

TOURISM
SASKATCHEWAN

U.S.
HUNTING
STUDY

Market Summary





KEY FINDINGS & RECOMMENDATIONS | WHO ARE HUNTERS AND WHAT DO THEY VALUE?

Being ethical and respecting the environment is of utmost importance to hunters of all ages. Focusing on social connections among older hunters, and decompressing and escaping the daily life among younger hunters, will increase the appeal of the message.

Past license hunters tend to skew older (65% are age 55 and over) and have higher incomes. Connect with their strong values of being an ethical hunter, as well as a conservationist, and highlight the social connection aspect of hunting. When it comes to outdoor activities, they're most drawn to hunting both large and small game, as well as fishing. They typically hunt waterfowl, upland game birds and white-tailed deer.

Potential hunters tend to skew younger (61% are between the ages of 25 and 44) and have lower incomes. Like past license hunters, they also value being an ethical hunter, but align that with their strong desire to be able to experience nature, and learn about the animals and the environment, as well as decompressing and escaping their stressful daily lives. Highlight the wide variety of species available to hunt in Saskatchewan, especially white-tailed deer, waterfowl and moose, focusing on the challenge of the hunt, size of the animal and bag limit.

U.S. Hunters

vs.

Past Saskatchewan Hunters

Skew much younger, under 55, and generally have lower disposable incomes. This is partially due to their age and life situation – many potential hunters still have younger children, are pulled by more responsibilities in life (in money and time commitment), and hunt fewer days each year.

Skew older, mainly 60 and older. Due to their age, they tend to have higher incomes and larger families – most have grown children and grandchildren; and have more time to go on hunting trips multiple times a year. Their main barriers are health and finding others to go with them.





KEY FINDINGS & RECOMMENDATIONS | EXPECTATIONS WHEN PLANNING AND GOING ON A HUNTING TRIP

Ensuring the message shows the concrete value added by outfitters and what they offer can offset some of negative perceptions of mandatory outfitters. Showing Saskatchewan as a well-rounded destination can increase appeal to younger hunters, who enjoy diversity and have family commitments.

Highlight the advantages and exclusive benefits of hunting with an outfitter for all hunters, especially among past license holders, who prefer taking a fully independent DIY trip or an exclusively hunting trip. Address the barriers to using an outfitter by showing the value that outfitters provide (to justify the costs); dispelling the perception that hunting is not as fun/challenging with an outfitter; and providing the resources for hunters to easily find a good outfitter (information, recent pictures, reviews, resources provided, etc.).

Showcase the different activities that are available for potential hunters while hunting in Saskatchewan, as many prefer taking hunting trips combined with other activities such as fishing or angling, hiking, and other outdoor activities, as well as trips that could engage the entire family, since they have limited time and money and may want to bring their families.



TOURISM SASKATCHEWAN | US HUNTING RESEARCH

KEY FINDINGS & RECOMMENDATIONS | HOW TO ALIGN AND STRENGTHEN PERCEPTIONS OF HUNTING IN SASKATCHEWAN

Highlight Saskatchewan's strengths (healthy population, quality game, easy to get the desired animal, etc.), but without neglecting educating those who know nothing about Saskatchewan (distance, types of game available, cost, laws and regulations, etc.).

For past license holders, Saskatchewan's strengths are: being a destination with a healthy population of the game they are hunting, beautiful nature, having the type of game they're looking to hunt, and being able to bring their own gun. Saskatchewan stands out against other destinations by being easy to get the tag they want, and providing easy access to the information needed. There's an opportunity to align perceptions that outfitters are hardworking and well-prepared, passionate about the hunt, and are experts at what they do.

For potential hunters, focus on upper funnel marketing initiatives and providing more general information about the destination: information can be accessed easily, hunters are able to bring their own equipment, tags/licenses are easily obtained, and cost is not prohibitive. Among those with no experience hunting in Saskatchewan, there's a general lack of knowledge about the destination that becomes a barrier for consideration. Bridging that knowledge gap will put Saskatchewan among hunters' competitive set by showing them what is unique about Saskatchewan, and dispelling myths about hunting in Canada. Address barriers like travel distance (maps, flight/drive times), types of game available, experiences available, etc.



