personas. Also, women can be found in all personas, as can members of any age, ethnic, racial or other demographic breakout. Just because two people look alike does not indicate they share the same motivations to purchase a firearm or any product.

If needed, segmentation insights can be custom developed for most niches within the firearms and accessories industry. Please contact Southwick Associates with any needs or questions.

The following pages present profiles for each persona followed by an appendix with greater details.

Family Guardian

28% or 9.6 million owners

This segment's firearm ownership is motivated by a desire to protect themselves both at and away-from-home. Unlike the other two protection-oriented segments (Urban Defender and Prepared for the Worst), the Family Guardian is less concerned about becoming proficient with their shooting skills. This owner is second only to the Urban Defender in buying firearms now before sales are further restricted. Key reasons that separate the Family Guardian from the other segments is the desire to purchase a firearm to gain a sense of independence, to build confidence and to feel empowered. This segment has the highest rate of having never been target shooting prior to purchasing a firearm. The Family Guardian has a slightly lower rate of target shooting participation compared to the other personas.

The Family Guardian is 42% female, 86% white. Roughly 17% identify as Hispanic. Just over 15% identify as African American, Asian or other. Thirty-one percent are between the ages of 25-44. Their average household income is $74,800. Most members are or have been married at one point and are mostly found in suburban communities. Half of their households have children, grown or still under the roof. When asked, the Family Guardian will describe him or herself as dependable, levelheaded, and protective. Confident and outdoors-oriented also come into play. Along with Prepared for the Worst, the Family Guardian has the lowest level of firearms knowledge or experience. Their preferred firearms are semi-auto handguns and revolvers.

Skills Builder

17% or 5.8 million owners

The youngest of all segments, the Skills Builder is motivated to purchase a firearm primarily to develop shooting skills. They also greater than average in regard to using a firearm as a means to socialize with friends and family. When purchasing firearms, they are more likely to seek the best and newest gear out of a desire to know different types of firearms. They are least motivated to purchase a firearm before sales are further restricted, and, along with The Hunter, have the lowest level of purchasing a firearm for protection purposes. They are the segment most likely to teach others how to shoot or hunt.

The Skills Builder is a fairly active shooter and hunter, with half hunting at least once per year, and more than 80% shooting at least twice a year. They mostly target shoot, although they also shoot clays at higher rates than other segments. They enjoy shooting to master their shooting skills and to relax. They hunt for fun, to carry on tradition, and for exercise. Self-described as outdoorsy and dedicated more than other firearm owners, this persona views firearms as recreational means rather than a protection tool. They report that they are likely to purchase more firearms in the future, and value new, cutting edge technology.

One-third of Skills Builders are female while 86% are white. Roughly 18% identify as Hispanic and 16% identify as African American, Asian or other. The typical Skills Builder is 45 years old and has an average household income of $76,700. Next to the Urban Defender, the Skills Builder has the second highest rate of living in urban areas. Over half do not have children. When asked, the Skills Builder will describe him or herself as dependable, outdoors-oriented, levelheaded, and protective. They report average levels of firearms knowledge and experience with firearms. Two-thirds live in suburban and urban areas. After the Hunter, the Skills Builder has the second highest level of interest in modern sporting rifles and black powder/muzzleloaders.

The Hunter

18% or 6.1 million owners

Aptly named, this segment has the highest rate of purchasing firearms for hunting purposes.[1] The Hunter has a lowest rate of purchasing firearms for protection. To acquire a firearm before further restrictions are placed on sales is also a lower ranked reason to purchase, but is still one of the reasons for one-third of their purchases. More than any other segment, The Hunter sees firearms as means to spend time and participate in activities with family, friends and peers. Acquiring meat was the top reason for the most recent firearm purchase and to obtain a type of firearm they did not own before. Along with the Skills Builder, having the best and newest gear and knowing new types of firearms are important motivators when purchasing a firearm. More than any other segment, The Hunter states having adventure as a reason for their latest firearm purchases, along with participating in activities that provide challenges, relaxation and/or a sense of accomplishment.

It's not all about hunting. The Hunter maintains average interest in target shooting and while they have the lowest level of interest in protection, 75% still state protection as one of the drivers for their most recent firearm purchase, just not a top driver. Adding a new firearm to the collection was important for roughly 30% of this segment's most recent firearms purchase.

Of all personas, The Hunter has the highest percentage of Caucasians (88%) and has the highest proportion comprised of Hispanics (21%). The average member is 47 years old and has a household income of $77,400. One-third have never been married. The Hunter is more likely to live in rural areas than other segments, yet still over half live in suburban and urban neighborhoods. As with most personas, about half do not have children. As with all segments, when asked how to describe themselves they will first say dependable. Other words to describe themselves include outdoors-oriented, level-headed, protective and trusting. The Hunter reports the highest rates of being very knowledgeable about firearms. They have the lowest rates of purchasing semi-auto handguns as their most recent purchase but have the highest rates of purchasing long guns of all types.

[1] Not all members of this segment actually hunt. About 15% never have hunted before. However, their motivations for their recent firearm purchase closely mesh with others in this segment included lower levels of target shooting interest, higher long gun interests, social reasons for owning, wanting to add to their collection and more.

Urban Defender

14% or 4.8 million owners

This persona, the Urban Defender, has the highest rate of purchasing firearms for self- and at-home protection. The segment is most likely to be found in urban communities. Their desire to own a firearm is frequently borne of a bad experience, not trusting others around them, and at the encouragement of family and friends. More than any other segment, the Urban Defender wants to acquire firearms before sales are further restricted. They have among the lowest rates of interest in hunting, of wanting the latest new gear or adding to a personal firearms collection. Encouraging greater purchases by promoting the fun and social aspects of firearm ownership will not play well to this group.

The top reason for their most recent firearm purchase is feeling unsafe away from home, followed by feeling unsafe at home. This segment has a high rate of purchasing a firearm without having been shooting before. Their top satisfactions from target shooting include developing shooting skills, building confidence and achievement. When asked why they chose a firearm for protection, they state they want to rely on themselves and not others. However, more than other segments, they state they do not trust others around them, meaning others in their community, as a reason for owning a firearm.

