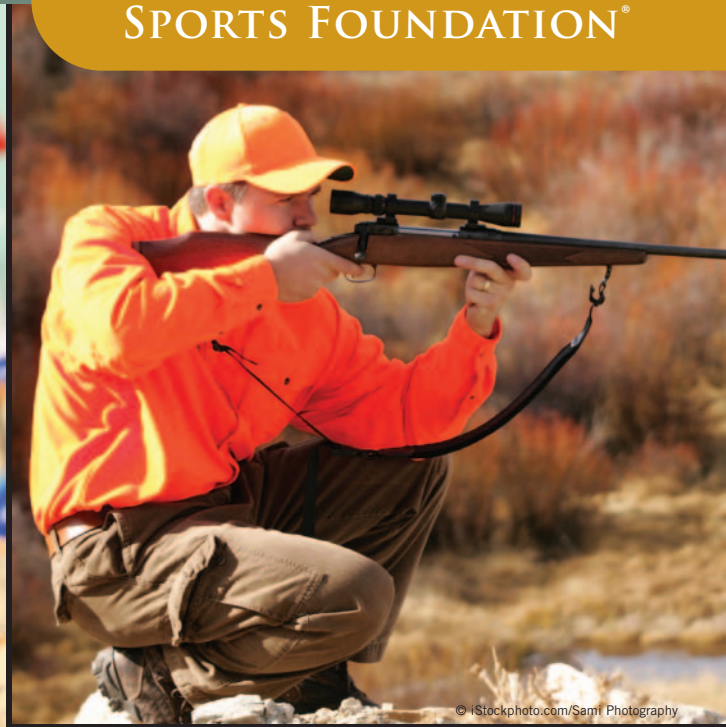


A PORTRAIT OF HUNTERS AND HUNTING LICENSE TRENDS: NATIONAL REPORT

NATIONAL SHOOTING
SPORTS FOUNDATION®



Presented by The National Shooting Sports Foundation Research Department
on behalf of participating State Environmental Agencies by:



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NSSF Comprehensive National Report

With many states recently converting from traditional paper-based licenses to electronically-issued licenses, it is now possible to develop valuable new insights about hunters' demographics, lifestyle and hunting habits. In 2009, in partnership with 17 state wildlife agencies, the NSSF funded a comprehensive review of hunting license data to better understand who hunts in the United States, and how participation in hunting can be strengthened. The states included in this effort were:

| | | |
|----------|---------------|----------------|
| Alabama | Minnesota | Oklahoma |
| Colorado | Mississippi | Oregon |
| Florida | Montana | South Carolina |
| Iowa | New Hampshire | Utah |
| Indiana | New York | Vermont |
| Michigan | Ohio | |

The results are intended to enhance hunting promotion campaigns and help hunting-related companies improve marketing and advertising efforts.

This report summarizes the regional and national findings for the following questions:

- Do most hunters buy a license every year?;
- What are the demographic and lifestyle characteristics for the different segments of hunters in the U.S.?
- Which species are targeted by different types of hunters?
- And more.

Under agreements protecting the confidentiality of state license data, the 17 partnering wildlife agencies provided complete hunting license data for the past three to six years. With multiple years of data, it was possible to track license purchasing activity for all residents and nonresidents who purchased at least one hunting license during the study's timeframe. The details allow the states and others to better serve the hunting public and improve wildlife management efforts through a better understanding of hunters' motivations and needs.

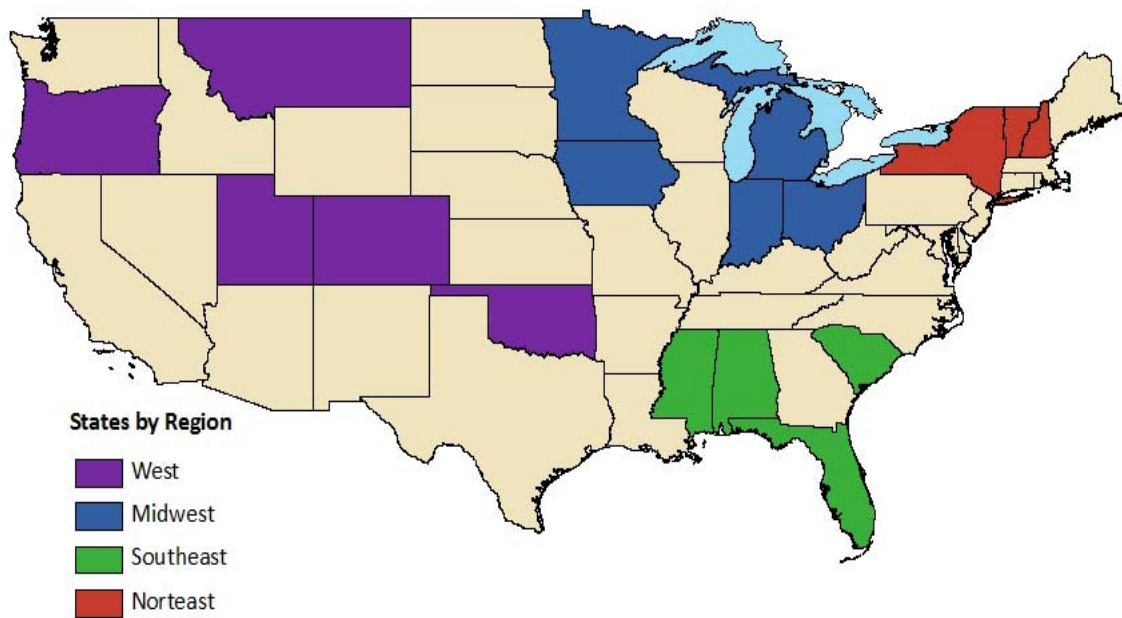
Each state's hunter license data were analyzed in part using a data service known as "Community Coder™". Provided by ESRI of Arlington, VA, Community Coder™ is built from Census Bureau data and other sources and can describe the expected lifestyle of an individual household based on its location. Every neighborhood, down to the block level, has been categorized and divided into 65 types of lifestyle, or "Tapestry™", segments based on demographic variables such as age, wealth and income, occupation, ethnicity, family status, education and many types of consumer behavior characteristics. For each state, individual license records for the past five years were appended with Community Coder™ data. The aggregated results allowed us to learn more about the lifestyles of people who purchased hunting licenses and identify the types of people who did not. Lifestyle analyses have been used for years by corporate America to improve marketing and communications efforts. By combining Community Coder™ and license sales data, it is possible to identify regions and neighborhoods where opportunities exist to improve hunting marketing efforts in each state. Hand in hand with this is the identification of the most effective media to use in hunting promotions. Report results will be useful in improving future recruitment and retention efforts.

The individual state reports are available from the National Shooting Sports Foundation. To learn how to obtain copies or additional information contact Jim Curcuruto, NSSF Director of Research at jcurcuruto@nssf.org (203) 426-1320.

REGIONAL SUMMARIES

The state results have been compiled into this comprehensive report. Considerations were made when comparing states with different numbers of years of data (three to six years) and different species. In some cases, not all states were used to arrive at a national average. Regional and national averages are weighted averages based on the number of hunters in each state (resident or nonresident depending on the data summarized). The regions to which the states were assigned are depicted in Figure 1.

Figure 1



This report contains a brief description of the findings at the national and regional levels. For additional information contact Jim Curcuruto, NSSF Director of Research at jcurcuruto@nssf.org (203) 426-1320 or Rob Southwick at Southwick Associates at info@southwickassociates.com (904) 277-9765.

HUNTER CHURN

Not all hunters purchase a license every year. On the national scale, only 78% of resident hunters and 49% of nonresident (or out-of-state) hunters who purchased a hunting license one year can be expected to purchase again the following year (Figure 2). On a national scale, only 35% of resident hunters and 7% of nonresident hunters can be expected to purchase a hunting license in five consecutive years (Figure 3). Over 40% of resident hunters will buy a license in only one or two years over a five year period (Figure 3). Future hunting marketing efforts may want to note that it is likely easier to increase the frequency of activity among people who already have hunting skills and equipment than creating a new hunter from scratch.

