

ON  HUNT

HUNTING FOR COMMUNITY

What we can learn from hunting's biggest year in decades





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I. HOW THE PANDEMIC BOLSTERED THE HUNTING INDUSTRY



25%

INCREASE IN NEW
HUNTERS IN 2020

The number of hunters in the U.S. has been on the decline for decades.¹ And while it's difficult to calculate exact numbers,² participation has waned since hunting hit its popularity peak in the 1980s.³ That is, until 2020.

In 2020, outdoor recreation saw unprecedented growth. The hunting sector was no exception. States reported an increase in hunter safety class attendees; sales for licenses, firearms, and ammunition all spiked;⁴ and anecdotes of crowded hunting grounds and increased pressure in the field filled our feeds.

According to Southwick Associates, the number of licensed hunters rose 5% in 2020,⁵ and the research firm estimates that this growth was largely fueled by a 25% increase in new hunters. Which is a big deal. Hunting isn't an easy sport to pick up on a whim. Yet hunting's participation growth is imperative to our nation's conservation model and the preservation of many environmental programs.

Naturally, that made us curious at onX. We also saw a 300% increase in active users in early 2020 when the pandemic first began, as folks picked up our app to find ways to escape in nature. So we teamed up with Southwick Associates to ask outdoorsmen and women who tried hunting for the first time in 2020 if the pandemic affected their decision to try out the sport.

These new participants cited that above anything else, COVID afforded them more free time to spend in the field. This may have been the push they needed—the extra free time and encouragement to be outside rather than inside—to dedicate themselves to a new endeavor.

But a global pandemic and having extra time to spend outside isn't something we can rely on to boost our industry's growth and power the future of our conservation and environmental programs. Instead, we want to better understand what motivates new hunters, and what helps them find success in the field.

THE FOLLOWING RESEARCH REPORT REVEALS FIVE TRENDS ABOUT NEW HUNTERS:

01

MEAT IS A
MOTIVATING
FACTOR

02

MENTORSHIP
IS CRITICAL
TO SUCCESS

03

PUBLIC
LANDS ARE
AN ESSENTIAL
RESOURCE

04

TECHNOLOGY
HELPS BRIDGE THE
EXPERIENCE GAP

05

VIDEO CONTENT
FUELS HUNTER
EDUCATION



These findings can tell us a lot about how the sport is evolving and what we can do to encourage others to enjoy one of the oldest traditions known to man (and woman). **After all, nearly two-thirds of experienced hunters we surveyed said they welcome new participants with open arms.** They celebrate the sport's growing popularity, and recognize that new entrants can support conservation. Kudos if you feel the same!

But there's a flip side of that coin. Our research tells us that 60% of new 2020 hunters felt like outsiders when they were learning last year. As an industry and as fellow hunters, we have work to do—especially if we want to ensure the sport's longevity, and what it means to our conservation model as a whole.

HOW DO YOU FEEL ABOUT NEW HUNTERS IN THE FIELD?

I don't care **7%**

I'm glad the sport's popularity is growing **31%**

New hunters can help support conservation **34%**

New hunters can be dangerous **17%**

New hunters put pressure on
hunting resources and game **10%**



onX'S TAKE:

The rising tide of new hunters is a welcome sight for anyone who loves wild places and animals, reversing a long decline and the concerning impacts for conservation that come with decreasing numbers. Welcoming new hunters into the fold and bolstering our communal traditions requires just that: welcoming. Whether it's mentoring someone new to the sport or just a friendly nod at a suddenly slightly more-crowded trailhead, this tide can lift us all.

II. A PROFILE OF THE COUNTRY'S HUNTING POPULATION



17%

OF NEW HUNTERS
IDENTIFIED
AS NON-WHITE

Southwick Associates estimates that there are 15 million⁶ hunters in the U.S., and 66% of those licenses sold are in the South and Midwest. We surveyed 800+ hunters from across the country, and grouped these respondents into three categories based on their experience levels:

Experienced Hunters

Those who have hunted four years or more as an adult. It comes as no surprise that Experienced Hunters are largely Baby Boomers (54%). They have an average of 10 years of hunting experience under their belts, and the vast majority are white males (92%).

New Hunters

Those who started hunting in the last three years as an adult (including 2020 Hunters). A bit younger, 62% are Millennials. They also represent the most ethnically diverse group that we surveyed—17% identified as non-white.

2020 Hunters

Those who hunted for the first time in 2020 as an adult. These participants are most likely to be Millennials as well. Primarily aged 25-44, this group includes significantly more female hunters (22%) compared to Experienced and New Hunter groups.

