

Responsive Management™



SURVEY RESULTS OF TRADE SHOW ATTENDEES: SINGLE-CHANNEL RETAILERS

Conducted for the Archery Trade Association

by Responsive Management

2011

SURVEY RESULTS OF TRADE SHOW ATTENDEES: SINGLE-CHANNEL RETAILERS

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TABLE OF CONTENTS

Introduction and Methodology	1
Use of Telephones for the Survey	1
Questionnaire Design	1
Telephone Interviewing Facilities	1
Interviewing Dates and Times.....	2
Telephone Survey Data Collection and Quality Control.....	2
Data Analysis.....	2
Notes on Reading the Report.....	2
Preferences for ATA Trade Show Dates and Days	4
Preferences Regarding Registering for the Trade Shows and Being Contacted.....	10
Buying Groups and Purchasing Through a Distributor	14
Attendance at Previous ATA Trade Shows and Likelihood to Attend Future ATA Trade Shows.....	16
Crosstabulations of Results.....	18
Preferences for ATA Trade Show Dates and Days	19
Preferences Regarding Registering for the Trade Shows and Being Contacted	39
Buying Groups and Purchasing Through a Distributor	87
Attendance at Previous ATA Trade Shows and Likelihood to Attend Future ATA Trade Shows	105
About Responsive Management	145

INTRODUCTION AND METHODOLOGY

This study was conducted for the Archery Trade Association (ATA) to determine Trade Show attendees' opinions and preferences regarding various aspects of the Trade Shows. The study entailed a telephone survey of single-channel retailers from a database of Trade Show attendees and was part of an overall project to update the database. While providing updated information, attendees were asked to participate in a short survey. Note that the attendees in this study were owners and/or managers of *single-channel retailers*; all multi-channel retailers (i.e., chain or franchise stores) were not included in the study. Hereinafter, the respondents to the survey are referred to as "Trade Show attendees"; it is understood that this reference in this report applies only to *single-channel retailers*. Specific aspects of the survey research methodology are discussed below.

USE OF TELEPHONES FOR THE SURVEY

For the survey, telephones were selected as the preferred sampling medium because of the immediacy of one-on-one interaction when the database was being updated. Note that telephone surveys, relative to mail or Internet surveys, allow for more scientific sampling and data collection, provide higher quality data, obtain higher response rates, are more timely, and are more cost-effective. Telephone surveys also have fewer negative effects on the environment than do mail surveys because of reduced use of paper and reduced energy consumption for delivering and returning the questionnaires.

QUESTIONNAIRE DESIGN

The telephone survey questionnaire was developed cooperatively by Responsive Management and the ATA. Responsive Management conducted non-live (i.e., not on actual Trade Show attendees in the database) pre-tests of the questionnaire to ensure proper wording, flow, and logic in the survey.

TELEPHONE INTERVIEWING FACILITIES

A central data collection site at the Responsive Management office allowed for rigorous quality control over the survey interviews and the updating of the database. Responsive Management maintains its own in-house telephone interviewing and data collection facilities. These facilities

are staffed by interviewers with experience conducting computer-assisted telephone interviews on the subjects of outdoor recreation and natural resources.

INTERVIEWING DATES AND TIMES

Telephone surveying times were Monday through Friday from 9:00 a.m. to 9:00 p.m., and Saturday from noon to 5:00 p.m., local time. Callbacks were made by appointment at the convenience of the Trade Show attendees. The survey was conducted in April 2011.

TELEPHONE SURVEY DATA COLLECTION AND QUALITY CONTROL

The software used for the survey and data collection was Questionnaire Programming Language (QPL). The survey questionnaire was programmed so that QPL automatically branched in the survey where necessary. The survey questionnaire contained error checkers and computation statements to ensure that the proper data were entered. The Survey Center Managers and statisticians checked each completed survey to ensure clarity and completeness.

DATA ANALYSIS

The analysis of survey data was performed using Statistical Package for the Social Sciences as well as proprietary software developed by Responsive Management.

NOTES ON READING THE REPORT

Some questions allowed only a single response, while other questions allowed respondents to give more than one response or choose all that apply. Those questions that allowed more than a single response are indicated on the graphs with the label, "Multiple Responses Allowed."

Most graphs show results rounded to the nearest integer; however, all data are stored in decimal format, and all calculations are performed on unrounded numbers. For this reason, some results may not sum to exactly 100% because of this rounding on the graphs. Additionally, rounding may cause apparent discrepancies of 1 percentage point between the graphs and the reported results of combined responses (e.g., when "very likely" and "somewhat likely" are summed to determine the total percentage being "likely").

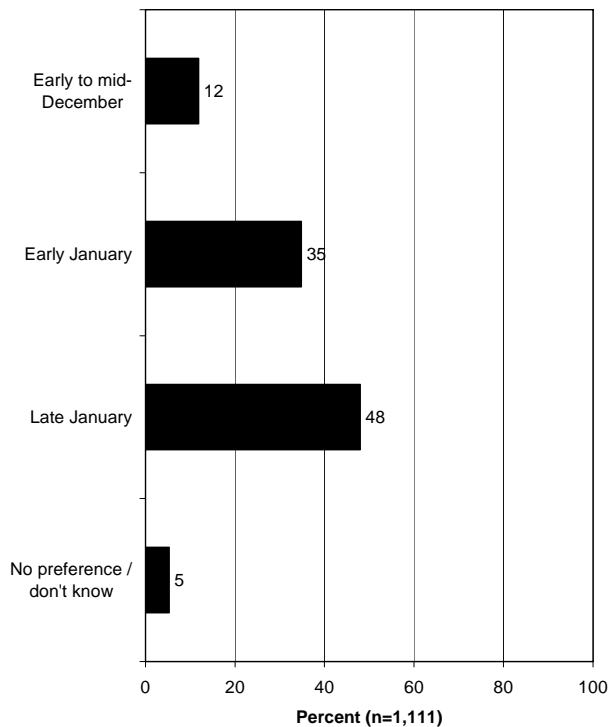
Following the main body of the report, crosstabulations are presented. For ease of reading, the overall results for each question are presented, followed by the crosstabulations. There are eight crosstabulations, and they are presented in the same order for each question:

- **Show attendance, by past 2 years:** This crosstabulation breaks down respondents into:
 - Those who attended the 2010 show in Columbus
 - Those who attended the 2011 show in Indianapolis
 - Those who attended both the 2010 and the 2011 shows
- **Show attendance, by city:** This crosstabulation breaks down respondents into:
 - Those who attended the Columbus show
 - Those who attended one or more Indianapolis shows
 - Those who attended the Columbus show and at least one Indianapolis show
 - All others who did not meet any of the above three conditions
- **Show attendance, by number of shows attended:** This crosstabulation breaks down respondents into:
 - Attended none of the shows since 2003
 - Attended 1-3 shows since 2003
 - Attended 4-6 shows since 2003
 - Attended 7-9 shows since 2003
- **Region:**
 - Midwest / Northeast region
 - South region
 - West region
- **State:** This crosstabulation was done of the top six states, ranked by the number of stores in the database in each state, and then states 7 through 12 in the ranking:
 - **Top Six States**
 - Illinois
 - Indiana
 - Michigan
 - Ohio
 - Pennsylvania
 - Wisconsin
 - **Next Six States**
 - Georgia
 - Kentucky
 - Minnesota
 - Missouri
 - New York
 - West Virginia
- **Membership in buying clubs:** This crosstabulation breaks down respondents according to membership:
 - Belong to ARRO (but not NABA)
 - Belong to NABA (but not ARRO)
 - Belong to both ARRO and NABA
 - Belong to any other buying group other than ARRO or NABA
 - Do not belong to any buying group
- **Membership in buying clubs:** This crosstabulation is like the one above, except it consolidates ARRO and NABA membership:
 - Belong to ARRO and/or NABA
 - Belong to any other buying group other than ARRO or NABA
 - Do not belong to any buying group
- **Annual sales:** This crosstabulation is by annual sales of the store or business:
 - Less than \$50,000
 - \$50,000 to \$99,000
 - \$100,000 to \$249,000
 - \$250,000 to \$499,000
 - \$500,000 to \$999,000
 - \$1 million or more

PREFERENCES FOR ATA TRADE SHOW DATES AND DAYS

- In a choice of three time periods, Trade Show attendees most commonly preferred late January (48% gave this answer) or early January (35%) over December (12%). Note that throughout the report, “Trade Show attendees” refers only to single-channel retailers who attended one of the Trade Shows; multi-channel retailers (and any other non-retailers who may have attended a Trade Show) are not included in this study.

Q23. If you could choose, in which of the following periods of time would you most prefer for the ATA Trade Show to be held?

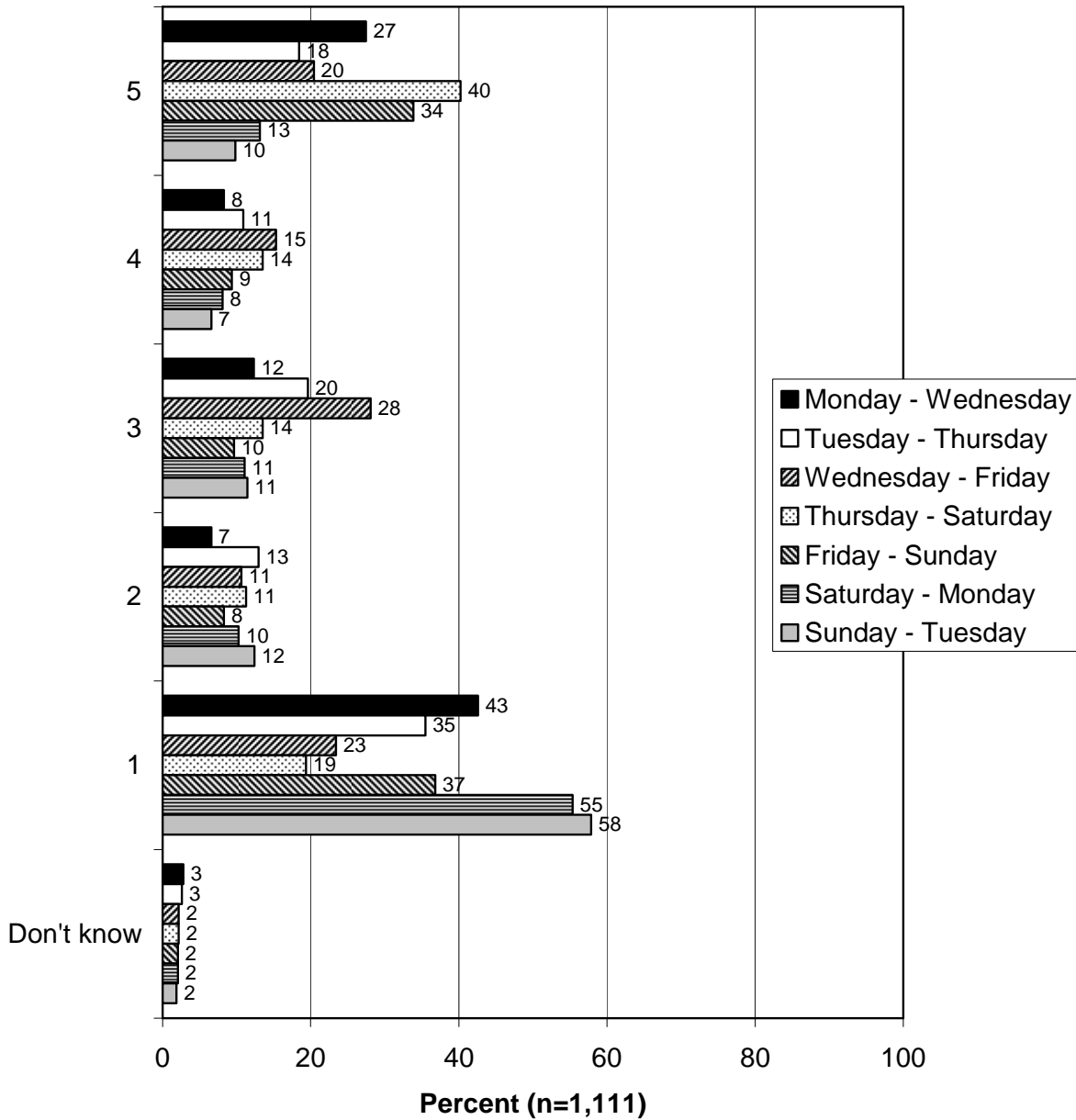


- Trade Show attendees were asked about their preferences regarding the days of the week for the Trade Show. Based on the cumulative data for this series of questions, Thursday through Saturday is the top choice, followed by Wednesday through Friday. These two ranges of days have the most respondents giving them a rating of at least 3, representing support for

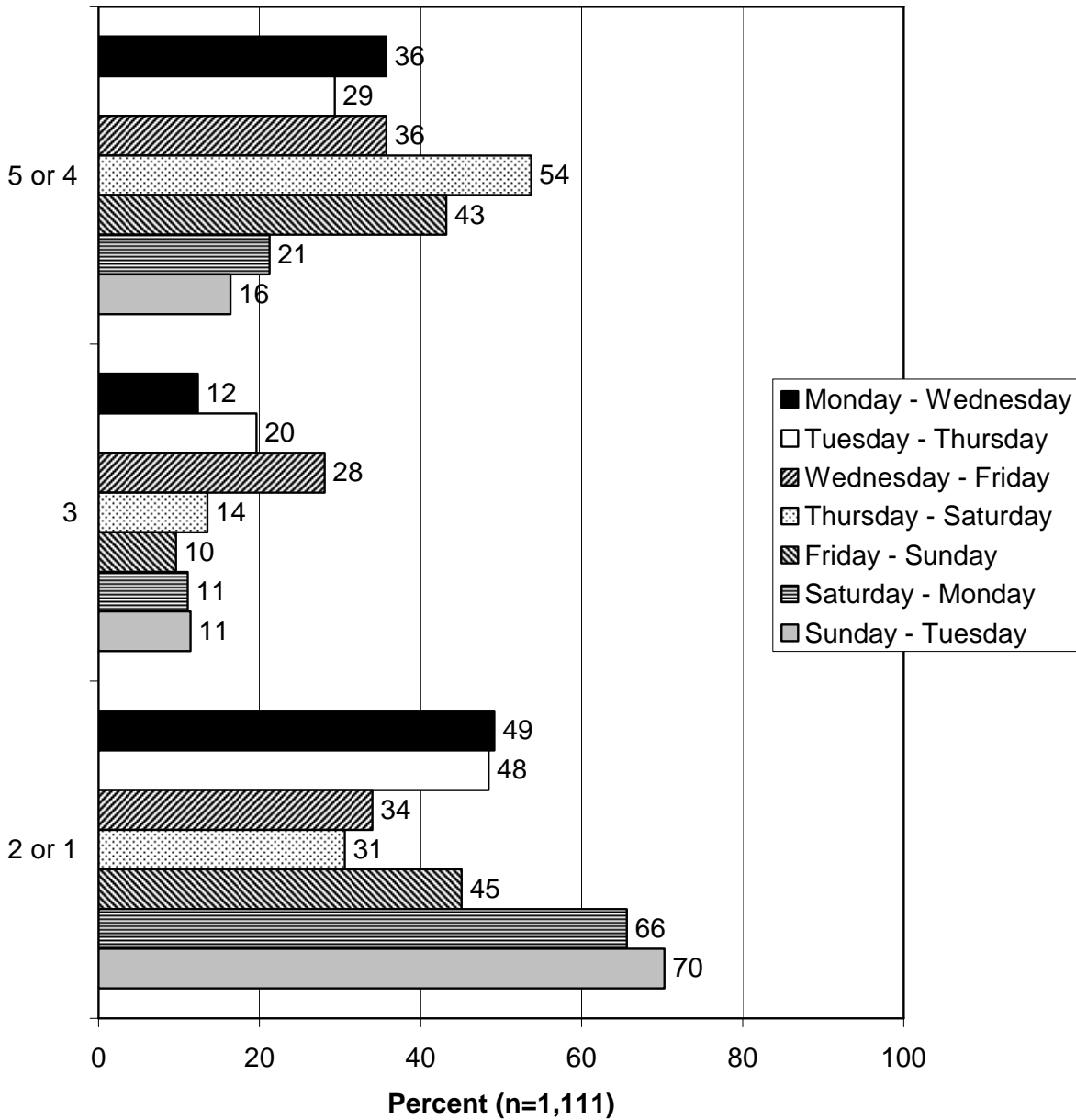
those days, and they have the fewest respondents giving them a rating of 2 or 1, representing dislike of having the Trade Show on those days.

- Note that the survey asked about 3-day stretches of time. The survey asked respondents to rate their liking of all seven possible choices (starting with “Monday through Wednesday” and then “Tuesday through Thursday” and so on) rather than having the respondents choose only one of the seven choices. This way of determining preferences allowed for more nuanced data collection; in other words, this data collection method better accounted for situations where a respondent, for instance, prefers Thursday through Saturday but would also be okay with Wednesday through Friday.
- Four graphs are shown.
 - The first graph simply shows the raw data of the seven choices on one graph; it shows the data that the succeeding graphs were based on. On this graph, the choice with the most respondents rating it “5” is Thursday-Saturday (40%), followed closely by Friday-Sunday (34%). However, before leaping to the conclusion that Friday-Sunday would be a good second choice, note the amount of dislike of that range (37% give it the lowest rating of “1”).
 - The second graph consolidates some answers, providing a less cluttered picture of the data. It combines “5” and “4” into a single group, and it combines “2” and “1” into another group. This shows Thursday-Saturday being the top choice. While Friday-Sunday has much support, it has a large amount of dislike, too.
 - The third graph shows a range of “5” through “3” representing the range that respondents either like or could live with, so to speak, and “2” and “1” representing the range of dislike. This graph shows why Wednesday-Friday is a better second choice: it has 64% rating it “3” or higher and only 34% disliking it.
 - The final graph on this subject shows the mean ratings, reinforcing that the top choice is Thursday-Saturday followed by Wednesday-Friday.

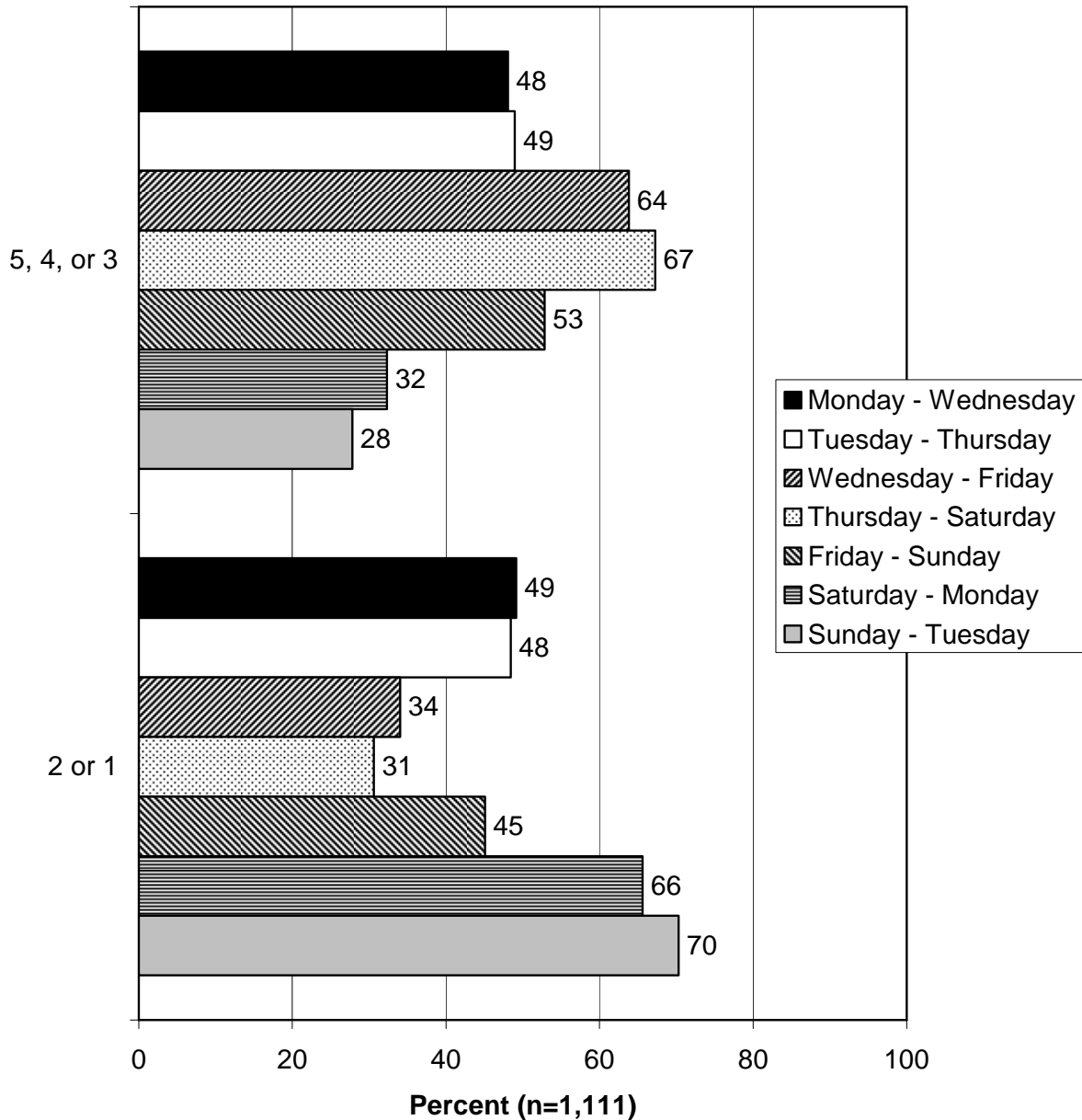
On a scale of 1 to 5, where 1 is you don't like it at all and 5 is you like it a lot, would you prefer having the Trade Show...?



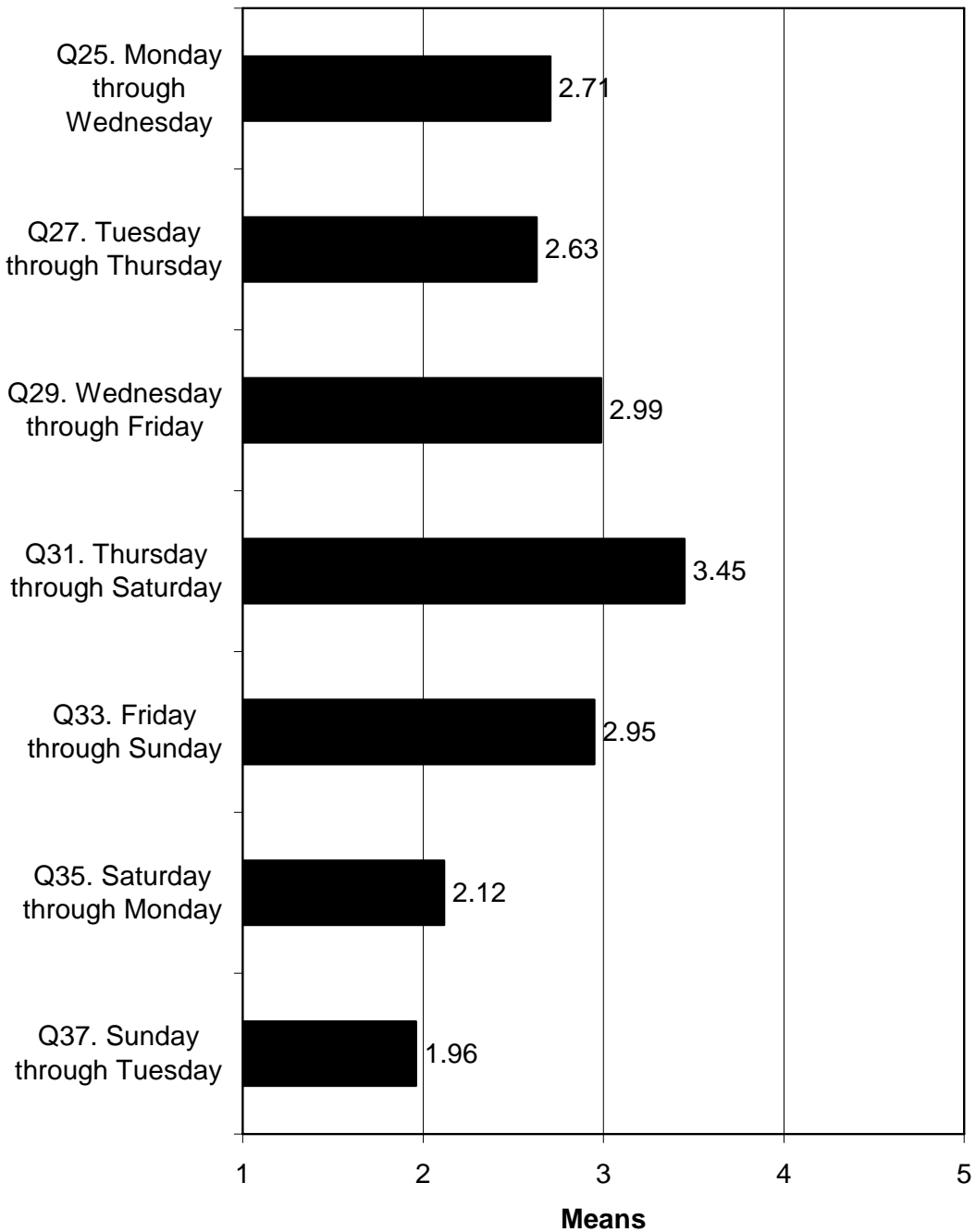
On a scale of 1 to 5, where 1 is you don't like it at all and 5 is you like it a lot, would you prefer having the Trade Show...?



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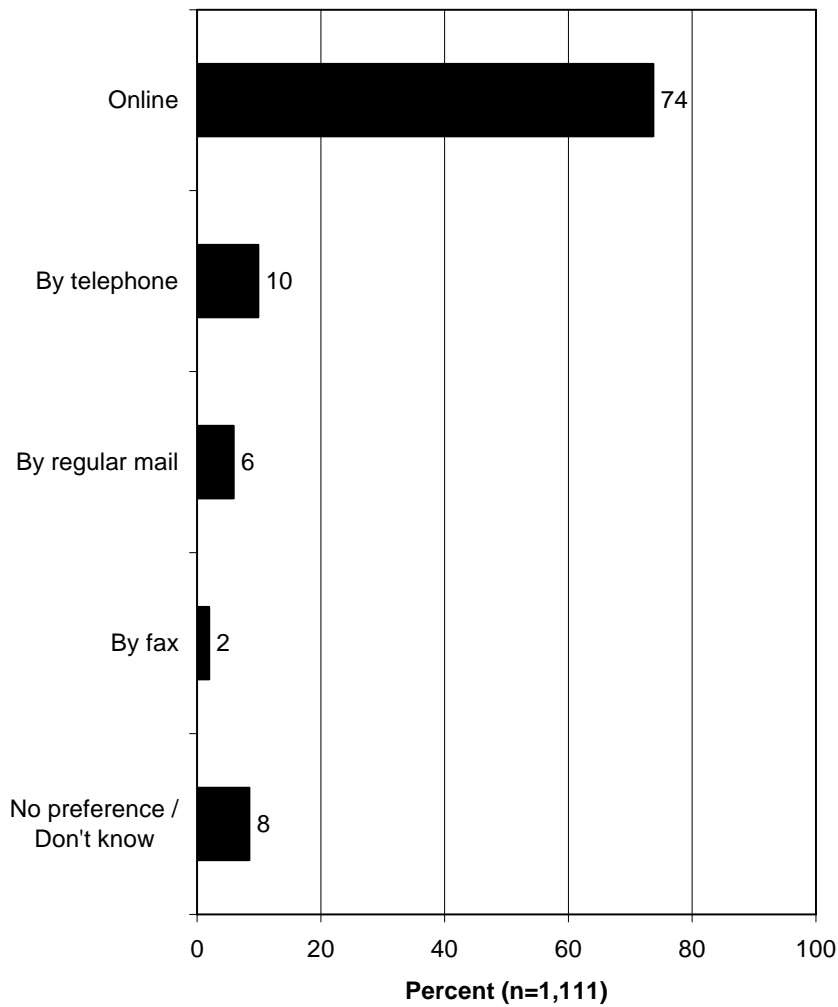
On a scale of 1 to 5, where 1 is they don't like it at all and 5 is they like it a lot, the mean preference of having the Trade Show on the following days.



PREFERENCES REGARDING REGISTERING FOR THE TRADE SHOWS AND BEING CONTACTED

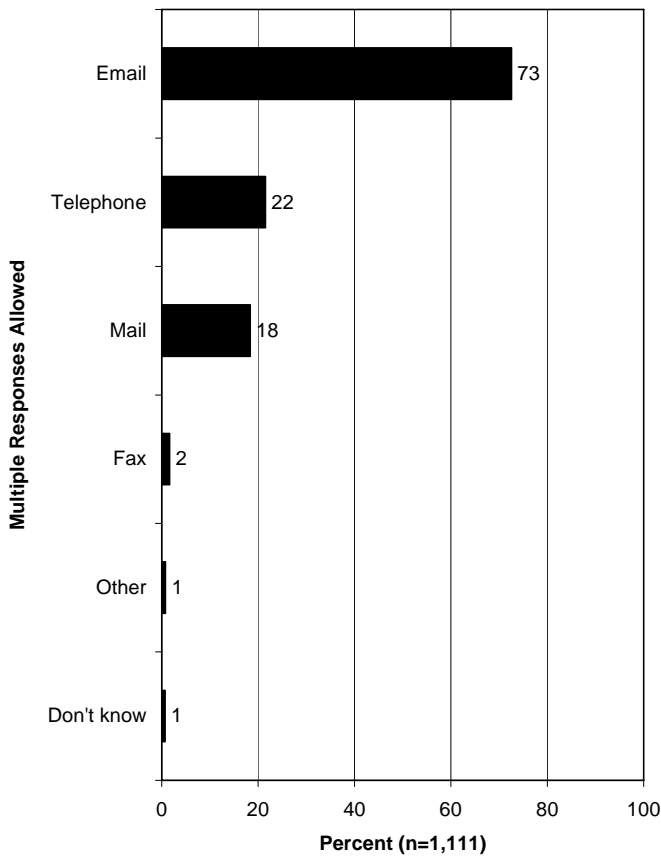
- Online registration (74%) is the most preferred method, by far.

Q58. Which way would you most prefer to register for the ATA Trade Show?

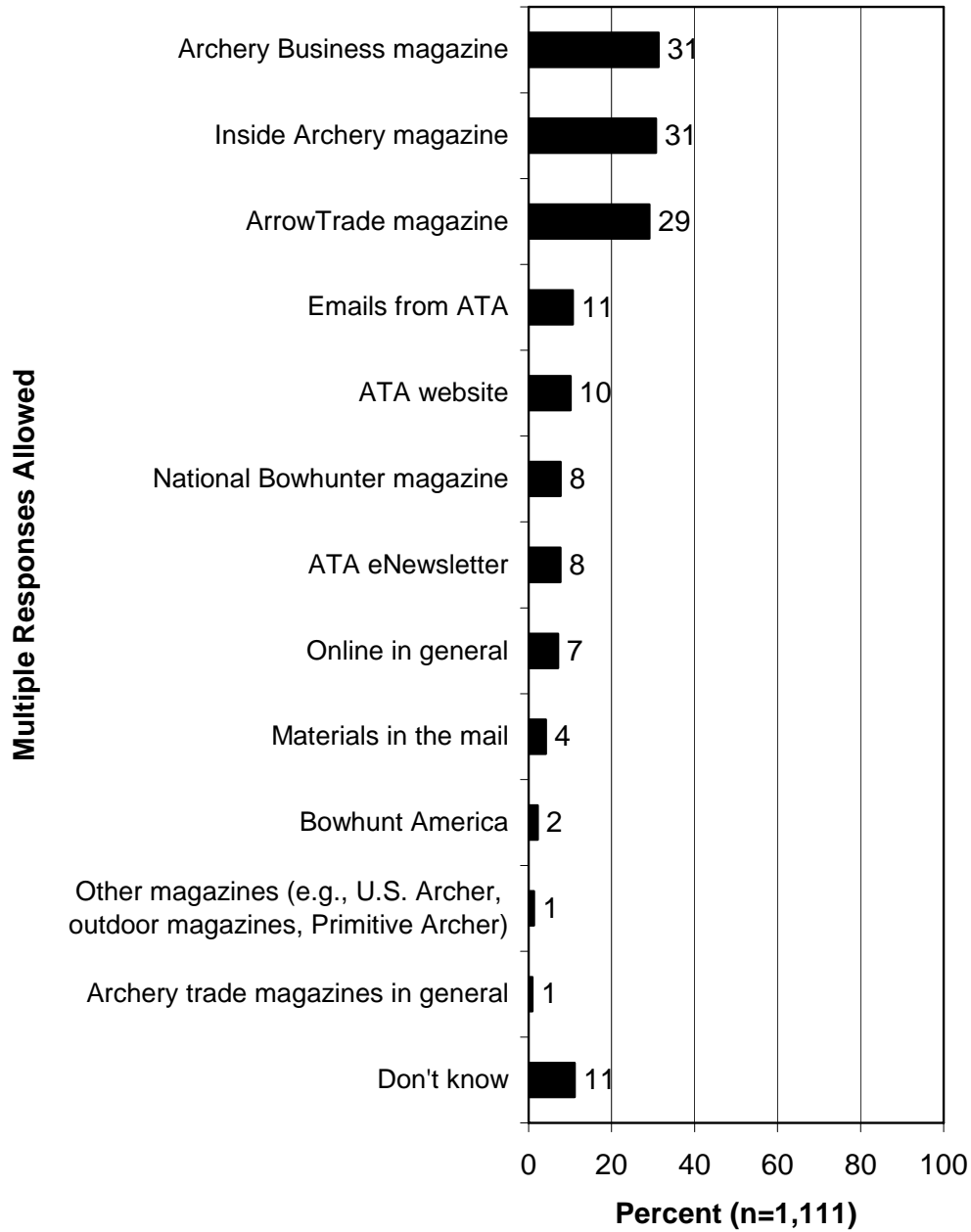


- Three graphs pertain to contacting potential ATA Trade Show attendees.
 - The first graph shows the results to the direct question regarding the best method of contact; email is the most preferred method (73% gave that answer).
 - The second and third graphs in this section show where Trade Show attendees read about the ATA Trade Shows and about the archery industry in general. These were open-ended questions; no choices were read to respondents. The predominant sources are *Inside Archery* magazine, *Archery Business* magazine, and *Arrow Trade* magazine.

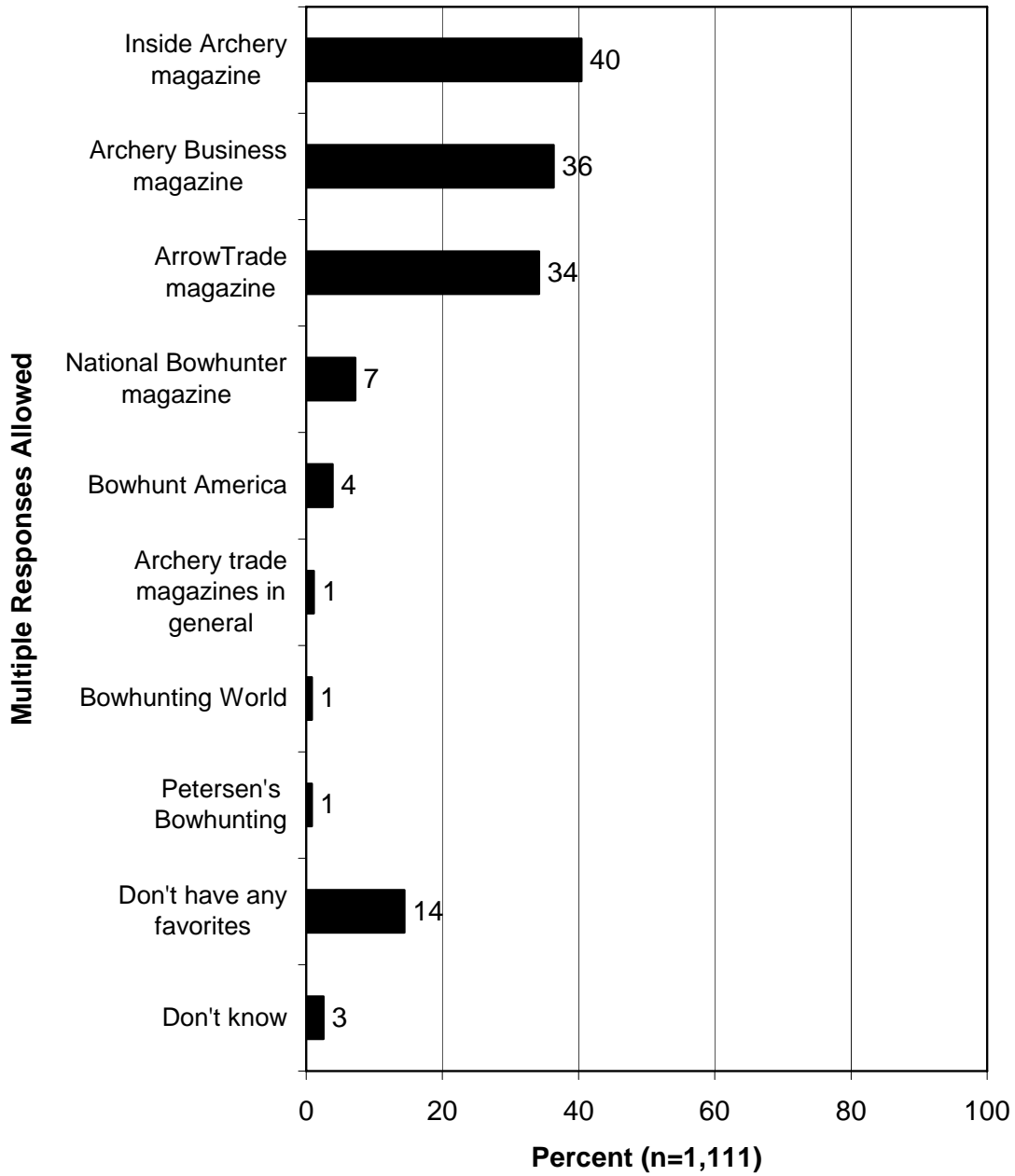
Q76. What is the best way for the ATA to reach you with information about the Trade Show?



Q41. Where do you like to read about the ATA Trade Show?



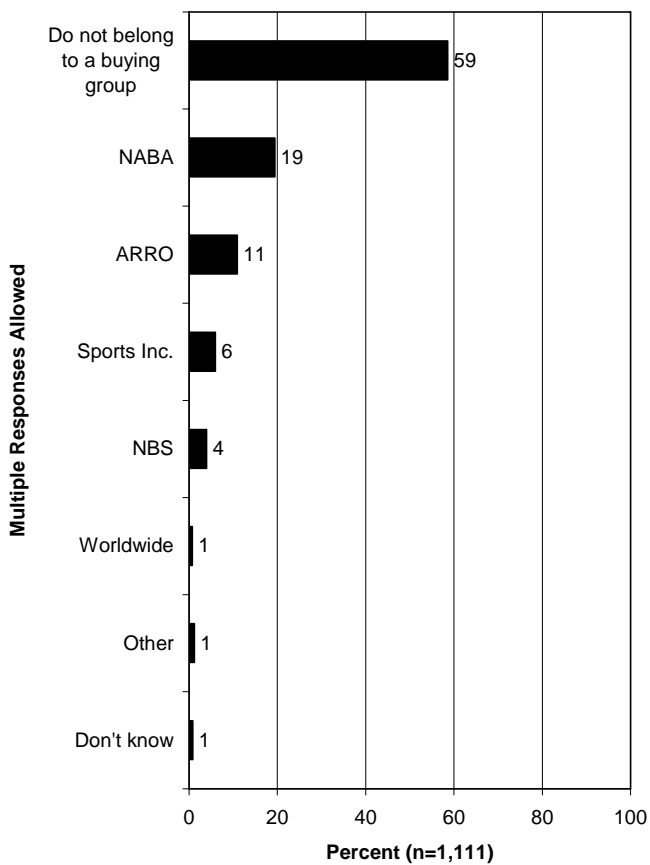
Q45. Which trade magazine do you prefer to read for information about the archery and bowhunting industry?



BUYING GROUPS AND PURCHASING THROUGH A DISTRIBUTOR

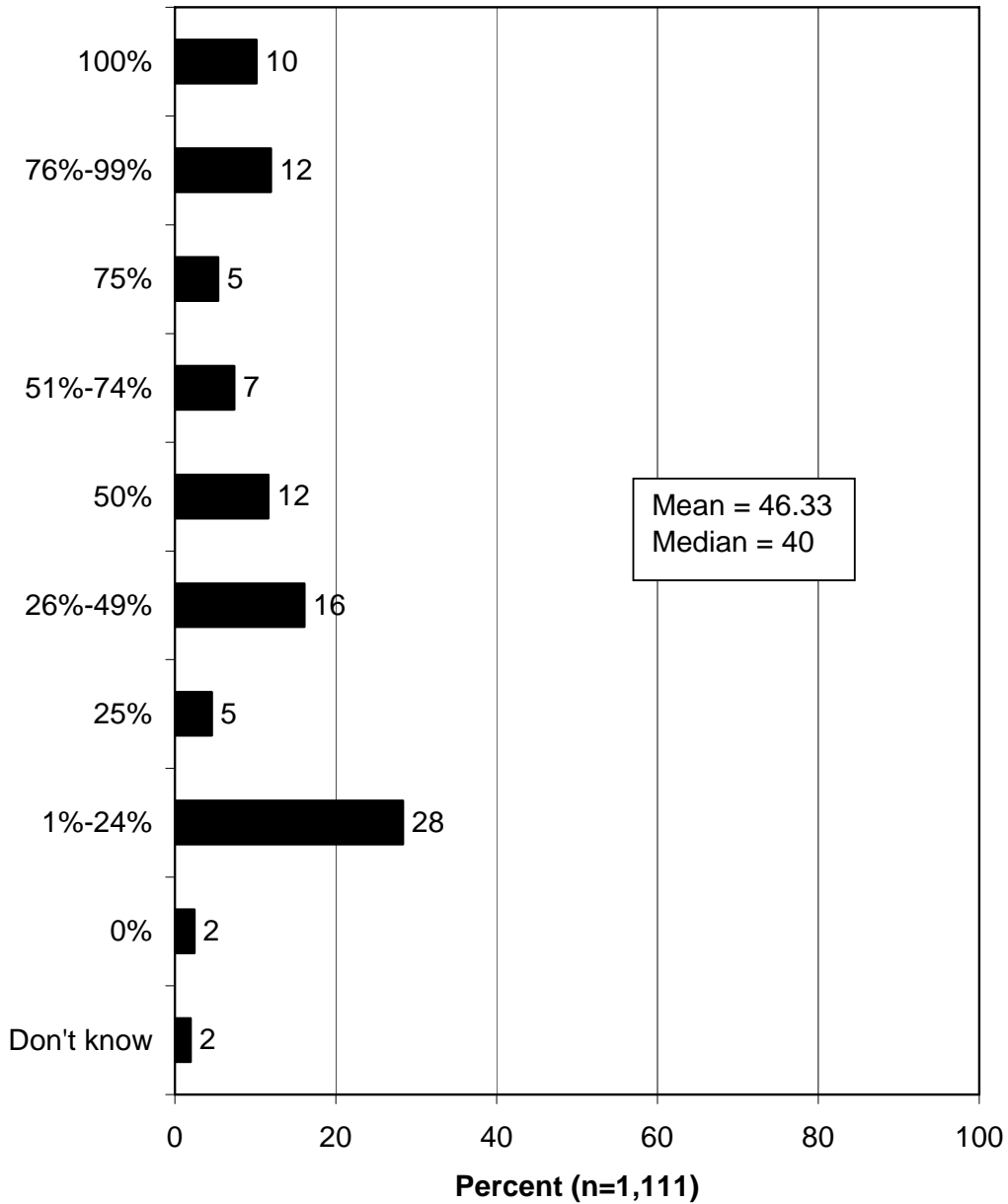
- The majority of Trade Show attendees do *not* belong to a buying group (59%). Otherwise, NABA (19%) and ARRO (11%) are the most common buying groups.

Q49. Do you belong to any buying groups? If so, which ones?



- Another question asked about the percentage of archery product that is purchased through a distributor. At least 88% of Trade Show attendees indicate *not* using a distributor for at least some of their purchasing of archery product. The median amount purchased through a distributor is 40 percent of product.

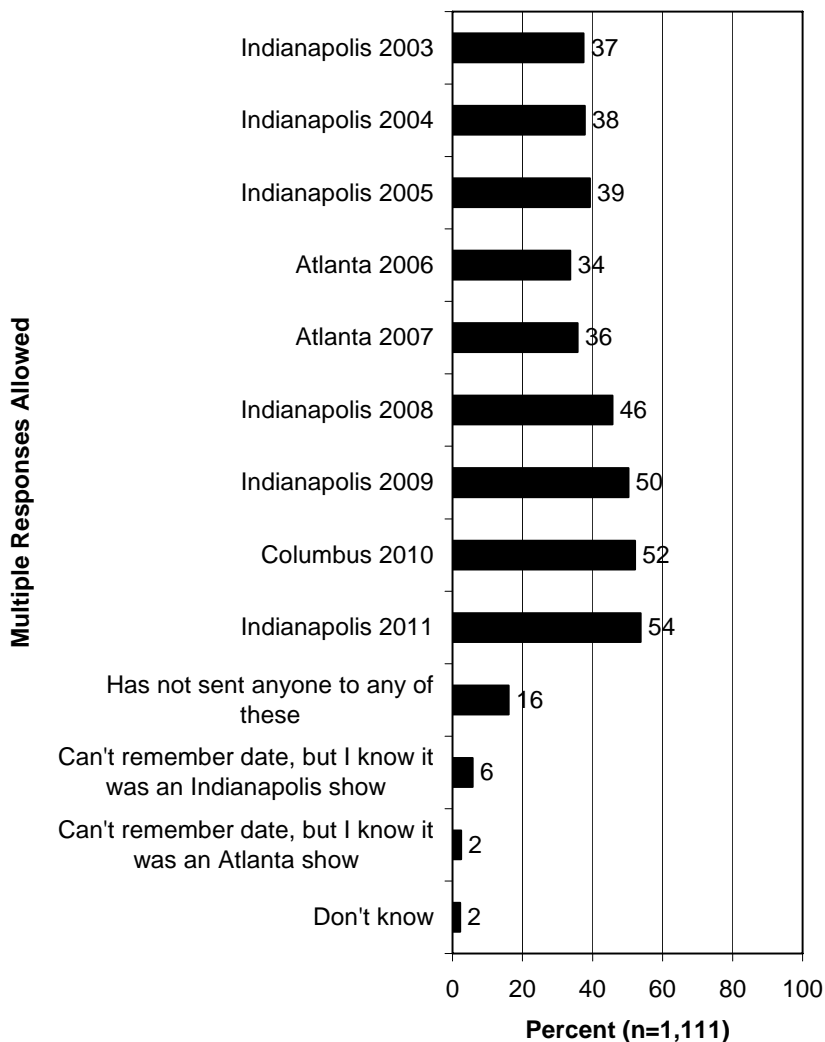
Q72. Approximately what percentage of your archery and bowhunting-related product is purchased through a distributor?



ATTENDANCE AT PREVIOUS ATA TRADE SHOWS AND LIKELIHOOD TO ATTEND FUTURE ATA TRADE SHOWS

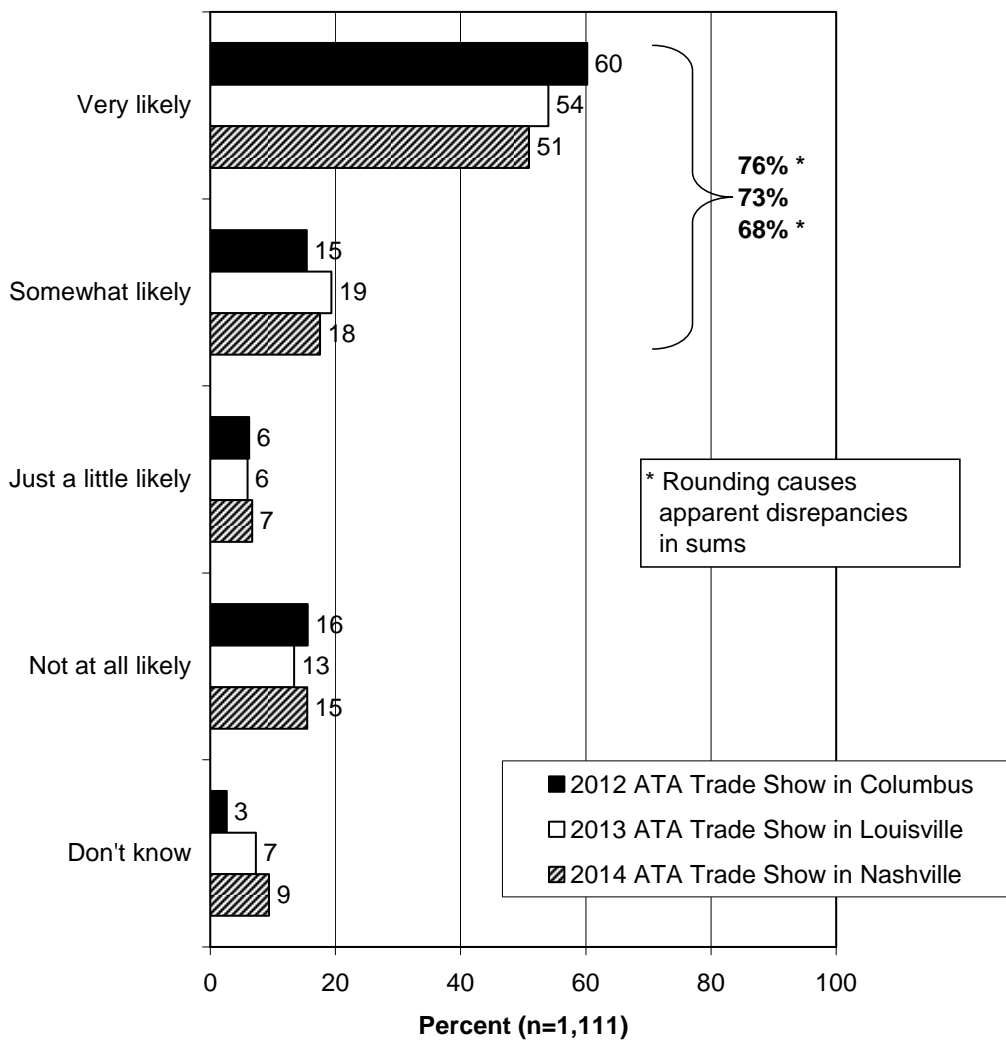
- The first graph in this section shows the ATA Trade Shows that respondents recalled having attended.

Q54. Which ATA Trade Shows has your store/business sent a representative since 2003?



- The second graph pertains to likelihood to attend future shows. Prudence suggests that in assessing likelihood to attend a Trade Show, only the “very” and “somewhat” likely responses should be considered to be likely to attend. The data suggest that about a quarter of respondents are likely to attend any given future show.

How likely is it that your store/business will send someone to the...?



CROSSTABULATIONS OF RESULTS

As previously stated, eight crosstabulations are presented. Each series of crosstabulations is preceded by the graph of the overall results for comparison with the crosstabulation graphs.

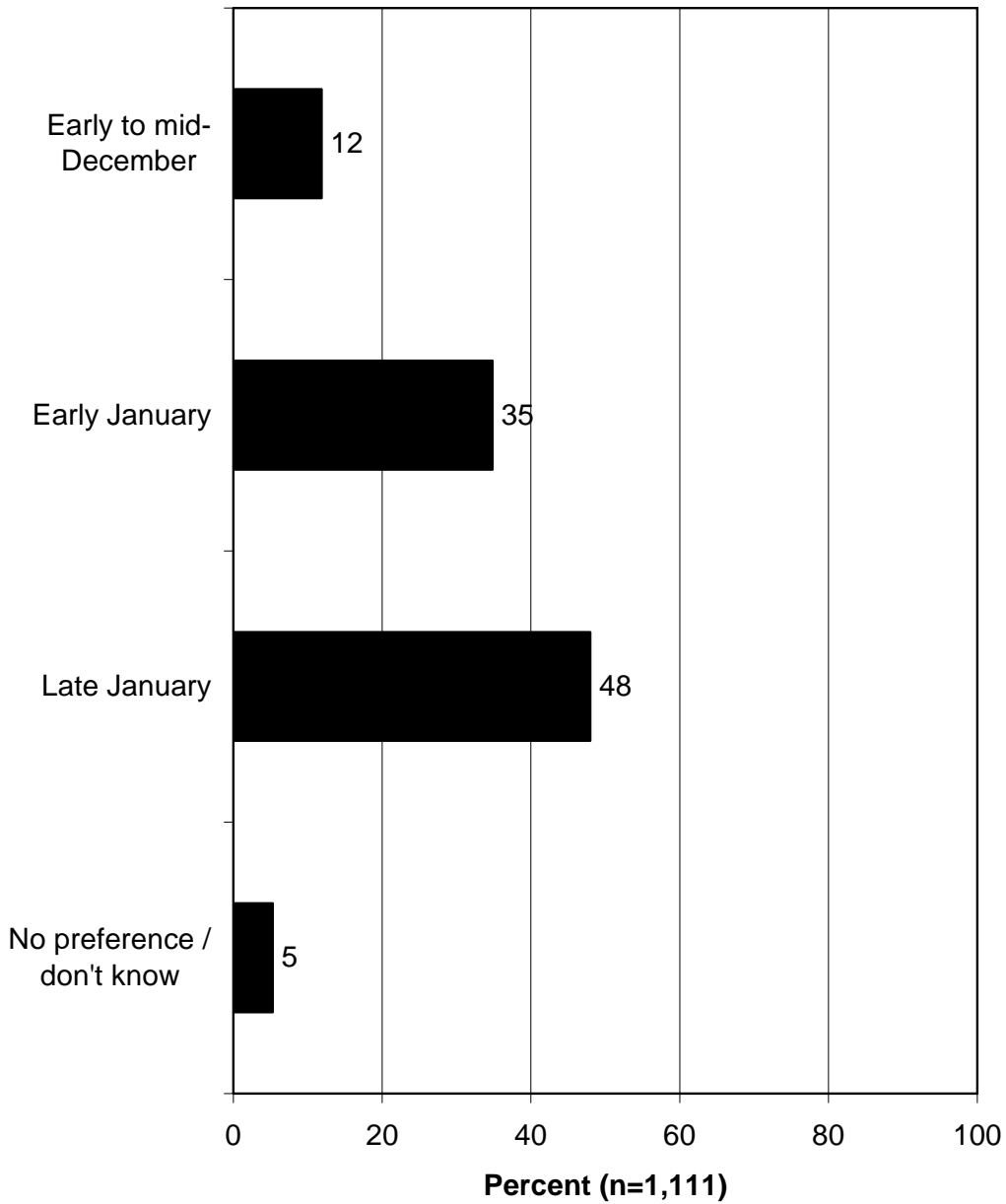
After the overall results, the eight crosstabulations are presented in the same order:

- Show attendance, by past 2 years
- Show attendance, by city
- Show attendance, by number of shows attended
- Region
- State
- Membership in buying clubs
- Membership in buying clubs, consolidated data
- Annual sales

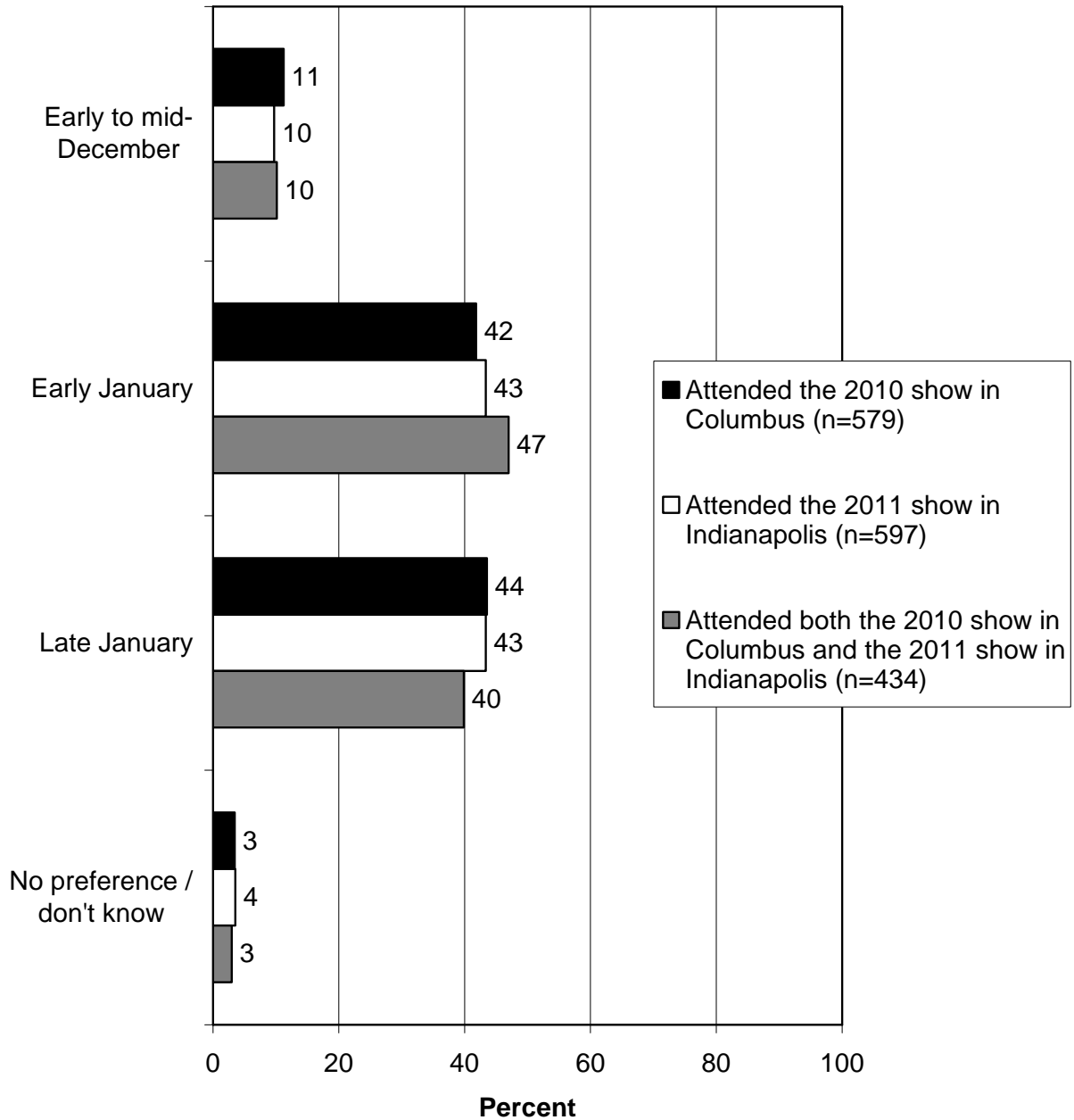
The same chapter subheadings used for the main body of the report are used to organize the data presented in this crosstabulation section.