Figure 2

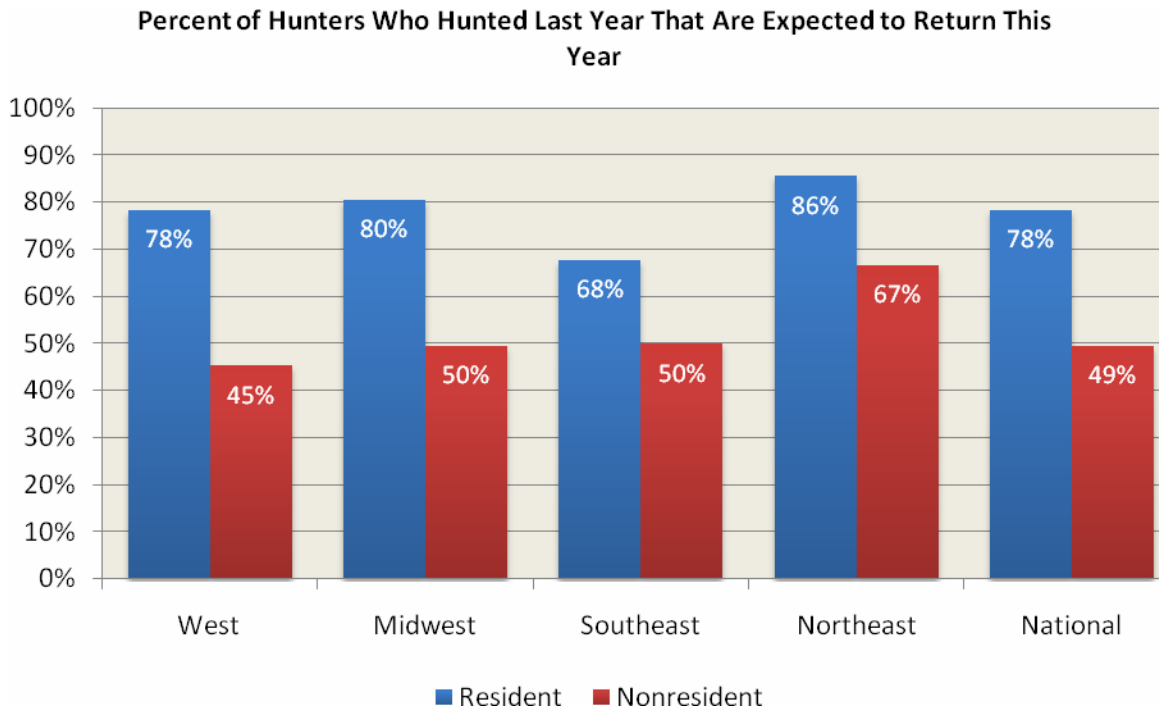
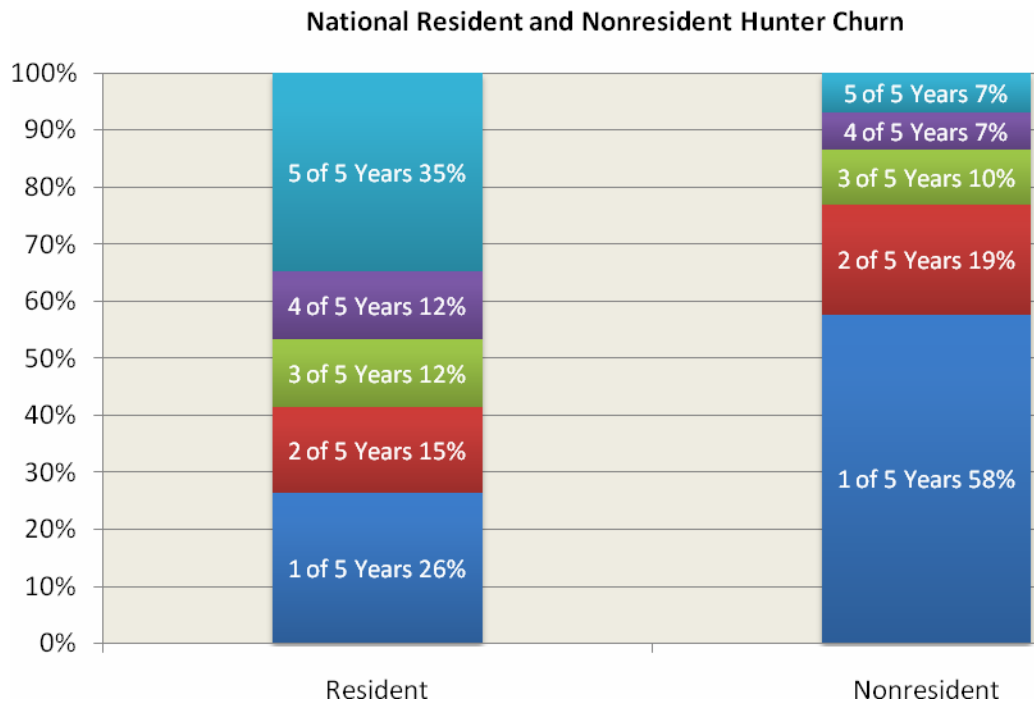


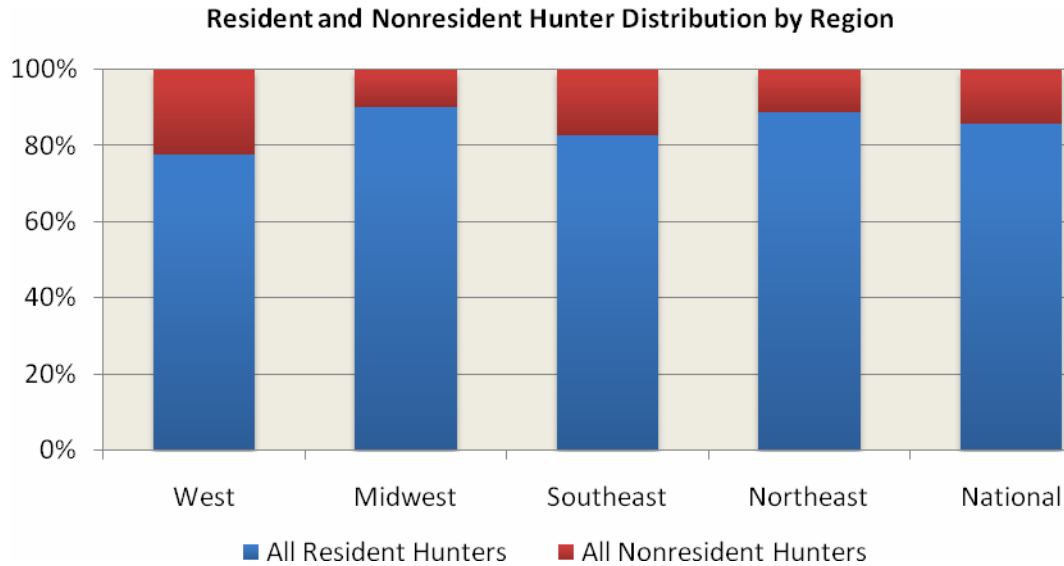
Figure 3



HUNTER DEMOGRAPHICS

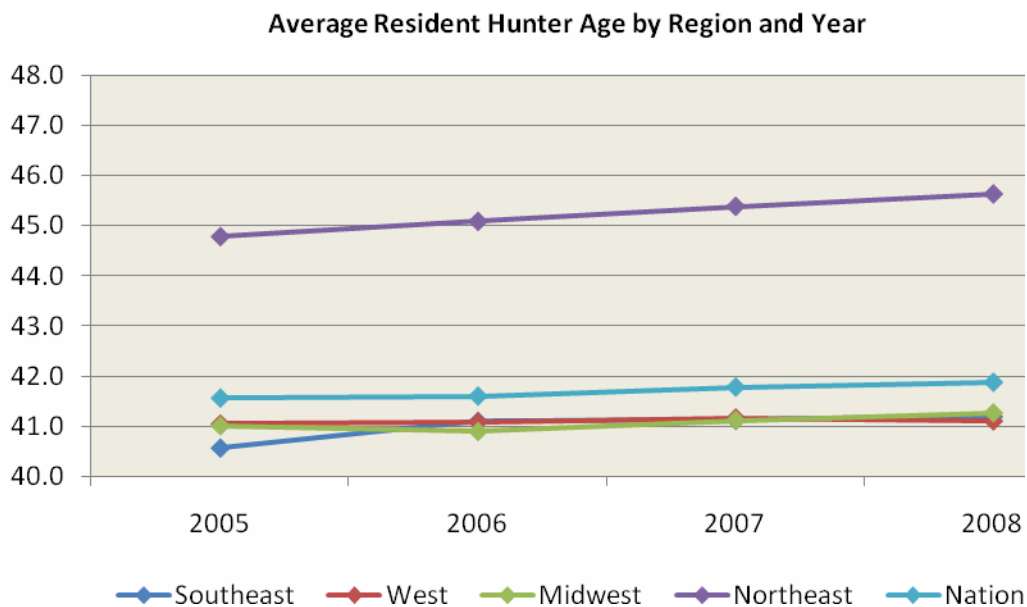
Not surprisingly, the majority of hunters in any state are residents – greater than 80% on a national basis (Figure 4). The percent of hunters who are nonresidents varies by region – with the West and Southeast regions drawing a higher percentage of nonresident hunters.