TOURISM SASKATCHEWAN | US HUNTING RESEARCH

KEY FINDINGS & RECOMMENDATIONS | HOW TO TARGET POTENTIAL HUNTERS AND INCREASE AWARENESS OF SASKATCHEWAN

Saskatchewan enjoys moderate awareness and impressions among U.S. hunters, but when provided with promotional material, positive impressions increase significantly. Ensuring exposure to content is key to increasing consideration (as proven by the very positive impressions among license holders, who have experienced Saskatchewan).

Saskatchewan enjoys moderate awareness among potential hunters (1 in 3 aware) and is one of the top provinces that they're interested in visiting (66%), showing there is potential to attract U.S. hunters; and highlighting the importance of ensuring that they have the information they need to increase consideration.

In terms of overall impressions, previous experiences and awareness of Saskatchewan aid in strengthening overall impressions. **Encourage past hunters to share and discuss their experiences** in order to build more positive overall impressions for potential hunters. Continue to provide high-quality information for hunters through **maps and websites** (tourism and agencies/outfitters) for hunters to use during their planning process. **Hunting shows on TV and YouTube**, as well as **outdoor/sporting shows**, can be leveraged to increase awareness among hunters, as those are the top media platforms of inspiration for hunters. **Providing more information specifically on costs and value** can also decrease their barriers to hunting in Saskatchewan.

	U.S. Hunters	SK License Holders
In a nutshell	Younger, avid hunters who take multiple short, drivable hunting trips. Cost, time and proximity are barriers, especially for those with young families; and there is interest in partaking in non-hunting activities. Out-of-country trips are typically on the DREAM list.	Older, avid and experienced hunters who hunt more frequently during the year; and have higher incomes and more disposable income. They consider themselves conservationists, and look forward to the bonding opportunities hunting trips provide.
Interest in Saskatchewan for Hunting	Interested and open, especially after seeing SK content and hunting assets.	Very favourable impressions of SK after previous visits, and high interest in returning (many have already booked a return trip).
What do they need to SEE?	Where Saskatchewan is and what it has to offer: maps, travel, distance, examples of species (including success rates), other activities to experience, information related to bringing equipment and guns, exporting meat, tag limit, seasonality, etc.	Align, enhance and reframe perceptions of outfitters – barriers perceived are high cost, hard to find a good one, and takes the fun/challenge out of the hunt. Tout the benefits of outfitters and how they elevate the overall experience (i.e., enable ethical hunting and conservation, and facilitate connection to nature, the land, animals, etc.).
What do they need to HEAR?	Elevate the softer elements of the experience: experience nature, create connections, etc. However, tag limit, trophy/large size, unique species are key motivating factors. Demonstrate that SK is accessible.	Saskatchewan is open for hunting. Continue to focus on the opportunity for bonding, the thrill of the hunt, and the game available.
Priority for recovery	Open, but more barriers to overcome, including getting on their radar, differentiating Saskatchewan, education about the experience, terrain, wildlife available. Slower expected uptake for mass transportation, travelling outside of the country, post-COVID-19.	Key – more open to travel, more likely to take trips outside the country), and already know and have experienced Saskatchewan.
Bottom Line	Raise the profile of Saskatchewan, differentiate it as a hunting destination.	Keep them interested, engaged and wanting to return.

	U.S. Hunters	SK License Holders
Who they are	Skew younger (61% <45 years) Balanced gender (41% female)	Skew older (66%, 55+) Skew male (99%)
Hunting mindsets	Very much driven by the experience and being in nature, but much more likely to be driven by the thrill of the hunt, animal size, hitting bag limit, etc.	Conservationists and appreciate the social aspect of hunting, legacy and mentorship, creating connections (to the land, the animals, people)
Hunting behaviour P2Y	Shorter, “easier” trips: 14 hunting days, 9 out-of-state trips	More days hunting, fewer trips: 32 hunting days, 7 out-of-state trips
Likelihood to take an out-of-state hunting trip N2Y	Slightly more cautious than past license holders (48% will take an out-of-state hunting trip in the next 2 years), more likely to avoid mass transportation and avoid going to another country	Enthusiastic to return once the restrictions are lifted (80% will take an out-of-state hunting trip in next 2 years)
Hunting preferences	Hunting trips combined with other activities (58%)	Exclusively hunting trips (60%), fully intendent DIY trip (60%)
Top hunting destinations they’re interested in visiting	Alberta (68%), Alaska (67%), Saskatchewan (66%), Manitoba (66%)	Saskatchewan (18% interested, but 91% visited), Alberta (65%), Alaska (59%), Manitoba (51%)
Perceptions of outfitters	Too expensive (50%), good ones are hard to find (41%), hunting is not as challenging with an outfitter (27%)	Too expensive (44%), hunting is not as fun with an outfitter (22%), good ones are hard to find (22%)
Perceptions of Saskatchewan	Positive (56% top 2 box rating) – healthy population of desired game, beautiful nature, and more positive associations with outfitters in Saskatchewan compared to past license holders (increases to 89% after viewing promotional material)	Highly positive (98% top 2 box rating) – healthy population of desired game, can bring their own equipment, tags/license easily accessible