The Urban Defender, along with the Prepared for the Worst segment, has the highest rate of ethnic diversity, but is still nearly 80% white. Their age, household income and marital status matches the average US firearm owner. The Urban Defender has the highest rate of no children in the household, and the highest rate of living in urban and suburban areas. Words commonly used to describe themselves include protective and level-headed. Despite having among the highest rate of never having been target shooting before their most recent firearm purchase, the Urban Defender has the highest rate of target shooting more than once a month, probably as they become familiar with their new purchase, but then they may participate less frequently once they are comfortable. Semi-auto handguns are their preferred firearm. When shopping, the Urban Defender values lightweight and concealability. The Urban Defender purchased firearms at rates higher than any other segment in 2020, reflecting this segment's rapid growth in recent years.

Prepared for the Worst

22% or 7.9 million owners

Prepared for the Worst's top reason for owning a firearm is to gain a sense of security. While target shooting is of interest, they shoot primarily to develop their firearm skills. Unlike the Urban Defender, they are not in a situation where they feel unsafe at- or away-from-home, but they want to be ready to handle any dangerous situation. While not as active at shooting ranges as the recreation-oriented segments, Prepared for the Worst will visit ranges with a desire to master their shooting skills and build confidence. They have little interest in using a firearm to engage socially with others. Firearms are a protection tool versus a means to have fun. Words that best describe their satisfactions from target shooting relate to developing shooting skills, building confidence and empowering themselves.

Prepared for the Worst has a slightly higher percentage of female and African American members than the other personas. Of all personas, Prepared for the Worst contains the lowest percentage of full-time employees, consisting of 11% homemakers, 18% retirees and 8% unemployed. As a result, this segment also reports the lowest average income of all segments. Almost half reside in suburban neighborhoods. They describe themselves as dependable, level-headed and confident. Prepared for the Worst reports they are quite deliberate in their firearm purchases, that they tried multiple firearms plus visited multiple retailers prior to making their purchase. Like the other protection-primary segments, semi auto handguns are preferred.

Prepared for the Worst actively works to develop their skills, with 85% reporting shooting more than once a year on average. They are motivated to provide protection by the encouragement of family and friends, their wish to rely on themselves and to be in control. With their desire for protection at and away from home, it makes sense that they value concealability and reliability. Coupled with their research diligence prior to purchase, it also is logical that they value recommendations from people they trust.

The “Playing Field”

A visual way to compare the personas is through the use of a ‘playing field.’ By plotting each persona on a graph or ‘playing field’, based on their key motivations, differences can be highlighted, helping to identify the persona(s) that best fit a specific product or goal. These personas then become one’s target audience. Examples of playing fields are presented here. Additional playing fields can be created using any characteristic or motivation provided for the personas in this report.

The figures below show playing fields that provide the greatest level of separation between personas. Figure 1 maps the personas based on purchasers’ preferences for improving their shooting skills compared to the desire to own the best and latest technology in a firearm. The three personas on the left half of the playing field have below average interest in obtaining the best and latest technology in a firearm while the two personas to the right (Skills Builder and The Hunter) demonstrate above-average interest in the latest firearms technology. Segments above the horizontal line - the Skills Builder and Prepared for the Worst - have above- average interest in improving their shooting skills. By understanding which segments best relate to existing products, businesses can improve their targeted marketing efforts plus help identify potential new products that better fit underserved segments.

Figure 1. Develop & Improve Skills - Important

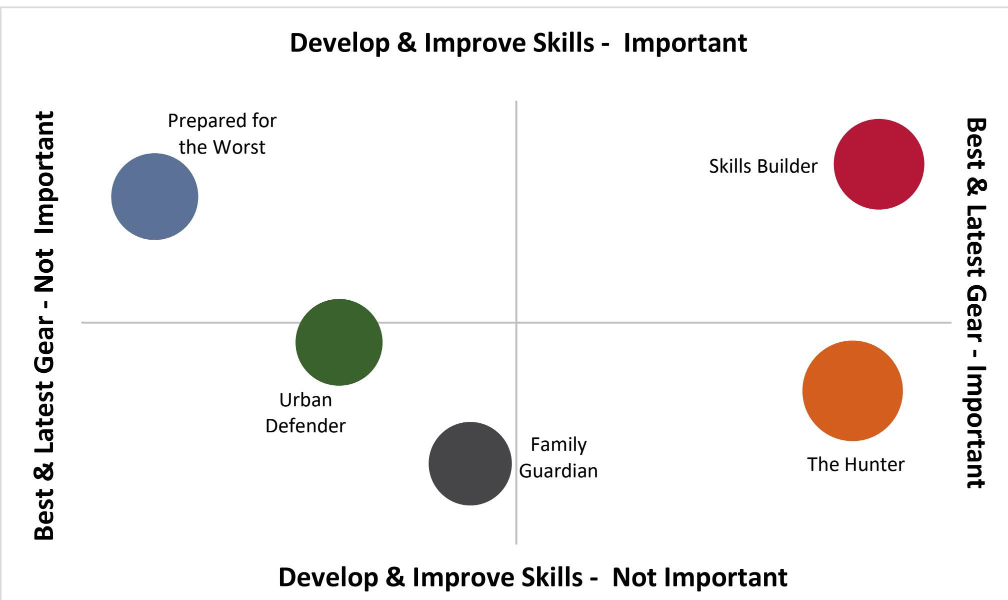
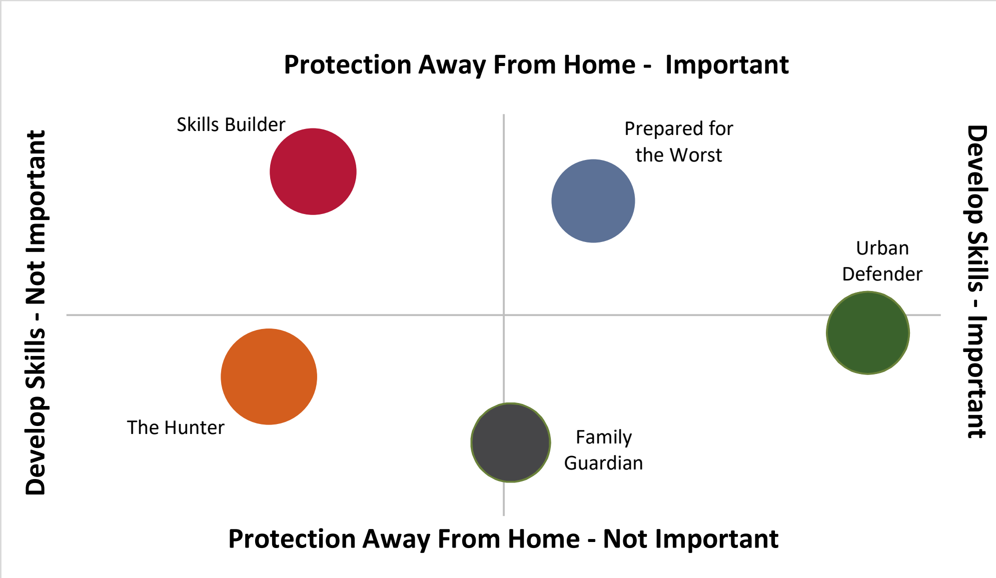


Figure 2. compares the importance of obtaining a firearm for protection away from home to the desire to improve one's shooting skills. The results show Prepared for the Worst is above average in both the desire to improve shooting skills and to be protected away from home, while The Hunter under-indexes on both these points.

