2009 SURVEY FOR THE ARCHERY TRADE ASSOCIATION REGARDING THE TRADE SHOWS AND ARCHERY ADVERTISING

Conducted for the Archery Trade Association

by Responsive Management

2009

2009 SURVEY FOR THE ARCHERY TRADE ASSOCIATION REGARDING THE TRADE SHOWS AND ARCHERY ADVERTISING

2009

Responsive Management National Office
Mark Damian Duda, Executive Director
Martin Jones, Senior Research Associate
Tom Beppler, Research Associate
Steven J. Bissell, Ph.D., Qualitative Research Associate
Andrea Criscione, Research Associate
James B. Herrick, Ph.D., Research Associate
Joanne Nobile, Research Associate
Amanda Ritchie, Research Associate
Carol L. Schilli, Research Associate
Megan Wilkes, Research Associate
Tim Winegord, Survey Center Manager
Alison Lanier, Business Manager

130 Franklin Street
Harrisonburg, VA 22801
Phone: 540/432-1888 Fax: 540/432-1892
E-mail: mark@responsivemanagement.com
www.responsivemanagement.com

Acknowledgments

Responsive Management would like to thank Jay McAninch, Amy Hatfield, and Cindy Brophy for their input, support, and guidance on this project.

EXECUTIVE SUMMARY

INTRODUCTION AND METHODOLOGY

This study was conducted for the Archery Trade Association (ATA) to determine retailers' and exhibitors' opinions on and attitudes toward various aspects of the annual ATA Trade Show, as well as advertising issues in general. The study entailed two telephone surveys: the first of exhibitors at the ATA Trade Show, and the second of retailers/dealers (hereinafter, referred to simply as "retailers").

For the surveys, telephones were selected as the preferred sampling medium because of the universality of telephone ownership. The telephone survey questionnaires were developed cooperatively by Responsive Management and that ATA, based in part on past surveys. Responsive Management conducted pre-tests of the questionnaires to ensure proper wording, flow, and logic in the surveys. Interviews were conducted Monday through Friday from 9:00 a.m. to 3:00 p.m. and Saturday noon to 5:00 p.m., local time. The survey was conducted in March and April 2009. Responsive Management obtained a total of 351 completed interviews with retailers/dealers and 204 completed interviews with exhibitors (a total of 555 completed interviews in the two surveys). The software used for data collection was Questionnaire Programming Language (QPL).

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

ATTENDANCE AT THE ATA TRADE SHOWS, INCLUDING LIKELIHOOD TO ATTEND THE 2010 TRADE SHOW

- The surveys asked about years retailers attended the Trade Shows and exhibitors exhibited at the Trade Shows.
    - The years that retailers' companies had attended the ATA Trade Shows since 2003 is shown. In 2009, 56% of retailers' companies that were surveyed had attended the Trade Show.

- Among exhibitors who were surveyed, the percentage whose company had exhibited at the various Trade Shows ranged from 51% in the 2003 Trade Show to 99% in the 2009 Trade Show.

➢ Both surveys asked about travel distances to the 2009 Trade Show.

- Distances that retailers traveled to attend the 2009 ATA Trade Show varied widely. The median distance was 400 miles.
  - Nearly three-fourths of those retailers who attended the 2009 ATA Trade Show (72%) drove to the show; meanwhile, 28% flew.
- Exhibitors also traveled widely varying distances. Their median distance was 700 miles.

➢ Likelihood to attend/exhibit at the 2010 Trade Show was examined.

- A majority of retailers surveyed indicated that it is *very* likely (58%) that they/their company will attend the 2010 ATA Trade Show in Columbus, Ohio. In summing the two answer, 82% are *very* or *somewhat* likely to attend.
- Among exhibitors, a large percentage (77%) are *very* likely to attend the 2010 Trade Show, and an overwhelming majority (96%) are *very* or *somewhat* likely.

ATTENDING THE 2009 ATA TRADE SHOW: MOTIVATIONS AND CONSTRAINTS

➢ Both surveys examined the motivations for attending/exhibiting at the 2009 Trade Show.

- In an open-ended question, retailers were asked why their company attended the 2009 ATA Trade Show. The majority indicated that it was to see new products/get updated information about the industry. Other relatively common answers included to place orders, because the Trade Show offers good deals/discounts, and to meet with manufacturers, distributors, etc.
- A similar open-ended question asked exhibitors why their company had exhibited at the 2009 Trade Show. Three answers were commonly given: to develop business contacts/ network/build reputation/meet new dealers, to debut new products/present products, and to gain exposure/increase business in general.

- The survey asked retailers a series of nine questions about reasons that they/their company attended the 2009 Trade Show (among those that did). For each reason, respondents were asked to indicate if it was a *very* important reason, a *somewhat* important reason, or a *not at all* important reason. The results were ranked.
  - In looking at *very* important reasons, at the top are to see and learn about new products (91%), to increase product knowledge through discussions with company personnel, other dealers, and seminars (74%), to talk with key manufacturers, distributors, and sales reps (73%), and to save money on buying products (68%).
  - At the bottom are the social- and entertainment-related reasons.

- The survey asked exhibitors 22 questions regarding the importance of factors in their companies' decisions to exhibit at the 2009 Trade Show.
  - Seven reasons were markedly more important than the others: to meet with retailers or buyers (88% said this reason was *very* important in their company's decision to exhibit at the 2009 Trade Show), to meet *new* retailers or buyers (83%), to benefit from the large number of attendees in general on the Trade Show floor (78%), to market their company, brands, and products (77%), to introduce new products (75%), to show their entire product line (74%), and to feature important products (69%).

- Retailers whose company did not attend the 2009 Trade Show were asked in an open-ended question to indicate why their company did not attend. The most common reasons were the economy/could not afford to go (22%), because they attend a different show because of such things as proximity or that they like the other show's dates better (21%), that the location of the ATA Trade Show was inconvenient (13%), or that they did not feel the need to go (12%).

- The survey asked non-attendees a series of fourteen questions about reasons for *not* attending the 2009 Trade Show. The answer set was again *very* important, *somewhat* important, or *not at all* important. The results were then ranked.
  - In looking at *very* important reasons, at the top are the travel distance (44% said this was a *very* important reason for not attending), being able to leave their shop to attend (also

44%), not having enough employees to run the store while they are at the show (43%). These three reasons are markedly above the others. Also important constraints are cost of airfare to/from Indianapolis (33%), cost of gas and wear and tear on vehicles (32%), or not being able to get enough good deals at the show to make it worthwhile (31%).

- Note that within this series of possible reasons for *not* attending was a question asking respondents if they did not attend because they prefer to attend and do business at other shows. If this was a very or somewhat important reason, they were asked to indicate those other shows. The most popular of those other shows are The Shot Show; Kinsey's; NBS; Sports, Inc.; The Matthews Show; and NABA.

ATTENDING THE 2010 ATA TRADE SHOW: MOTIVATIONS AND CONSTRAINTS

- The survey asked all retailers nine questions about the importance of various aspects of the Trade Show itself in their decision on whether to attend the 2010 Trade Show in Columbus, again using the *very* important, *somewhat* important, or *not at all* important answer set. The results were ranked.
  - Four aspects are markedly of more importance in decision-making: to see and learn about new products (78% said this would be *very* important in their decision on whether to attend), to talk with key manufacturers, distributors, and sales reps (67%), to increase technical expertise and knowledge (66%), and to save money on buying products (62%).
  - At the bottom are the social- and entertainment-related reasons.

- The survey asked exhibitors 22 questions about the importance of various aspects of the 2010 Trade Show in making their decision whether to exhibit at the 2010 Trade Show.
  - Similar to the results regarding why they exhibited at the 2009 Trade Show, seven reasons are markedly more important than the others in their decision on whether to exhibit at the 2010 Trade Show: to meet with retailers or buyers (86% said this reason will be *very* important in their company's decision on whether to exhibit at the 2010 Trade Show), to meet *new* retailers or buyers (85%), to benefit from the large number of attendees in general on the Trade Show floor (79%), to show their entire product line (78%), to introduce new products (76%), to market their company, brands, and products (76%), and to feature important products (74%).

- The survey asked retailers eleven questions about the importance of various factors in their decision on whether to attend the 2010 Trade Show. Note that these questions pertained to factors *outside* of the actual Trade Show, such as aspects of Columbus (a previous series had pertained to aspects of the Trade Show itself). These results were ranked.
  - The most important factors, ranked by the percentage saying *very* important, are having enough employees to run the store while they are at the show (36% say this is *very* important), the distance they have to travel (35%), and leaving their shop to attend the show (28%). Just below these are three cost-related items: cost of airfare to Columbus (27%), cost of gas and wear/tear on vehicles (24%), and cost of hotel rooms in Columbus (24%).

- Similar to the above series, the survey asked exhibitors eleven questions about the importance of various factors in their decision on whether to exhibit at the 2010 Trade Show. Again, the results were ranked.
  - Two factors stand out markedly above the others as being *very* important: how well their company does financially in 2009 (56% said this is a *very* important factor) and the cost of booth space (50%). Two additional factors are in a second tier: the dates of the 2010 Trade Show (29%) and the cost of transportation for their booth and people (25%).

- A question that pertains to motivations for attending the 2010 Trade Show asked retailers to indicate the percentage of their annual retail product inventory for sales that they typically order at the ATA Trade Show. A large majority (71%) gave an answer of 50 percent or less, including 14% who place no orders. Nonetheless, 22% say that they order more than half their inventory at the ATA Trade Show. For these latter retailers, an important motivation in attending the 2010 Trade Show is to fill inventory.

- Another question pertains to motivations for attending the 2010 Trade Show. The survey asked retailers to pick one statement out of five that best described the importance of the ATA Trade Show in helping them make buying decisions. The statements were in a scale from no importance ("I don't make *any* buying decisions at the ATA Trade Show") to great importance ("I have to attend the show to ensure that I make good buying decisions"). The most common response was in the middle of the scale ("I make some buying decisions at the show but many before and after"), with 39% giving that answer. Overall, the results form a classic bell curve with the peak in the middle.