Figure 4



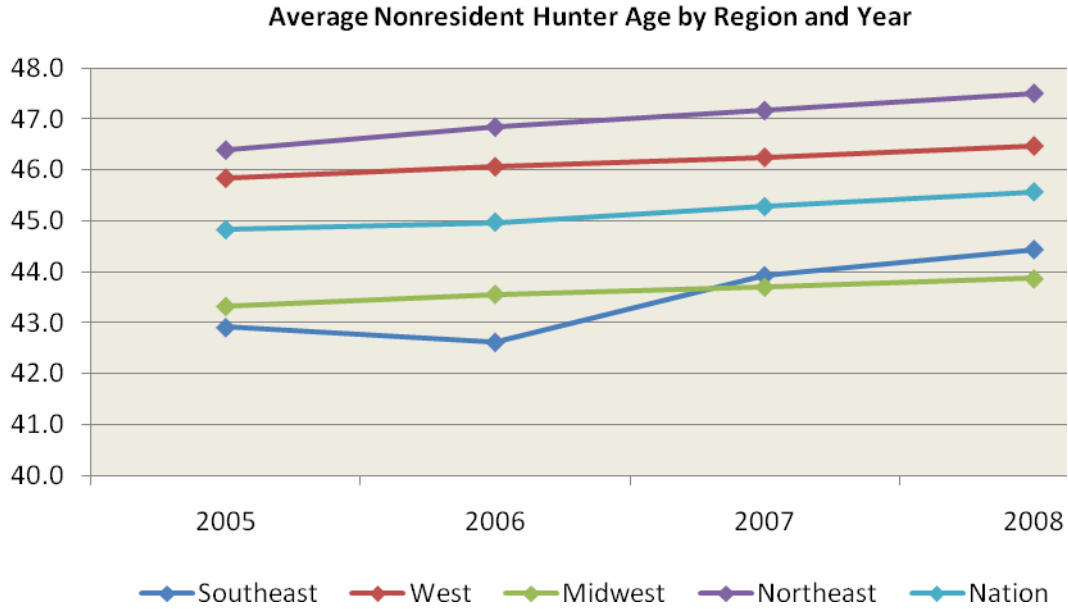
On average, resident hunters are 41.8 years old (Figure 5). Those hunting in the Northeast are considerably older, on average, than those in the rest of the country. The national hunting base is aging, with fewer young hunters filling the gaps that the older hunters are creating when they no longer hunt.

Figure 5



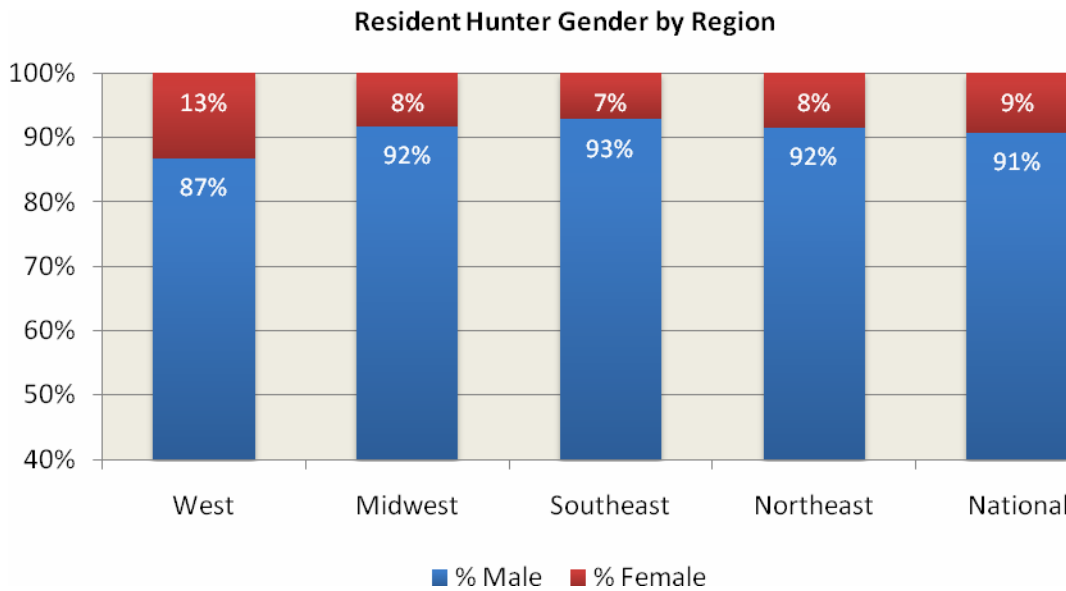
The nonresident hunting base is aging at twice the rate of resident hunters (Figure 6). All states in the study had an increase in average age each year, except for Mississippi in 2006. This is quite likely a result in regulation change rather than genuine recruitment of younger hunters.

Figure 6



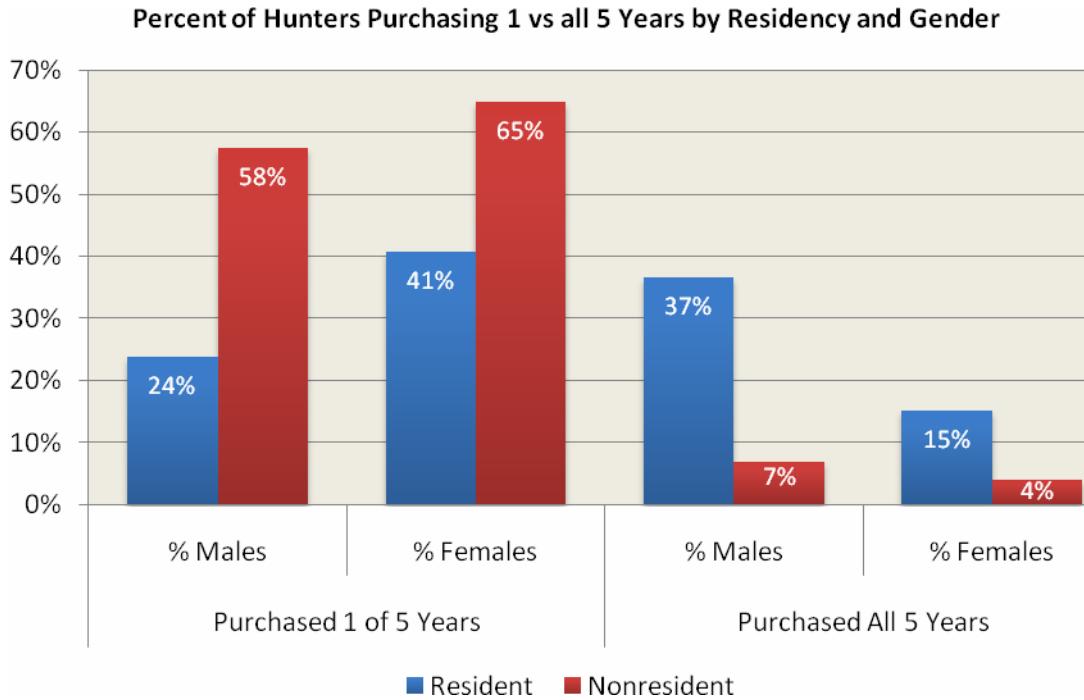
Hunters are overwhelmingly male, outnumbering women 9 to 1 (Figure 7). Females are more strongly represented in the West than in the rest of the nation.

Figure 7



Male hunters are more likely to purchase a hunting license every year (37%), while only 15% of females purchase every year (Figure 8). Conversely, females are more likely to purchase a hunting license only once in five years (41%) compared to males (24%).