PREFERENCES FOR ATA TRADE SHOW DATES AND DAYS

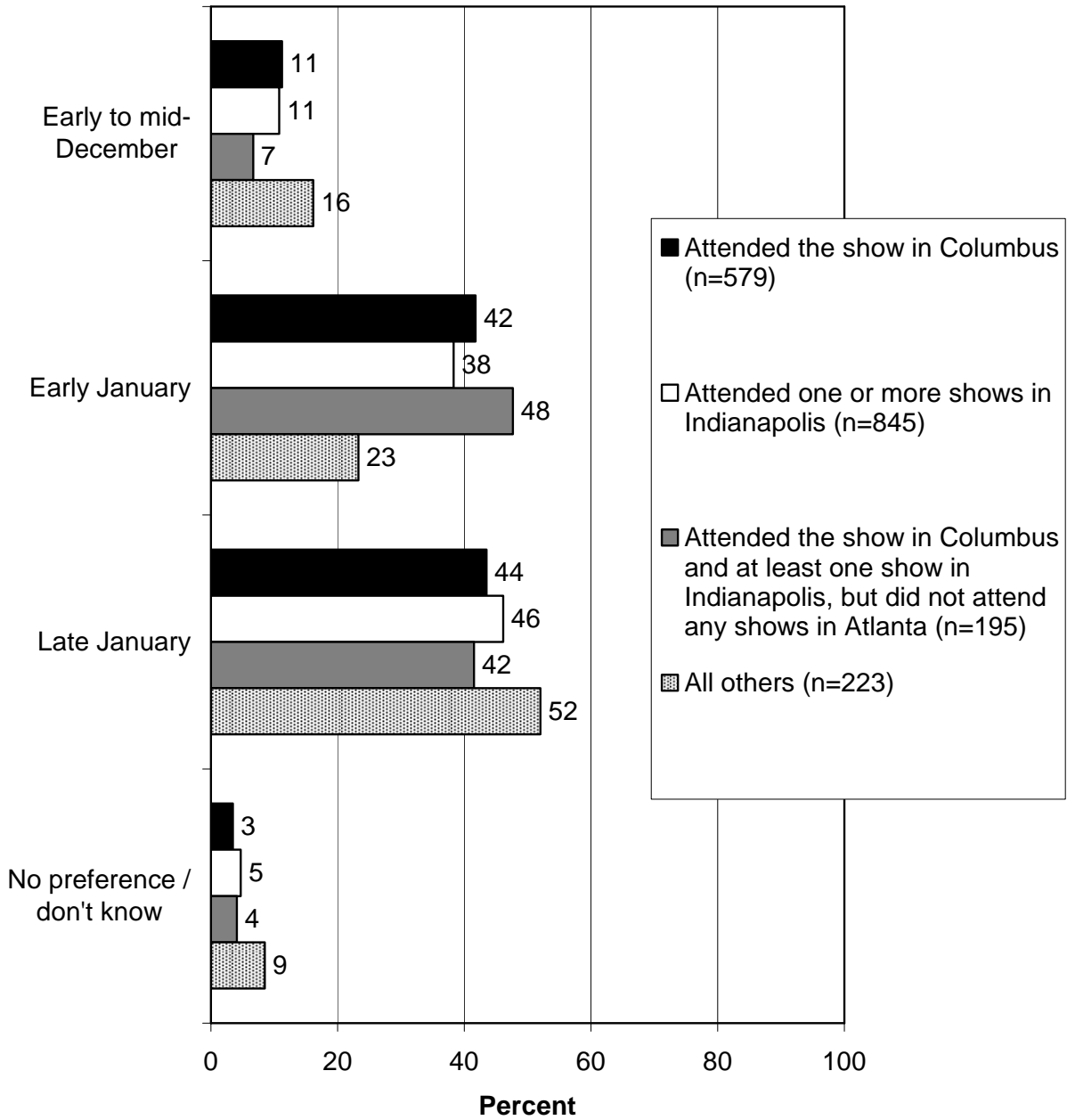
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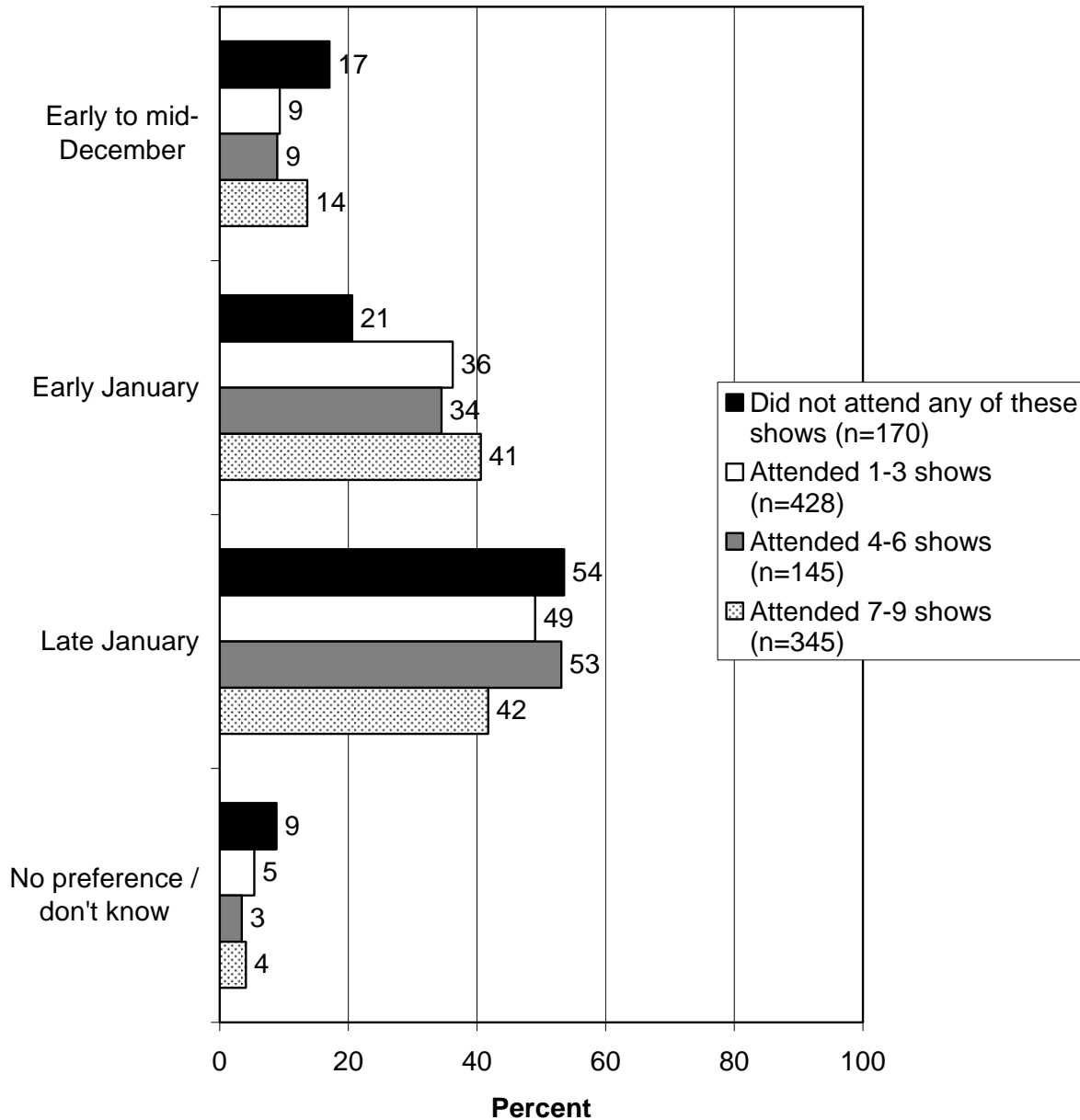
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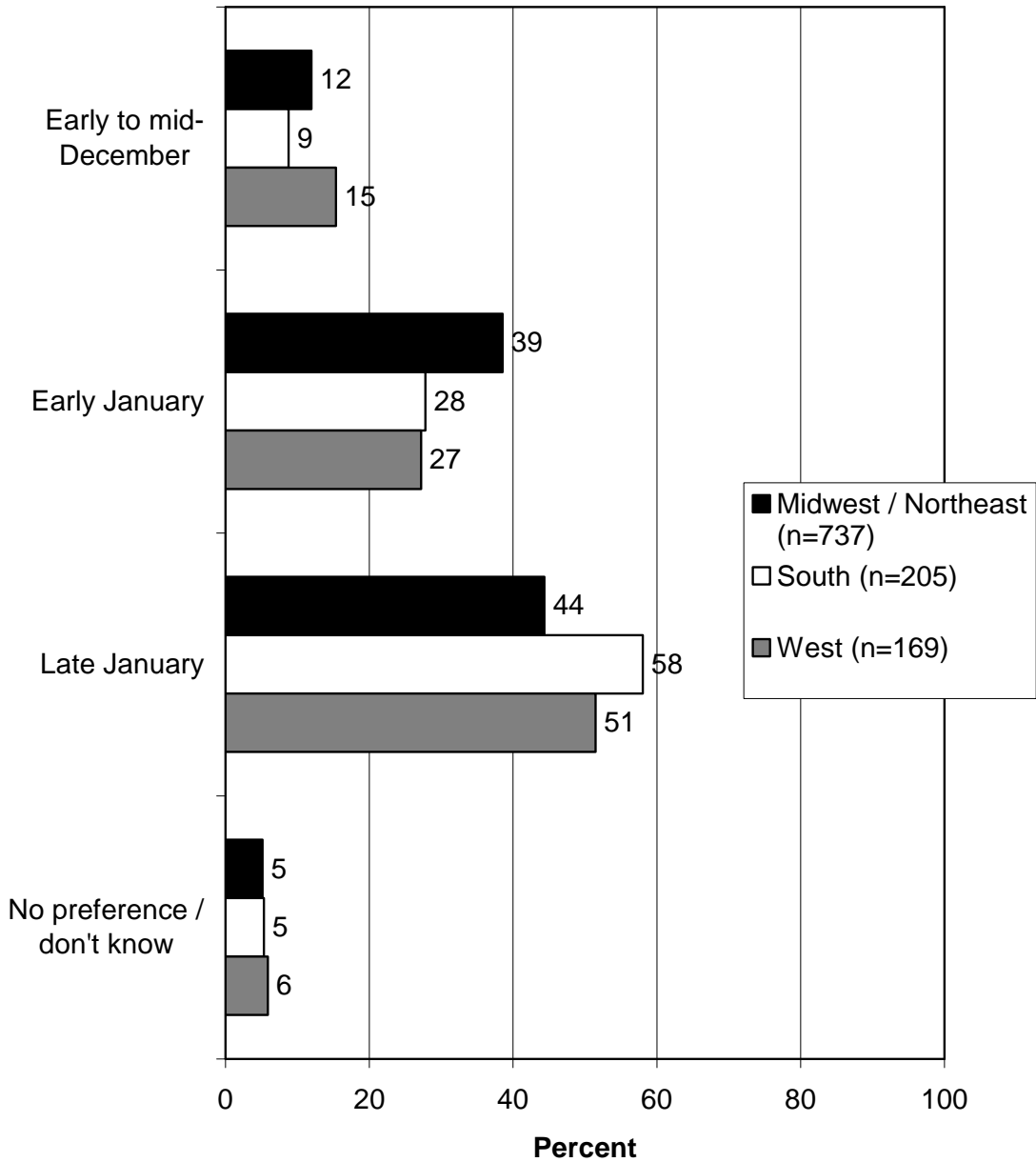
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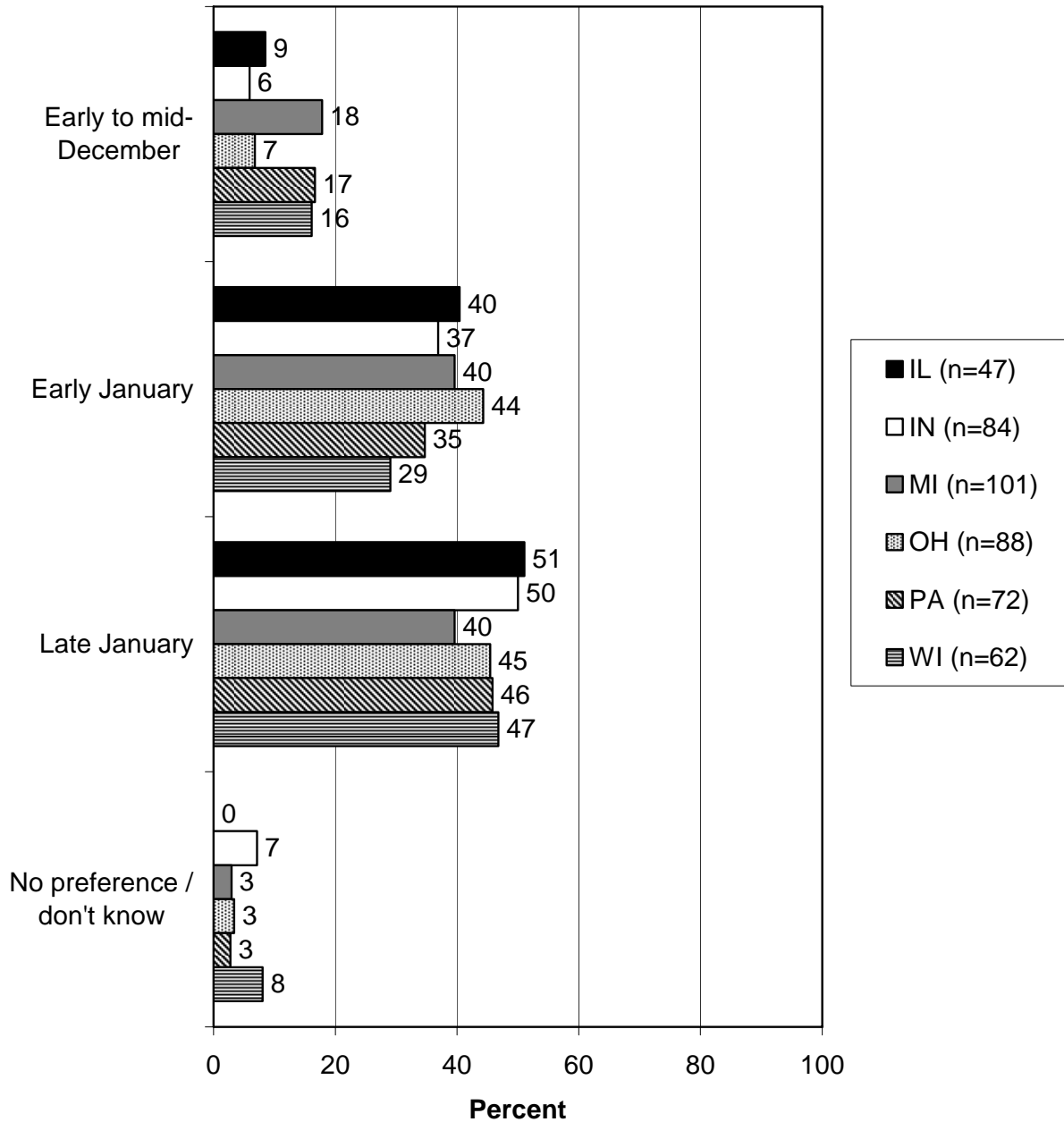
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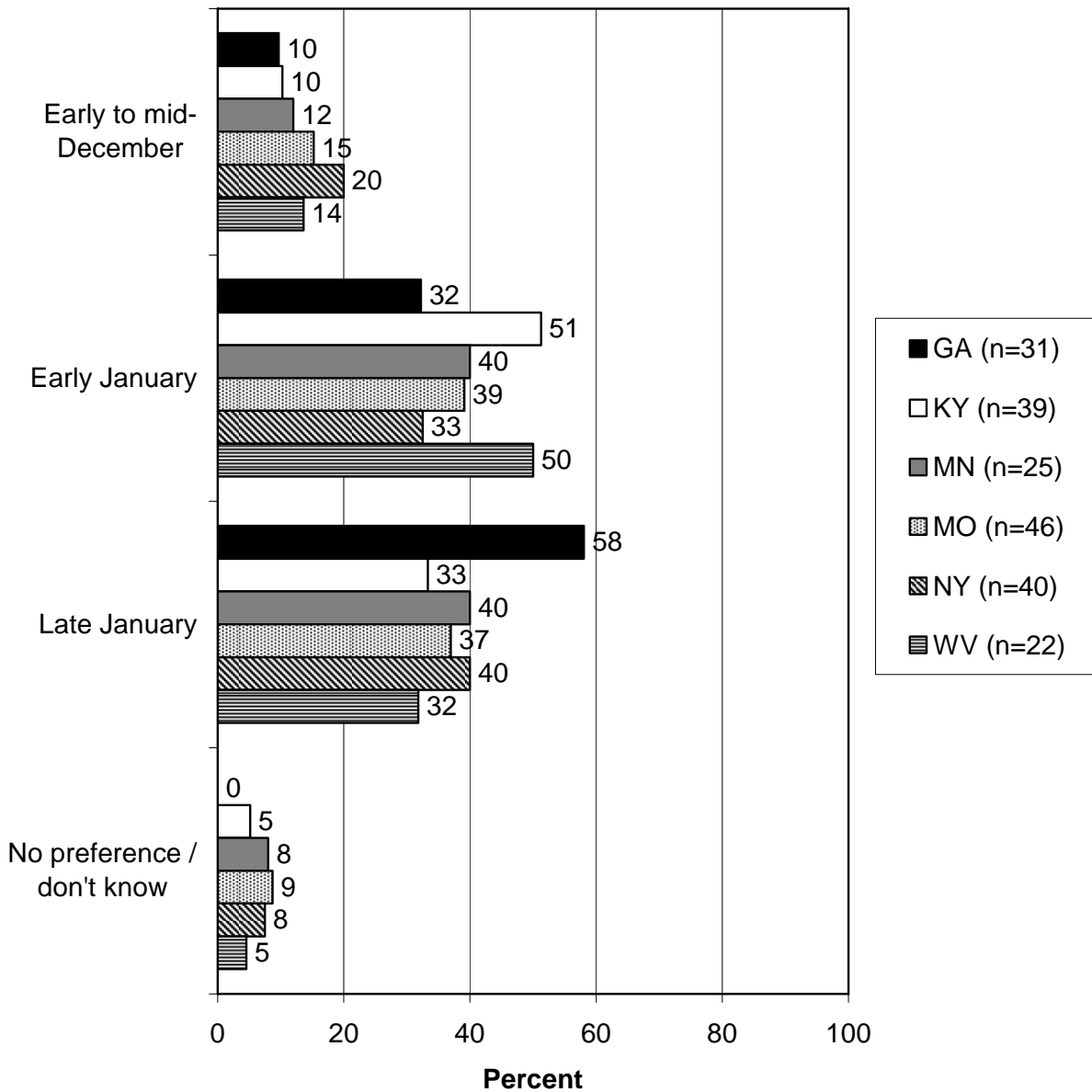
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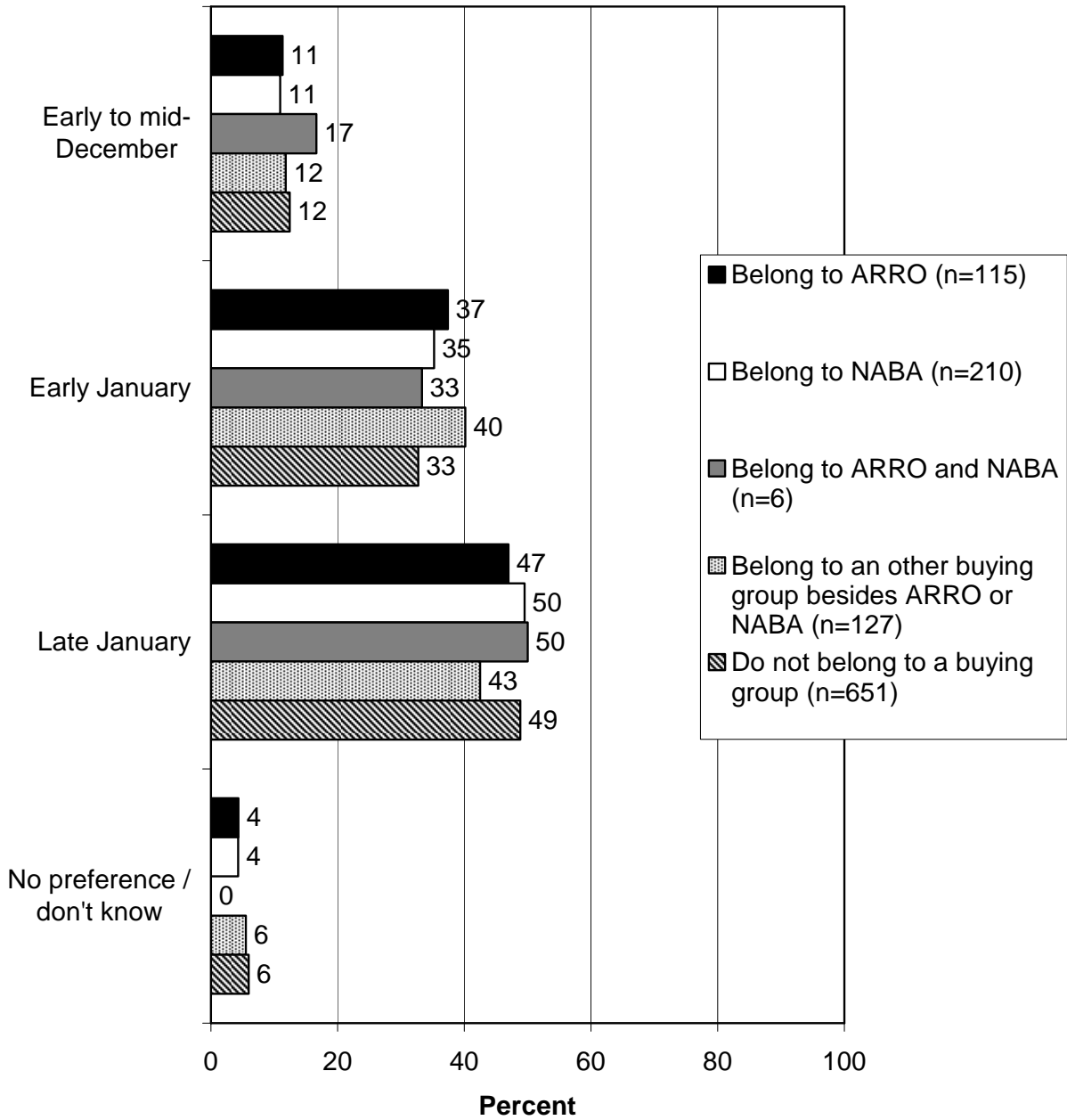
**Q23. If you could choose, in which of the following periods of time would you most prefer for the ATA Trade Show to be held?
(Top 6 of 12 states with a large number of stores)**



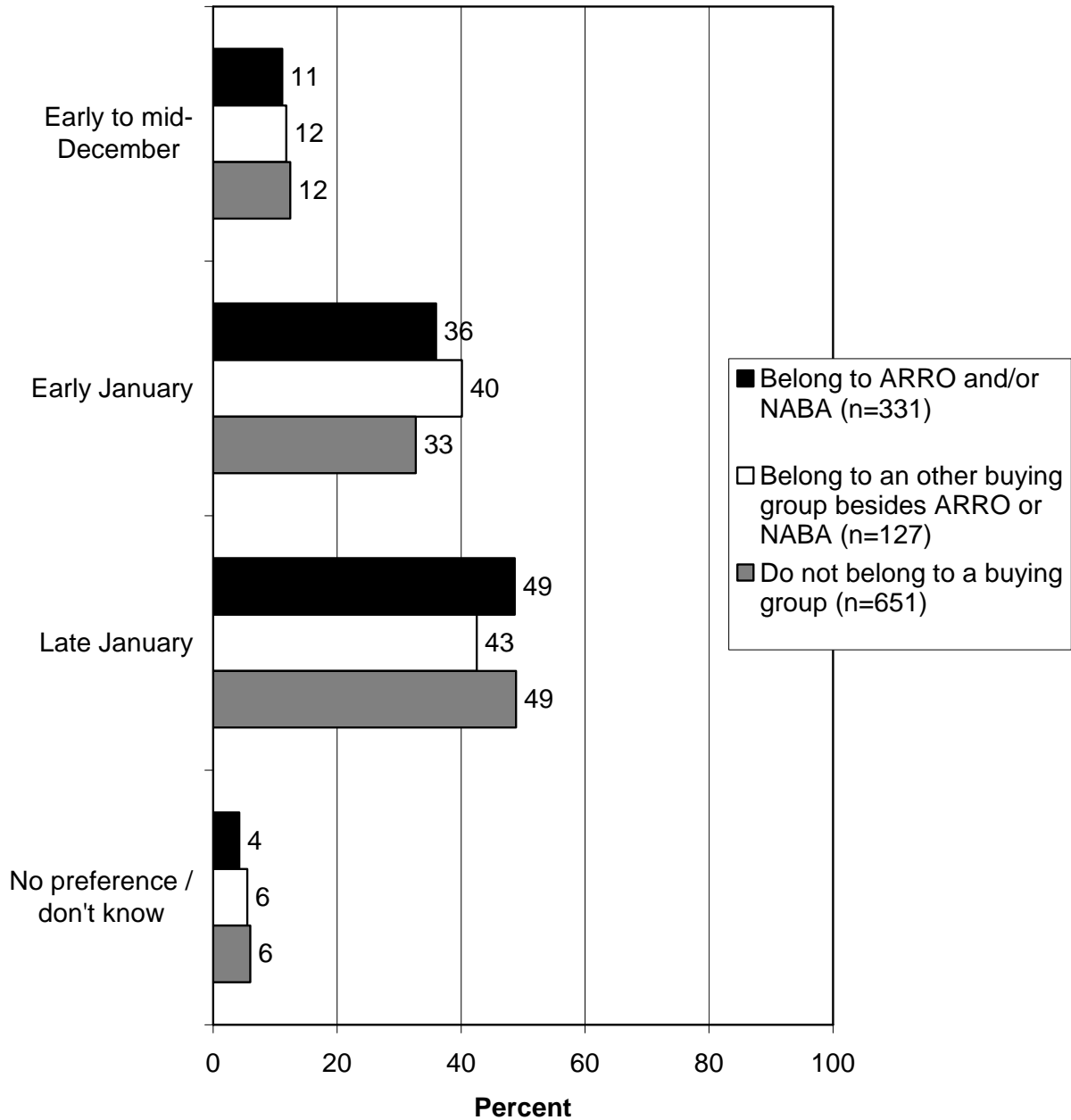
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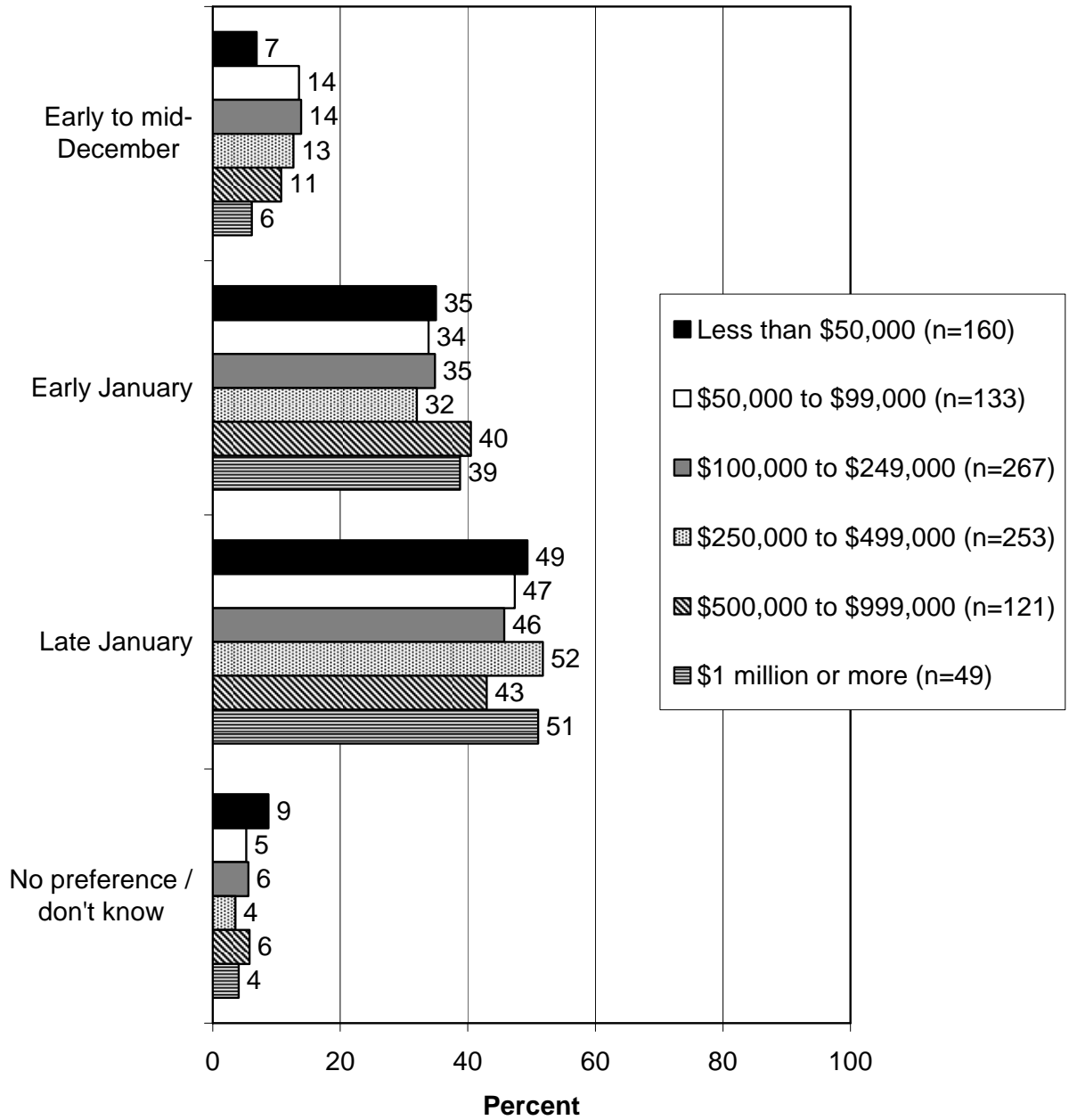
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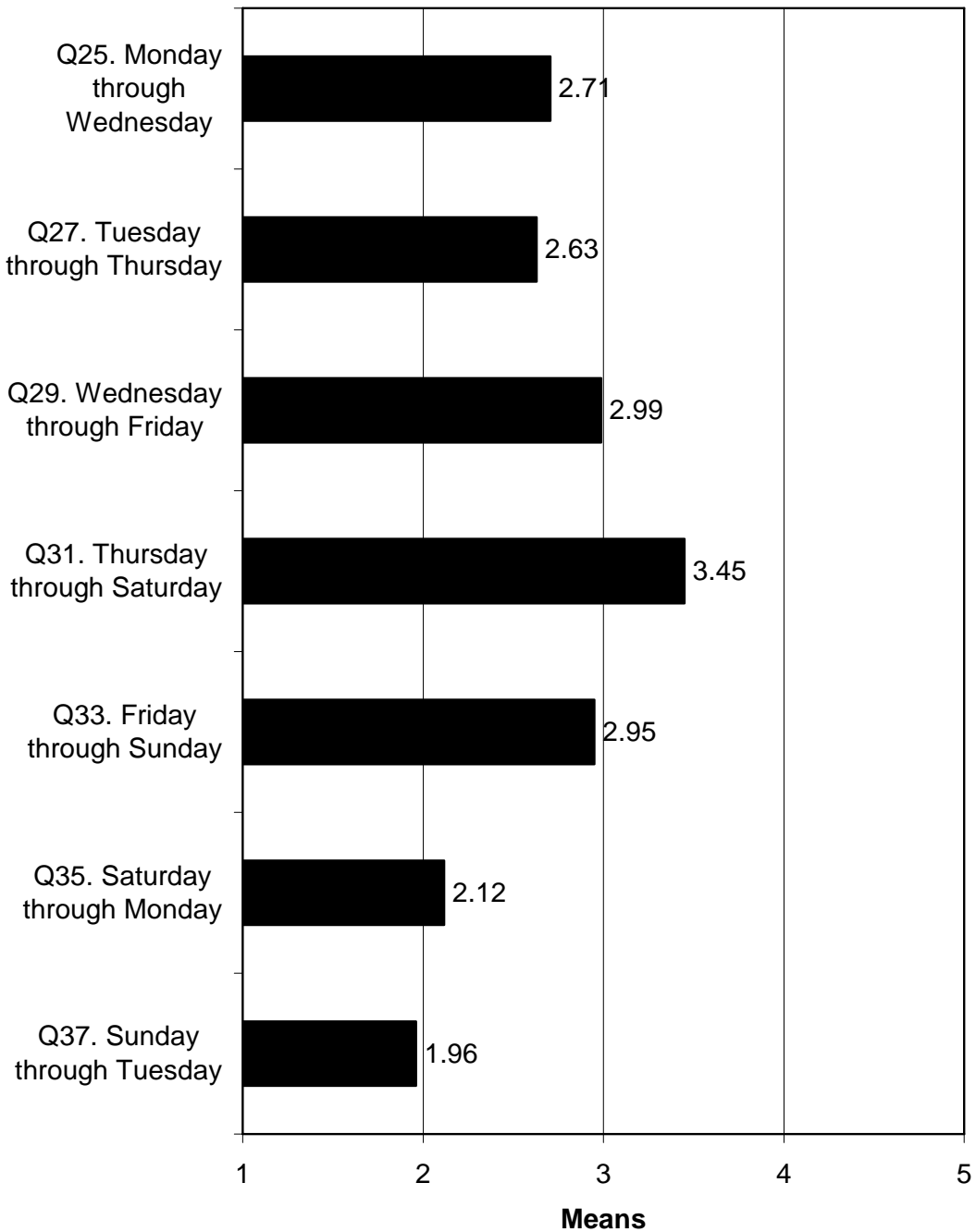
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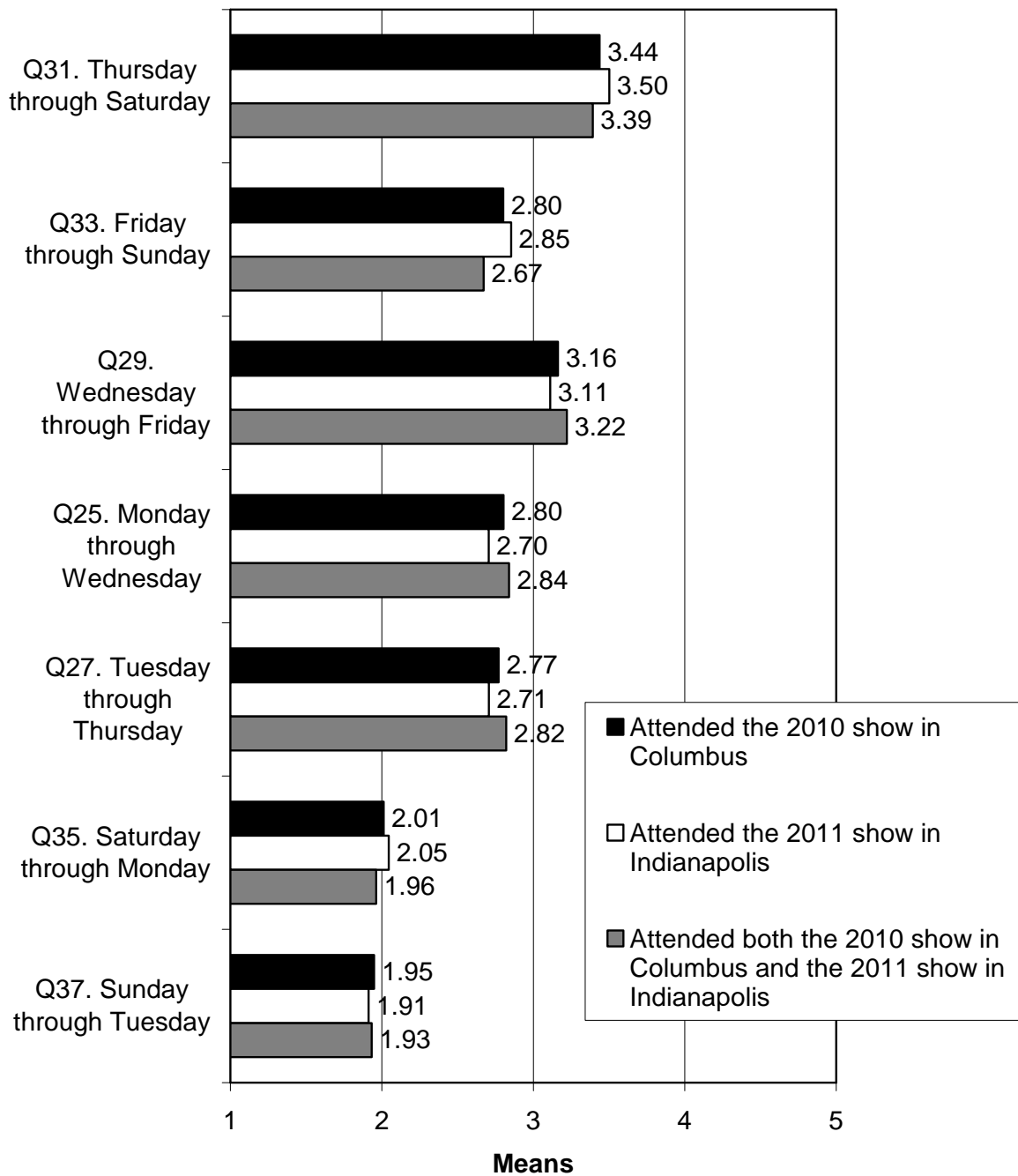
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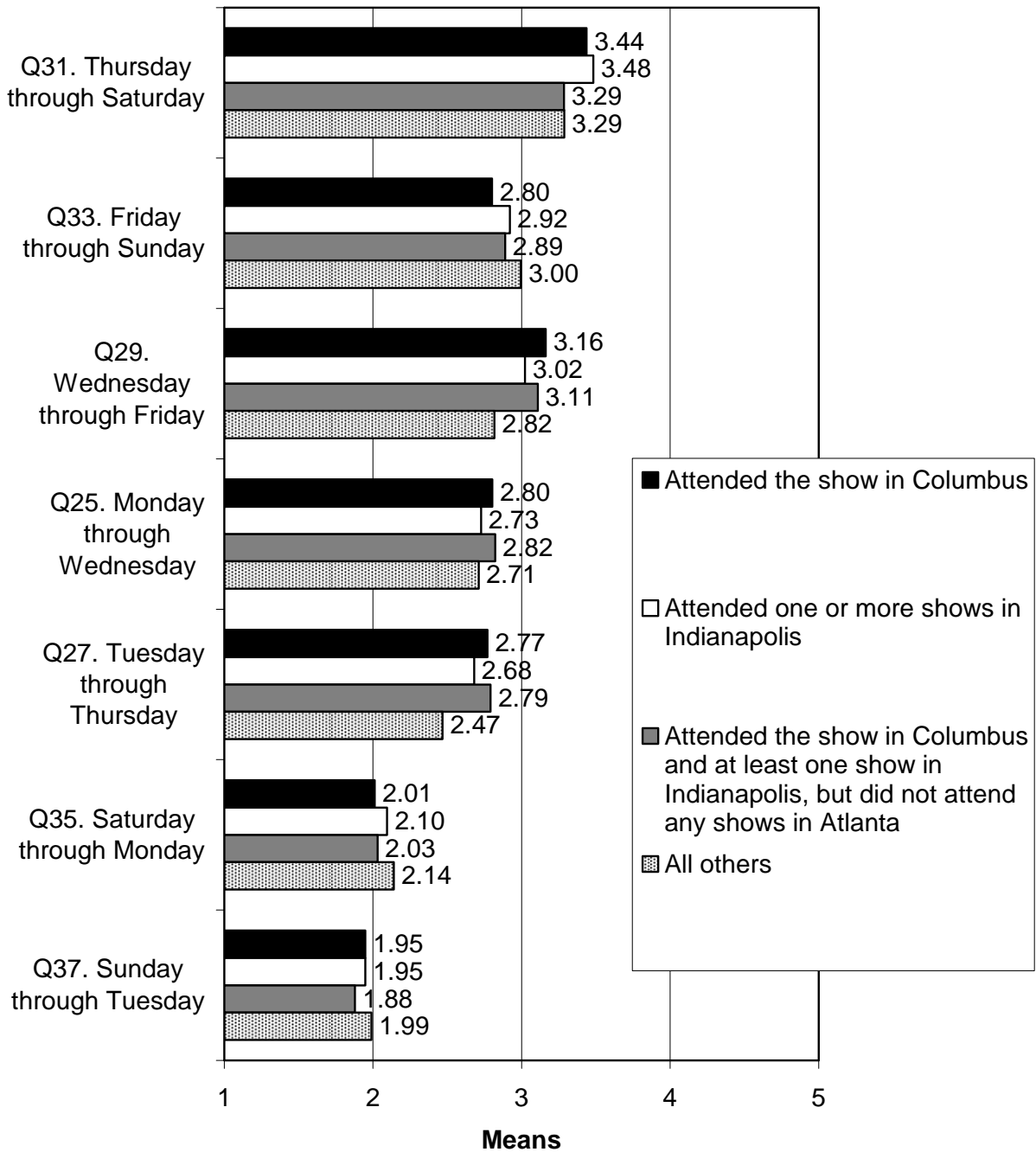
On a scale of 1 to 5, where 1 is they don't like it at all and 5 is they like it a lot, the mean preference of having the Trade Show on the following days.



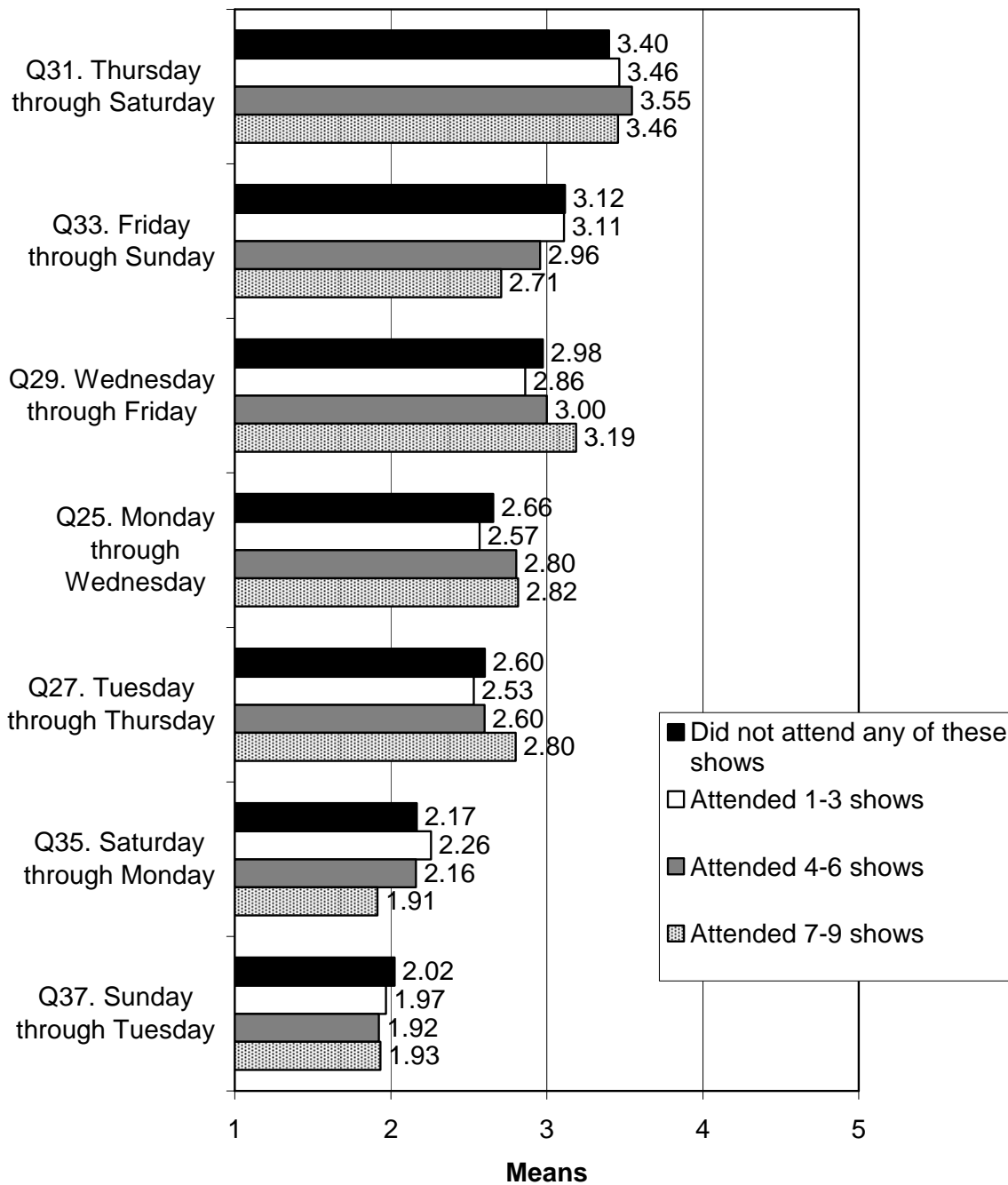
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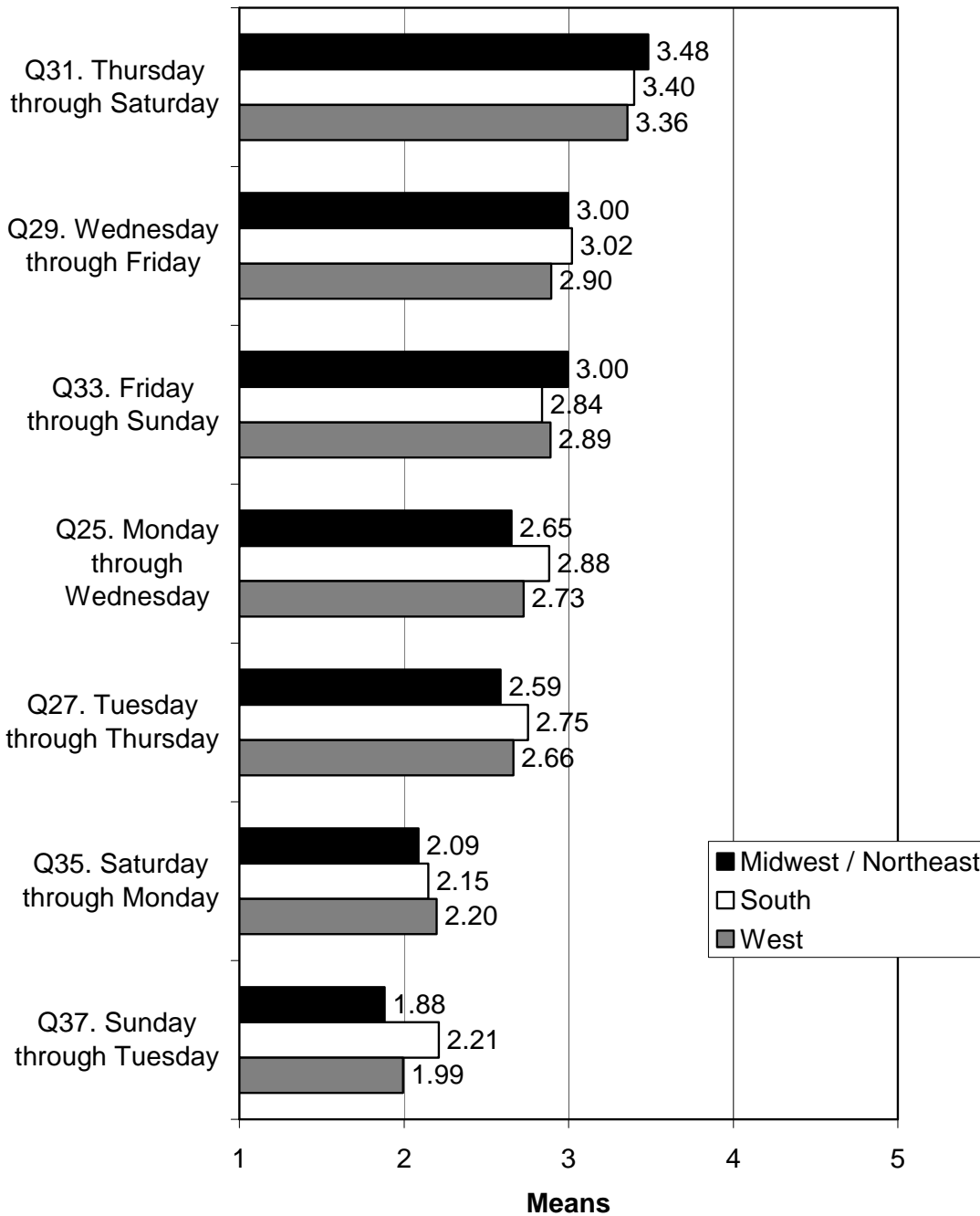
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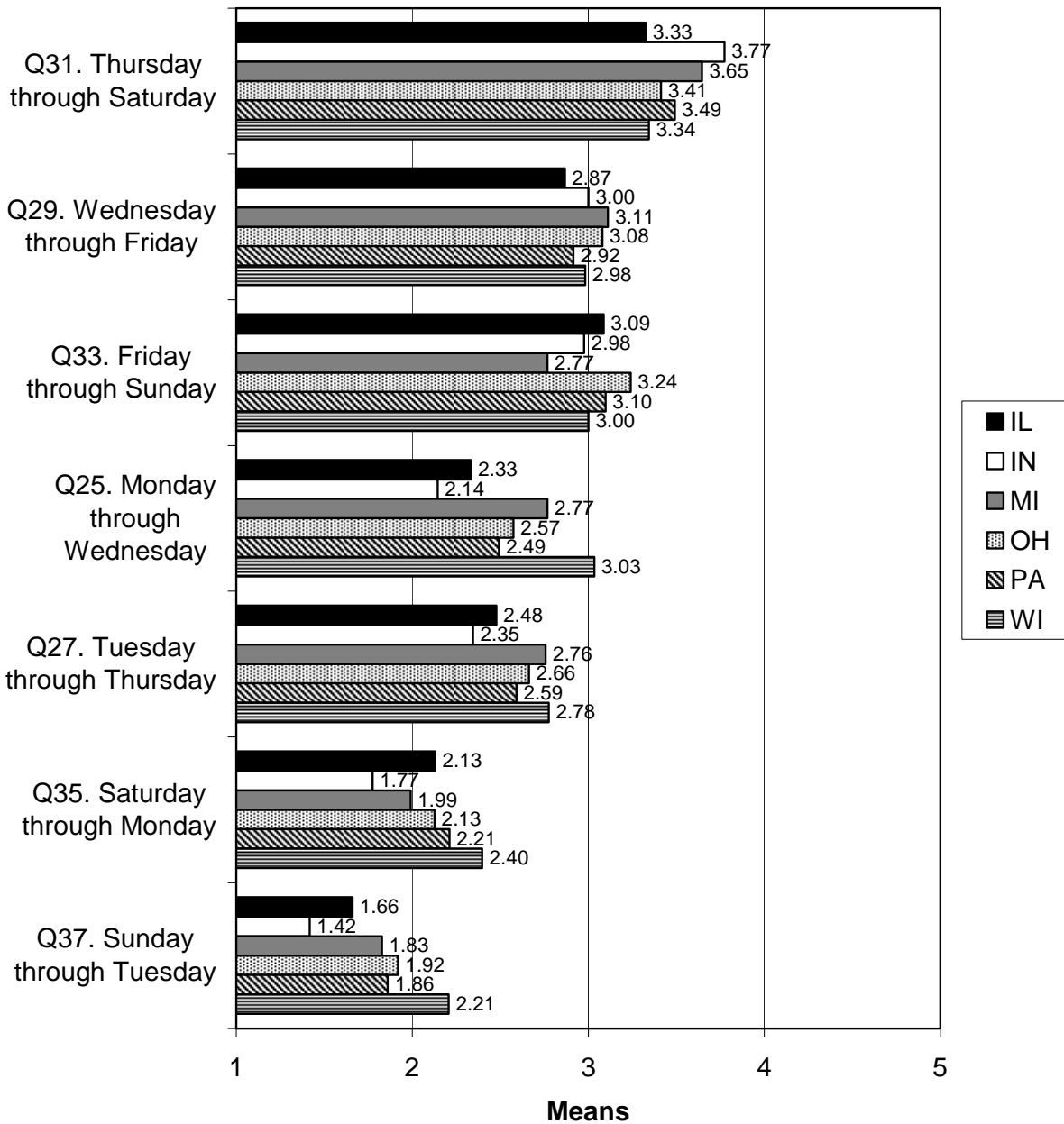
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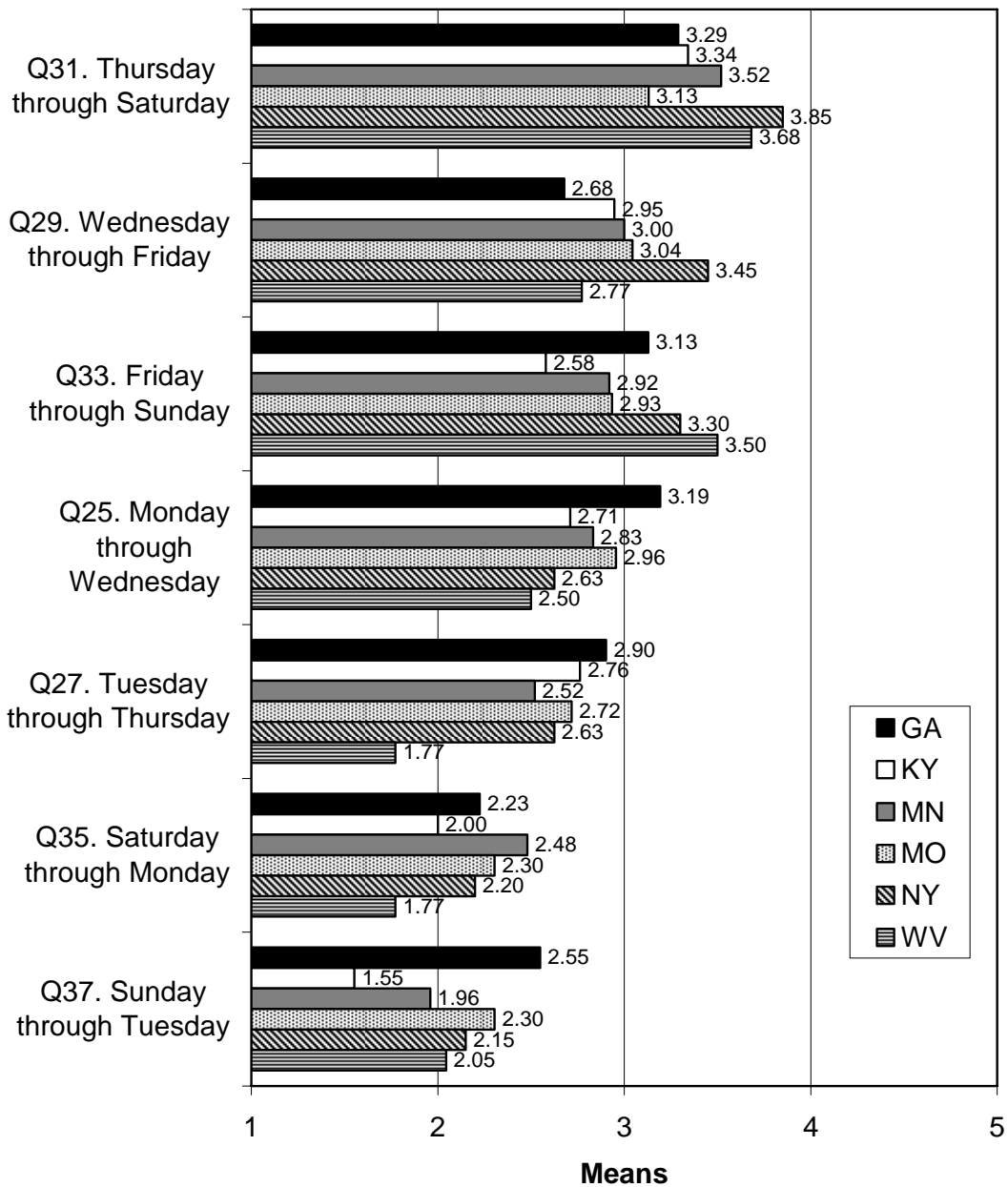
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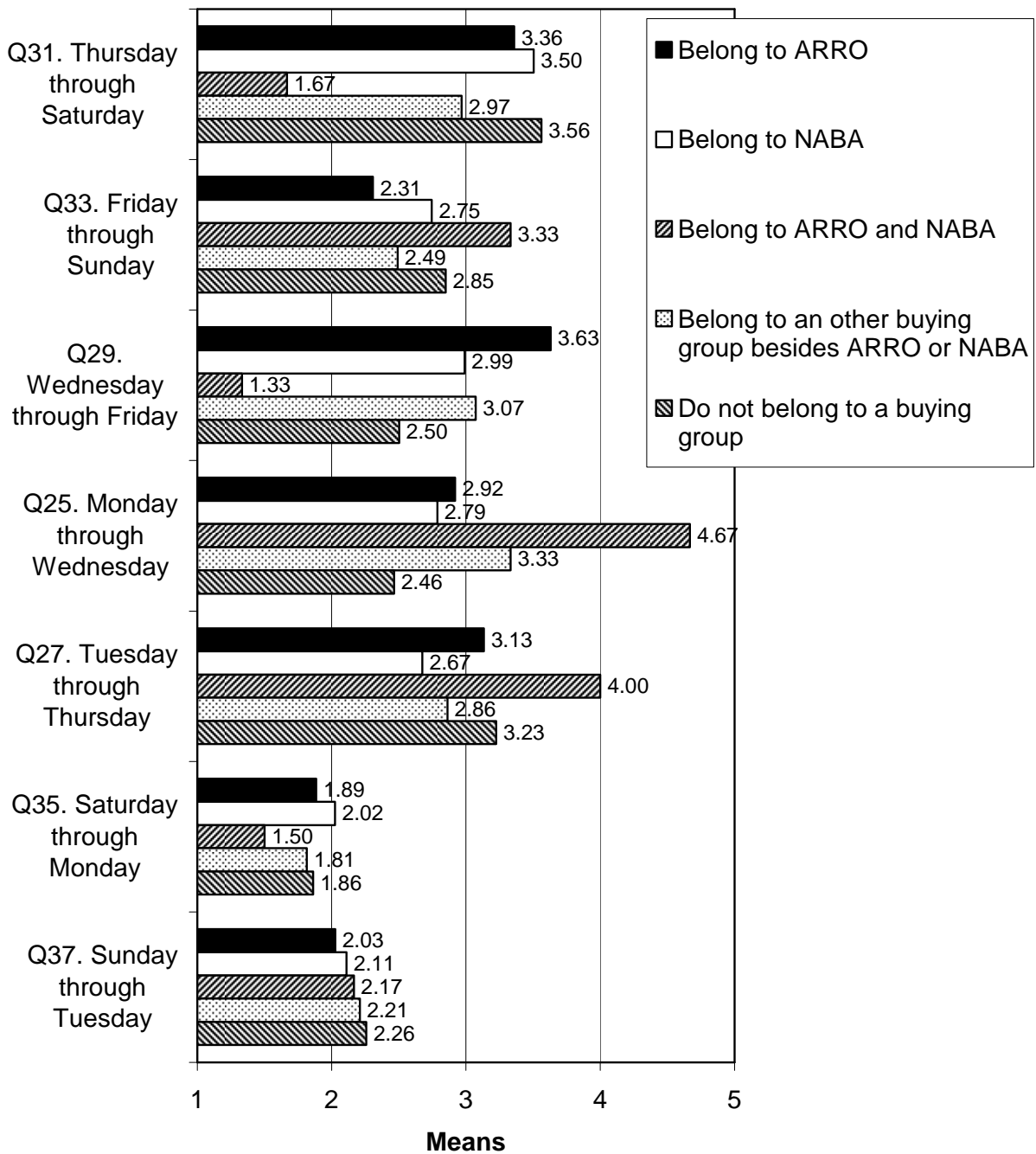
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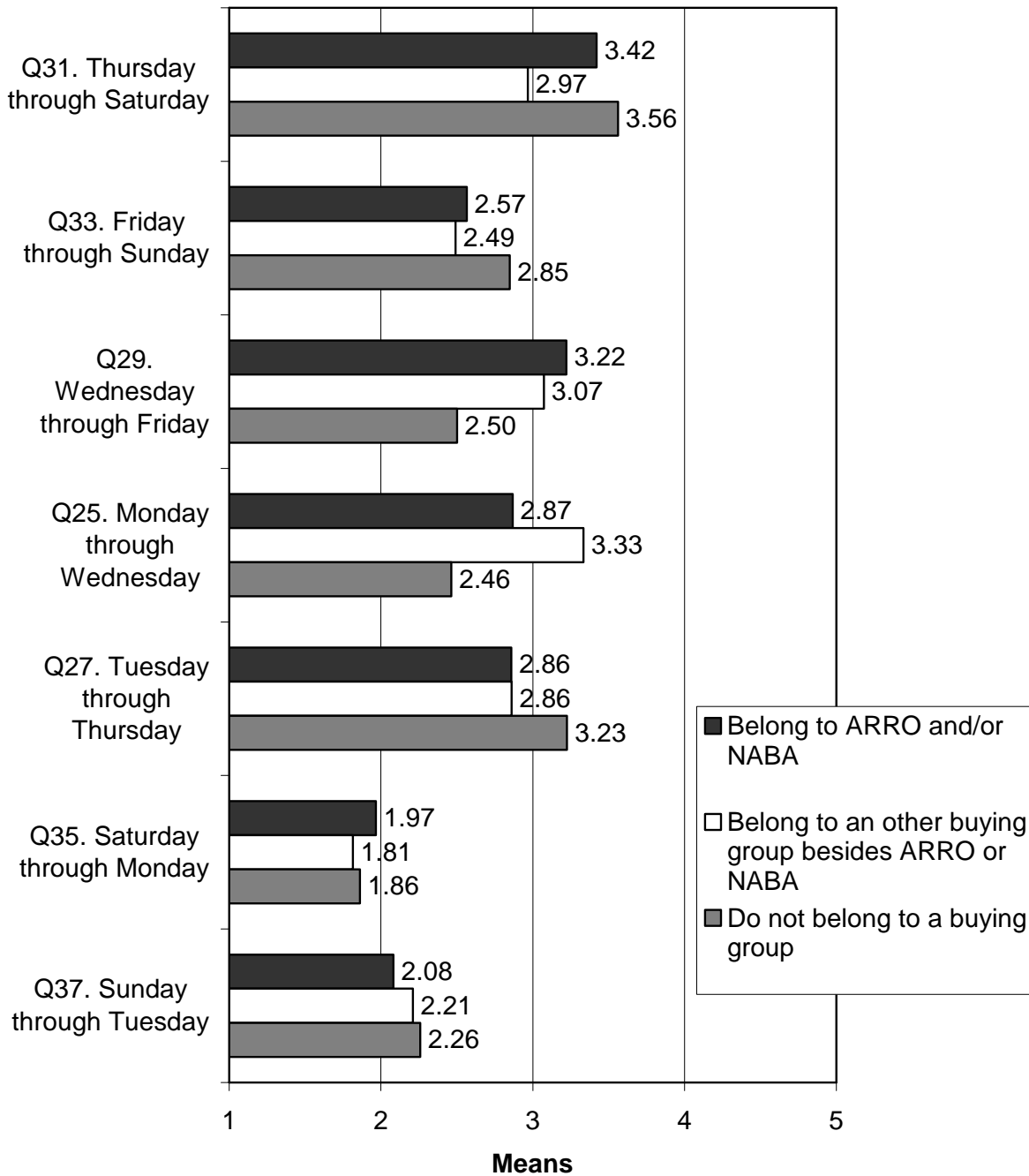
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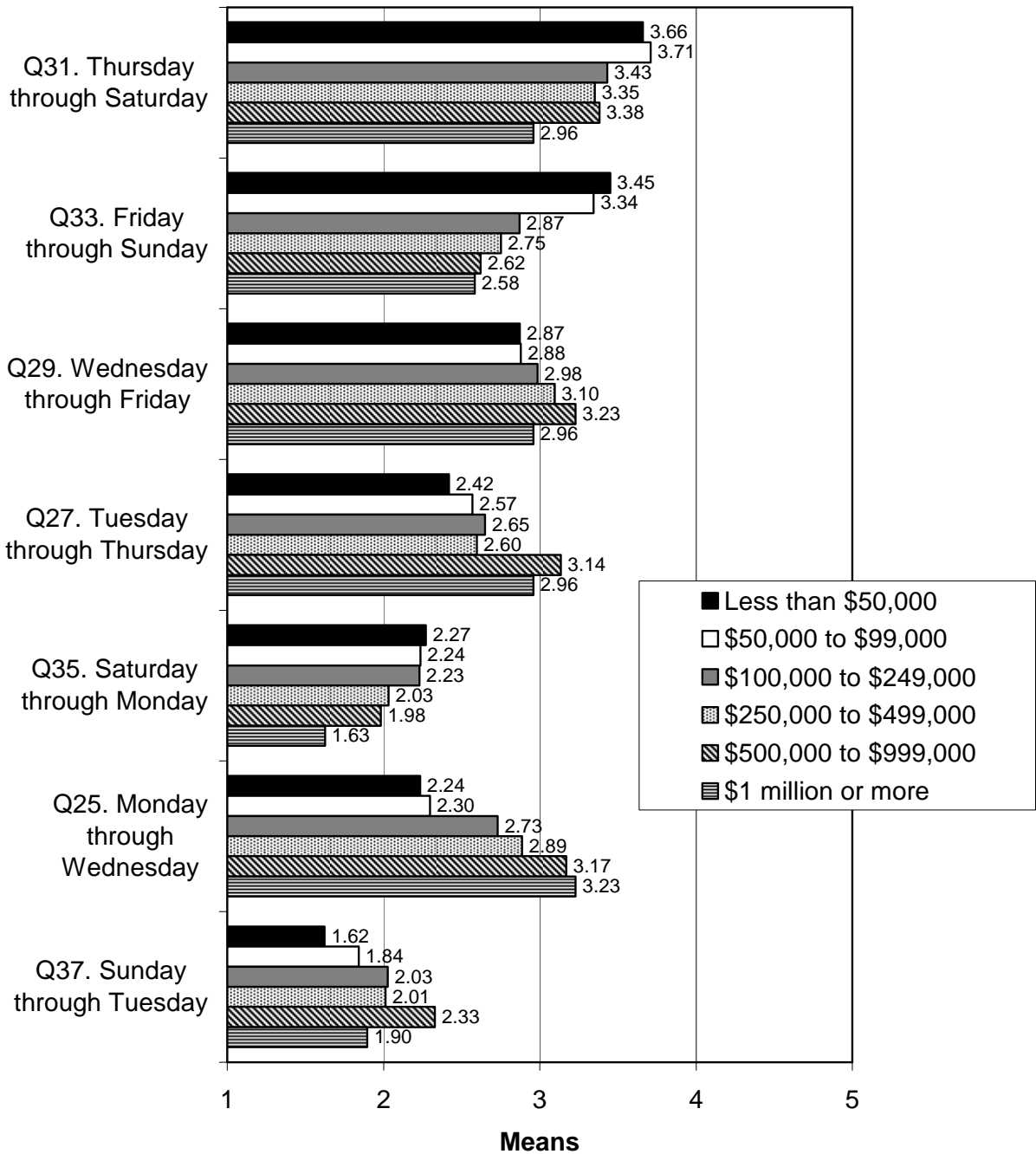
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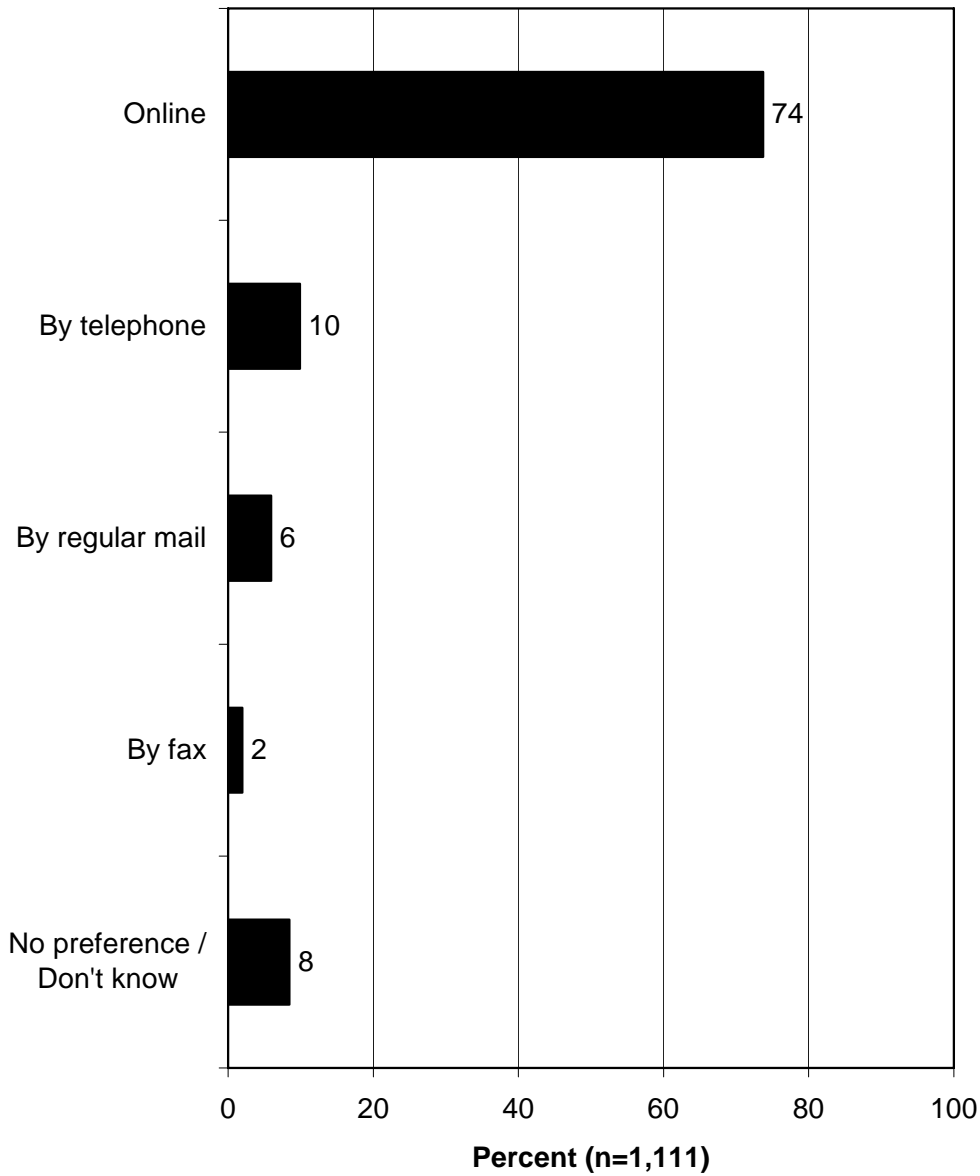


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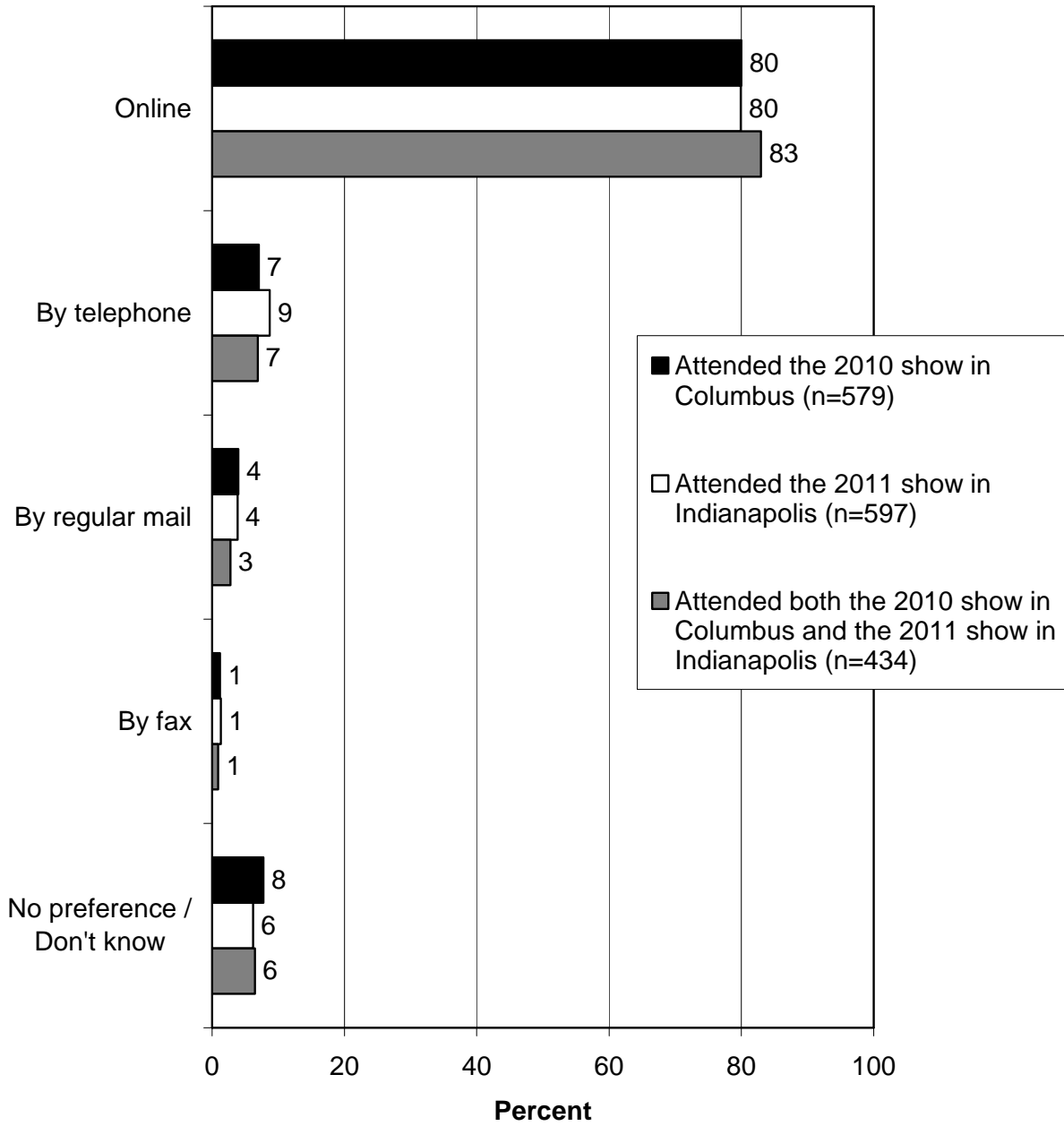