- In a question that has implications regarding constraints on exhibiting at the 2010 Trade Show, nearly half of exhibitors (49%) indicated that the cost of booth space for the 2010 Trade Show is too high.
  - In follow-up, those who said the cost was too high were asked to give the reasons that they say the cost is too high. Three reasons stand out: the economy being bad, that the ATA Trade Show compared unfavorably to other shows, and that not enough buyers attended the ATA Trade Show.

- Both surveys examined constraints to attending/exhibiting among those *not at all* likely to do so.
  - The survey asked those retailers who indicated that it was *not at all* likely that their company would attend the 2010 Trade Show to indicate the reasons why, in an open-ended question. Most commonly, the location/distance to travel was a reason, distantly followed by because they go to other shows, they do not have staff available/time constraints, or because of the dates of the 2010 Trade Show.

- Both surveys asked about things that might make respondents more likely to attend/exhibit at the 2010 Trade Show.
  - Those retailers who said that it was only *somewhat* likely or was *not at all* likely that their company would attend the 2010 Trade Show were asked to say what would make their company more likely to attend. Most commonly, answers related to the location or dates of the Trade Show, although the economy/having a good sales year also was mentioned.
  - Those exhibitors who said that it was only *somewhat* likely or was *not at all* likely that their company would exhibit at the 2010 Trade Show were asked to say what would make their company more likely to do so. Most commonly, answers related to lower

costs associated with exhibiting, the economy in general, the location, more robust attendance, and different dates.

SATISFACTION AND DISSATISFACTION WITH THE ATA TRADE SHOW

- Both surveys examined satisfaction or dissatisfaction with the Trade Shows.
  - In answer to a very basic question, the overwhelming majority of retailers (80%) indicated being *very* or *somewhat* satisfied, overall, with the ATA Trade Shows in general. In fact, a majority (59%) are *very* satisfied. The survey then asked specifically about satisfaction with the 2009 Trade Show, among those who attended: 96% were *very* or *somewhat* satisfied, with 77% being *very* satisfied.
    - A similar question asked retailers to rate the benefits of attending ATA Trade Shows in general for their company: the overwhelming majority (87%) rate the benefits as excellent or good, about evenly divided between those two responses. Those who rated it fair or poor were asked in follow-up to indicate why they gave a fair or poor rating: they most commonly gave an answer relating to the benefits not offsetting the costs, that they buy directly from reps (i.e., the Trade Show is not necessary), that other shows are more convenient, and that not enough new products are shown/manufacturers show old and overstocked products.
  - Exhibitors were asked about their overall satisfaction or dissatisfaction with ATA Trade Shows: the overwhelming majority (92%) are *very* or *somewhat* satisfied, about evenly divided between those two responses. They were then asked about their satisfaction/dissatisfaction with specifically the 2009 Trade Show in Indianapolis: 88% were satisfied, with 51% being *very* satisfied; only 6% were dissatisfied.
    - Asked to rate the benefits of exhibiting at the ATA Trade Shows in general for their company, a majority of exhibitors (74%) rate them excellent or good. Those who gave a fair or poor rating most commonly attributed their rating to their feeling that the benefits of exhibiting do not outweigh the costs or that the Trade Show attendance is (perceived to be) poor.

- The survey asked retailers eleven questions about how favorable or unfavorable various factors were in their overall 2009 Trade Show experience. The answer set used the following scale: *very* favorable, *somewhat* favorable, *somewhat* unfavorable, *very* unfavorable, or the factor did not affect the overall experience. The results were ranked.

- Five factors had a majority indicating that it was *very* or *somewhat* favorable in their overall 2009 Trade Show experience: the conditions in and around the convention center in Indianapolis (84% said this was *very* or *somewhat* favorable), the cost of registration (72%), the cost of local restaurants in Indianapolis (64%), the traffic in and around Indianapolis (56%), and the travel distance to Indianapolis (51%).
- Conversely, top *unfavorable* factors are the cost of parking (22% said this was *very* unfavorable) and the cost of food at the Trade Show (22%).

➢ In parallel questions in the exhibitor survey, exhibitors were to rate how favorable 28 factors were in their overall 2009 Trade Show experience, using the same scale that was used above.

- In examining the percentage saying that each factor was *very* favorable, a distinct upper tier emerges, with a majority or near-majority saying the factor was *very* favorable: time allotted for tear down (64%) and setup (63%), getting their staff onto the floor (63%), floor security (63%), floor hours for exhibitors (62%), getting badge holders (59%), conditions of the convention center (55%), organization of the floor (53%), booth move out (50%), management of floor space (48%), and booth space size (48%).
- On the other end, top *unfavorable* factors are the cost of food at the Trade Show (22% said this was *very* unfavorable), unloading at the dock (14%), cost of parking (11%), cost of transportation for their booth and people traveling to/from Indianapolis (10%), travel distance (9%), and the cost of hotel rooms in Indianapolis (8%).

➢ The survey asked retailers to rate 17 aspects of the 2009 Trade Show, using an excellent-good-fair-poor scale (among those who attended the 2009 Trade Show). The results were ranked.

- In looking at the sums of excellent and good responses, four items stand out above the rest: the registration process (91% gave this an excellent or good rating), the Shooting Demonstration Areas (87%), the Show Guide (87%), and the general show signage (87%). A second tier consists of the Featured Products Area (77%), the goodie bags (76%), and the dates of the ATA Trade Show (74%).

- The aspects that had the highest percentages giving a fair or poor rating were the dates of the 2009 Trade Show (25% gave a fair or poor rating), the Real Deal (24%), the Great Giveaway (20%), and the goodie bags (17%).

➢ The survey asked exhibitors to rate 18 aspects of the 2009 Trade Show, again using the excellent-good-fair-poor scale (among those who exhibited at the 2009 Trade Show). The results were ranked.

- In looking at the sums of excellent and good responses, three items stand out above the rest: the Show Guide (85%), the registration process (81%), and the general show signage (80%). Other items to which a majority gave an excellent or good rating are the dates of the ATA Trade Show (67%), the Members Lounge (64%), the Shooting Demonstration Areas (61%), the Featured Products Area (57%), and the Show Daily News Flyer (56%).
- The aspects that had the highest percentages giving a fair or poor rating were the dates of the 2009 Trade Show (29%), the Literature Kiosk (26%), the Great Giveaway (23%), and the Plasma Screen Information (22%).

➢ Open-ended questions asked retailers and exhibitors to indicate any aspects of the ATA Trade Show that they would like to see improved.

- Retailers most commonly said that nothing needed to be improved; otherwise, commonly named improvements include a better location, more discounts on associated expenses such as hotels, more discounts on products at the show, seminars, and better overall organization.
- Exhibitors most commonly said that they wanted lower overall costs associated with going to and exhibiting at the Trade Show, more attendees, or different dates. The second most common response was that nothing needed to be improved.

➢ Exhibitors were asked about their satisfaction or dissatisfaction with the current Trade Show booth space selection system, after having some aspects of it explained. The overwhelming majority (80%) are satisfied, with only 7% being dissatisfied (the rest giving neutral answers).

- Both surveys asked those who read the ATA e-newsletter to rate the quality of the information it provides.
  - In the retailer survey, 84% rate it excellent or good, with 25% rating it excellent.
  - In the exhibitor survey, 85% rate the e-newsletter excellent or good, with 19% rating it excellent.

- Both surveys asked those who read ATA's monthly columns in magazines such as *Inside Archery*, *ArrowTrade*, or *Archery Business* to rate the columns.
  - In the survey of retailers, 88% rate them excellent or good, with 33% rating them excellent.
    - Retailers were asked if they agreed or disagreed that the ATA's monthly columns in those magazines usually feature topics that meet their company's needs: 76% agreed, while only 4% disagreed.
  - In the exhibitors survey, 84% rate the columns excellent or good, with 24% rating them excellent.

SOURCES OF INFORMATION ABOUT THE ATA AND THE TRADE SHOW

- Both surveys asked how respondents preferred to receive information about the ATA Trade Show: by email, fax, or mail.
  - Retailers are about evenly divided between mail (50%) or email (44%); few want information by fax (4%).
  - Exhibitors, on the other hand, almost universally prefer email (87%) over mail (12%) or fax (less than 1%).

- Nearly all retailers surveyed (94%) indicate that they have access to the Internet.
  - The majority of those with Internet access use it to find information related to the archery industry or related to their business frequently (64%), and another 20% use it sometimes (a sum of 84%). Meanwhile, only 16% say they use it rarely or never.

- Both surveys asked about the ArcheryTrade.org website.
  - The majority of retailers do *not* often visit the ArcheryTrade.org website: 46% never visit it, and 31% rarely visit it (a sum of 77%); only 22% sometimes or frequently visit it.
    - Those who visited it at least rarely were asked what information/services they used on the website. They most commonly obtained information about the Trade Show itself and/or industry updates/new product information.
  - Exhibitors are split on visitation to the ArcheryTrade.org website: 45% frequently or sometimes visit it, while 54% rarely or never do so. Note that the middle answers (sometimes or rarely) far exceeded the extremes (frequently or never).
    - Information/services most commonly obtained include information about the show (the top answer by far), contact information, and industry updates.

- Both surveys asked about the ATA e-newsletter.
  - Half of retailers indicate that they read the ATA e-newsletter frequently (30%) or sometimes (20%). Meanwhile, 36% never do so, and 10% only rarely do so.
  - A majority of exhibitors indicate that they read the ATA e-newsletter frequently (44%) or sometimes (24%), for a sum of 68%. Meanwhile, 32% rarely or never do so.

- Both surveys asked about ATA's monthly columns in such magazines as *Inside Archery*, *ArrowTrade*, and *Archery Business*.
  - A large majority of retailers say that they frequently (56%) or sometimes (21%) read the ATA's monthly columns in magazines (a sum of 77%). Meanwhile, 21% rarely or never do so, about evenly divided between those answers.
  - A majority of exhibitors say that they frequently (36%) or sometimes (33%) read the ATA's monthly columns in magazines (a sum of 69%). Meanwhile, 30% rarely or never do so, about evenly divided between those answers.

RETAILERS' AND EXHIBITORS' ADVERTISING AND PROMOTIONS

- Retailers surveyed are split in how much they say they advertise to promote business: 58% say a great deal or moderate amount, while 41% say a little or not at all. Middle answers (moderate, a little) far exceed the extremes (great deal, not at all).