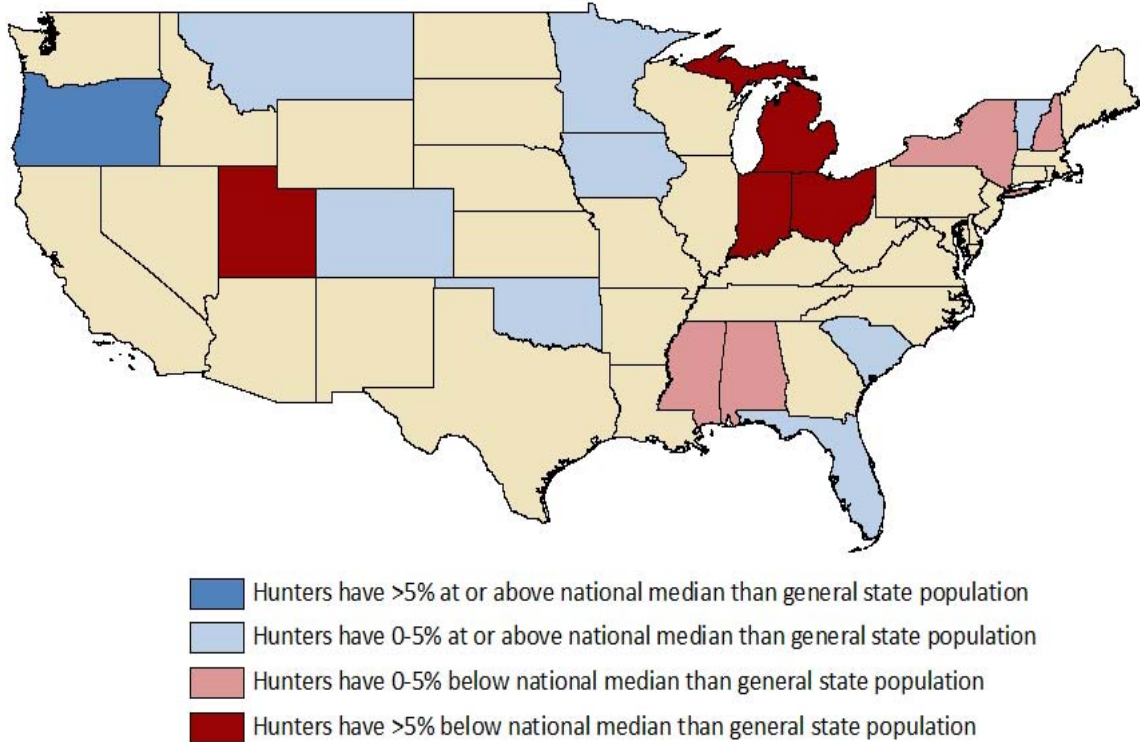
Figure 8



Another comparison of hunters is the median household income. Figure 9 shows in color those states that participated in this report. Hunters in states shaded blue have on average a slightly higher annual income than the average state resident. Hunters in red states have an income slightly lower than the average state resident. Though the states in this study were not randomly selected, a majority of states' hunters have higher-than-average incomes. Stereotypes portraying the average hunter as low-income may be off the mark.

Figure 9

Comparison of Hunter and State Median Household Income



The urban/rural setting where a hunter lives also dictates their frequency of purchasing a hunting license, and therefore is a good barometer of overall hunting participation. The distribution of resident across urban and rural areas varies by region (Figure 10). The Southeast region has a much stronger rural component (65%) than the West (48%) or Northeast (46%).

Generally, nonresident hunters (45%, Figure 11) are less likely to live in rural areas than resident hunters (53%). This is not surprising as people living in rural areas are less likely in need of traveling to other states to find access to good hunting. Within nonresident hunters, the distribution also varies by region. Northeastern nonresident hunters are more likely to live in urban areas (34%) than those hunting in the Southeast (24%). For most states, nonresident hunters are more affluent and urban-centered than their resident counterparts. Again, this is not surprising given the costs associated with travel and accessing lands via leases, guides or other means.

Resident hunters who live in a rural setting are more likely to purchase a hunting license every year (36%) than hunters who live in an urban setting (30%, Figure 12). Conversely, a resident hunter who lives in an urban setting is more likely to purchase in only one of five years (29%) than one who lives in a rural setting (24%). Figure 13 shows a similar result when comparing avid hunters (who purchase a license five of five years) to infrequent hunters (who purchase one or two times in five years).