III. MEAT AS MOTIVATION

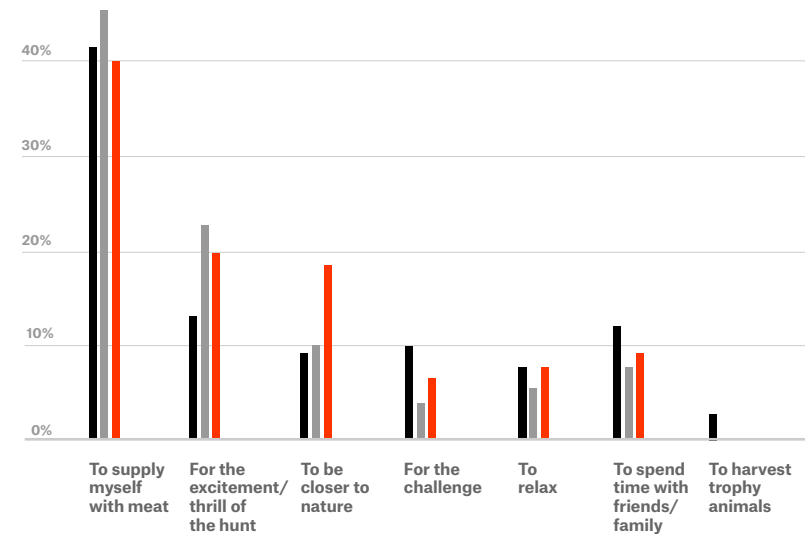
47%

OF NEW HUNTERS
PRIMARILY HUNT
TO HARVEST MEAT

Why do hunters do what they do? No one would say hunting is an easy sport to learn, nor is it a cheap endeavor to embark upon. And we'd be crazy to suggest that a day spent sitting in a tree stand in sub-freezing temps is a walk in the park.

Yet hunting is a tradition enjoyed by millions. And the most common motivation among New Hunters is the chance to harvest meat. In fact, if given the choice of filling the freezer to the brim or going on a once-in-a-lifetime trophy hunt, **two-thirds of New Hunters (and 77% of 2020 Hunters) preferred meat over glory.**

WHAT IS YOUR PRIMARY MOTIVATION TO HUNT?



Experienced Hunters

New Hunters

2020 Hunters

Yet, when we look beyond the harvest, New Hunters are motivated slightly differently than Experienced ones. Having spent less time in the field, New Hunters value the excitement and thrill of the hunt, as well as the opportunity to be closer to nature, more than Experienced Hunters. Experienced Hunters keep coming back for the challenge and the opportunity to spend time with friends and family—both of which they value more than New Hunters.

2x

NEW HUNTERS
IN THE WEST
ARE 2X MORE
INTERESTED IN
GETTING CLOSER
TO NATURE

2x

MID-ATLANTIC
NEW HUNTERS
ARE 2X MORE
INTERESTED IN
SPENDING TIME
WITH FRIENDS
AND FAMILY

54%

OF GEN ZERS
WERE INTERESTED
IN A TROPHY
HUNT, SHOWING
MORE INTEREST
THAN ANY OTHER
GENERATION

New Hunters see the landscape with fresh eyes, and are open to all its possibilities. Serving up self-reliance and sustainable food sources—with a side of excitement and a deeper connection to the outdoors—is an ideal way to entice New Hunters.



onX'S TAKE:

Meat matters, and an uptick in awareness about where protein is procured (anecdotally, at least) among younger generations could be a powerful driver to make 2020's growth more than a blip. Understanding how your meat made it from the mountains to your family's table is a story and an adventure that continues to resonate with hunters of all experience levels. Plus, the appeal of self-reliance never goes out of style.