- The survey asked retailers to name the types of advertising that have been the most effective for their company: newspapers (21%), radio (18%), word of mouth (16%), the Internet (10%), and TV (8%) were most commonly named.

- Both surveys asked about social networking tools, such as YouTube or Facebook.
  - Among retailers, 7% indicate using social networking tools, such as YouTube or Facebook, to promote their store and products. A question with a slightly different nuance asked retailers if they had ever used social networking or marketing tools to look for information related to the archery industry or their store: 37% indicated that they had.
    - Those retailers who use social networking tools or marketing tools for promotion overwhelmingly agree (84%) that those tools are beneficial to their store.
  - In a companion question in the exhibitor survey, a substantial percentage of exhibitors (39%) have used social networking or marketing tools to promote their business or provide information. Also, a substantial percentage of exhibitors (42%) have used social networking or marketing tools to look for information related to the archery industry or their business.
    - Those exhibitors who use social networking tools or marketing tools for promotion overwhelmingly agree (92%) that those tools are beneficial to their company.

- When retailers were asked if their store/company is listed on ArcherySearch.com, they most commonly did not know (47%). Meanwhile, 16% indicated that they were listed.
  - Results are mixed among those who are listed regarding whether the listing has benefited their company: while 49% agree that their company has benefited, 16% disagree, and 35% do not know or gave a neutral answer.

- The exhibitor survey asked respondents seven questions about how much of the company's resources are put into various types of advertising, using a scale of 0 to 10, with 0 being no resources and 10 being a great deal of resources. The results were ranked.
  - In looking at means, magazine ads (mean of 4.54), Internet ads (4.26), TV ads (3.62), and email marketing (2.78) are markedly above radio, newspaper, and billboards. Also

shown is the percentages giving a rating of 9 or 10, as well as the percentages giving a rating of 0.

- Following the above series, exhibitors who used each type of advertising were asked to rate its effectiveness. These results were ranked.
  - In looking at means, the most effective (among users of those types) are TV (mean of 6.83), online/Internet ads (5.47), magazine ads (5.37), and email marketing (5.10). Also shown is the percentages giving a rating of 9 or 10, as well as the percentages giving a rating of 0.

- Exhibitors were asked how valuable would advertising in the ATA e-newsletter be to their company if it were available. Just over half say it would be valuable (51%), but most of those responses are in the *somewhat* valuable (40%) rather than the *very* valuable (11%) part of the scale. Meanwhile, 40% say it would be not at all valuable.
  - Answers are nearly exactly the same regarding likelihood that their company would advertise in the ATA e-newsletter: very likely (10%), somewhat likely (41%), not at all likely (43%).

- Exhibitors were asked about the percentages of their marketing efforts that are directed at archers and at bowhunters.
  - Exhibitors were asked to indicate the percentage of their company's marketing that targets archers: The mean is 45.5 percent. Note that 21% said that *no* marketing is targeted at archers, and another 22% gave an answer of less than a quarter of their marketing (a sum of 43% giving an answer of less than a quarter).
  - Regarding the percentage of their company's marketing that targets bowhunters, the mean is 70.3 percent. Only 6% said that *no* marketing was directed at bowhunters, and another 9% gave an answer of less than a quarter of their marketing (a sum of 15% giving an answer of less than a quarter).

INFORMATION ABOUT RETAILERS AND EXHIBITORS SURVEYED

- Both surveys asked about membership in the ATA.
  - A majority of retailers surveyed are members of the ATA (59%).
  - An overwhelming majority of exhibitors are members (or their companies are members) of the ATA (93%).

- A little less than half of retailers surveyed (44%) are members of a buying group. The most common buying groups are NABA; ARRO; Sports, Inc.; and NBS.
  - All retailers were asked to name the percentage of their store products and merchandise that they purchase through a buying group (those not in a buying group could answer none). The majority (53%) answered none. Otherwise, about a third (31%) buy half or more of their merchandise through a buying group.

- Retailers were asked how much of their store merchandise is purchased through a distributor such as Kinsey's, Pape's, Jake's, or H & H. The mean is 44.8 percent.

- The exhibitor survey asked respondents to indicate the percentage of their annual product sales orders that are written at the ATA Trade Show: the large majority (78%) give an answer of 25 percent or less; the mean is 9.1 percent. With similar results, the survey also asked them to indicate the percentage of their annual contracts or business deals that occur at the ATA Trade Show: the large majority (69%) give an answer of 25 percent or less; the mean is 13.5 percent.

- Overwhelmingly, retailers in the survey represent just a single store (92%); nonetheless, 7% of retailers represent more than one store.

- Retailers were asked what percentage of their store's annual sales are accounted for by archery and bowhunting products and equipment: the mean is 66.3 percent. Nearly a third of stores (34%) do all their sales in archery and bowhunting products and equipment.

TABLE OF CONTENTS

Introduction and Methodology 1
Attendance at the ATA Trade Shows, Including Likelihood to Attend the 2010 Trade Show 4
Attending the ATA Trade Show: Motivations and Constraints....................12
The 2009 Trade Show in Indianapolis....................12
The 2010 Trade Show in Columbus....................31
Satisfaction and Dissatisfaction with the ATA Trade Show 59
Sources of Information About the ATA and the Trade Show 108
Retailers' and Exhibitors' Advertising and Promotions....................129
Information About Retailers and Exhibitors Surveyed....................153
About Responsive Management 173

INTRODUCTION AND METHODOLOGY

This study was conducted for the Archery Trade Association (ATA) to determine retailers' and exhibitors' opinions on and attitudes toward various aspects of the annual ATA Trade Show, as well as advertising issues in general. The study entailed two telephone surveys: the first of exhibitors at the ATA Trade Show, and the second of retailers/dealers (hereinafter, referred to simply as "retailers"). Specific aspects of the research methodology are discussed below.

For the surveys, telephones were selected as the preferred sampling medium because of the universality of telephone ownership. In addition, a central polling site at the Responsive Management office allowed for rigorous quality control over the interviews and data collection. Responsive Management maintains its own in-house telephone interviewing facilities. These facilities are staffed by interviewers with experience conducting computer-assisted telephone interviews on the subjects of natural resources and outdoor recreation. The telephone survey questionnaires were developed cooperatively by Responsive Management and that ATA, based in part on past surveys. Responsive Management conducted pre-tests of the questionnaires to ensure proper wording, flow, and logic in the surveys.

To ensure the integrity of the telephone survey data, Responsive Management has interviewers who have been trained according to the standards established by the Council of American Survey Research Organizations. Methods of instruction included lecture and role-playing. The Survey Center Managers and other professional staff conducted project briefings with the interviewers prior to the administration of these surveys. Interviewers were instructed on type of study, study goals and objectives, handling of survey questions, interview length, termination points and qualifiers for participation, interviewer instructions within the survey instrument, reading of the survey instrument, skip patterns, and probing and clarifying techniques necessary for specific questions on the survey instruments. The Survey Center Managers and statisticians monitored the data collection, including monitoring of the actual telephone interviews without the interviewers' knowledge, to evaluate the performance of each interviewer and ensure the integrity of the data. After the interviews were obtained by the interviewers, the Survey Center Managers and/or statisticians checked each completed interview to ensure clarity and completeness.

Interviews were conducted Monday through Friday from 9:00 a.m. to 3:00 p.m. and Saturday noon to 5:00 p.m., local time. A five-callback design was used to maintain the representativeness of the sample, to avoid bias toward people easy to reach by telephone, and to provide an equal opportunity for all to participate. When a respondent could not be reached on the first call, subsequent calls were placed on different days of the week and at different times of the day. The survey was conducted in March and April 2009. Responsive Management obtained a total of 351 completed interviews with retailers/dealers and 204 completed interviews with exhibitors (a total of 555 completed interviews in the two surveys).

The software used for data collection was Questionnaire Programming Language (QPL). The survey data were entered into the computer as each interview was being conducted, eliminating manual data entry after the completion of the survey and the concomitant data entry errors that may occur with manual data entry. The survey instrument was programmed so that QPL branched, coded, and substituted phrases in the survey based on previous responses to ensure the integrity and consistency of the data collection. The analysis of data was performed using Statistical Package for the Social Sciences software as well as proprietary software developed by Responsive Management.

When examining the results of the surveys, keep in mind that there are several types of questions.

- Open-ended questions are those in which no answer set is read to the respondents; rather, they can respond with anything that comes to mind from the question.
- Close-ended questions have an answer set from which to choose.
- Some questions allow only a single response, while other questions allow respondents to choose all that apply. Those that allow more than a single response are indicated on the graphs with the label, “Multiple Responses Allowed.”
- Many closed-ended questions (but not all) are in a scale, such as excellent-good-fair-poor. Some even use a number scale from 0 to 10.
- Many questions are part of a series, and the results are primarily intended to be examined relative to the other questions in that series (although results of the questions individually can also be valuable).

Note that some results may not sum to exactly 100% because of rounding. Additionally, rounding on the graphs may cause apparent discrepancies of 1 percentage point between the graphs and the reported results of combined responses (e.g., when “strongly agree” and “moderately agree” are summed to determine the total percentage in agreement).

