First Time Firearms Buyers Segmentation

Produced by Southwick Associates, Inc.

One size does not fit all. First time buyers are not all the same.

Increasing the number of firearm consumers depends on knowing the various types of people interested in our products and services. Once a company or agency fully understands potential new customers' interests, desires and preferences, it is possible to:

- Refine communication and advertising initiatives;
- Improve new product development efforts while better defining their product mix; and
- Merchandise products at retail for easier shopping and faster decision making.

A consumer segmentation analysis identifies the uniquely distinct parts, or segments, of the market. In a needs-based segmentation, each segment shares 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 potentially buy a firearm, and the reasons why they favor specific firearms, companies can improve their products, marketing and customer interactions. For example, some consumers want premium quality and unquestionable precision – price is no object. Other consumers desire everyday functionality and acceptable workmanship all at a good value.

This summary represents the tip of an information iceberg. This work is based on an extensive survey of the general U.S. population conducted by Southwick Associates for the National Shooting Sports Foundation (NSSF), to identify people who currently do not own a firearm but are "very likely" to purchase a firearm within the next five years. Overall, there are 24.4 million Americans who fit this profile, representing significant growth potential for firearms sales. Read further to meet the eight distinct customer segments who have yet to purchase a firearm, but have the potential to grow the industry.

An additional needs-based market segmentation study is available for current firearms owners. Contact Nancy Bacon of Southwick Associates at Nancy@SouthwickAssociates.com to learn more about all the NSSF consumer segmentation resources available to you, including custom inquiries matched to your products, niches and needs.

The Aspiring Hunter

9% of U.S. public "very likely" to buy within the next five years

The Aspiring Hunter is a younger segment who is most likely to describe themselves as outdoors-oriented and old-fashioned. The Aspiring Hunter most likely has gone hunting sometime in their lifetime, but does not participate in the sport on a regular basis. A third of the Aspiring Hunter segment has never been hunting at all. Only 13 percent hunt regularly. Aspiring Hunters frequently participate in other outdoor-related activities including fishing, camping, riding all-terrain vehicles, and mountain-biking.

Members of this segment are interested in the opportunity to provide their own meat for food. Aspiring Hunters who have hunted find the sport exciting and thrilling, and enjoy the self-sufficiency that comes along with providing wild game.

Target shooting is also of interest to the Aspiring Hunter who enjoys developing their firearm skills along with the fun and adventure associated with recreational shooting. Twenty-one percent shoot regularly.

The Aspiring Hunter is not concerned about concealability, and will be more likely to purchase a long gun such as a traditional rifle than any other segment. While being price conscious, these potential buyers desire their firearm to have specialized features.

The Aspiring Hunter segment is the least ethnically diverse, has a low percentage of female representation, and is the most likely to have children in their household. The members of this segment are divided nearly equal into rural, suburban, and urban areas.

If asked, an Aspiring Hunter might tell you: "I'm ready to take my passion for the outdoors to the next level and buy my own firearm to go hunting."

Key opportunity: As the most outdoor-oriented, the Aspiring Hunter is seeking a firearm to pursue the sport they currently or intend to enjoy. The Aspiring Hunter can be reached best by marketing price conscious firearms with features that are specialized towards individual types of wild game. Assisting in locating places to hunt will be appreciated and will help ensure future sales to these new hunters, as will assistance with hunter education. Hunting accessories are certainly in demand.

Female	40%
Minorities	24%

Average Age	37
Intend to purchase a handgun in the future	37%
Married	35%

Fun Fanatic

11% of U.S. public "very likely" to buy within the next five years

Typically located in suburban areas, the Fun Fanatic is interested in purchasing a firearm to have fun with family and friends or on their own. The Fun Fanatic target shoots regularly often with friends (29%), but is now considering buying their own firearm. The appeal of target shooting is adventure and social time with friends and others.

The Fun Fanatic is not outdoorsy, and hunting is of little interest. Only five percent hunt regularly. However, those few who do participate in hunting do so for the same adventure and social aspects sought while target shooting.

Concerning the type of firearm most likely to be purchased in the future, the Fun Fanatic segment is the segment most likely to purchase a modern sporting rifle.

A quarter of the Fun Fanatic segment have grown up always wanting to own a firearm; however, this segment is not concerned about purchasing a firearm before sales are further restricted.

When deliberating a potential firearm purchase, the Fun Fanatic places value on firearms that have been recommended or used by professionals. This segment is the least price conscious, and does not desire specialized features. For members of this segment, when considering purchasing a firearm, their attention is on fun and not on the price tag.

If asked, a Fun Fanatic might tell you: "My focus is on fun when I consider making a firearm purchase."

Key opportunity: The least price conscious segment, the Fun Fanatic makes their firearm purchase in the pursuit of fun. Emphasize using firearms as a fun way to spend time with family and friends to more effectively target this segment. Accessories that can enhance the fun element will sell well to this segment.