QUALITATIVE INSIGHTS |
Values that define them as
hunters



QUALITATIVE INSIGHTS | Tradition, thrill and connection

Hunting is often rooted in tradition, whether they first hunted as children, with their fathers, siblings, uncles and family friends; or if it's their first hunt as an adult. In both situations, there is an instinctive need to carry on traditions and create new ones for themselves and their family. Key to these traditions include:

CONNECTION

- An unquestionable connection to nature, animals and passion for the outdoors
- Connecting with others, bonding, shared experiences
- Connecting to the past, present, future
- Connection to your food
- Connection to oneself and a higher power

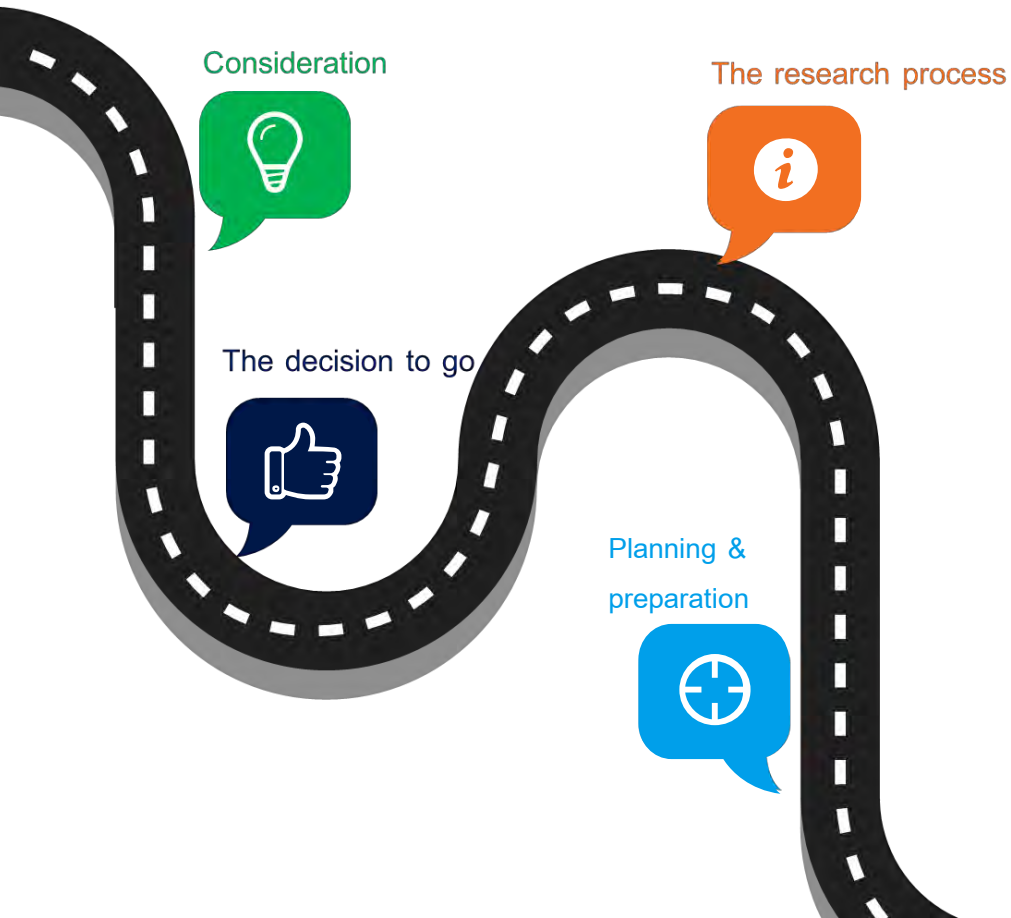
THRILL & PERSONAL CHALLENGE

- Thrill of the hunt
- Preparation, research and planning
- Pride
- Skills development
- Ability to provide

ESCAPING

- Disconnecting
- Breaking routine





QUALITATIVE INSIGHTS | Path to purchase. Hunters are often thinking about, and preparing for, their next hunting trip. But because they have a checklist of must-do destinations, they're actively on the lookout for new opportunities and new information; and often think about "big" trips very far in advance.