Figure 10

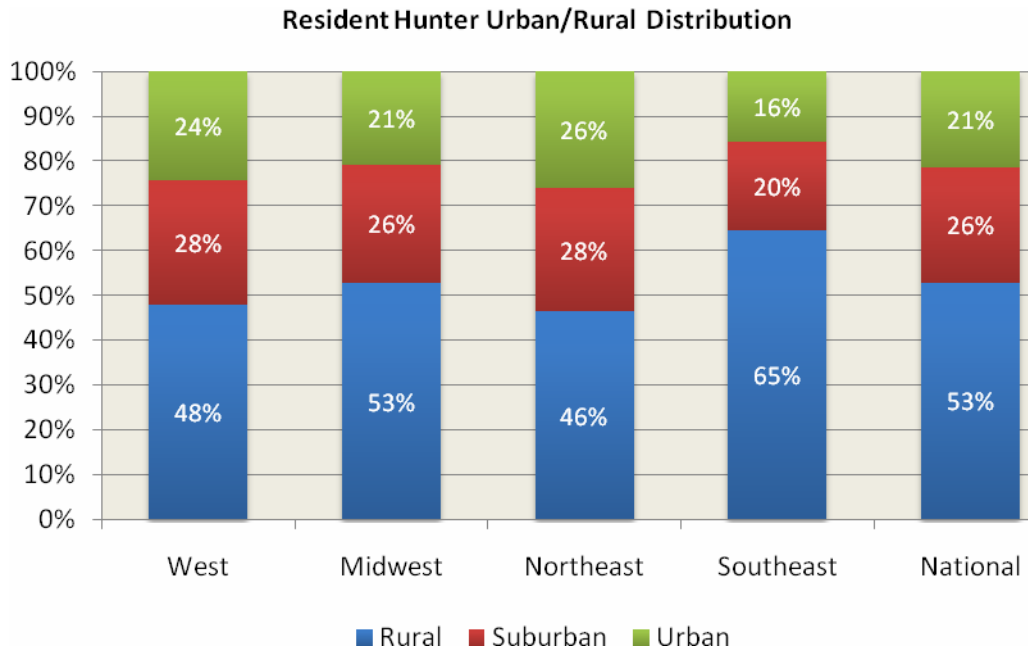


Figure 11

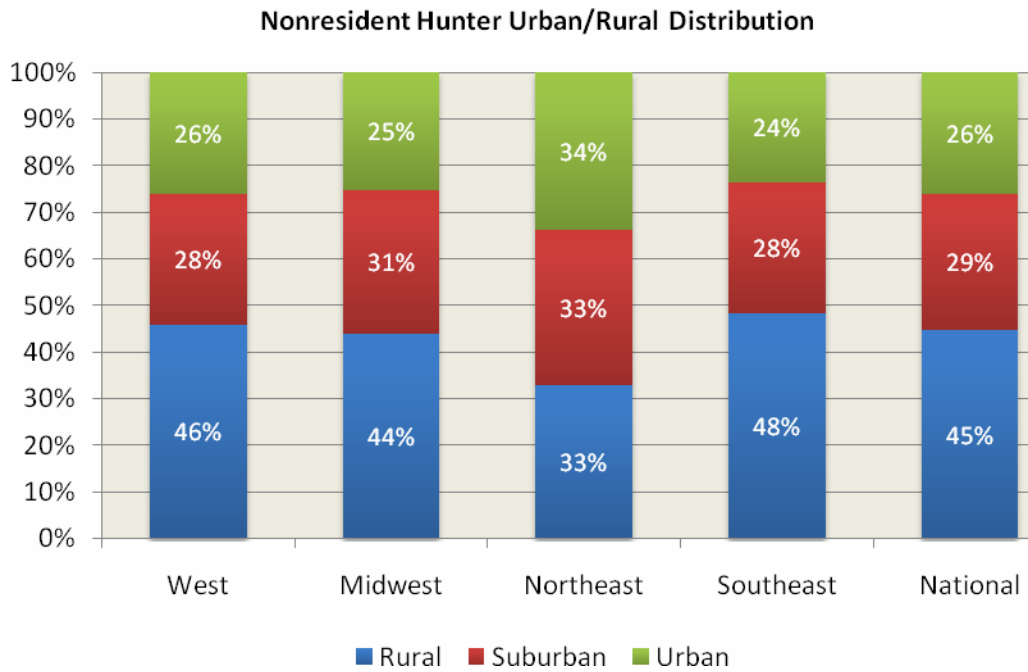


Figure 12

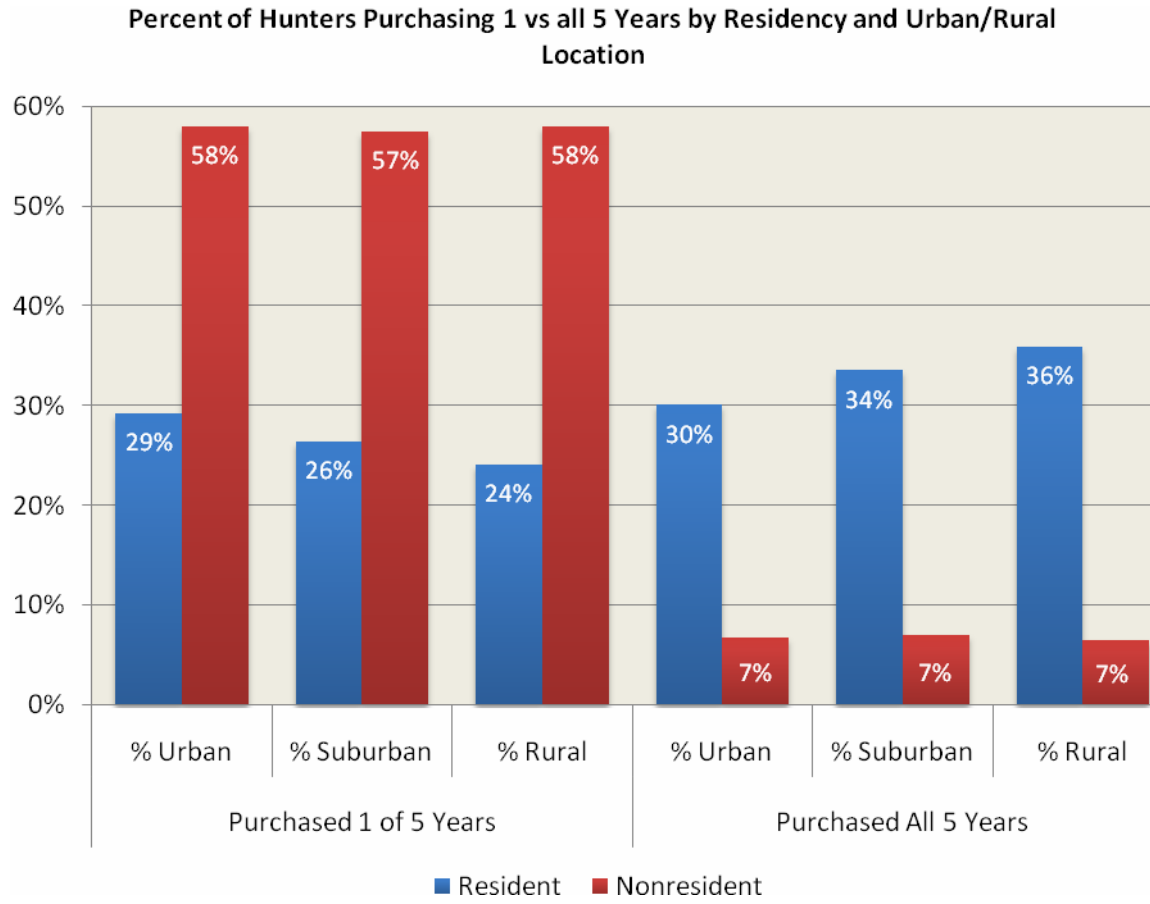
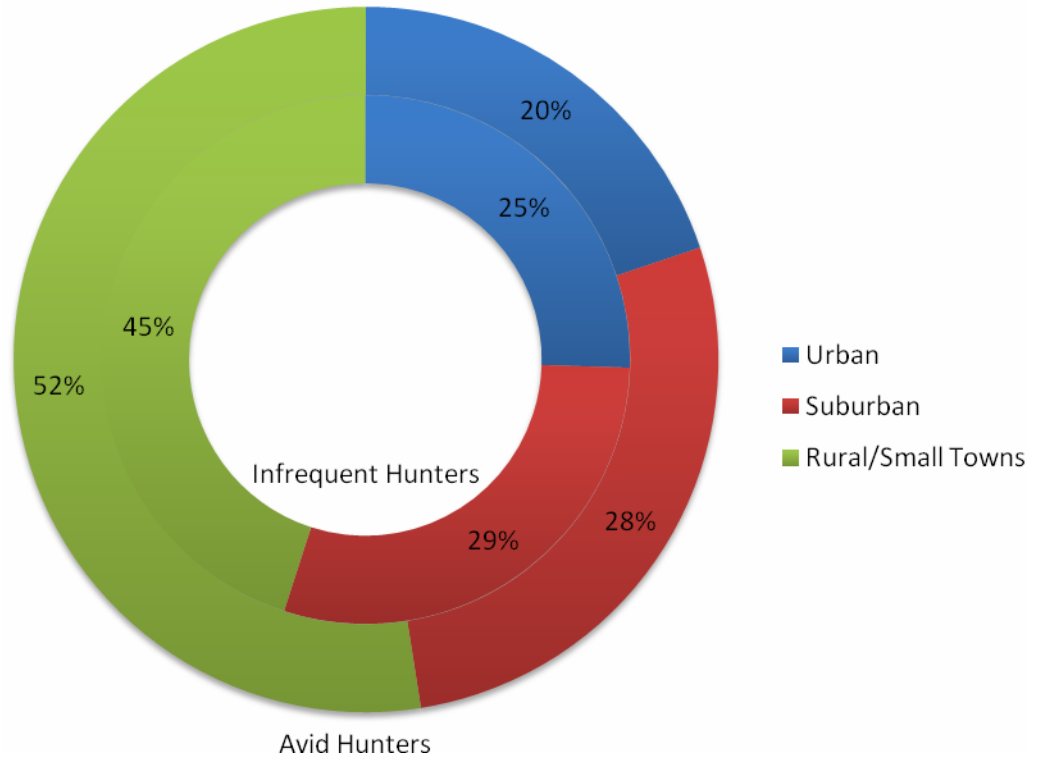


Figure 13

Distribution of Rural/Urban Location for Resident Avid and Infrequent Hunters



LIFESTYLE ANALYSIS

Stating the obvious, no two people are alike. Even two people of the same age, race, and gender will most likely have significant differences in regards to their tastes, preferences and habits. The characteristics defining a person's taste, preferences and habits are collectively known as their lifestyle. More than physical characteristics, lifestyles are often a better indication of what people will buy and how they will spend their free time. To effectively understand who is more likely to hunt, who is more likely to quit and how to better communicate with hunters, this report examines and classifies hunters based on their lifestyle characteristics.

Lifestyles are categorized using many variables including a person's income, age, urban/rural living, type of housing, where they are in life (single, family, empty-nest, retired, etc.) and much more. However, these data are not available from the State's license databases. To understand who is more likely to buy or not buy a hunting license, Community Coder™ lifestyle data are used. ESRI® of Arlington, Virginia provides the Community Coder data service. Community Coder™ is built from Census Bureau data and other sources. Abbreviated descriptions of each of the 65 lifestyle Tapestry segments are in Table 1 (found at the end of this document), and interesting detailed descriptions of each segment are located in Appendix A at <http://www.nssf.org/share/PDF/2009NSSFNationalReportAppendices.pdf>

Another way to categorize customers is using their LifeMode designation and urbanization groups. The 65 Tapestry segments are aggregated into 12 LifeMode groups based on consumption patterns and demographics (Table 2). A detailed description of each LifeMode is in Appendix B (starting at page 68) at <http://www.nssf.org/share/PDF/2009NSSFNationalReportAppendices.pdf>

Table 2. LifeMode group summary descriptions

| LifeMode | Description |
|--------------------------|--|
| L1 High Society | Affluent, well-educated, married-couple homeowners |
| L2 Upscale Avenues | Prosperous, married-couple homeowners, across different housing |
| L3 Metropolis | City dwellers in older homes reflecting the diversity of urban culture |
| L4 Solo Acts | Urban young singles on the move |
| L5 Senior Styles | Senior lifestyles by income, age, and housing type |
| L6 Scholars and Patriots | College, military environments |
| L7 High Hopes | Young households striving for the "American Dream" |
| L8 Global Roots | Ethnic and culturally diverse families |
| L9 Family Portrait | Youth, family life, and children |
| L10 Traditional Living | Middle-aged, middle income, Middle America |
| L11 Factories and Farms | Hardworking families in small communities, settled near jobs |
| L12 American Quilt | Households in small towns and rural areas |

Over 50% of resident hunters are represented by just three of the twelve LifeMode groups: Factories & Farms, American Quilt and Upscale Avenues (Figure 14). Factories & Farms and American Quilt are lower income, small community neighborhoods. Upscale Avenues are quite affluent and vary in location from urban to rural settings. The percent of hunters represented by each of these groups varies by region.