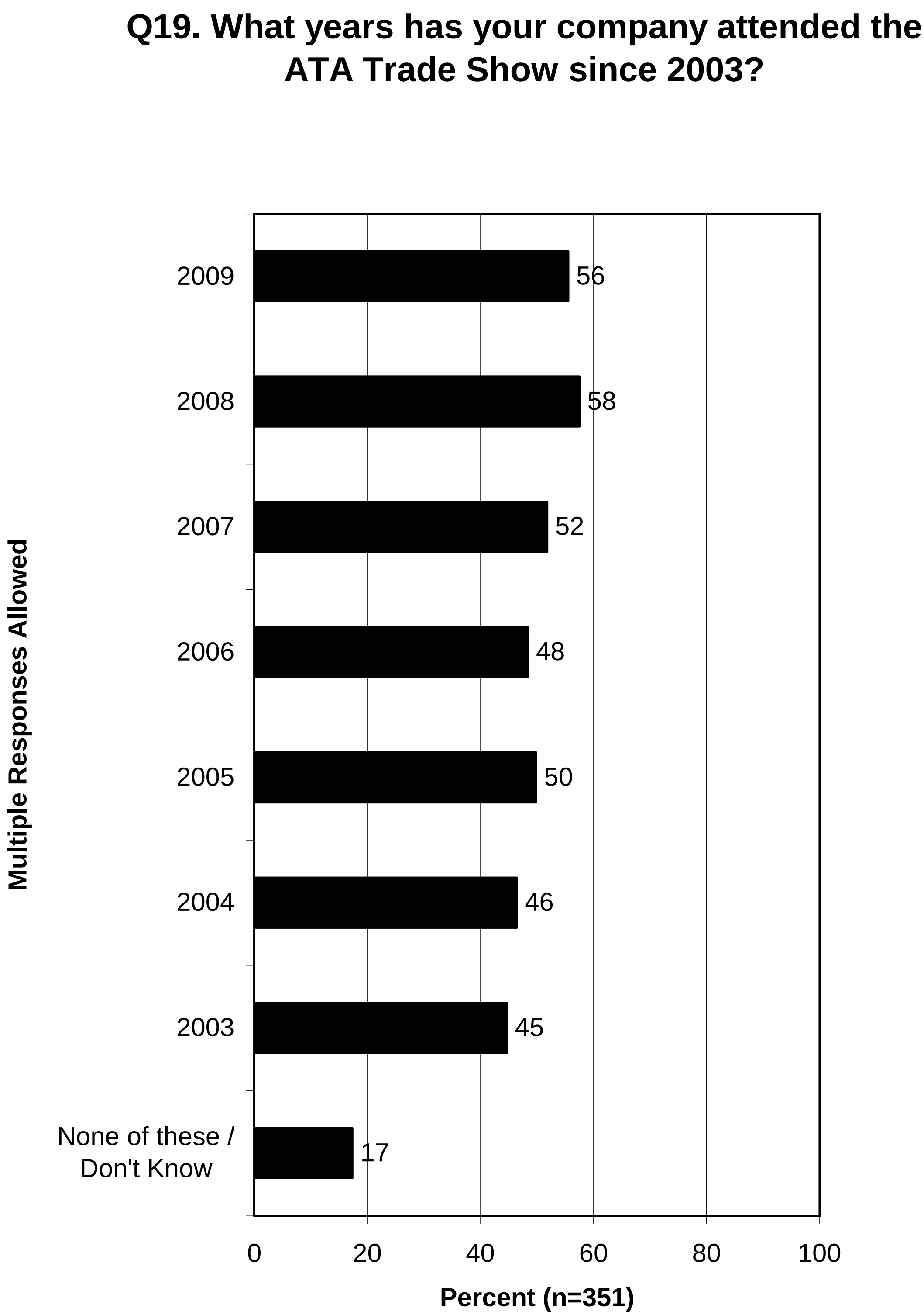
ATTENDANCE AT THE ATA TRADE SHOWS, INCLUDING LIKELIHOOD TO ATTEND THE 2010 TRADE SHOW

- The surveys asked about years retailers attended the Trade Shows and exhibitors exhibited at the Trade Shows.
  - The years that retailers' companies had attended the ATA Trade Shows since 2003 is shown. In 2009, 56% of retailers' companies that were surveyed had attended the Trade Show.
  - Among exhibitors who were surveyed, the percentage whose company had exhibited at the various Trade Shows ranged from 51% in the 2003 Trade Show to 99% in the 2009 Trade Show.

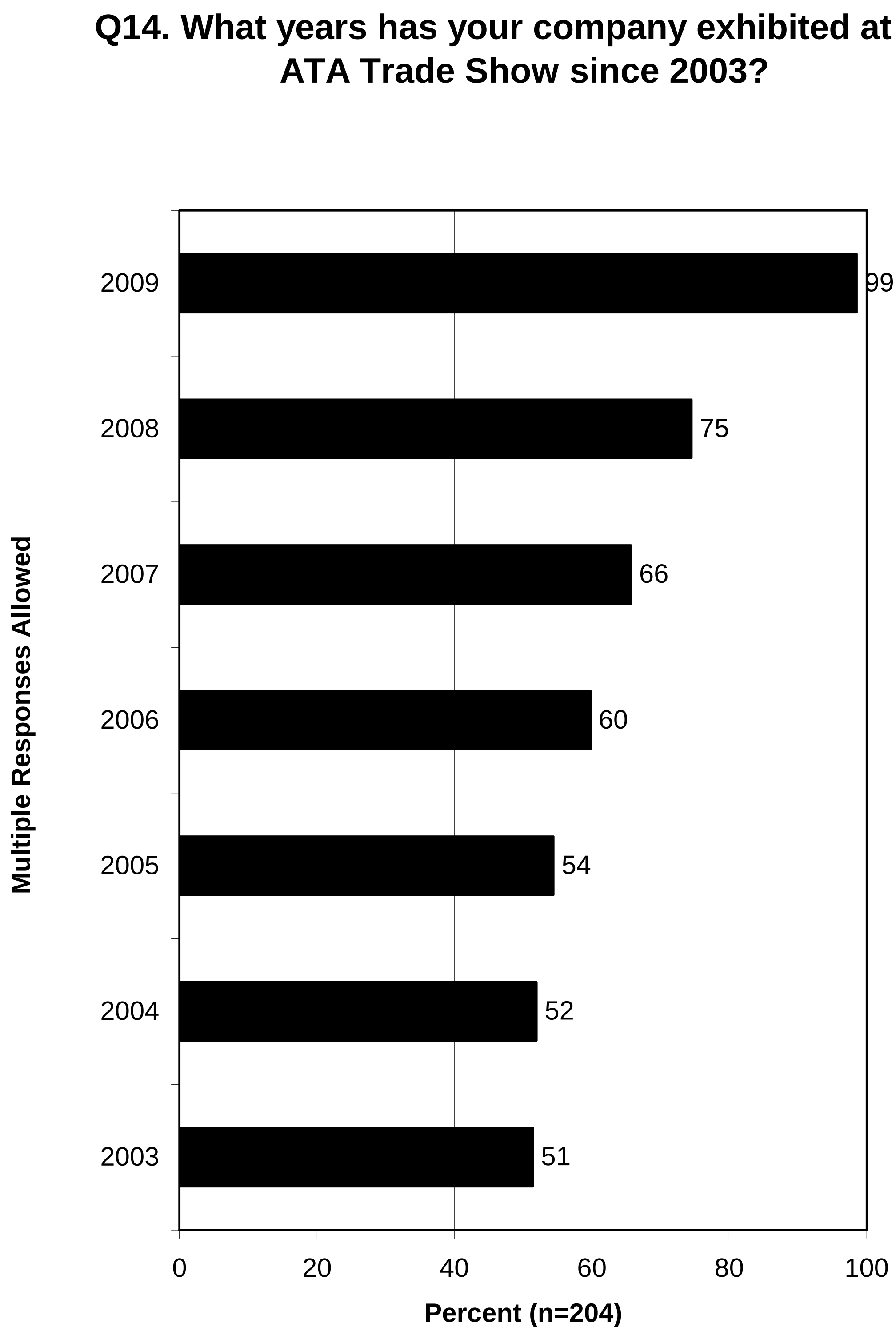
- Both surveys asked about travel distances to the 2009 Trade Show.
  - Distances that retailers traveled to attend the 2009 ATA Trade Show varied widely. While 15% traveled 200 miles or less, 28% traveled more than 500 miles. The median distance was 400 miles.
    - Nearly three-fourths of those retailers who attended the 2009 ATA Trade Show (72%) drove to the show; meanwhile, 28% flew.
  - Exhibitors also traveled widely varying distances; they most commonly indicated a distance that they traveled to attend the 2009 ATA Trade Show of between 500 and 1,000 miles. Of this group, 8% traveled 200 miles or less, while 54% traveled more than 500 miles. Their median distance was 700 miles.

- Likelihood to attend/exhibit at the 2010 Trade Show was examined.
  - A majority of retailers surveyed indicated that it is *very* likely (58%) that they/their company will attend the 2010 ATA Trade Show in Columbus, Ohio. In summing the two answer, 82% are *very* or *somewhat* likely to attend.
  - Among exhibitors, a large percentage (77%) are *very* likely to attend the 2010 Trade Show, and an overwhelming majority (96%) are *very* or *somewhat* likely.