There are two types of hunting trips: regular trips and one-off /occasional trips, and the path is different for each. Below, we detail the typical path for one-off/occasional trips – where an out-of-country typically falls.

Consideration: There is no one moment in time. Any time is a good time to engage, but typically trips are considered around open hunting season. On the dream list, a last-minute promotion, a friend that is going, talking to someone at an outdoor show, an annual trip always in the planning, etc.

The decision to go: Before deciding, hunters need assurance that the destination has the game they're interested in, unique/different species from their usual, that the ecosystem is healthy, and that they can get the tag they want. Size of animals and success rates are must-haves. Proximity to home and cost are also key considerations, as trips out-of-state/country require a good degree of planning in advance.

The research process: Most start with Google and go from there. There is a multitude of resources used: FB groups, Podcasts, YouTube hunting channels, TV shows (for inspiration), destination sites, hunting associations and organizations.

Planning and preparation: Apps such as onX, Google Earth for terrain, weather patterns, wind, animal behaviours (including recon trips to scout the area and set up cameras), rural municipality maps, calling local outfitters and references, purchasing the equipment needed, physical and mental preparation for hard terrains, coordinating with friends.

Trip planning process and the ideal information

- Clear process and costs laid out on the website for different game (for residents and non-residents, transparency about preference points systems/lotteries or draws, etc.).
- Interactive map/hunting atlas that has migration routes, holding areas for certain animals, holding areas for different seasons, numbers of licenses or tags, animals harvested recently.
- A free resource that can do probability calculations of the different animals (probability of drawing the tag and success ratio of the hunt).

“I guess, you know, some of the stuff that I've been, because I've been looking into guides to figure out whether we're going to Texas or whether we're going to North Dakota and who we're going to go with. Once we make that decision, the biggest thing that I look for is social media presence. The things I'm looking at on that are – are they posting a photo or a video every two or three days? Show it. Hey, we're on the birds, you know, are they apt to provide lodging, stuff like that? And, obviously, reviews!” – Male, 25-34 years, Wisconsin



Outfitters should be knowledgeable, and provide up-to-date information and a turnkey experience.

The ideal outfitter for hunters are those who:

- **Provide a seamless “turnkey” experience:** Hunters who are short on time and travelling long distances are often willing to pay more for outfitters, who handle all the logistics so that they can just show up and hunt.
- **Prepared and knowledgeable:** Hunters appreciate when their outfitter is not only knowledgeable about the game and terrain, but also prepared for the hunt (e.g., they don't need to make any last-minute trips to the store, they've already spent months setting up bait and tracking animal patterns).
- **Provide up-to-date, clear information:** This includes information on packages, pricing (especially tax regulations), photos of recent hunts, success rate, night camera shots.
- **Passionate about hunting:** When the outfitter is equally passionate about the hunt rather than just seeing it as a job to get done, hunters really feel the difference – and it really enhances their experience.
- **References by phone readily available:** Many hunters still rely strongly on word-of-mouth recommendations when finding an outfitter, so it's important that outfitters have good references readily available. Many hunters also appreciate being able to have a phone conversation with the outfitters, to get to know them better before deciding if it's the right fit.





HUNTING IN SASKATCHEWAN

SASKATCHEWAN HAS THE TYPE OF GAME HUNTERS ARE LOOKING FOR AND THEY FEEL THEY CAN HARVEST QUALITY MEAT, PARTICULARLY FOR PAST LICENSE HOLDERS. HOWEVER, AMONG U.S. HUNTERS, THERE'S AN OPPORTUNITY TO ALIGN WHAT THEY KNOW ABOUT THE PROVINCE WITH WHAT THEY'RE LOOKING FOR (LACK OF KNOWLEDGE IS A KEY BARRIER TO CONSIDERING THE DESTINATION).