

SECTION ONE

THE PATH TO PARTICIPATION IN SHOOTING SPORTS



The Path to Participation

A primary objective of this research is to understand the path hunters and shooting sports participants take after their initial exposure to firearms. Identifying probable pathways to shooting sports adoption can help manufacturers and retailers develop marketing programs designed to nudge hunters and shooters more quickly down a path that is highly likely to be satisfying for participants. Speeding up this process will mean that shooters are participating more fully for a longer period time so that they are likely to purchase firearms, ammunition and ancillary products and services over a longer period of time.

To construct the pathway, respondents were asked a series of questions including:

- How they were initially exposed to firearms and/or firearms related activities
- How long ago they were first exposed to firearms
- The length of time that elapsed between when they were initially exposed and when they purchased or received their first firearm
- If participants have tried more than one activity and in what order they tried them
- How much time elapsed between one activity and another

Most respondents were initially exposed to firearms by family (66.9%) with initial exposure nearly equally split between target shooting/plinking (33.6%) and hunting (30.3%). Exposure through friends (15.9%) is a distant second. Friends were three times more likely to expose respondents to target shooting/plinking than hunting. Nearly as many respondents (14.2%) who were initially exposed by friends indicated their first exposure was when they purchased a firearm. Of those whose first exposure was through a personal purchase, nearly half (45.1%) purchased a firearm for self-defense and 21.8% purchased a firearm to shoot with friends and/or family.

Initial Exposure to Firearms and Related Activities (%)



Q5. Please think back to the time that you first became aware of firearms and/or firearms related activities. How did you get your first exposure to firearms?

SECTION TWO

ACTIONFAN AND FANDOM



The second primary objective of this study is to identify the linkages between the personality and characteristics of shooting sports and the attitudes, emotions and personality characteristics of participants' to determine the relationships that drive the creation and sustain avid (rabid!) shooting sports fans. The outcome and usefulness of this approach is a clear understanding of the communications and activities that are most likely to take participants at various levels of hunting and shooting sports engagement down the path to fandom.

The ActionFan methodology requires that measures be taken on a variety of behavioral, attitudinal and emotional characteristics using rating scales. The ratings are then subjected to a statistical procedure that combines the characteristics into meaningful concepts commonly referred to as factors. The factors are then used to create a model that:

- Defines the concept of Fandom as it pertains to hunting and shooting sports
- The stages on the path to Fandom
- The attributes impacting each stage that can be influenced to help guide participants down the path to Fandom.

In all, 61 factors were generated from a total of 166 attribute ratings.

For purposes of the ActionFan analysis, respondents were randomly assigned to an activity they participate in at least 3 or more days per year or, in the case of hunting, at least once or twice per year. This means that participants were not necessarily assigned to evaluate the activity that they participated in most frequently or were most passionate about. Modeling requires variability to determine the differences between high participation, fully engaged, and passionate participants versus those that are less so or not at all.

Not all factors are useful for constructing the path to Fandom nor do all factors exert influence on Fandom. Only a fraction of the factors, 19 in all, were useful for this purpose. The following provides an overview of the categories and the number of factors that are useful in understanding and influencing Fandom.

Loyalty – Loyalty to an activity is similar to exhibiting loyalty for a brand. Loyalty to a shooting activity involves a commitment and faithfulness to the activity that can be exhibited in a number of ways including increased participation, willingness to travel and increased expenditures on equipment and supplies to participate. Out of 27 loyalty characteristics, five were useful for defining Fandom.

Activity Personality – Like people, shooting activities have personalities. Personality characteristics are conveyed to people, whether they are active participants or not, through actions, imagery, communications and by other participants. It is how people perceive the activity. Out of 35 activity personality characteristics tested four factors were identified that impact Fandom.

Activity Promise – When individuals participate in an activity, they have certain expectations of what they will gain from an investment of time and resources. If an activity delivers on these expectations, participants are likely to continue participating but if the activity falls short, interest may fade. Out of 33 promise characteristics evaluated, one factor was identified that impacts Fandom.

Evoked Emotions – Shooting activities can evoke emotions from participants. If the emotions are positive in that they help people feel good, special, important, skillful, etc. they will be drawn to the activity and those who already participate will be provided with the stimulus that encourages continued participation. Out of 32 emotions rated four factors were identified that impact Fandom.

Personal Identity (Aspirations) – Personal identity is the complex combination of all the personal attributes - behavioral, temperamental, emotional and mental, that characterize a unique individual - in this case a shooting sports participant. Individuals see themselves as a combination of these characteristics - who they perceive themselves to be and what they desire or aspire to be. Activities that play a role in reinforcing participants' positive personal perceptions and also help participants to achieve

and radiate to others their aspirational selves are likely to experience increased participation. Out of 38 identity characteristics, a total of four factors impacted Fandom.

First we will introduce the basic model for the path to Fandom. Each stage on the path will be defined based on the elements comprising the stage. The stages on the path to Fandom cannot be directly affected by marketing activities but must be acted on indirectly through preliminary factors. We will define the preliminary factors and then discuss the actions that can be taken to encourage participation and ultimately Fandom. For purposes of this report only the attributes and factors that are useful in defining the model for Fandom will be discussed.

The Path to Fandom

The Path to Fandom for shooting activities is relatively simple. It is defined by five primary stages, Connection, Attachment, Community, Commitment and Evangelist. These stages cannot be influenced directly but must be impacted indirectly through marketing and communications activities, imagery and providing participation opportunities as defined by the preliminary factors that exert an influence on each stage. The values associated with each stage indicate the relative impact the stage has on Fandom.

Connection has the strongest impact on Fandom. Its impact is 1.5 times greater than Evangelist (0.35) and Community (0.32) and twice that of Attachment (0.25) and Commitment (0.25). This means that efforts to help participants develop the initial connection with a shooting activity are likely to have the most influence in creating a shooting sports fan.

