



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.

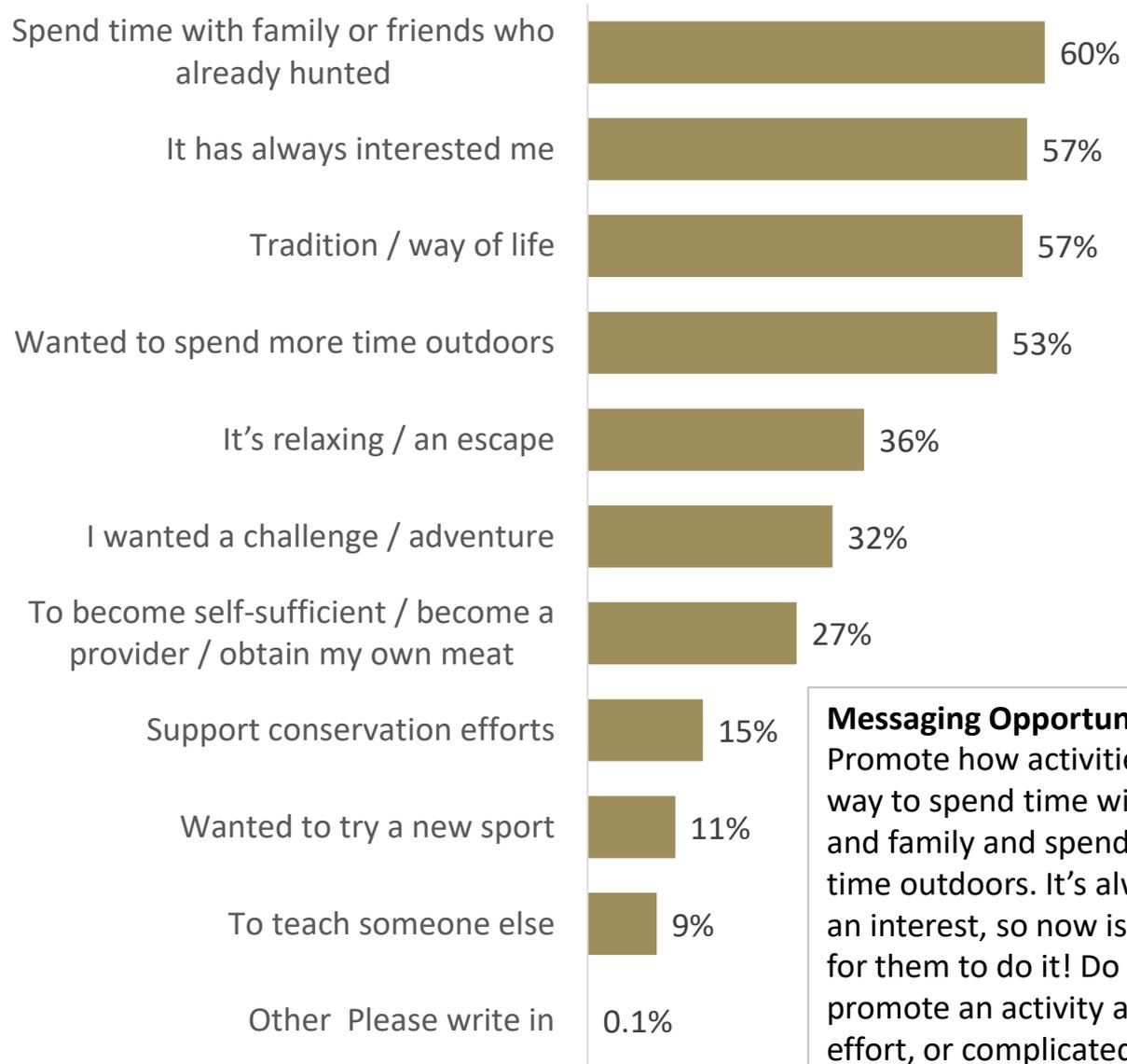
Introduction

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)