IV. THE IMPORTANCE OF MENTORSHIP

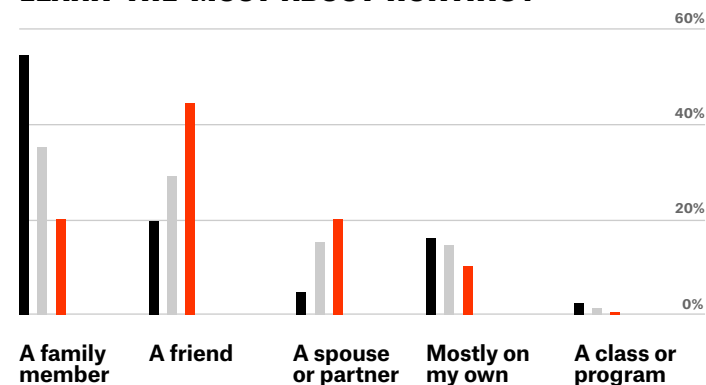
2/3

OF NEW HUNTERS
WERE INTRODUCED
TO THE SPORT BY
FRIENDS OR FAMILY
LATER IN LIFE

Think back to when you learned to hunt. Did you accompany someone on early morning treks in the woods or out to the blind? If you fall into the Experienced Hunter category, chances are you grew up in a hunting family and honed your skills and interest with your parent, grandparent, or sibling as a tutor. But those experiences are on the decline, and younger hunters (who make up the majority of New Hunters) are less likely to grow up with family members as mentors.⁷

Instead of learning from their families, two-thirds of New Hunters were introduced to the sport by their friends or spouses/partners later in life. In fact, New Hunter Millennials learned primarily from their friends, and their entry to hunting was a social activity.

FROM WHOM OR WHERE DID YOU LEARN THE MOST ABOUT HUNTING?



Experienced Hunters

New Hunters

2020 Hunters



**HAVING A MENTOR WAS THE GREATEST
IMPACT ON THE SEASON'S SUCCESS**

15%

Experienced Hunters

44%

New Hunters

47%

2020 Hunters

These sources of expertise are important because mentorship has a huge impact on a younger hunters' success rate. **When asked to cite what had the biggest influence on their success last season, the most common response among New and 2020 Hunters (44% and 47%) was mentorship.**

But what happens if new participants don't have family members or friends as resources? Many look elsewhere. Two-thirds of 2020 Hunters went with a guide at least once last season, which increased their success rates by 32% (compared to those who didn't hire guides). But it's unclear whether these New Hunters are seeking increased odds or looking for guidance in lieu of friends or family who might offer lifelong camaraderie in the field. This social aspect is one that is valued more by Experienced Hunters, as we saw above, and it may help fuel their passion for the sport year after year.



onX'S TAKE:

Adult-onset hunters may lack the generational ties to hunting, but they bring the enthusiasm of a seeker that those of us who grew up hunting with strong influences have to cultivate in other ways. Point the way, share a tip, or recommend a trusted guide—these New Hunters wanted this badly enough to find it, let's give them some waypoints to follow.

V. RELIANCE ON PUBLIC LANDS



53%

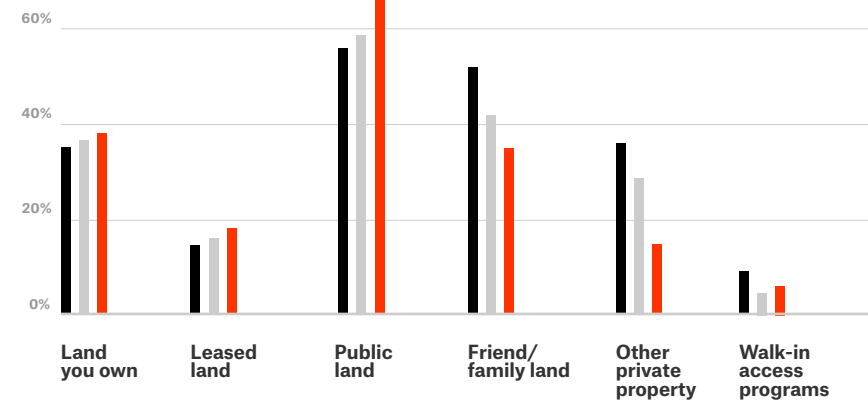
OF 2020 HUNTERS
RELIED ON PUBLIC
LANDS FOR OVER
70% OF THEIR
HUNTS LAST YEAR

Not every hunter has access to family owned property to hunt. Nor are they always able to join hunting clubs or lease private land. This is especially true among younger hunters, who are typically born outside of hunting families with those traditions established.

Fortunately, in the U.S. we have roughly 443 million acres of huntable public land in the lower 48 states,⁸ providing unparalleled outdoor opportunities. More than half (53%) of 2020 Hunters relied on these publicly-owned spaces for over 70% of their hunts last year, and 30% of New Hunter Millennials hunted exclusively on public lands.

Yet it's important to note that access to these places is not equal across regions. **Given land-ownership patterns, 89% of public hunting opportunities exist west of the Mississippi River.⁹ This is important because 70% of New Hunters surveyed live in the South and Midwest.**

WHAT TYPE(S) OF LAND DID YOU HUNT ON DURING THE 2020 SEASON?