Figure 2. Protection Away from Home - Important



The playing field in Figure 3 focuses on motivations that tend to be relatively more important to hunters. We can see the two segments with the greatest hunting interests are found far to the far right, meaning the social aspects one can receive from firearm-related activities is very important to these segments. Likewise, these two segments are above average when it comes to the importance of obtaining meat/food with their firearm.

Figure 3. Meat/Food - Important

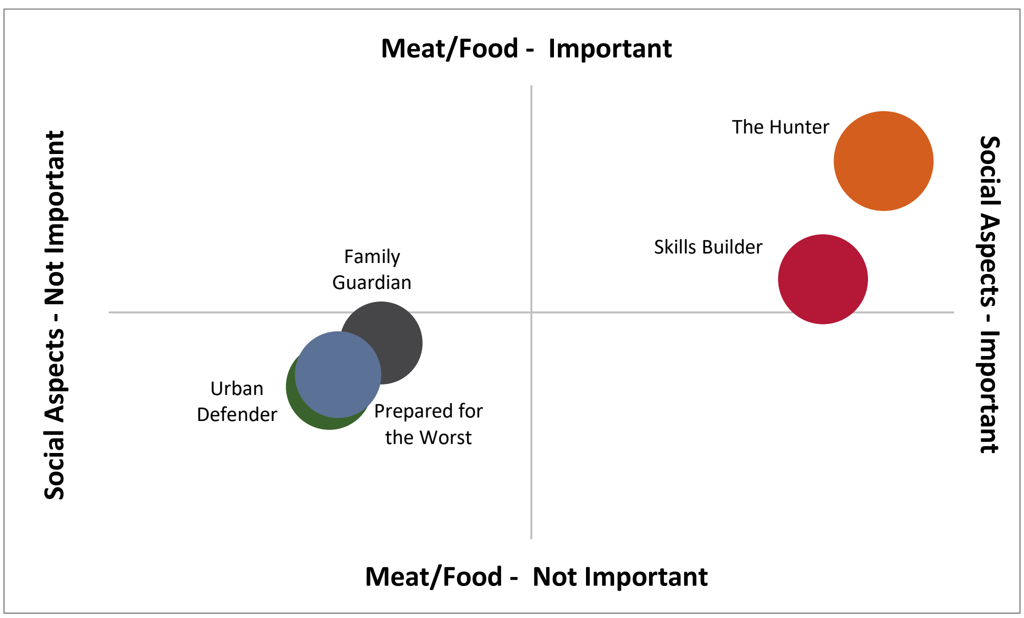
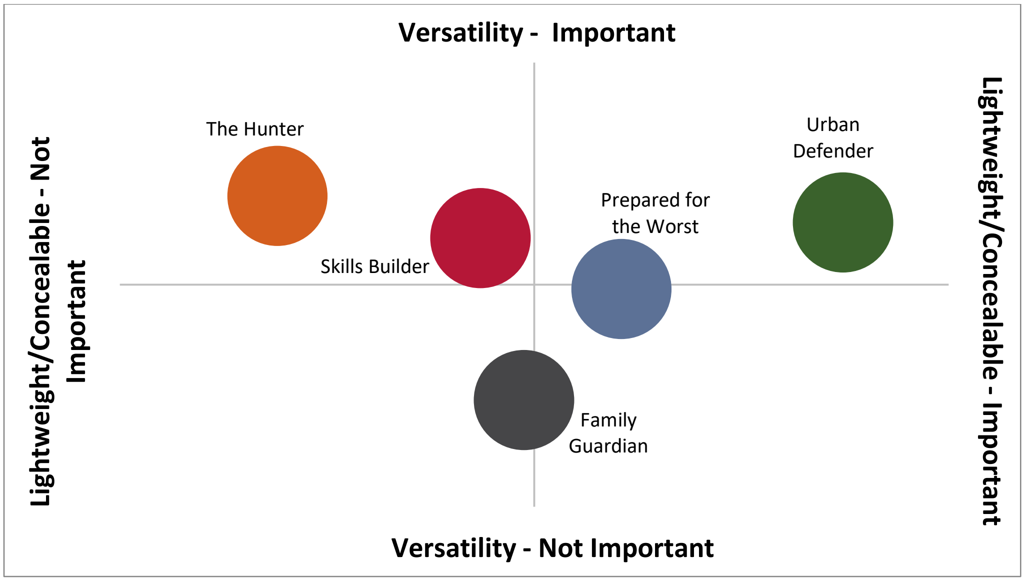


Figure 4 shows how playing fields can also highlight the differences in peoples' purchase drivers, which are the product characteristics one finds important when buying a product. For firearms, purchase drivers can include quality, reliability, lightweight/concealable, recommended, innovative, good value, versatility and more. Figure 4 compares versatility with lightweight/concealable. The Hunter is less concerned about lightweight and concealability than any other segment but is most likely to value versatility, wanting to use his or her firearm for multiple types of activities. The Urban Defender by far is the most interested in lightweight and concealable firearms, given his or her interest in protecting themselves away from home.

Figure 4. Versatility - Important



Playing fields can be developed for any two motivations for buying a firearm, product preferences, anticipated uses, demographics and more. While the possible combinations seem almost infinite, the playing fields shown here demonstrate the potential benefits possible from consumer segmentation insights. The next report in this consumer segmentation series will focus on each persona's product preferences and pathways to purchase and will provide playing fields focused on these topics.

