



# Connecting to the Shooting Enthusiast

## Local Digital Sales Solutions

Gun Owner Segmentation Report From The NSSF



# NEEDS-BASED CONSUMER SEGMENTATION REPORT

## PHASE 1 | IDENTIFYING KEY GUN|OWNER CONSUMER SEGMENTS

**One size does not fit all. Gun owners are not the same.** Growing your business depends on knowing who favors your products, who favors your competition and why. By understanding all the segments that represent the firearms and accessories market, businesses can:

- Refine communication and advertising initiatives.
- Improve new product development efforts while better defining their product mix.
- Merchandise their 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 and their preferred styles or features. It is not based on what the customer looks like or how they use their firearms. By understanding why consumers decide to buy a firearm, and the reasons why they selected specific firearms, companies can improve their products 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.

Based on a survey of more than 6,000 U.S. households combined with extensive statistical analysis, this first-ever consumer segmentation study of the U.S. firearms market provides these important insights which move beyond demographics and get into what really motivates people.

This summary represents the tip of an information iceberg. Coming in early 2017, greater details for each segment will be made available. Contact Jim Curcuruto of the NSSF at 203-426-1320 ext. 234 to learn more about these new consumer segmentation resources, including how you can access the NSSF's extensive database to compare your current customers to the overall market to identify new growth opportunities, or to learn more about specific niches of the U.S. firearms and accessories market.



**armalot**  
The Right to Sell Arms

## Hunter



**11%**

OF GUN BUYERS SINCE 2000

As the name implies, the Hunter owns firearms for the purpose of hunting. One of the older and most rural segments, the Hunter is not concerned about concealability, but seeks quality while remaining price sensitive.

## Collector



**8%**

OF GUN BUYERS SINCE 2000

Not necessarily looking for rare or antique firearms, this mostly-male Collector segment wants to possess different types of firearms. Slightly older and wealthier than the other segments, they hunt and shoot, but are not avid participants. Price and versatility are not a concern.

## Social Shooter



**8%**

OF GUN BUYERS SINCE 2000

Diverse in its rural versus suburban spread, the Social Shooter is interested in firearms as a way to spend time with friends. Price is a concern, and versatility is desired in a firearm. After the Hunter segment, this group is more likely to purchase a long gun than other segments.

## Skills Builder



**12%**

OF GUN BUYERS SINCE 2000

Suburban with modest incomes, the Skills Builder is not outdoorsy and is the youngest of all segments. With higher rates of female and minority participation, this segment does not own many firearms but wants to be proficient with the firearms they own. Concealability and low weight reflect their interest in personal protection.

**25%**

FEMALES

**24%**

FEMALES

**25%**

FEMALES

**43%**

FEMALES

### Top Motivators

- |  |  |  |   |
|--|--|--|---|
| <ul style="list-style-type: none"> <li>• Hunting</li> <li>• Protection</li> <li>• Develop shooting skills</li> </ul> | <ul style="list-style-type: none"> <li>• Protection</li> <li>• Add to their firearms collection</li> </ul> | <ul style="list-style-type: none"> <li>• Recreational shooting/fun</li> <li>• Protection</li> <li>• Develop shooting skills</li> </ul> | <ul style="list-style-type: none"> <li>• Protection</li> <li>• To become proficient in its use</li> </ul> |
|--|--|--|---|

### Purchase Drivers

- |  |   |  |   |
|--|---|--|---|
| <ul style="list-style-type: none"> <li>• Price, Versatility</li> <li>• Quality, Reliability, Accuracy, Fit and feel</li> </ul> | <ul style="list-style-type: none"> <li>• Specialized: Specific styles and features</li> </ul> | <ul style="list-style-type: none"> <li>• Price</li> <li>• Versatility</li> </ul> | <ul style="list-style-type: none"> <li>• Concealability, Easy to Handle, Weight</li> <li>• Recommended, Innovative, Used by pros</li> </ul> |
|--|---|--|---|

## Urban Recruits



**4%**

OF GUN BUYERS SINCE 2000

Urban Recruits have lower income, are price conscious and seek versatility in their firearm purchases. Largely urban and suburban, these relatively new owners have the highest proportion of minorities (25%), low rates of target shooting participation, and the highest rates of law enforcement and military background.