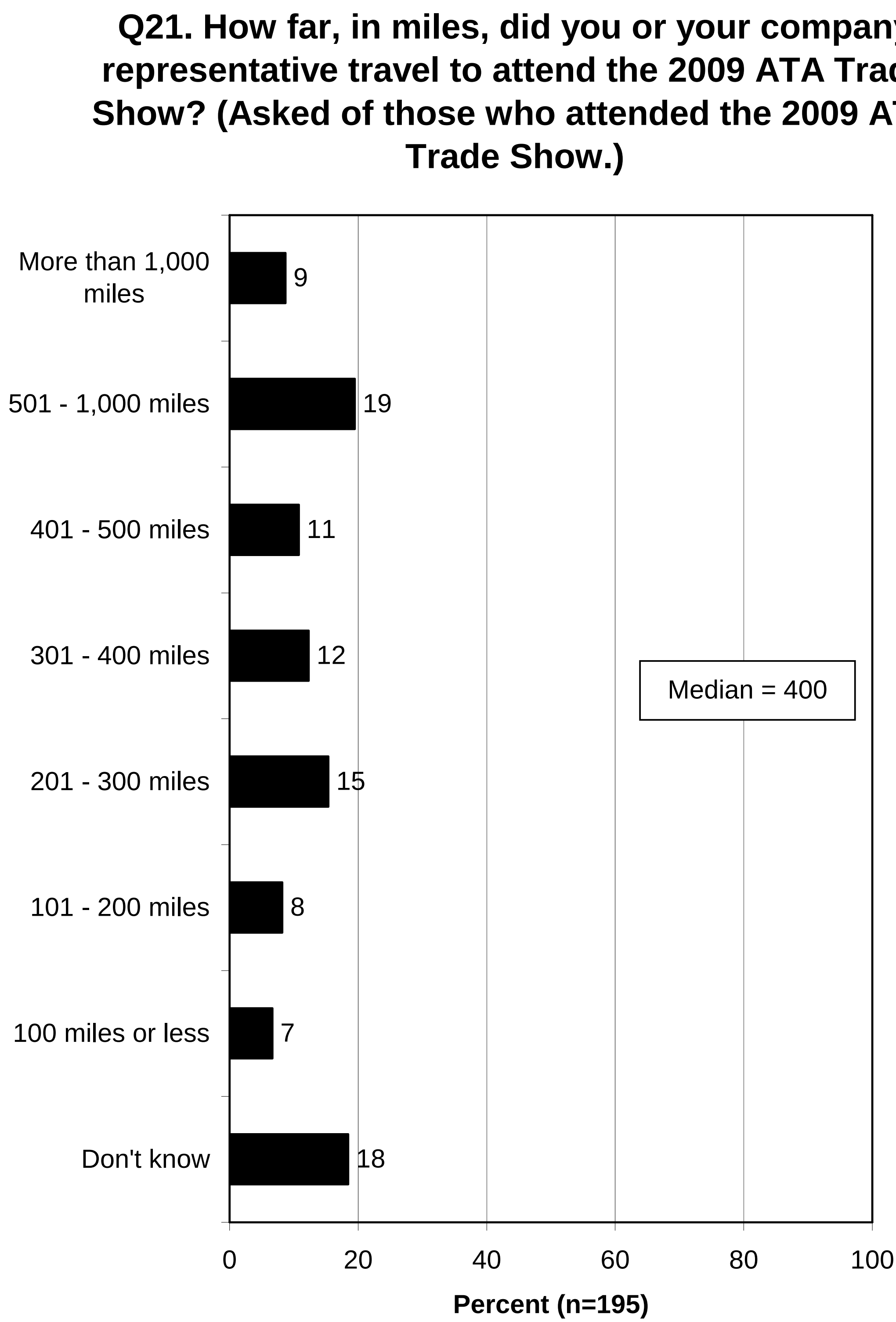
Retailers Survey



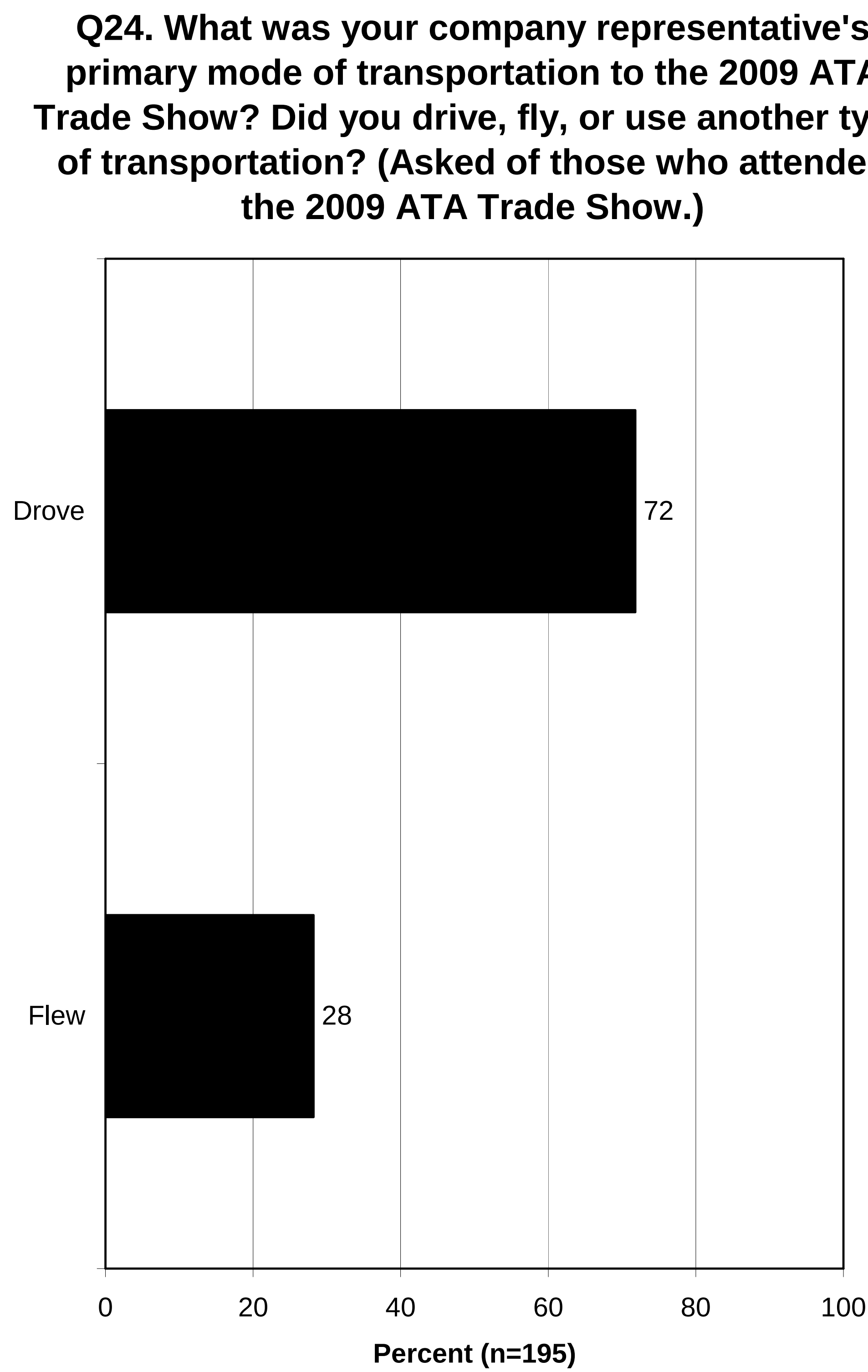
Exhibitors Survey



Retailers Survey

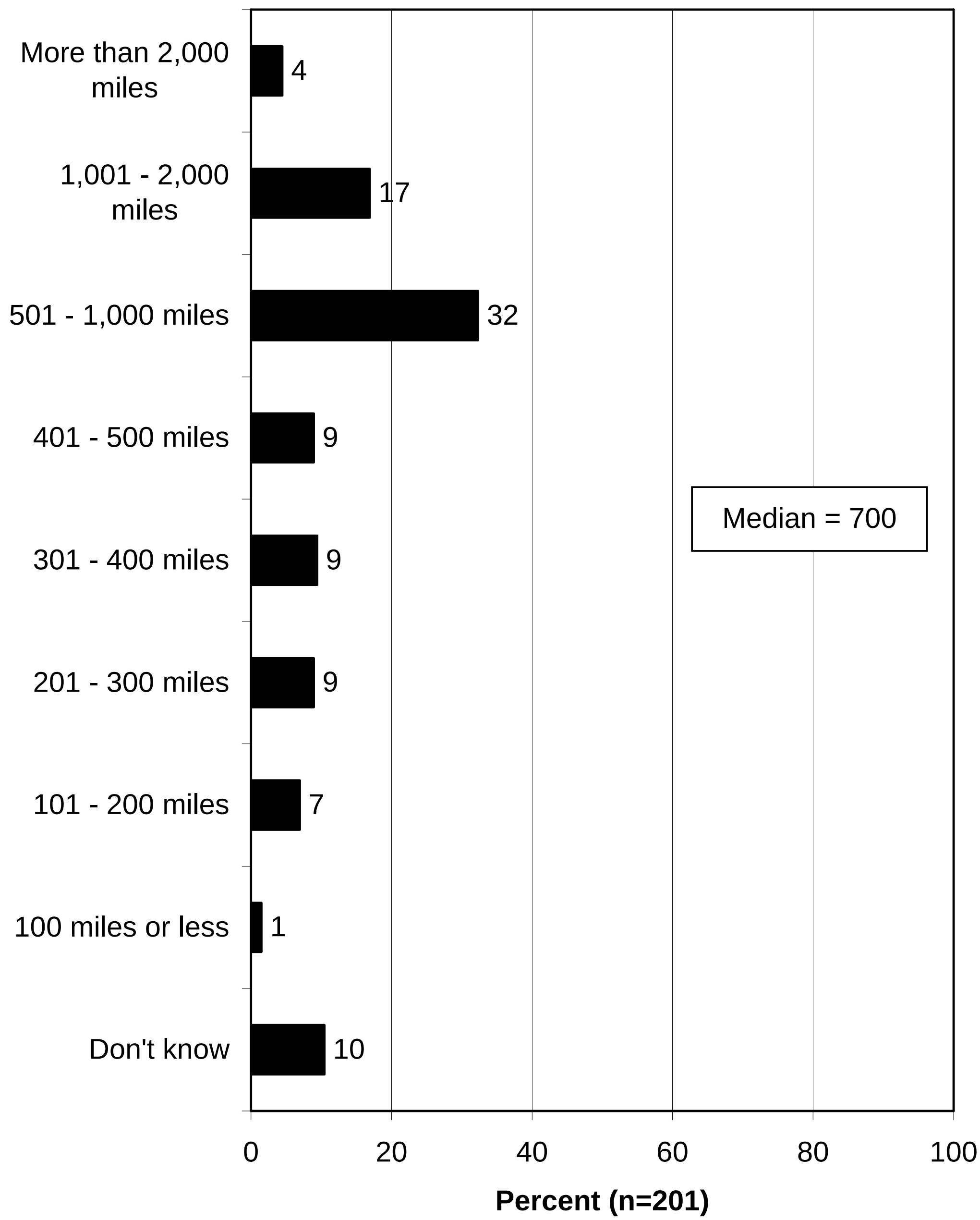


Retailers Survey



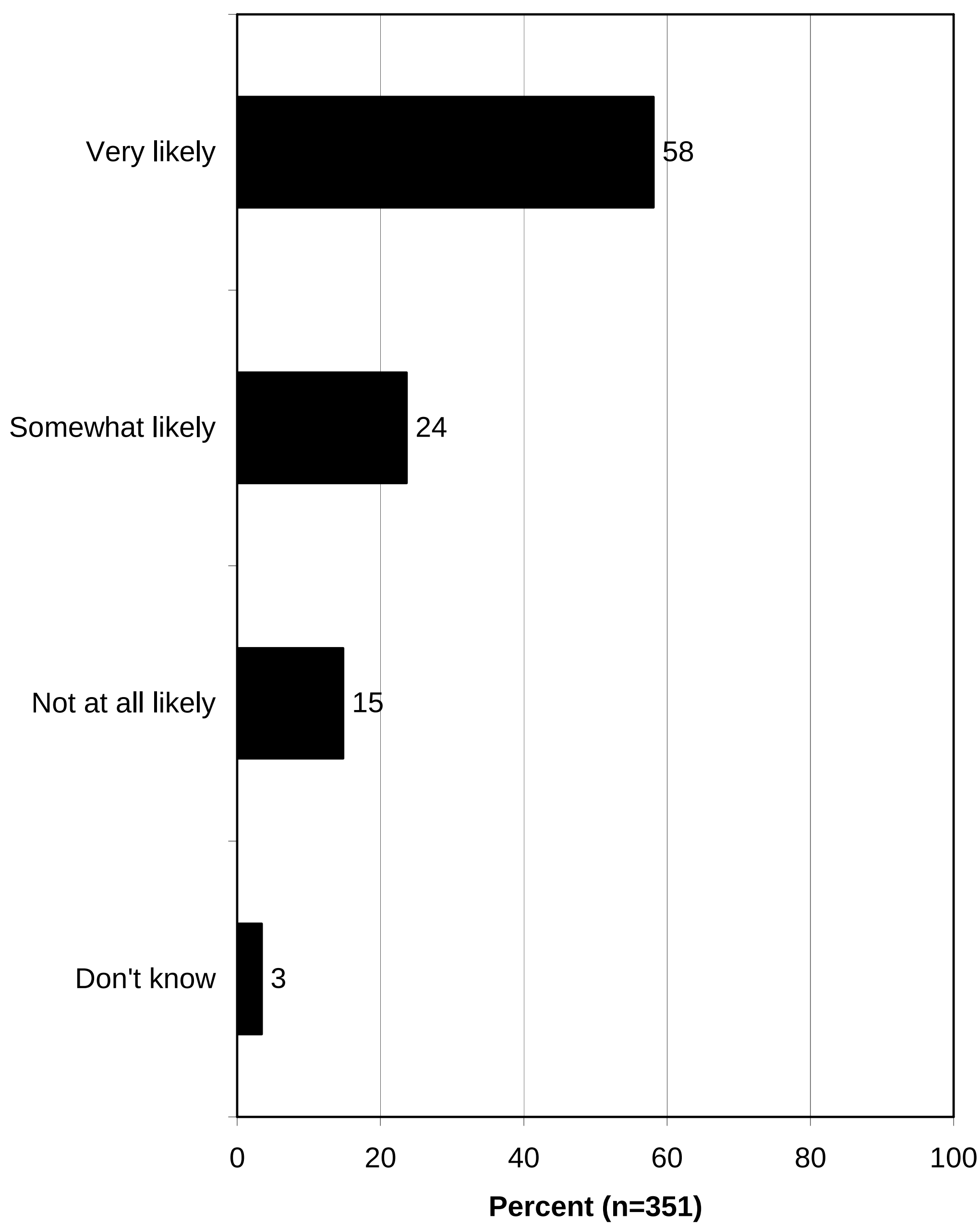
Exhibitors Survey

Q16. How far, in miles, did you or your company travel to exhibit at the 2009 ATA Trade Show? (Asked of those who exhibited at the 2009 ATA Trade Show.)



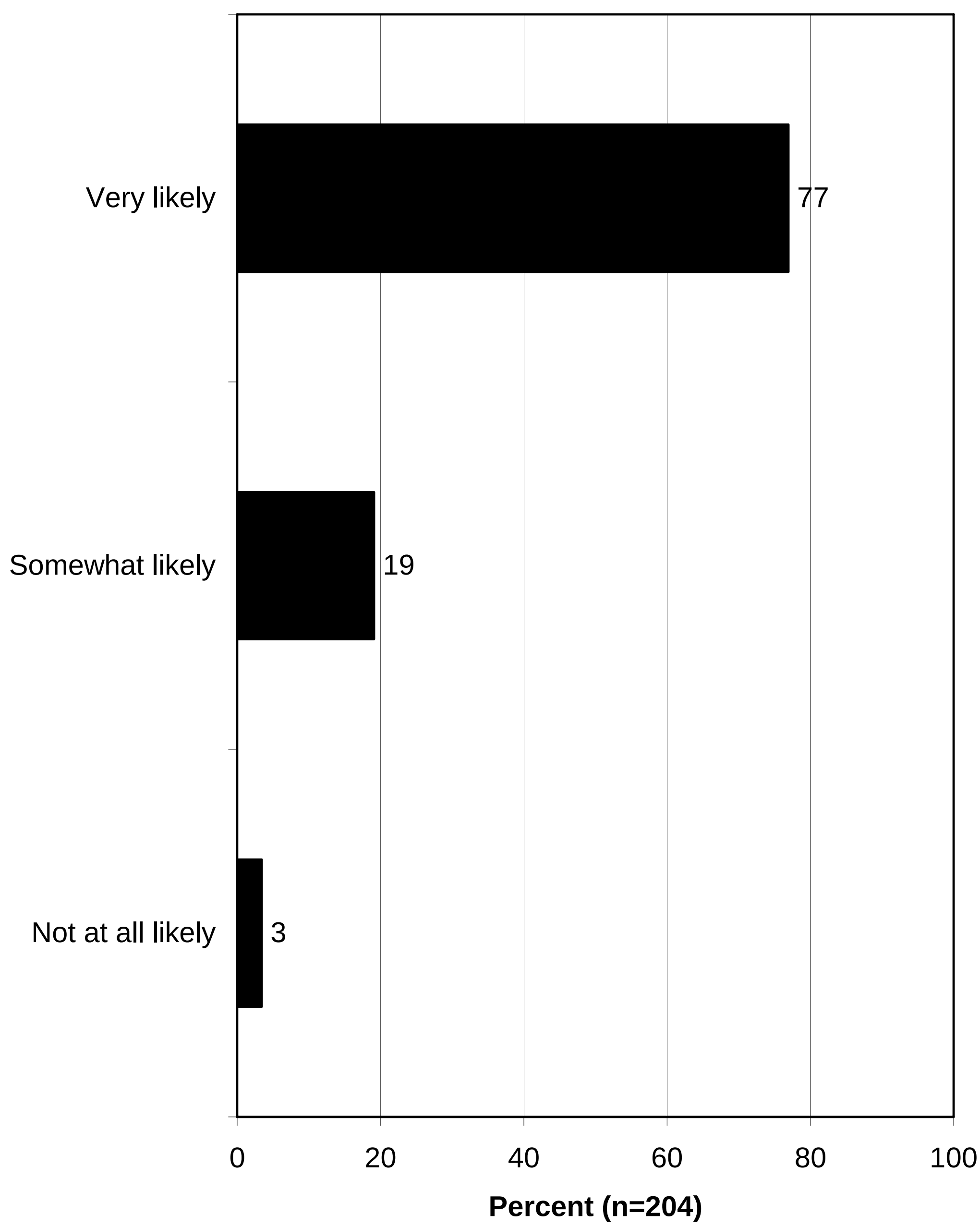
Retailers Survey

Q130. Is your company very, somewhat, or not at all likely to attend the 2010 ATA Trade Show in Columbus, Ohio, January 13-15, 2010?



Exhibitors Survey

Q171. Is your company very, somewhat, or not at all likely to exhibit the 2010 ATA Trade Show in Columbus, Ohio, January 13-15, 2010?



ATTENDING THE ATA TRADE SHOW: MOTIVATIONS AND CONSTRAINTS

THE 2009 TRADE SHOW IN INDIANAPOLIS

- Both surveys examined the motivations for attending/exhibiting.
  - In an open-ended question, retailers were asked why their company attended the 2009 ATA Trade Show. The majority indicated that it was to see new products/get updated information about the industry. Other relatively common answers included to place orders, because the Trade Show offers good deals/discounts, and to meet with manufacturers, distributors, etc.
  - A similar open-ended question asked exhibitors why their company had exhibited at the 2009 Trade Show. Three answers were commonly given: to develop business contacts/ network/build reputation/meet new dealers, to debut new products/present products, and to gain exposure/increase business in general.