Traditional Centerfire Rifle Target Shooting

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

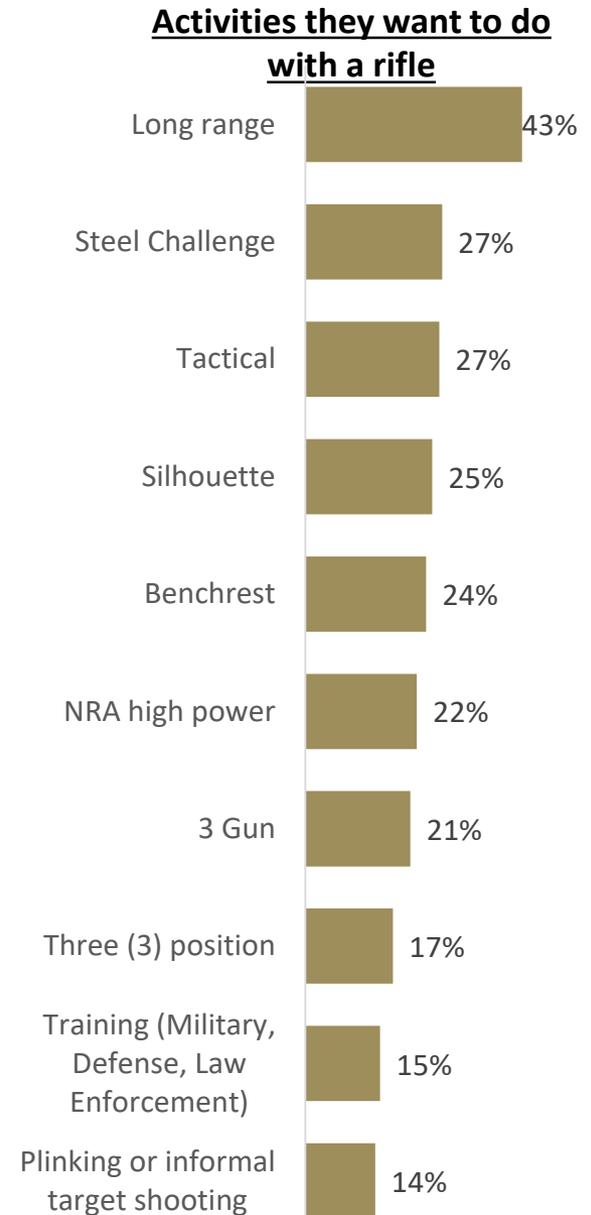
OVERVIEW – Moving People Into Traditional Centerfire Rifle

In general, hunters that are interested in trying target shooting with a traditional centerfire rifle are very experienced in using rifles. 36% of these hunters used a rifle to hunt for the first time and 89% of them have hunted with a traditional rifle in the past three years.

Many shooters want to return to the sport. Although only five percent started with a traditional centerfire rifle, 52% of those that went plinking used one in the past three years.

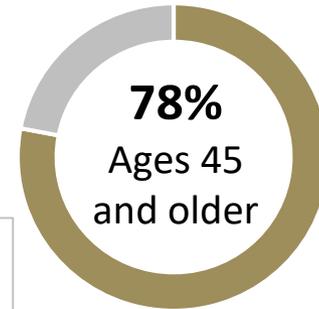
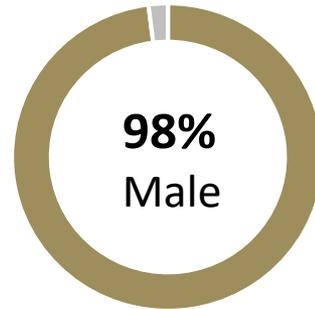
Not having access to a shooting range or access to a traditional centerfire rifle and not having enough time appears to be common problems for those who want to try or return to the sport. Not having anyone to go with and not knowing how to get started are also issues for some. Creating group shooting events and offering rental opportunities may inspire them to get to the range to shoot one.