PREFERENCES REGARDING REGISTERING FOR THE TRADE SHOWS AND BEING CONTACTED

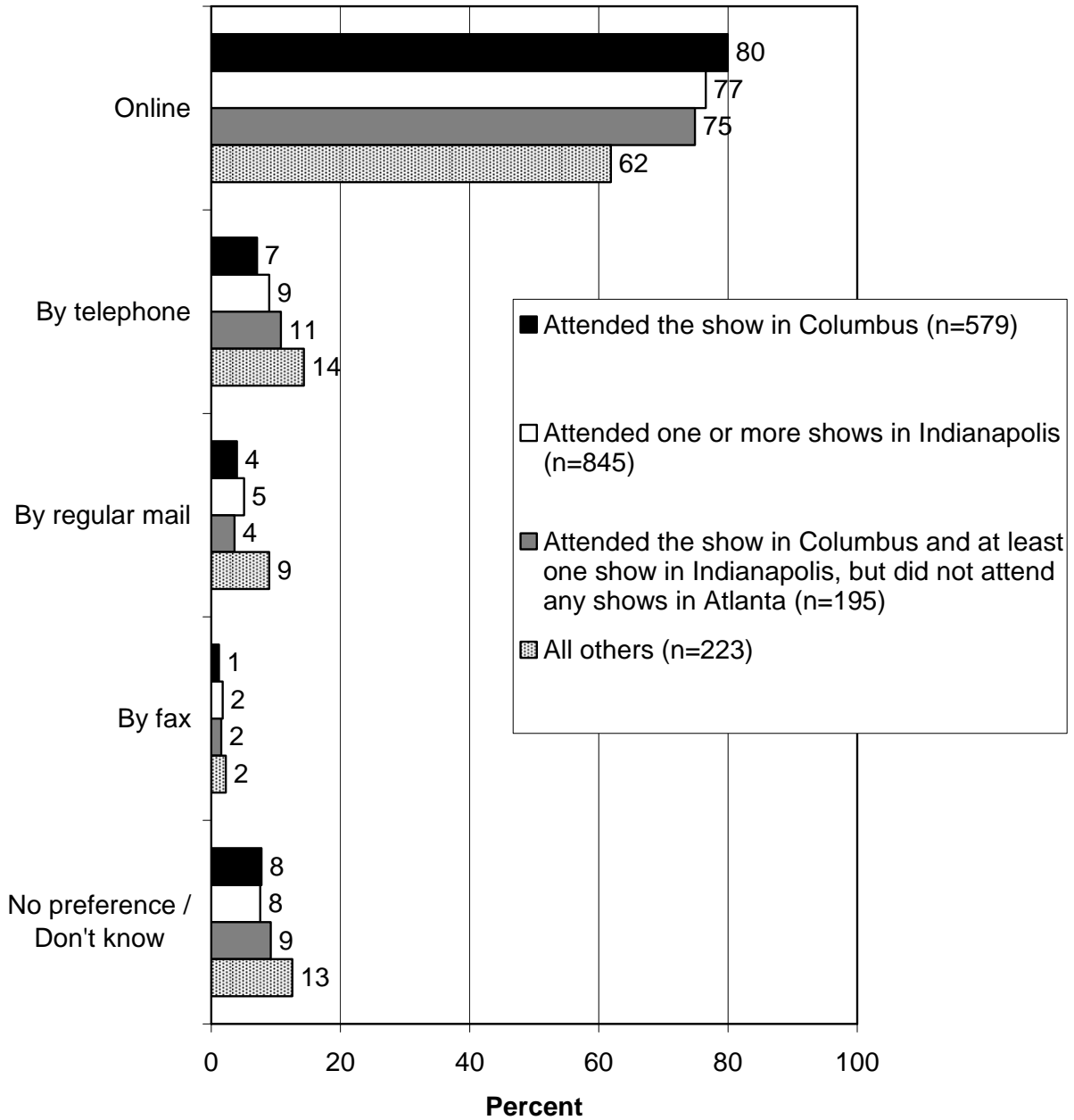
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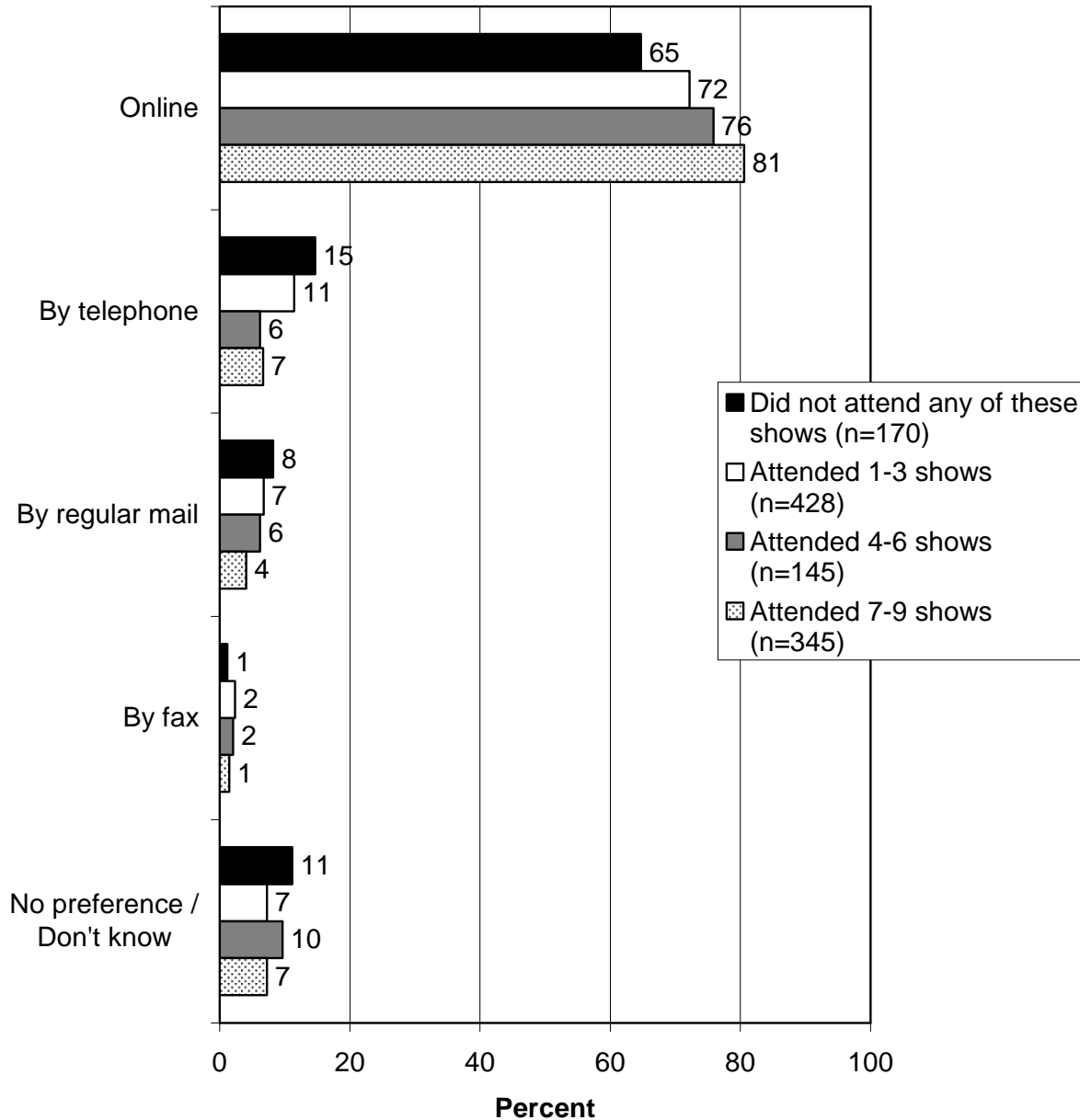
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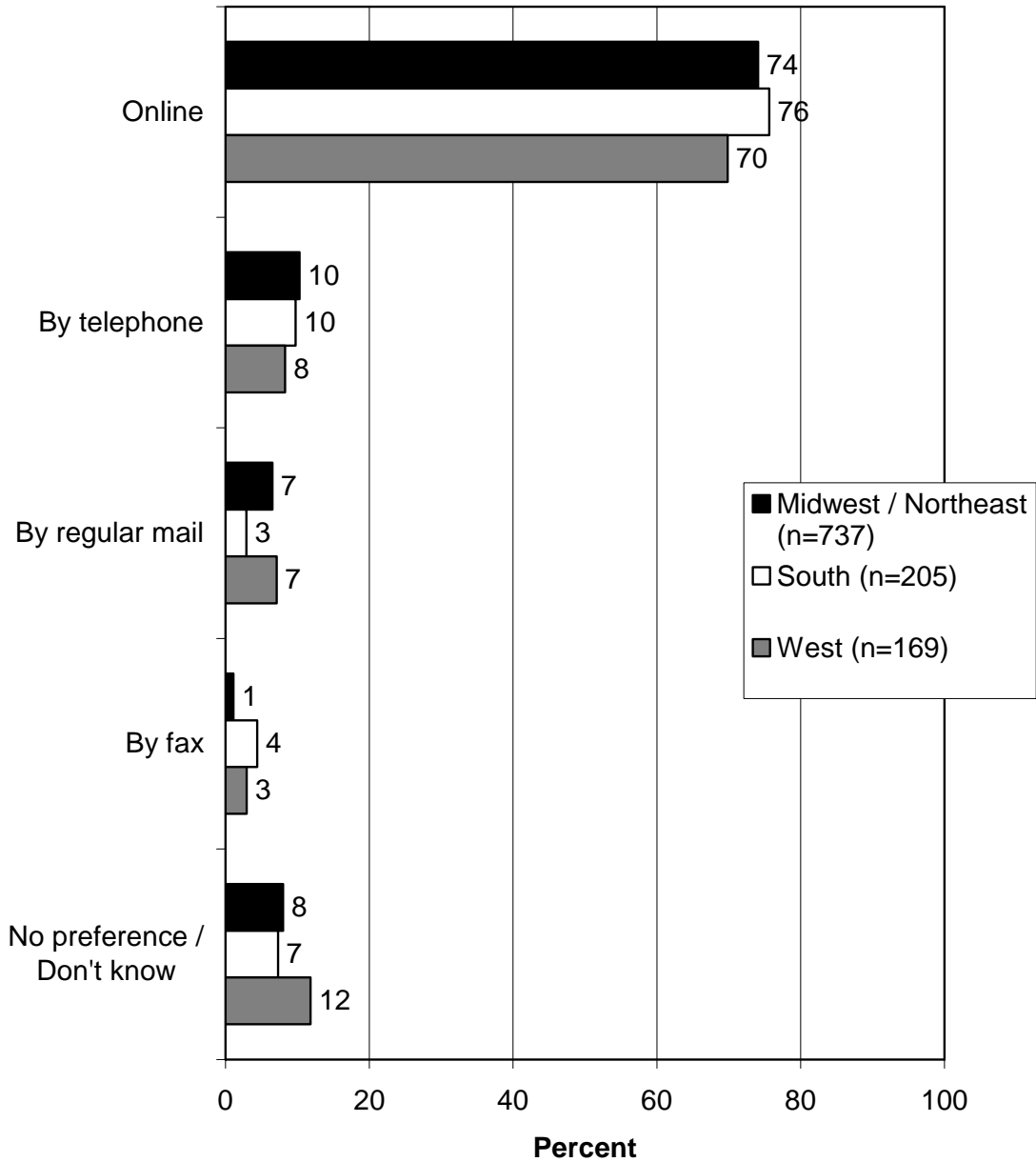
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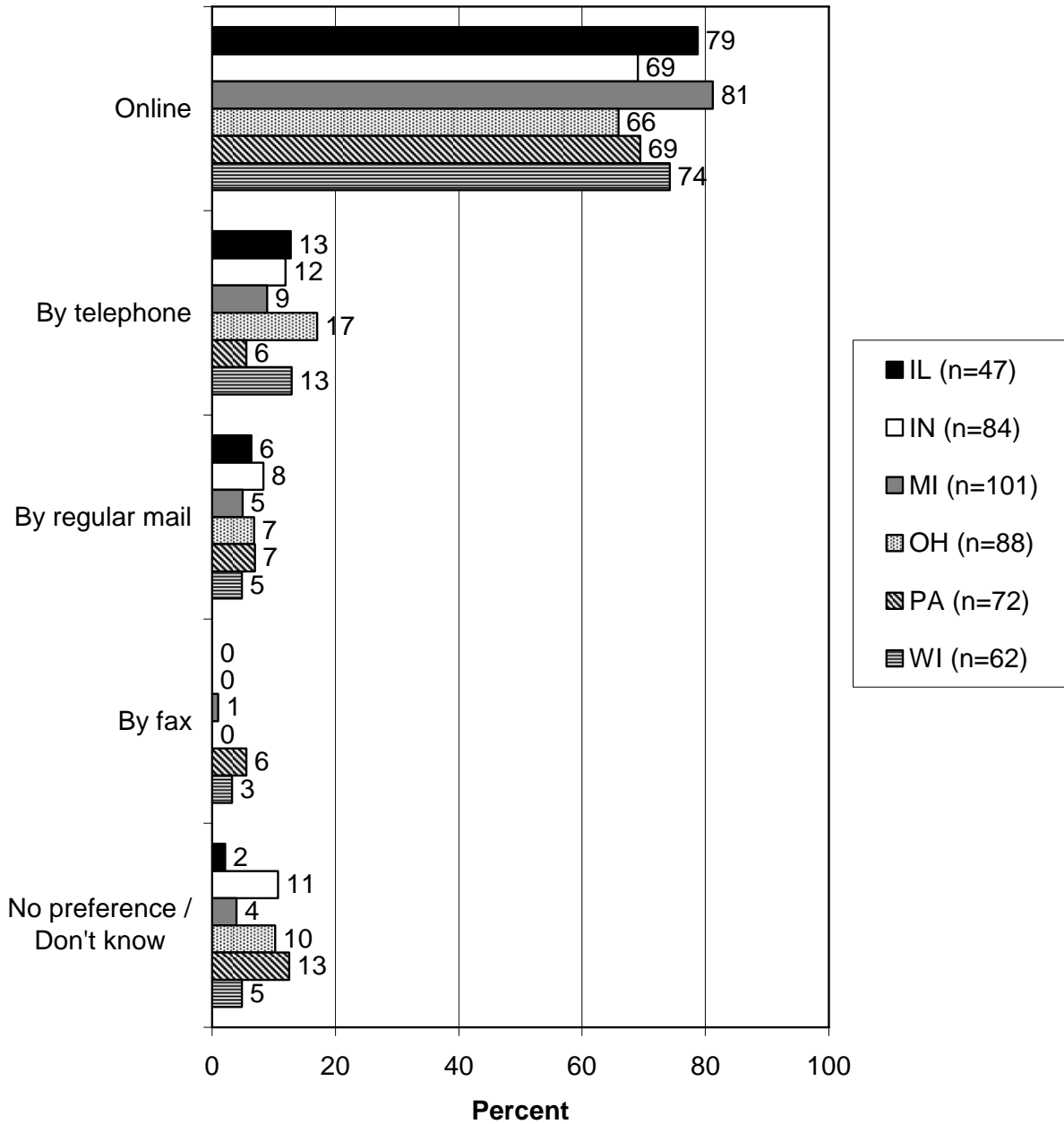
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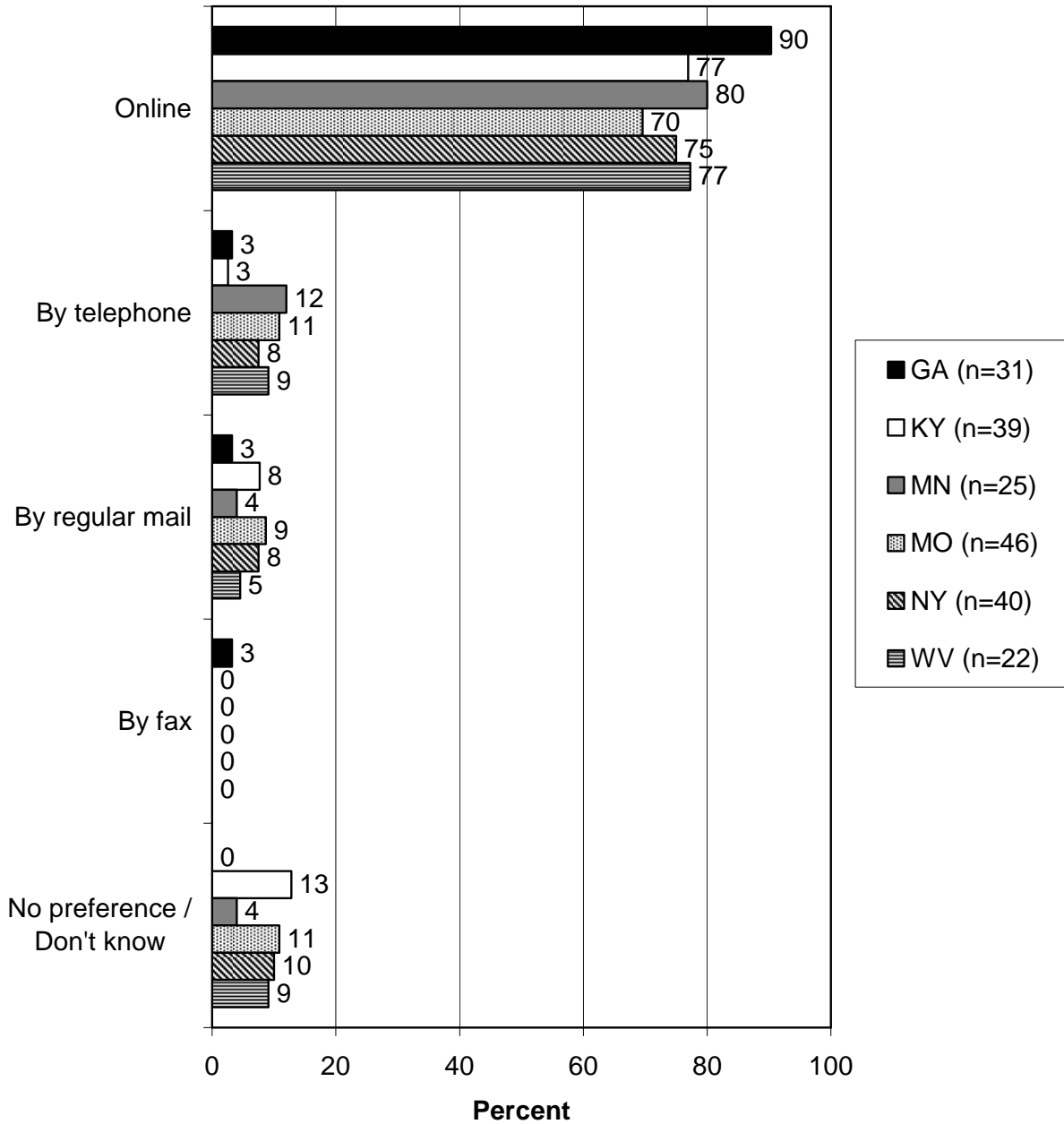
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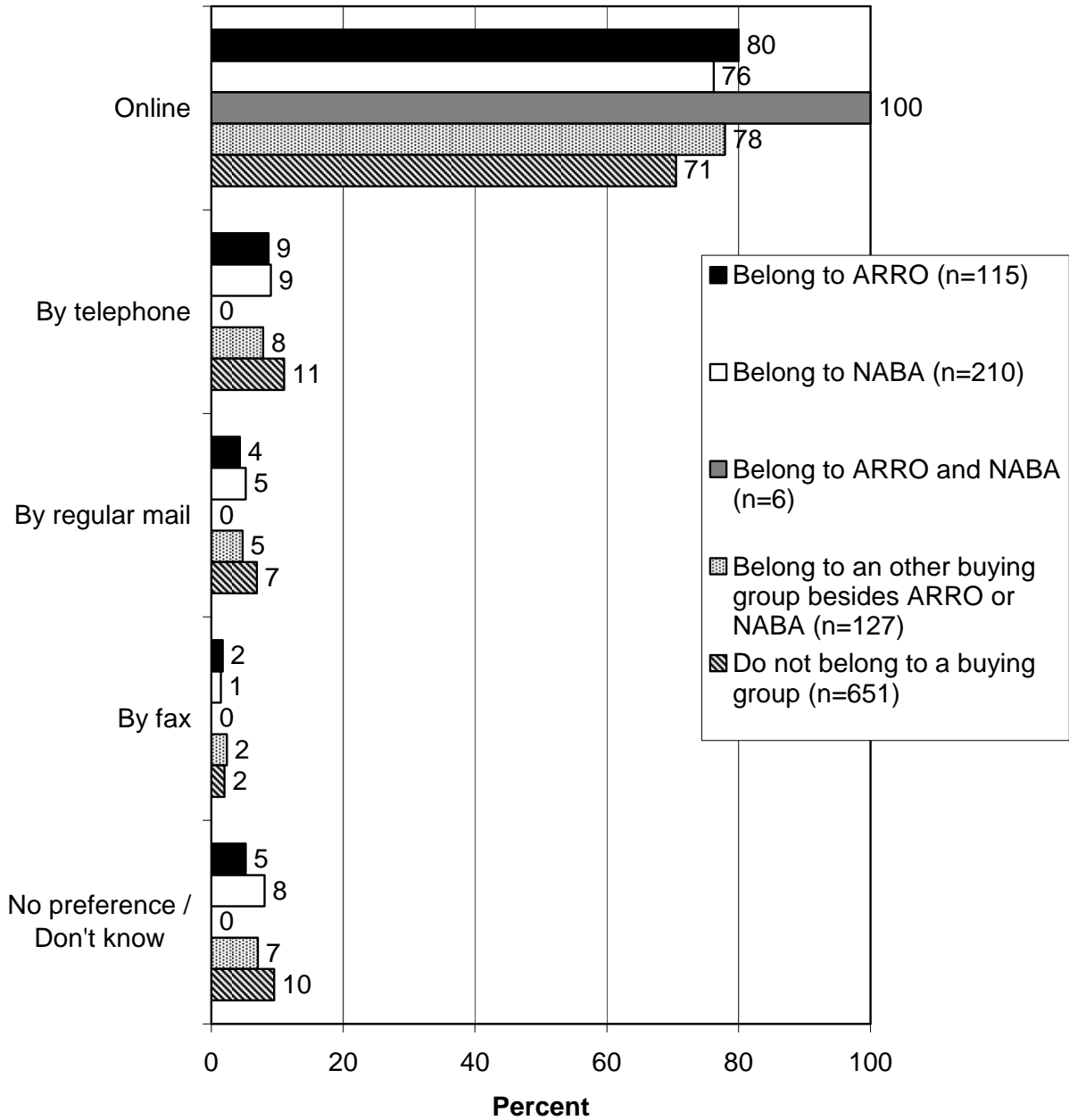
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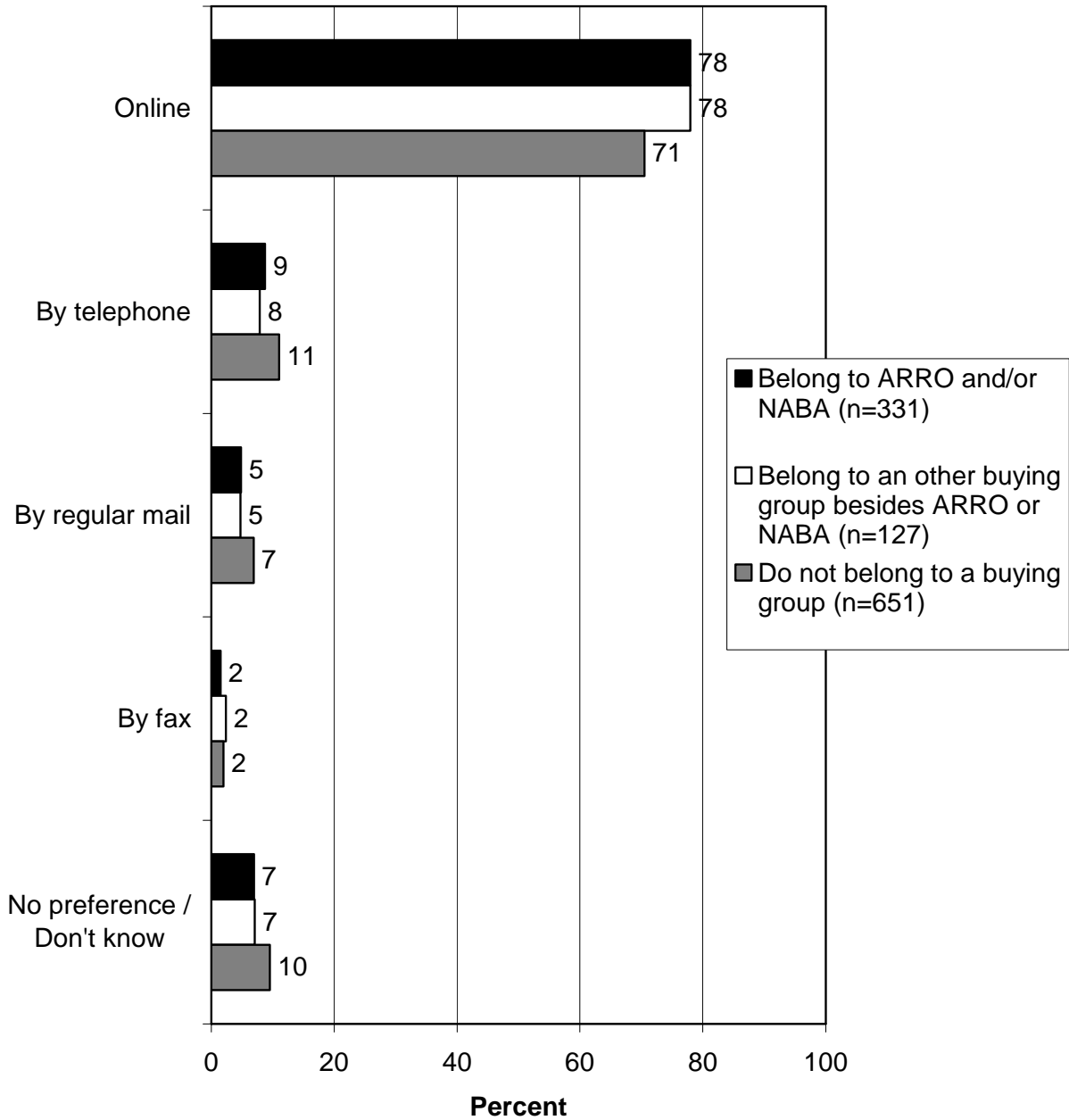
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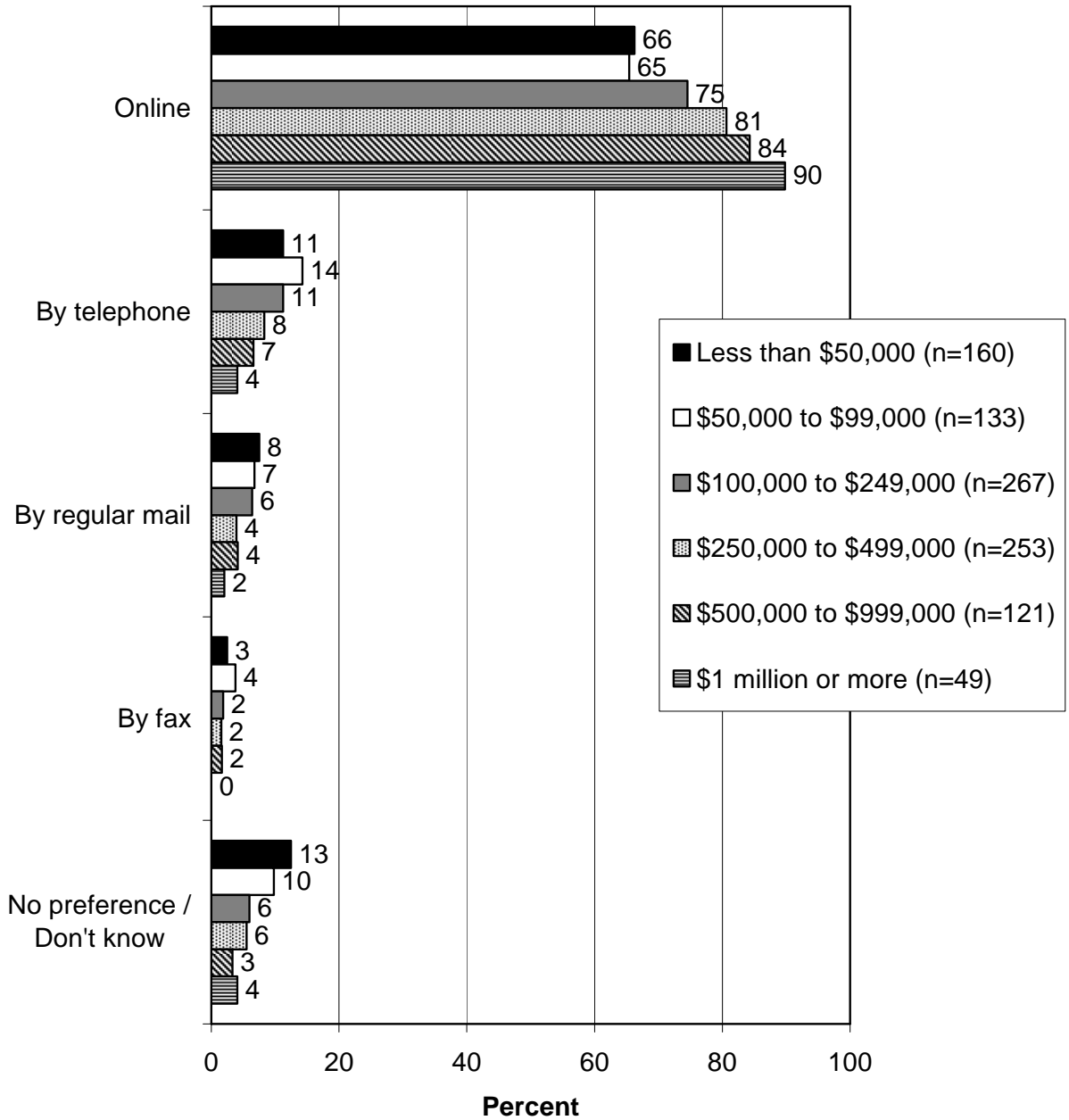
Q58. Which way would you most prefer to register for the ATA Trade Show?



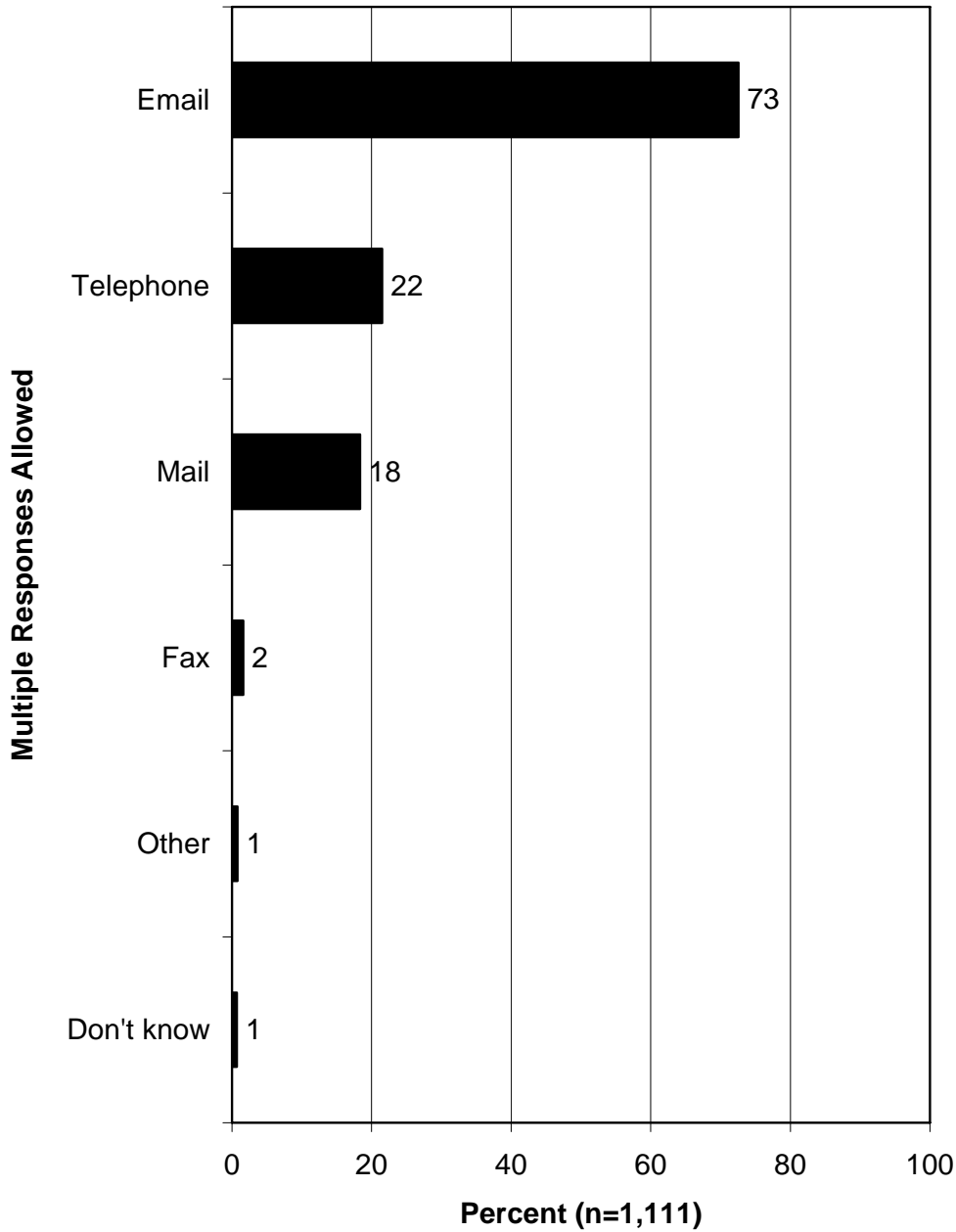
Q58. Which way would you most prefer to register for the ATA Trade Show?



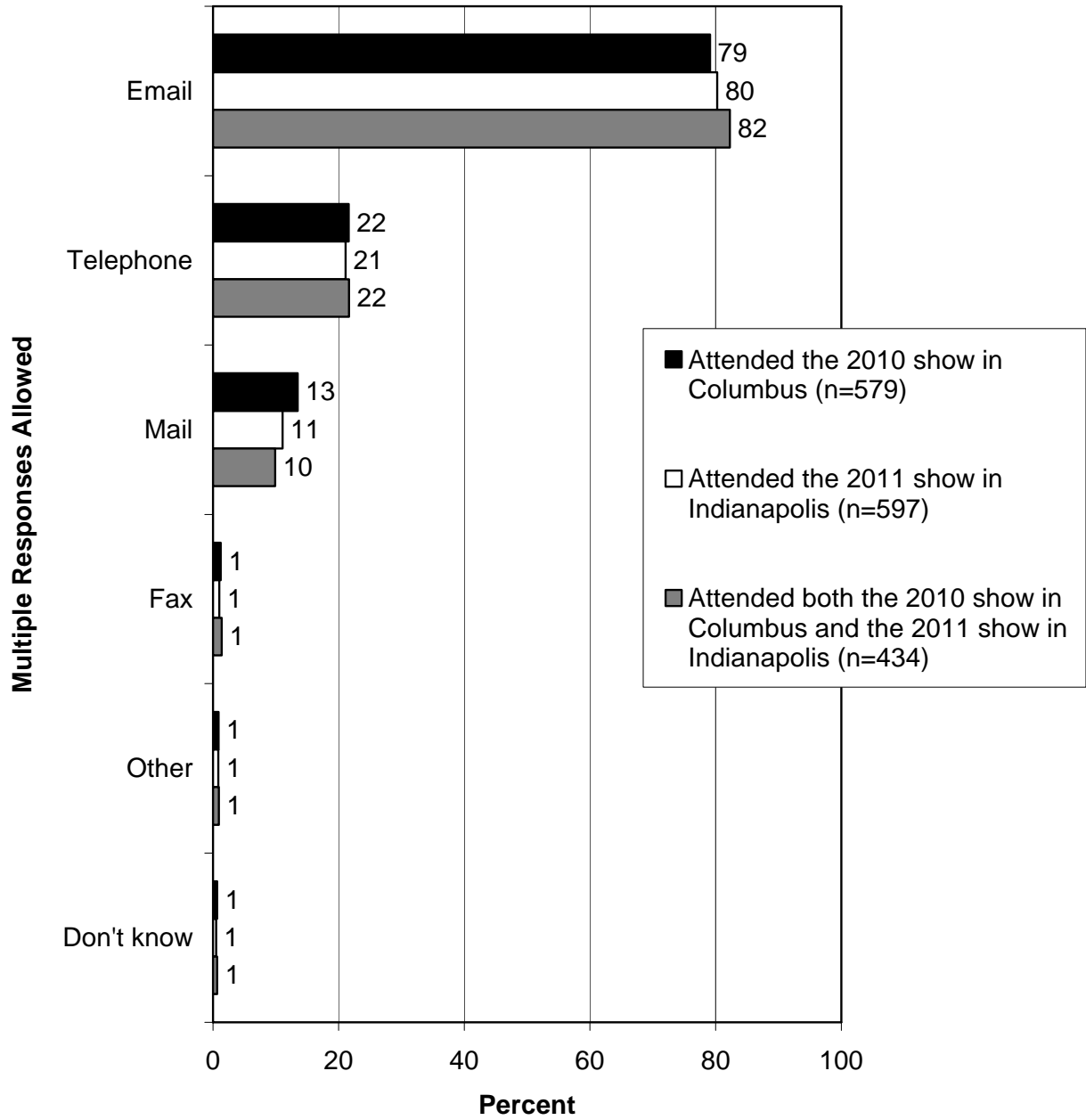
Q58. Which way would you most prefer to register for the ATA Trade Show?



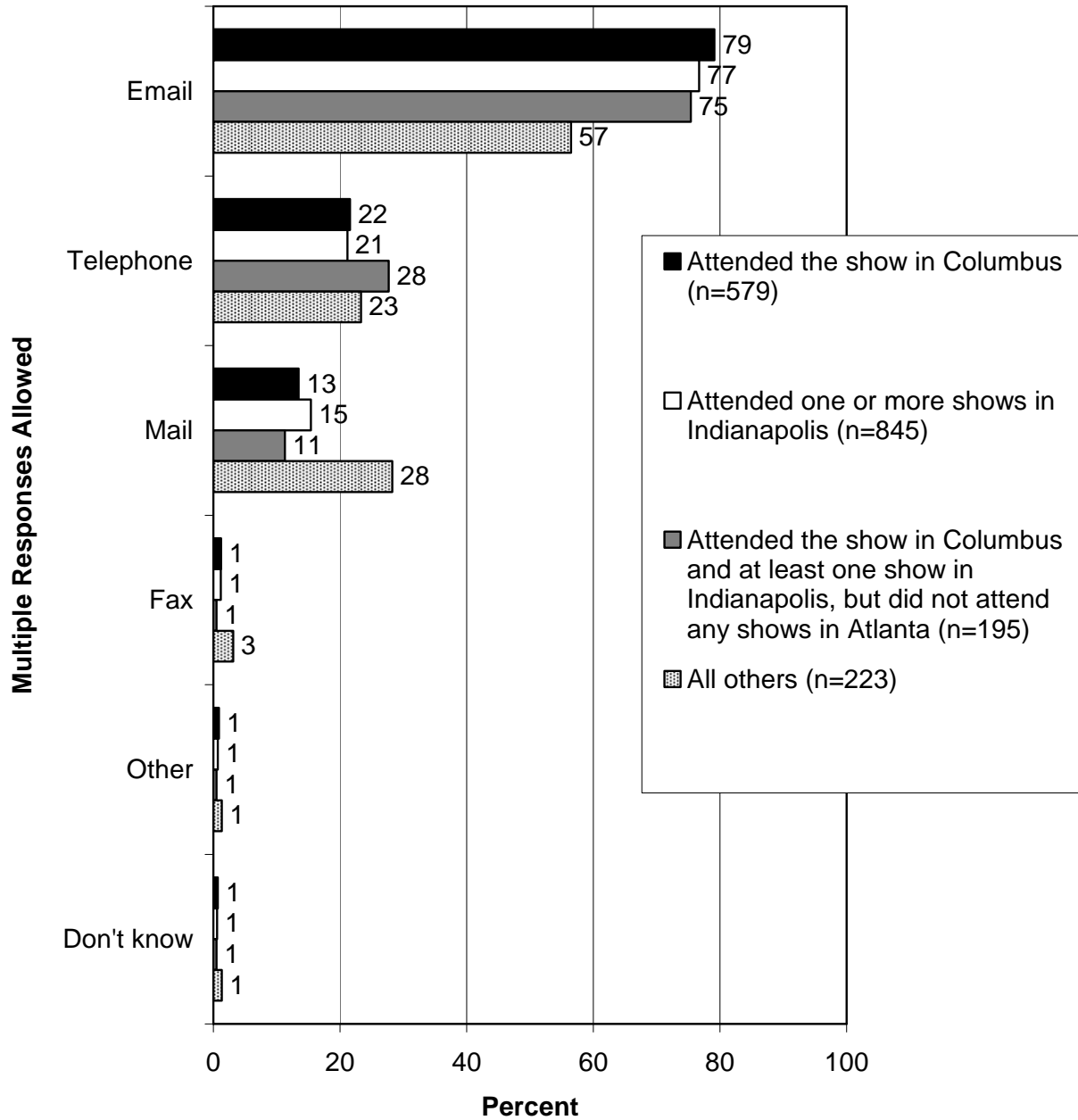
Q76. What is the best way for the ATA to reach you with information about the Trade Show?



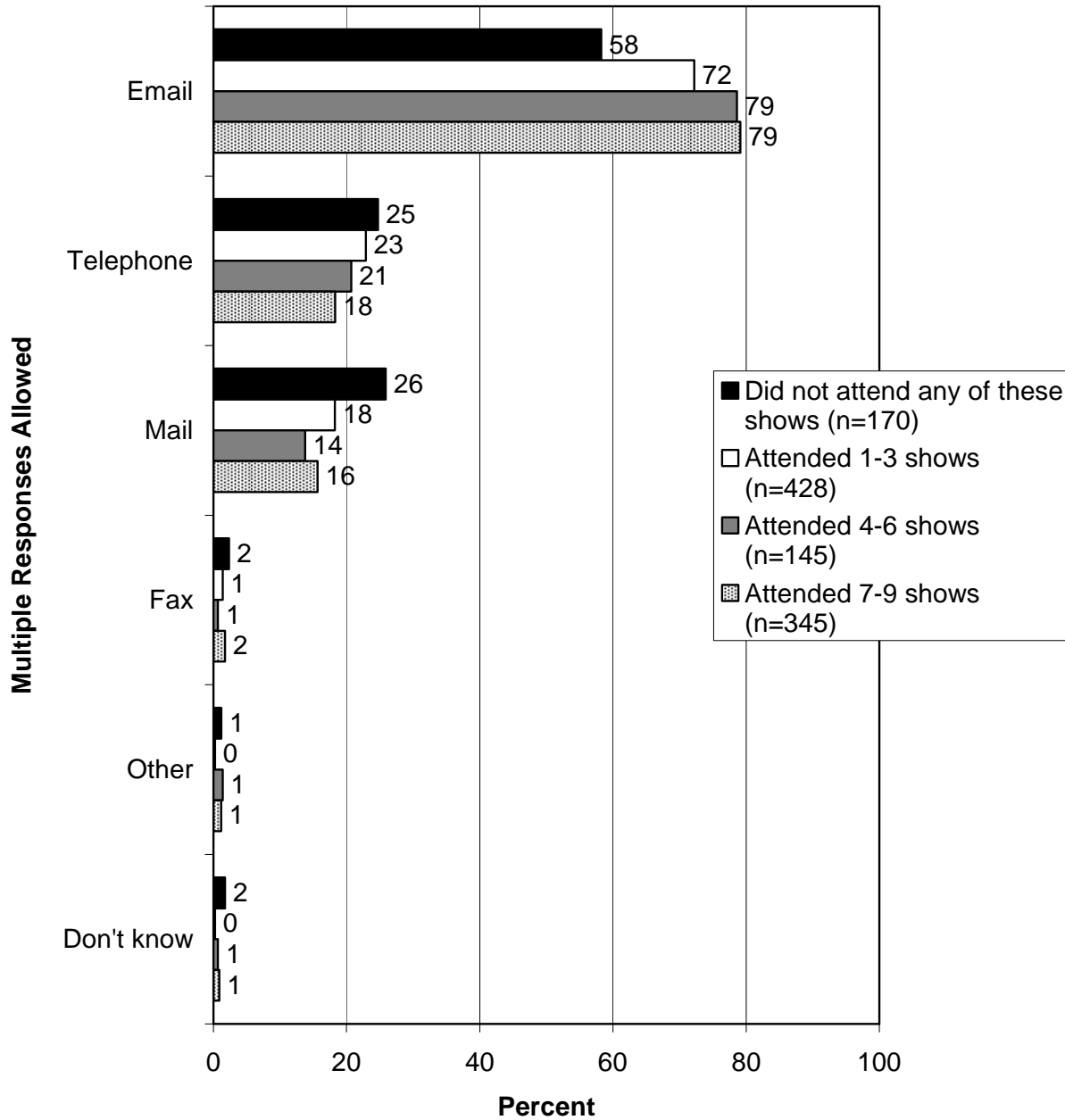
Q76. What is the best way for the ATA to reach you with information about the Trade Show?



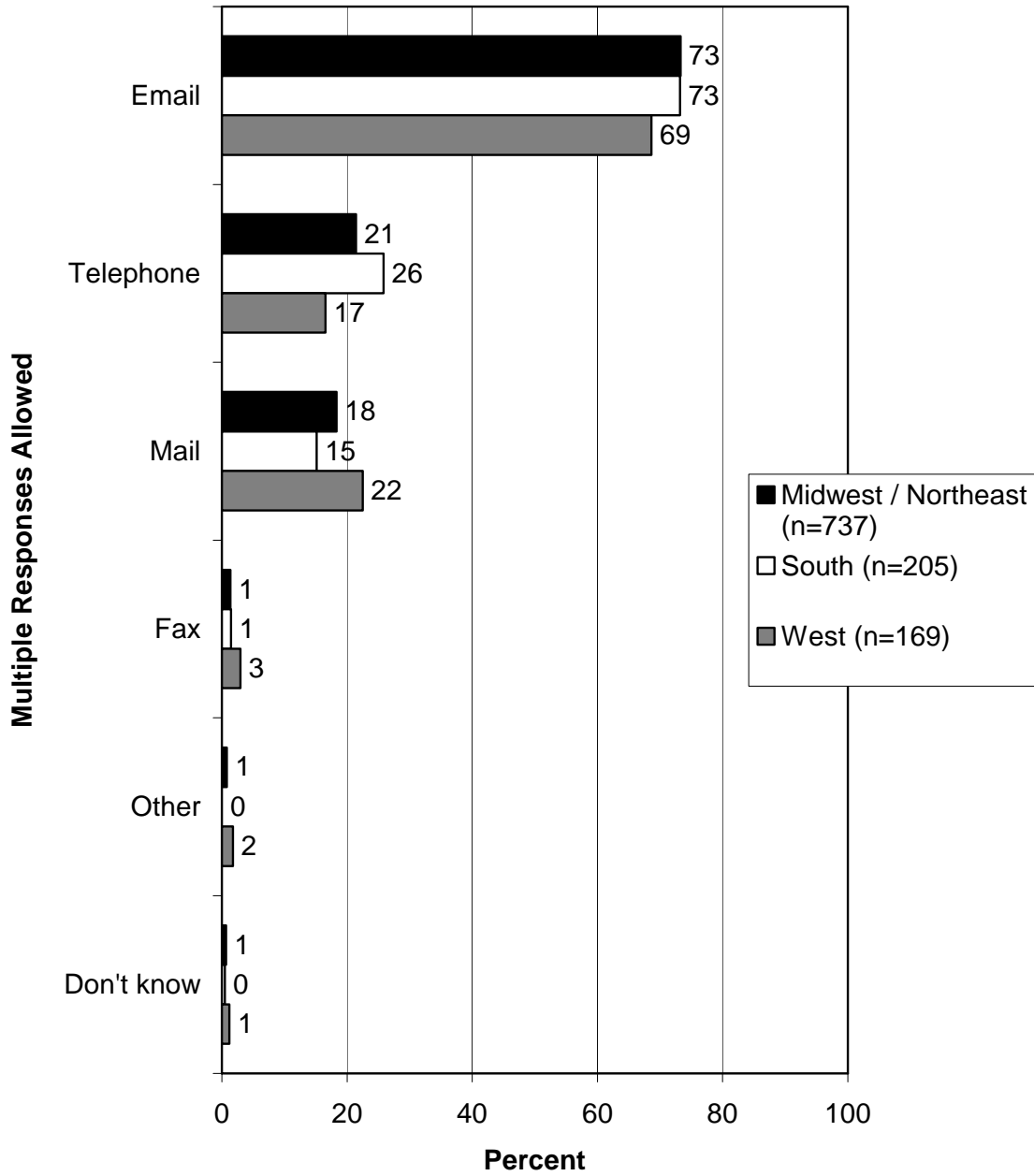
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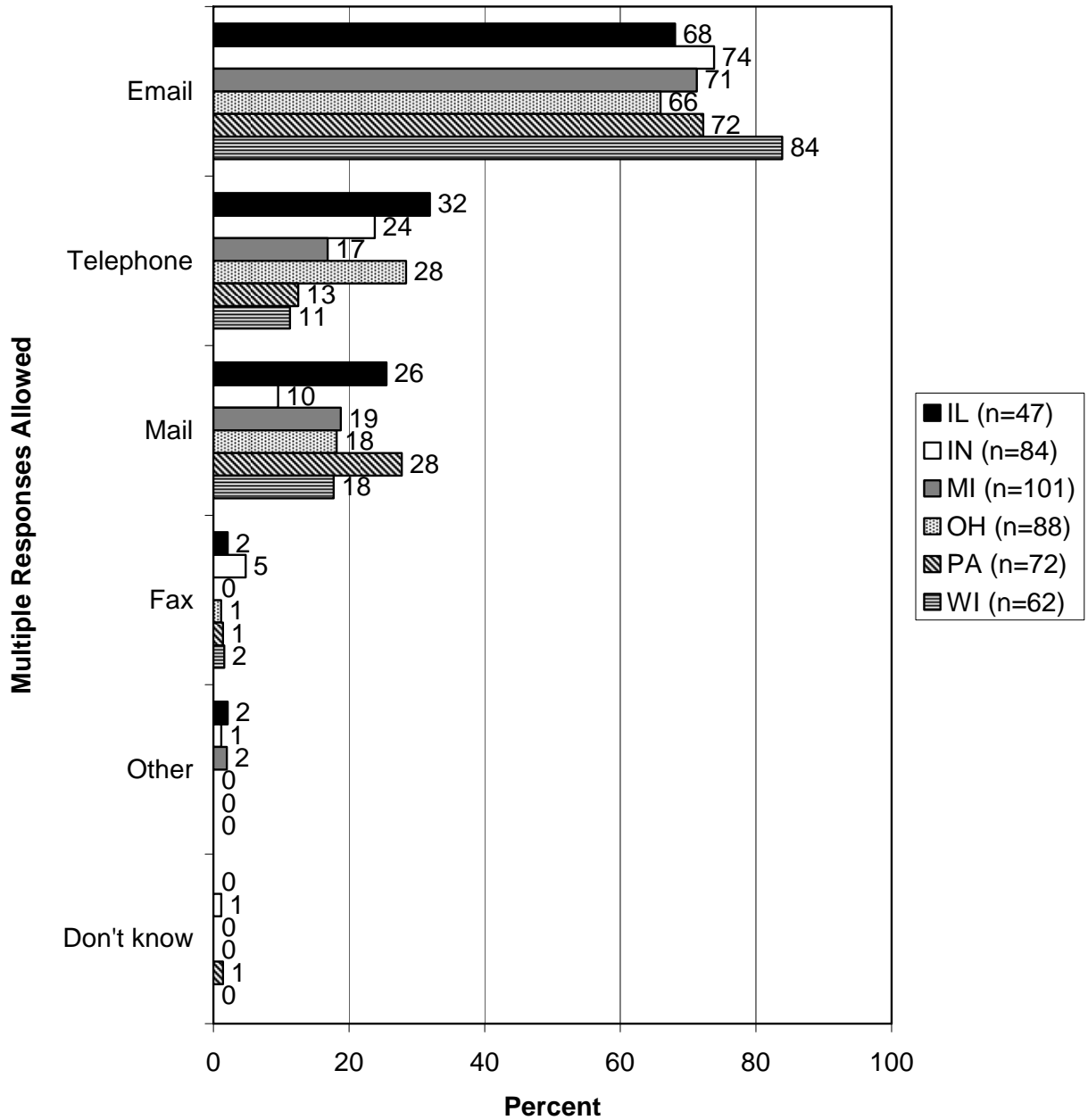
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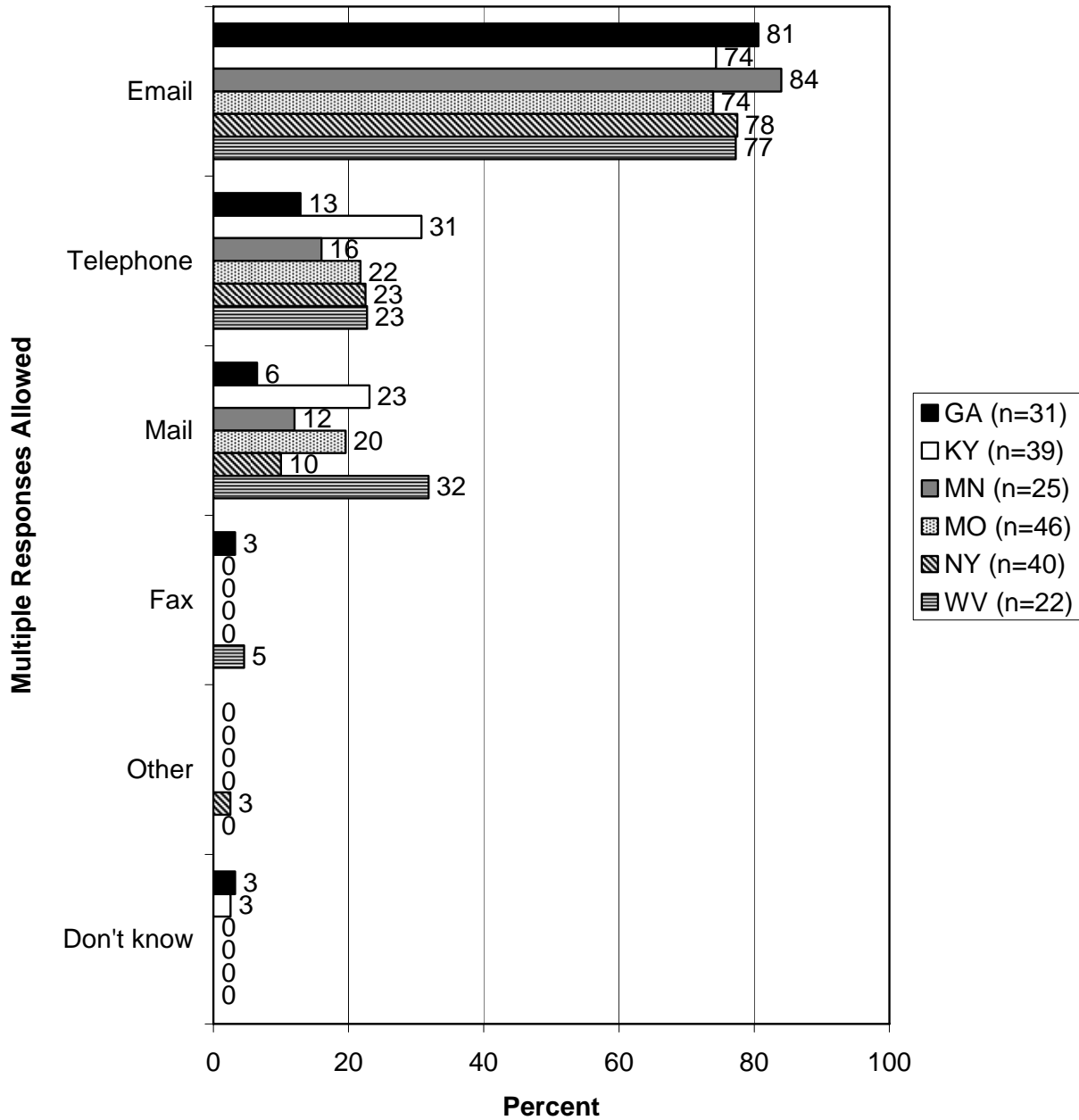
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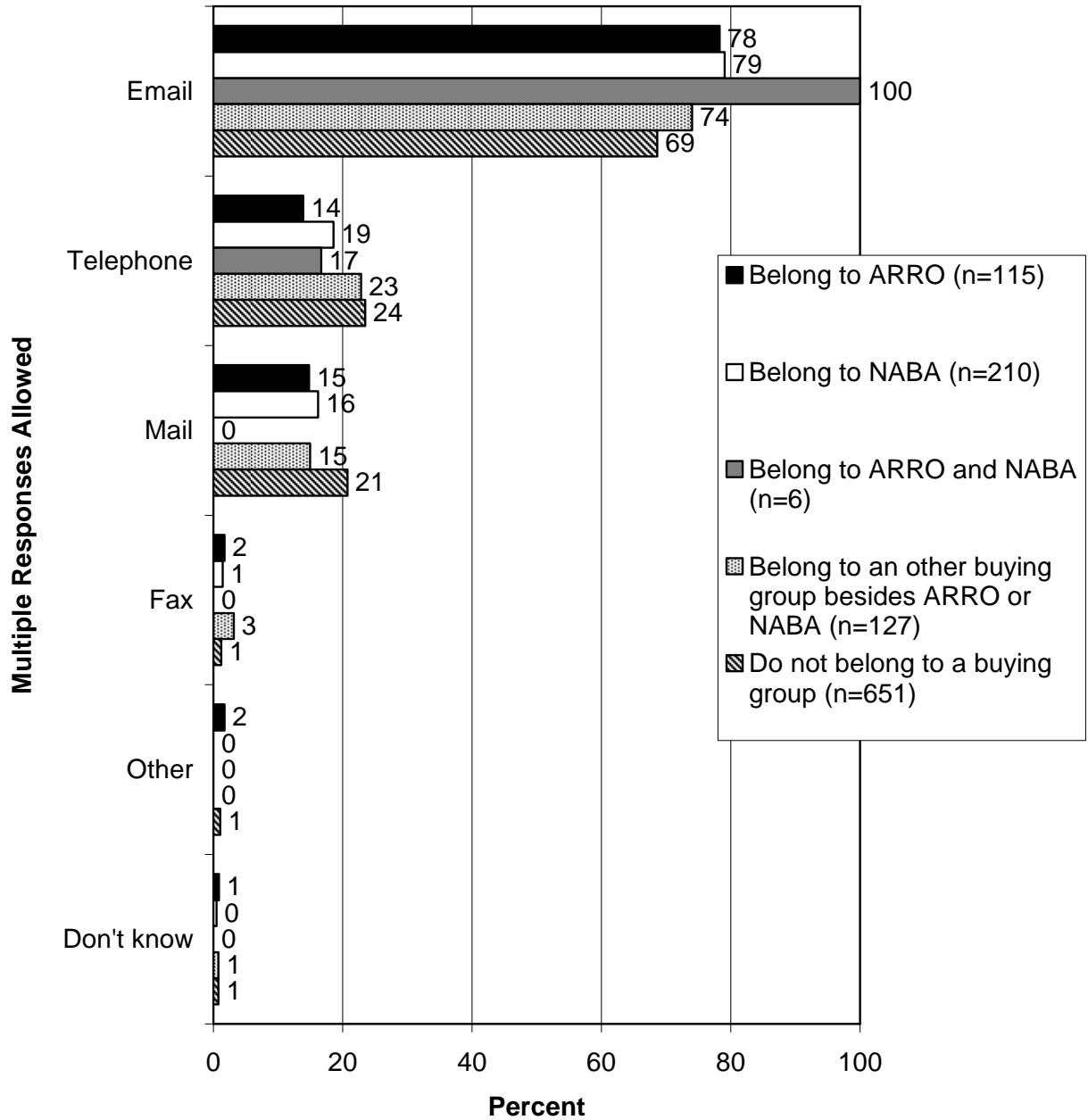
**Q76. What is the best way for the ATA to reach you with information about the Trade Show?
(Top 6 of 12 states with a large number of stores)**



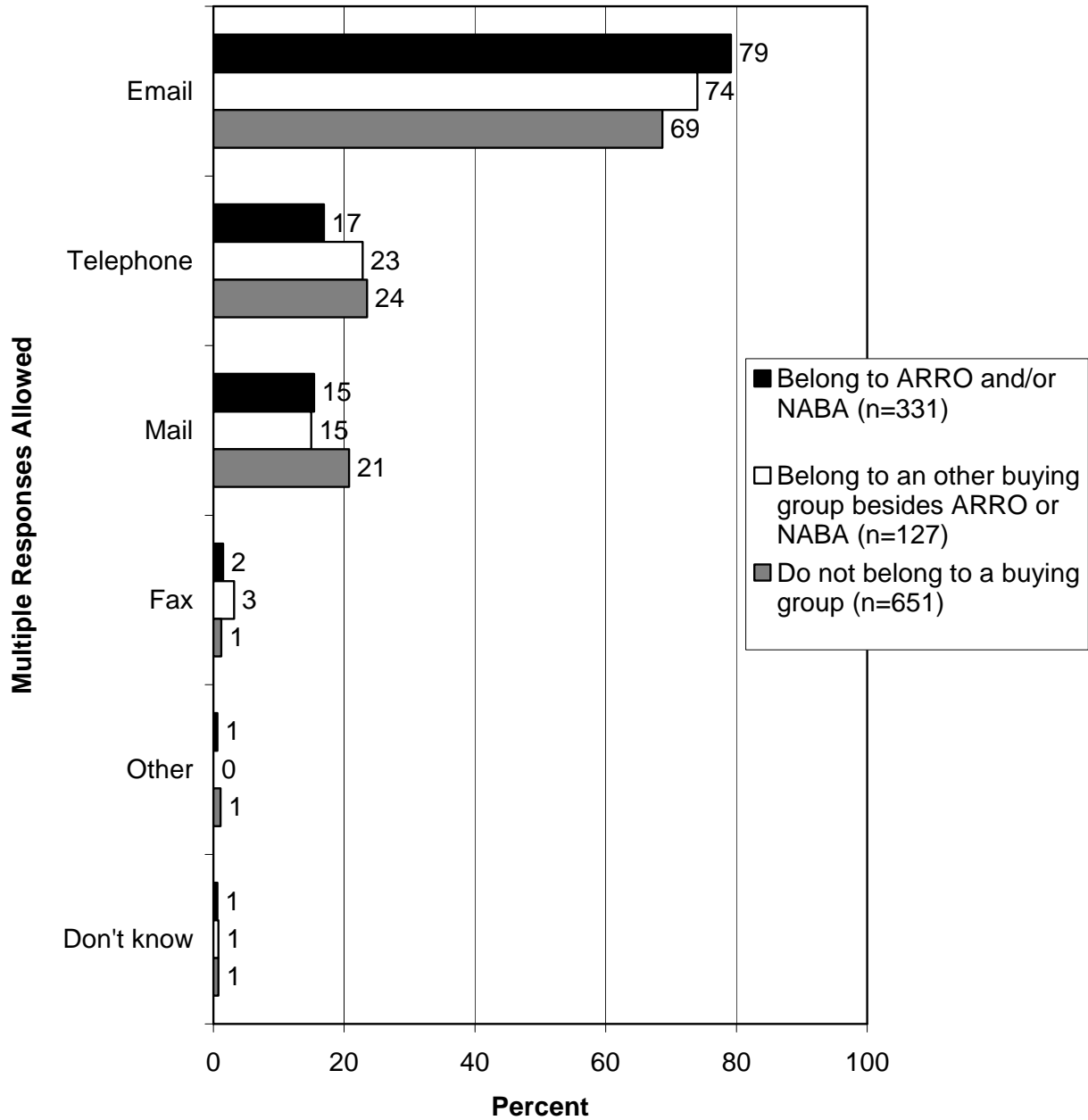
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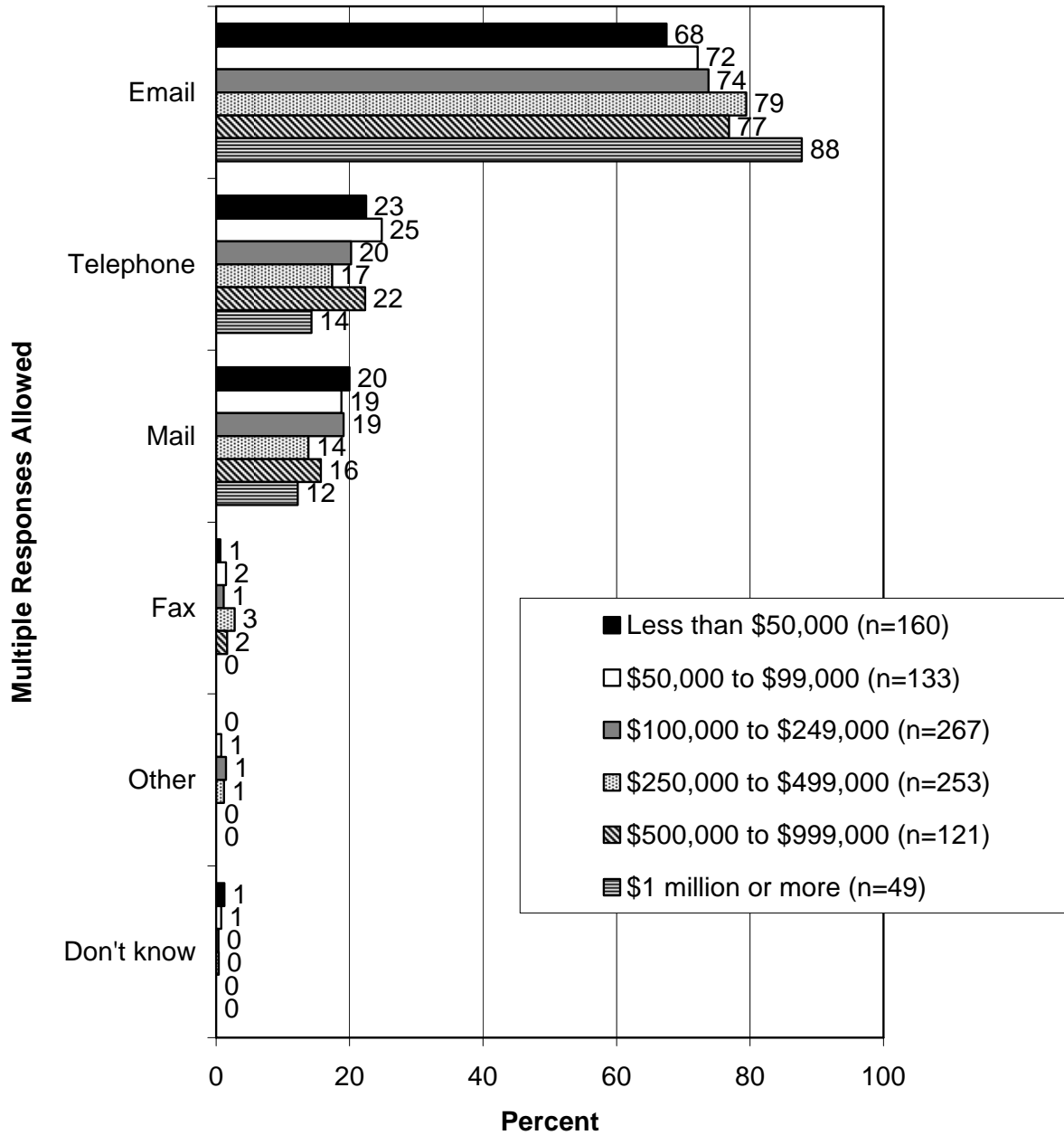
Q76. What is the best way for the ATA to reach you with information about the Trade Show?