Female	48%
Minorities	33%

Average Age	38
Intend to purchase a handgun in the future	52%
Married	42%

Learner

14% of U.S. public "very likely" to buy within the next five years

Above all, the Learner desires to personally engage with firearms. Owning a firearm would give the Learner the hands-on experience that they seek. Their motivations for purchasing a firearm lie in their aspiration to better understand firearms, and to know specific types of firearms better. The Learner also has the goal to become more proficient with firearms, and to develop shooting skills.

Though not highly interested in hunting (0% hunt on a regular basis), members of the Learner segment who have hunted are divided between the relaxing versus the exciting/thrilling sides of the sport. Target shooting is also of little interest to the Learner segment (11% shoot regularly); however, most members enjoy developing shooting skills and the confidence boost they receive from target shooting.

Learners are most likely to describe themselves as trusting, individual, and well-rounded. They are also the segment most likely to purchase a handgun versus a long gun in the next five years.

The Learner is primarily interested in high quality, reliable firearms. They have a low level of interest in firearms recommended or used by professionals but favor firearms with a good brand reputation. Not particularly price conscious, the Learner does not place much importance on concealability or specialized features.

The Learner is the segment with the highest portion of African-American participation, and the segment least likely to have children in their house.

If asked, a Learner might tell you, "I'm interested in buying a firearm out of curiosity, to learn more about them and become proficient in their use."

Key opportunity: Determined to purchase a firearm for the hands-on experience they desire, the Learner is interested in having the latest and greatest gear. Marketing firearms manufactured by respectable brands known for their high quality will have a great impact on the Learner. Lessons, cases, safety gear are all natural for add-on sales.

Female	43%
Minorities	41%

Average Age	42
Intend to purchase a handgun in the future	70%
Married	38%

Anxious Buyer

22% of U.S. public "very likely" to buy within the next five years

The largest segment, the Anxious Buyer is primarily concerned with one thing - purchasing a firearm before sales are further restricted. Most of the Anxious Buyer segment have grown up always wanting to own a firearm, and their suspicion that they will not be able to fulfill this desire encourages them to buy sooner rather than later.

Concerned mainly with owning a firearm for protection, the Anxious Buyer has little interest in hunting and target shooting. Only one percent hunt regularly, and 13 percent shoot regularly. Those few who have participated in these activities find that the challenging characteristics of both sports gives them the most satisfaction. Almost a third of Anxious Buyers enjoy the tradition that comes along with hunting, and the fun and adventure that accompanies target shooting.

Though they are one of the oldest segments, Anxious Buyers consider themselves tech savvy and are not outdoorsy. Most Anxious Buyers are female.

Anxious Buyers seek firearms known for their quality and reliability. The value they place on concealability and low weight reflects their desire for personal protection. Slightly price conscious, Anxious Buyers are not interested in specialized features or firearms which have been recommended or used by professionals.

If asked, an Anxious Buyer might tell you, "I want to buy a firearm before it's too late."

Key opportunity: Since purchasing a firearm is the childhood dream of many Anxious Buyers, drawing attention to the concern that firearm sales could be further restricted will have a great impact on Anxious Buyers. But these potential new owners will seek quality, reliability, and low cost before deciding to make these dreams a reality. Firearms such as MSRs that are more frequently targeted for sales restrictions are best bets.

Female	54%
Minorities	29%

Average Age	44
Intend to purchase a handgun in the future	59%
Married	43%

Aspiring Target Shooter

15% of U.S. public "very likely" to buy within the next five years

As the name suggests, the Aspiring Target Shooter is considering purchasing a firearm to go recreational shooting. The Aspiring Target Shooter is also interested in firearms as a way to become more proficient with them, and to develop skills.

A quarter of this segment target shoot regularly. However, over a third of this segment has only been target shooting once in their lifetime or has never been shooting at all. These members desire to make their first firearm purchase and begin participating in this sport. When recreational shooting, this segment enjoys having fun with friends and family.

Many members of this segment have received a firearm as a gift. In the past year, the Aspiring Target Shooter spent more than the members of the other segments on firearm-related items, range fees, and lessons overall when using this gifted firearm. This reflects their present interest in target shooting. Their intention to purchase their first firearm shows their willingness to further commit to the sport.

The Aspiring Target Shooter segment is the segment most likely to purchase a revolver in the next five years (26%), and have a moderate interest in purchasing a shotgun (9%). They are not likely to buy a rifle, either traditional or MSR. They are the most likely to be married, and to describe themselves as spontaneous.

The Aspiring Target Shooter is interested in a versatile firearm at a low price; however, they do not want to sacrifice quality and reliability when making their future purchase. Members of this segment are least concerned with concealability. They also display a slight preference for firearms that have been recommended or used by professionals.