Experienced Hunters

New Hunters

2020 Hunters

So while many relied on public lands, others looked for alternative solutions. **Gen Zers, for example, were more likely to ask permission to hunt private land than any other generation. As hunters gained experience, they were three times more likely to hunt a privately owned walk-in program open to the public.** But these programs aren't always widely publicized, and we've heard anecdotally that their rules and regulations still confuse veteran hunters. This could be evidenced by the fact that only 8% of all hunters took advantage of walk-in programs. Yet, these programs add roughly 30.6 million acres of huntable property¹⁰ to the playing field, and exist across all regions. They appear to be an underutilized resource that, in addition to public lands, could offer both new and veteran hunters alike alternative places to hone their skills.



49%

OF ALL HUNTERS IN THE WEST DID 100% OF THEIR HUNTING ON PUBLIC LANDS

MILLENNIALS HUNTED ON PUBLIC LANDS MORE THAN ANY OTHER GENERATION



onX'S TAKE:

Huntable land is essential to the sport. But it isn't always equally accessible or easy to understand. As we'll see below, many New Hunters turn to technology to help clarify these opportunities. Understanding and respecting public access has the potential to unlock new opportunities that fuel New Hunters in ways they may not have realized. As fellow sportsmen and women, we should avoid taking our public lands for granted and teach new participants how to be good stewards of these shared resources. We can also work to commend private landowners who open up their property to the public, and in doing so offer more opportunities to a growing community.

VI. TECHNOLOGY HELPS BRIDGE THE EXPERIENCE GAP

41%

OF NEW HUNTERS
WOULD REACH
FOR A HUNTING-
SPECIFIC APP OR
GPS DEVICE IF
THEY COULD ONLY
BRING ONE TOOL
WITH THEM

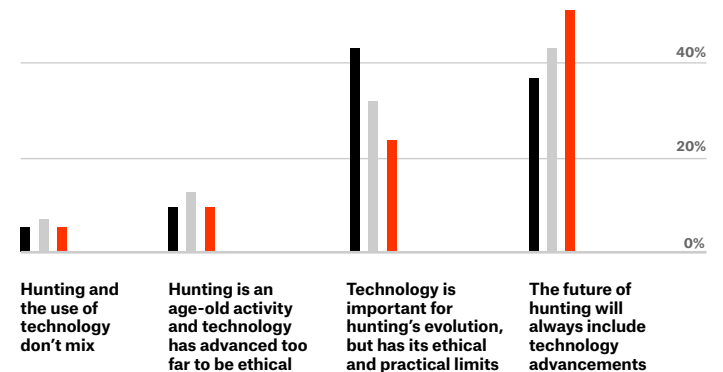


Technology and its role in an age-old pastime like hunting is an oft-debated topic, especially when it comes to conversations around fair chase. Yet, the newer the hunter, the more open he or she is to leveraging technology to make the most of the hunting experience.

When we look at tools used during the hunt, younger participants have adopted tech-based items more readily than their older counterparts. In fact, the most popular tool (analog or digital) in the 2020 Hunter's quiver was a hunting-specific app. Yet that reliance on technology wanes with experience or age.

If hunters could only bring one tool with them for the rest of their hunts, we see a clear delineation between New Hunters who rely on tech (41% chose either a hunting-specific app or GPS device) and Experienced Hunters who rely on their eyes (the most popular tool they'd opt for are optics, like binoculars and spotting scopes.)

WHICH STATEMENT BEST REPRESENTS HOW YOU FEEL ABOUT HUNTING AND TECHNOLOGY IN GENERAL?



Experienced Hunters

New Hunters

2020 Hunters

TOP 3 TOOLS USED BY HUNTERS

Experienced Hunters

- 1 Optics
- 2 Weather Forecasts
- 3 Trail Cameras

New Hunters

- 1 Optics
- 2 Trail Cameras
- 3 GPS Device

2020 Hunters

- 1 Hunting-Specific Apps
- 2 GPS Device
- 3 Compass

It isn't surprising that New Hunters are 84% more likely to attribute their success in the field to technology (like apps and field navigation) than Experienced Hunters. This may indicate that technology helps them bridge the experience gap, arming them with more information as they climb a steep learning curve.