Hunters and shooters say that receiving an invitation from a friend or joining a local shooting range would motivate them the most to try or get back into target shooting with a traditional centerfire rifle. Local ranges have an opportunity to generate more awareness via television, magazines and newsletters. In addition, programs hosted by state agencies and outdoor retailers can also inspire them to engage in the sport.



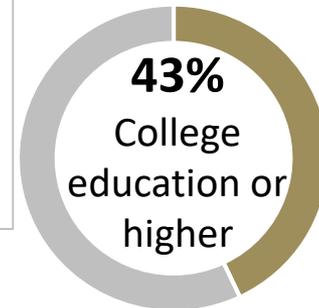
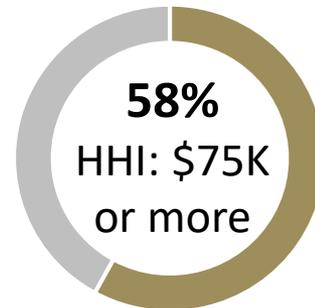
N=3,174

Key Demographics

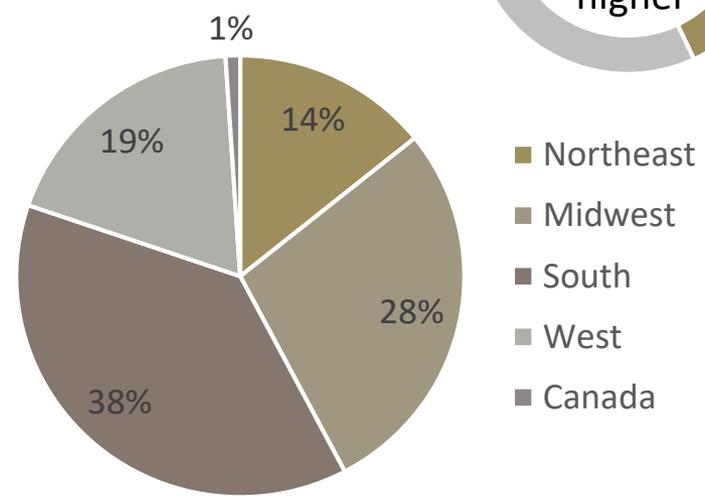


Of current hunters & target shooters who do not shoot traditional centerfire rifle but want to, most are male, middle-aged, affluent and/or educated. They are more likely to live in the Midwest and in the South.

Avg. Age: 55



Region



Q: What is your gender? (N=3,512); What is your age? (N=3,506); What is your household income? (N=3,484); What is your education level? (N=3,511). Where do you live? (N= 3,508).

MOVING HUNTERS INTO TRADITIONAL CENTERFIRE RIFLE



What Do They Currently Hunt? (THOSE WHO WANT TO TRY / RETURN TO TRADITIONAL CENTERFIRE RIFLE)



87%

Deer



58%

Turkey



53%

Small Game



51%

Upland Game



43%

Predators



33%

Waterfowl



23%

Wild Hog



19%

Elk



17%

Bear



10%

Other Big Game



36% of these hunters used a traditional rifle (centerfire or rimfire) to hunt for the first time and 89% of them are currently hunting with a traditional rifle (centerfire or rimfire). Two thirds say their father introduced them and 52% of them went small game hunting. Only five percent haven't tried hunting other species. For those that did, it took between two to five years for 41% of them and only one season for 26% of them.