Differences Between the 2016 & 2020 NSSF Firearm Consumer Segmentation Efforts

This report updates the original NSSF consumer segmentation report released in 2016 that identified the personas comprising all firearm purchasers from 2000 through 2015. The firearm market has changed substantially since that time. While the improved statistical procedures used in this update do not permit scientific comparisons between the two reports, general observations about the shifts in the market can be made.

The original NSSF consumer segmentation report Identified eight unique segments that comprised the US firearms market. Some of these segments still exists, albeit with some minor changes such as purchase preferences, willingness to spend and more. The segments that were not continued in the latest study were dropped as statistical differences could not be found. This does not mean these firearm owners no longer exist. Instead, as these segments evolved over the past five years the differences between them narrowed to the point where a separate segment was not merited.

The following presents the original 2000- 2015 segments and some general thoughts about how they evolved and where they fit within today's market:

<u>The Protector</u> (26% of the 2000- 2015 market) - The largest segment, the Protector was typically a family-oriented professional with slightly above average income. They did not describe themselves as outdoorsy, but strongly defined themselves as protective of their families and home.

The Protector is mostly today's Family Guardian segment, who makes up 28% of the U.S. firearms market. Some members of the previous Collector segment are also now in the Family Guardian segment.

<u>Urban Recruit</u> (4% of the 2000- 2015 market) - Urban Recruits had lower income, were price conscious and sought versatility in their firearm purchases. Largely urban and suburban, these relatively new owners had the highest proportion of minorities (25%), low rates of target shooting participation and the highest rates of law enforcement and military background.

While a relatively small, emerging segment in 2015, this segment has experienced the fastest growth in the past five years and is now referred to as the Urban Defender. Not as young as before, this segment now represents 14% of the US firearms market.

<u>Guardian Gary</u> (15% of the 2000- 2015 market) - Guardian Gary was a slightly older buyer who was more likely to define himself as tech-savvy, analytical and old-fashioned. He was not a hunter but enjoyed the outdoors. Personal protection away-from-home is a lesser concern than keeping the home front safe and was not interested in recreational shooting.

Guardian Gary no longer exist as no efforts were made to split segments by gender. Guardian Gary now is mostly found in the new Family Guardian and Prepared for the Worst segments.

Debbie Defense (15% of the 2000- 2015 market) - An all-female segment, Debbie Defense was interested in personal protection, at- and away-from-home. Young and more ethnically diverse, she enjoyed the outdoors. Debbie Defense wanted concealability and light weight in a firearm. Recreational shooting was of little interest.

Like Guardian Gary, the previous Debbie Defense segment no longer exists. She is now primarily found in the Prepared for the Worst segment with some also landing in the Family Guardian segment.

Four other segments were identified as having interest beyond just protection:

Collector (8% of the 2000- 2015 market) – While the Collector was not necessarily looking for rare or antique firearms, this mostly-male segment wanted to possess different types of firearms. Slightly older and wealthier than the other segments, they hunted and went target shooting, but were not avid participants. Price and versatility were not a concern.

The Collector no longer exist as a unique consumer segment, but largely has been absorbed by the Family Guardian and Hunter segments, both of whom have a desire for specialty firearms where versatility is not as important.

The Social Shooter (8% of the 2000- 2015 market) - Rural and suburban, the Social Shooter was interested in firearms to spend time with friends. Price was a concern and versatility was desired in a firearm.

This segment no longer exists. Most were absorbed by the new Hunter and Skills Builder segments.

Hunter (11% of 2000-2015 market) - the Hunter owned firearms for the purpose of hunting. One of the older and most rural segments, the Hunter was not concerned about concealability, but sought quality while remaining price sensitive.

This segment still exists and now comprises 18% of the U.S. firearms market. The growth is not necessarily based on an increasing number of hunters, but some of 2015's Social Shooter members are now part of the new Hunter segment as are some of the previous Collector members.

Skills Builder (12% of the 2000- 2015 market) - Suburban with modest incomes, the Skills Builder was not outdoorsy. Younger and with higher rates of female and minority participation, this segment did not own many firearms, but wanted to be proficient with the firearms they owned. Concealability and low weight reflect their interest in personal protection.

The Skills Builder continues in the latest segmentation effort, now representing 17% of the U.S. firearms market. This segment did not necessarily grow significantly. instead, many of the previous Social Shooters now fit within this segment. The Skills Builder remains the youngest of all segments.

Appendix: Detailed Results

The following tables present detailed results for each of the segments, or personas, along with the same statistics for the Average Owner for comparison purposes. Some of the notable differences are presented in bold face.

Demographic Information

TABLE 3. GENDER

	Average Owner	Family Guardian	Skills Builder	Hunter	Urban Defender	Prepared for the Worst
Male	61.4%	57.8%	66.2%	**72.4%**	57.4%	55.7%
Female	38.6%	42.2%	33.8%	27.6%	42.6%	**44.3%**
Total	N=1173	N=326	N=197	N=194	N=171	N=285

TABLE 4. AGE

	Average Owner	Family Guardian	Skills Builder	Hunter	Urban Defender	Prepared for the Worst
18 to 24	8.0%	7.3%	12.6%	8.4%	4.4%	7.3%
25 to 34	17.0%	15.2%	**21.7%**	13.0%	18.0%	18.4%
35 to 44	20.0%	15.9%	19.3%	27.1%	24.1%	17.2%
45 to 54	24.3%	30.4%	18.9%	21.9%	22.5%	23.6%
55 to 64	17.9%	18.7%	14.9%	17.0%	18.7%	**19.4%**
65 and older	12.9%	12.6%	12.6%	12.5%	12.3%	**14.1%**
Total	N=1173	N=326	N=197	N=194	N=171	N=285

TABLE 5. RACE/ETHNICITY

	Average Owner	Family Guardian	Skills Builder	Hunter	Urban Defender	Prepared for the Worst
African American	11.3%	8.0%	9.9%	8.6%	**15.3%**	**16.0%**
Asian	3.5%	4.6%	3.8%	4.3%	3.8%	**1.1%**
Latin American	16.5%	16.9%	17.5%	**21.2%**	18.2%	10.4%
Native American, American Indian, or Native Alaskan	0.9%	0.8%	0.9%	0.5%	1.4%	0.9%
Native Hawaiian or Pacific Islander	0.2%	0.4%	0.3%	0.0%	0.2%	0.2%
White/Caucasian	84.3%	85.8%	86.6%	87.6%	79.7%	81.1%
Other	1.1%	1.7%	1.2%	0.0%	0.6%	1.5%
Total	N=1173	N=326	N=197	N=194	N=171	N=285

TABLE 6. ARE YOU OF HISPANIC, LATINO OR SPANISH ORIGIN?