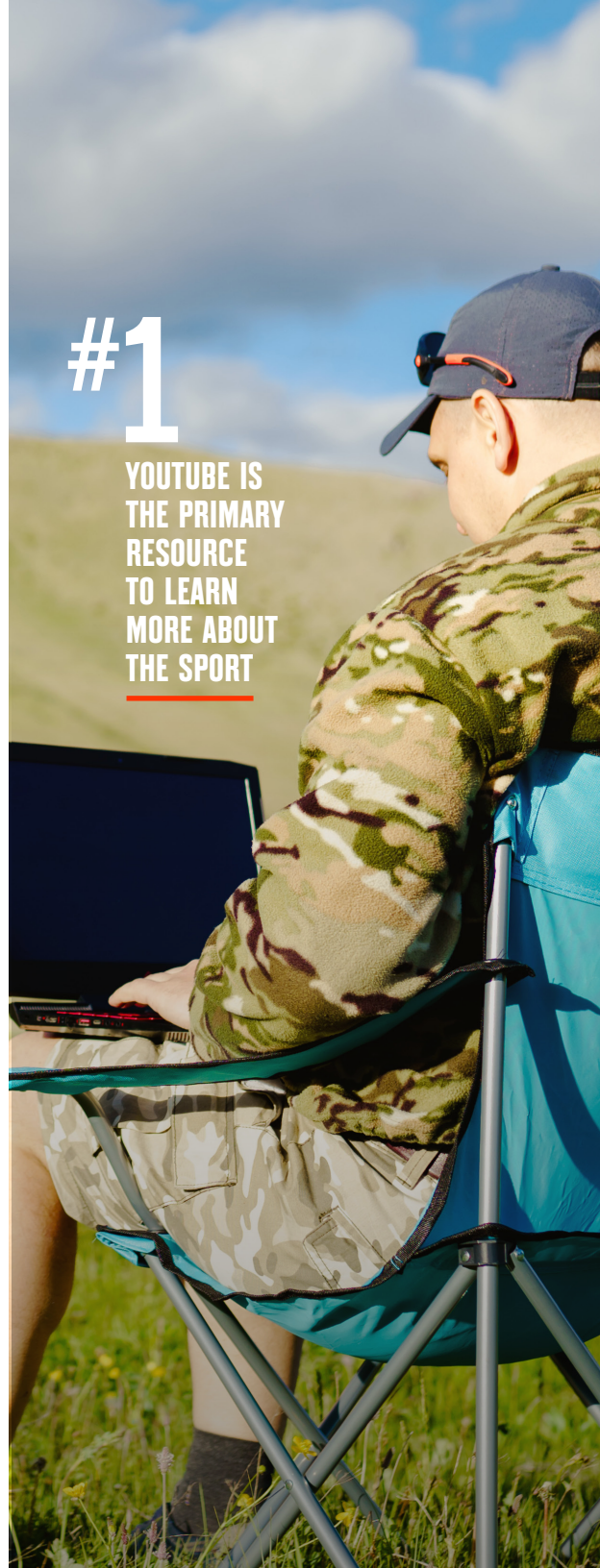
onX'S TAKE:

We're not unbiased here, but what's clear is that everyone is looking for greater degrees of clarity in the field. Seeing the land in maximum sharpness—on a cell phone screen or through a spotting scope—will always dominate the top of the toolkit as hunters new and experienced look for an edge.

VII. VIDEO CONTENT FUELS HUNTER EDUCATION

#1

YOUTUBE IS
THE PRIMARY
RESOURCE
TO LEARN
MORE ABOUT
THE SPORT



When citing the factors that impacted their success, New Hunters were quick to rank mentorship as having the biggest influence, as we saw above. But coming in as a close second was spending as much time as possible in the field.

Having boots on the ground creates the immersive experiences needed to master skills imperative to hunting—such as honing in on stalking skills and getting close enough to game (the number-one skill that the majority of New and 2020 Hunters would like to improve).

Perhaps, in a post-pandemic world, New Hunters will continue to carve out long periods of time in the outdoors to facilitate these important learning experiences. But if there's one thing that we can rely on, it's that time away from our jobs and other responsibilities isn't always a given. Not every hunter will be able to take multiple weeks or weekends off to scout, practice, and perfect the sport of hunting.

So if a first-hand experience isn't possible, the next-best experience is watching someone else do it. And with the surge in popularity of hunting shows and influencer content in recent years, it's no wonder that YouTube ranks as the #1 resource that hunters turn to in order to learn more about the sport.