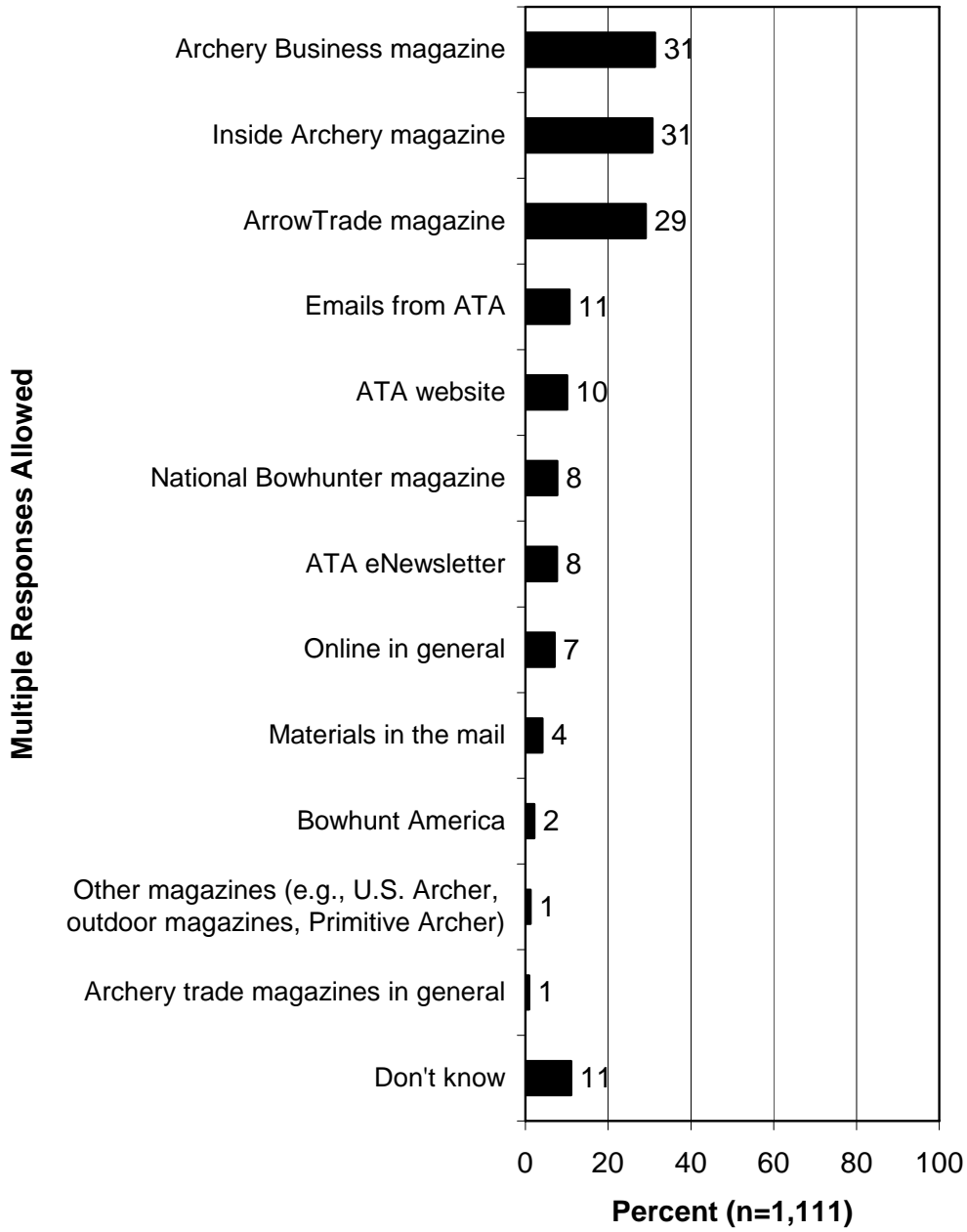
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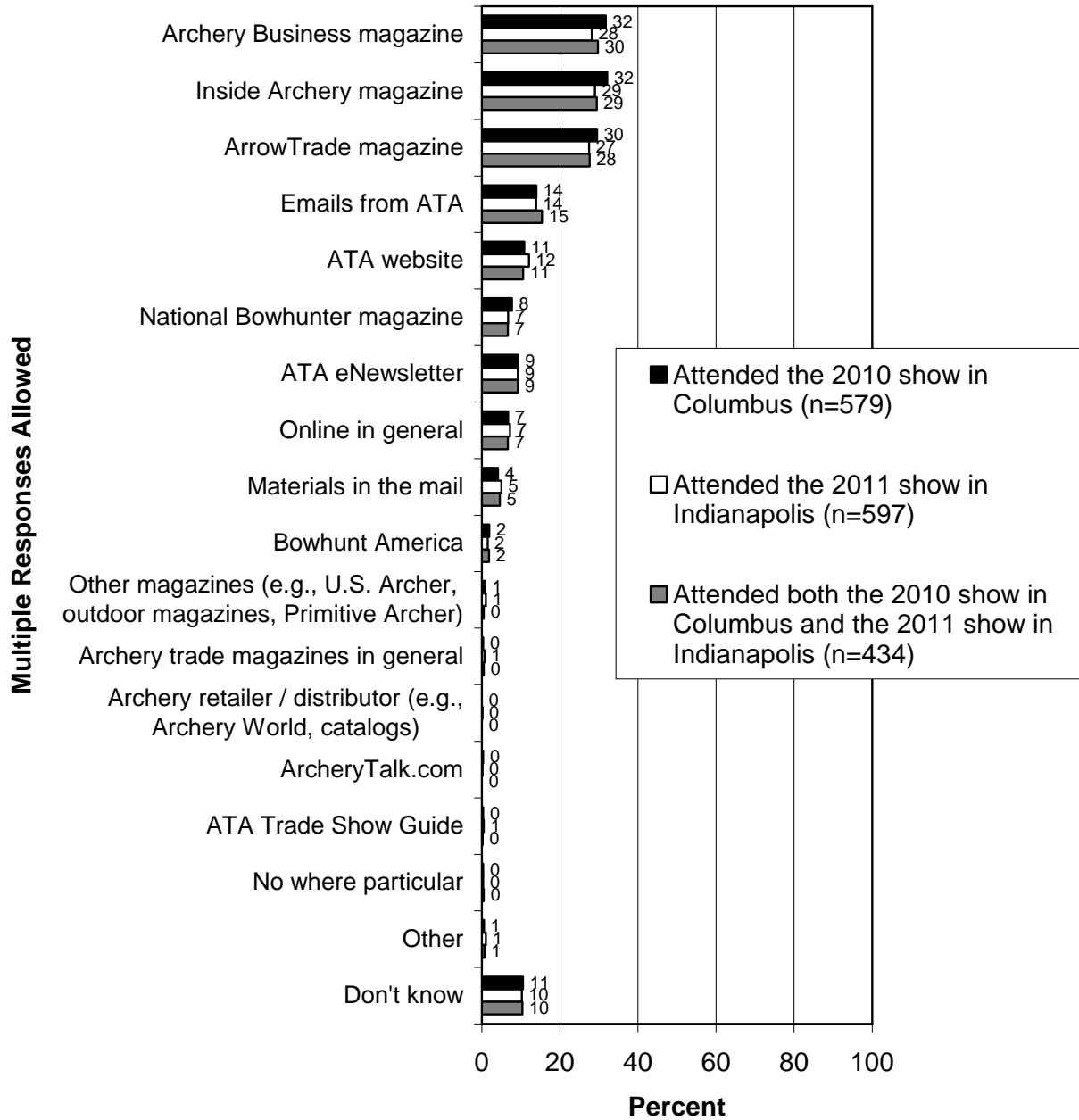
Q76. What is the best way for the ATA to reach you with information about the Trade Show?



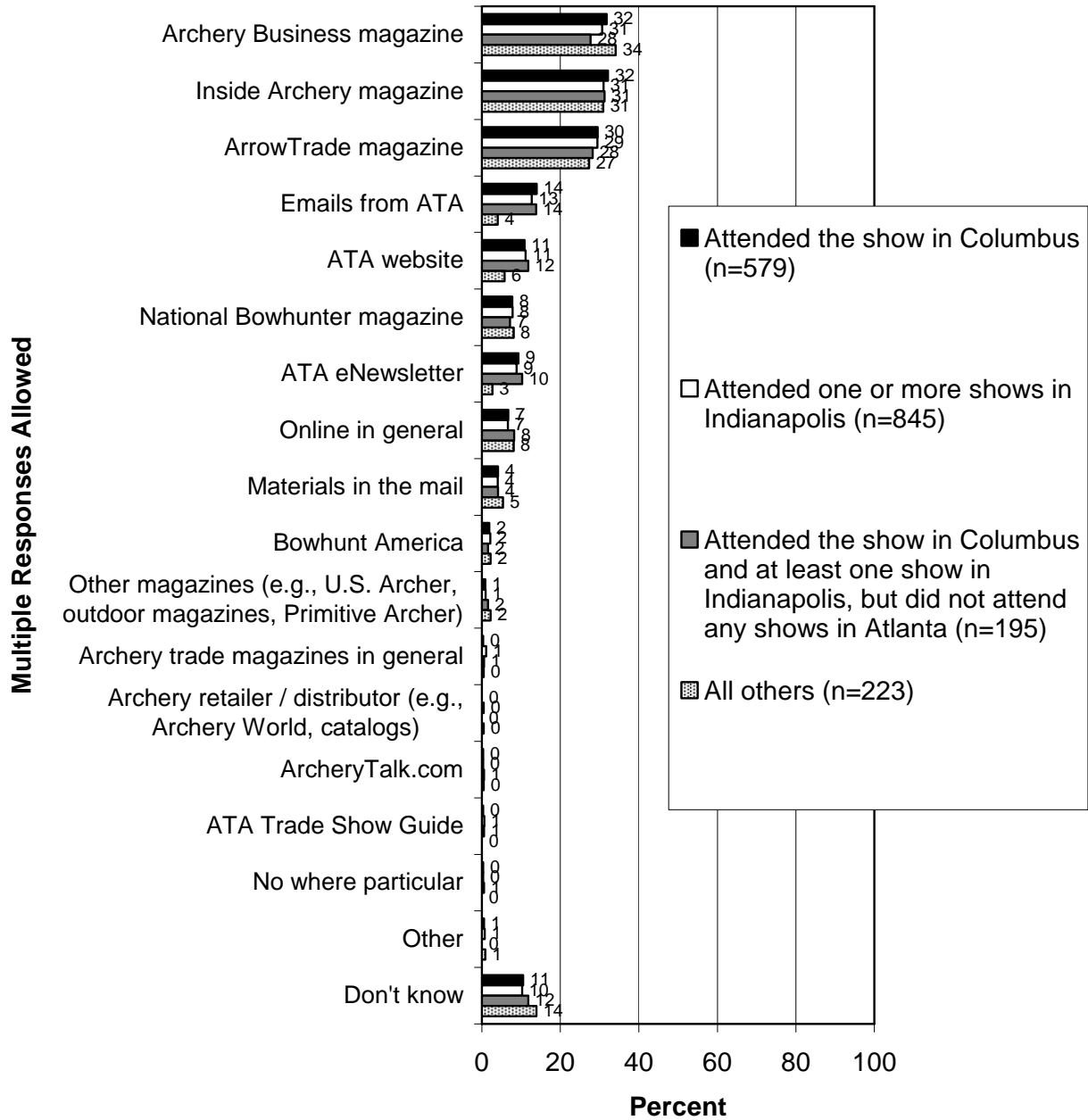
Q41. Where do you like to read about the ATA Trade Show?



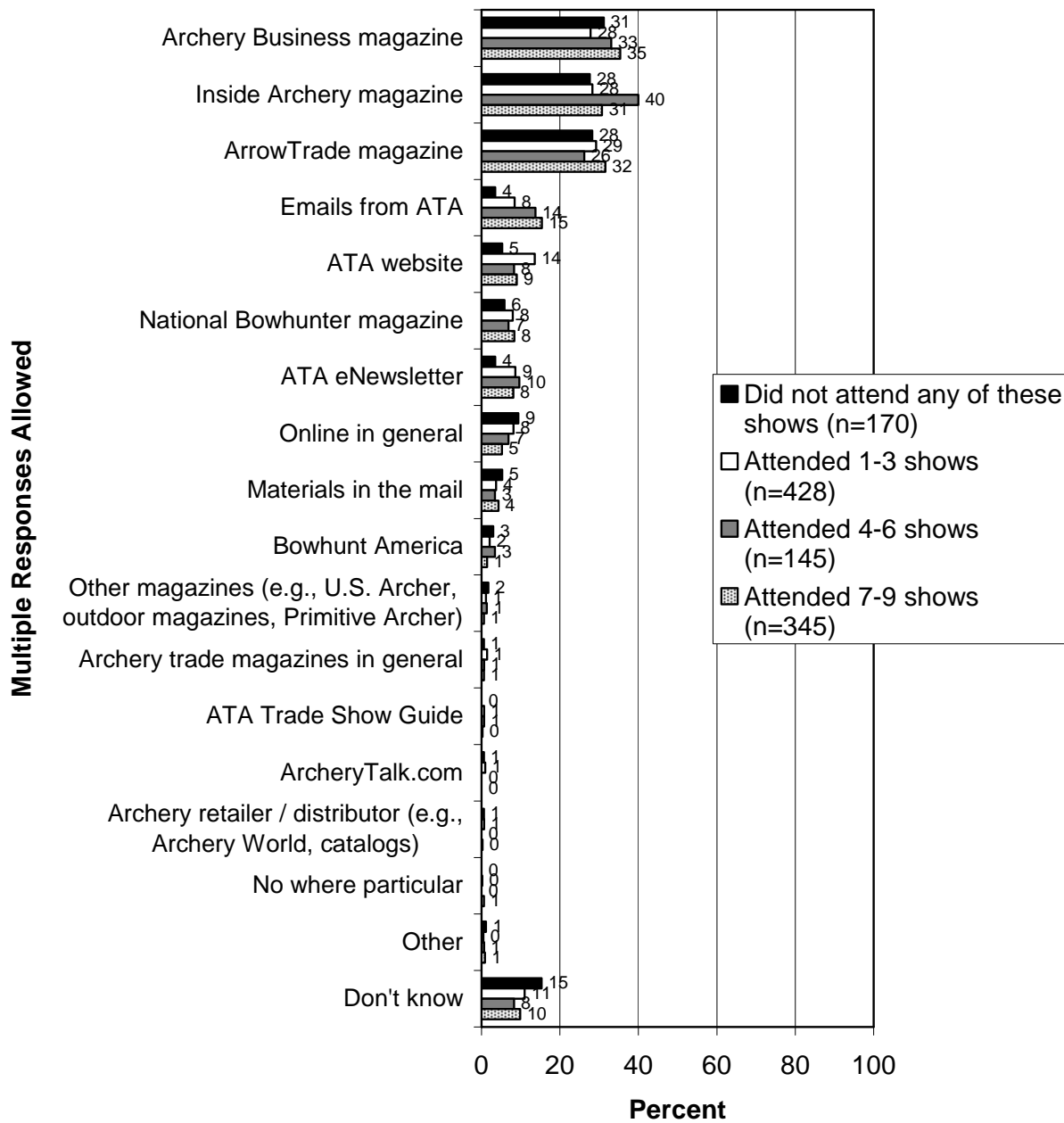
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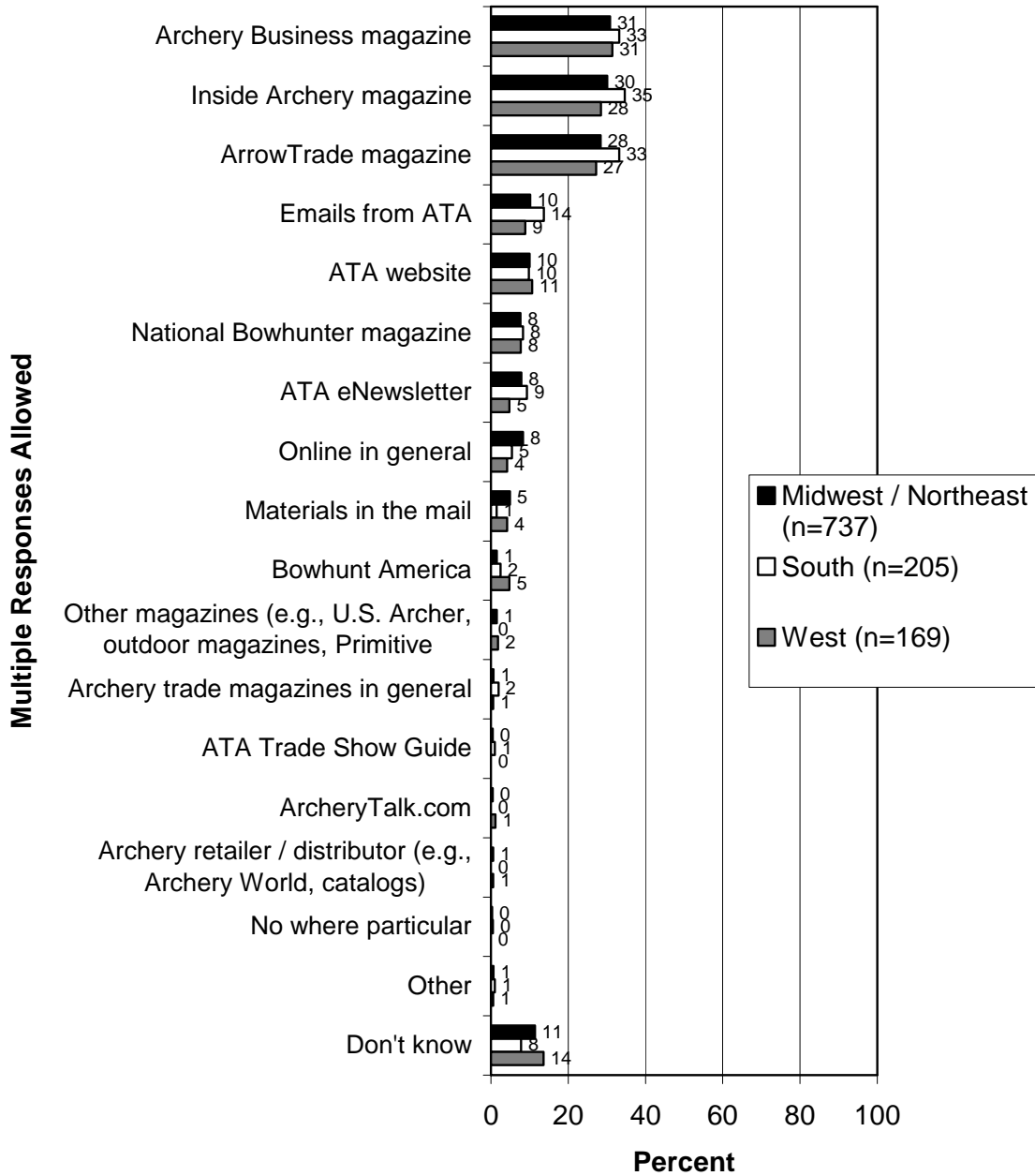
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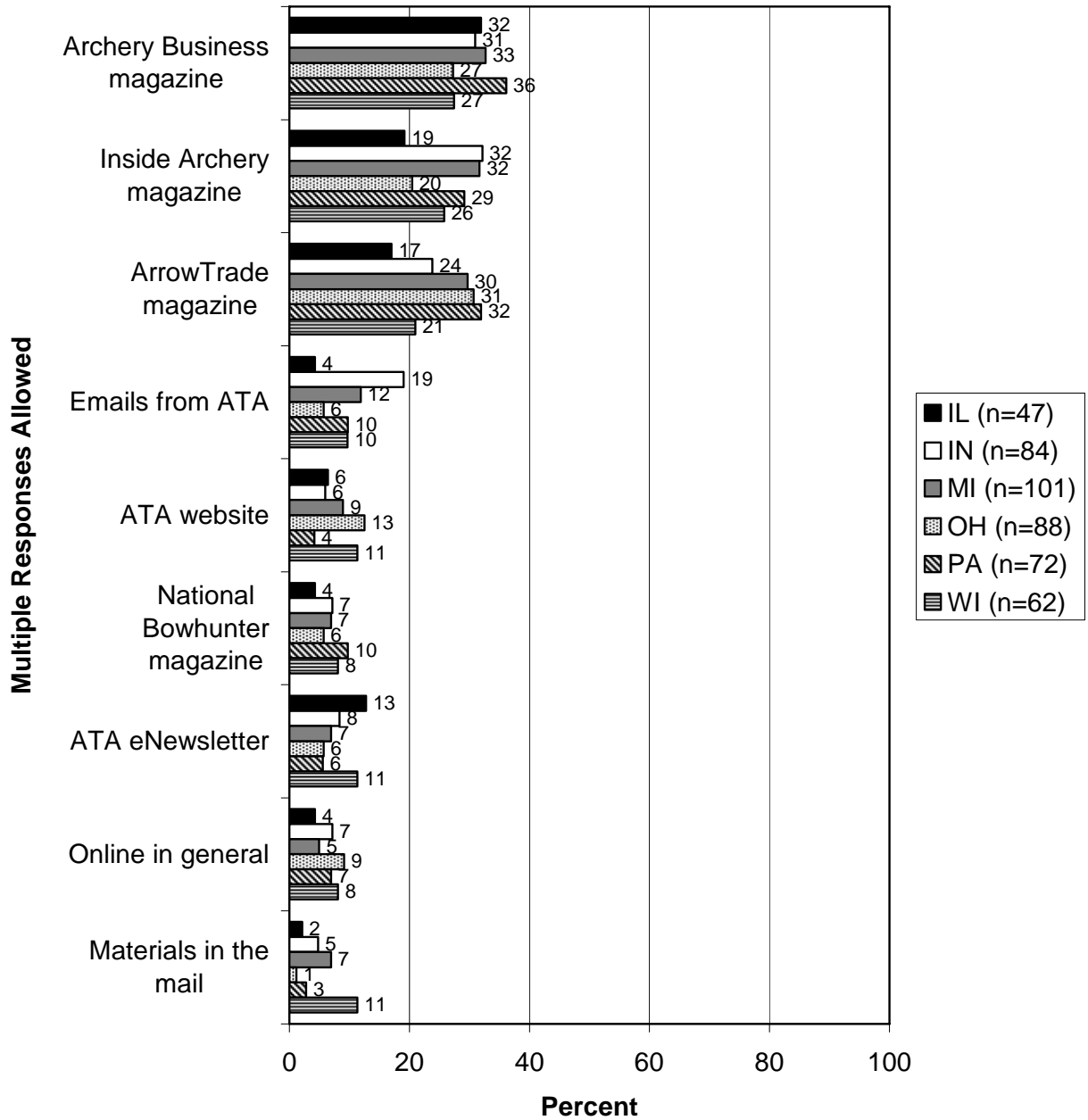
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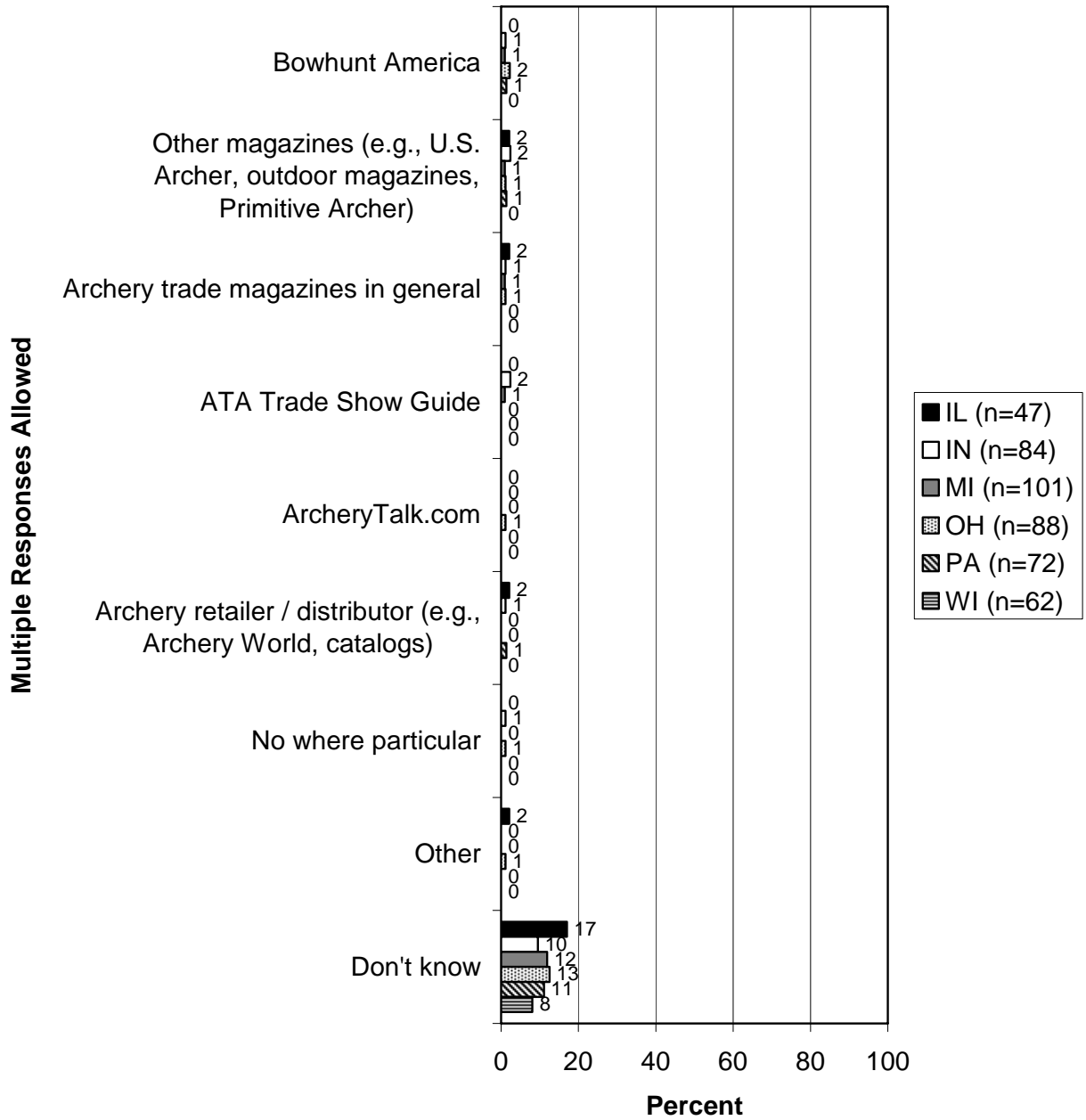
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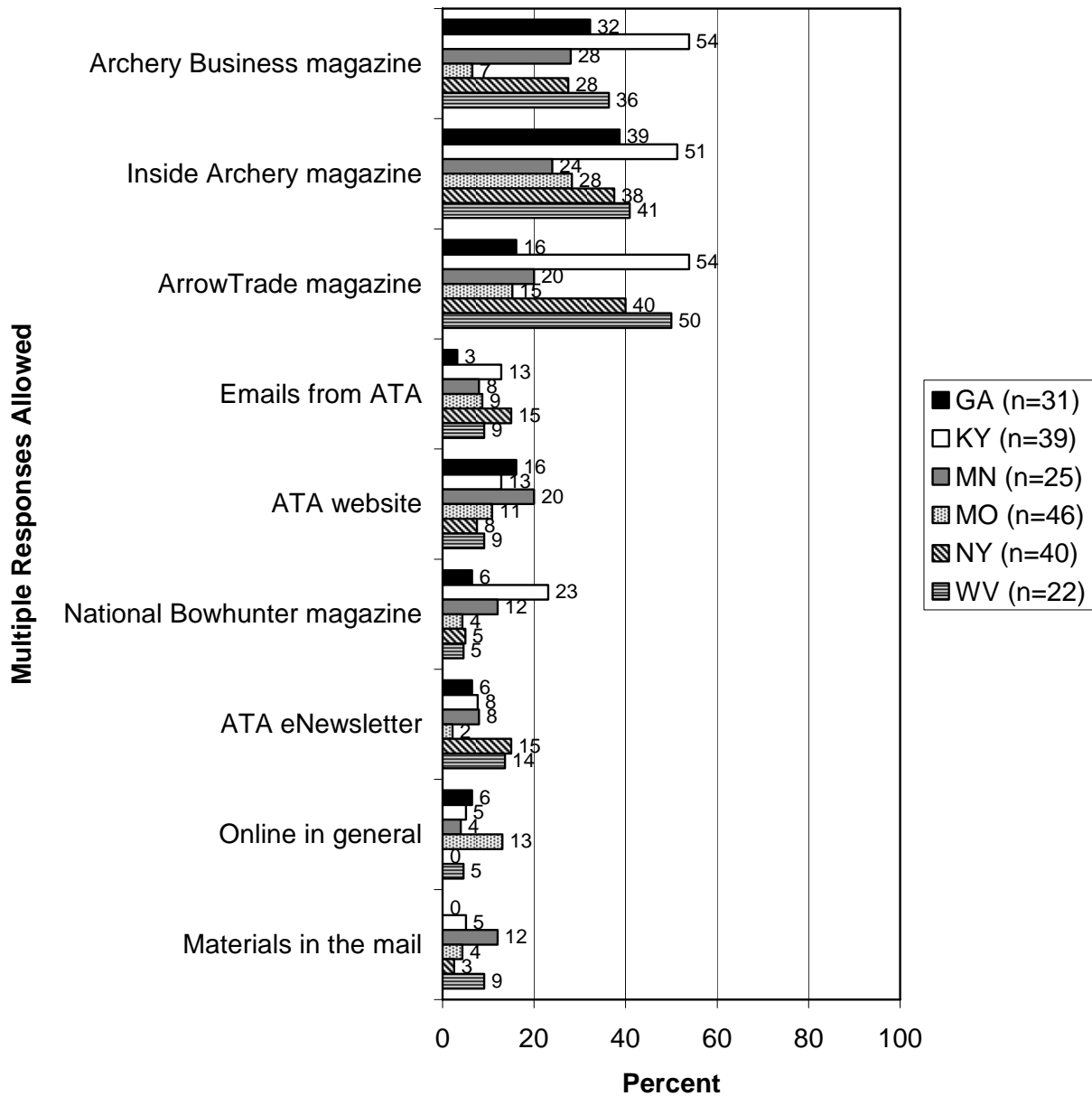
Q41. Where do you like to read about the ATA Trade Show?
(Top 6 of 12 states with a large number of stores)
(Part 1)



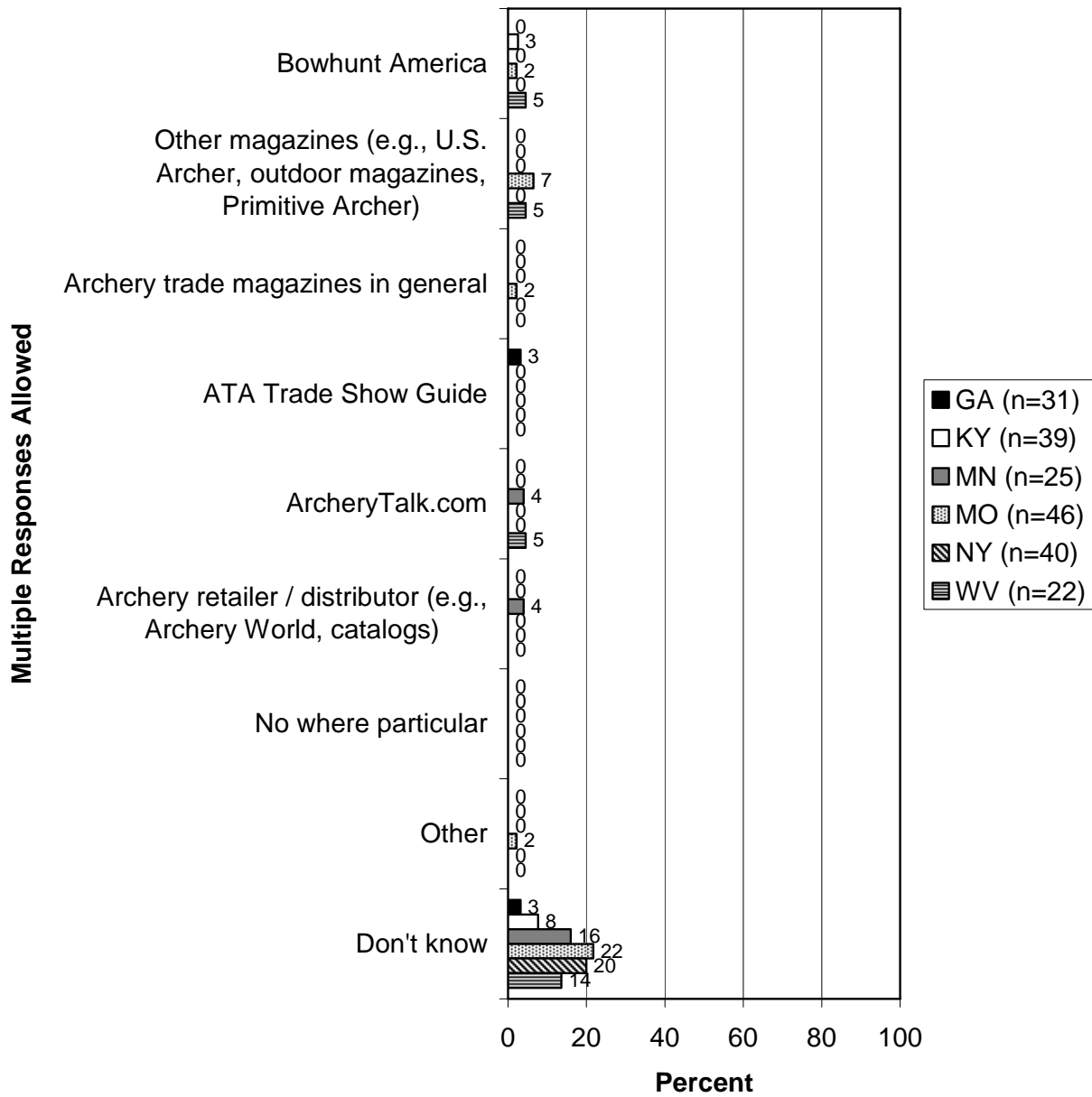
Q41. Where do you like to read about the ATA Trade Show?
(Top 6 of 12 states with a large number of stores)
(Part 2)



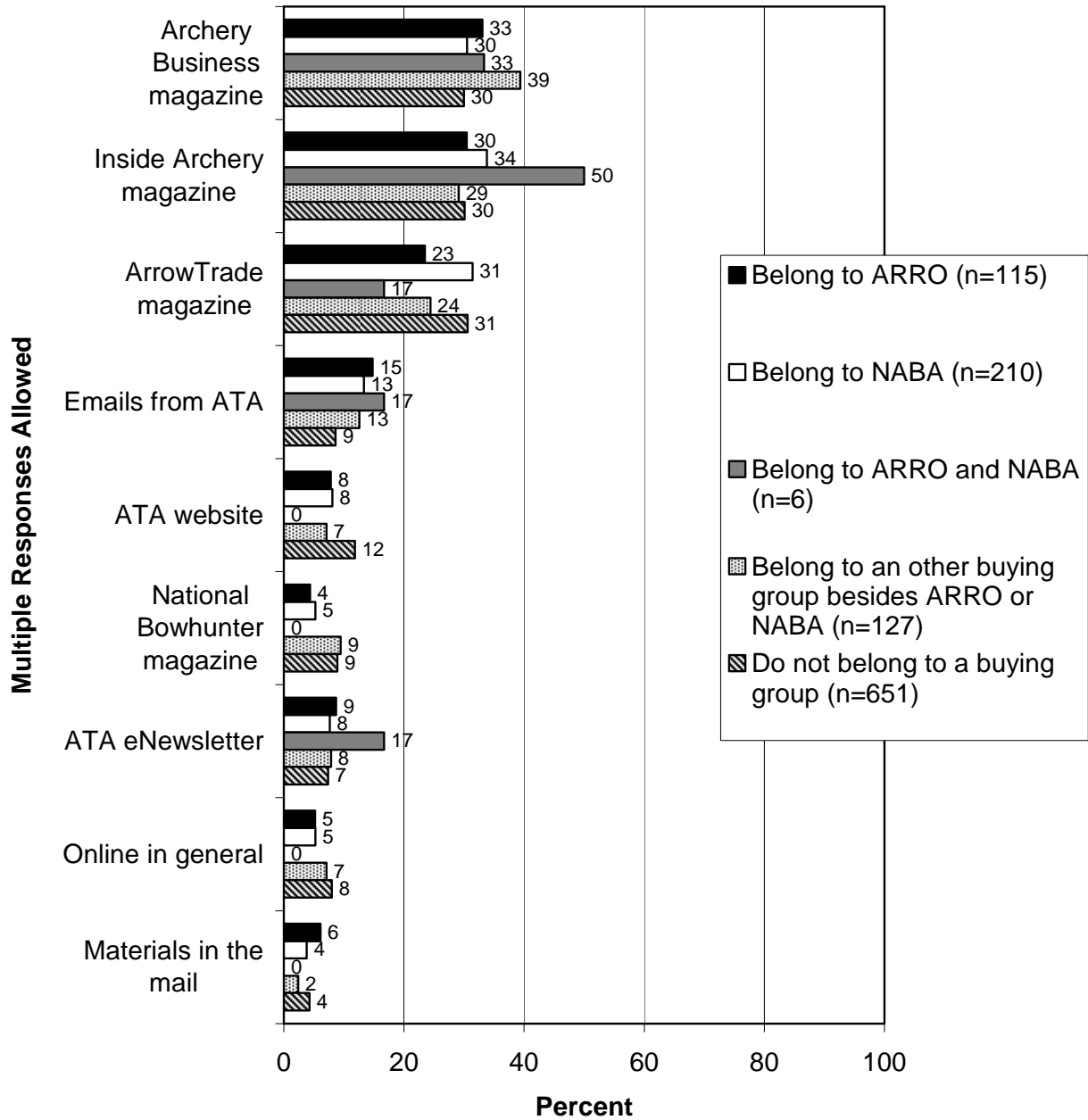
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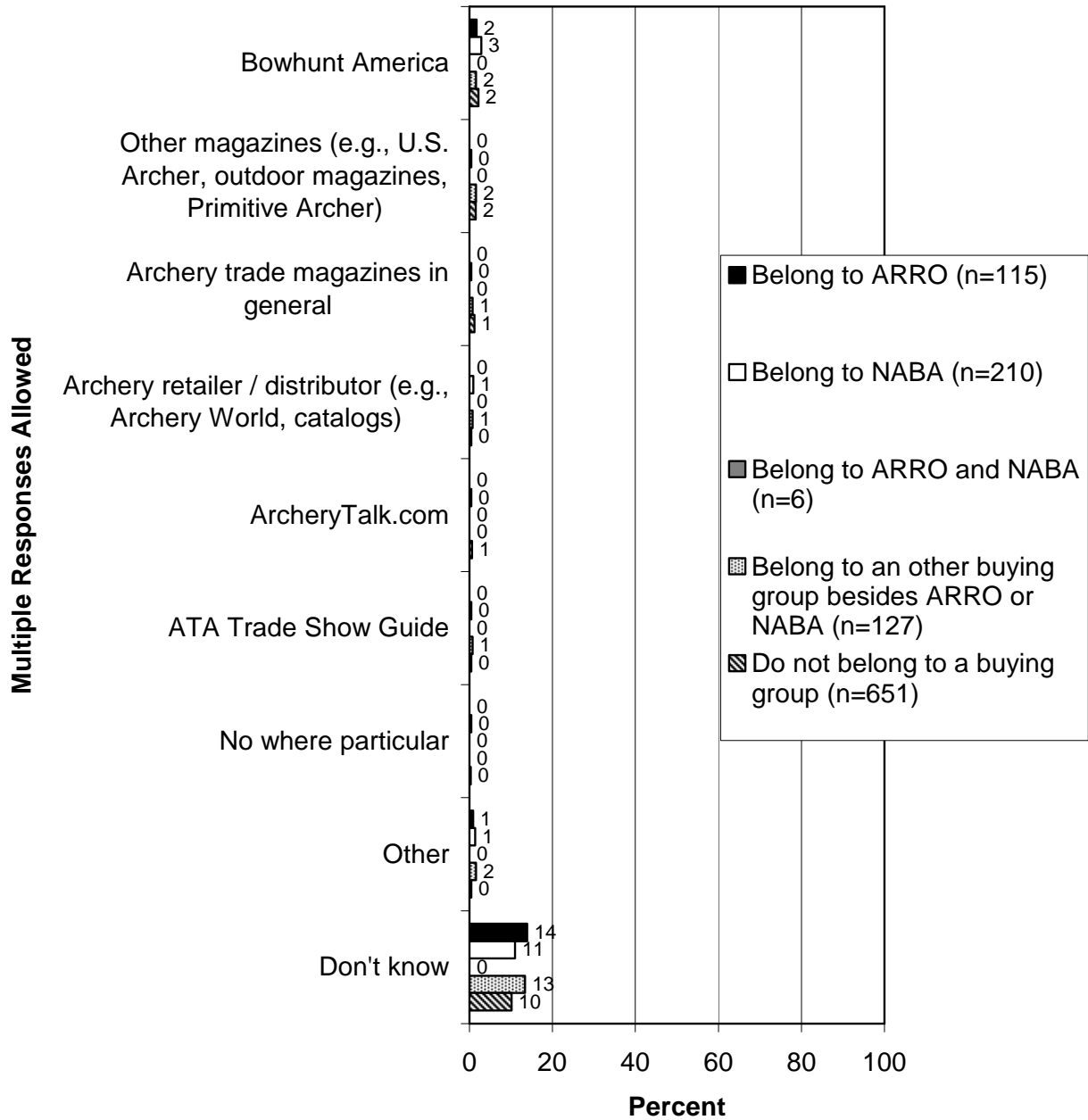
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(Bottom 6 of 12 states with a large number of stores)
(Part 2)



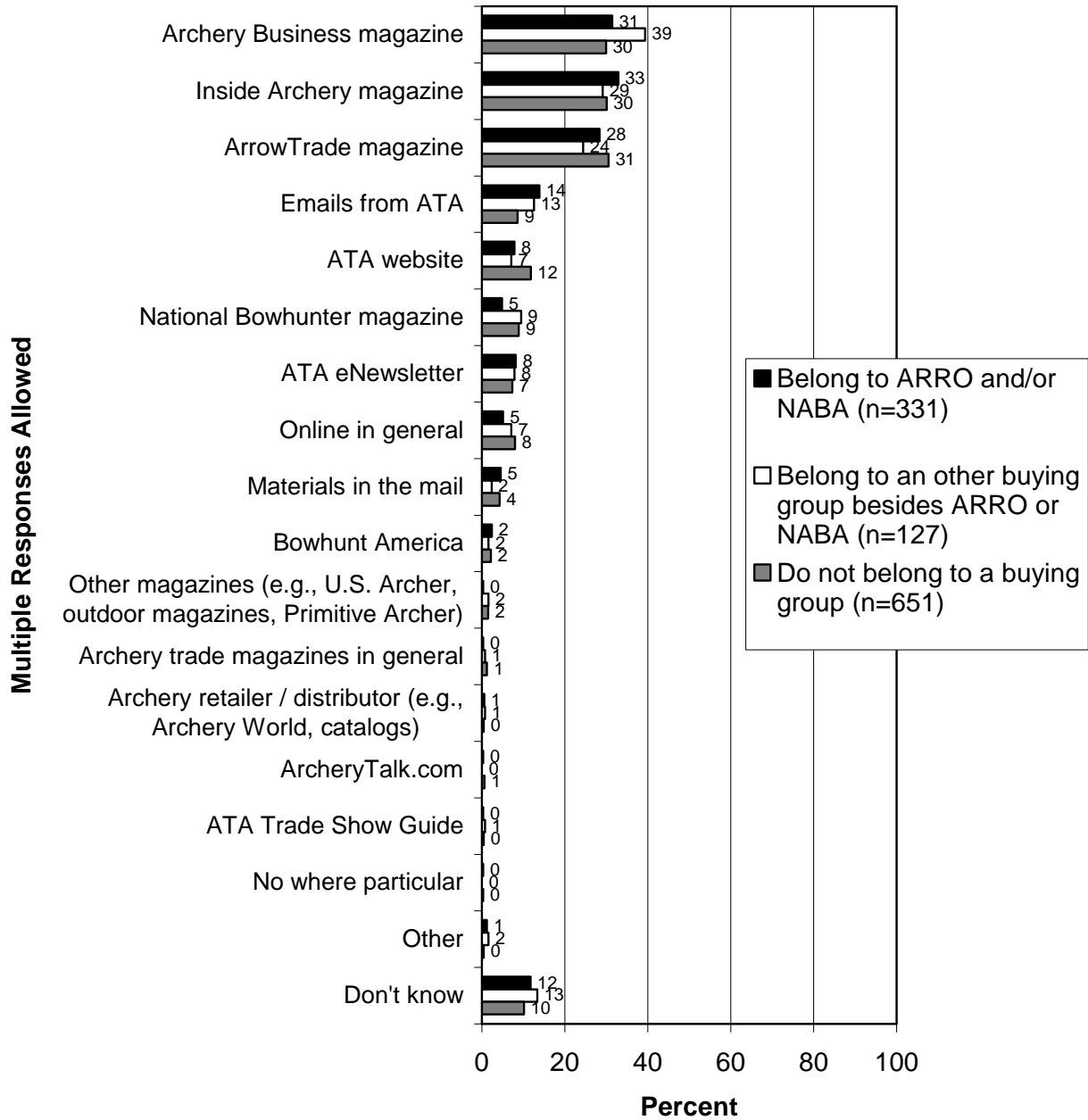
Q41. Where do you like to read about the ATA Trade Show? (Part 1)



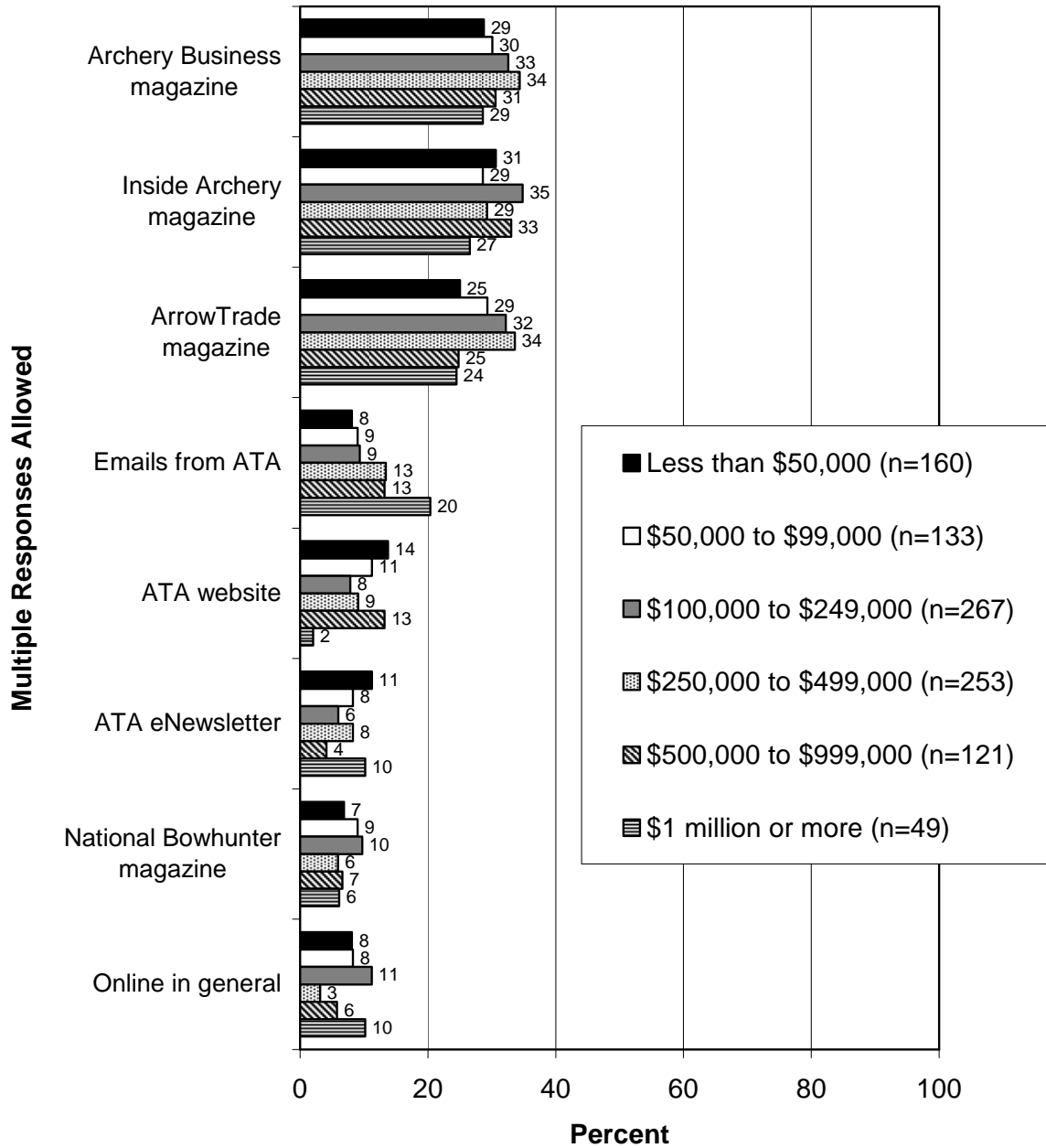
Q41. Where do you like to read about the ATA Trade Show? (Part 2)



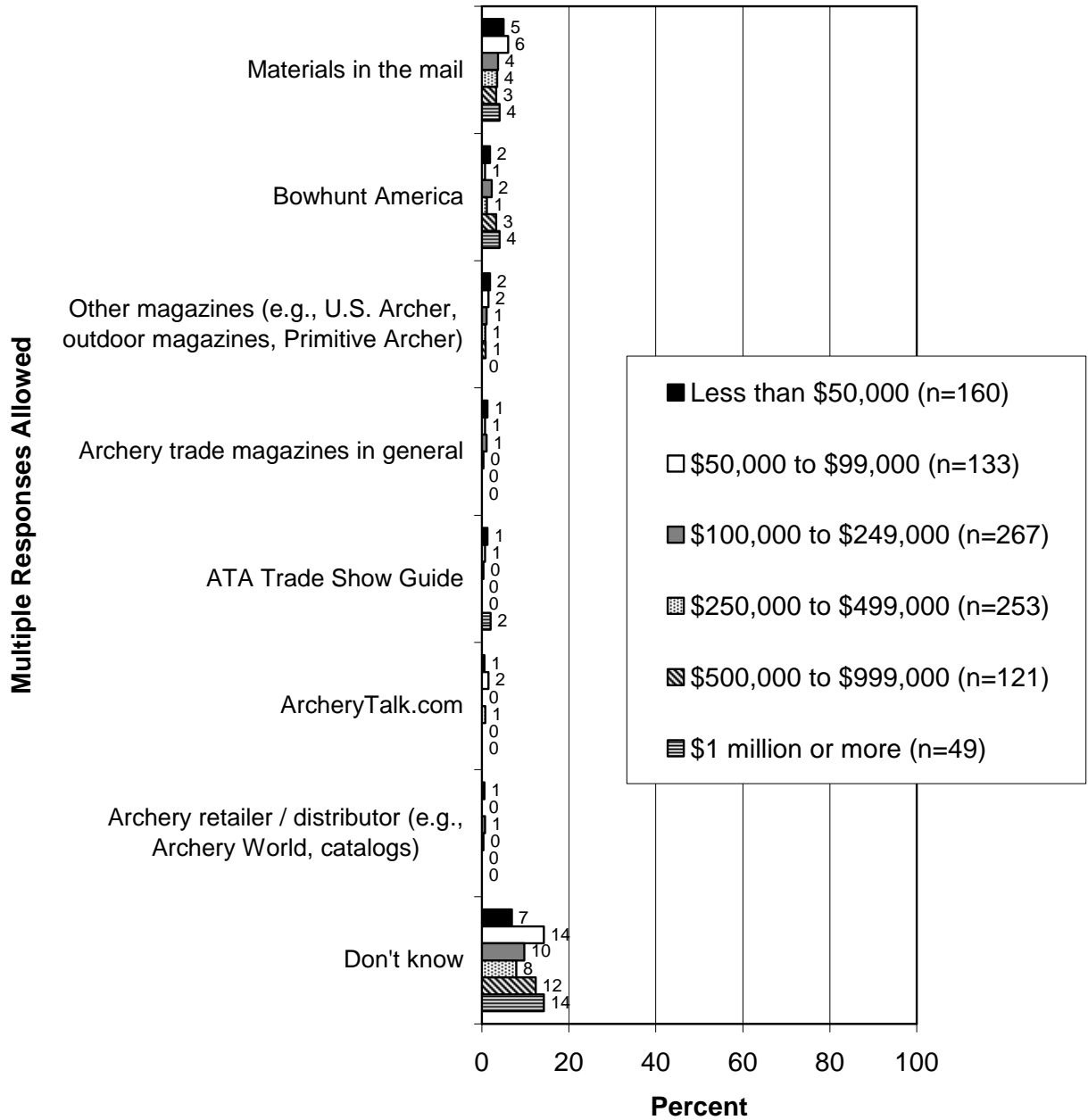
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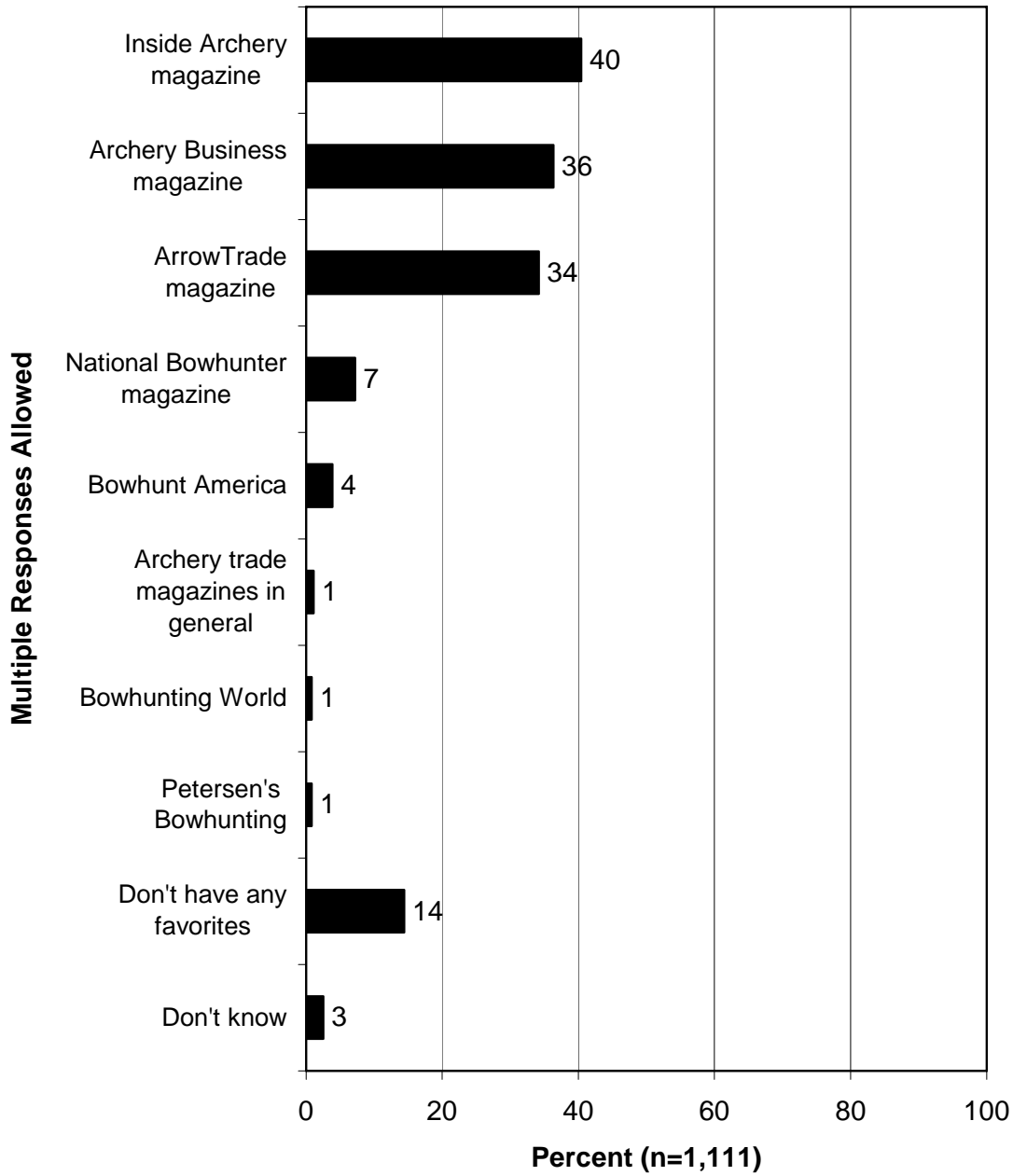
Q41. Where do you like to read about the ATA Trade Show? (Part 1.)



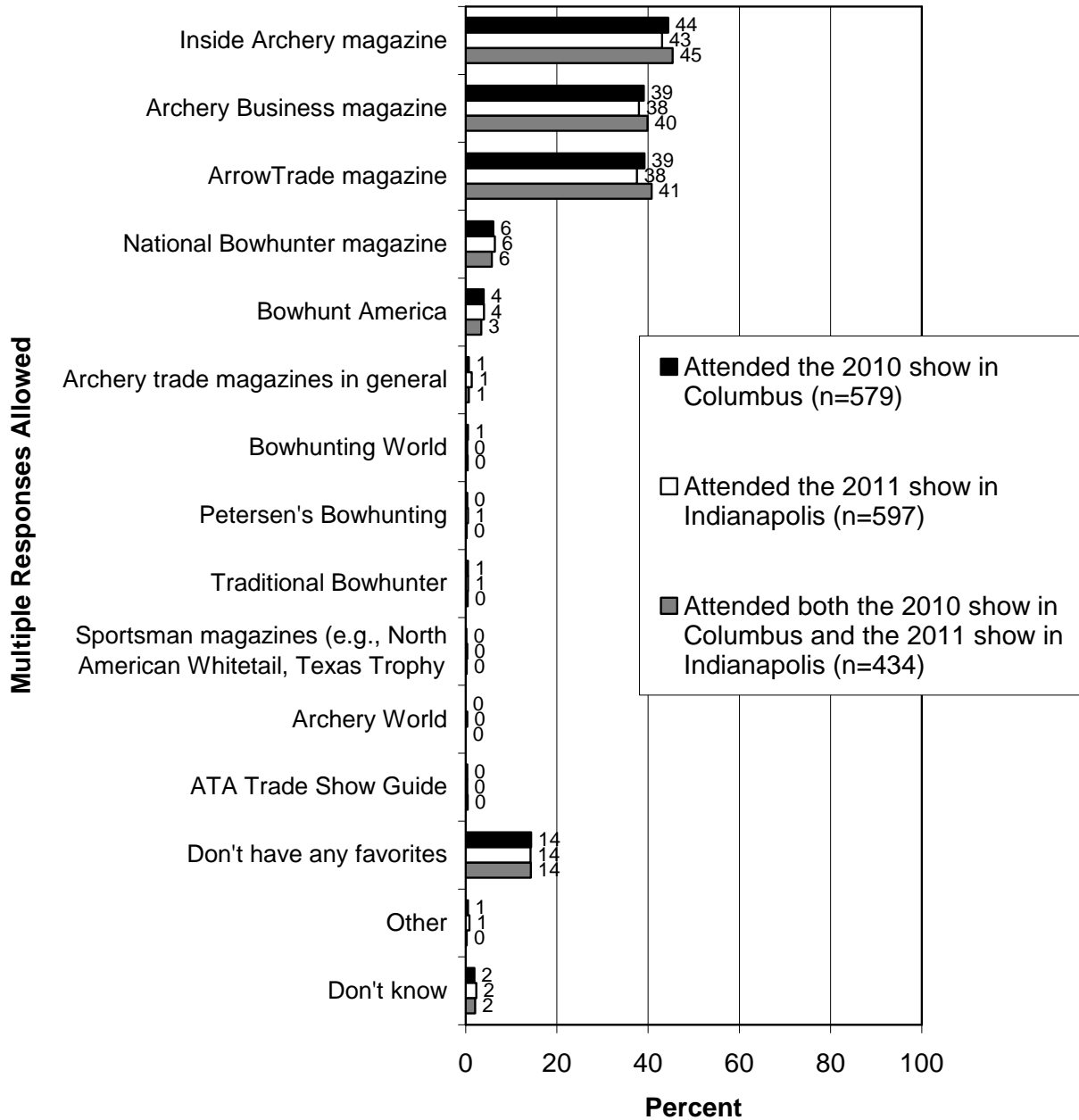
Q41. Where do you like to read about the ATA Trade Show? (Part 2.)