- The survey asked retailers a series of nine questions about reasons that they/their company attended the 2009 Trade Show (among those that did). For each reason, respondents were asked to indicate if it was a *very* important reason, a *somewhat* important reason, or a *not at all* important reason. The results were ranked.
  - In looking at *very* important reasons, at the top are to see and learn about new products (91%), to increase product knowledge through discussions with company personnel, other dealers, and seminars (74%), to talk with key manufacturers, distributors, and sales reps (73%), and to save money on buying products (68%).
  - At the bottom are the social- and entertainment-related reasons.
  - Following this series, the survey allowed retailers to indicate any other reasons that may have been important in deciding to attend the 2009 Trade Show. Few respondents had other important reasons; among those who did, the top reasons were seminars/classes and to gain knowledge/experience.

- The survey asked exhibitors 22 questions regarding the importance of factors in their companies' decisions to exhibit at the 2009 Trade Show.
  - Seven reasons were markedly more important than the others: to meet with retailers or buyers (88% said this reason was *very* important in their company's decision to exhibit at the 2009 Trade Show), to meet *new* retailers or buyers (83%), to benefit from the large number of attendees in general on the Trade Show floor (78%), to market their company, brands, and products (77%), to introduce new products (75%), to show their entire product line (74%), and to feature important products (69%).
  - Following this series, the survey allowed exhibitors to indicate any other reasons that may have been important in deciding to exhibit at the 2009 Trade Show. Networking was the most important of those reasons.