TOP 3 ITEMS THAT IMPACTED HUNTER SUCCESS

Experienced Hunters

- 1 Spending as Much Time in the Field as Possible
- 2 Quality of the Hunting Property
- 3 Pre-Season Field Scouting

New and 2020 Hunters

- 1 Mentorship
- 2 Spending as Much Time in the Field as Possible
- 3 Instructional Videos

TOP 5 HUNTING RESOURCES FOR CONTINUED LEARNING

Experienced Hunters

- 1 YouTube
- 2 Magazines
- 3 TV
- 4 State Regs
- 5 Online Forums

New and 2020 Hunters

- 1 YouTube
- 2 Social Media
- 3 TV
- 4 Magazines
- 5 Online Forums

As you might expect, YouTube's popularity is highest among younger and newer hunters. **Two-thirds of 2020 Hunters cited YouTube as their #1 source for hunting information.**

The only outliers to this trend were New Hunters in the Northeast. These outdoorsmen and women prefer magazines, blogs, books, and online forums over the video streaming platform to learn more about hunting.



onX'S TAKE:

The COVID-influenced 2020 season might've offered a one-time-only bump in opportunity to invest more time scouting in the field, but there's always time to fall down a YouTube rabbit hole. Whether it's instruction or entertainment on-screen, a sense of community in the comments, or simply a little background noise that might offer some tips via osmosis, online video content is a crowd pleaser.

VIII. A NEWFOUND IDENTITY

82%

OF ALL HUNTERS BROUGHT
HOME MEAT TO FILL
THEIR FREEZERS IN 2020

After learning more about New Hunters' motivations, behaviors, and preferences, we were curious about whether they were successful in their pursuits last season. Did their desire to harvest sustainable protein, their reliance on mentorship and public lands, their preference for technology over analog tools, and thirst for video content pan out?

And the answer is an overwhelming "yes." Among first-time hunters, over two-thirds harvested an animal last year. New Hunters, with slightly more seasons under their belts, were 73% successful. And 85% of Experienced Hunters brought home meat to fill their freezers.

PERCENTAGE OF SUCCESSFUL HUNTERS IN THE 2020 SEASON

85%

Experienced Hunters

73%

New Hunters

68%

2020 Hunters



PERCENTAGE OF HUNTERS WHO PLAN TO HUNT IN THE 2021 SEASON

99%

Experienced Hunters

93%

New Hunters

94%

2020 Hunters

Yet regardless of whether they were successful or not, nearly all hunters we surveyed plan to head out again this season. For many, hunting has already become part of their identity and lifestyle.

When asked if hunting is just a hobby or part of their identity and how they go about life, 63% of New Hunters responded with an increased connection to the sport, compared to Experienced Hunters at 56%.

And generationally, regardless of experience level, younger hunters tend to identify with the sport more—which could indicate a long-term boon to the hunting industry.

Lastly, if you're an Experienced Hunter and wondering what impact more hunters will have on the sport as you know it, we get it. We're a group of lifelong hunters too. But despite the anecdotes of crowded hunting grounds and decreased odds¹¹ that circulated during the 2020 hunting season, these perceived negative impacts of a growing sport were actually felt two times more among New Hunters than Experienced Hunters. As a seasoned sportsman or woman, you have the edge of extra years in the field.

You know where to go, how to find new zones, what equipment you need, and how to increase your odds of success.



onX'S TAKE:

It's impossible to know the long term impacts of COVID on society, but the pandemic has provided a shot in the arm to outdoor pursuits from walks in the woods to waiting for whitetail. Participation numbers are at generational highs, gear inventories are at all-time lows, and it seems like everyone is waiting to see if this back-to-nature craze sticks. We hope it does. New Hunters bring a fresh perspective and enthusiasm to an age-old tradition. Traditionalists bring reverence and experience only earned by slowly accumulated days in the field. The great hunting bump of 2020 could offer both groups a once-in-a-lifetime chance to strengthen the ties that bind generations of hunters together, whether you learned as a child or just finished Hunter Education as an adult. We're all looking for a way to see a little more clearly—and whether that's on a shiny smartphone or through a weathered spotting scope, the future of hunting has never looked brighter.



RESOURCES

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PHOTO CREDIT

1. PN Wild 2. Stone Glacier 3. PN Wild 4. Kyle Mlynar 5. 24.7 Hunt 6. Josh Combs 7. PN Wild 8. PN Wild 9. Mossy Oak 10. Mossy Oak Blades 11. Nick Thies 12. Identical Draw 13. Jana Waller 15. Austin Lemieux 16. PN Wild 17. Jason Matzinger 18. Mossy Oak