MOVING TARGET SHOOTERS TO TRADITIONAL CENTERFIRE RIFLE



What Types of Shooting They Currently Do? (THOSE WHO WANT TO TRY / RETURN TO TRADITIONAL CENTERFIRE RIFLE)

Plinking / Informal Target Shooting 88%

Sighting-in 73%

Sporting Clays with a Shotgun 37%

Pattern Shotgun 34%

Trap with a Shotgun 31%

Skeet with a Shotgun 31%

Teaching / Informative 31%

Long Range with a Traditional
Centerfire Rifle 30%

Benchrest with a traditional
centerfire rifle 28%

Load Testing 27%

Target Shooting w/ Traditional
or Compound Bow 27%



Two-thirds (63%) of shooters say their father introduced them to the sport and only 12% were introduced by a friend. They are diverse as 80% started with plinking and then within two to five years, 32% of shooters tried a new activity and 25% branched out within a year. Many of them want to get back into shooting a traditional centerfire rifle. Although only five percent started with a traditional centerfire rifle, 52% of them went plinking with a traditional centerfire rifle in the past three years.

PATHS TO TRADITIONAL CENTERFIRE RIFLE



REASONS WHY THEY HAVEN'T TRIED SHOOTING A TRADITIONAL CENTERFIRE RIFLE



32% say
“there is not
enough time.”

No time



34% say “they
don’t own or have
access to
equipment.”

**No access to
a rifle**



15%
reported “too
expensive.”

Too expensive



20% say “they
don’t have
anyone to go
with.”

**No one to go
with**

Not having enough time or access to a shotgun are preventing hunters and target shooters from shooting one at the range. Not having anywhere to go and not having anyone to go with is also an issue for some. Offering rentals and promoting the convenience and the value of spending time outdoors may inspire them to try the sport. Encouraging them to plan in advance would be helpful, too, before other time commitments are made.

REASONS WHY THEY HAVEN'T RETURNED TO SHOOTING A TRADITIONAL CENTERFIRE RIFLE



45% say
“there is not
enough time.”

No time



32% say “these
activities are not
offered at ranges in
my area.”

Not available



21% say “they
don’t know
how to start.”

**Don’t know
how**



19% reported
“they don’t
have anyone to
go with.”

**No one to go
with**

Not having enough time and finding a shooting range that offers the activities (long range, steel challenge) that they want to use a traditional centerfire rifle with are preventing a significant amount of hunters and shooters from returning to the sport. Not knowing how to get started and not having anyone to go shooting with are challenges as well. Providing more close-to-home group events and educating them on how they can return to the sport may motivate them.

HOW TO HELP THEM TRY / RETURN TO TRADITIONAL CENTERFIRE RIFLE



43%

“Join a local range”



31%

“An invitation from a friend / family member”



26%

“Program offered by an outdoor retailer”



25%

“Books / Magazines”



26%

“Program offered by a state wildlife agency”



25%

“YouTube videos”



18%

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



13%

“Online forums / blogs”

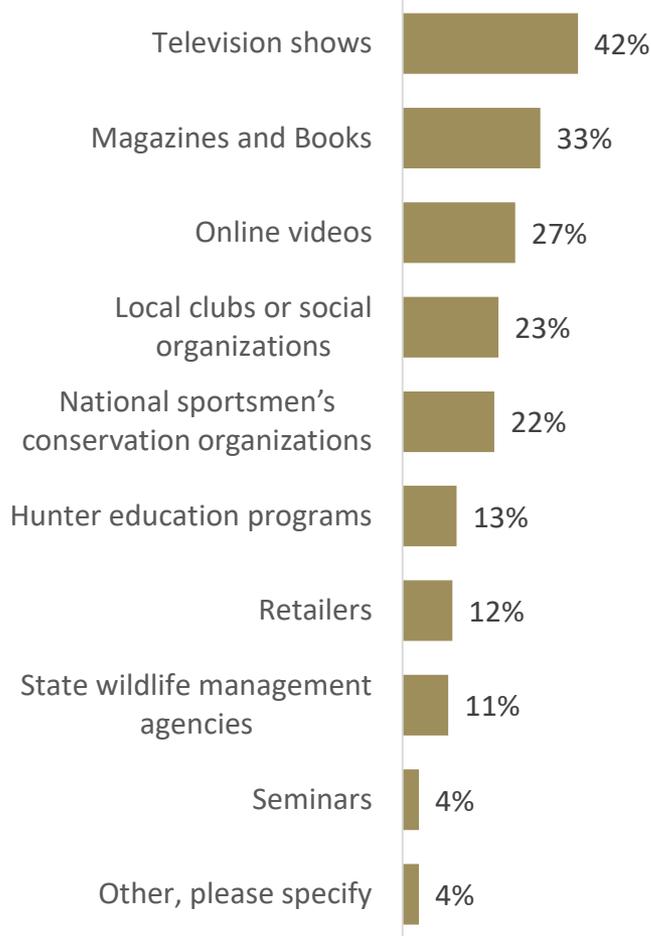
54% of hunters and 46% of shooters say “friends” are the greatest influence in trying new types of hunting and shooting activities. Generating awareness through local ranges, providing programs hosted by outdoor retailers and state wildlife agencies and encouraging active shooters to invite friends will help more people engage in the sport.