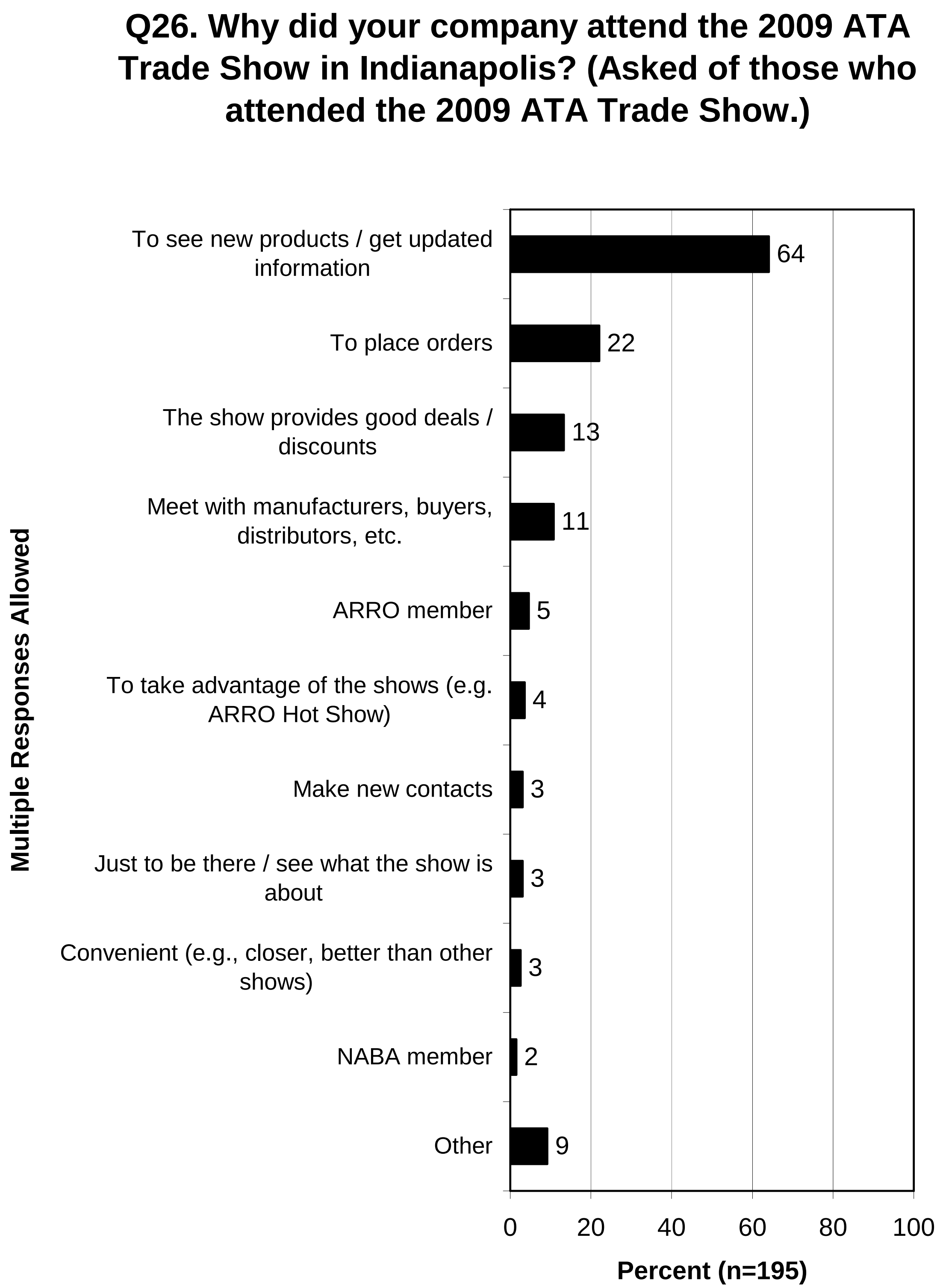
- Retailers whose company did not attend the 2009 Trade Show were asked in an open-ended question to indicate why their company did not attend. The most common reasons were the economy/could not afford to go (22%), because they attend a different show because of such things as proximity or that they like the other show's dates better (21%), that the location of the ATA Trade Show was inconvenient (13%), or that they did not feel the need to go (12%).

- The survey asked non-attendees a series of fourteen questions about reasons for *not* attending the 2009 Trade Show. The answer set was again *very* important, *somewhat* important, or *not at all* important. The results were then ranked.
  - In looking at *very* important reasons, at the top are the travel distance (44% said this was a *very* important reason for not attending), being able to leave their shop to attend (also 44%), not having enough employees to run the store while they are at the show (43%). These three reasons are markedly above the others. Also important constraints are cost of airfare to/from Indianapolis (33%), cost of gas and wear and tear on vehicles (32%), or not being able to get enough good deals at the show to make it worthwhile (31%). (Graphs also show the combined percentages saying *very* or *somewhat* important.)
  - Note that within this series of possible reasons for *not* attending was a question asking respondents if they did not attend because they prefer to attend and do business at other shows. If this was a very or somewhat important reason, they were asked to indicate

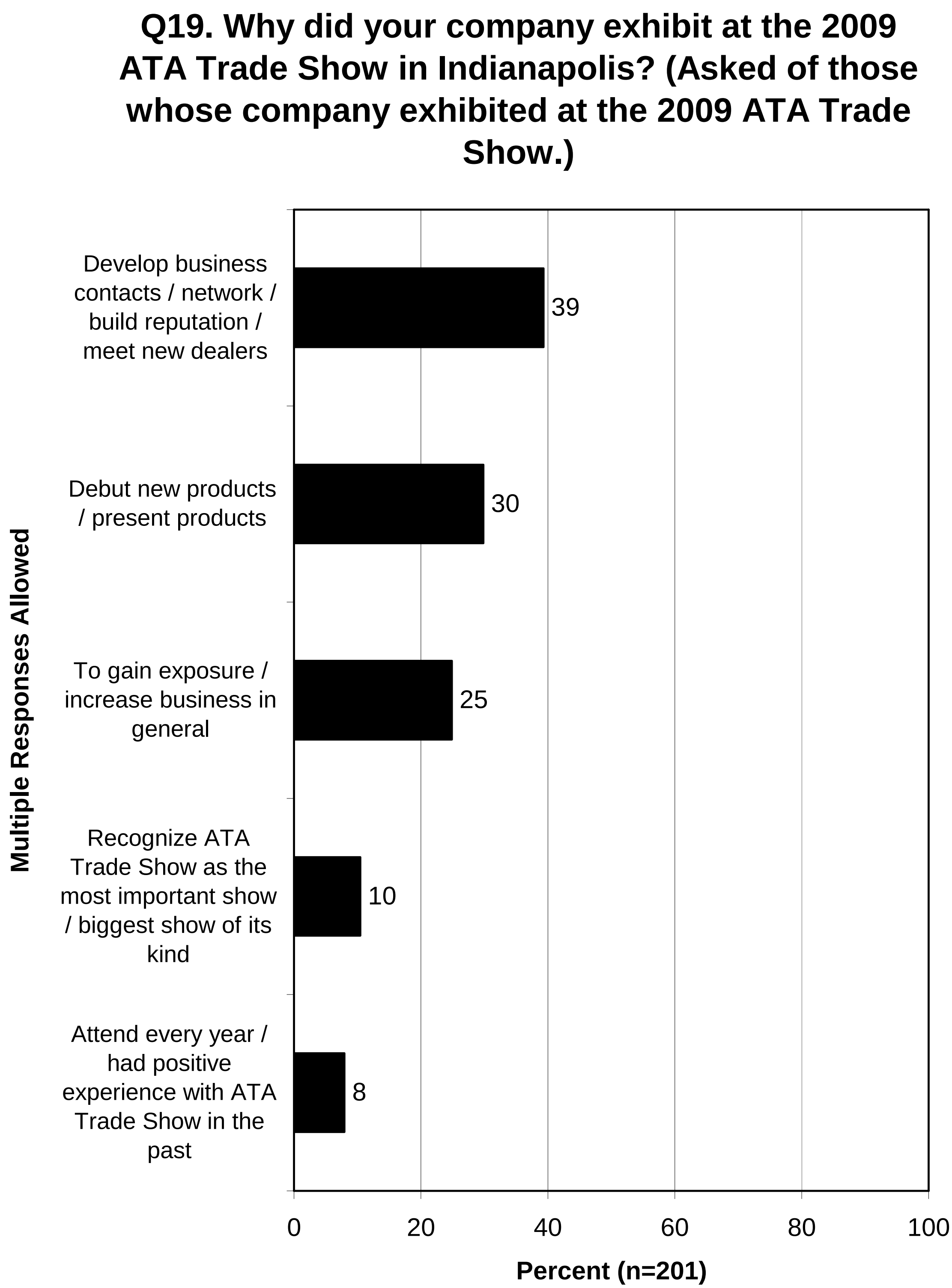
those other shows. The most popular of those other shows are The Shot Show; Kinsey's; NBS; Sports, Inc.; The Matthews Show; and NABA.

- Following this series, the survey allowed retailers to indicate any other reasons that may have been important in deciding to *not* attend the 2009 Trade Show. Among those retailers who had other important reasons, the top ones were that the dates of the 2009 Trade Show were inconvenient, that the location was inconvenient, that they did not feel attending to be worthwhile, or that they did not know enough about the ATA/were new members.