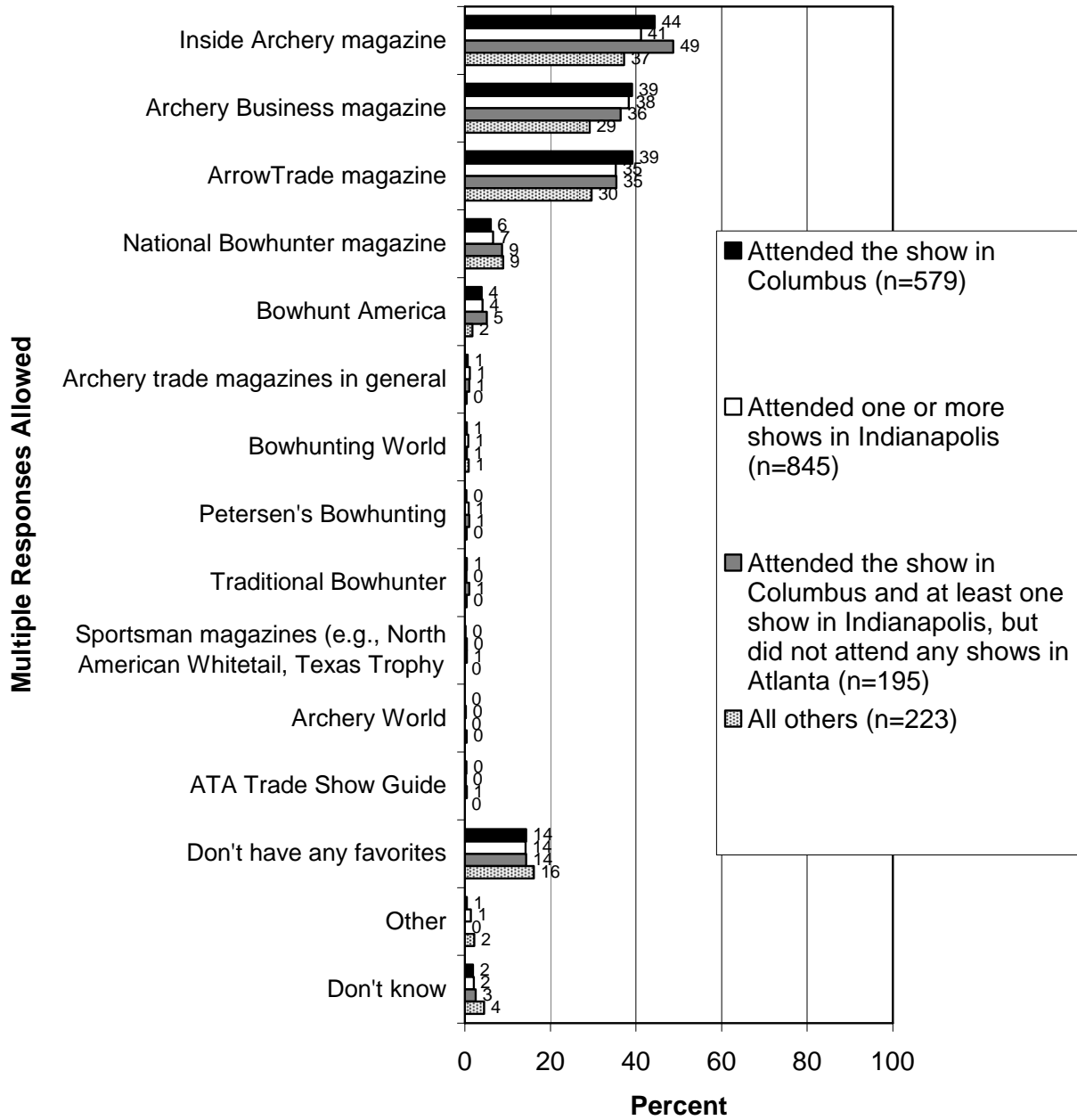
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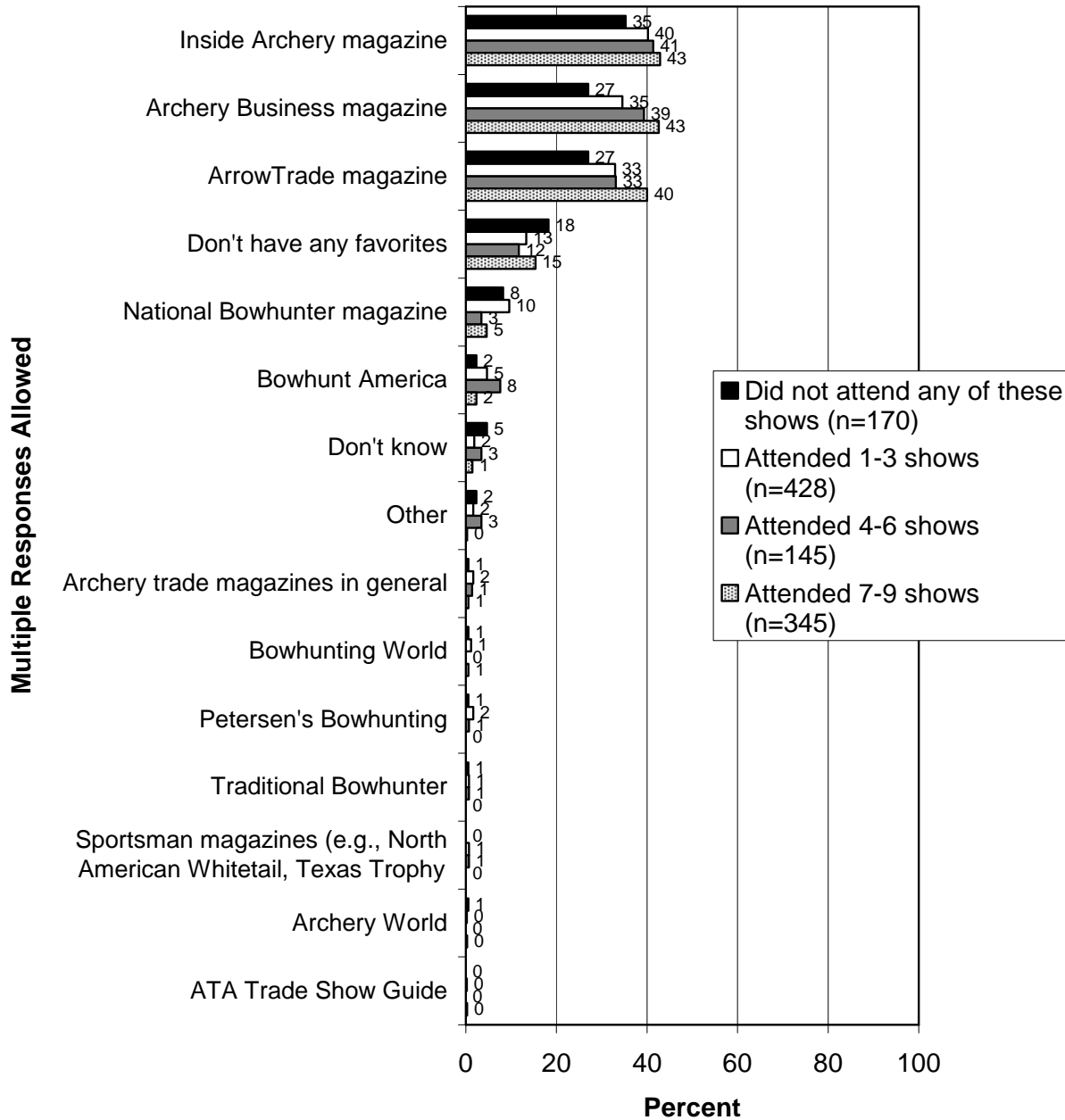
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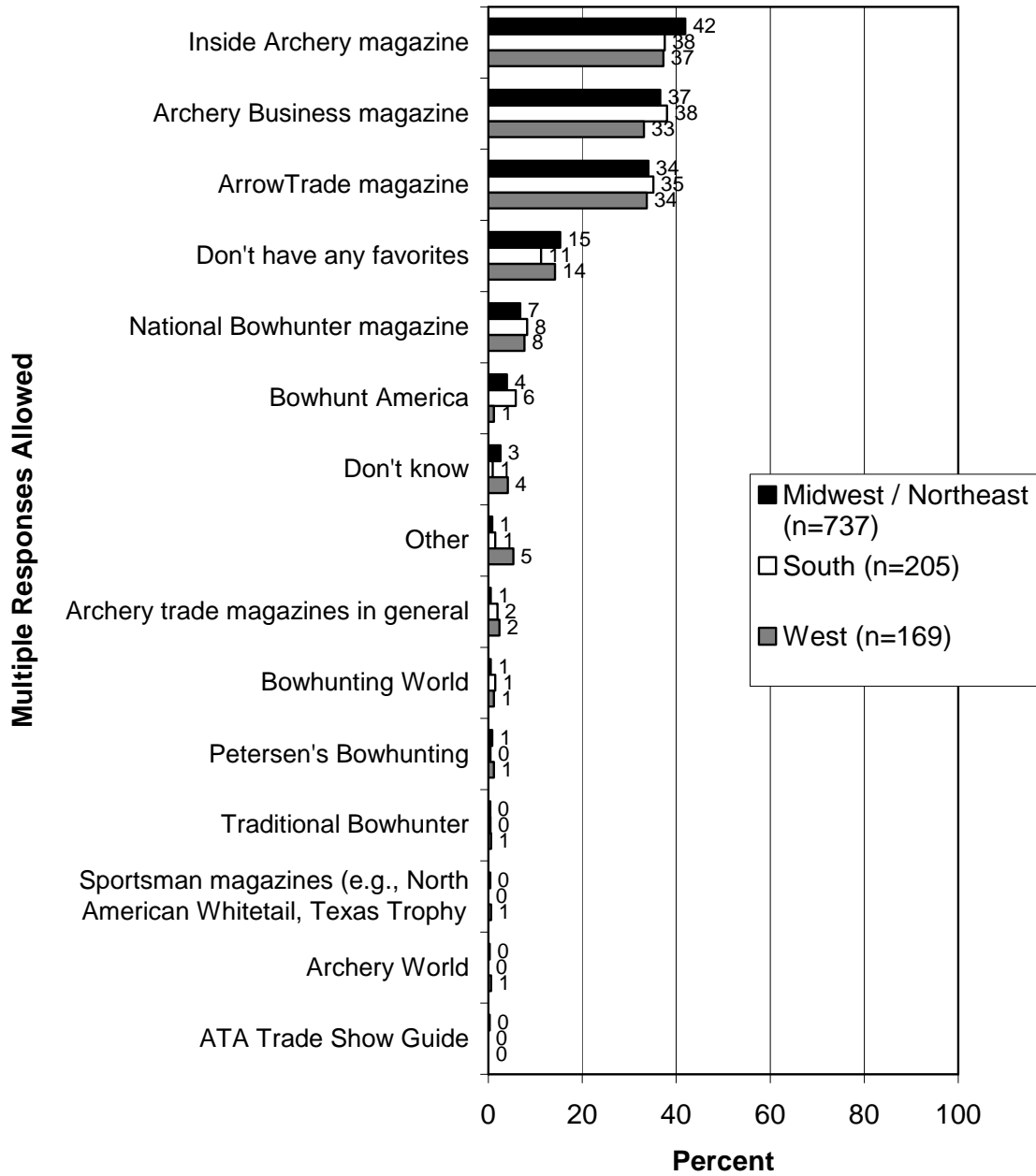
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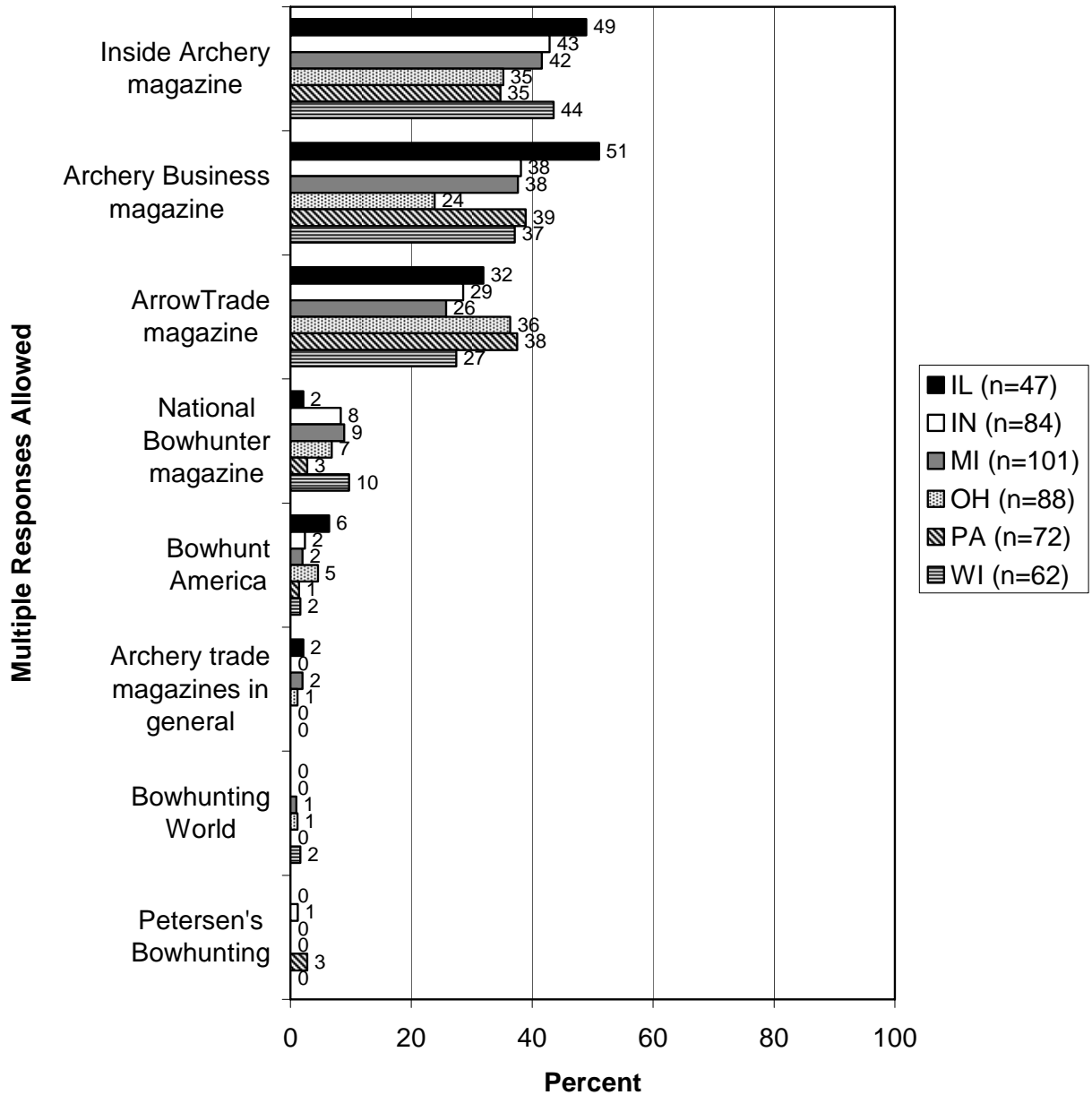
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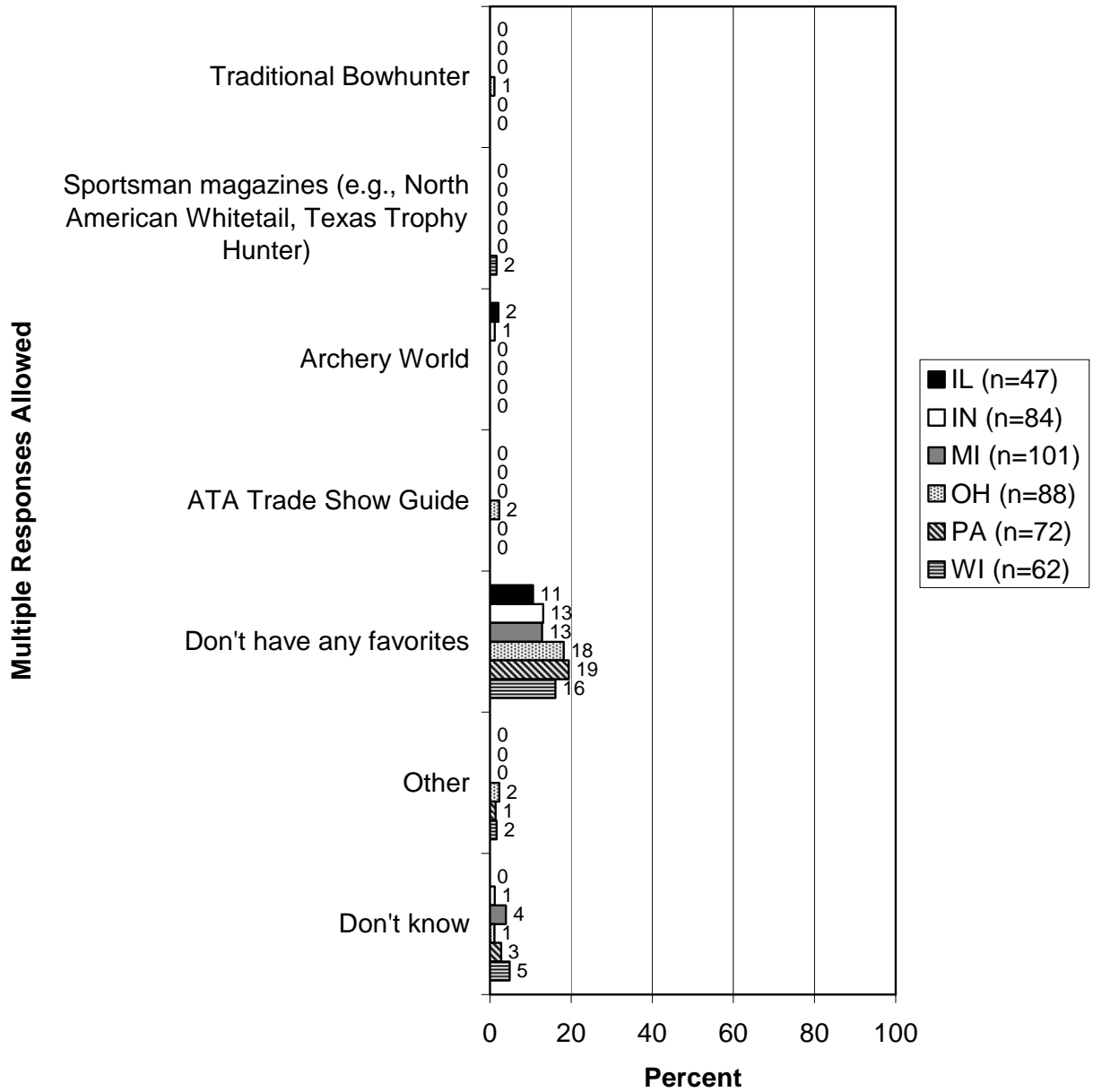
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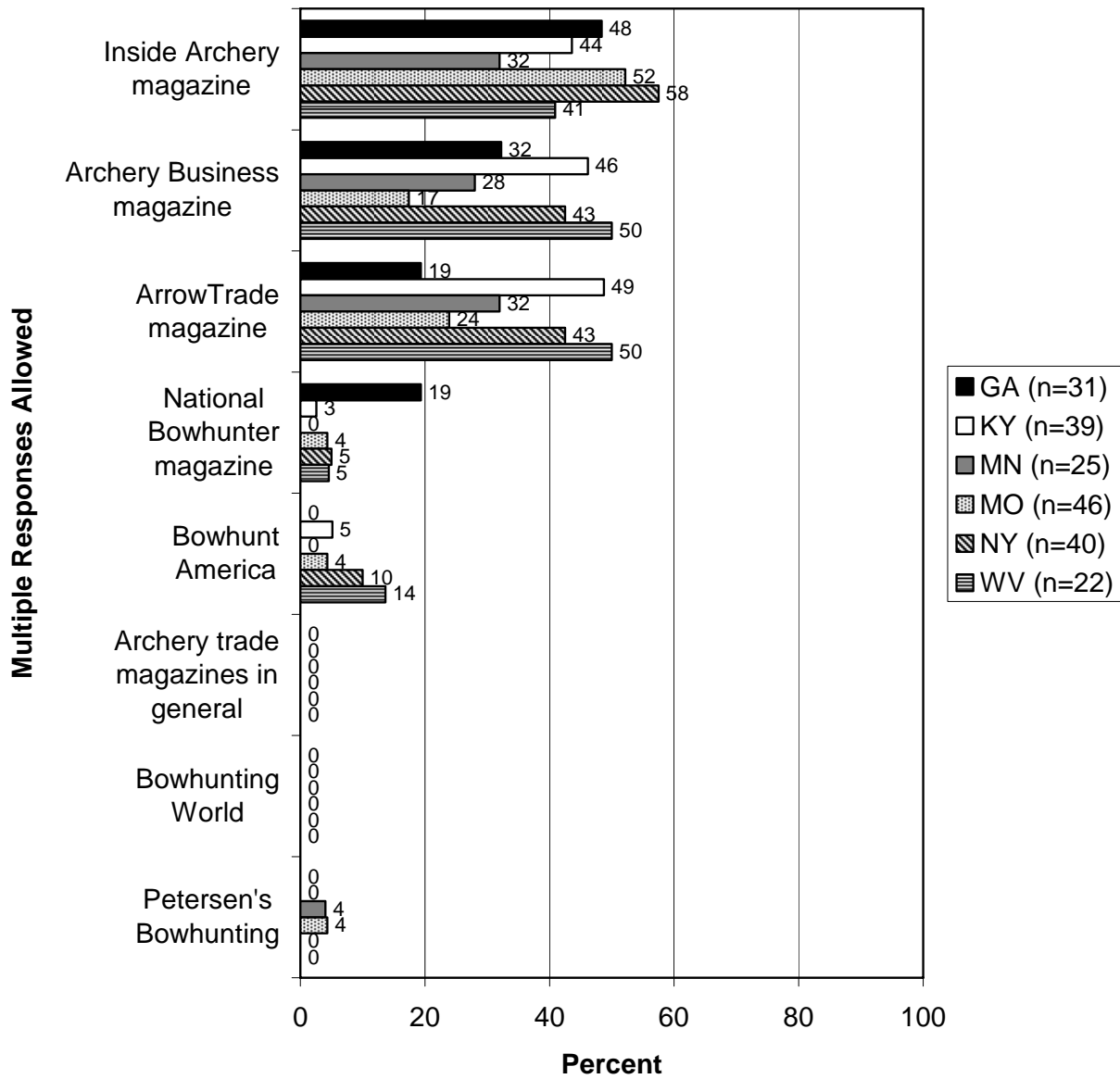
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(Part 1)**



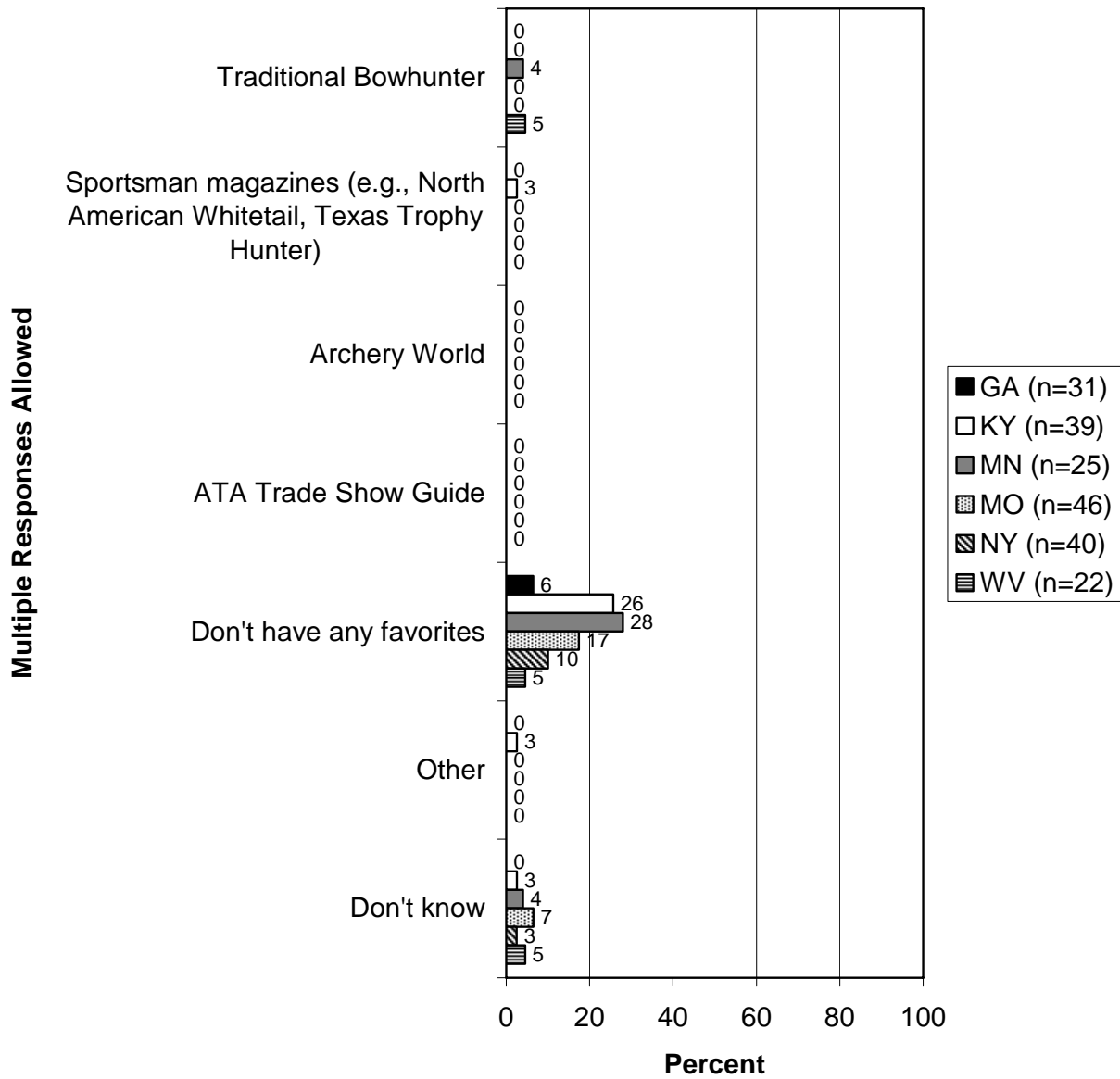
**Q45. Which trade magazine do you prefer to read for information about the archery and bowhunting industry?
(Top 6 of 12 states with a large number of stores)
(Part 2)**



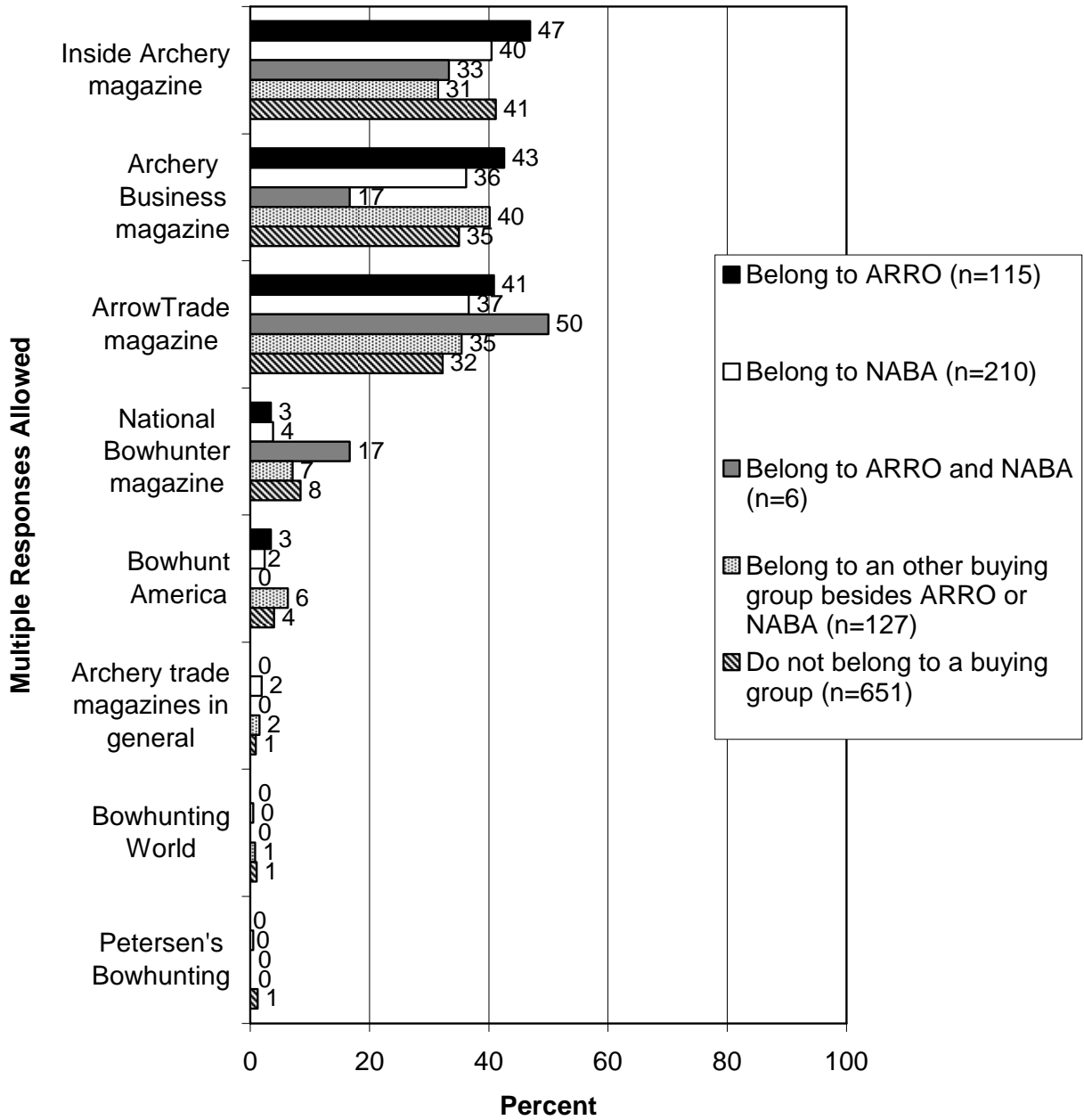
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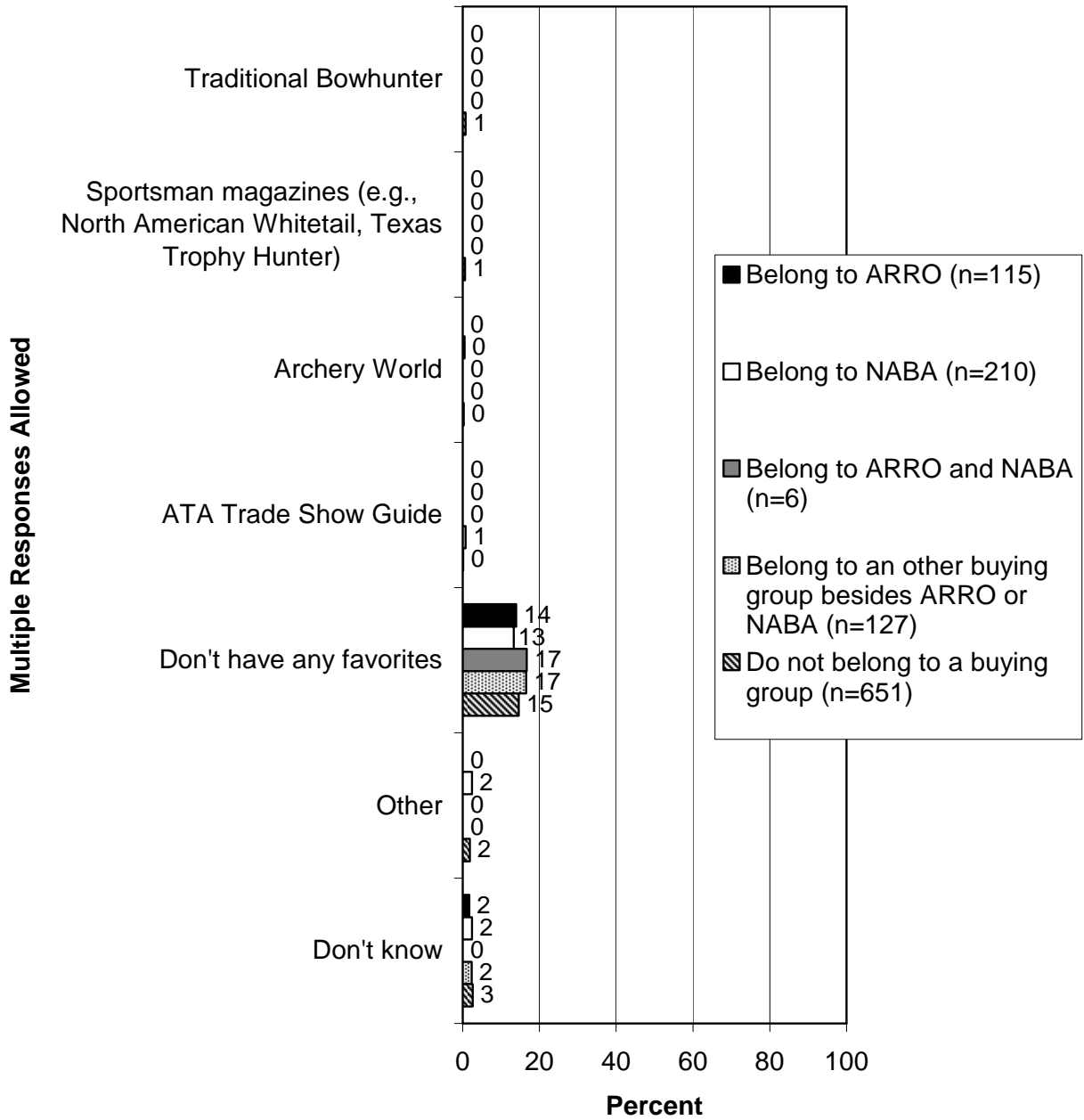
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(Part 2)



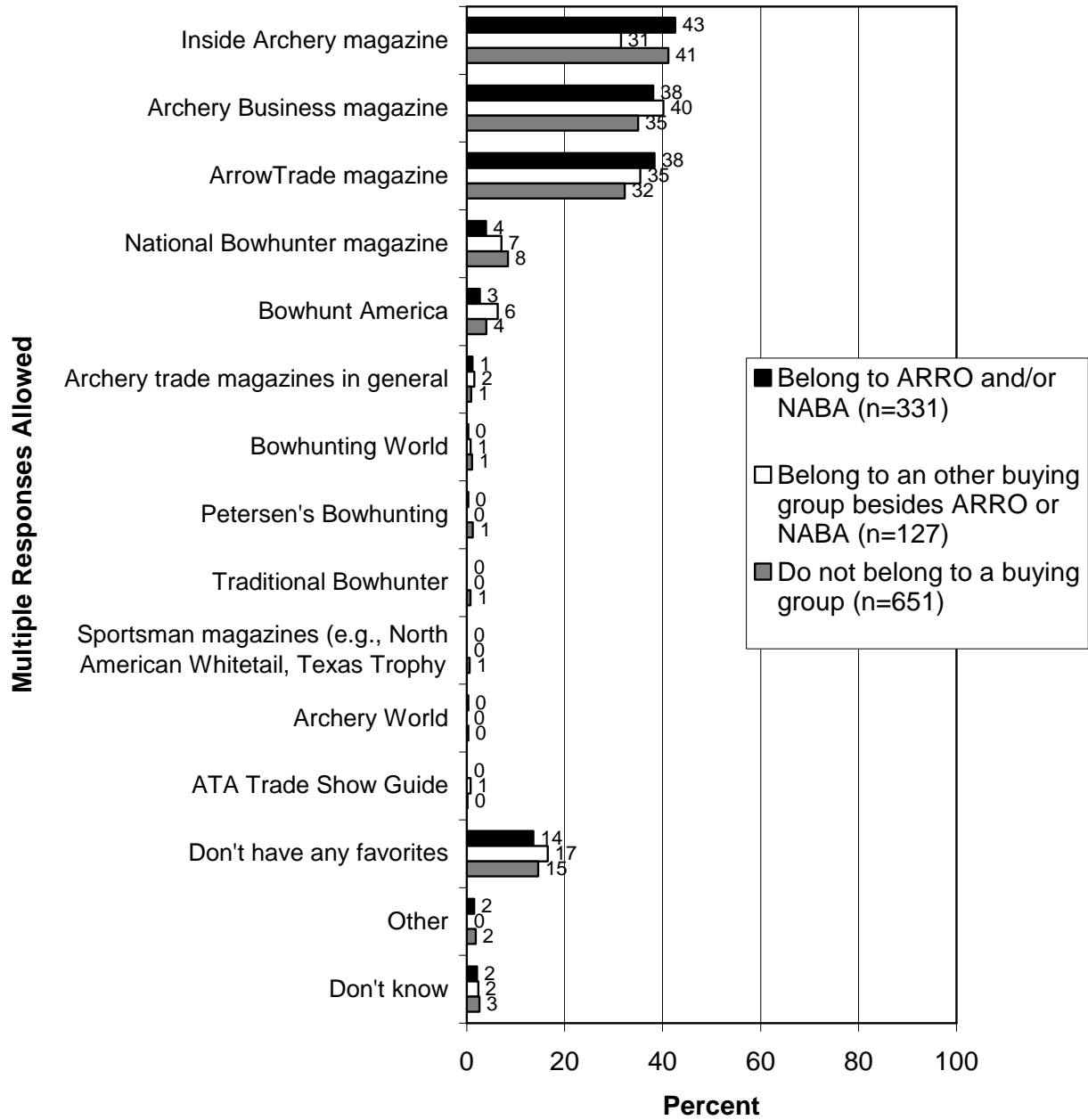
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(Part 1)**



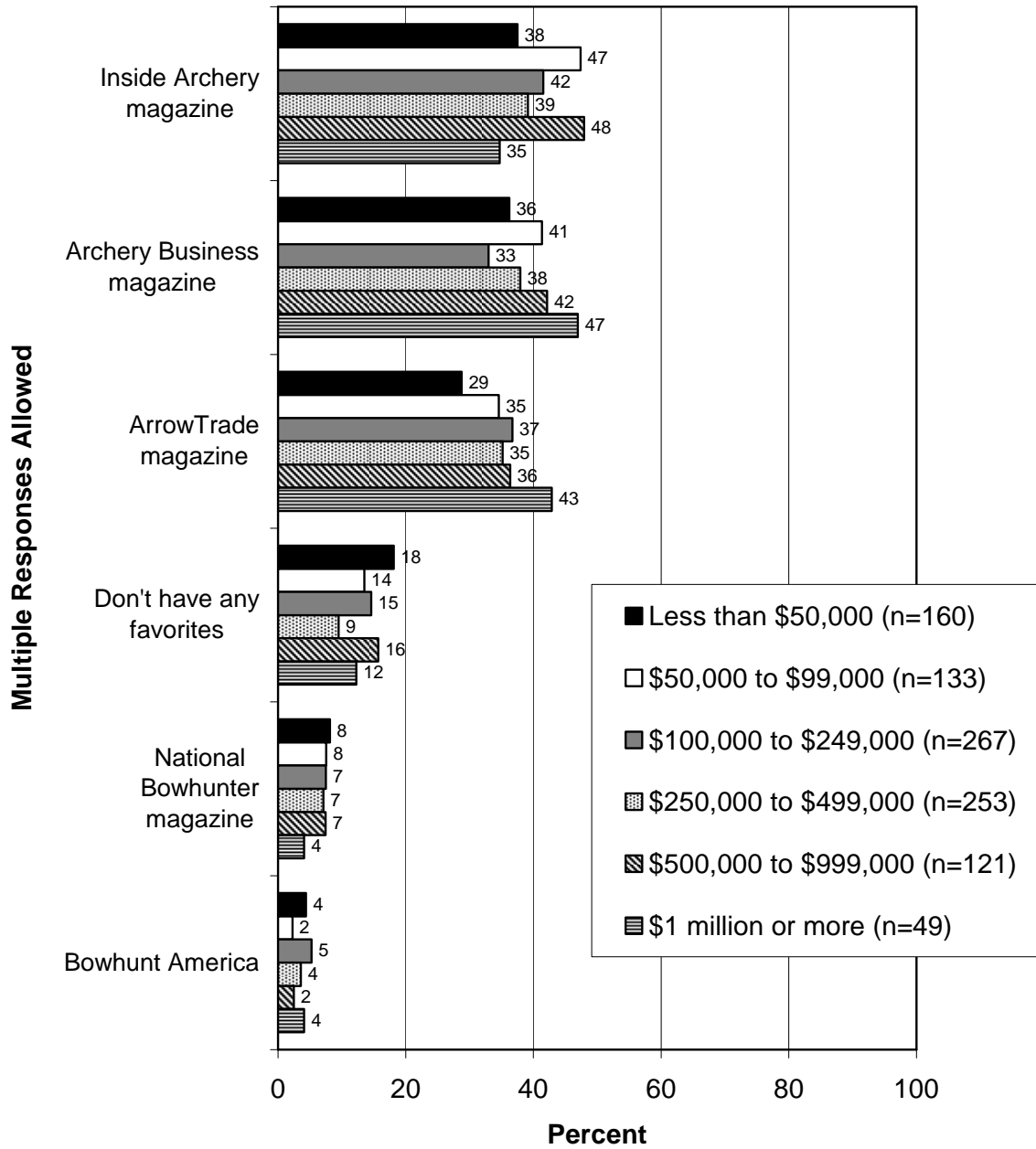
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(Part 2)**



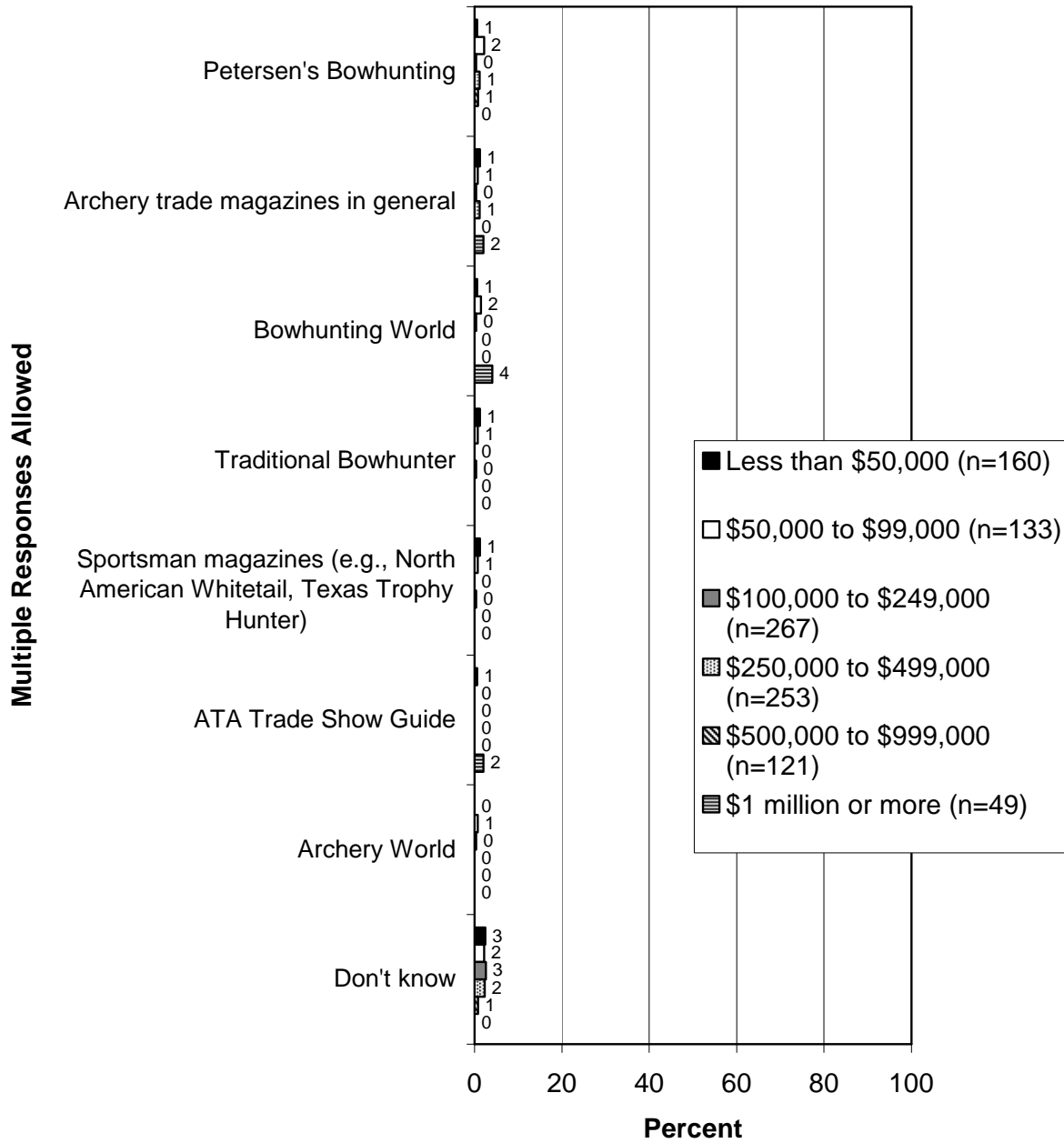
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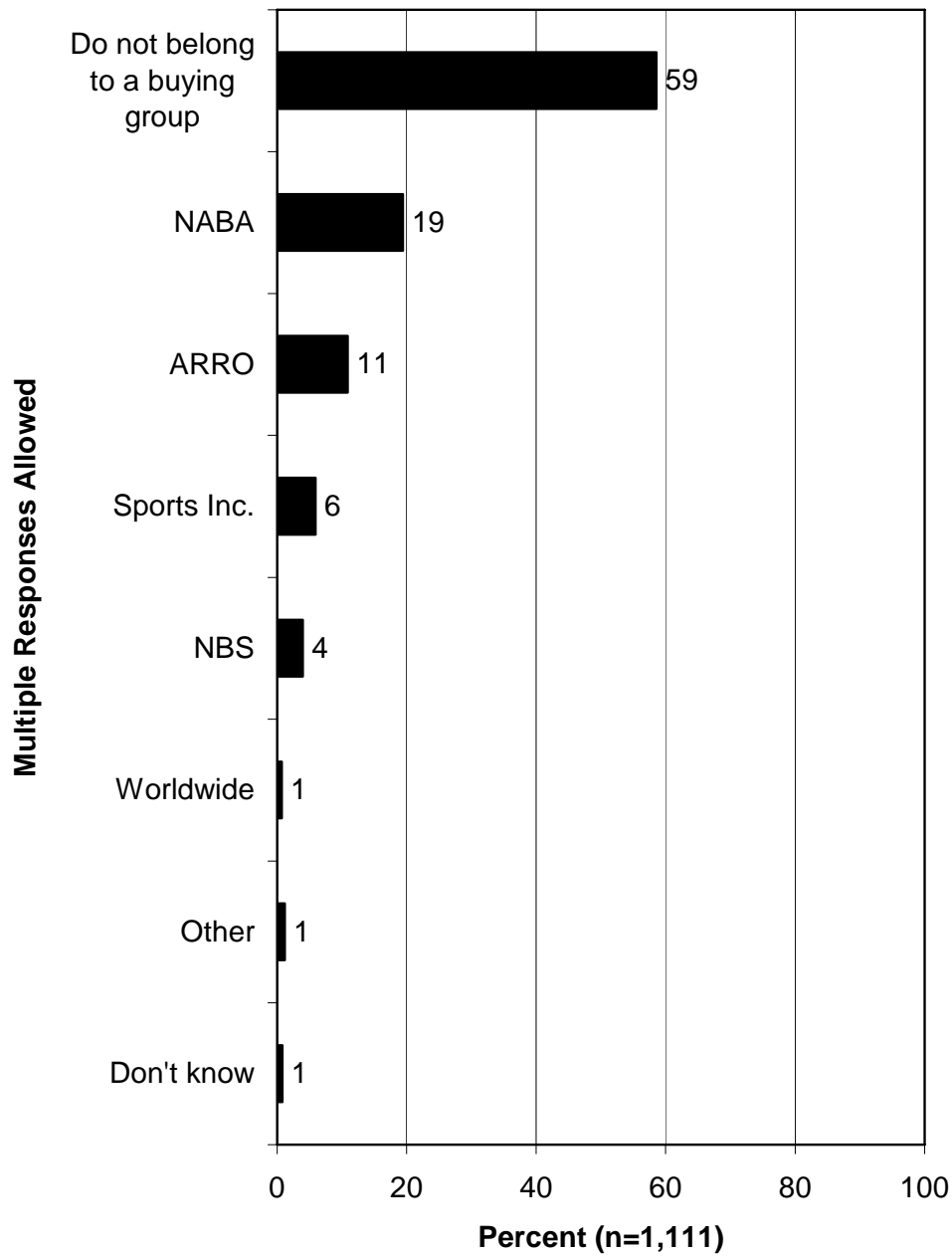


Q45. Which trade magazine do you prefer to read for information about the archery and bowhunting industry? (Part 2.)

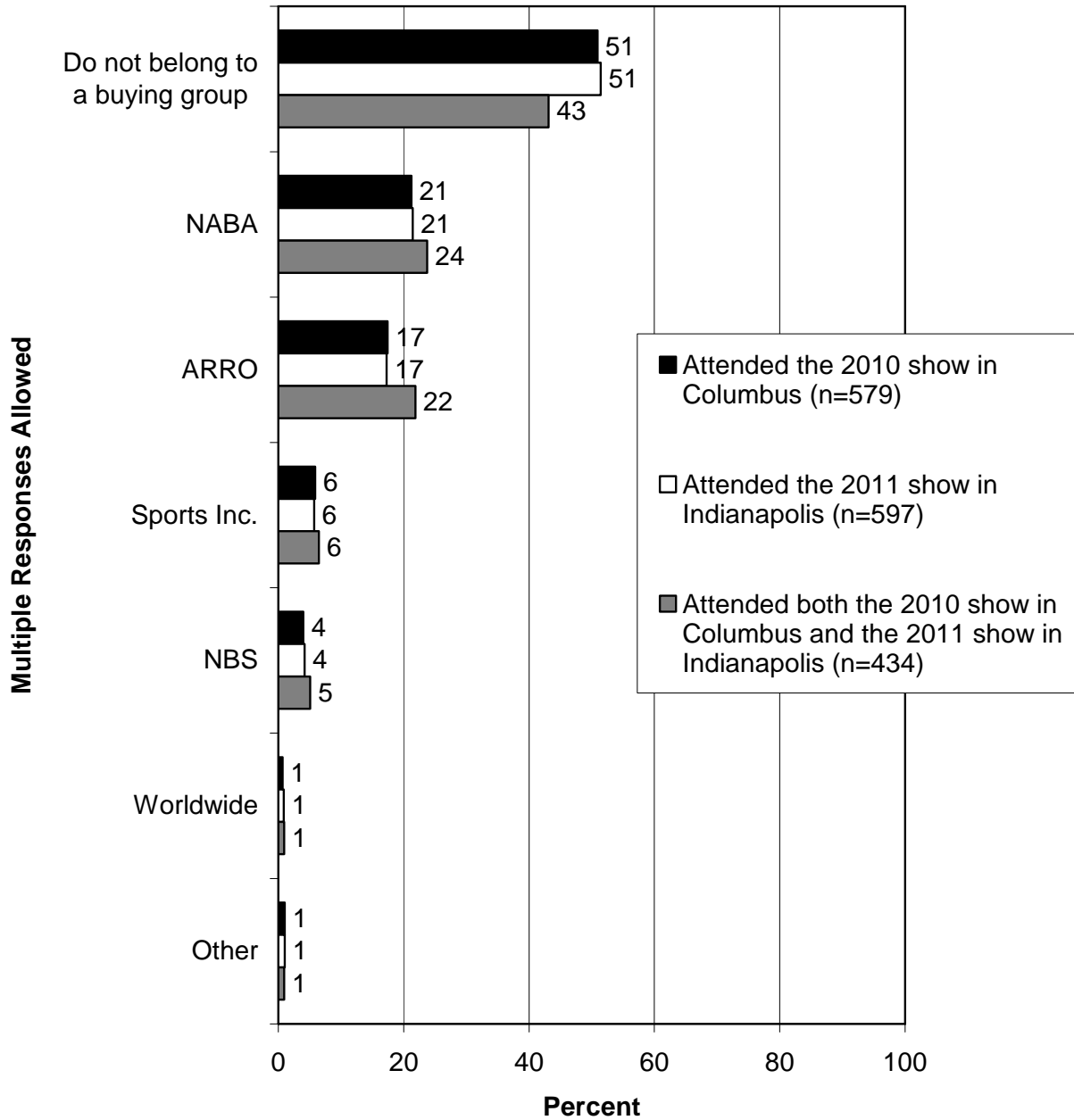


BUYING GROUPS AND PURCHASING THROUGH A DISTRIBUTOR

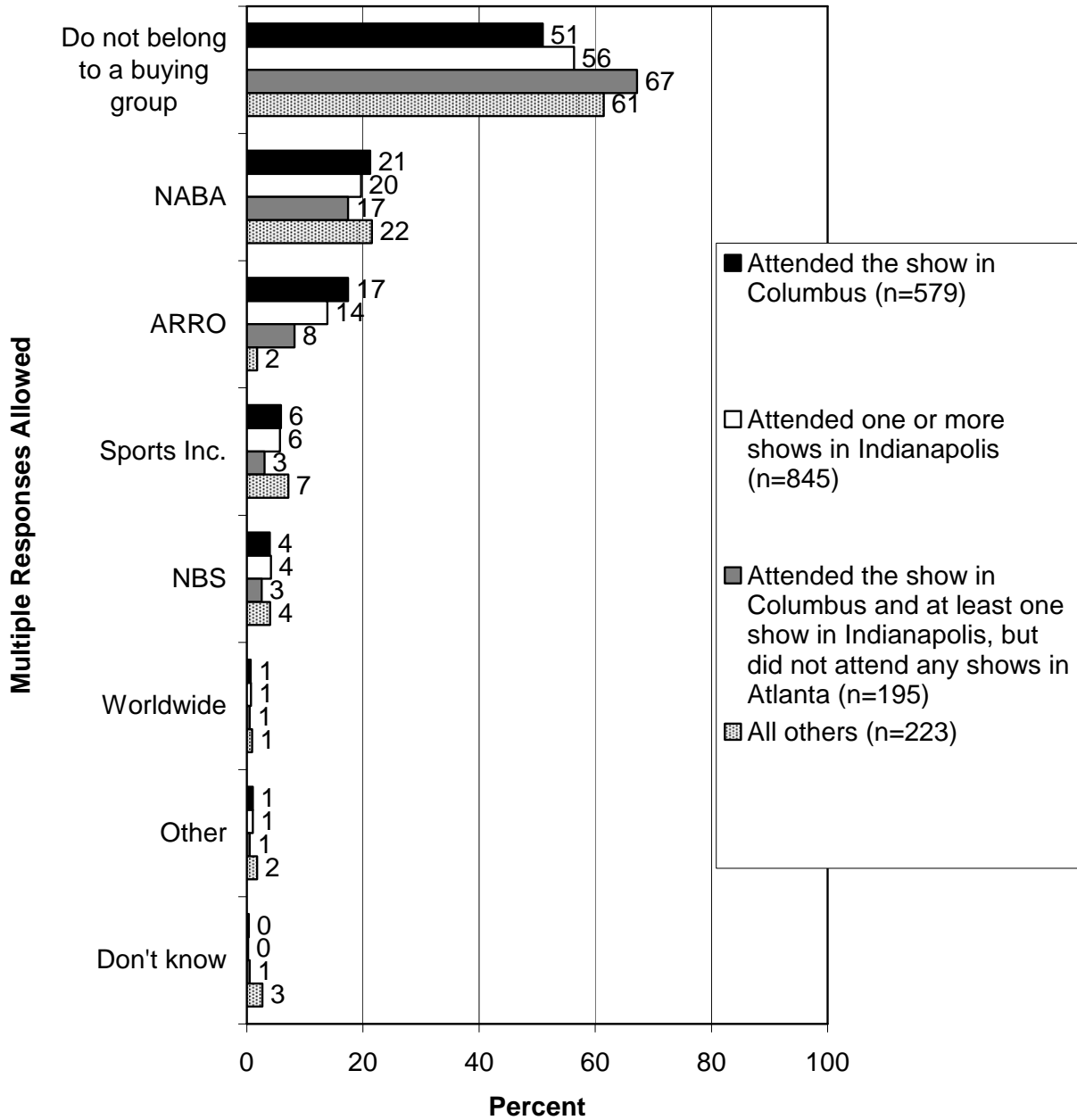
Q49. Do you belong to any buying groups? If so, which ones?



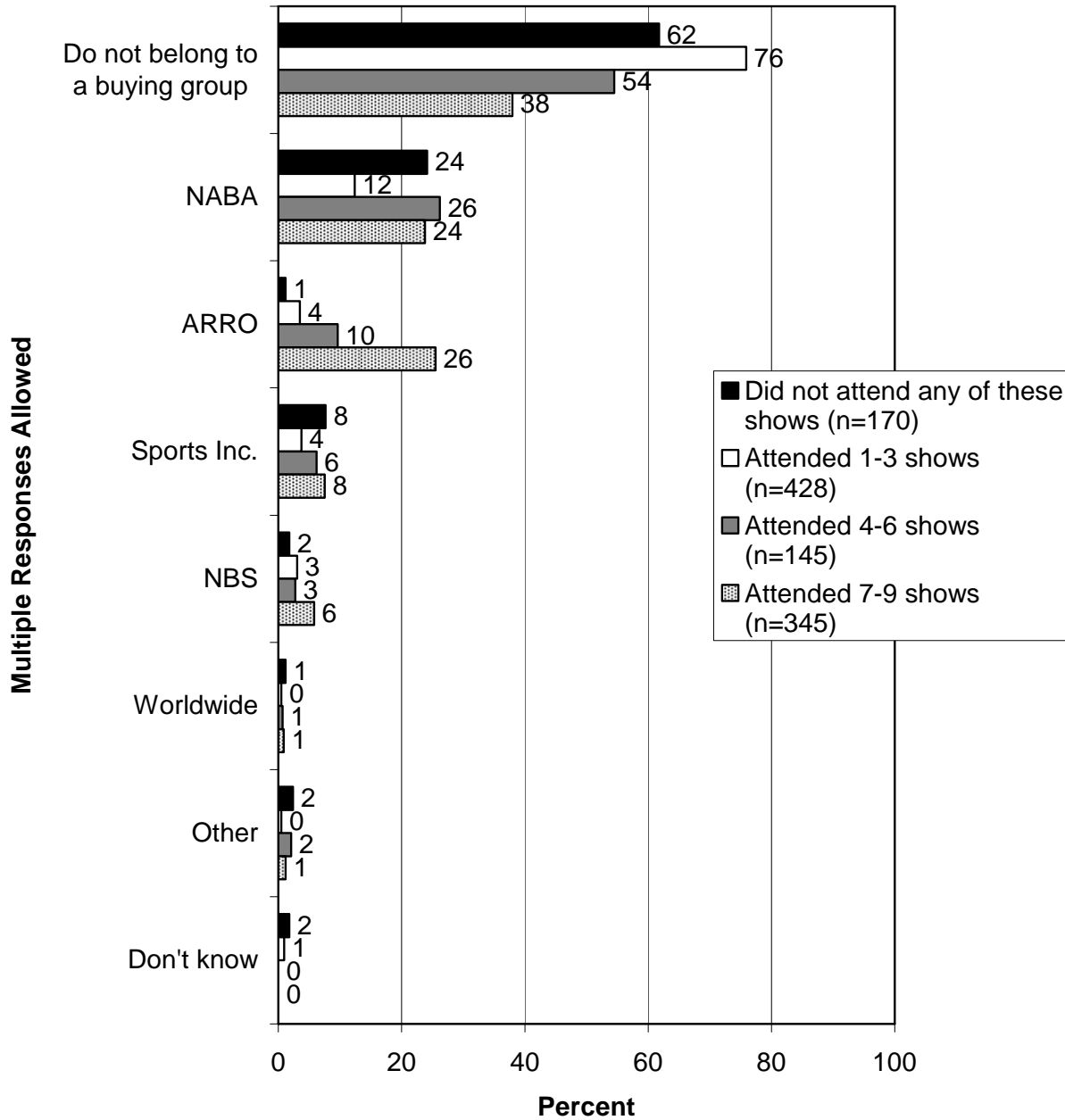
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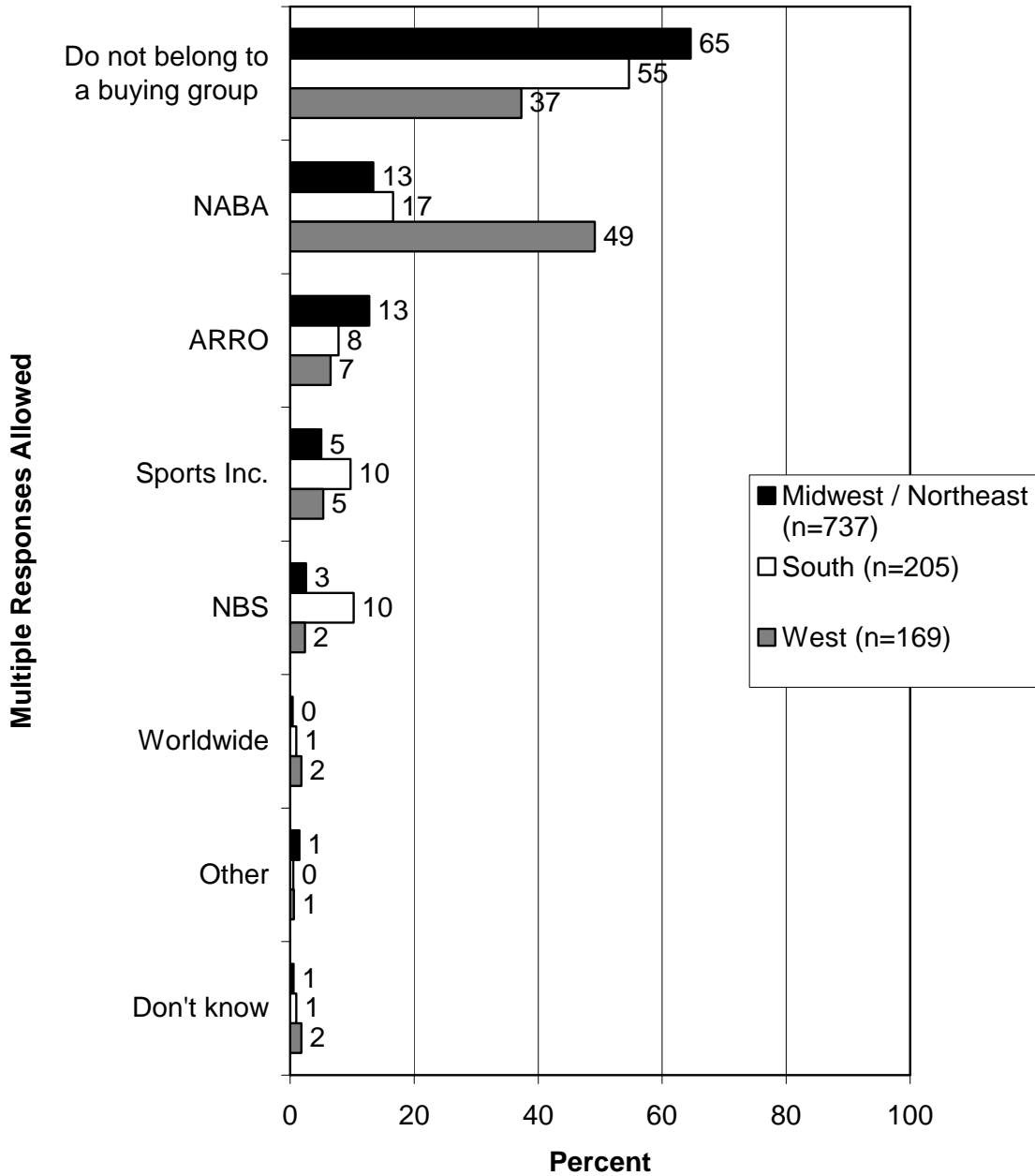
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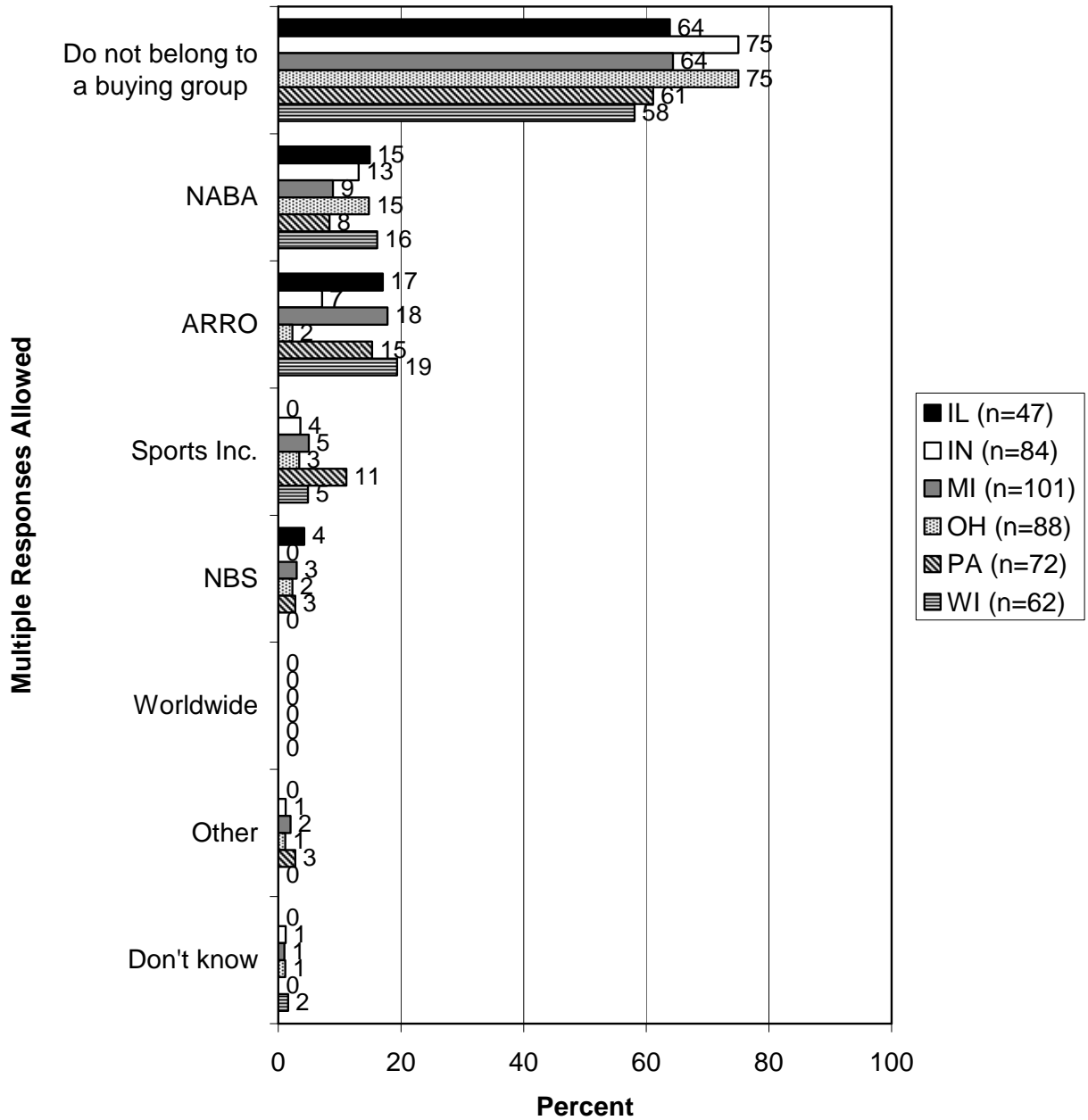
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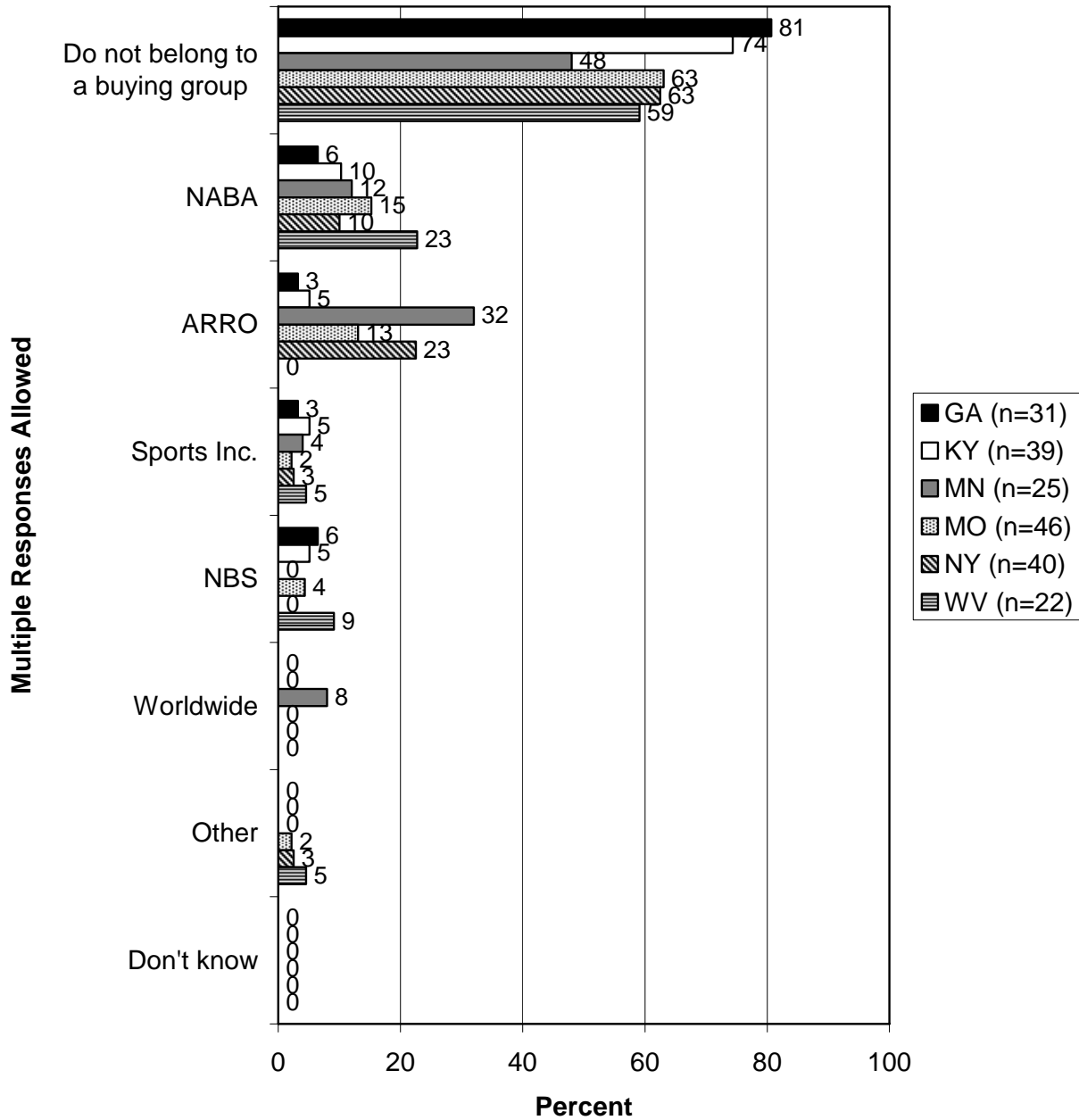
Q49. Do you belong to any buying groups? If so, which ones?