MOST INFLUENTIAL SOURCES FOR TRADITIONAL CENTERFIRE RIFLE

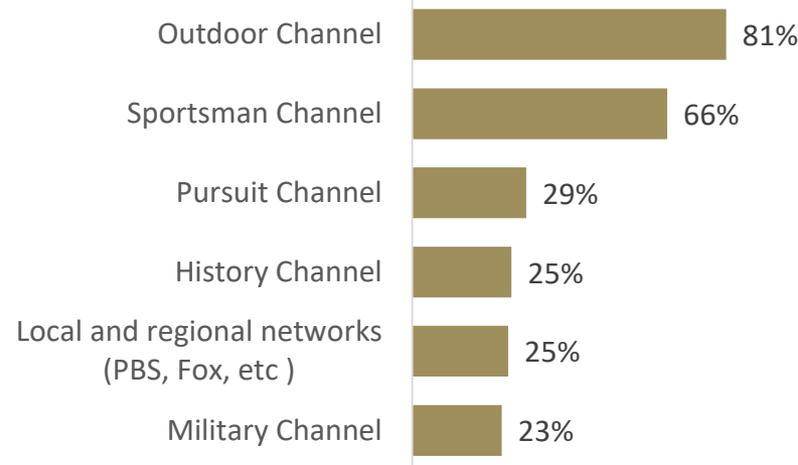
These hunters and shooters can be reached and influenced primarily through television and print.



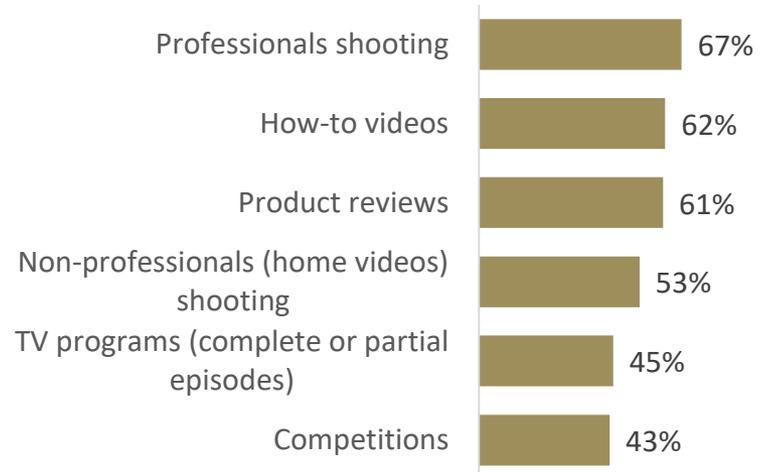
TOP SOURCES



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 shooting? (N=3,166); Which type of online videos have you viewed with respect to influencing you to try different types of shooting? (N=843). What channel did you watch shooting, hunting and fishing programs on? (N=1,311).

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.