If asked, an Aspiring Target Shooter might tell you, "I want my own firearm to go recreational shooting."

Key opportunity: The Aspiring Target Shooter will likely be most affected by marketing campaigns featuring new shooters participating in target shooting, allowing them to envision themselves going shooting. However, they require a price conscious firearm with high quality before making a purchase. Range memberships along with accessories that help make a range day more enjoyable are great add-on sales.

Female	39%
Minorities	37%

Average Age	39
Intend to purchase a handgun in the future	57%
Married	50%

Unprepared Protector

10% of U.S. public "very likely" to buy within the next five years

The Unprepared Protector, the least urban segment, intends to purchase a firearm to defend their household. Currently, members of this segment are unprepared to defend their home via firearms and they desire to change that. Personal protection away-from-home is not a concern. The Unprepared Protector is concentrated only on keeping the home front safe. Members of this segment put low priority on the fun or social aspects of owning a firearm; safety is their main concern. They also strive to develop proficiency in their firearm abilities.

A quarter of this segment have grown up always wanting to own a firearm. This childhood aspiration is reflected where a significant portion of this protection-oriented segment desires to acquire a firearm now before sales are furthered restricted, a concern shared by all of the protection segments.

Considering themselves the most tech savvy segment, the Unprepared Protector is not an avid hunter. However, a small percent hunt regularly (3%), and members of this segment enjoy its relaxing, challenging and social components. Unprepared Protectors are more interested in target shooting. Most have little experience with the sport, and only 18 percent shoot regularly. They receive the most satisfaction from developing mastery of the firearm, and the challenge and adventure of the sport.

Equally represented by males and females, the Unprepared Protector is most interested in purchasing a firearm known for its quality and reliability. Slightly price conscious, this segment does not place any value on specialized features, or firearms that have been recommended or used by professionals. Concealability is not a concern, perhaps reflecting their intent to intimidate potential home intruders.

The Unprepared Protector might tell you, "I need a firearm to keep my home and family safe."

Key opportunity: Members of the Unprepared Protector segment desire to purchase a firearm to provide security for themselves and their families. When talking with them, underline the ability of a firearm to keep the home front safe. Also, drawing attention to the concern that firearm sales could be further restricted will have an impact on this segment. Offer lessons, and accessories associated with home protection to boost sales.

Female	50%
Minorities	31%

Average Age	41
Intend to purchase a handgun in the future	61%
Married	49%

Unarmed Aaron

11% of U.S. public "very likely" to buy within the next five years

Unarmed Aaron is another distinctly different protection-oriented segment. With a slightly above average income, this mostly male segment desires to make a firearm purchase to protect himself while at and away-from-home.

Personal protection away-from-home is a greater concern than keeping the home front safe. Unarmed Aaron seeks to be proficient with firearms, and desires to attain one before the sales of firearms are further restricted. He does not purchase firearms for the motive of having fun, but uses firearms as a tool to ensure his personal safety away-from-home.

Not particularly outdoorsy, Unarmed Aaron describes himself as analytical, dependable, and protective. While not avid hunters, a few do hunt regularly (3%) and see hunting as a way to experience adventure, relaxation, and a challenge. More interested in target shooting regularly (16%), they see target shooting as adventurous, like the confidence boost received after shooting, and are interested in developing their shooting skills.

When Unarmed Aaron contemplates a future firearm purchase, he is most interested in firearms that have been recommended to him or used by professionals. Specialized features are also qualities that he looks for in a firearm. Concealability is of low interest.

Compared to other segments, Unarmed Aaron has greater minority representation, and the members of the Unarmed Aaron segment are most likely to be married. Unarmed Aaron is one of the oldest segments.

If asked, Unarmed Aaron might say, "I want to protect myself out in the real world."

Key opportunity: Mainly concerned with protecting himself away-from-home, incorporate expert and professional opinion in your marketing. Focus on the ability of a firearm to provide security away-from-home to entice this segment. Drawing attention to the concern that firearm sales could be further restricted will also have an impact on Unarmed Aaron.

Female	12%
Minorities	38%

Average Age	44
Intend to purchase a handgun in the future	69%
Married	51%

Weaponless Wendy

8% of U.S. public "very likely" to buy within the next five years

An all-female segment, Weaponless Wendy is looking to purchase a firearm in to provide herself with personal protection at and away-from home. She shares the same desire as the other protection-based segments to own a firearm before sales are further restricted.

Weaponless Wendy is currently not regularly involved in recreational shooting and hunting. However, a small percent hunt regularly (3%), and enjoy the challenge, excitement, and sense of achievement from their efforts. More target shoot regularly (16%), and receive the most satisfaction from developing skills, spending time with family and friends, and the confidence boost.

Protection is her upmost priority, as she is in one of the segments most likely to live in an urban setting. Considering her future purchase, she is one of the segments most interested in pursuing hunting. She is more interested in pursuing hunting with her future purchase than recreational shooting.