	Average Owner	Family Guardian	Skills Builder	Hunter	Urban Defender	Prepared for the Worst
Yes	16.5%	16.9%	17.5%	**21.2%**	18.2%	10.4%
No	83.5%	83.1%	82.5%	78.8%	81.8%	89.6%
Total	N=1173	N=326	N=197	N=194	N=171	N=285

TABLE 7. MARITAL STATUS

	Average Owner	Family Guardian	Skills Builder	Hunter	Urban Defender	Prepared for the Worst
Married	56.6%	**64.5%**	59.1%	47.3%	57.2%	52.0%
Single, divorced	14.3%	11.5%	13.2%	17.1%	13.6%	16.8%
Single, never married	25.8%	18.0%	25.3%	33.3%	27.7%	28.4%
Widowed / widower	3.4%	6.0%	2.5%	2.3%	1.5%	2.9%
Total	N=1173	N=326	N=197	N=194	N=171	N=285

TABLE 8. TYPE OF RESIDENCE

	Average Owner	Family Guardian	Skills Builder	Hunter	Urban Defender	Prepared for the Worst
Rural	26.5%	23.2%	27.3%	31.4%	26.5%	26.2%
Small town not connected to a large city	10.7%	11.0%	9.0%	13.2%	8.1%	11.3%
Suburban area surrounding a large city	41.8%	**49.2%**	38.8%	31.8%	39.3%	44.3%
Urban area / large city	20.8%	16.6%	24.3%	23.6%	26.1%	17.6%
Not sure	0.2%	0.0%	0.6%	0.1%	0.0%	0.6%
Total	N=1173	N=326	N=197	N=194	N=171	N=285

TABLE 9. HOUSEHOLD INCOME

	Average Owner	Family Guardian	Skills Builder	Hunter	Urban Defender	Prepared for the Worst
Less than $10,000	3.0%	2.6%	4.1%	3.0%	3.7%	2.1%
$10,000 to $24,999	9.5%	9.9%	7.0%	10.5%	**14.9%**	6.8%
$25,000 to $49,999	23.2%	21.8%	17.4%	19.4%	17.9%	35.7%
$50,000 to $74,999	21.9%	21.5%	**25.3%**	21.0%	19.2%	22.3%
$75,000 to $99,999	18.0%	15.5%	**24.4%**	19.7%	16.9%	15.9%
$100,000 to $149,999	16.3%	19.6%	13.8%	17.9%	17.7%	11.8%
$150,000 to $200,000	4.6%	5.9%	6.1%	2.8%	5.8%	2.5%
More than $200,000	3.5%	3.3%	1.9%	5.7%	3.9%	2.9%
Total	N=1173	N=326	N=197	N=194	N=171	N=285

TABLE 10. EMPLOYMENT STATUS

	Average Owner	Family Guardian	Skills Builder	Hunter	Urban Defender	Prepared for the Worst
Full time	53.4%	56.5%	56.9%	54.1%	50.6%	48.3%
Part time	8.9%	7.0%	13.0%	6.1%	11.2%	9.1%
Military	0.7%	0.7%	0.5%	1.4%	1.2%	0.1%
Student	2.3%	1.6%	3.6%	3.1%	0.6%	2.5%
Homemaker	8.0%	8.0%	6.9%	4.5%	8.7%	11.2%
Retired	17.8%	18.4%	14.1%	20.1%	17.6%	18.0%
Unemployed	6.7%	6.4%	3.7%	7.1%	7.6%	8.2%
Other	2.2%	1.4%	1.4%	3.6%	2.4%	2.6%
Total	N=1173	N=326	N=197	N=194	N=171	N=285

TABLE 11. PLEASE PICK UP TO THREE WORDS OR PHRASES THAT BEST DESCRIBE YOU:

	Average Owner	Family Guardian	Skills Builder	Hunter	Urban Defender	Prepared for the Worst
1st	Dependable	Dependable	Dependable	Dependable	Dependable	Dependable
2nd	Level-headed	Level-headed	Outdoors oriented	Outdoors oriented	Level-headed	Level-headed
3rd	Protective	Protective	Level-headed	Level-headed	Confident	Protective
Total	N=1173	N=326	N=197	N=194	N=171	N=285

Segment Descriptions

TABLE 12. AGE WHEN FIRST FIREARM WAS PURCHASED OR GIVEN TO THEM

	Average Owner	Family Guardian	Skills Builder	Hunter	Urban Defender	Prepared for the Worst
18-24	63.1%	58.8%	64.9%	**74.9%**	62.5%	58.0%
25-34	19.3%	19.9%	21.8%	18.5%	19.8%	17.0%
35-44	6.8%	9.1%	4.8%	3.2%	6.5%	8.6%
45-54	6.1%	9.1%	4.6%	1.4%	4.4%	8.5%
55-64	3.3%	1.9%	2.8%	1.7%	4.8%	5.6%
65+	1.4%	1.2%	1.2%	0.3%	1.9%	2.4%
Total	N=1173	N=326	N=197	N=194	N=171	N=285

TABLE 13. TYPE OF FIREARM MOST RECENTLY PURCHASED

	Average Owner	Family Guardian	Skills Builder	Hunter	Urban Defender	Prepared for the Worst
Semi-automatic handgun	48.2%	50.6%	38.9%	22.9%	**68.2%**	**57.8%**
Revolver	17.8%	22.0%	13.1%	14.1%	17.8%	18.6%
Shotgun	12.6%	13.1%	12.2%	21.6%	**4.2%**	9.6%
Traditional Rifle	11.1%	8.0%	16.9%	22.7%	3.2%	6.0%
Modern Sporting Rifle (AR/AK platform or style rifle)	9.8%	5.2%	**15.4%**	**16.5%**	5.9%	7.9%
Blackpowder or muzzleloader	0.6%	0.2%	1.5%	1.5%	0.0%	0.0%
Total	N=1173	N=326	N=197	N=194	N=171	N=285