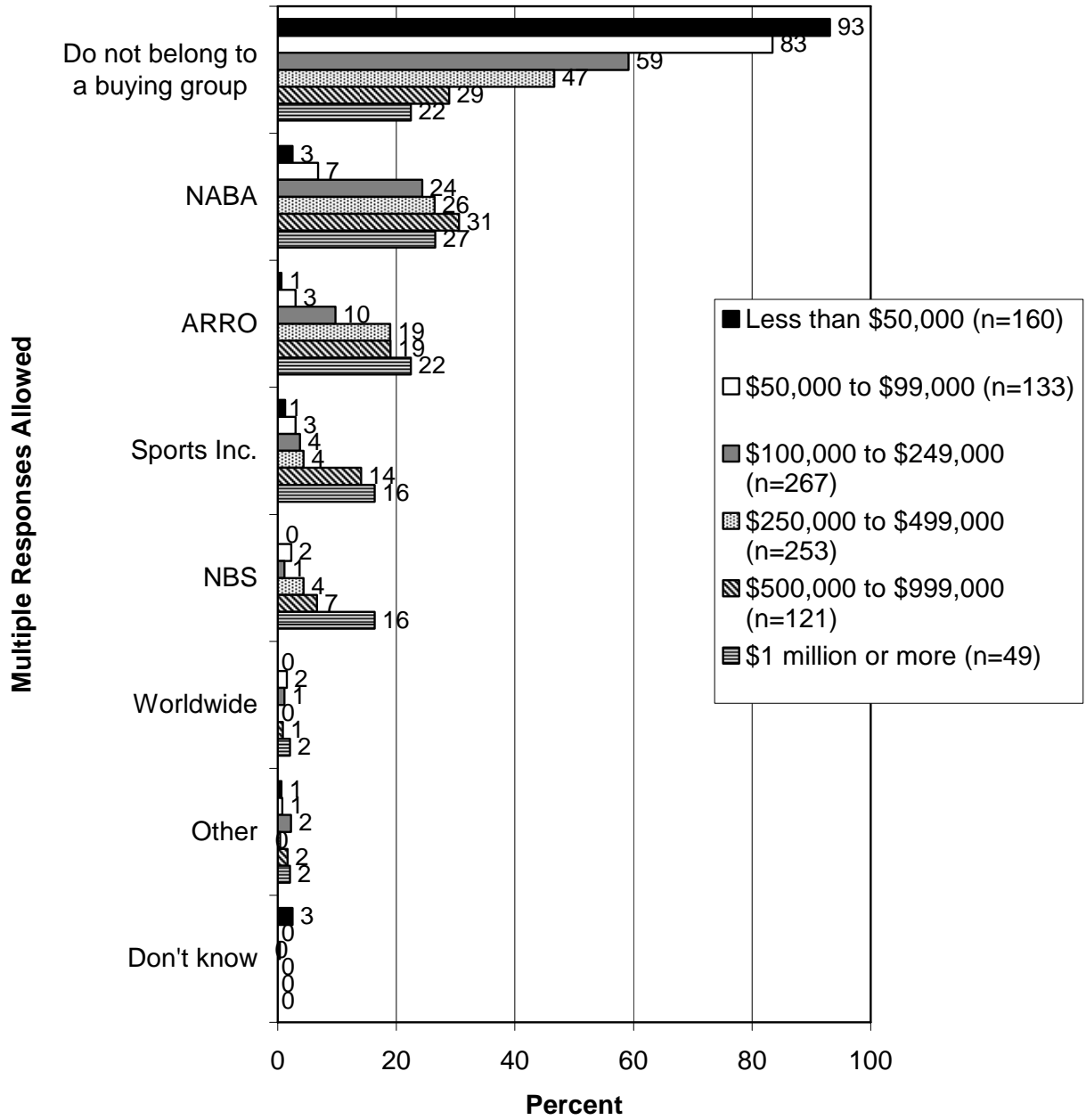
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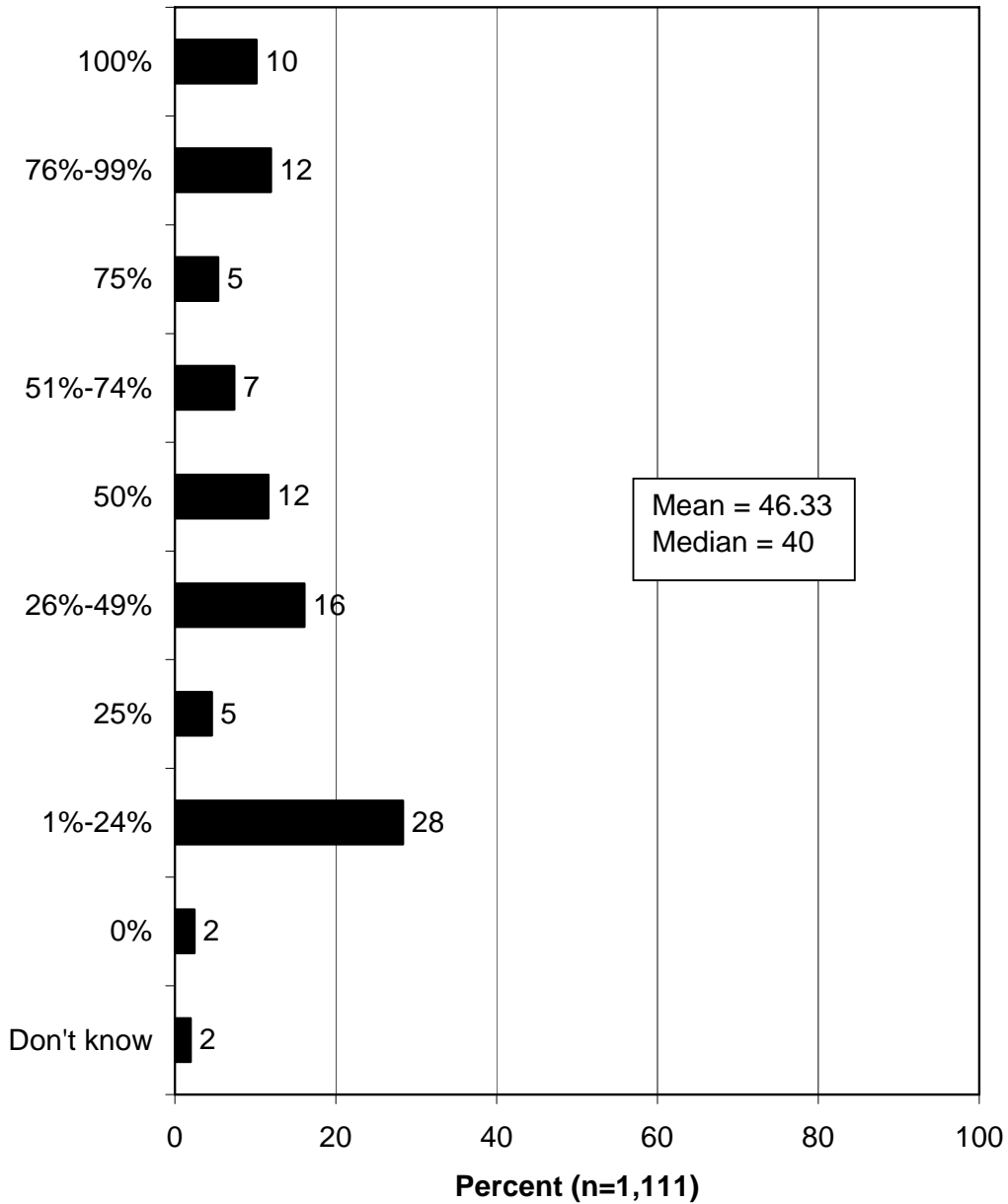
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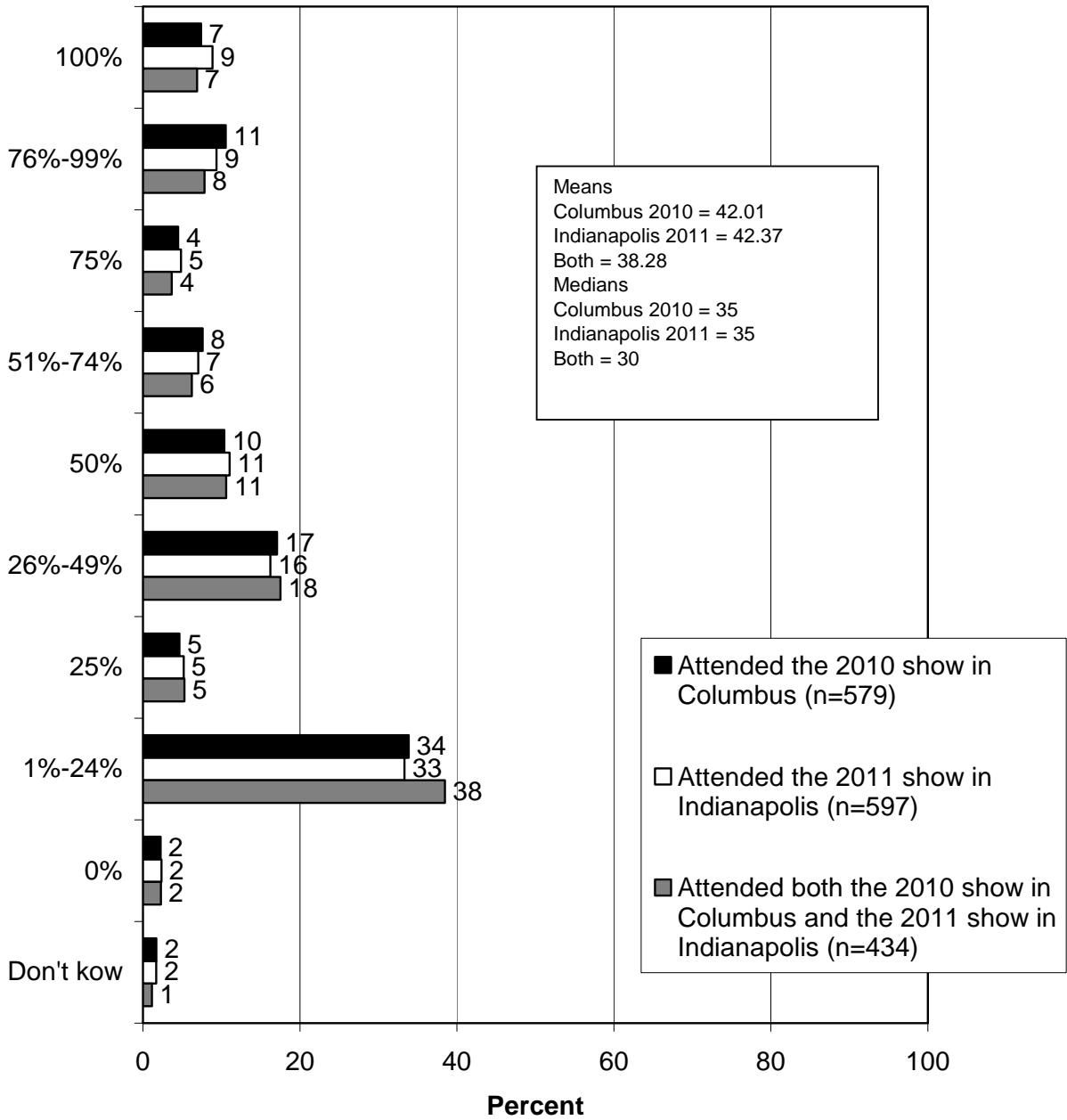
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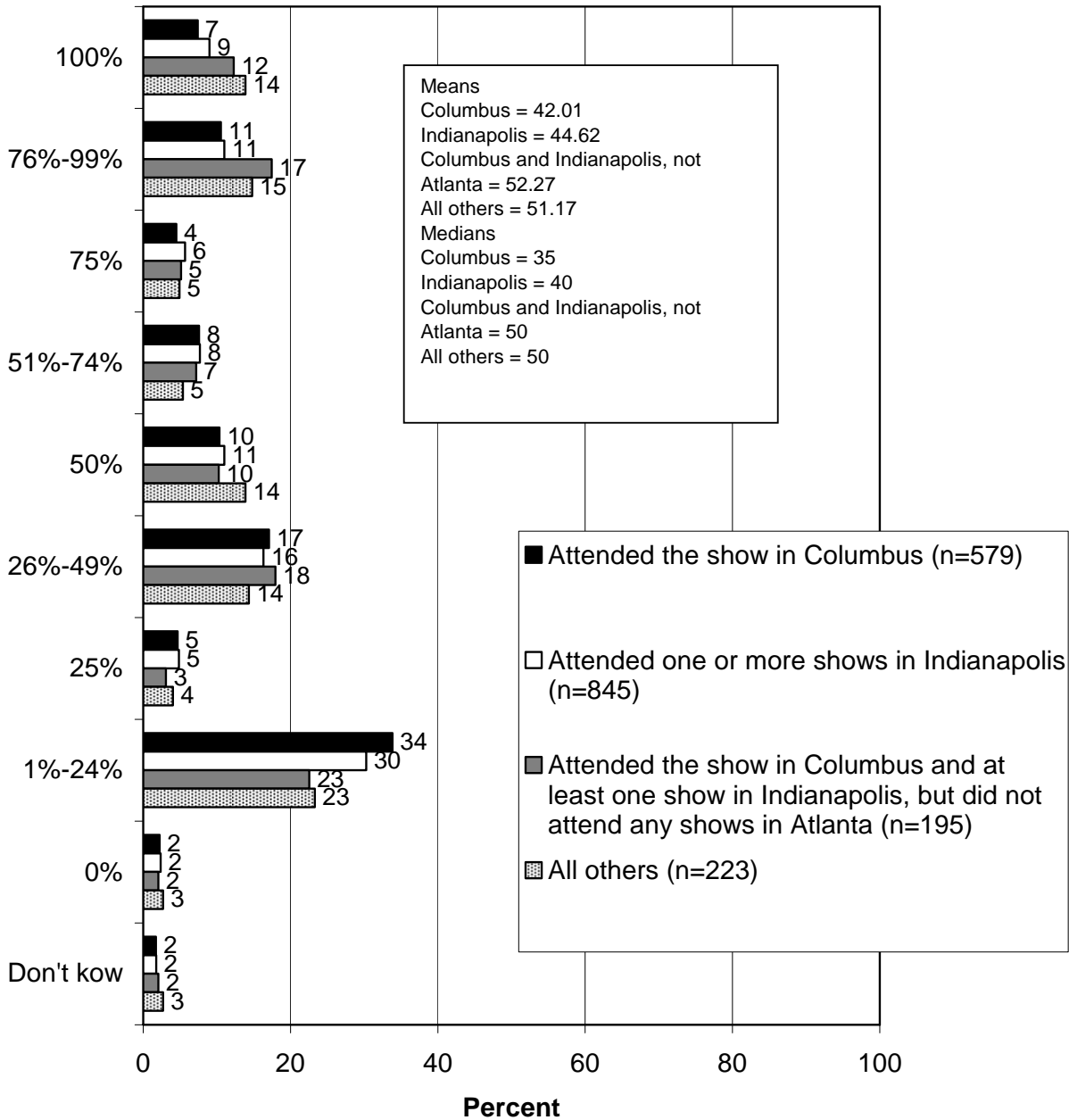
Q72. Approximately what percentage of your archery and bowhunting-related product is purchased through a distributor?



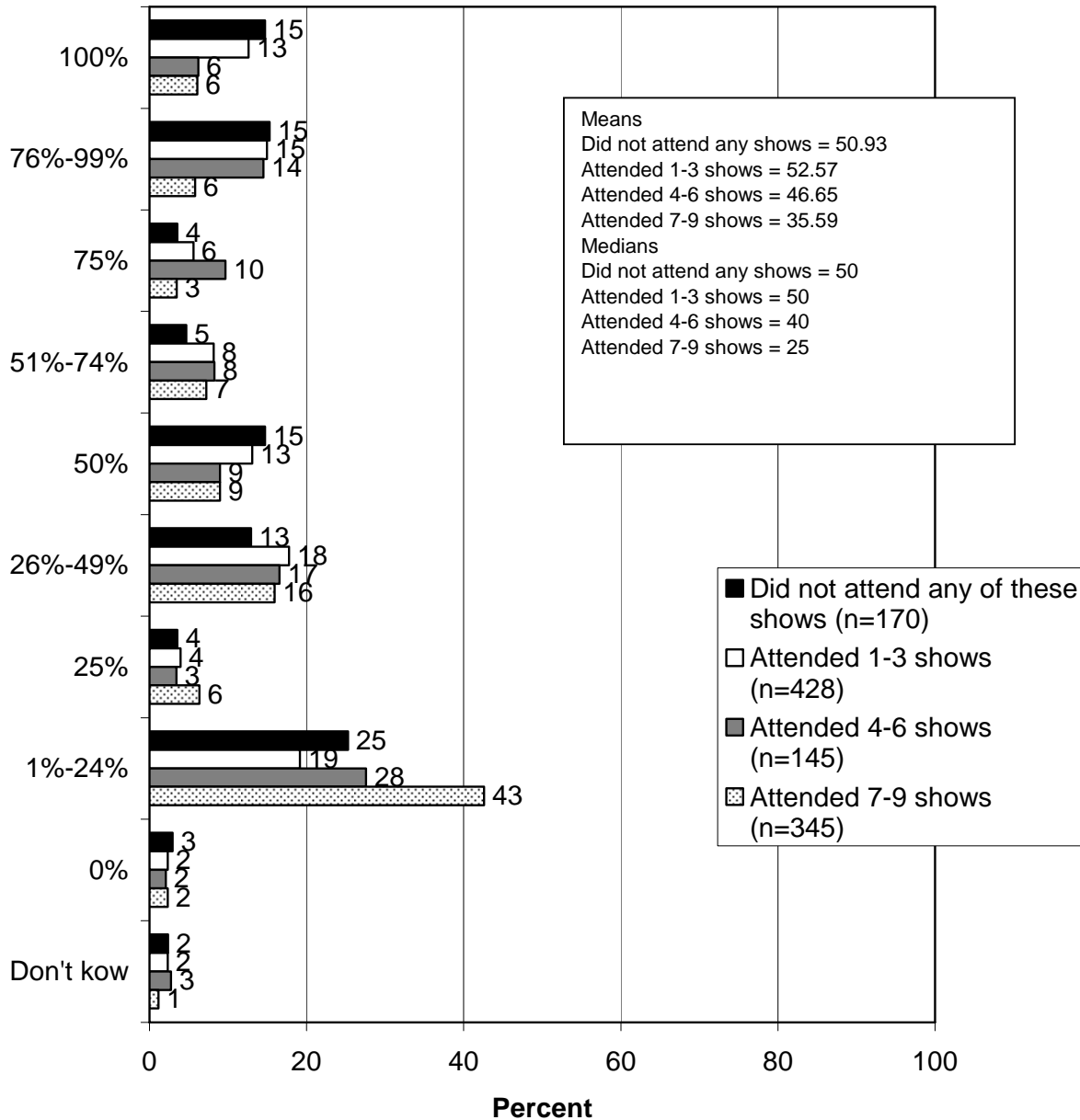
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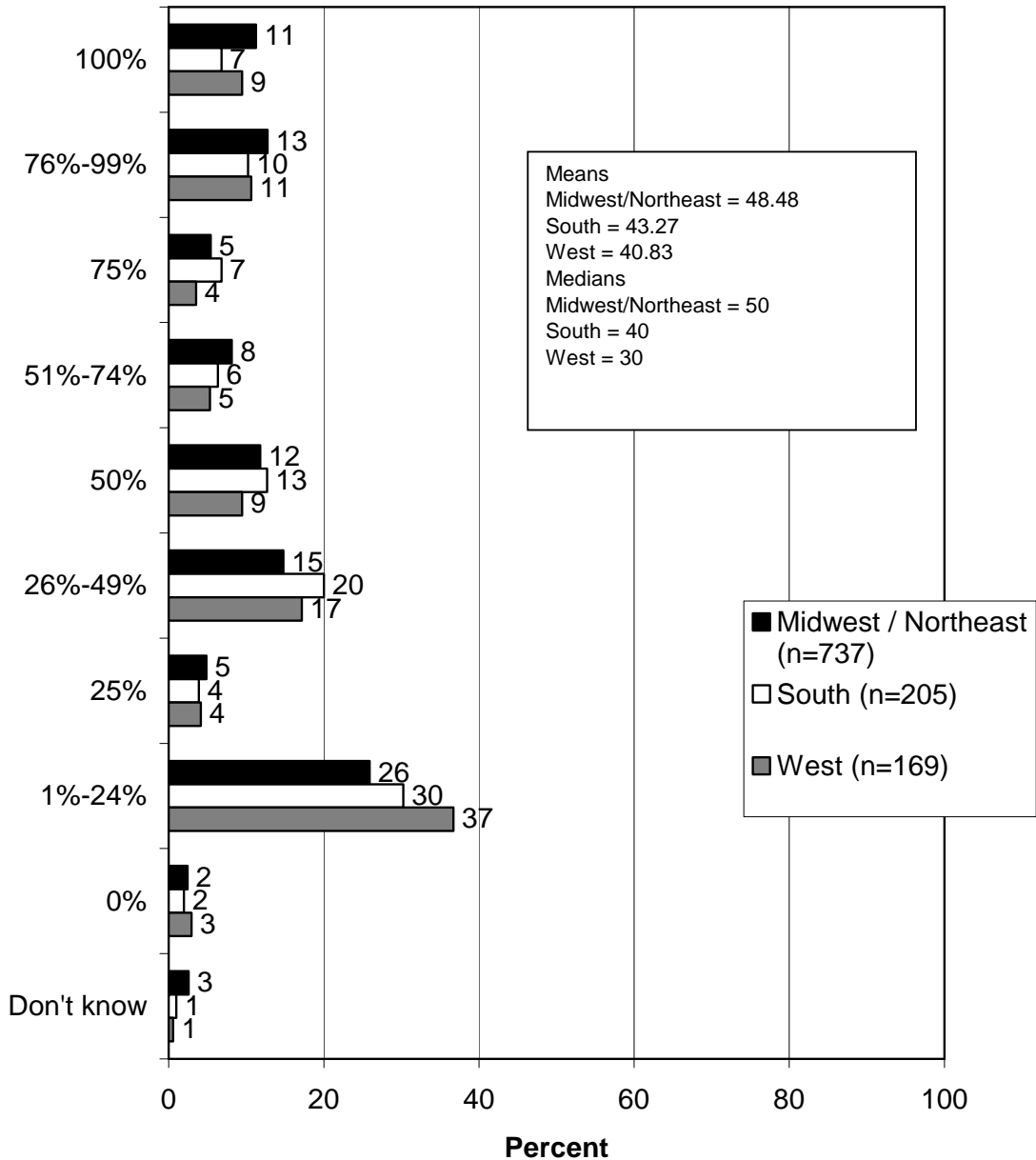
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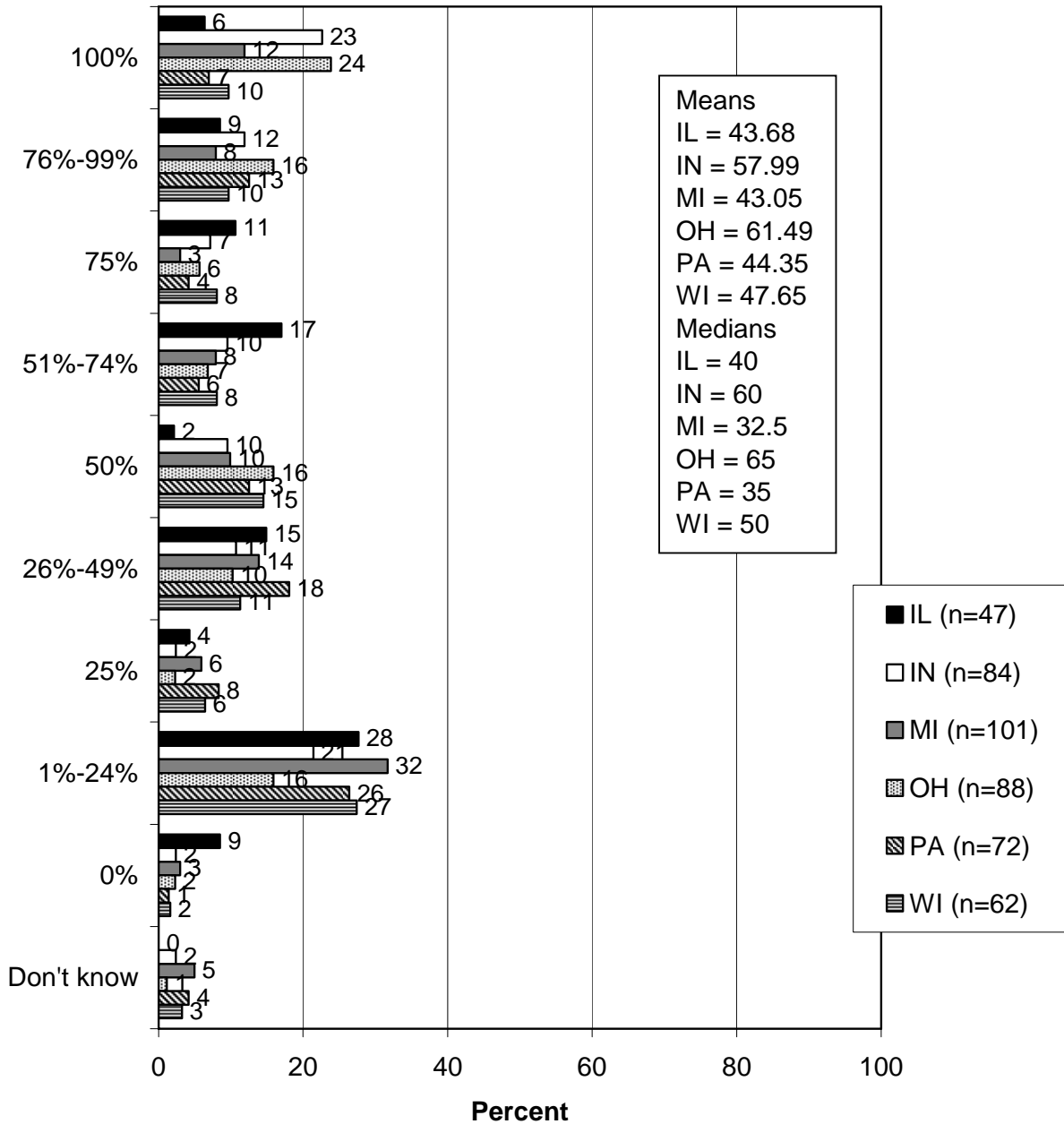
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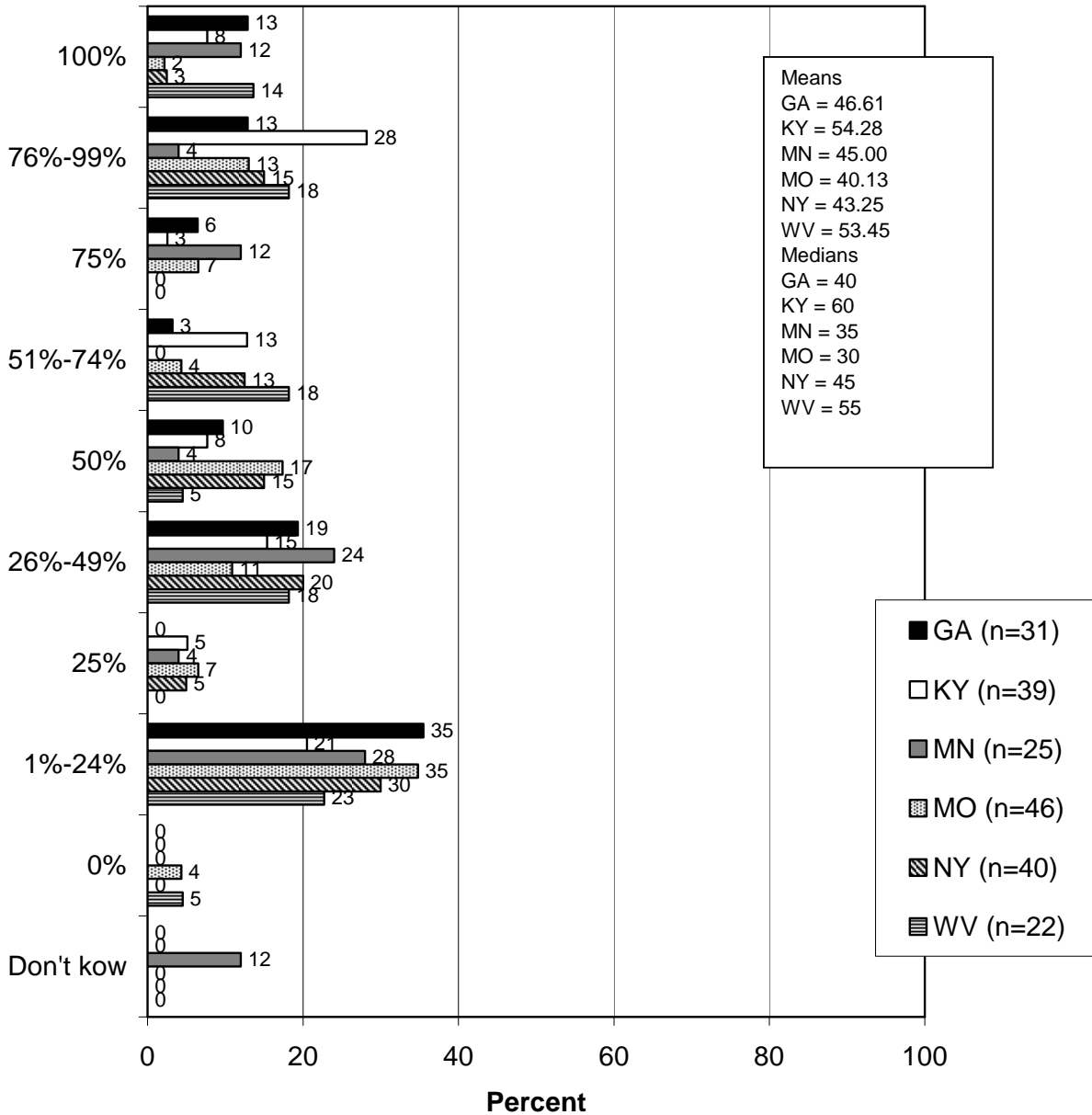
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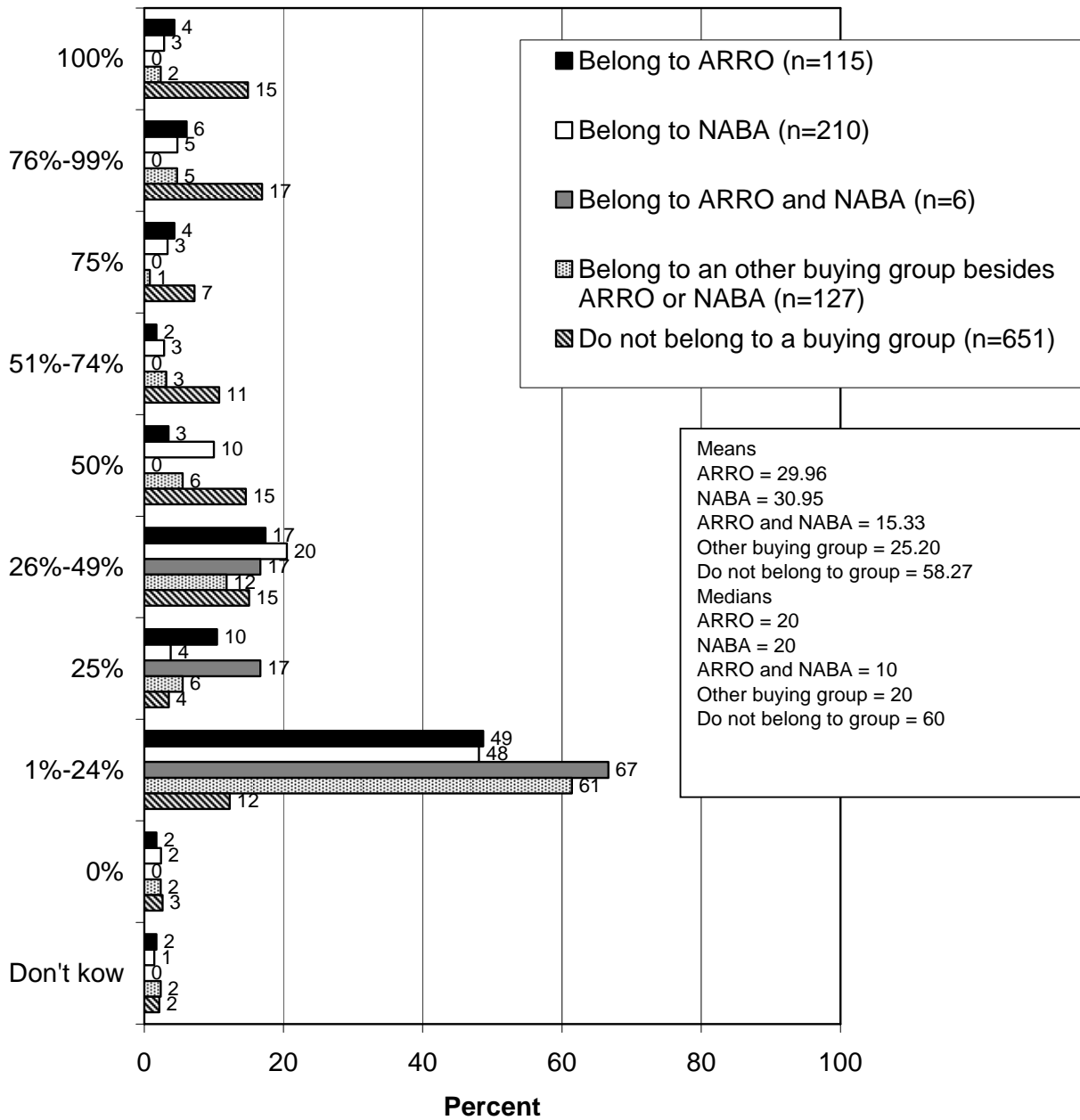
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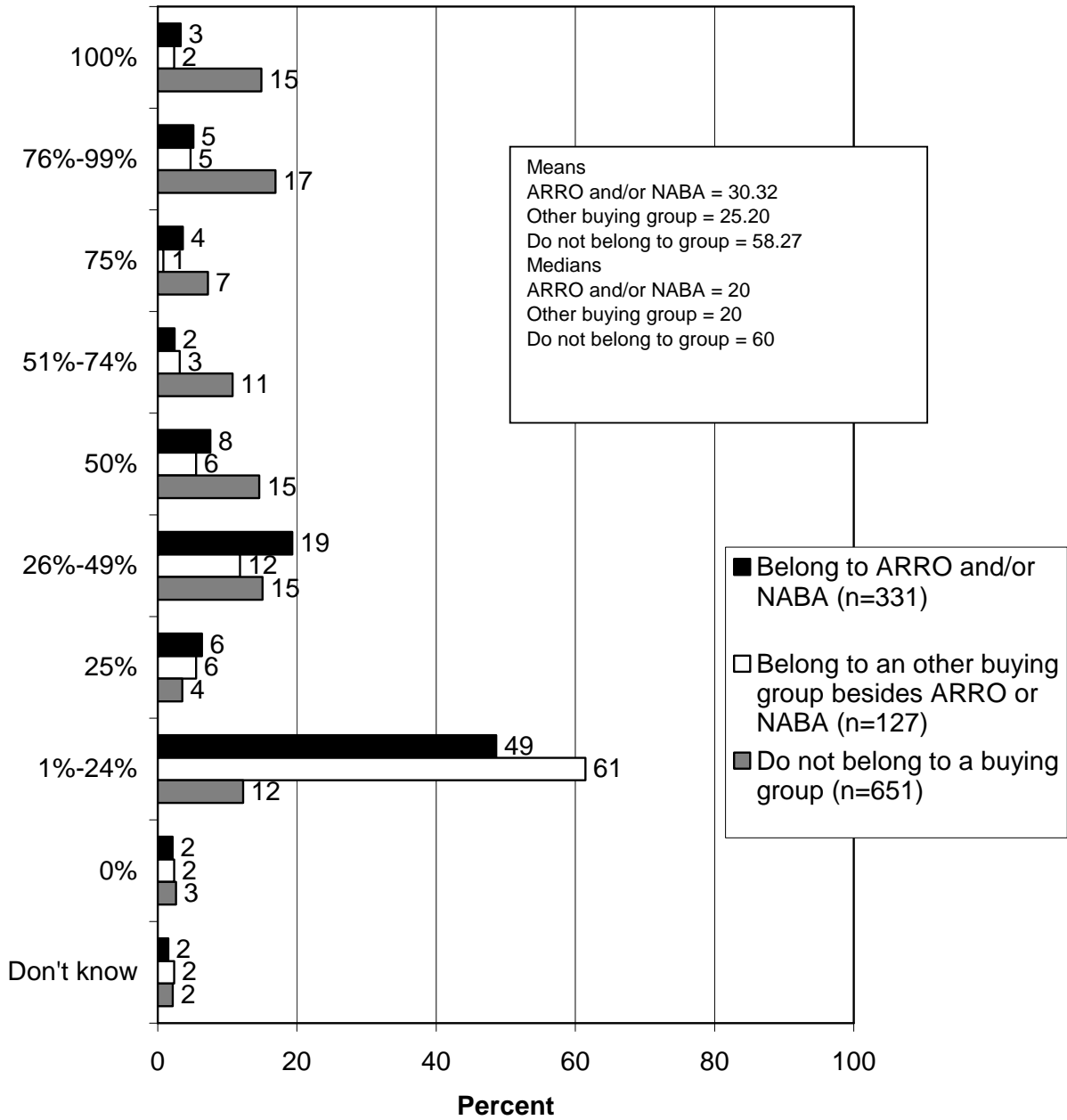
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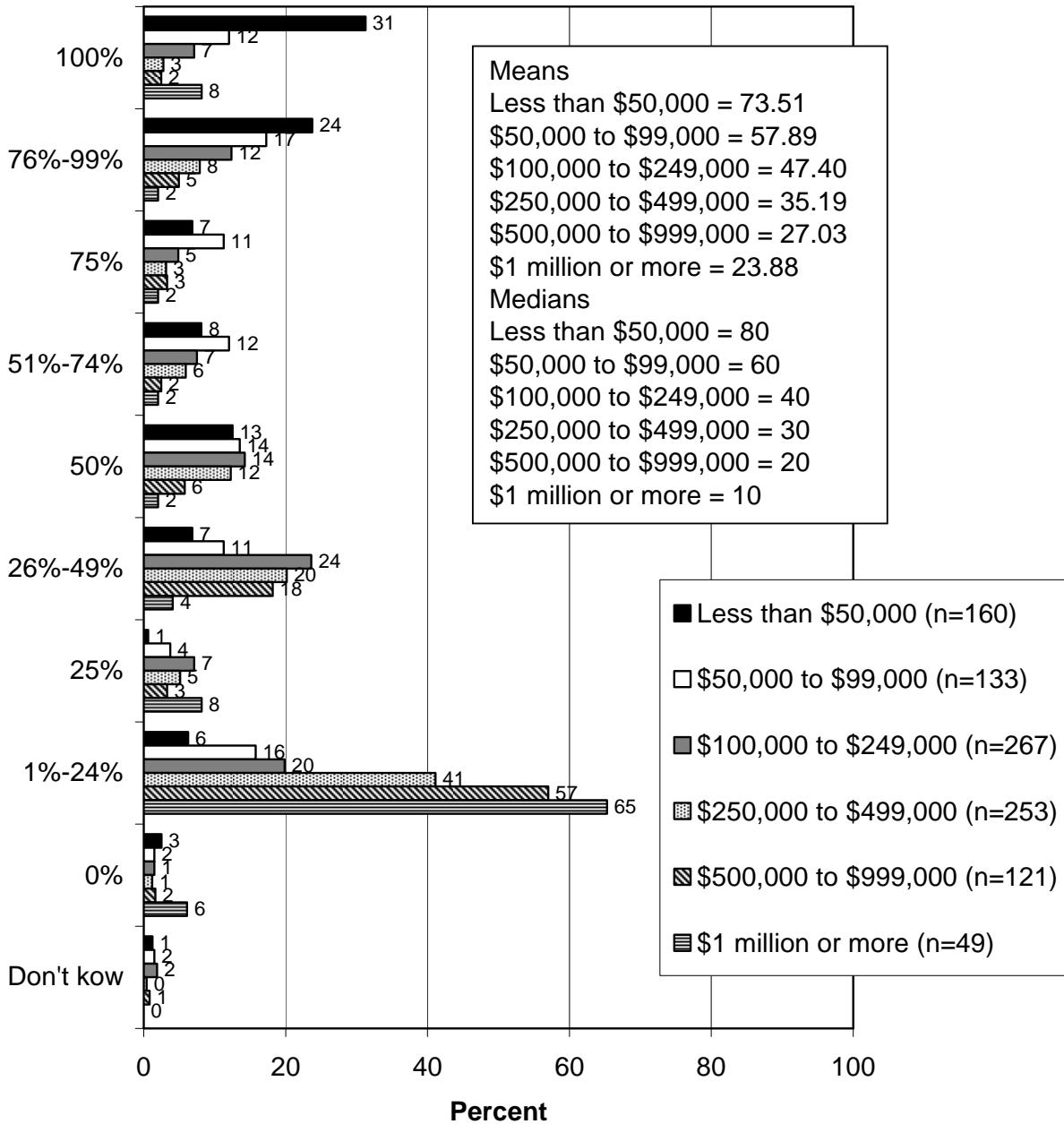
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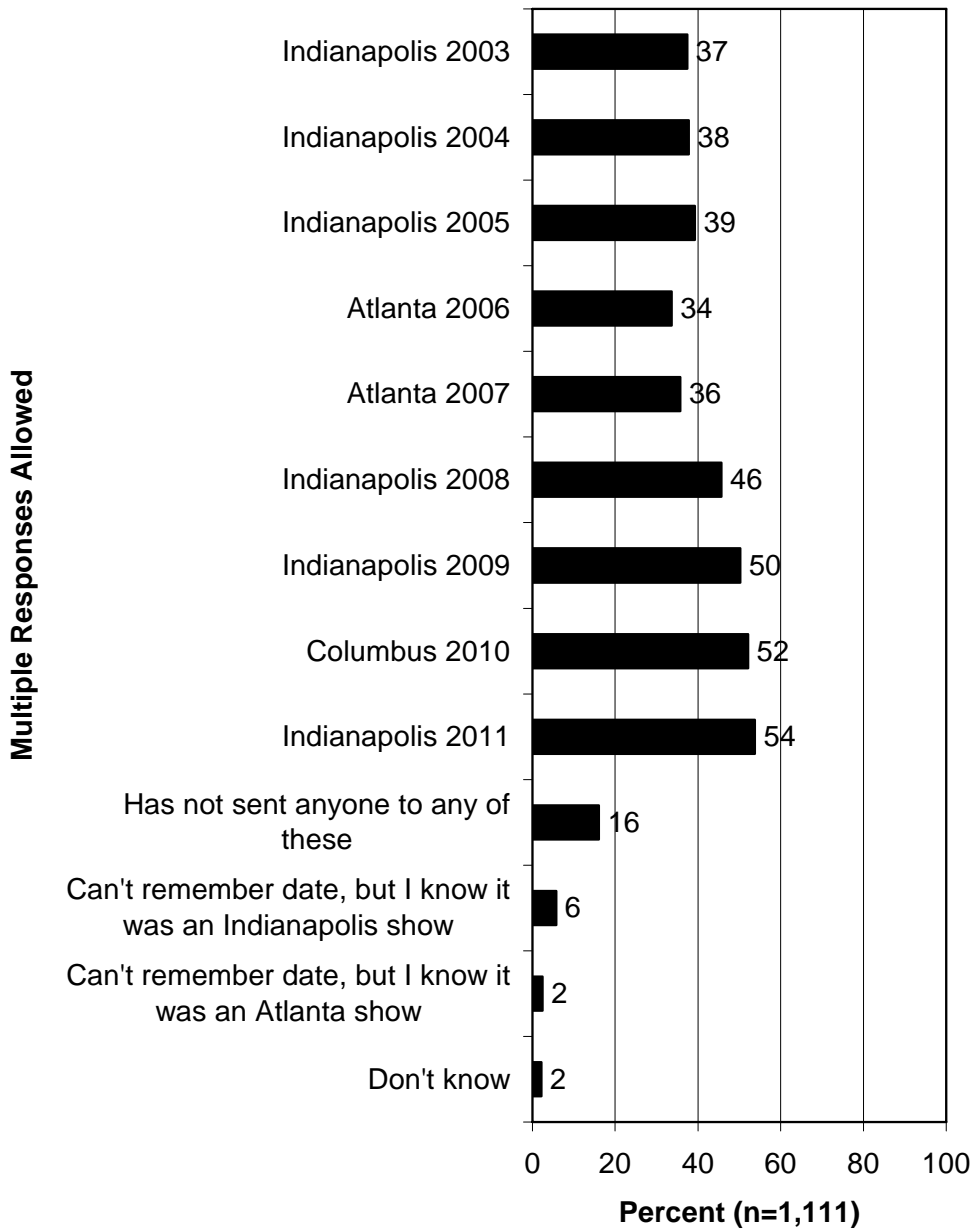


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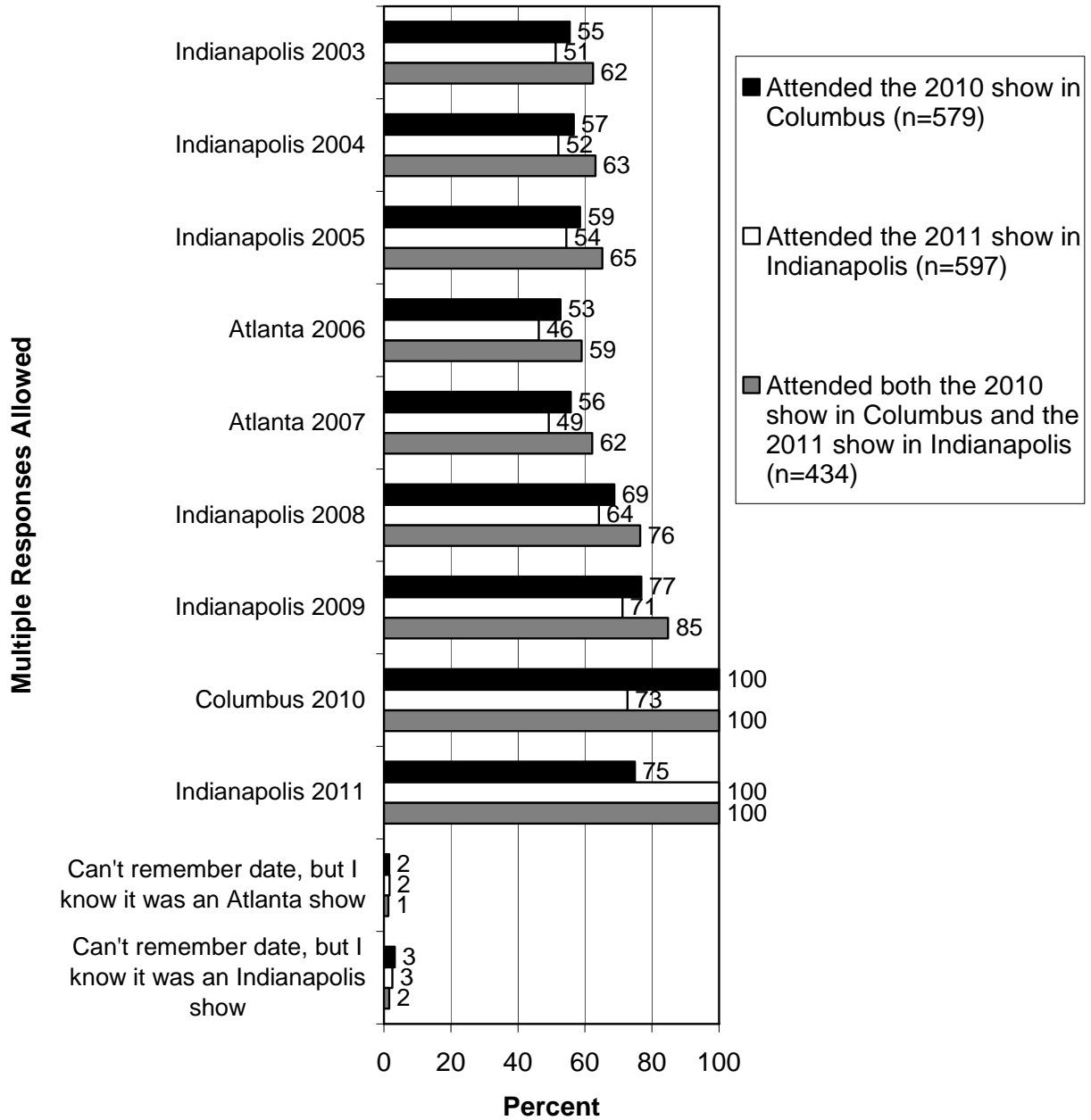


ATTENDANCE AT PREVIOUS ATA TRADE SHOWS AND LIKELIHOOD TO ATTEND FUTURE ATA TRADE SHOWS

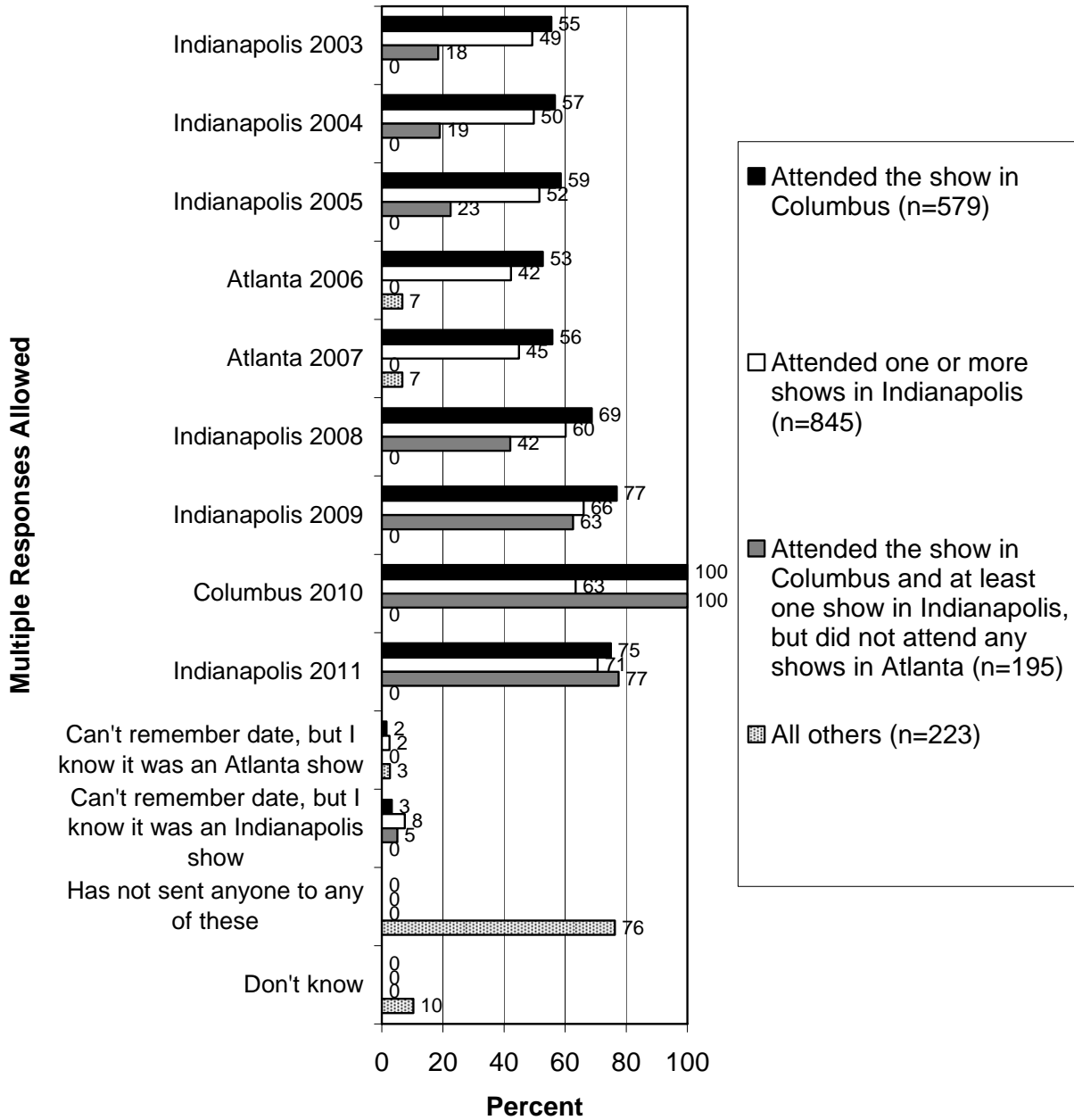
Q54. Which ATA Trade Shows has your store/business sent a representative since 2003?