Members of this segment describes themselves as protective and level-headed. Most of these women are single, and over a third of these women have children living in their household indicating that there is a frequent amount of single mothers in this segment.

Weaponless Wendy is most likely to buy a handgun in the future, and is the least interested of all segments in long guns. She is looking for concealability and low weight when she makes a firearm purchase. Seeking a price conscious firearm with high quality and reliability, she does not place value on firearms that have been recommended or used by professionals.

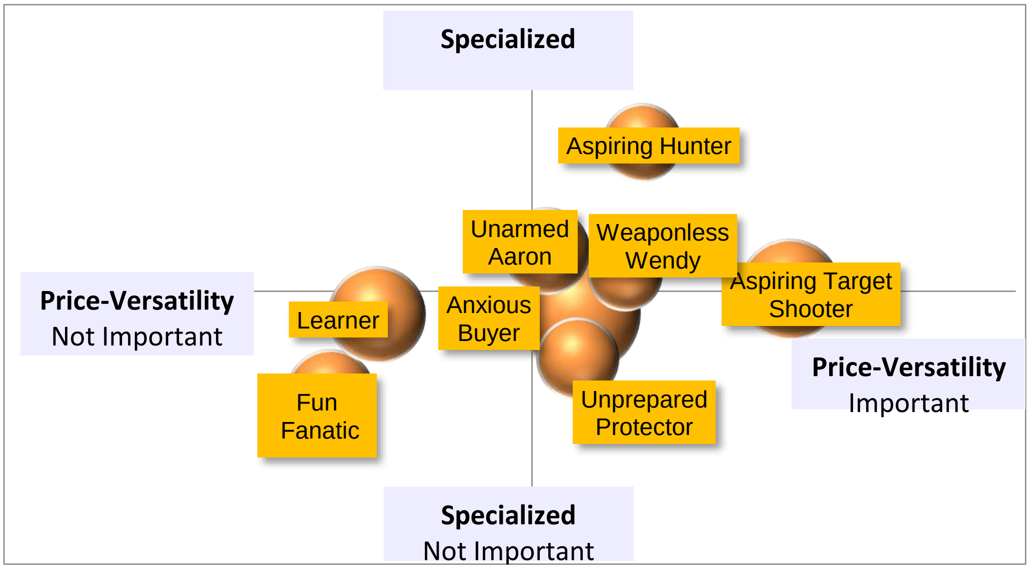
If asked, Weaponless Wendy might say, "Personal protection is my main concern. I want a firearm that's as easy to conceal as it is to handle."

Key opportunity: Mainly single, Weaponless Wendy desires a firearm to provide herself with personal protection while out or at home. Should a dangerous situation arise, she wants to be prepared by carrying a reliable handgun that handles easily. Drawing attention to the concern that firearm sales could be further restricted will also have an impact on Weaponless Wendy.

Female	100%
Minorities	35%

Average Age	39
Intend to purchase a handgun in the future	65%
Married	29%

The Playing Field



Needs-based consumer segmentation studies reveal the 'playing field', mapping each consumer segment based on their critical needs. The playing field above (presenting potential U.S. firearms consumers who are "very likely" to purchase a firearm in the next five years) shows how big each segment is relative to each other, and which ones are more value sensitive (Aspiring Hunter, Aspiring Target Shooter, Weaponless Wendy, etc.), and which ones enter the market knowing the specific features they want in a firearm (Aspiring Hunter and Unarmed Aaron).

This segmentation study of potential new firearm consumers is based on their intentions associated with their upcoming, first-ever firearm purchase, including individuals who may have been given a firearm in the past, but have to purchase one on their own. After their initial purchase, these individuals are no longer part of 'potential firearm consumers' market, but become actual firearm consumers (see NSSF's Firearms Consumer Segmentation study). Their needs and motivations will vary from purchase to purchase.

Consumer segmentation studies are best interpreted as describing the overall mix of consumers' motivations and needs as they exist today, and not as a permanent classification for any individual consumer. Consumer segmentation studies bring clarity to a complex market, and provide a starting point for you to further explore new business opportunities, improve marketing efforts, develop a tighter long-term bond with consumers and increase their lifetime value as your customer.

About Southwick Associates

Southwick Associates is a market research and economics firm, specializing in the hunting, shooting, sportfishing, and outdoor recreation markets. For more than 25 years, Southwick Associates has established a proven reputation for delivering comprehensive insights and statistics assisting business and strategic decisions across the entire outdoor industry; from government agencies, industry associations and non-profit organizations, to affiliated businesses and manufacturers. Aside from custom market research, Southwick Associates also provides syndicated participation, media consumption and equipment purchase tracking studies utilizing their proprietary sportsmen panels.

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About NSSF

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.

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