American Quilt, Upscale Avenues, and High Society represent approximately 50% of the nonresident hunting community (Figure 15). High Society neighborhoods are the most affluent of all LifeModes, and contribute to about 16% of nonresident hunters. This again supports the finding that nonresident hunters tend to be more affluent than resident hunters.

Figure 14

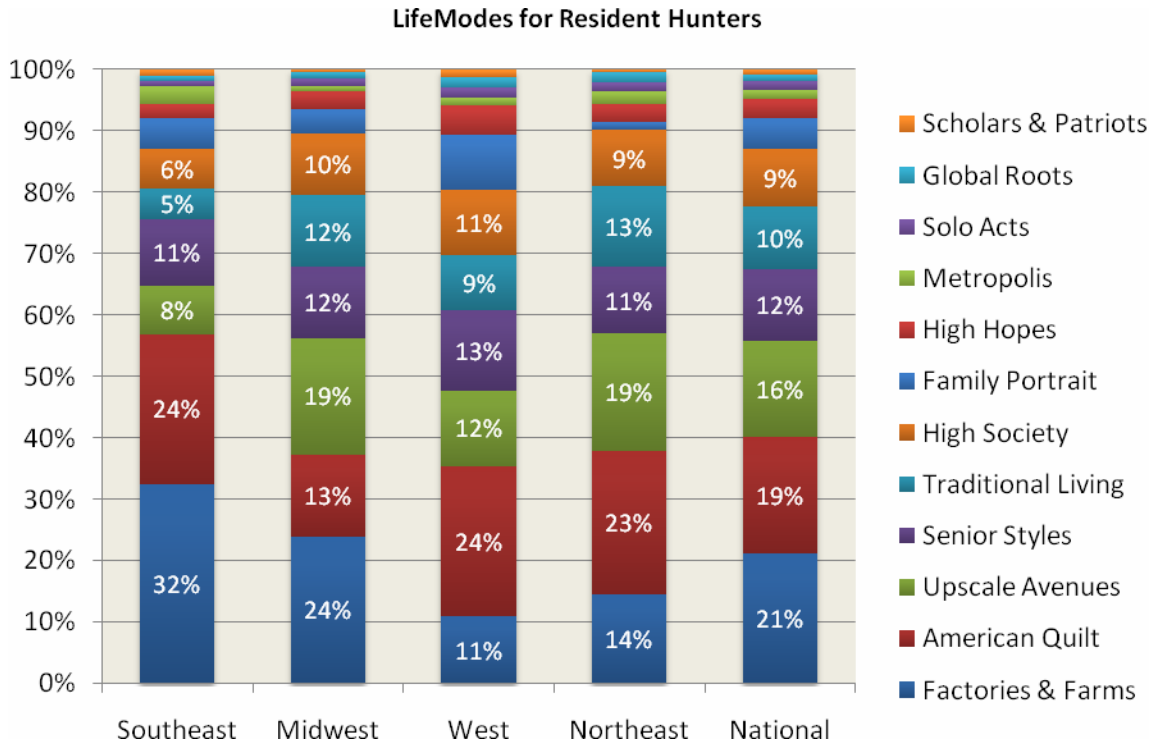
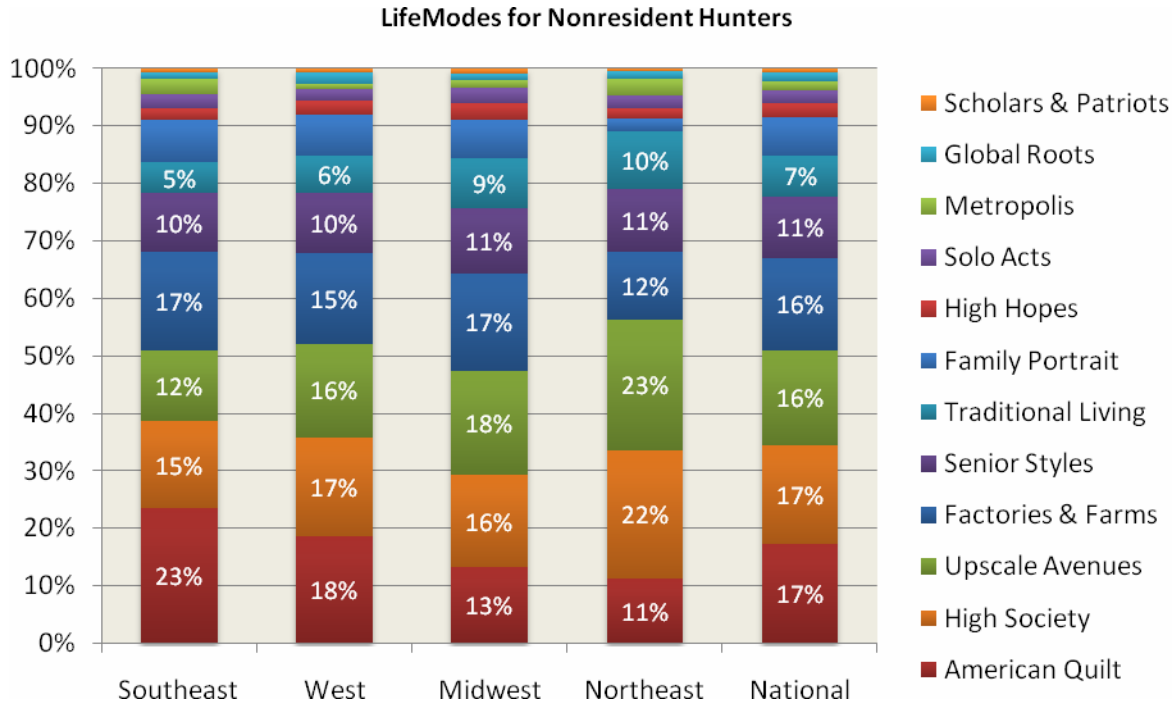
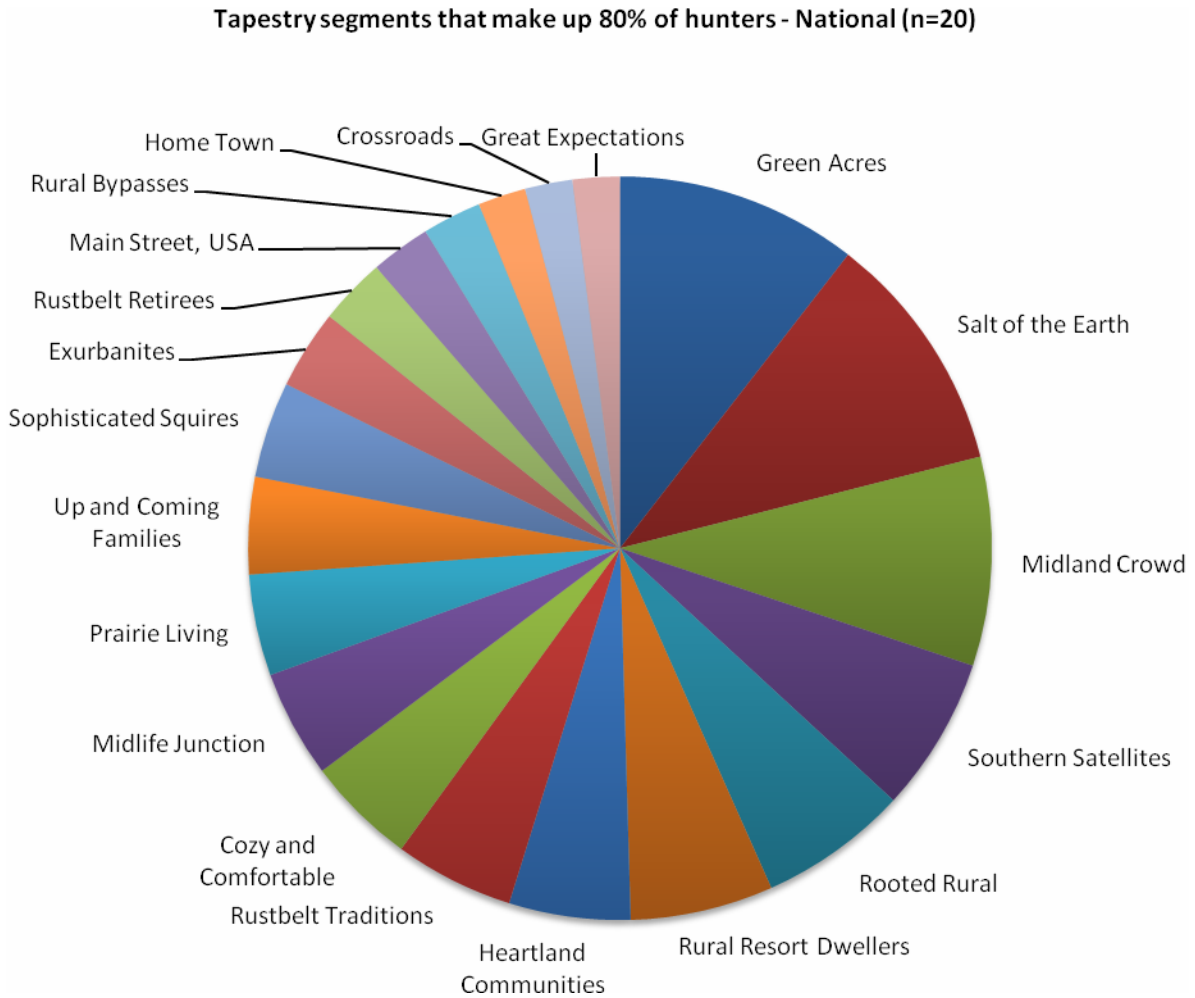