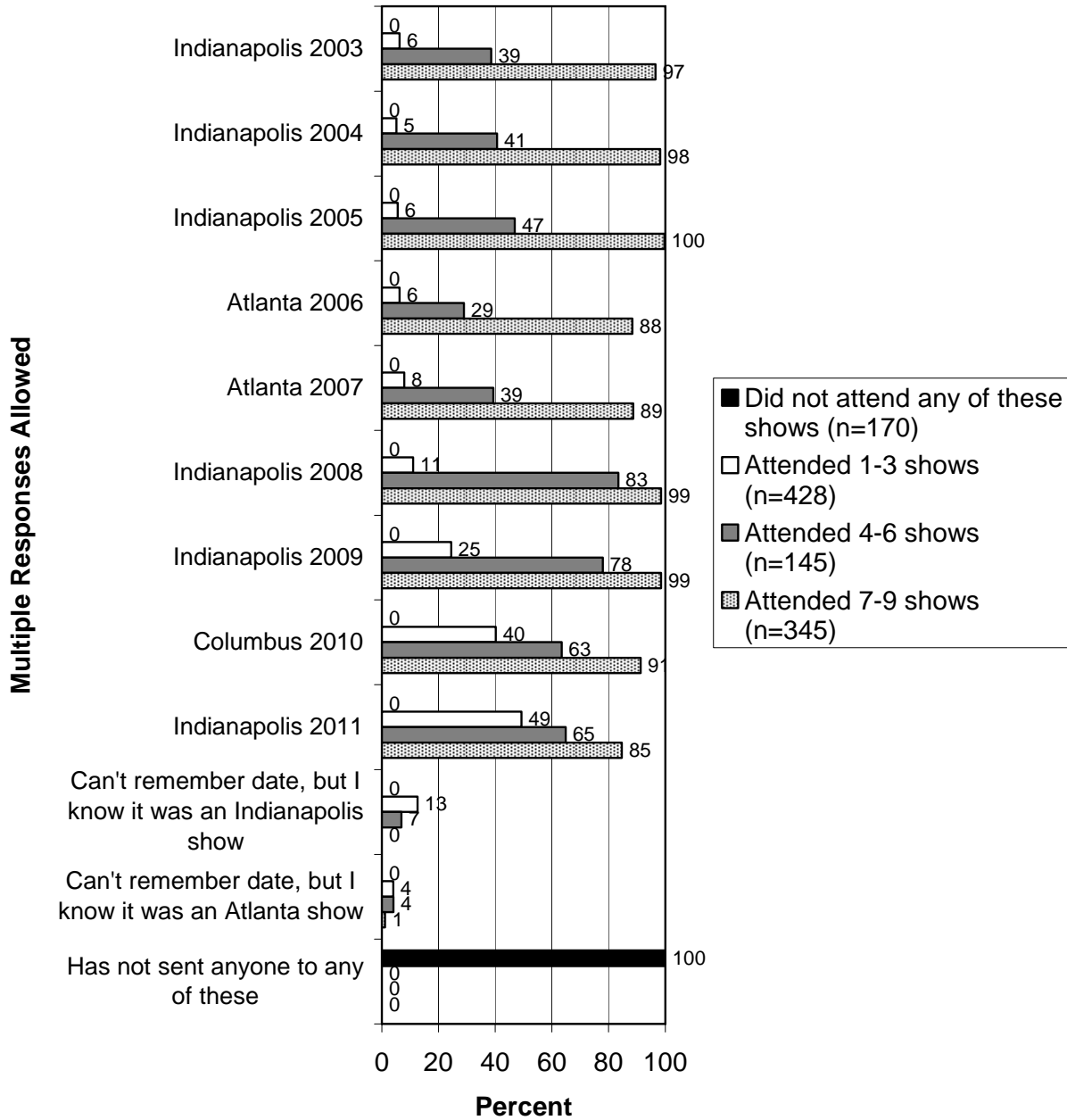
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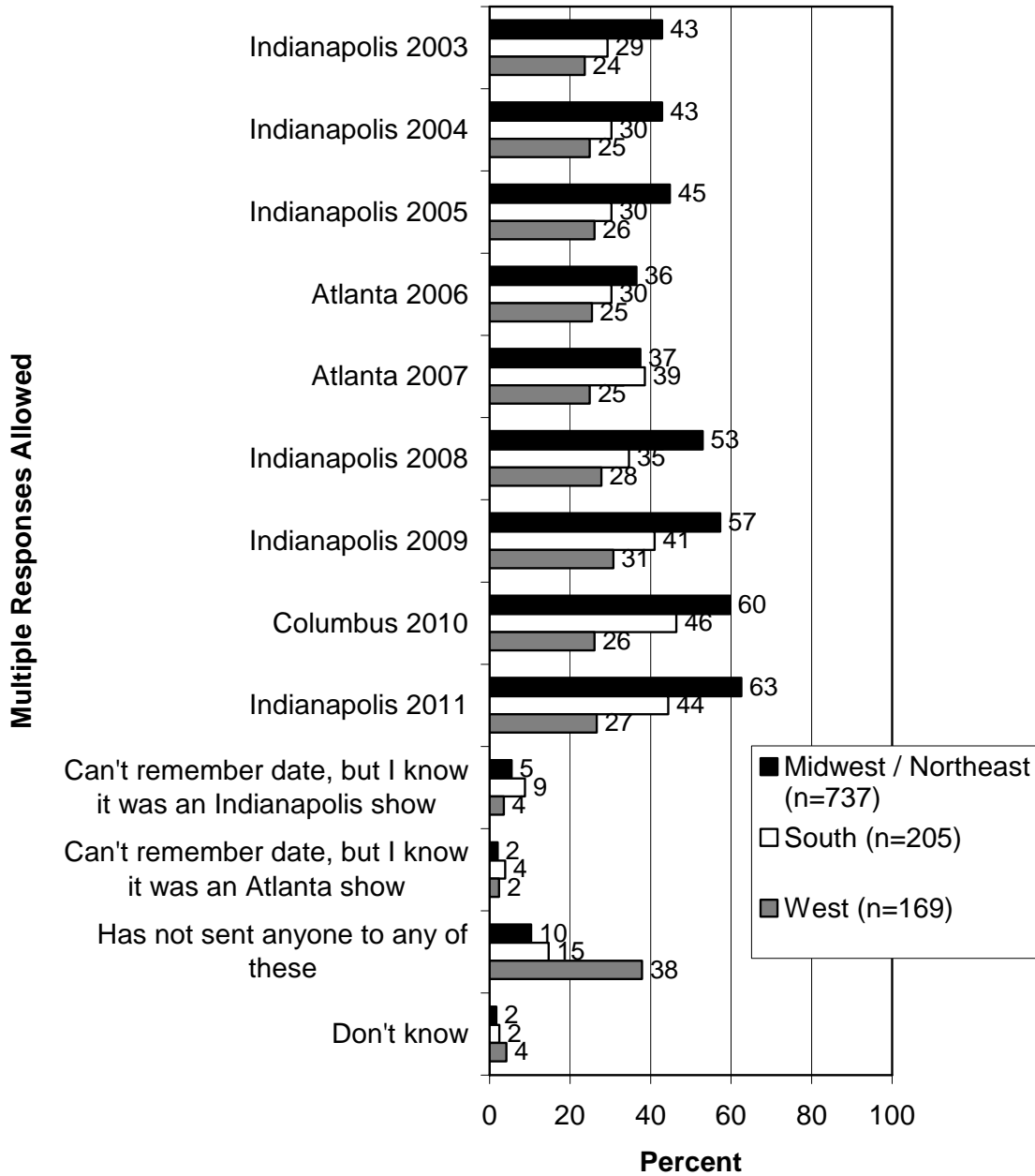
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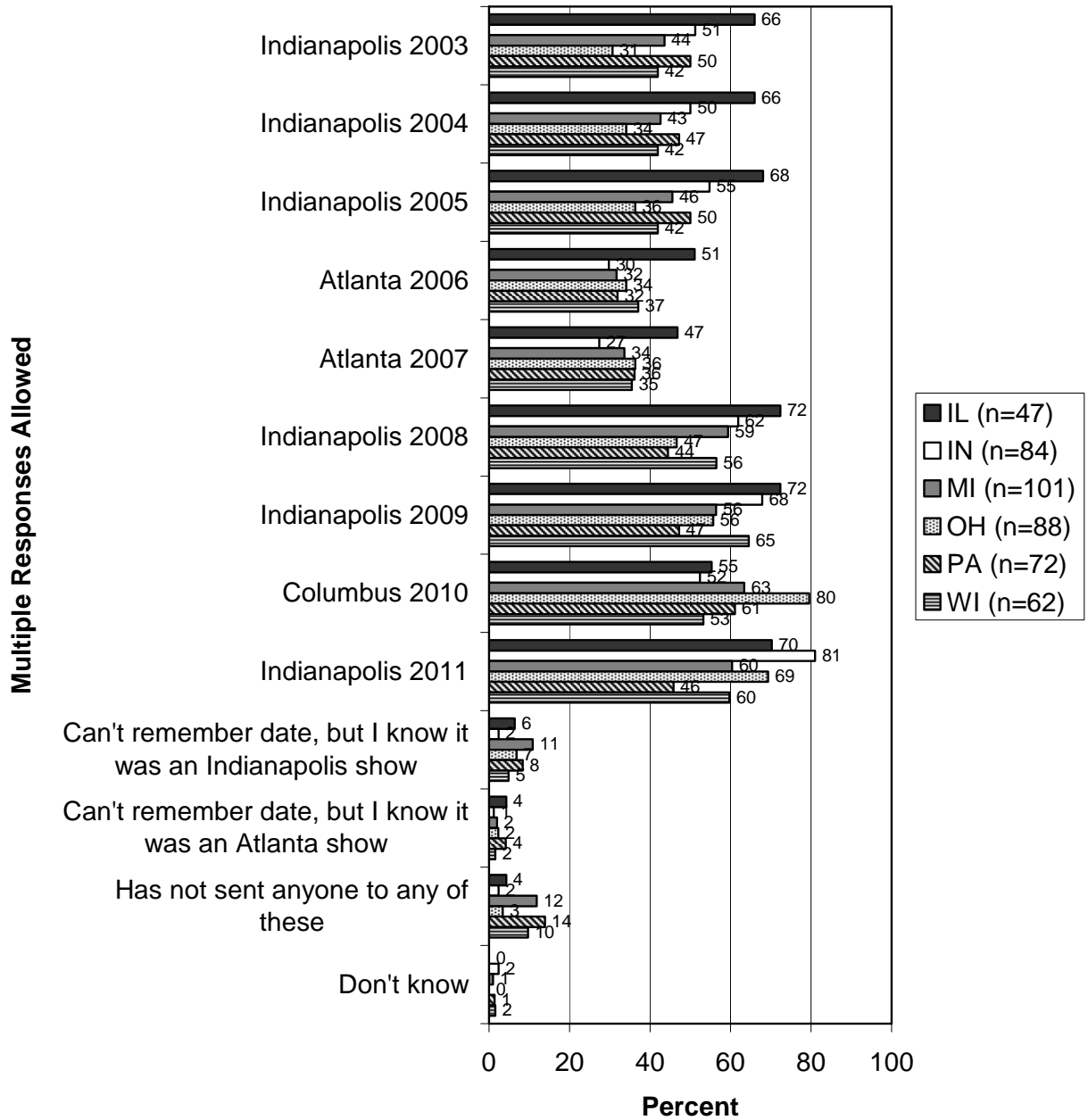
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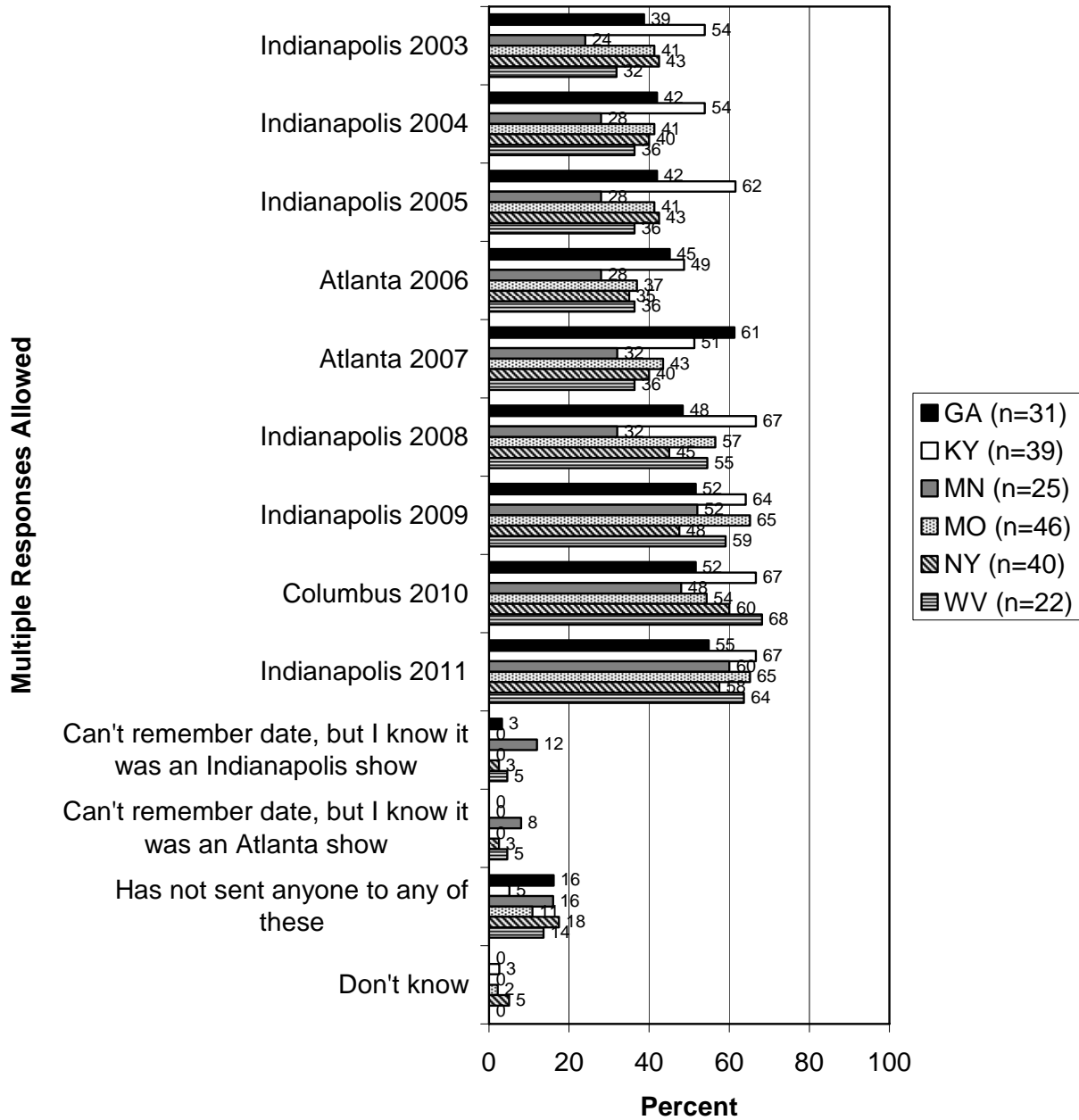
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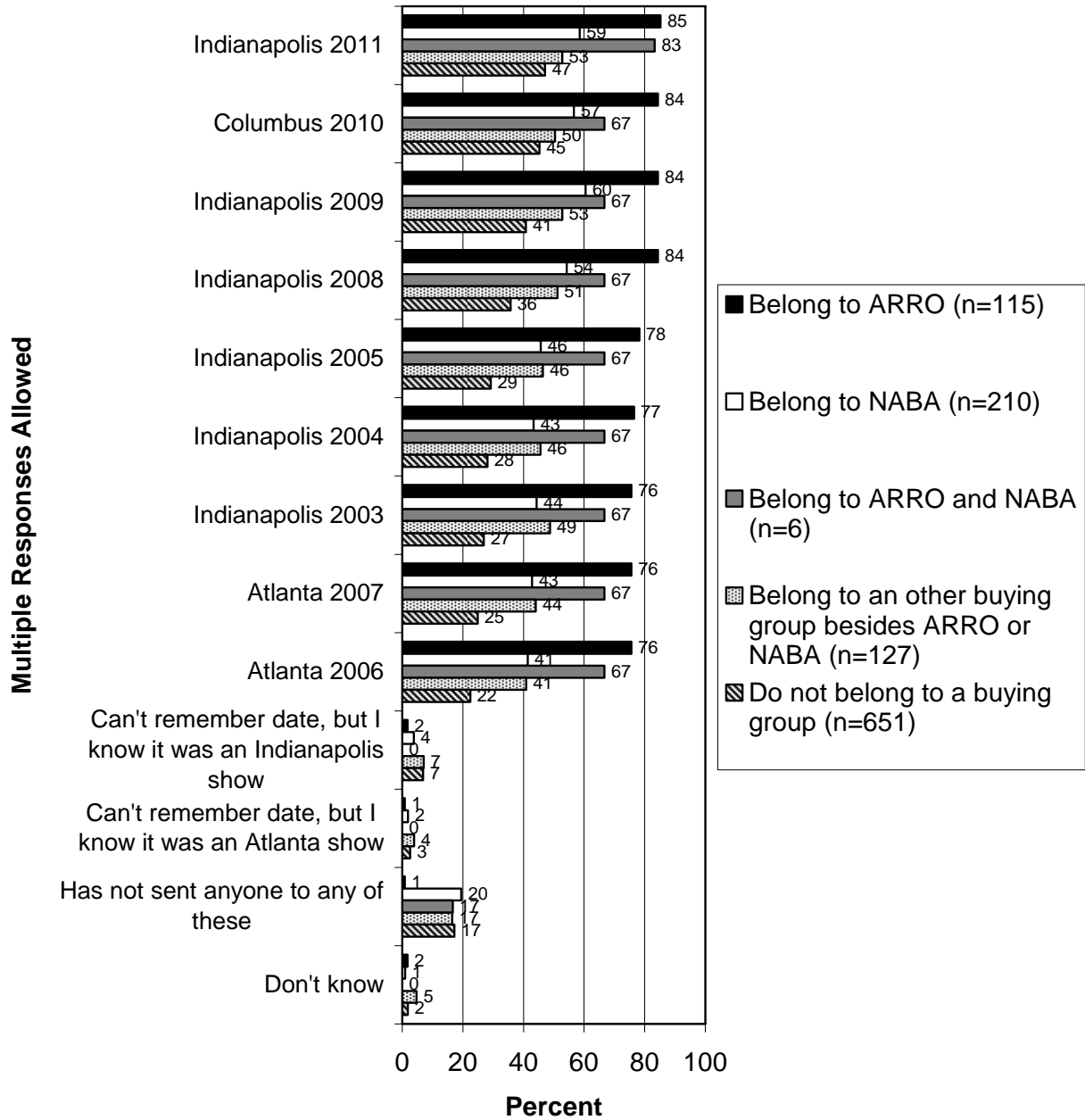
**Q54. Which ATA Trade Shows has your store/business sent a representative since 2003?
(Top 6 of 12 states with a large number of stores)**



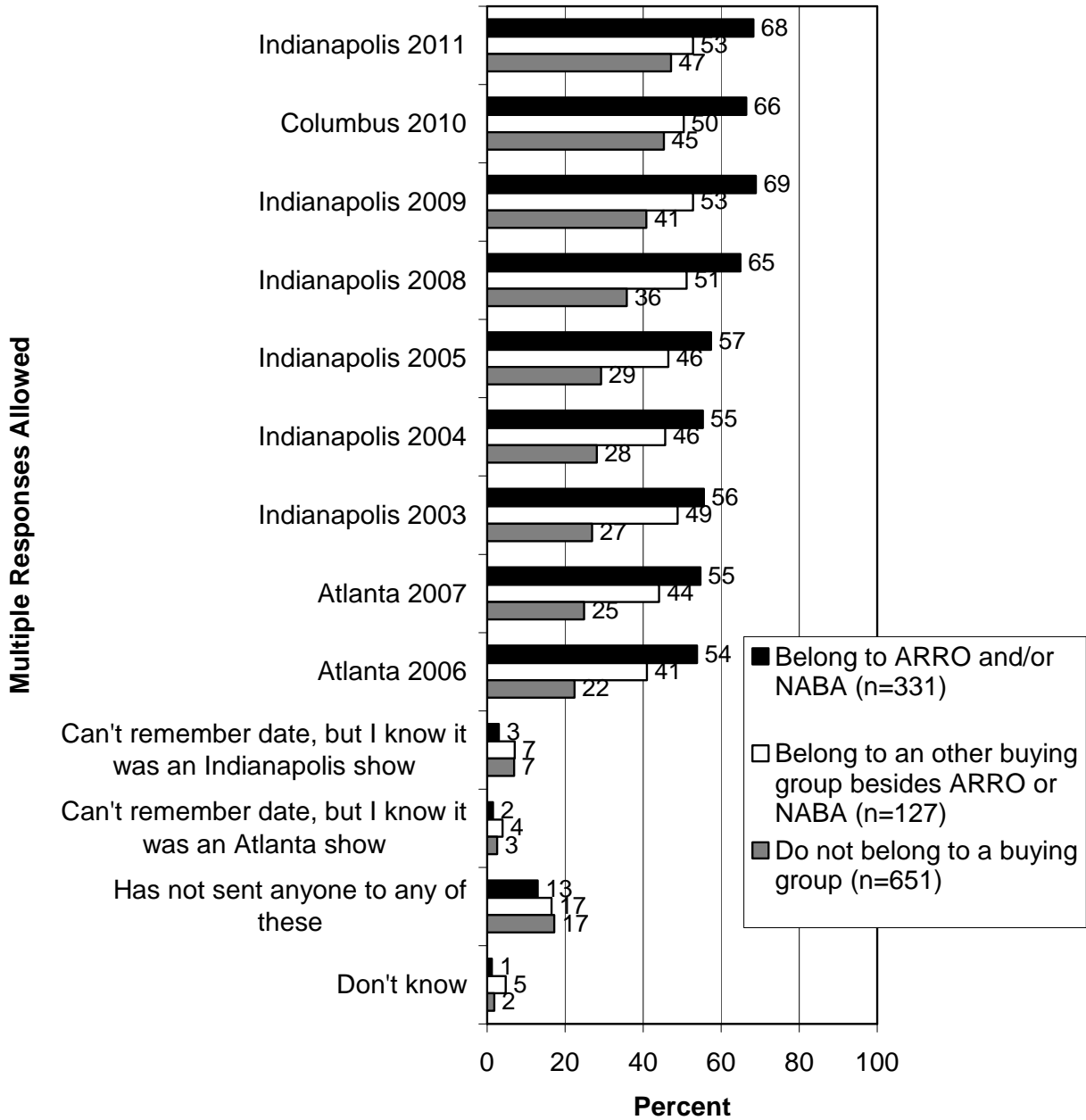
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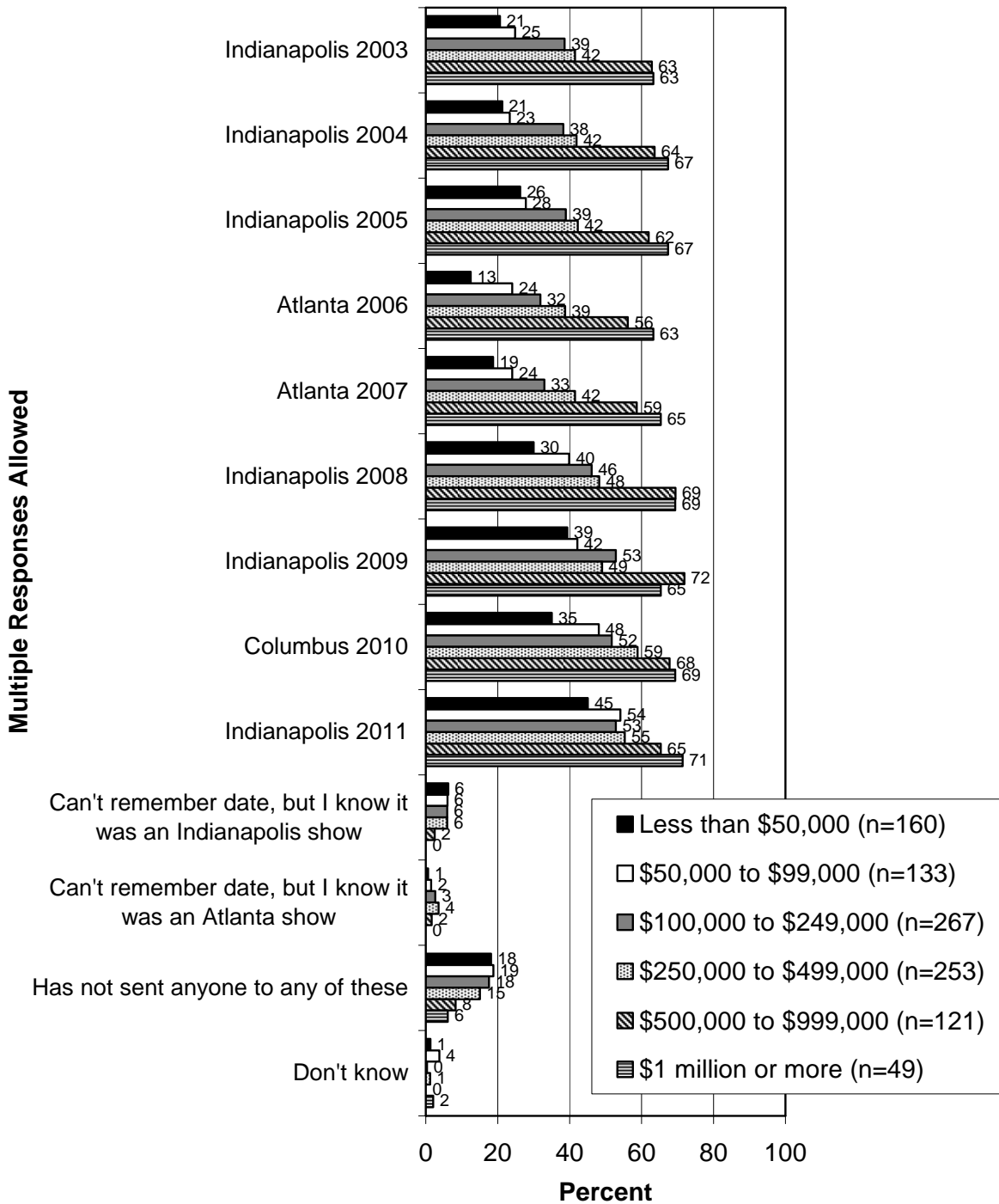
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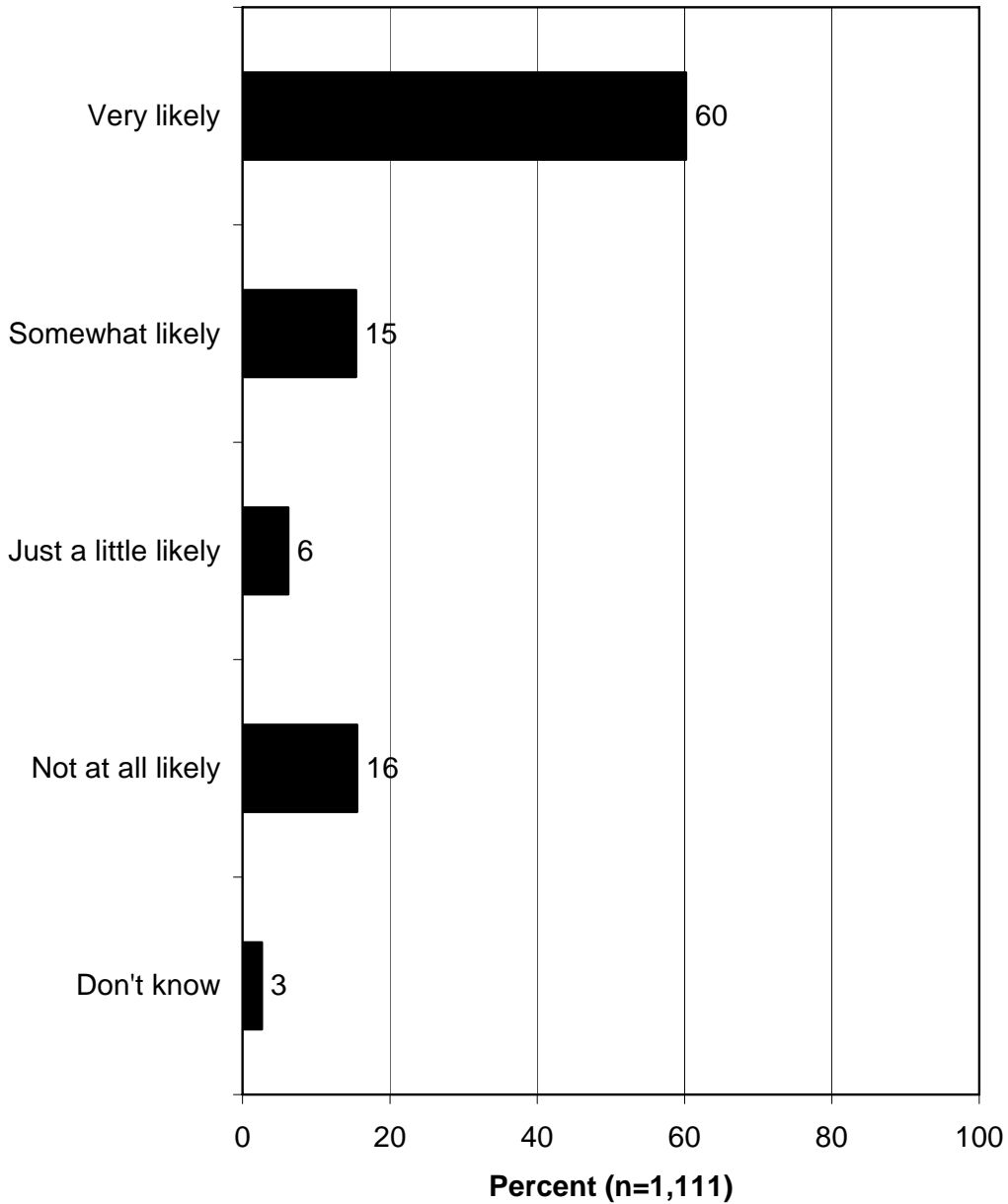
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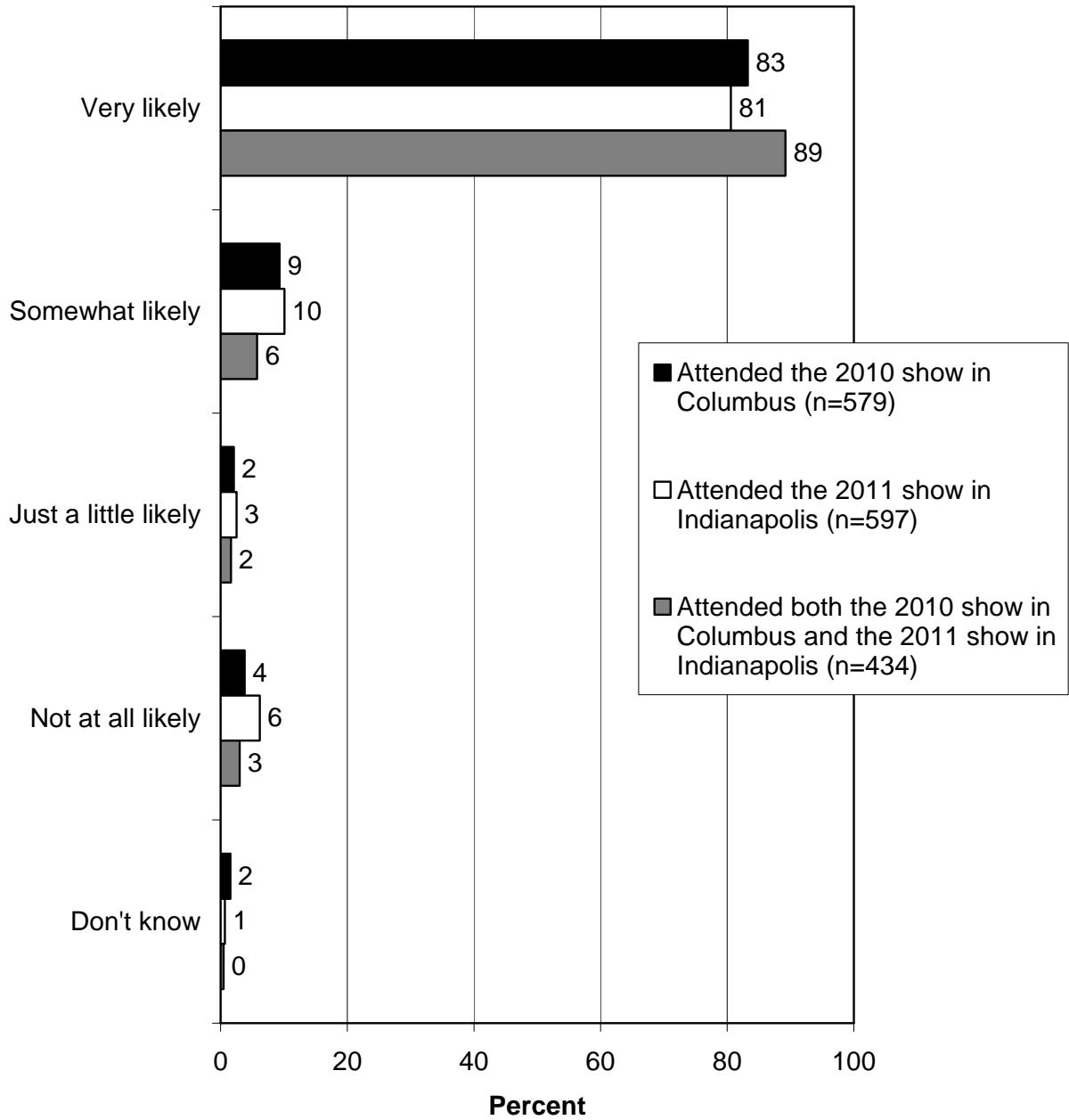
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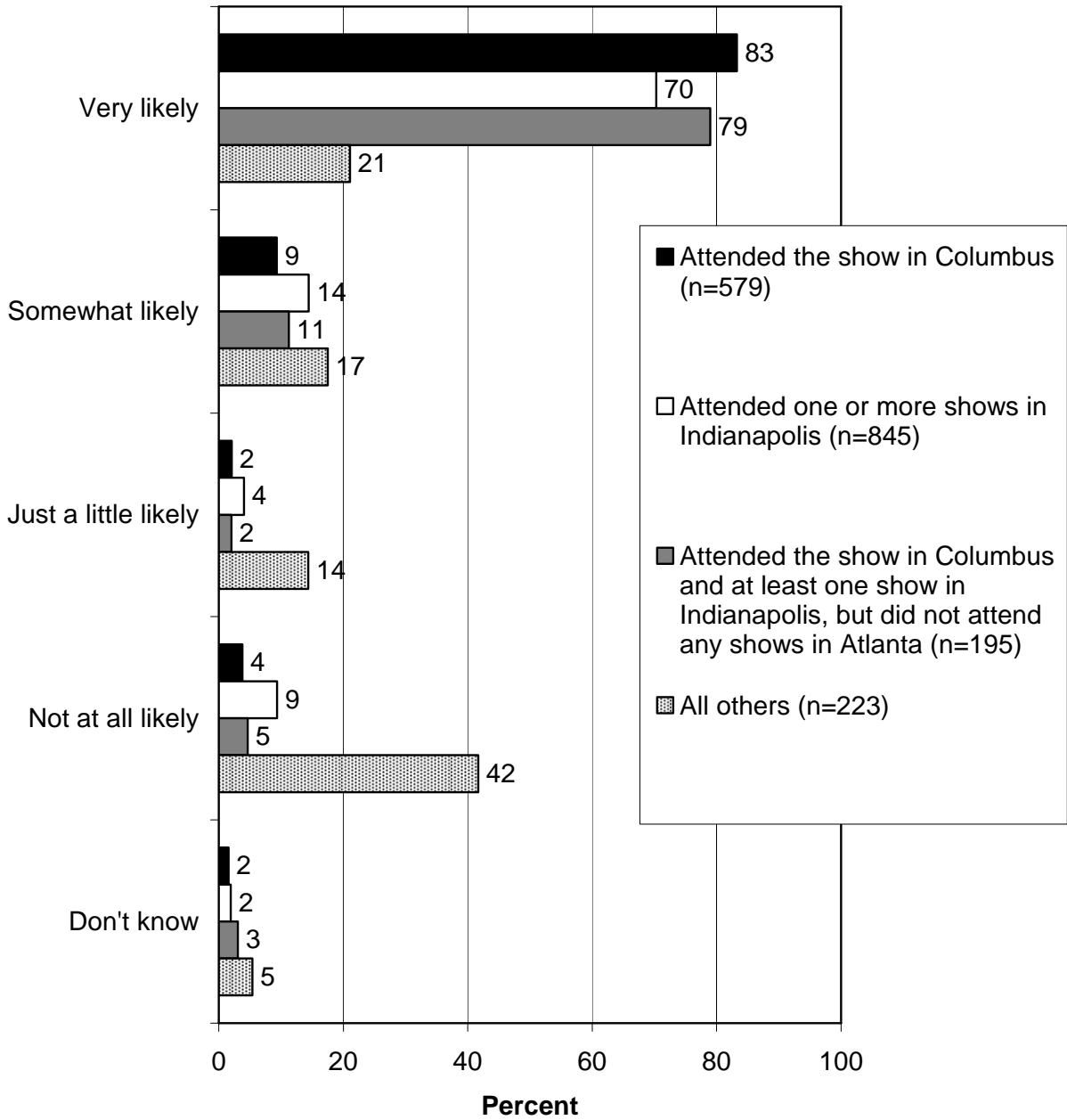
Q55. How likely is it that your store/business will send someone to the 2012 ATA Trade Show in Columbus?



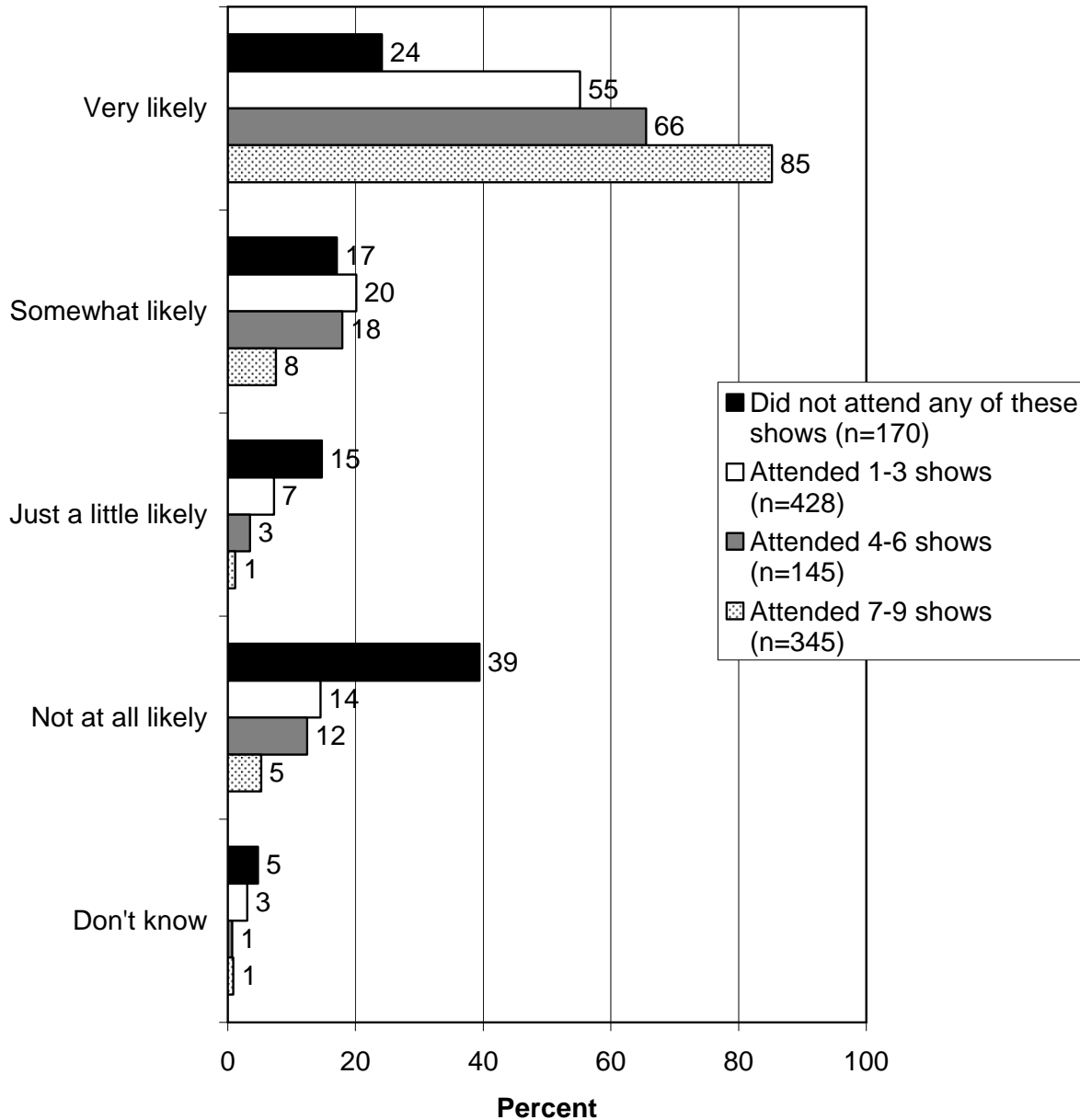
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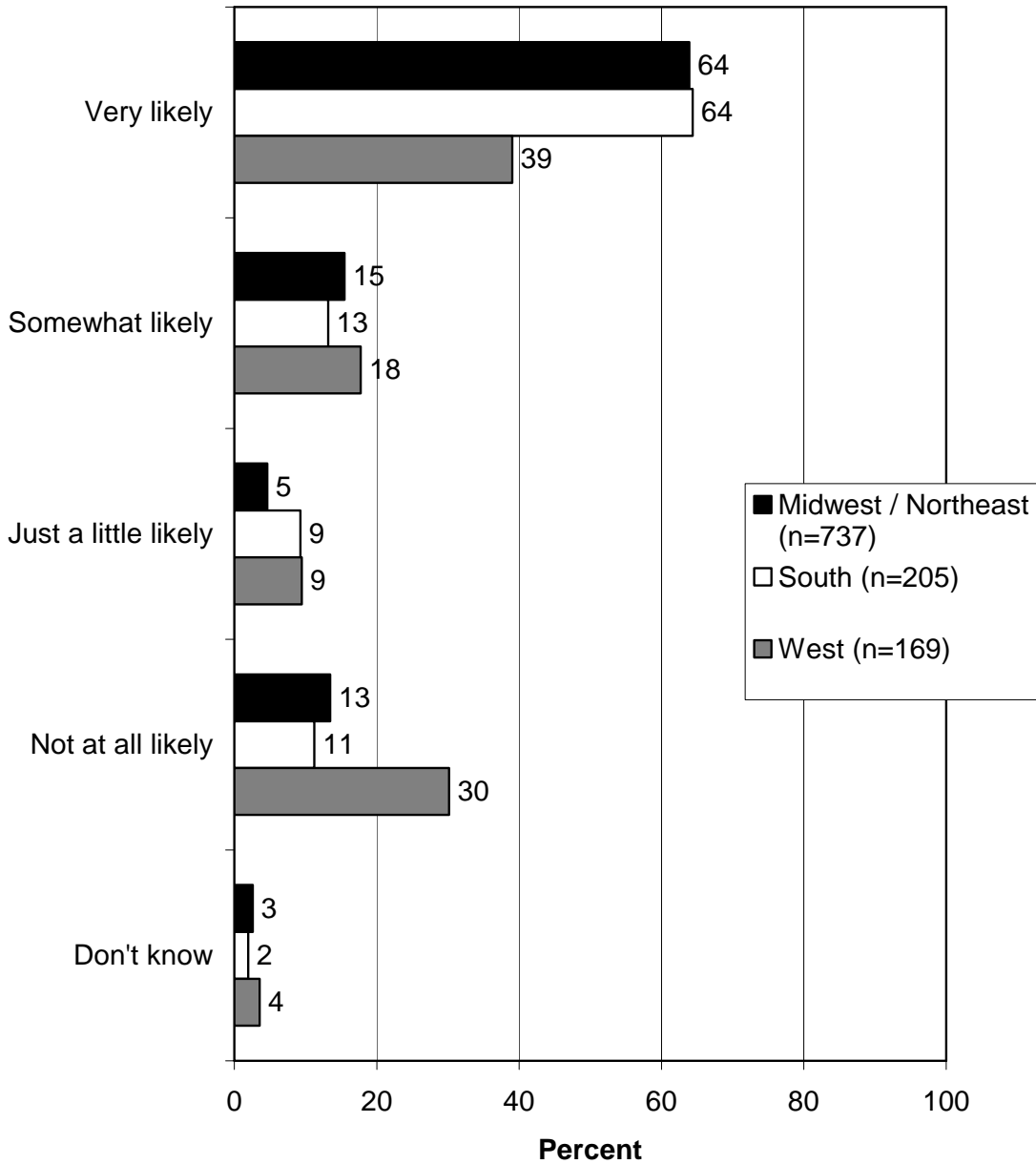
Q55. How likely is it that your store/business will send someone to the 2012 ATA Trade Show in Columbus?



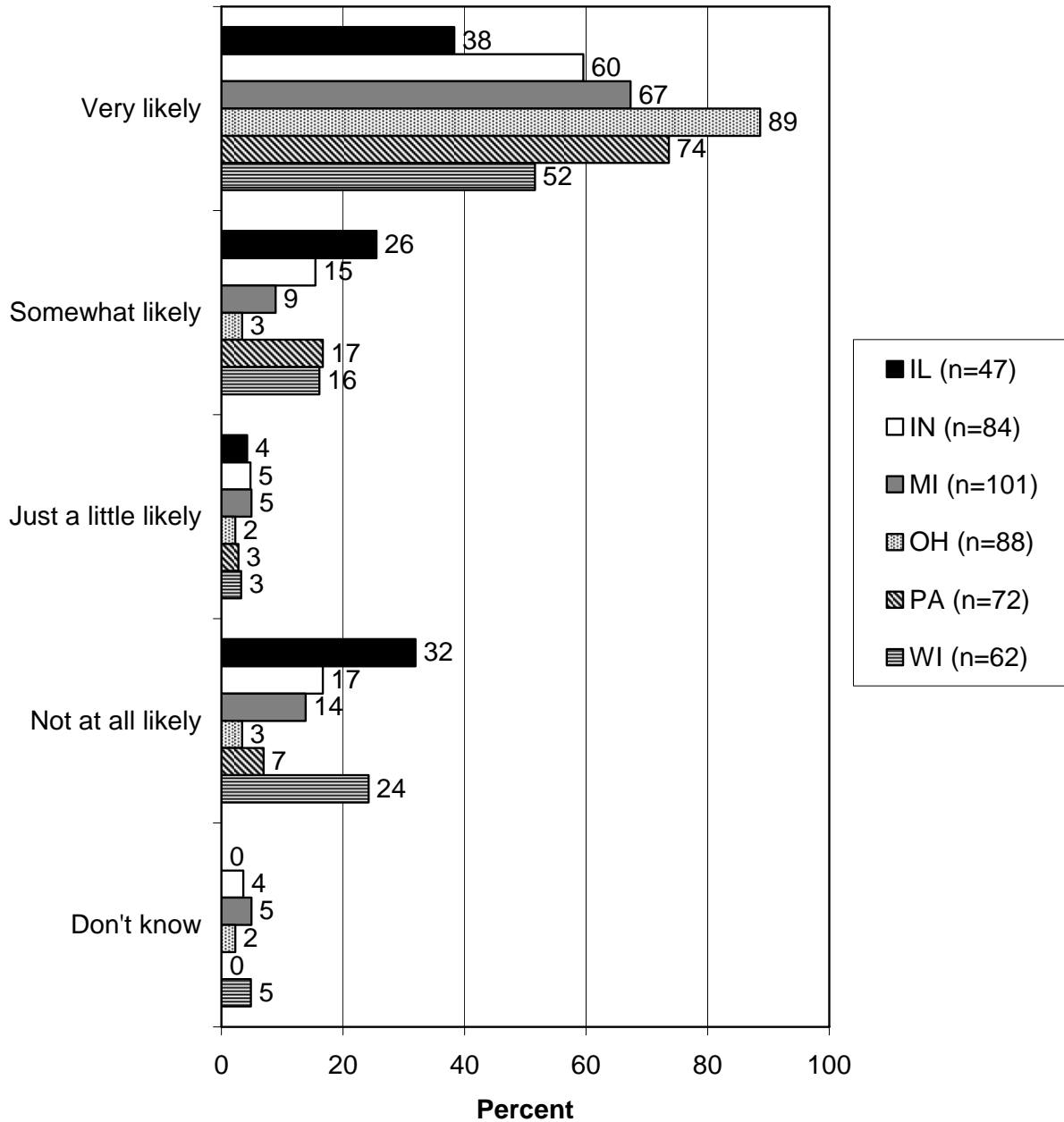
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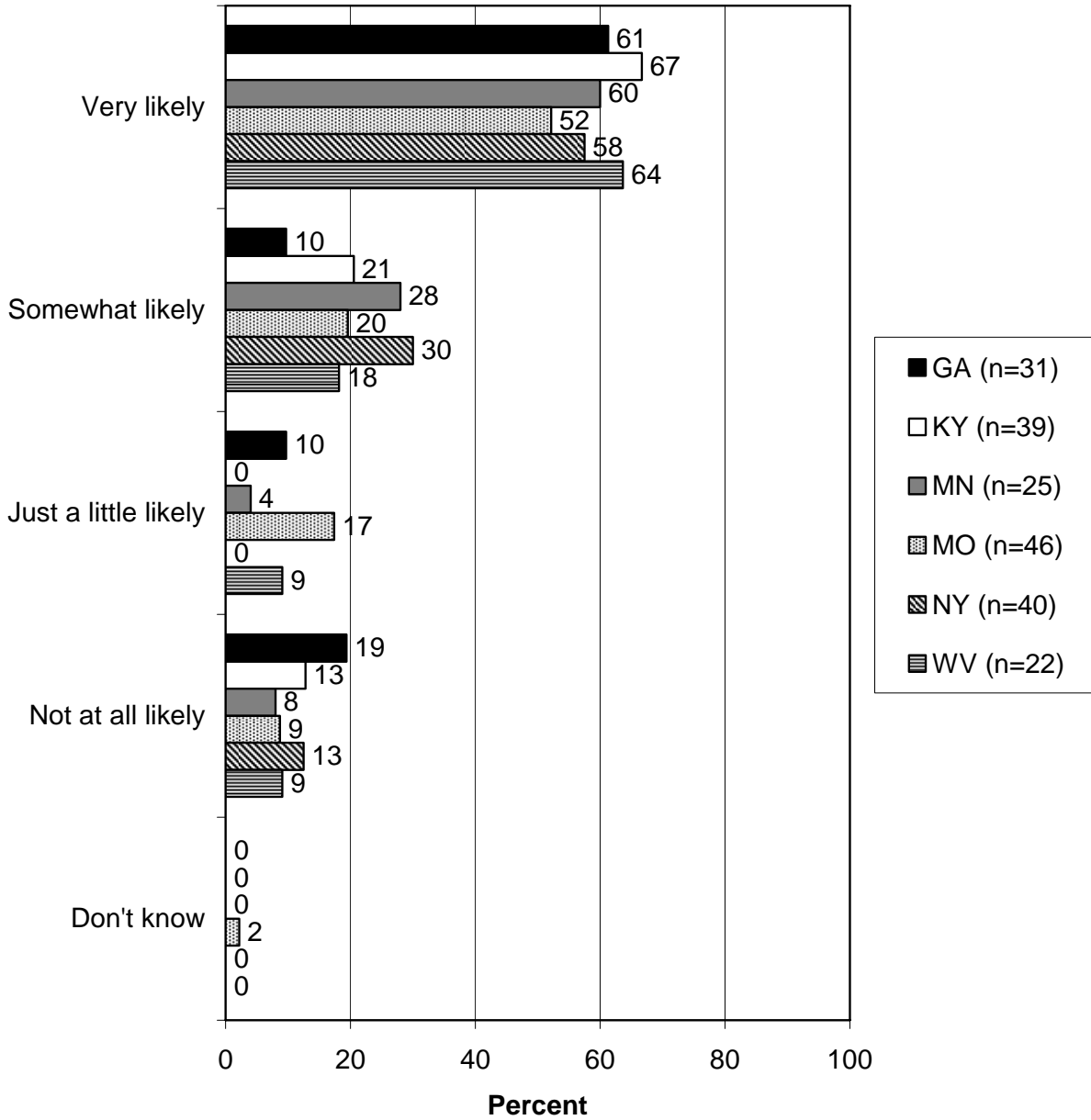
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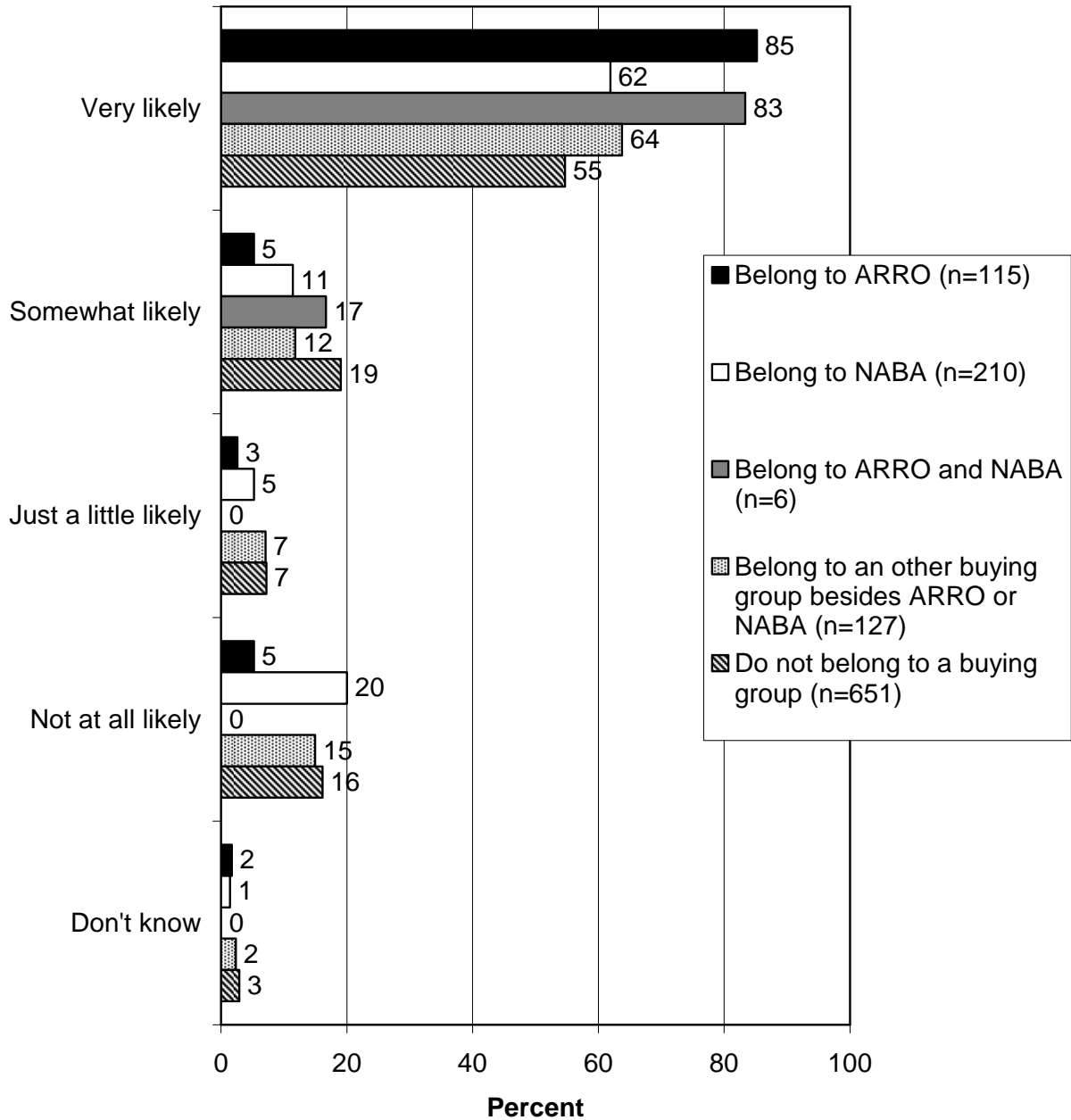
**Q55. How likely is it that your store/business will send someone to the 2012 ATA Trade Show in Columbus?
(Top 6 of 12 states with a large number of stores)**



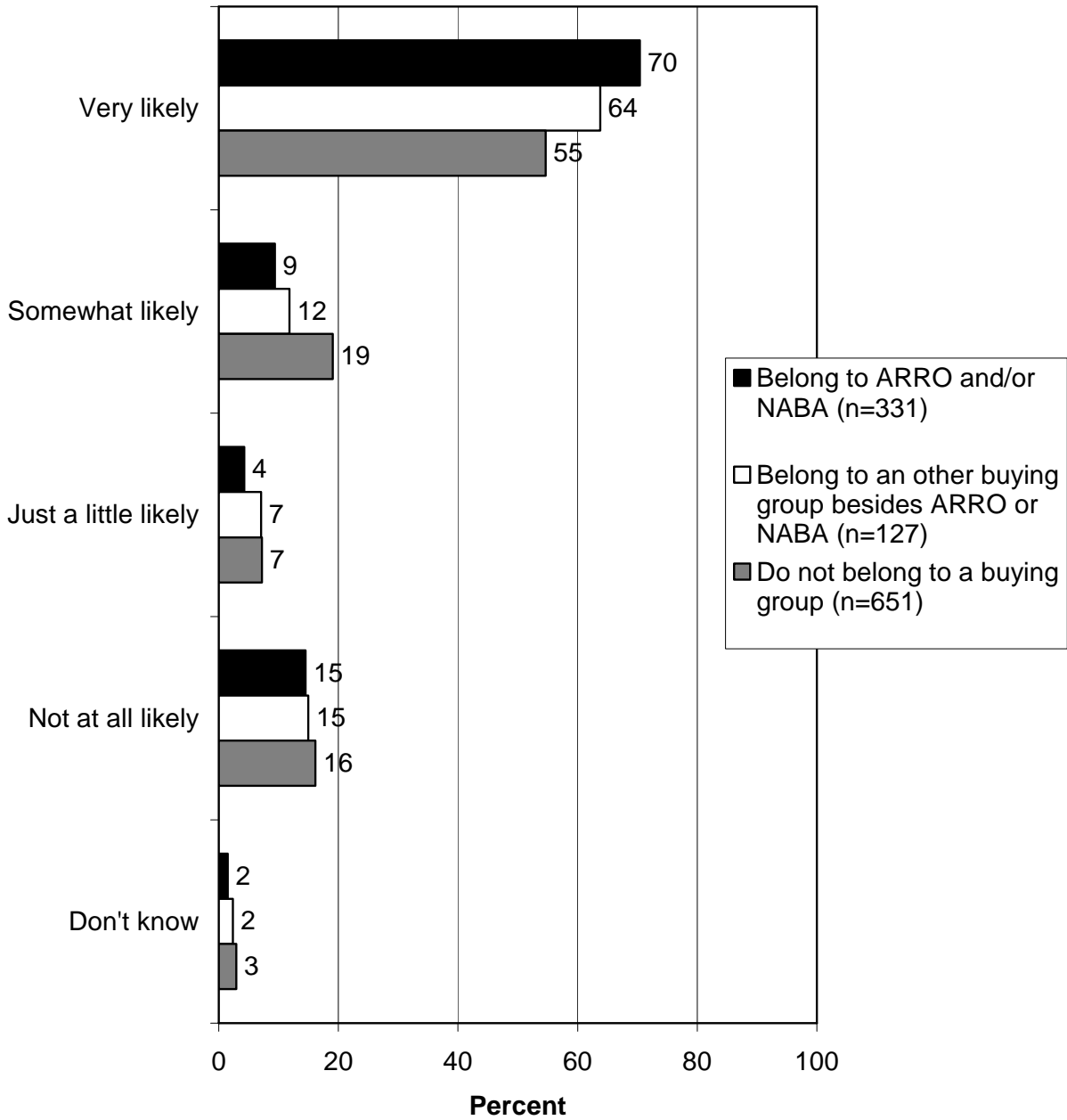
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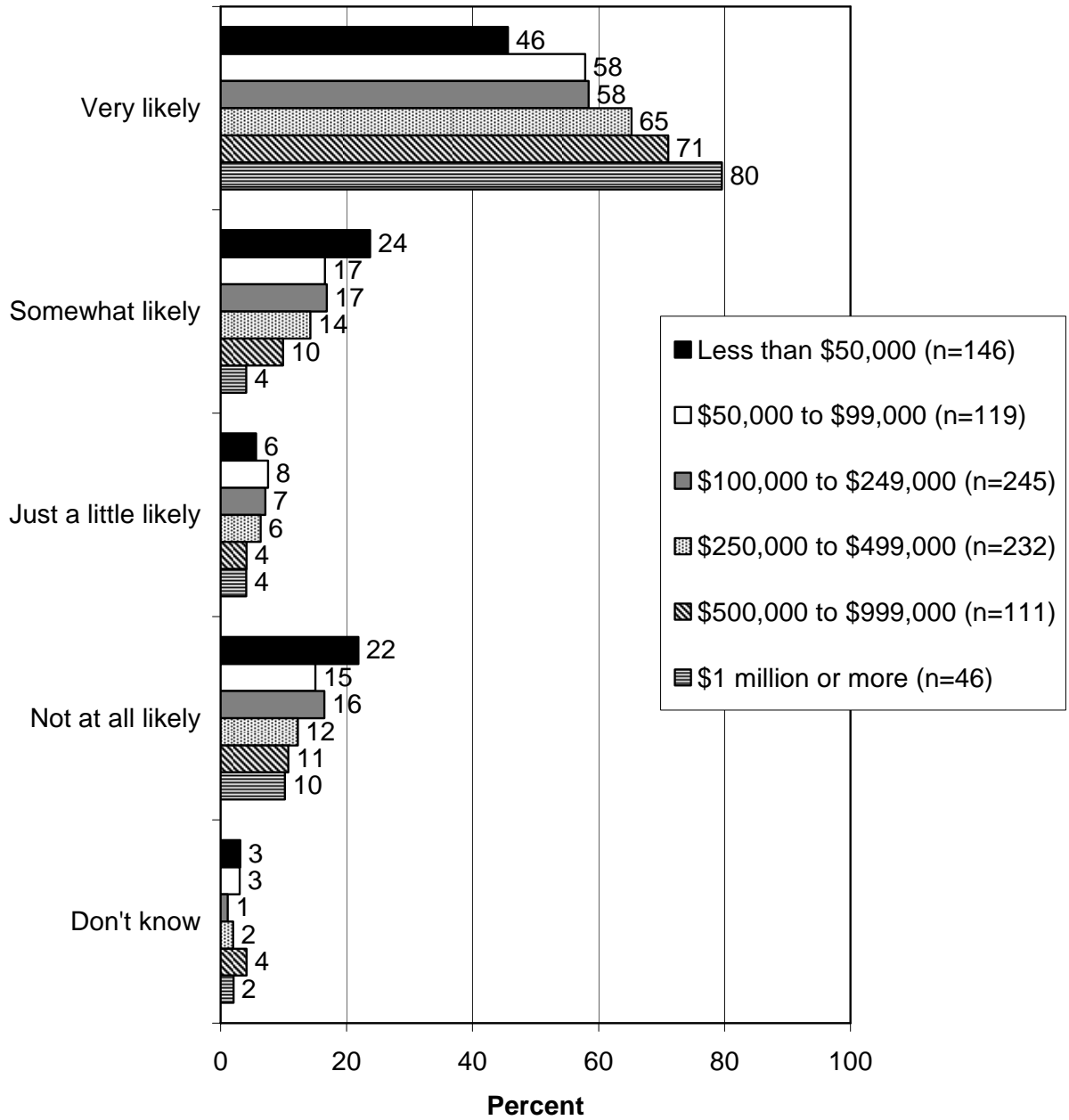
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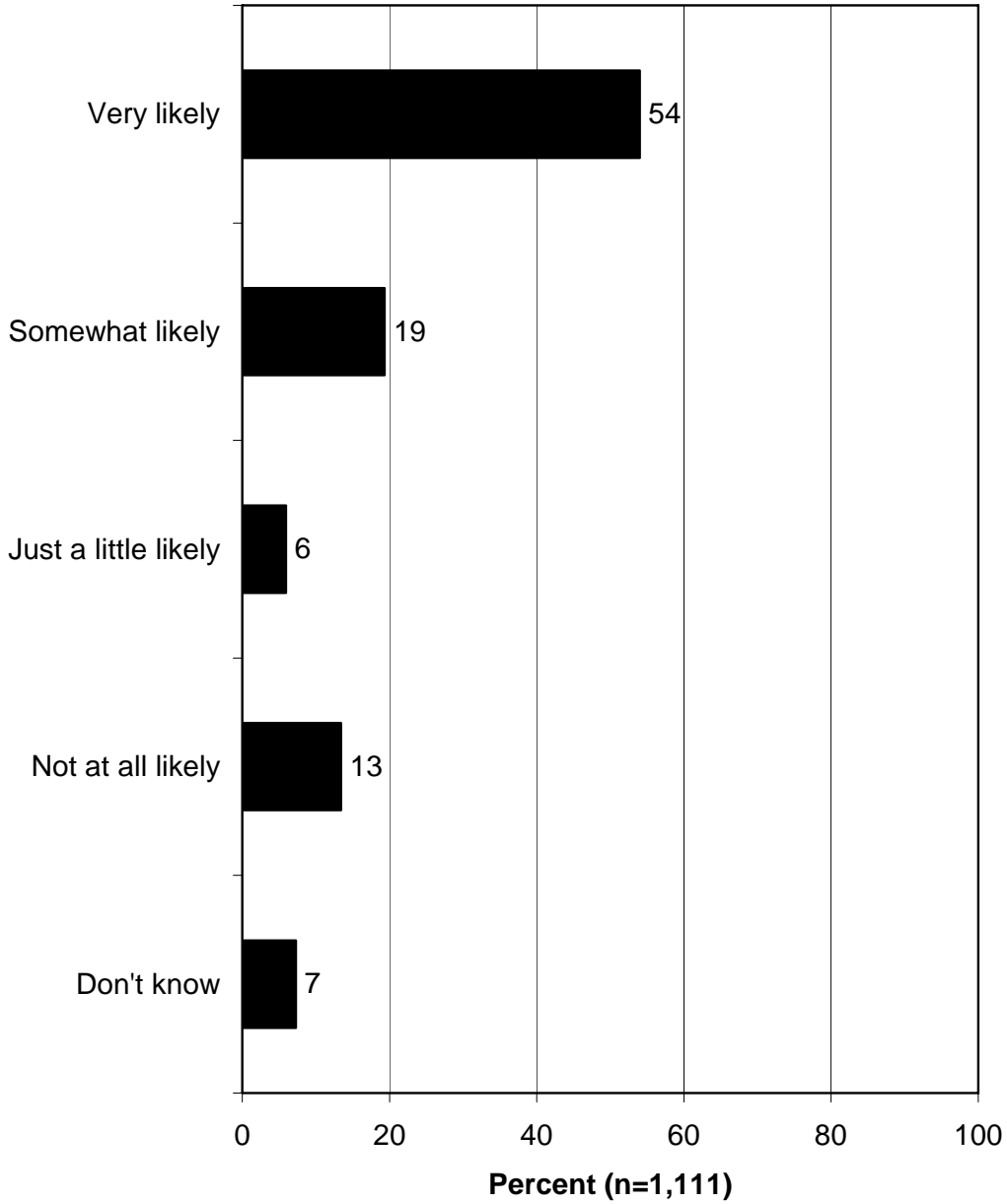
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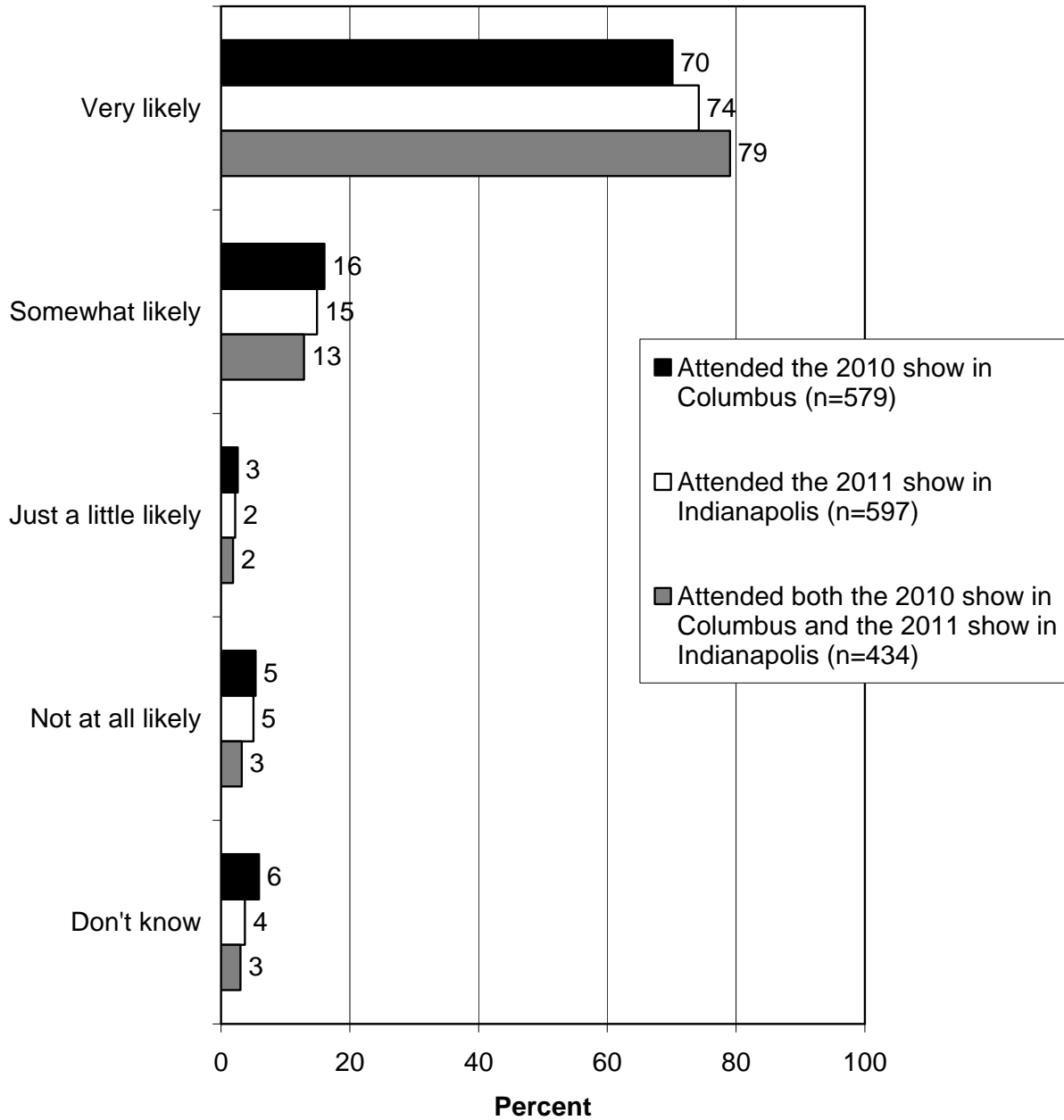
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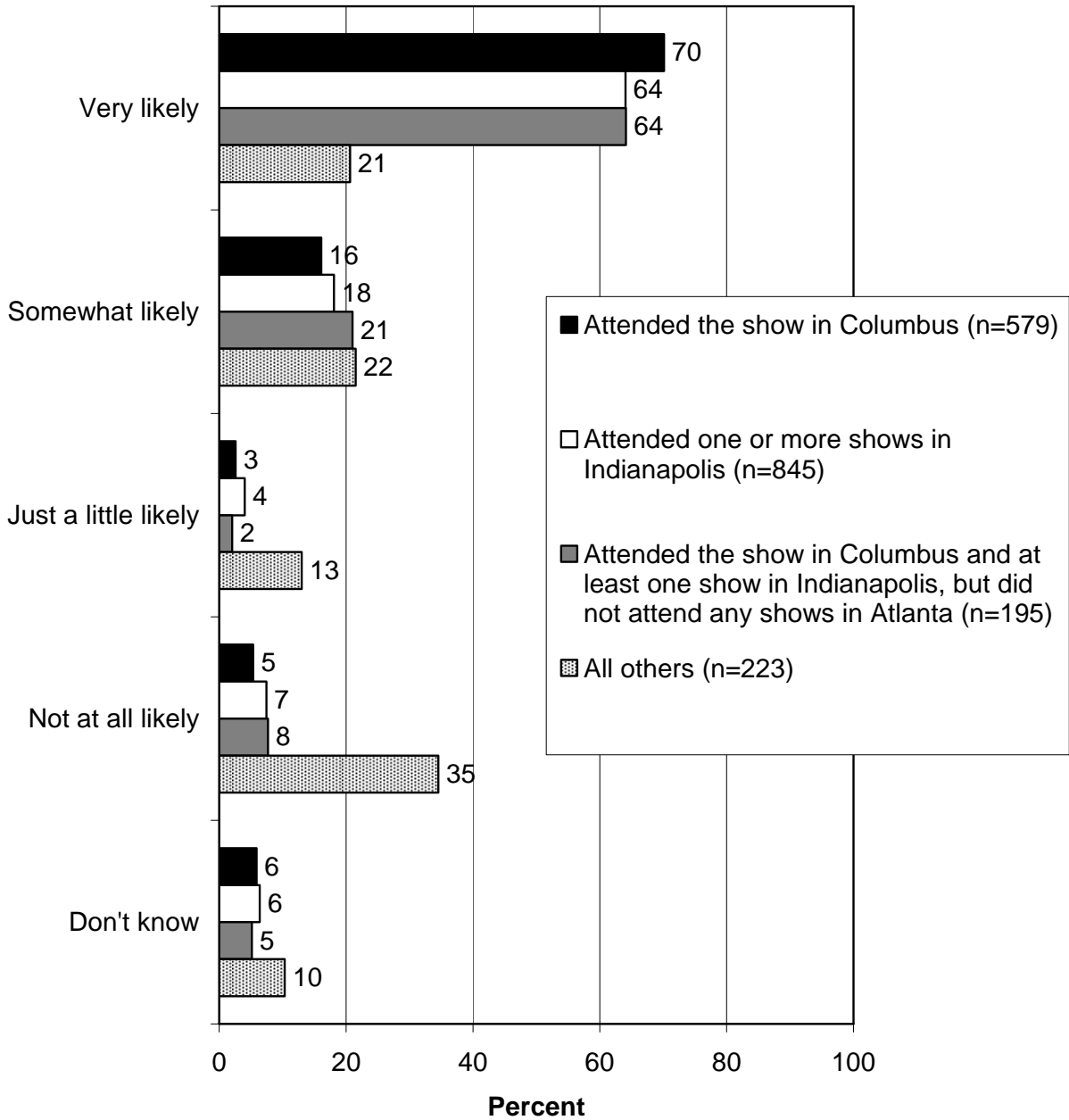
Q56. How likely is it that your store/business will send someone to the 2013 Show in Louisville?