TABLE 14. SEGMENTATION VARIABLES: PLEASE RANK THE REASONS FOR YOUR MOST RECENT FIREARM PURCHASE

	Average Owner	Family Guardian	Skills Builder	Hunter	Urban Defender	Prepared for the Worst
To provide safety / protection for myself and others *at home*	62.2%	67.5%	**46.4%**	**33.8%**	81.9%	78.0%
To provide safety / protection for myself and others *away from home*	43.4%	44.0%	**26.6%**	**22.7%**	**75.6%**	51.3%
To have fun	17.2%	14.4%	**27.8%**	**24.6%**	4.8%	14.7%
To acquire a firearm before sales are further restricted	21.3%	27.3%	**11.2%**	16.0%	30.6%	19.7%
To spend time/participate with my family and friends/peers, or to impress my friends	8.1%	5.7%	**12.8%**	**13.7%**	4.9%	5.0%
To develop shooting skills / become proficient	34.7%	**17.4%**	**54.2%**	26.3%	32.3%	**50.2%**
To hunt for meat	11.6%	8.0%	15.5%	**29.6%**	2.8%	4.2%
To hunt for recreation	10.3%	8.0%	15.7%	**21.4%**	2.5%	5.4%
To have the best/newest gear	5.2%	4.7%	9.0%	8.8%	3.3%	**1.4%**
To know this type of firearm better	10.9%	8.4%	**18.9%**	15.0%	6.8%	7.4%
I didn’t have this type of firearm before	12.0%	12.2%	13.2%	**19.7%**	7.4%	7.6%
To add to my firearm collection	24.2%	24.3%	27.3%	29.0%	16.0%	23.1%
Total	N=1173	N=326	N=197	N=194	N=171	N=285

TABLE 15. PLEASE RANK THE INTENDED PURPOSE OF YOUR MOST RECENT FIREARM PURCHASE

	Average Owner	Family Guardian	Skills Builder	Hunter	Urban Defender	Prepared for the Worst
Hunting	47.2%	38.6%	57.3%	**68.2%**	42.5%	36.3%
Target shooting	77.7%	66.6%	**92.2%**	77.6%	77.6%	81.1%
Home or self-protection	89.3%	93.3%	84.2%	75.8%	**98.5%**	**93.0%**
To own it, or add it to my collection	28.8%	27.5%	30.0%	30.6%	30.6%	26.8%
Other	65.1%	60.5%	74.0%	64.6%	64.9%	64.6%
Total	N=1173	N=326	N=197	N=194	N=171	N=285

TABLE 16. WHICH OF THE FOLLOWING CHOICES WERE YOUR TOP THREE REASONS FOR BUYING YOUR MOST RECENT FIREARM

	Average Owner	Family Guardian	Skills Builder	Hunter	Urban Defender	Prepared for the Worst
I feel unsafe in my home	17.5%	18.4%	6.4%	9.3%	**50.1%**	10.7%
I feel unsafe while away from my home	18.4%	0.0%	8.8%	1.7%	**100.0%**	10.0%
To be proficient with firearms / to develop shooting skills	**40.2%**	0.0%	100.0%	0.0%	6.3%	100.0%
To participate in a social activity	5.0%	5.5%	7.9%	8.8%	0.8%	1.8%
To have fun on my own	11.7%	7.8%	19.2%	25.2%	**3.3%**	**5.5%**
To provide my own meat for food	12.0%	7.7%	17.2%	31.1%	**3.5%**	**3.5%**
I've always wanted to own a firearm	10.8%	10.4%	14.4%	12.1%	6.5%	10.3%
To have an adventure	4.4%	4.1%	4.5%	**12.1%**	0.8%	0.8%
To participate in a challenging activity	8.0%	4.6%	**15.5%**	**19.4%**	3.0%	0.8%
To be a part of the firearm community	3.6%	2.3%	**8.1%**	**7.3%**	1.0%	0.4%
To participate in an activity that provides a sense of accomplishment	8.2%	4.1%	**13.0%**	**18.9%**	1.9%	5.0%
To teach others how to use firearms or hunt	7.3%	4.6%	**11.4%**	**11.3%**	6.3%	5.2%
To gain a sense of independence	8.9%	**14.8%**	6.5%	9.4%	5.0%	5.6%
To gain a sense of confidence	11.9%	**18.2%**	9.5%	9.2%	7.1%	11.0%
To participate in a relaxing activity	12.2%	9.8%	19.5%	**27.0%**	**1.7%**	**4.7%**
To feel empowered	9.9%	17.2%	**5.2%**	10.0%	9.0%	**4.9%**
To be a provider	5.8%	6.6%	7.5%	9.2%	3.1%	2.7%
To feel a sense of security	**61.1%**	100.0%	0.0%	0.0%	72.6%	100.0%
Other	4.6%	2.9%	4.3%	14.4%	1.2%	1.4%
Total	N=1173	N=326	N=197	N=194	N=171	N=285

TABLE 17. PLEASE RATE THE LEVEL OF IMPORTANCE OF EACH OF THE FOLLOWING PURCHASING CONSIDERATIONS WHEN YOU MADE YOUR MOST RECENT FIREARM PURCHASE (1 IS LEAST IMPORTANT, 5 IS MOST IMPORTANT).

Results show the distance from the mean, or average owner. Negative numbers mean the segment is less likely than average to rate that purchase consideration:

	Average Owner	Family Guardian	Skills Builder	Hunter	Urban Defender	Prepared for the Worst
High quality	4.5	0.4%	-1.1%	-0.7%	1.7%	0.0%
Reliable	4.6	0.3%	-1.5%	-2.1%	1.2%	1.9%
Lightweight or concealable	3.6	-0.5%	-2.6%	-12.4%	14.9%	4.2%
Recommended by friend/family or expert	3.2	-1.0%	0.1%	0.5%	-0.8%	1.2%
Innovative / new technology	3.3	-4.6%	3.0%	1.2%	3.8%	0.2%
Good value for the price	4.0	-1.1%	4.6%	1.1%	-4.0%	-0.8%
Versatile, can be used for multiple purchases	3.6	-5.2%	2.1%	4.0%	2.8%	-0.2%
Total	N=1173	N=326	N=197	N=194	N=171	N=285

Activity Participation Questions

TABLE 18. IN THE PAST 5 YEARS, HAVE YOU PARTICIPATED IN ANY OF THE FOLLOWING ACTIVITIES?