Figure 15



Each LifeMode represents multiple Tapestry segments. Each Tapestry segment provides detailed definitions of neighborhoods – down to the city or rural block - by their socioeconomic and demographic composition. One quarter of resident hunters are represented by just three (out of 65) segments: Green Acres, Salt of the Earth, and Midland Crowd (Figure 16). All of these segments are mainly white, married couples with middle to upper middle incomes with high school diplomas and some college education. The seven top segments provide over half of all hunters. Classifying hunters using lifestyle analyses is useful for individual companies needing to focus their marketing efforts, and for national hunter recruitment and retention efforts.

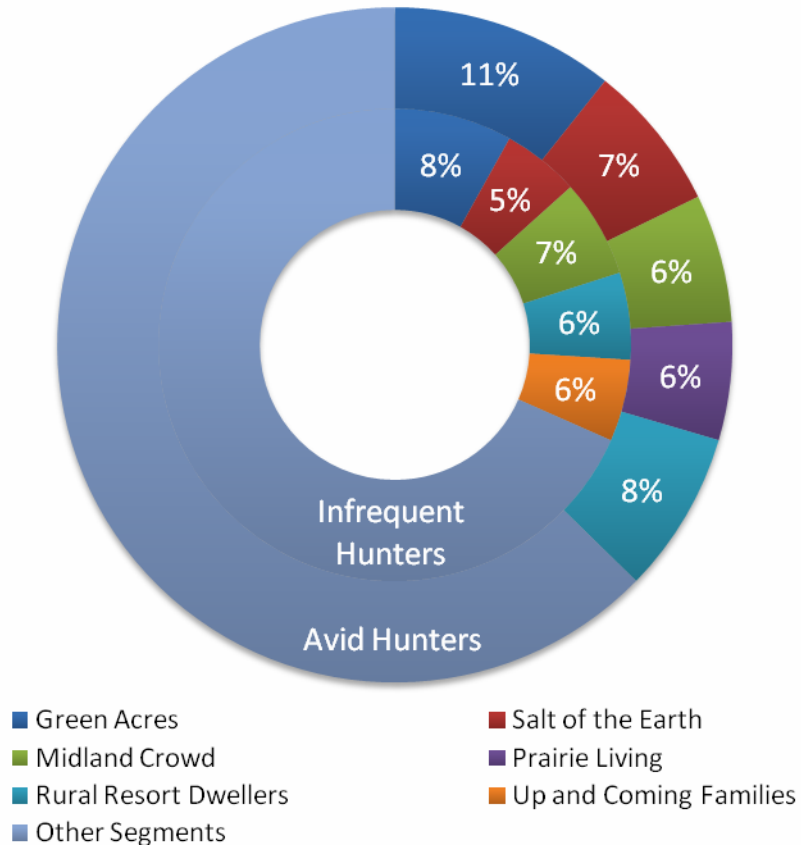
Figure 16



The distribution of Tapestry segment varies among hunters who regularly buy hunting licenses and those who only hunt occasionally (Figure 17). Figure 17 compares the distribution of the top five Tapestry segments of avid hunters (who purchased in five consecutive years) to infrequent hunters (who purchased in only one or two of the same five years). Avid hunters tend to be more concentrated in the top three tapestry segments (Green Acres, Salt of the Earth, and Midland Crowd) than infrequent hunters. A loss of interest in hunting within these neighborhoods will have a significant impact on hunting participation.

Figure 17

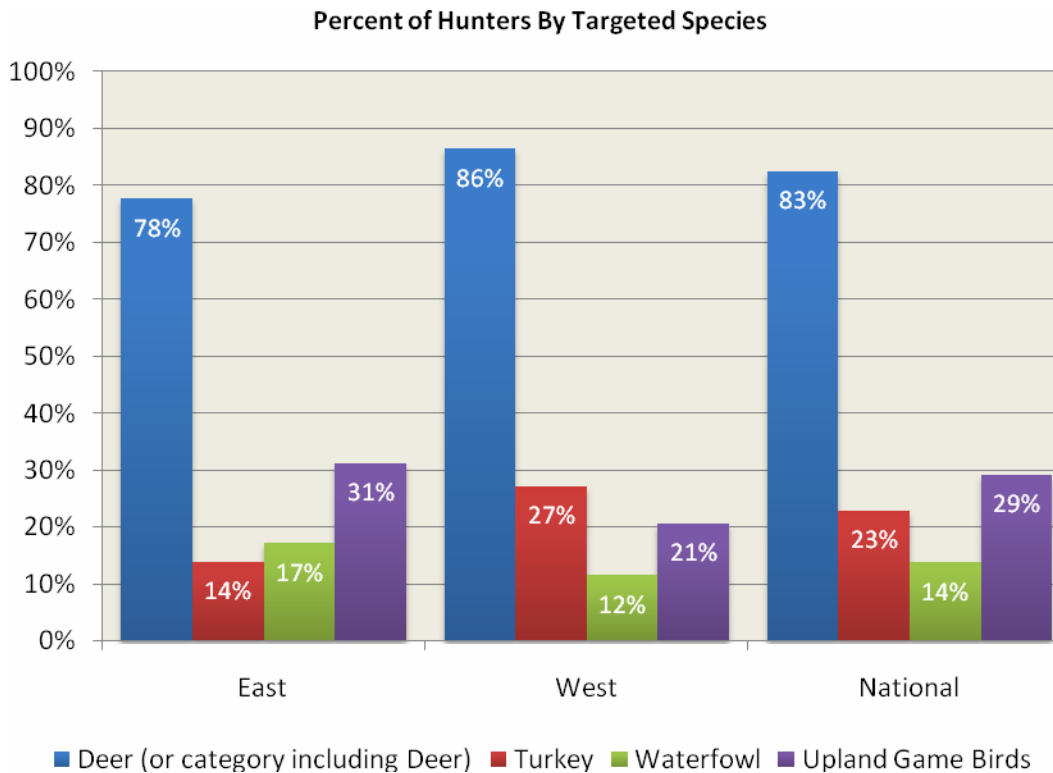
Distribution of Tapestry segments for resident avid and infrequent hunters