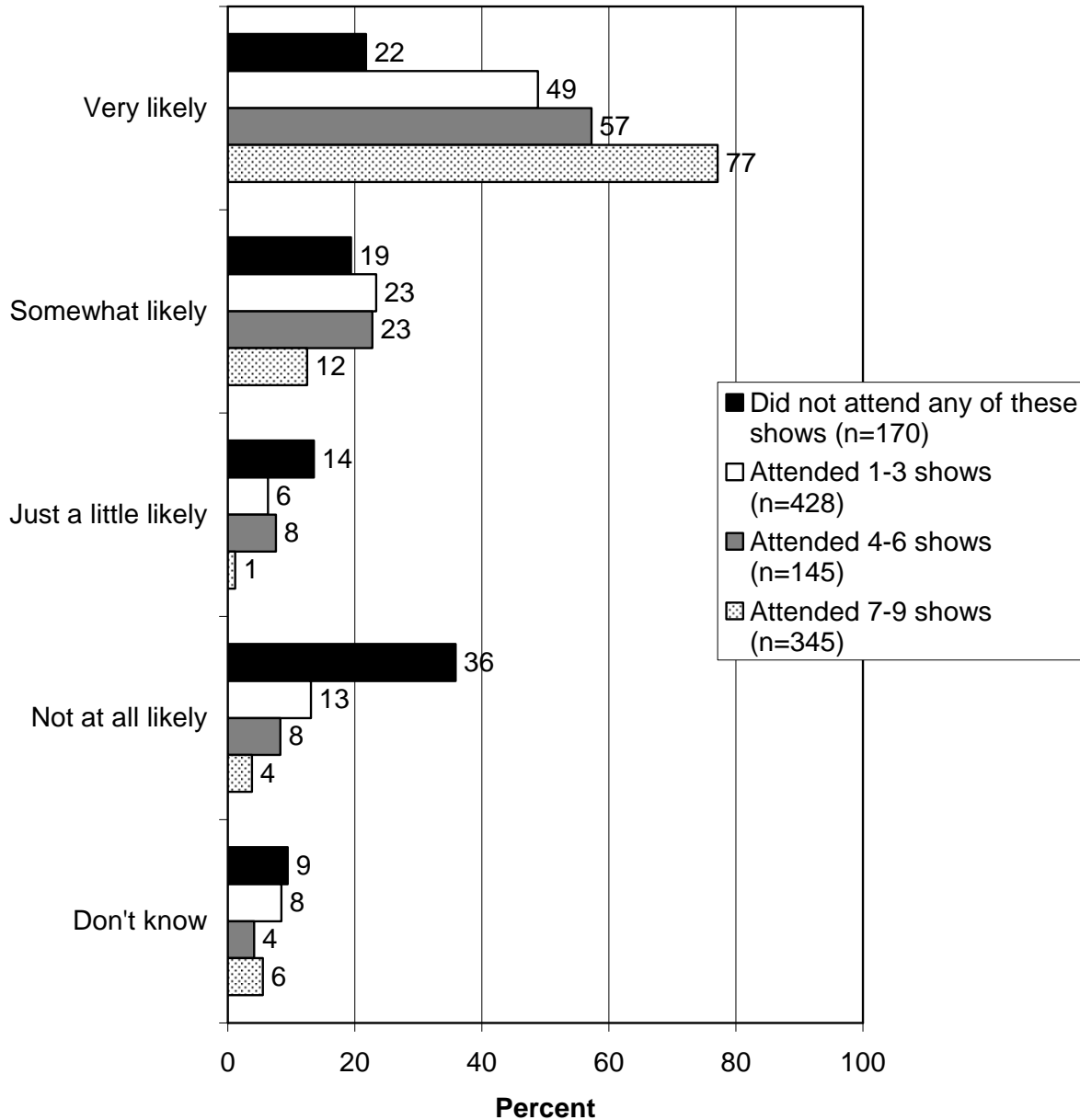
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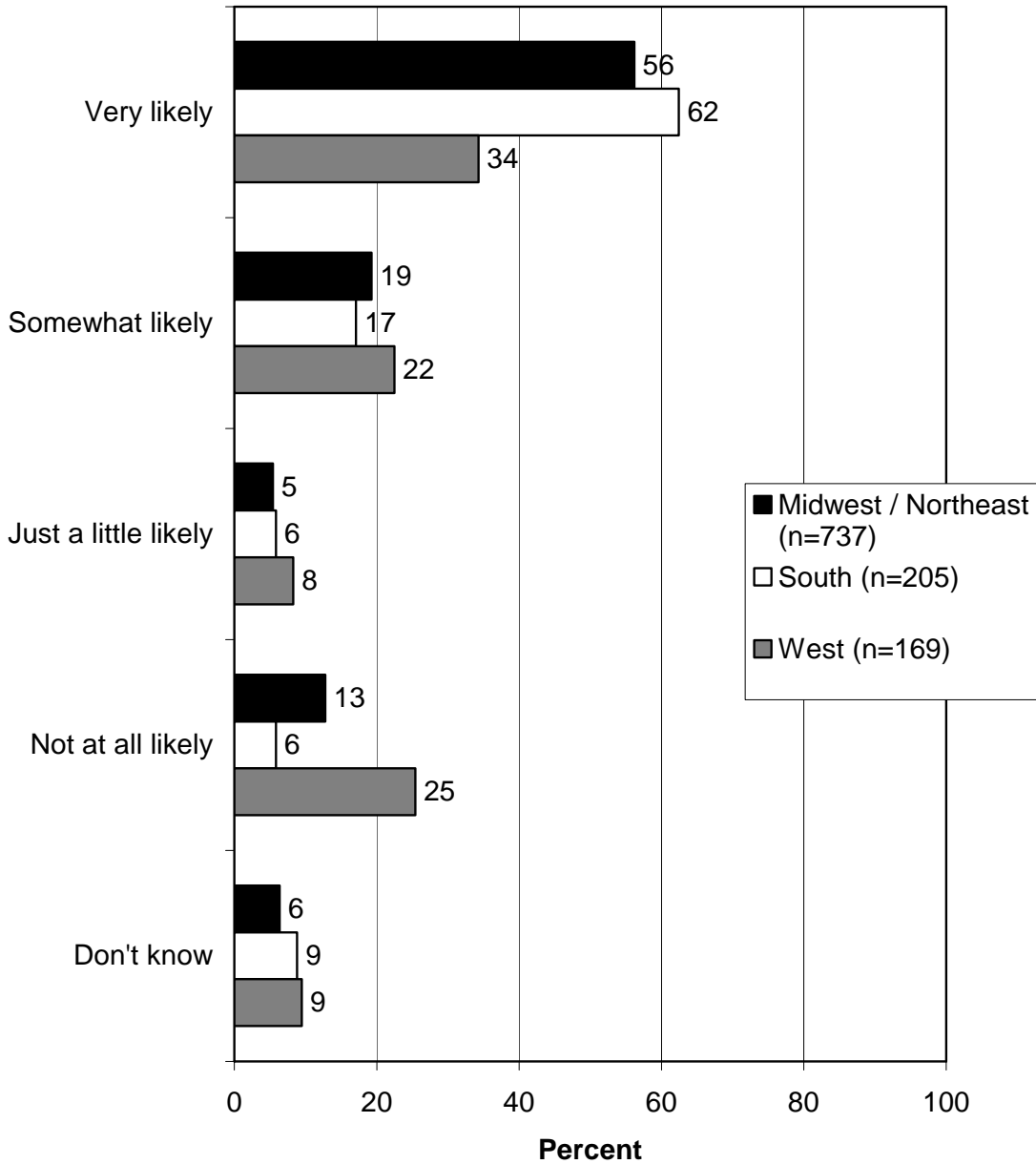
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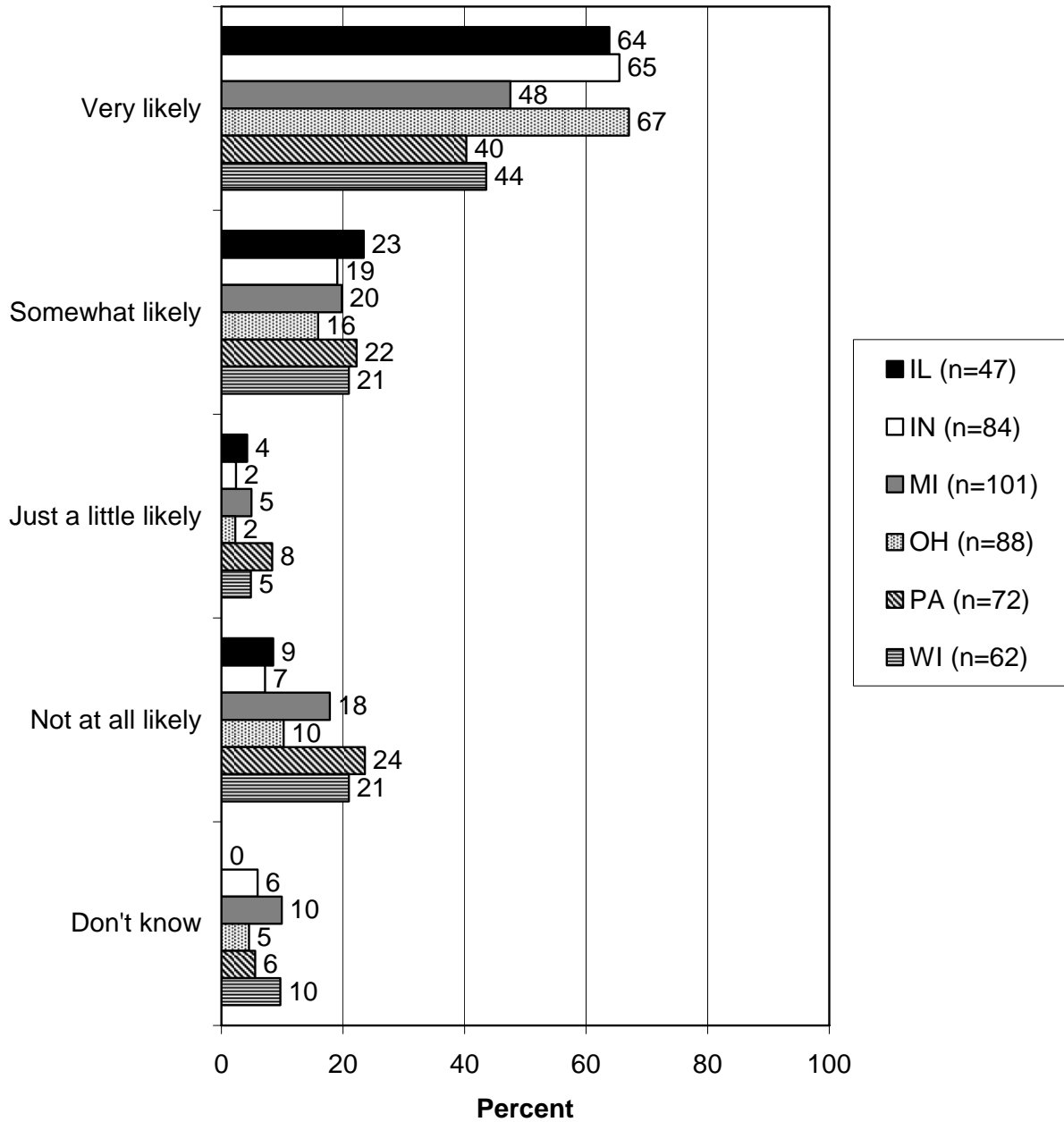
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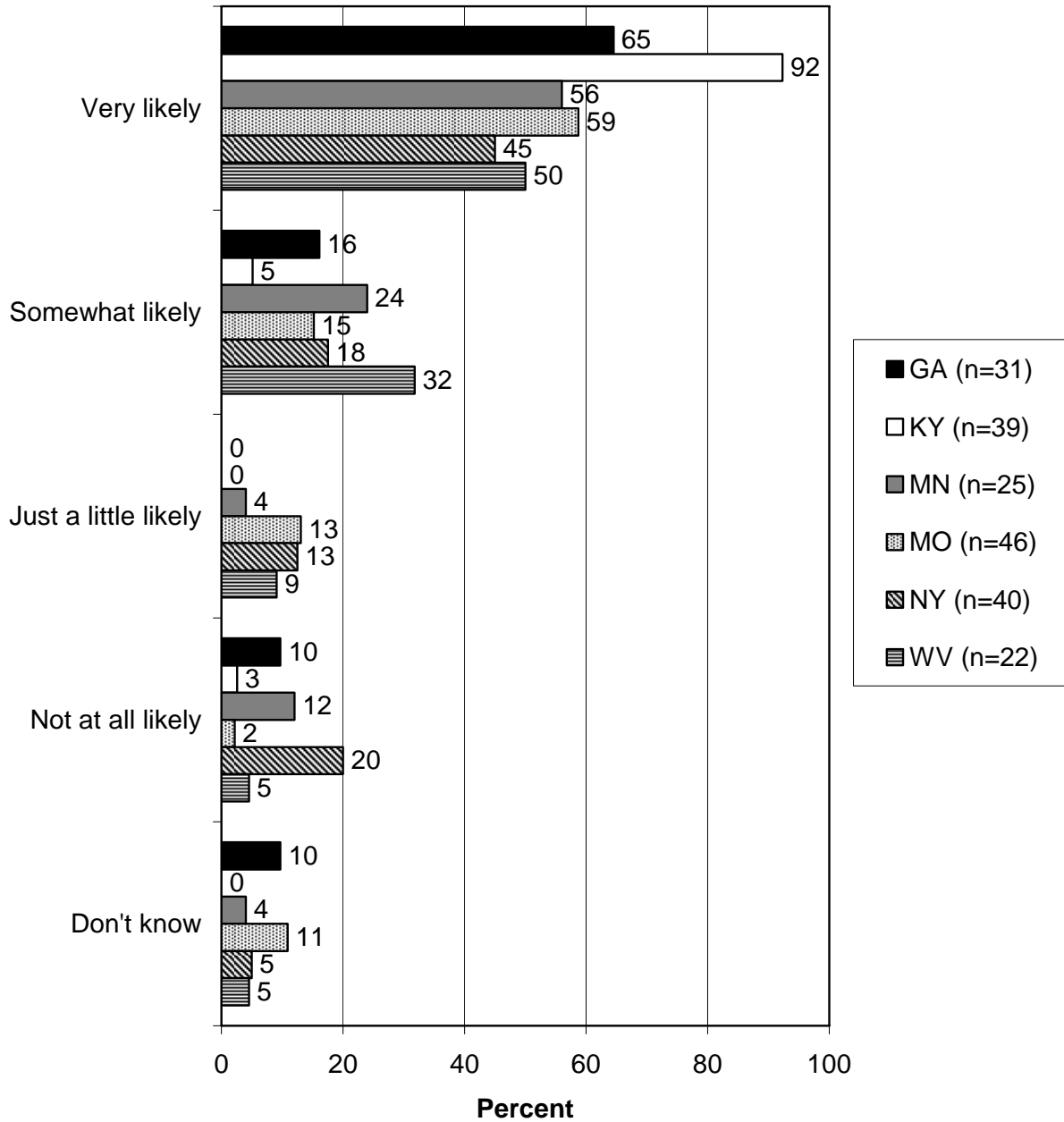
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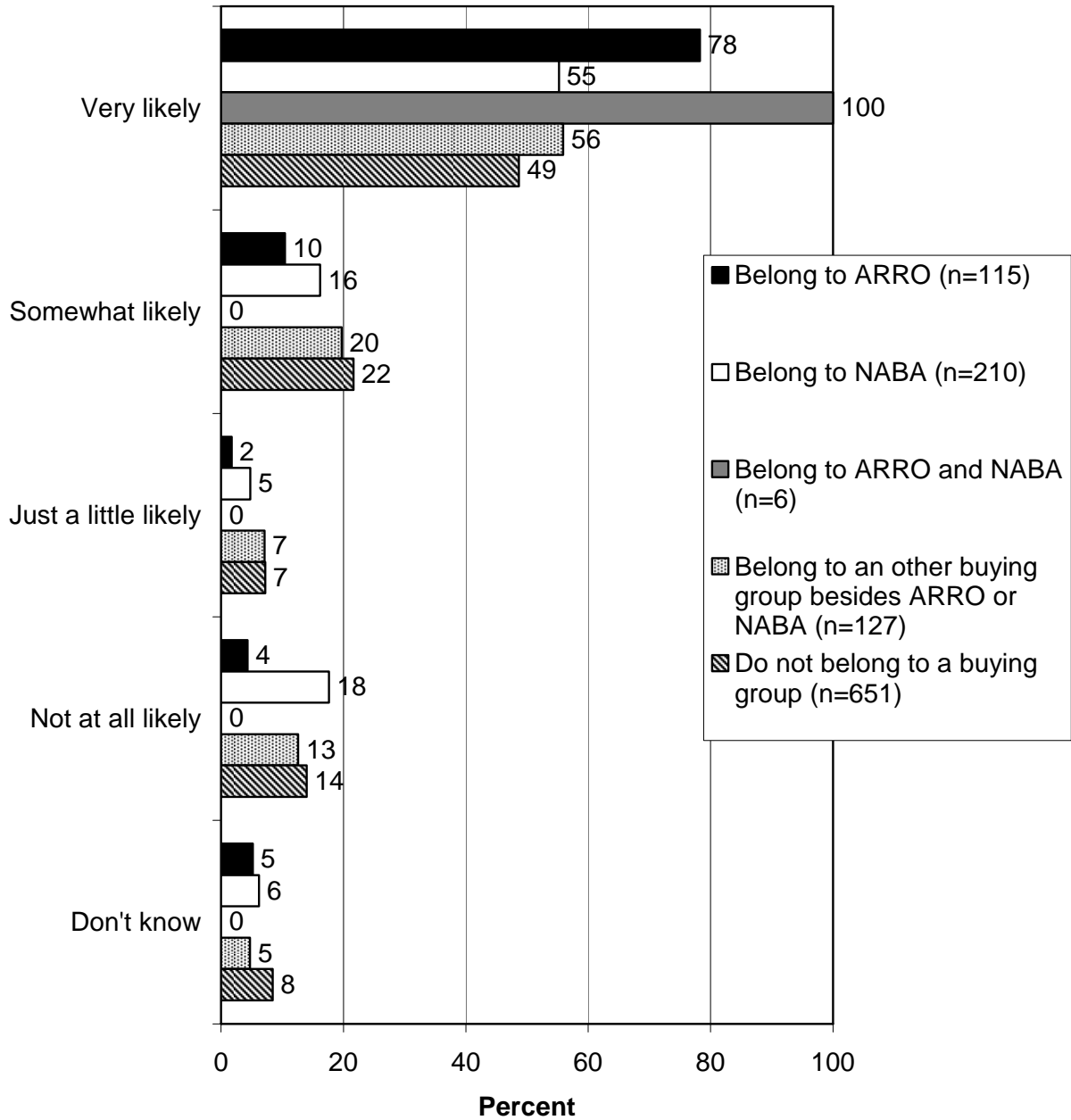
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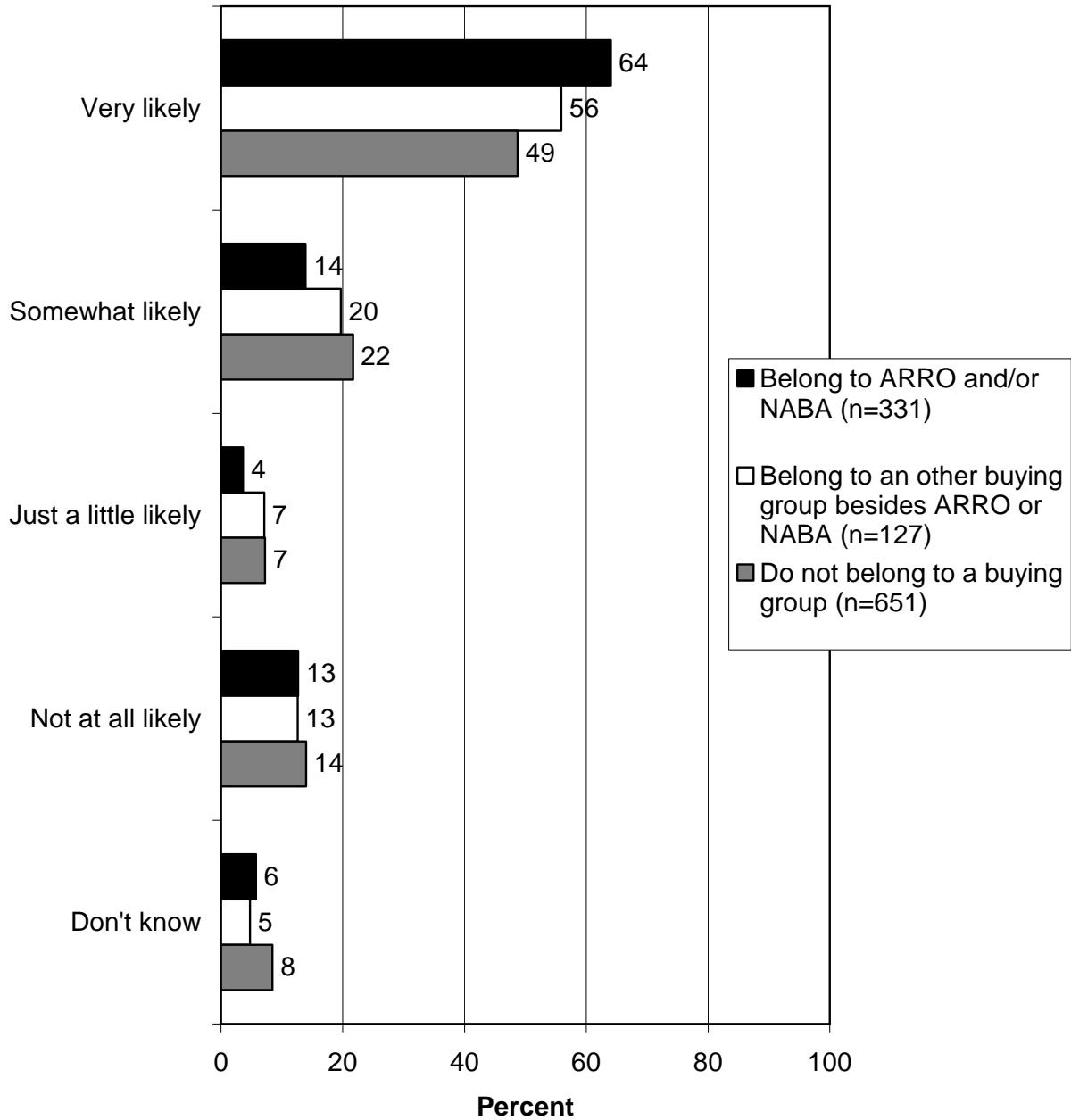
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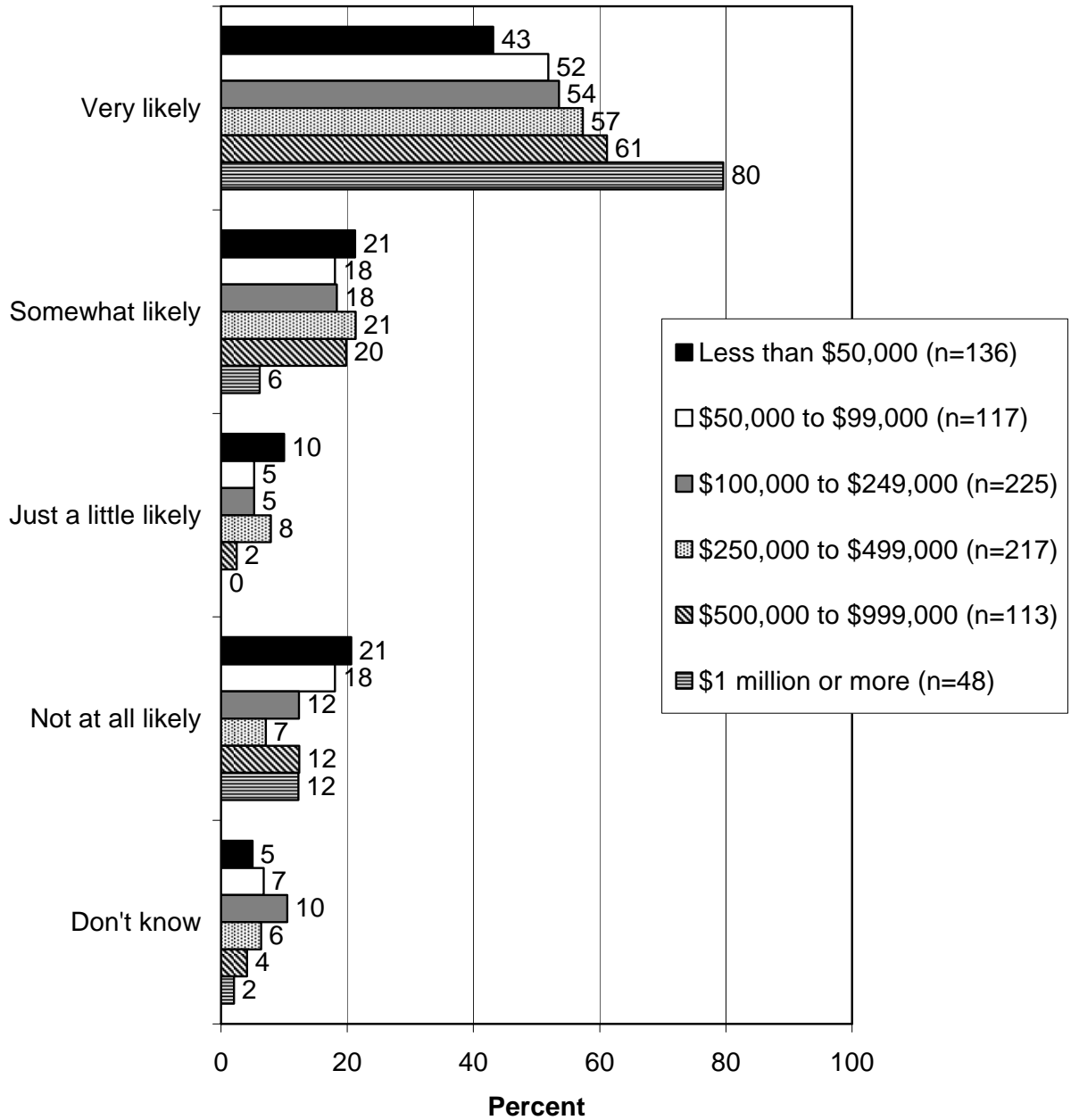
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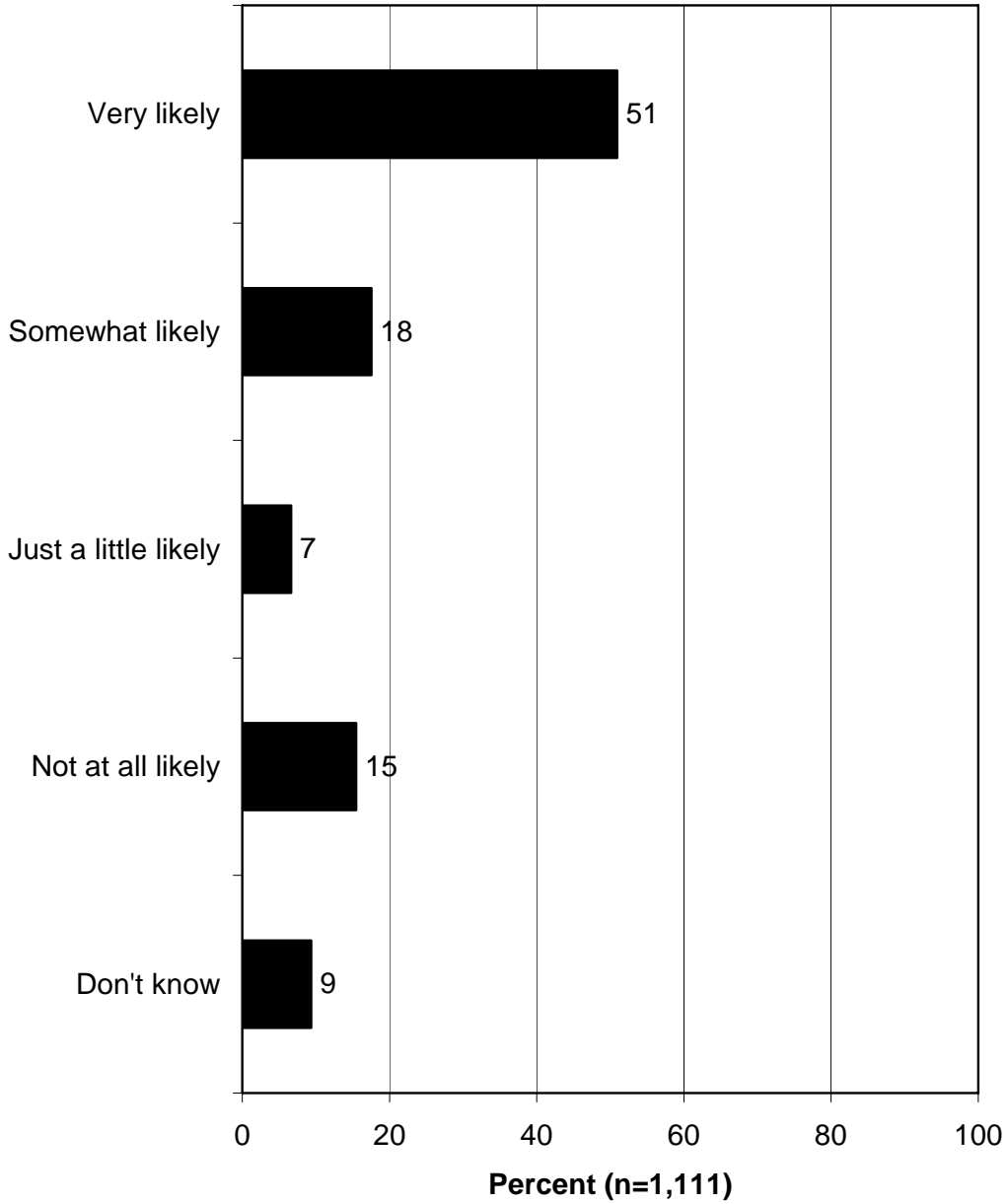
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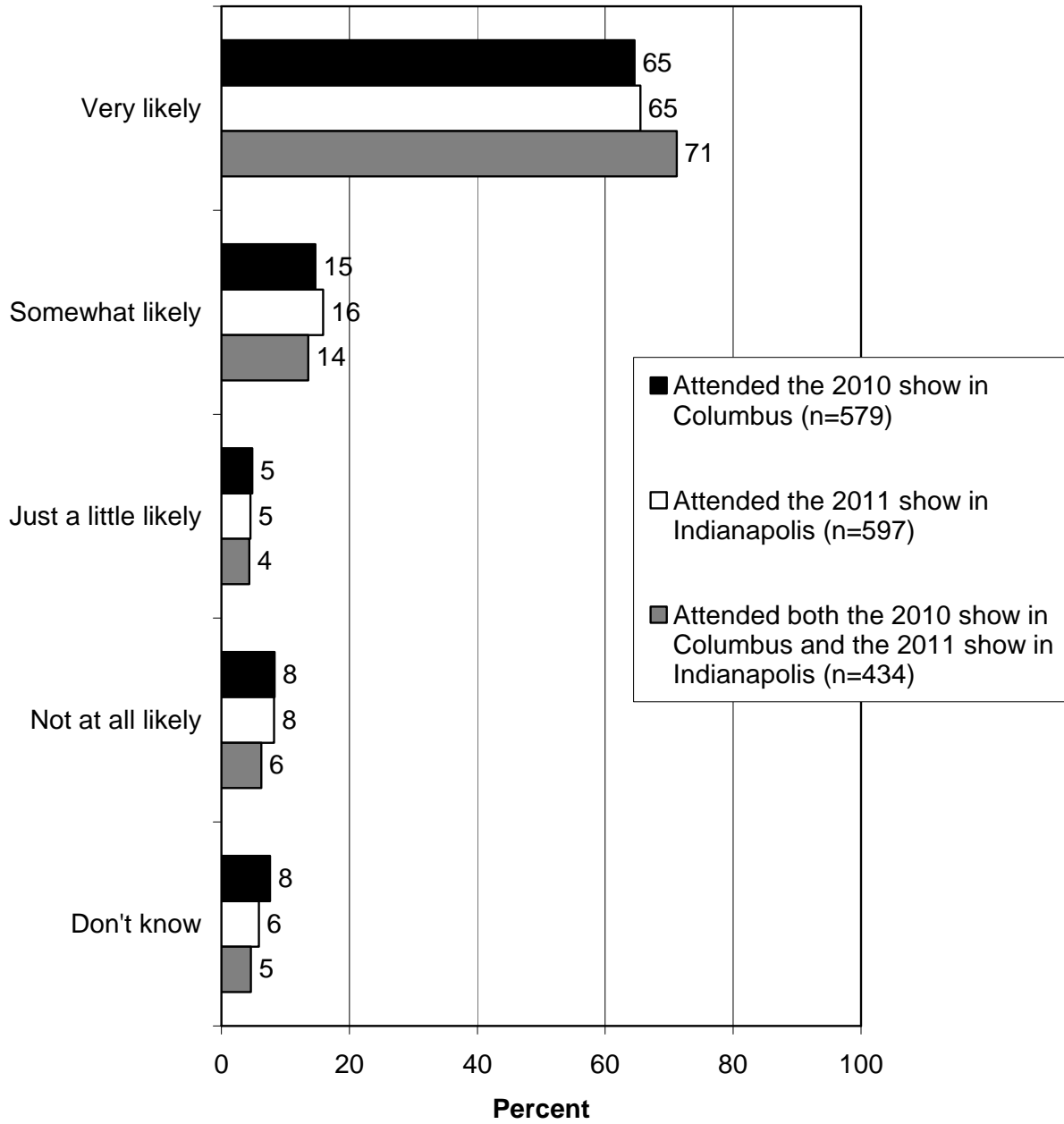
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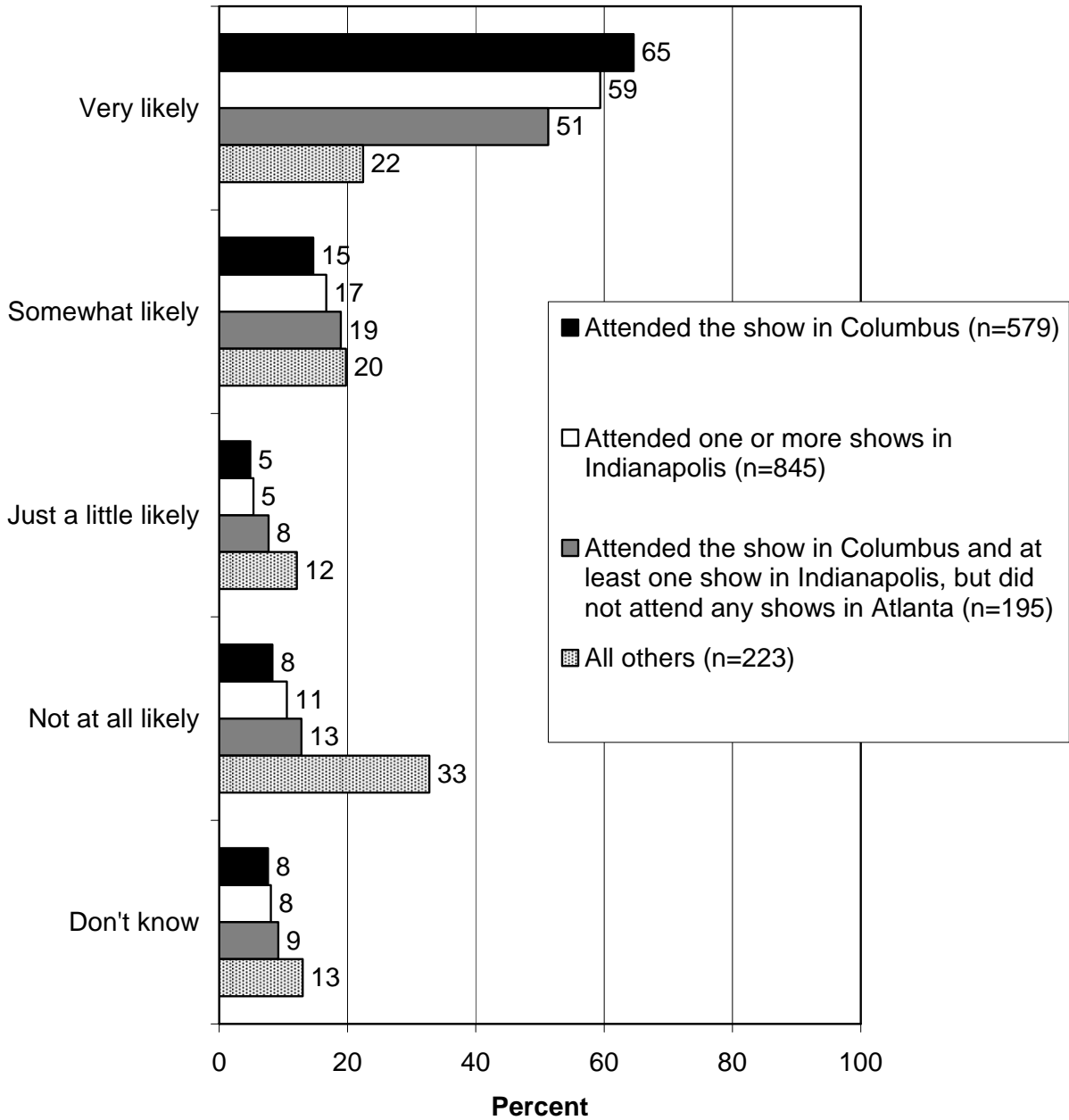
Q57. How likely is it that your store/business will send someone to the 2014 show in Nashville?



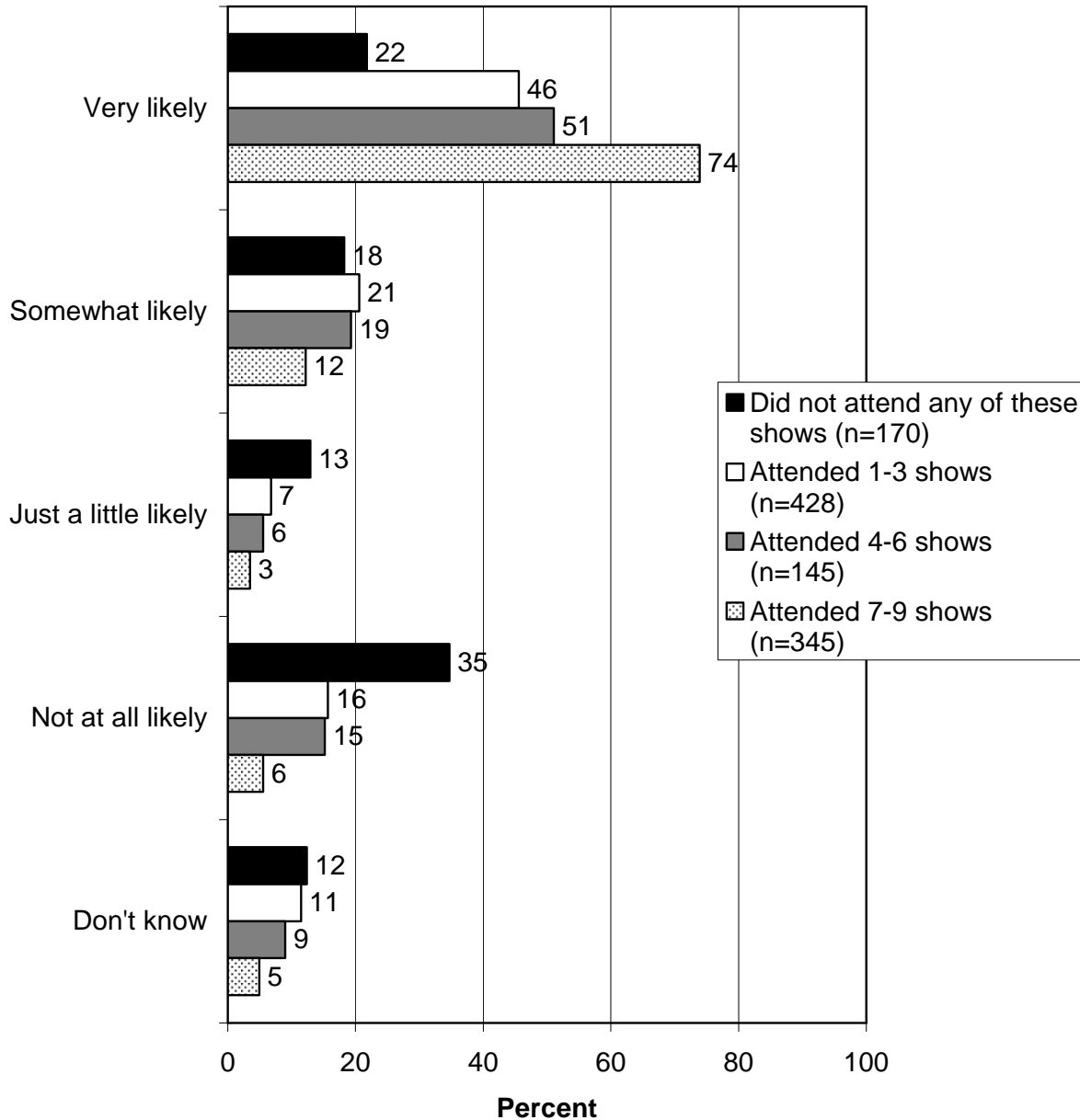
Q57. How likely is it that your store/business will send someone to the 2014 show in Nashville?



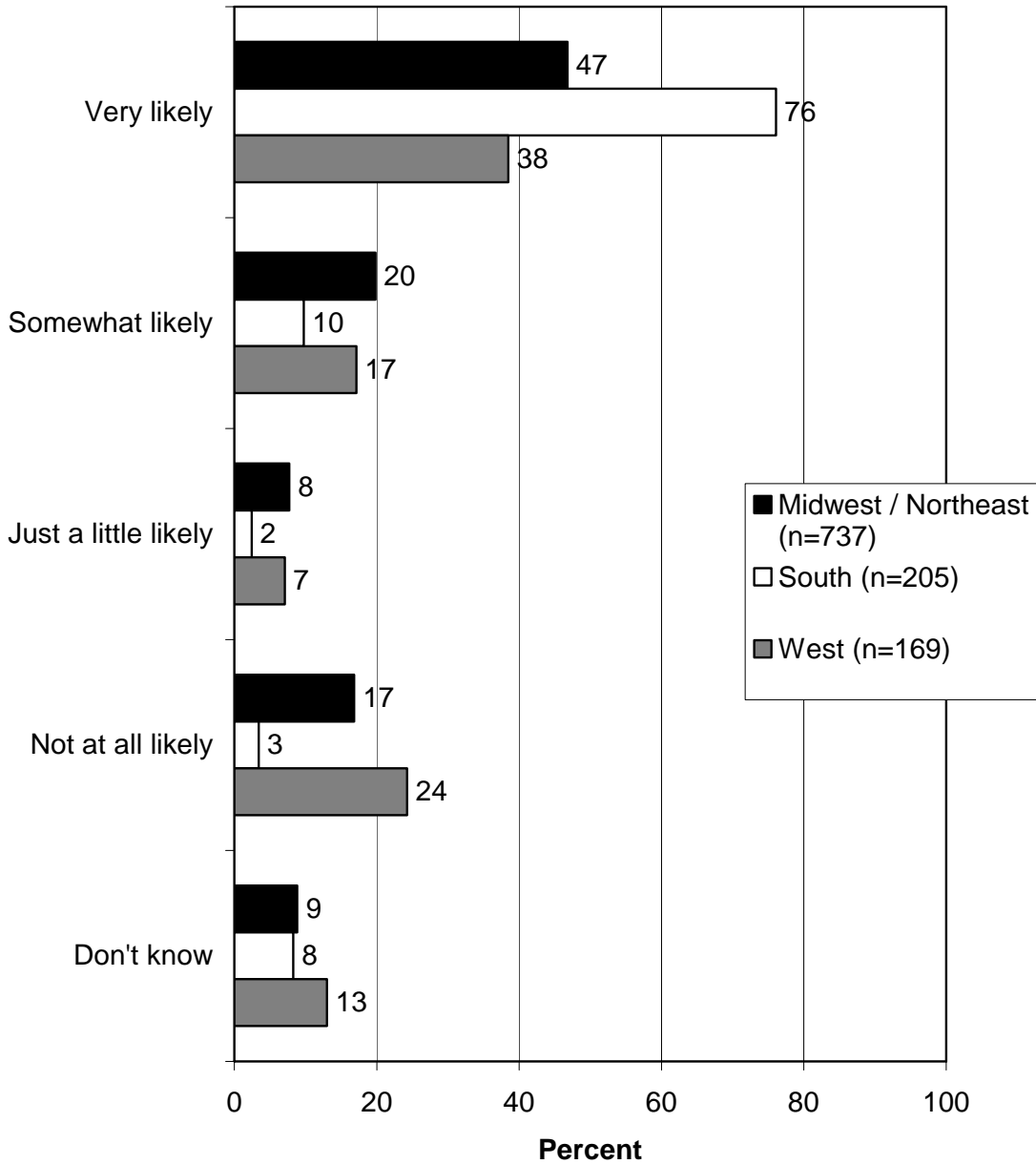
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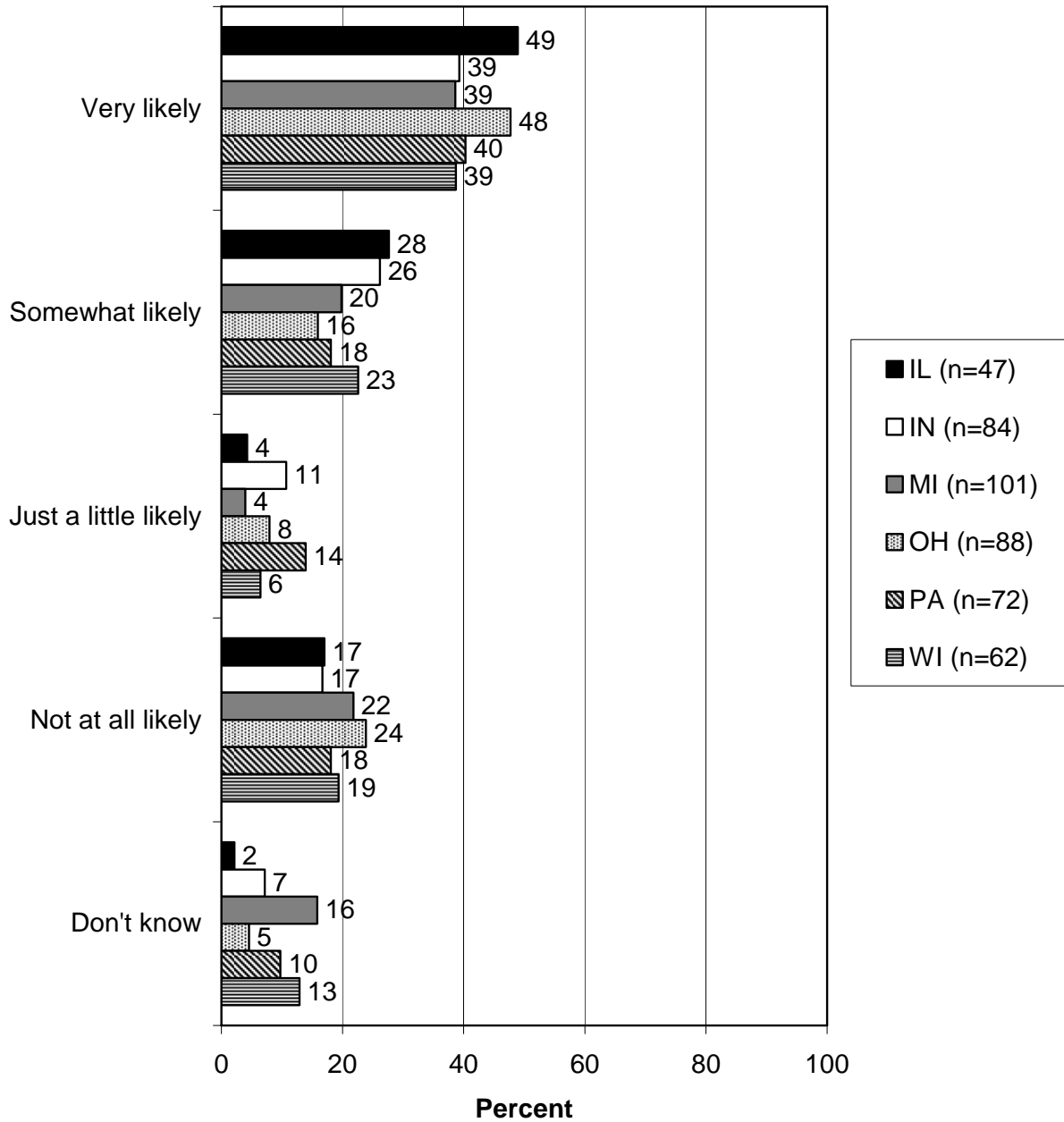
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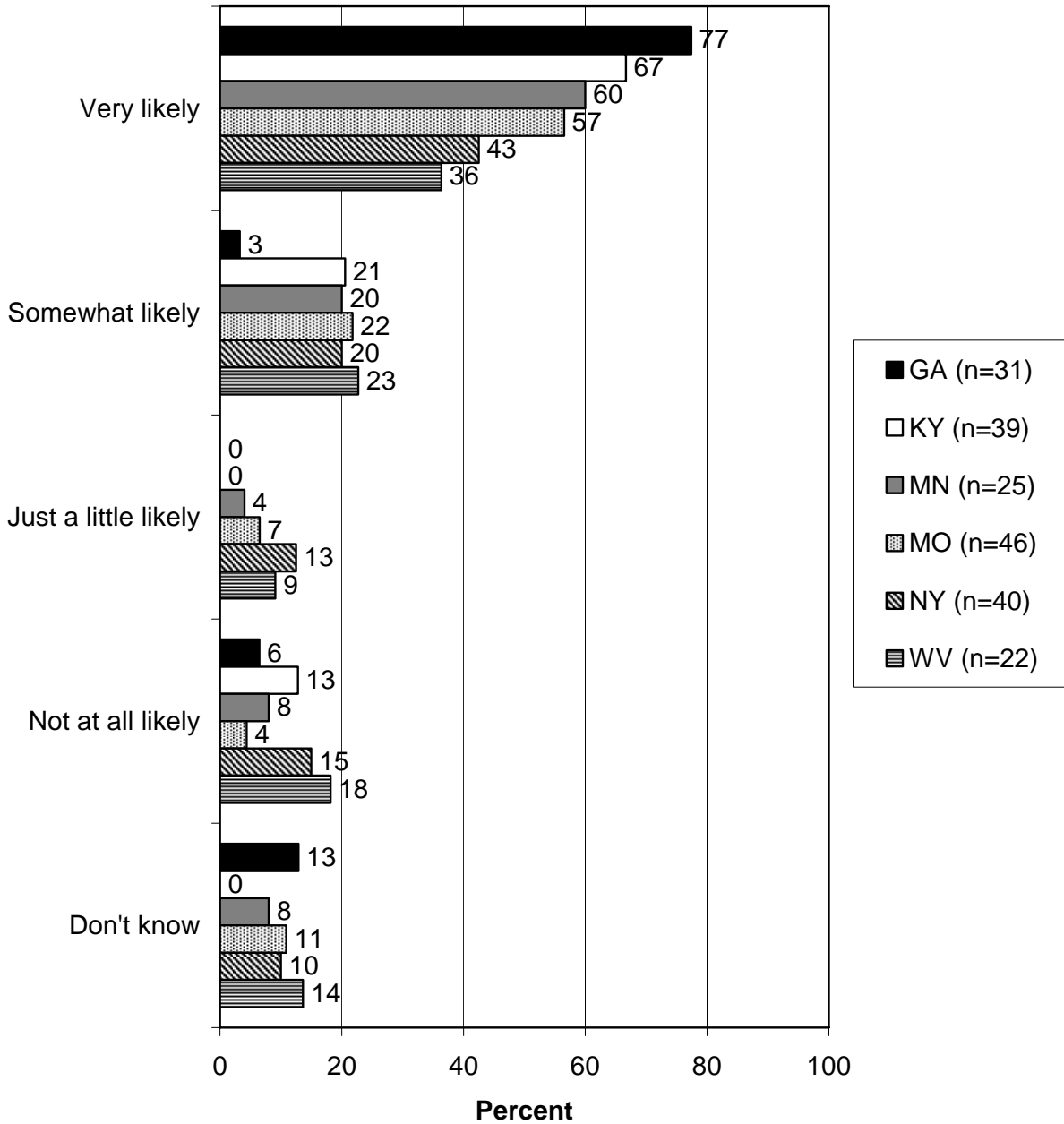
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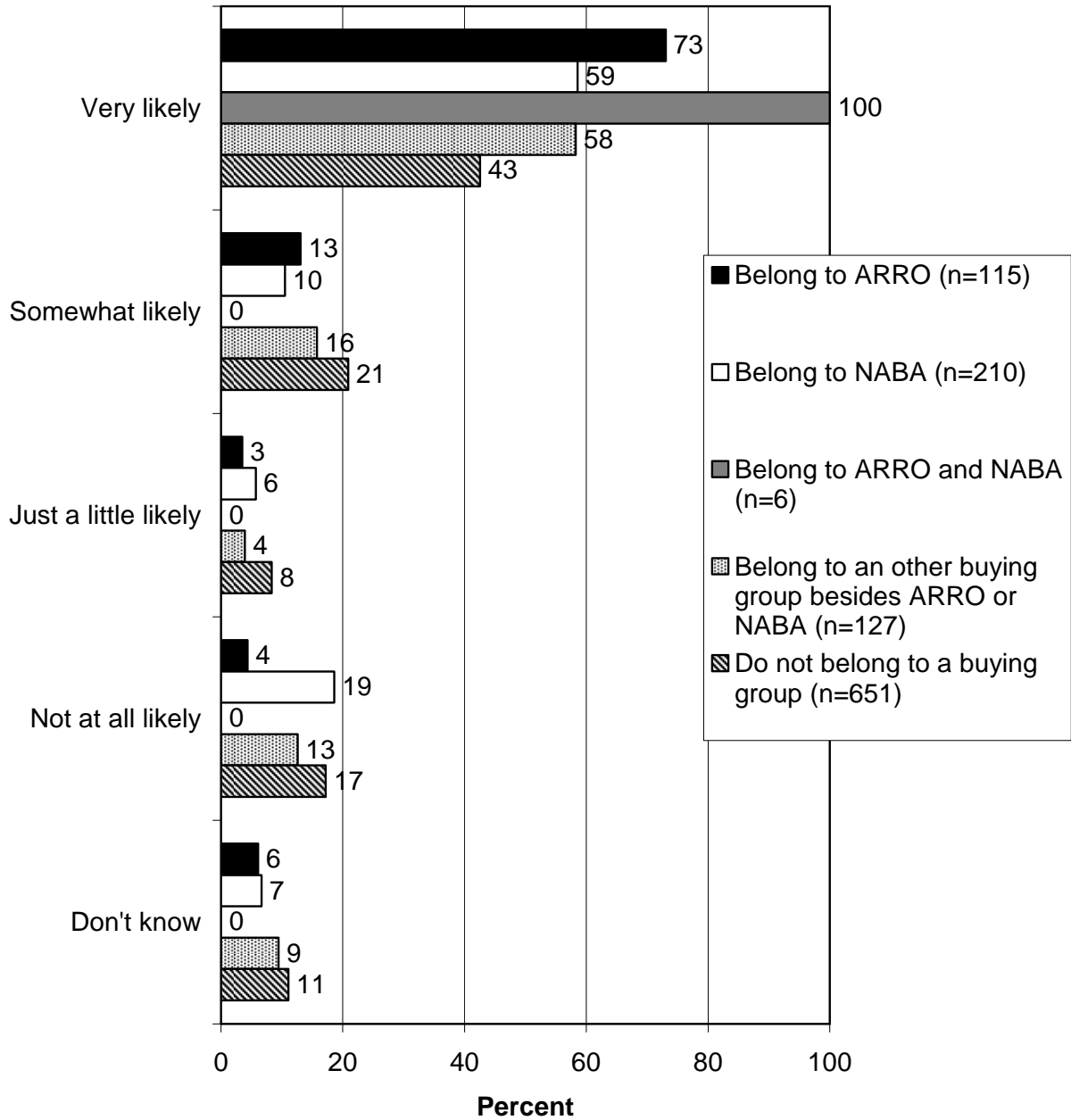
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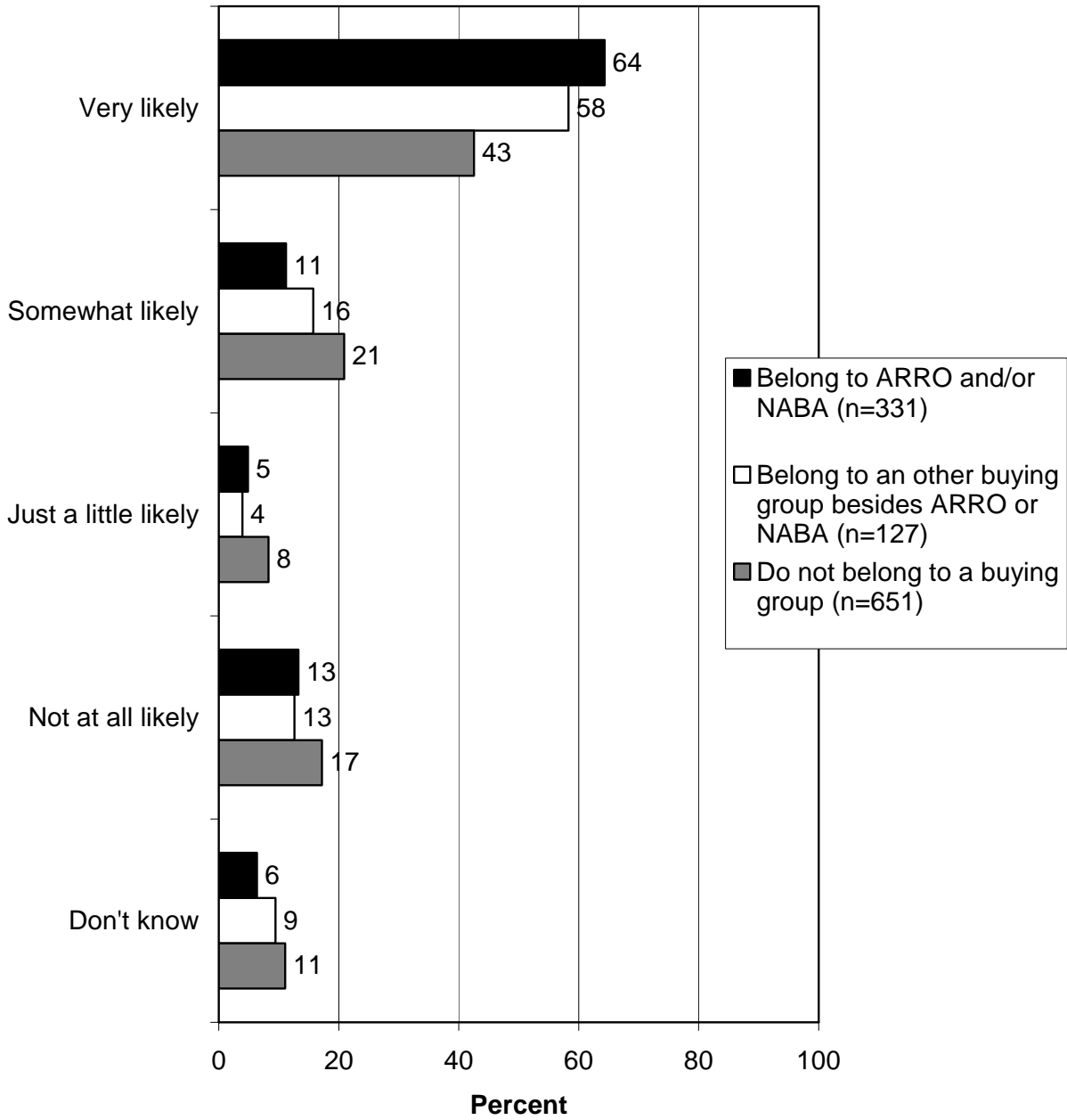
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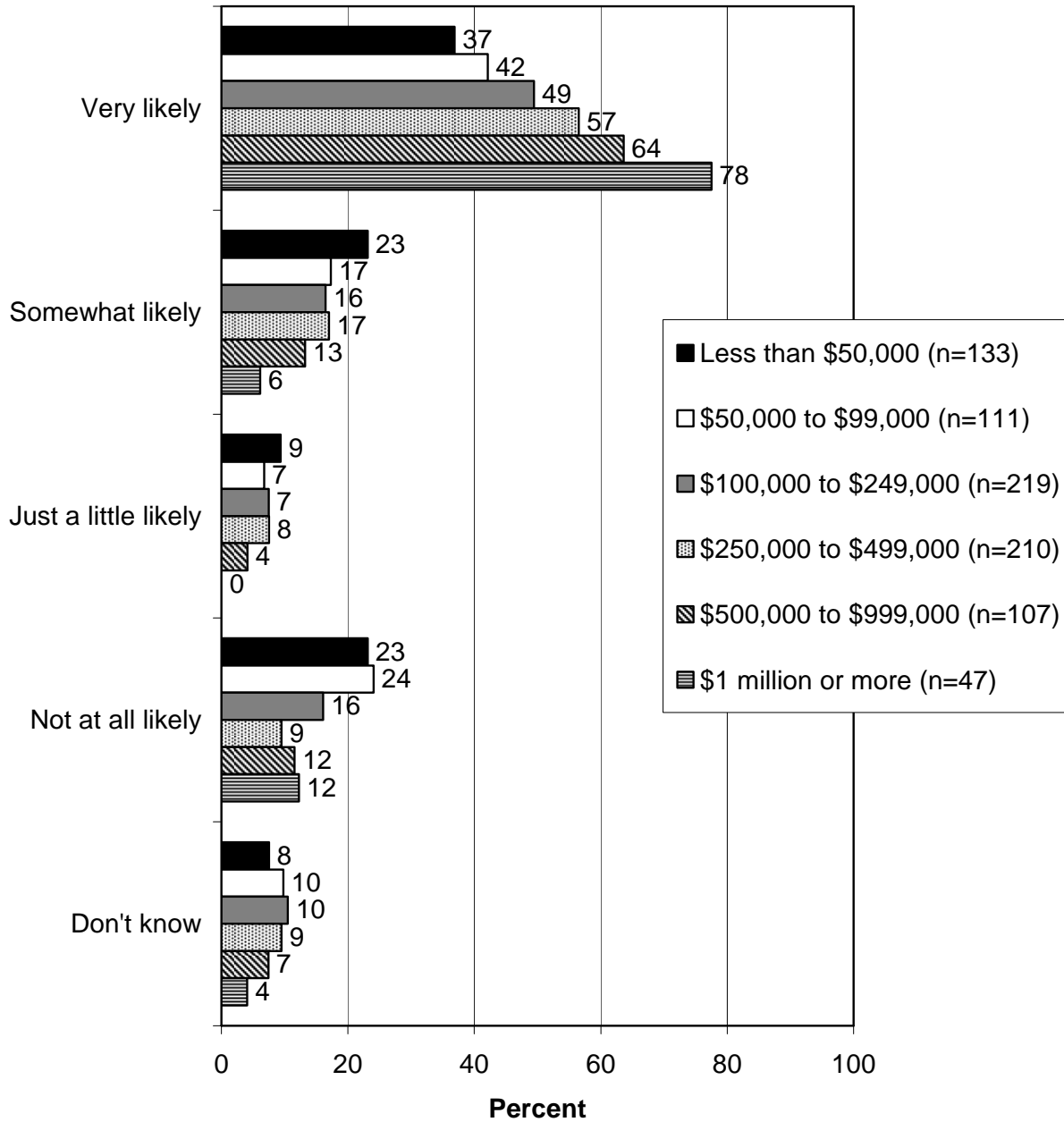
Q57. How likely is it that your store/business will send someone to the show in Nashville?



Q57. How likely is it that your store/business will send someone to the 2014 show in Nashville?



Q57. How likely is it that your store/business will send someone to the 2014 ATA Trade Show in Nashville?



ABOUT RESPONSIVE MANAGEMENT

Responsive Management is a nationally recognized public opinion and attitude survey research firm specializing in natural resource and outdoor recreation issues. Its mission is to help natural resource and outdoor recreation agencies and organizations better understand and work with their constituents, customers, and the public.

Utilizing its in-house, full-service, computer-assisted telephone and mail survey center with 45 professional interviewers, Responsive Management has conducted more than 1,000 telephone surveys, mail surveys, personal interviews, and focus groups, as well as numerous marketing and communications plans, need assessments, and program evaluations on natural resource and outdoor recreation issues.

Clients include most of the federal and state natural resource, outdoor recreation, and environmental agencies, and most of the top conservation organizations. Responsive Management also collects attitude and opinion data for many of the nation's top universities, including the University of Southern California, Virginia Tech, Colorado State University, Auburn, Texas Tech, the University of California—Davis, Michigan State University, the University of Florida, North Carolina State University, Penn State, West Virginia University, and others.

Among the wide range of work Responsive Management has completed during the past 20 years are studies on how the general population values natural resources and outdoor recreation, and their opinions on and attitudes toward an array of natural resource-related issues. Responsive Management has conducted dozens of studies of selected groups of outdoor recreationists, including anglers, boaters, hunters, wildlife watchers, birdwatchers, park visitors, historic site visitors, hikers, and campers, as well as selected groups within the general population, such as landowners, farmers, urban and rural residents, women, senior citizens, children, Hispanics, Asians, and African-Americans. Responsive Management has conducted studies on environmental education, endangered species, waterfowl, wetlands, water quality, and the reintroduction of numerous species such as wolves, grizzly bears, the California condor, and the Florida panther.

Responsive Management has conducted research on numerous natural resource ballot initiatives and referenda and helped agencies and organizations find alternative funding and increase their memberships and donations. Responsive Management has conducted major agency and organizational program needs assessments and helped develop more effective programs based upon a solid foundation of fact. Responsive Management has developed websites for natural resource organizations, conducted training workshops on the human dimensions of natural resources, and presented numerous studies each year in presentations and as keynote speakers at major natural resource, outdoor recreation, conservation, and environmental conferences and meetings.

Responsive Management has conducted research on public attitudes toward natural resources and outdoor recreation in almost every state in the United States, as well as in Canada, Australia, the United Kingdom, France, Germany, and Japan. Responsive Management routinely conducts surveys in Spanish and has also conducted surveys and focus groups in Chinese, Korean, Japanese, and Vietnamese.

Responsive Management's research has been featured in most of the nation's major media, including CNN, ESPN, *The Washington Times*, *The New York Times*, *Newsweek*, *The Wall Street Journal*, and on the front pages of *The Washington Post* and *USA Today*.

Visit the Responsive Management website at:

www.responsivemanagement.com