	Average Owner	Family Guardian	Skills Builder	Hunter	Urban Defender	Prepared for the Worst
Camping	61.3%	64.6%	61.5%	65.7%	58.5%	55.2%
Shooting	81.4%	76.2%	90.9%	77.9%	77.8%	86.3%
Bow Shooting	31.4%	26.1%	37.3%	40.3%	26.3%	30.0%
Water Skiing	15.0%	13.6%	19.4%	17.5%	12.6%	13.2%
Watching Superbowl	68.2%	70.4%	67.8%	64.7%	67.5%	69.1%
Fishing	66.5%	65.4%	65.3%	72.9%	67.4%	63.1%
Hunting	46.7%	43.9%	55.3%	63.6%	44.0%	31.8%
Bow Hunting	23.4%	19.8%	28.5%	37.1%	19.5%	15.3%
Backpacking	37.5%	35.6%	39.5%	44.8%	37.4%	32.7%
ATV-ing	40.1%	37.0%	38.1%	50.9%	43.3%	34.5%
Paintball	24.7%	25.2%	26.4%	29.4%	25.1%	18.7%
Biking	30.0%	28.2%	34.8%	37.0%	24.1%	27.0%
Bird watching	28.0%	25.6%	31.1%	26.7%	27.6%	30.0%
Skiing	14.1%	12.8%	13.5%	19.3%	11.6%	13.7%
Total	N=1173	N=326	N=197	N=194	N=171	N=285

TABLE 19. PLEASE CHECK THE TYPES OF TYPES OF FIREARM-RELATED ACTIVITIES YOU HAVE ENGAGED IN IN THE PAST YEAR:

	Average Owner	Family Guardian	Skills Builder	Hunter	Urban Defender	Prepared for the Worst
1st	Target shooting (paper or formal targets)	Target shooting (paper or formal targets)	Target shooting (paper or formal targets)	Target shooting (paper or formal targets)	Target shooting (paper or formal targets)	Target shooting (paper or formal targets)
2nd	Maintained a firearm for home protection	Maintained a firearm for home protection	Maintained a firearm for home protection	Hunting, deer and other big game	Maintained a firearm for home protection	Maintained a firearm for home protection
3rd	Maintained a firearm for self- and family protection away from home	Maintained a firearm for self- and family protection away from home	Hunting, deer and other big game	Maintained a firearm for home protection	Maintained a firearm for self- and family protection away from home	Maintained a firearm for self- and family protection away from home
Total	N=1173	N=326	N=197	N=194	N=171	N=285

TABLE 20. PLEASE CHECK THE STATEMENT THAT BEST DESCRIBES HOW FREQUENTLY YOU GO HUNTING WITH A FIREARM

	Average Owner	Family Guardian	Skills Builder	Hunter	Urban Defender	Prepared for the Worst
I have never been hunting	32.1%	38.1%	29.9%	15.2%	32.9%	39.5%
Just once in my life	8.9%	6.4%	10.4%	6.0%	9.1%	13.3%
Maybe once every five years or more	5.3%	5.8%	5.4%	4.9%	1.9%	7.2%
Once every year to five years	5.5%	7.3%	2.7%	6.8%	4.6%	5.1%
Once a year, typically	10.6%	9.7%	10.1%	12.8%	16.3%	6.8%
Two to six times a year	17.9%	19.0%	19.1%	22.8%	14.6%	13.8%
Approximately once a month during my preferred season(s)	5.1%	4.1%	4.4%	6.2%	3.7%	6.9%
More than once a month during my preferred season(s)	7.5%	3.8%	12.9%	12.9%	9.5%	2.5%
Not sure	1.3%	0.5%	0.4%	1.5%	2.3%	2.0%
Total	N=1173	N=326	N=197	N=194	N=171	N=285

TABLE 21. PLEASE CHECK THE STATEMENT THAT BEST DESCRIBES HOW FREQUENTLY YOU GO TARGET SHOOTING, WHETHER IT'S WITH A RIFLE, HANDGUN, OR SHOTGUN.

	Average Owner	Family Guardian	Skills Builder	Hunter	Urban Defender	Prepared for the Worst
I have never been target shooting	3.1%	5.8%	1.0%	1.1%	4.0%	2.1%
Just once in my life	3.8%	4.3%	1.8%	1.7%	7.4%	4.3%
Maybe once every five years or more	4.5%	8.5%	2.5%	4.5%	3.4%	1.7%
Once every year to five years	4.7%	5.6%	2.8%	4.6%	4.4%	5.5%
Once a year, typically	11.8%	13.1%	6.1%	15.4%	9.3%	13.0%
Two to six times a year	32.4%	29.6%	41.6%	25.6%	25.4%	39.0%
Approximately once a month	22.9%	20.6%	26.6%	25.0%	22.8%	21.3%
More than once a month	12.3%	10.7%	12.1%	14.3%	17.1%	9.6%
Once a week or more	3.8%	1.6%	4.9%	7.4%	5.4%	1.8%
Not sure	0.8%	0.3%	0.6%	0.4%	0.9%	1.7%
Total	N=1173	N=326	N=197	N=194	N=171	N=285

TABLE 22. PLEASE SELECT UP TO THREE WORDS OR PHRASES THAT BEST DESCRIBE THE SATISFACTIONS RECEIVED FROM TARGET SHOOTING WITH A FIREARM (OF THOSE WHO HAVE BEEN TARGET SHOOTING)

	Average Owner	Family Guardian	Skills Builder	Hunter	Urban Defender	Prepared for the Worst
Empowering	10.5%	13.5%	10.1%	**4.8%**	7.5%	13.7%
Fun / adventure	33.0%	34.5%	33.7%	35.0%	27.8%	32.0%
Social / family / friends	17.7%	16.8%	**24.3%**	19.2%	15.1%	13.8%
Work / job improvement	2.2%	2.0%	2.6%	3.3%	3.3%	0.4%
Tradition	7.1%	6.2%	7.8%	10.5%	6.1%	5.4%
Exercise	5.6%	7.7%	2.0%	6.3%	5.9%	4.9%
Exciting, thrilling	22.8%	25.2%	28.9%	21.6%	17.0%	19.7%
Challenging	29.5%	28.5%	31.8%	30.2%	32.9%	26.3%
Independence	6.8%	6.2%	5.1%	6.8%	8.8%	7.6%
Achievement	17.5%	18.3%	15.0%	15.4%	20.3%	18.6%
Developing skills / mastery	59.2%	51.7%	61.8%	51.0%	60.3%	72.5%
Mentoring	2.2%	1.2%	3.8%	2.4%	3.8%	0.8%
Relaxing	22.0%	21.0%	24.2%	31.4%	15.8%	17.3%
Contemplative	2.4%	1.3%	6.2%	3.1%	**0.4%**	1.6%
An escape	11.8%	14.4%	10.4%	10.6%	13.8%	9.7%
Confidence building	32.1%	30.4%	24.3%	21.5%	39.4%	**44.6%**
Other	0.5%	0.9%	0.0%	0.4%	0.5%	0.4%
Total	N=1076	N=290	N=190	N=184	N=147	N=265