SPECIES TARGETED

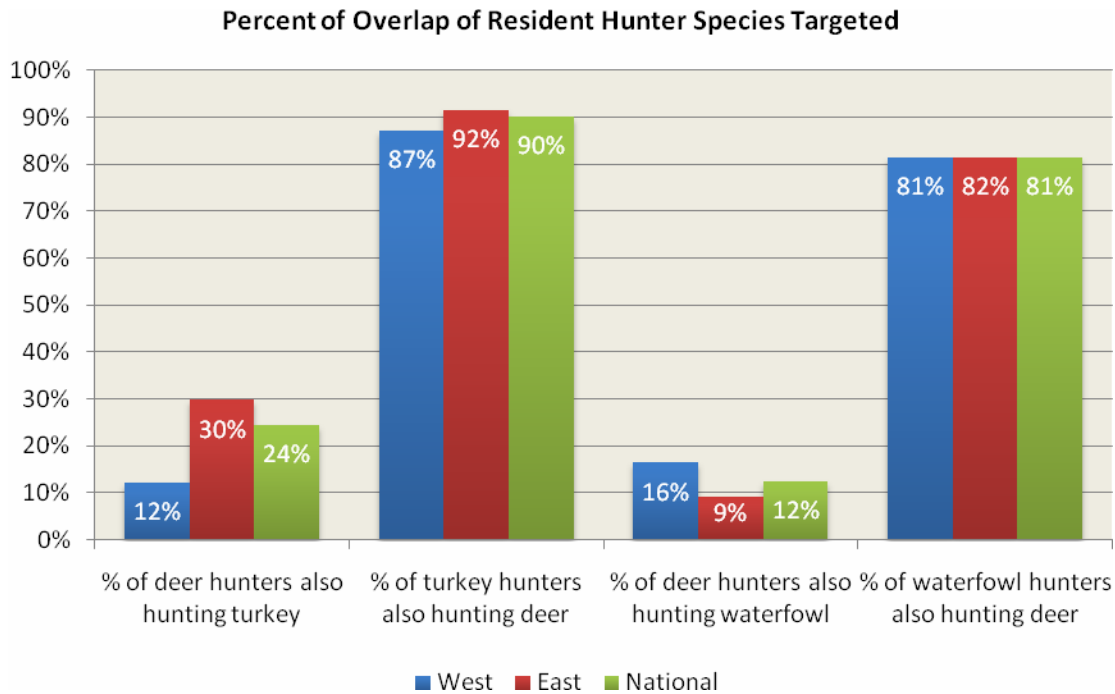
The license data permitted a peek into the species targeted by hunters, and the overlap between species targeted. Figure 18 shows the percent of hunters that purchased the privilege to pursue each of the following species: deer, turkey, waterfowl, and upland game birds. Deer were the most targeted species with 83% of hunters purchasing licenses that provided deer privileges.

Figure 18



On some occasions, a deer hunter is only a deer hunter. One quarter (24%) of deer hunters currently hold turkey hunting privileges, but ninety percent of turkey hunters hold deer privileges (Figure 19). This indicates greater potential success in boosting the number of turkey hunters by recruiting from the ranks of deer hunters compared to approaching lapsed hunters or converting non-hunters into hunters. To a slightly lesser extent, the same is true for waterfowl hunters of whom 81% are also deer hunters.

Figure 19



OTHER INFORMATION AVAILABLE IN STATE REPORTS

The individual state reports are much more detailed than this summary overview. In addition to the topics described in this report, other topics including hunter access issues, hunter education availability, and hunters upgrading and downgrading licenses are also described. These additional topics vary widely from state to state, and were not conducive to national and regional quantification.

FOR MORE INFORMATION

To obtain detailed descriptions of Tapestry and LifeMode segments, visit <http://www.nssf.org/share/PDF/2009NSSFNationalReportAppendices.pdf>. To obtain copies of the individual state reports, please contact Jim Curcuruto, NSSF Director of Research jcurcuruto@nssf.org (203) 426-1320. Please contact Southwick Associates at info@southwickassociates.com with questions or comments about the contents of this report.

Table 1. Abbreviated Tapestry™ Segment Descriptions
 (adapted from definitions provided by ESRI of Arlington, VA)

| | Household/ Median Age | Median Household Income | Employment | Education | Race/ Ethnicity | Lifestyle |
|--|--|--|---|---|----------------------------|---|
| 6. Sophisticated Squires— LifeMode: L1 High Society; Urbanization: U7 Suburban Periphery I | Married- couple families/38.3 | Upper middle | Professional, management | Some college, bachelor, graduate degree | White | Home improvement; landscaping |
| 7. Exurbanites— LifeMode: L1 High Society; Urbanization: U7 Suburban Periphery I | Married- couple families/44.8 | Upper middle/ \$88,531 | Professional, management | Some college, bachelor, graduate degree | White | Photography, golf, biking, hiking |
| 12. Up and Coming Families— LifeMode: L9 Family Portrait; Urbanization: U7 Suburban Periphery I | Married couples with kids/31.9 | Upper middle | Professional, management | Some college, bachelor, graduate degree | White | Eat at Chic-fil-A; own a dog |
| 17. Green Acres— LifeMode: L2 Upscale Avenues; Urbanization: U10 Rural I | Married- couple families/40.7 | Upper middle \$65,074 | Professional, management, skilled | Some college | White | Do gardening; attend country music shows |
| 18. Cozy and Comfortable— LifeMode: L2 Upscale Avenues; Urbanization: U8 Suburban Periphery II | Married- couple families/42.1 | Upper middle | Professional, management | Some college | White | Dine at family restaurants; shop at Kohl's |
| 24. Main Street USA— LifeMode: L10 Traditional Living; Urbanization: U5 Urban Outskirts 5 | Mixed/36.8 | Middle/ \$56,882 | Professional, management, skilled, services | Some college | White | Buy kids' toys, games, clothes, watch court show on TV |
| 25. Salt of the Earth— LifeMode: L11 Factories and Farms; Urbanization: U10 Rural I | Married- couple families/41.4 | Middle/ \$50,913 | Skilled, professional, management | HS graduate, some college | White | Gardening, outdoor projects; go hunting and target shooting |
| 26. Midland Crowd— LifeMode: L12 American Quilt; Urbanization: U10 Rural I | Married- couple families/37.0 | Middle/ \$50,462 | Skilled, professional, management | HS graduate, some college | White | Own pets; go hunting and fishing |
| 29. Rustbelt Retirees— LifeMode: L5 Senior Styles; Urbanization: U8 Suburban Periphery II | Married couple no kids, singles/45.0 | Middle | Professional, management, skilled, services | HS graduate, some college | White | Play bingo; belong to fraternal orders, unions, etc. |
| 31. Rural Resort Dwellers— LifeMode: L12 American Quilt; Urbanization: U10 Rural I | Married couples, no kids/47.1 | Middle/ \$47,908 | Professional, management, skilled, services | Some college | White | Woodworking and furniture refinishing; target shooting |

| | Household/ Median Age | Median Household Income | Employment | Education | Race/ Ethnicity | Lifestyle |
|---|-------------------------------------|--|---|-------------------------------|----------------------------|---|
| 32. Rustbelt Traditions— LifeMode: L10 Traditional Living; Urbanization: U5 Urban Outskirts I | Mixed/36.1 | Middle/ \$51,436 | Skilled, professional, management, services | HS graduate, some college | White | Buy children and baby products; painting and drawing |
| 33. Midlife Junction— LifeMode: L10 Traditional Living; Urbanization: U8 Suburban Periphery II | Mixed/41.2 | Middle/ \$49,031 | Professional, management, services | Some college | White | Go fishing; attend tennis matches |
| 37. Prairie Living— LifeMode: L11 Factories and Farms; Urbanization: U11 Rural II | Married- couple families/41.3 | Middle | Skilled, farming | HS graduate, some college | White | Own pets; go hunting, birdwatching |
| 41. Crossroads— LifeMode: L12 American Quilt; Urbanization: U9 Small Towns | Family mix/32.1 | Lower middle | Skilled, services | No HS diploma, HS graduate | White | Watch movies on DVD; play volleyball, softball |
| 42. Southern Satellites— LifeMode: L11 Factories and Farms; Urbanization: U11 Rural II | Married- couple families/37.7 | Lower middle/ \$39,758 | Skilled | No HS diploma, HS graduate | White | Shop at Wal-Mart; do gardening, go hunting |
| 46. Rooted Rural— LifeMode: L12 American Quilt; Urbanization: U11 Rural II | Married- couple families/42.2 | Lower middle | Skilled, professional, management, services | No HS diploma, HS graduate | White | Own dog(s); go hunting, fishing, horseback riding |
| 48. Great Expectations— LifeMode: L7 High Hopes; Urbanization: U5 Urban Outskirts I | Mixed/33.2 | Lower middle | Professional, management, skilled, services | HS graduate, some college | White | Painting, drawing; listen to classical music on radio |
| 50. Heartland Communities— LifeMode: L5 Senior Styles; Urbanization: U9 Small Towns | Mixed/42.0 | Lower middle | Skilled, professional, management, services | No HS diploma, HS graduate | White | Work on lawn, gardening, DIY projects; order products from Avon |
| 53. Home Town— LifeMode: L11 Factories and Farms; Urbanization: U8 Suburban Periphery II | Mixed/34.0 | Lower middle | Skilled, services | No HS diploma, HS graduate | White | Play football, go fishing; attend country music performance |
| 56. Rural Bypasses— LifeMode: L11 Factories and Farms; Urbanization: U11 Rural II | Family mix/38.0 | Lower middle | Retired, skilled, services | No HS diploma, HS graduate | White; Black | Attend auto racing events (NASCAR); go hunting |



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