## Protector



**26%**

OF GUN BUYERS SINCE 2000

The largest segment, the Protector is typically a family-oriented professional with slightly above average income. They do not describe themselves as outdoorsy, but strongly define themselves as protective of their families and home and know what they want in a firearm when they visit the retailer.

## Guardian Gary



**15%**

OF GUN BUYERS SINCE 2000

Guardian Gary is another distinctly different protection-oriented segment. This all-male segment is a slightly older buyer who is more likely to define himself as tech savvy, analytical and old-fashioned. He is not a hunter but enjoys the outdoors. Personal protection away-from-home is a lesser concern than keeping the homefront safe. Not interested in recreational shooting.

## Debbie Defense



**15%**

OF GUN BUYERS SINCE 2000

An all-female segment, Debbie Defense is interested in personal protection, at- and away-from-home. Young and more ethnically diverse, she enjoys the outdoors. Debbie Defense wants concealability and light weight in a firearm, but is not set on specific product features or brands when she starts shopping for firearms. Recreational shooting is of little interest.

**34%**

FEMALES

**34%**

FEMALES

**0%**

FEMALES

**100%**

FEMALES

## Top Motivators

- |  |   |   |   |
|--|---|---|---|
| <ul style="list-style-type: none"> <li>• Protection</li> <li>• Job or work purposes</li> <li>• To finally own a firearm</li> </ul> | <ul style="list-style-type: none"> <li>• Protection</li> <li>• Develop proficiency</li> <li>• To own before sales are restricted</li> </ul> | <ul style="list-style-type: none"> <li>• Protection</li> <li>• Develop proficiency</li> <li>• To own before sales are restricted</li> </ul> | <ul style="list-style-type: none"> <li>• Protection</li> <li>• Develop proficiency</li> <li>• To own before sales are restricted</li> </ul> |
|--|---|---|---|

## Purchase Drivers

- |  |   |  |  |
|--|---|--|--|
| <ul style="list-style-type: none"> <li>• Concealability, Easy to handle, Weight</li> <li>• Specialized: Specific styles &amp; features</li> <li>• Recommended, Innovative, Used by pros</li> </ul> | <ul style="list-style-type: none"> <li>• Specialized: Specific styles &amp; features</li> </ul> | <ul style="list-style-type: none"> <li>• Price</li> <li>• Versatility</li> </ul> | <ul style="list-style-type: none"> <li>• Concealability, Easy to handle, Weight</li> <li>• Quality, Reliability</li> </ul> |
|--|---|--|--|

# A PLAYING FIELD FOR THE U.S. FIREARMS MARKET



Needs-based consumer segmentation studies reveal the 'playing field', mapping each distinct consumer segment based on their critical needs. The playing field above (graphically presenting U.S. firearms consumers since 2000) shows how big each segment is relative to each other, and which ones are more value sensitive (Hunter, Social Shooter and Guardian Gary), and which ones enter the market knowing the specific features they want in their next purchase (Collector, Protector and Urban Recruits).

Consumer segmentation studies are based on peoples most recent purchases. Their needs and motivations can vary from purchase to purchase. For example, not everyone who hunts belongs to the Hunter segment. But, if their most recent purchase was to satisfy a home protection need, that hunter could fall into the Guardian Gary segment. Consumer segmentation studies are best interpreted as reflecting the overall mix of consumers' motivations and needs as they exist today, and not as a permanent

classification for each individual consumer. Consumer segmentation studies bring clarity to a complex market, and provide a starting point for you to then further explore for new business opportunities, develop a tighter bond with consumers, increase brand loyalty and develop a longer lifetime value. Remember, one size does not fit all and all gun owners do not have the same motivations, wants and needs.