TABLE 23. PLEASE SELECT UP TO THREE WORDS OR PHRASES THAT BEST DESCRIBE THE SATISFACTIONS RECEIVED FROM HUNTING WITH A FIREARM (OF THOSE WHO HAVE HUNTED)

	Average Owner	Family Guardian	Skills Builder	Hunter	Urban Defender	Prepared for the Worst
Conservation	10.1%	9.4%	13.9%	10.2%	8.3%	8.8%
Self-sufficient / a provider	31.4%	32.6%	32.7%	23.9%	37.9%	33.4%
Empowering	5.8%	6.2%	6.2%	9.8%	3.3%	1.3%
Fun / adventure	33.0%	29.2%	37.4%	34.6%	34.0%	31.7%
Social/family/friends	17.8%	16.3%	15.8%	21.2%	19.9%	15.8%
Tradition	25.0%	21.3%	29.4%	24.7%	28.1%	24.2%
Exercise	7.3%	3.4%	10.7%	11.6%	7.4%	4.0%
Exciting, thrilling	29.5%	34.8%	26.0%	27.2%	27.2%	30.1%
Dangerous	1.5%	1.2%	1.6%	2.5%	0.0%	1.7%
Trophies	2.9%	2.3%	5.9%	1.2%	6.6%	0.6%
Achievement	13.1%	12.2%	14.1%	11.8%	12.4%	15.9%
Developing skills/mastery	25.7%	20.6%	28.5%	23.5%	25.1%	34.1%
Challenging	28.2%	28.1%	25.8%	25.7%	31.8%	31.0%
Independence	9.4%	9.6%	9.3%	7.9%	9.4%	11.4%
Relaxing	16.2%	18.0%	10.9%	17.4%	15.6%	17.1%
Contemplative	1.1%	0.9%	1.1%	2.0%	1.0%	0.0%
An escape	15.7%	19.8%	7.2%	17.1%	16.6%	15.3%
Confidence building	8.0%	11.3%	7.5%	9.8%	3.0%	4.7%
Other	1.0%	1.1%	1.3%	1.0%	1.8%	0.1%
Total	N=649	N=173	N=115	N=148	N=86	N=127

Protection Questions

TABLE 24. ON A SCALE OF 1 TO 5, PLEASE RATE THE FOLLOWING REASONS WHY YOU CHOOSE TO OWN A FIREARM FOR PROTECTION PURPOSES: (1 IS NOT IMPORTANT, 5 IS EXTREMELY IMPORTANT)

	Average Owner	Family Guardian	Skills Builder	Hunter	Urban Defender	Prepared for the Worst
1st	I want to rely on myself for protection, not others	I want to rely on myself for protection, not others	I want to rely on myself for protection, not others	I want to rely on myself for protection, not others	I want to rely on myself for protection, not others	I want to rely on myself for protection, not others
2nd	I want to always be in control	I want to always be in control	Police and other security services are too far to be fully effective	I want to always be in control	I do not trust others around me	I want to always be in control
3rd	Police and other security services are too far to be fully effective	Police and other security services are too far to be fully effective	I want to always be in control	Police and other security services are too far to be fully effective	Police and other security services are too far to be fully effective	Police and other security services are too far to be fully effective
Total	N=885	N=262	N=117	N=102	N=161	N=243

TABLE 25. PLEASE SELECT UP TO THREE WORDS OR PHRASES THAT BEST DESCRIBE WHY YOU WOULD MAINTAIN A FIREARM FOR PERSONAL AND/OR HOME PROTECTION

	Average Owner	Family Guardian	Skills Builder	Hunter	Urban Defender	Prepared for the Worst
Self-sufficient	24.2%	22.6%	24.0%	23.0%	28.9%	24.5%
Fast response	19.3%	16.8%	22.8%	17.5%	23.2%	18.8%
Protect myself / my family	71.8%	79.0%	55.2%	**45.3%**	89.0%	85.5%
Protect my property	**50.3%**	56.4%	34.1%	34.9%	**64.4%**	**58.1%**
Empowering	4.2%	5.0%	2.1%	6.2%	5.3%	2.8%
Confidence	5.6%	6.9%	6.7%	5.5%	4.6%	3.8%
Security	50.4%	59.1%	33.8%	30.5%	64.4%	59.3%
Other	0.3%	0.0%	0.4%	0.9%	0.7%	0.0%
Total	N=926	N=279	N=122	N=113	N=164	N=248

Overall Demographics

TABLE 26. WEIGHTING DEMOGRAPHICS

		All Entrants	Weighted Entrants	Firearm Owners
Age	18-24	10.2%	15.0%	8.0%
	25-34	18.0%	17.0%	17.0%
	35-44	20.1%	17.0%	20.0%
	45-54	14.1%	18.1%	24.3%
	55-64	16.2%	17.0%	17.9%
	65+	21.5%	16.0%	12.9%
Gender	Male	39.6%	49.0%	61.4%
	Female	60.4%	51.0%	38.6%
Race	White	79.4%	75.0%	84.3%
	African American	12.5%	15.5%	11.3%
	Asian	4.9%	8.5%	3.5%
	Other	6.3%	2.3%	2.1%
Household Income	Less than $25,000	23.1%	25.0%	12.5%
	$25,000 to $49,999	24.5%	24.0%	23.2%
	$50,000 to $74,999	19.2%	18.1%	21.9%
	$75,000 to $99,999	14.0%	11.9%	18.0%
	$100,000 or more	19.3%	21.0%	24.3%
Region	Northeast	19.8%	16.9%	11.0%
	Midwest	21.6%	21.0%	23.4%
	South	39.2%	38.1%	44.5%
	West	19.3%	24.0%	21.1%
	TOTAL SAMPLE SIZES	**N=11,269**	**N=11,269**	**N=1,173**