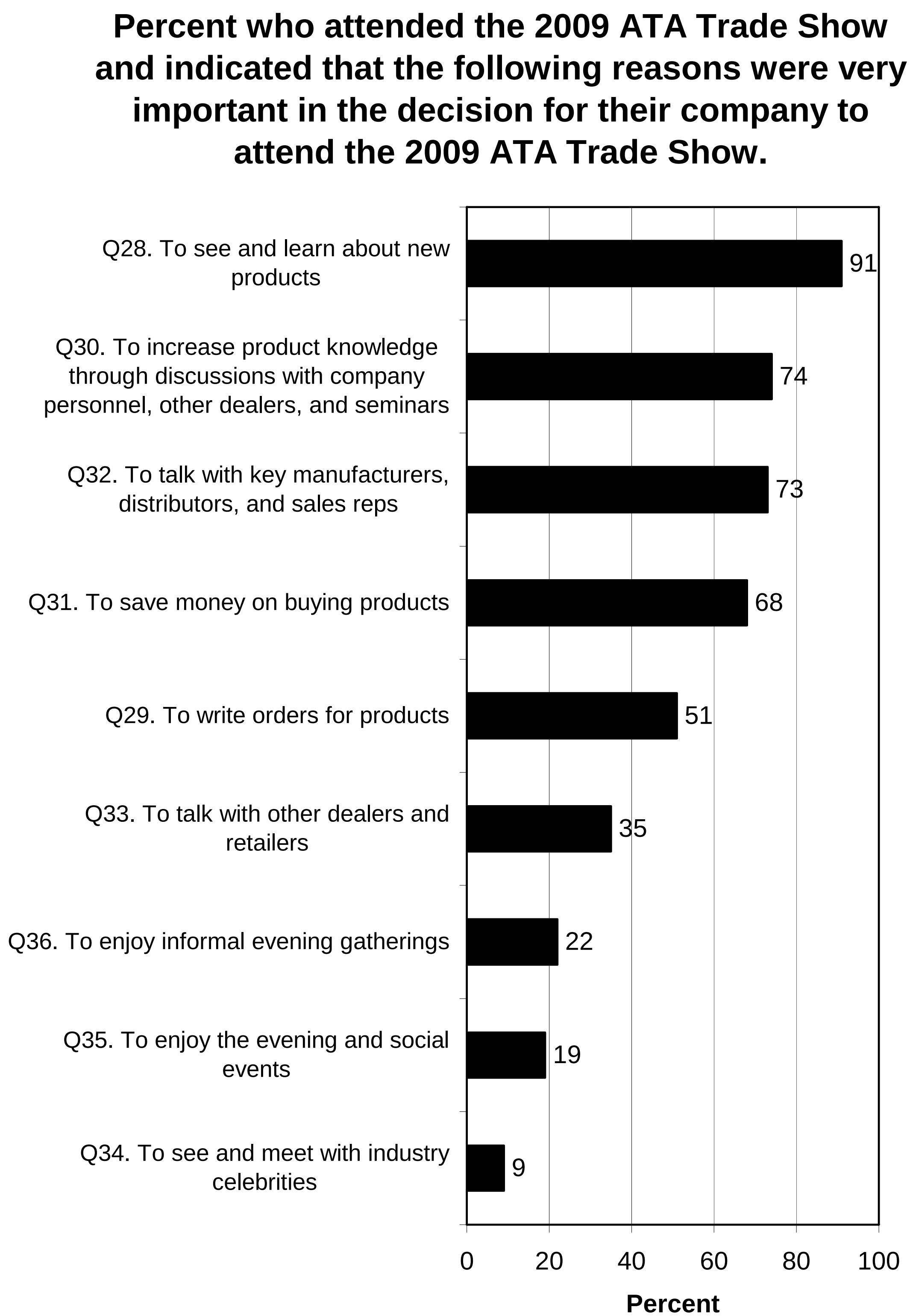
Retailers Survey



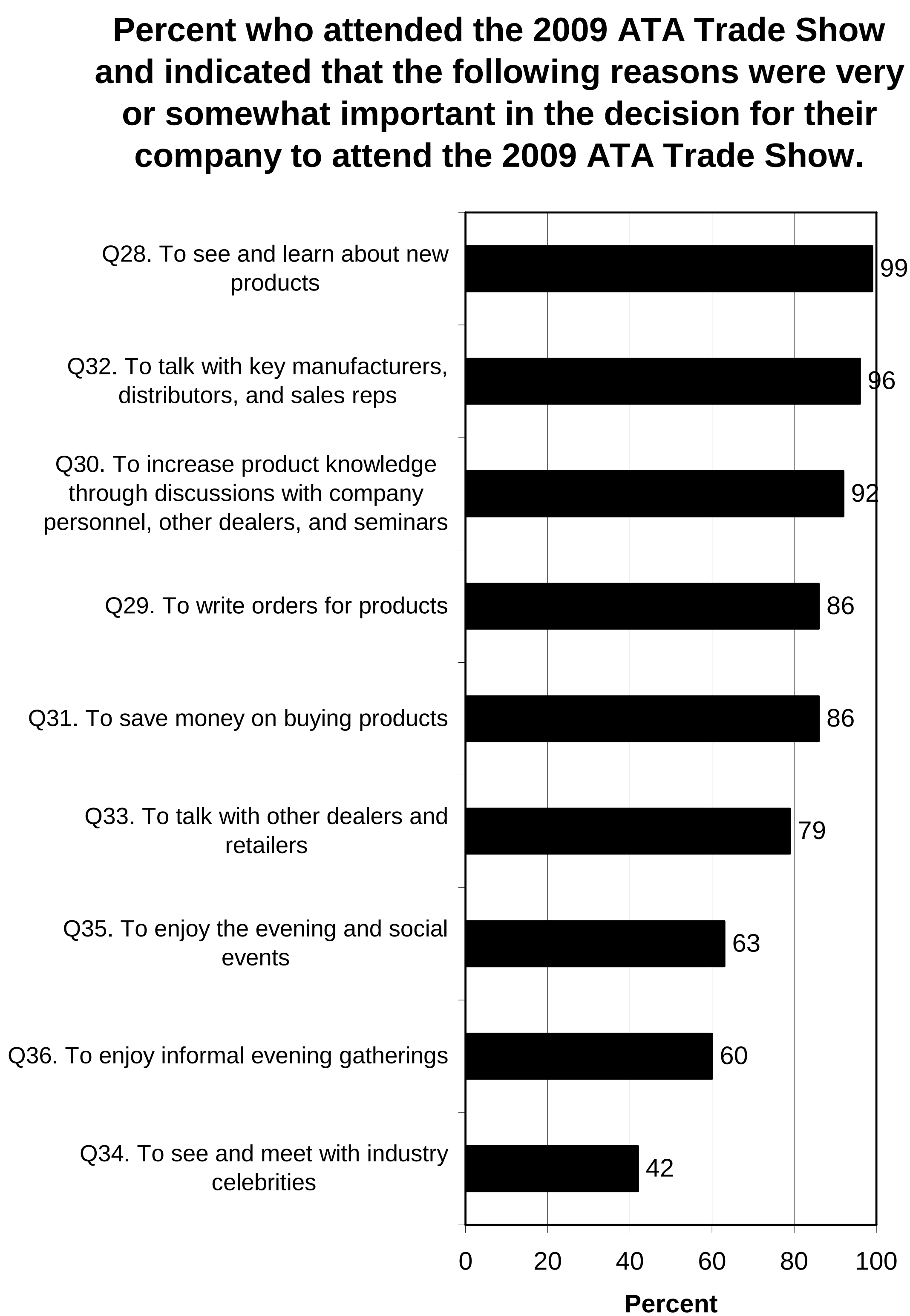
Exhibitors Survey



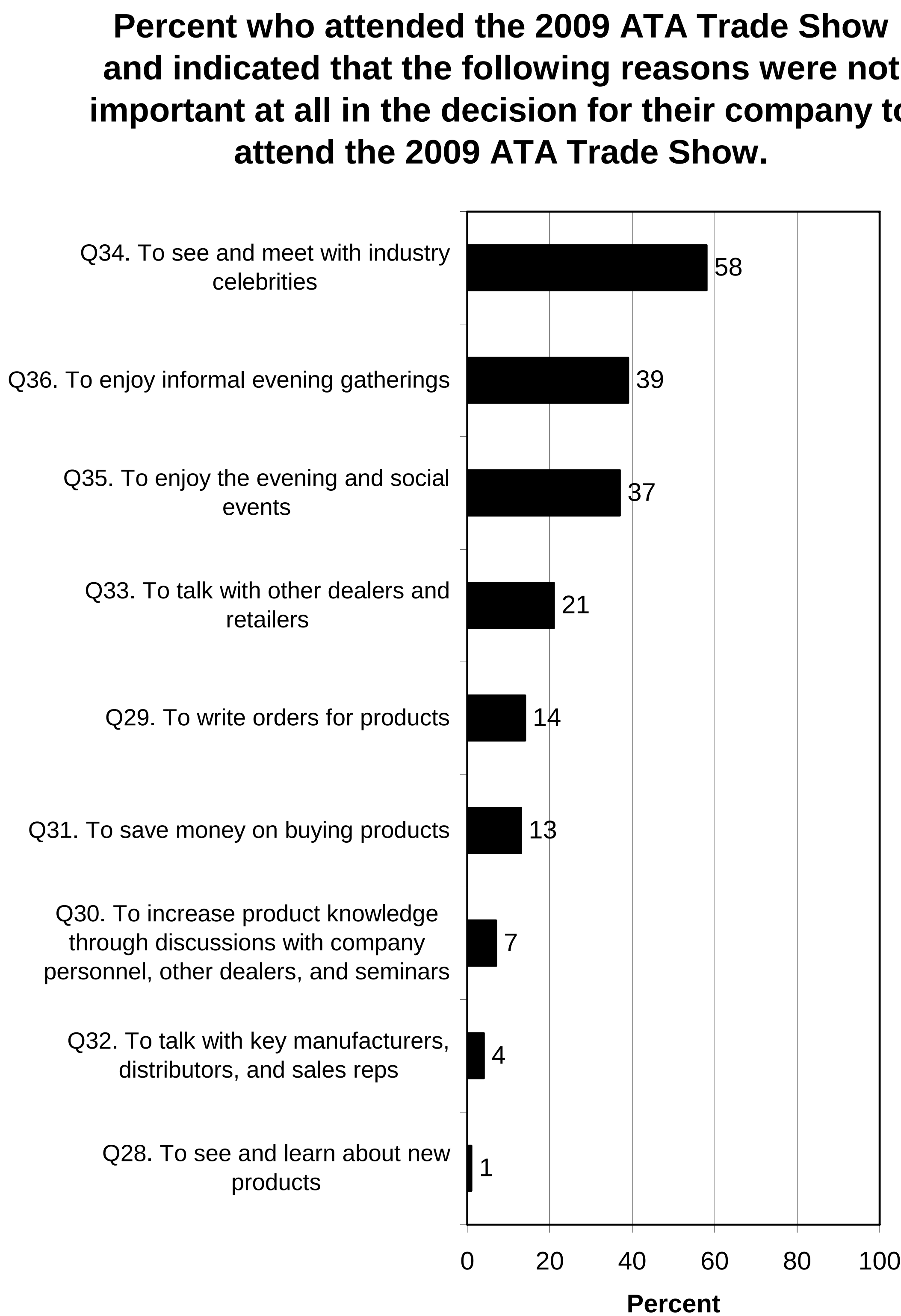
Retailers Survey



Retailers Survey



Retailers Survey

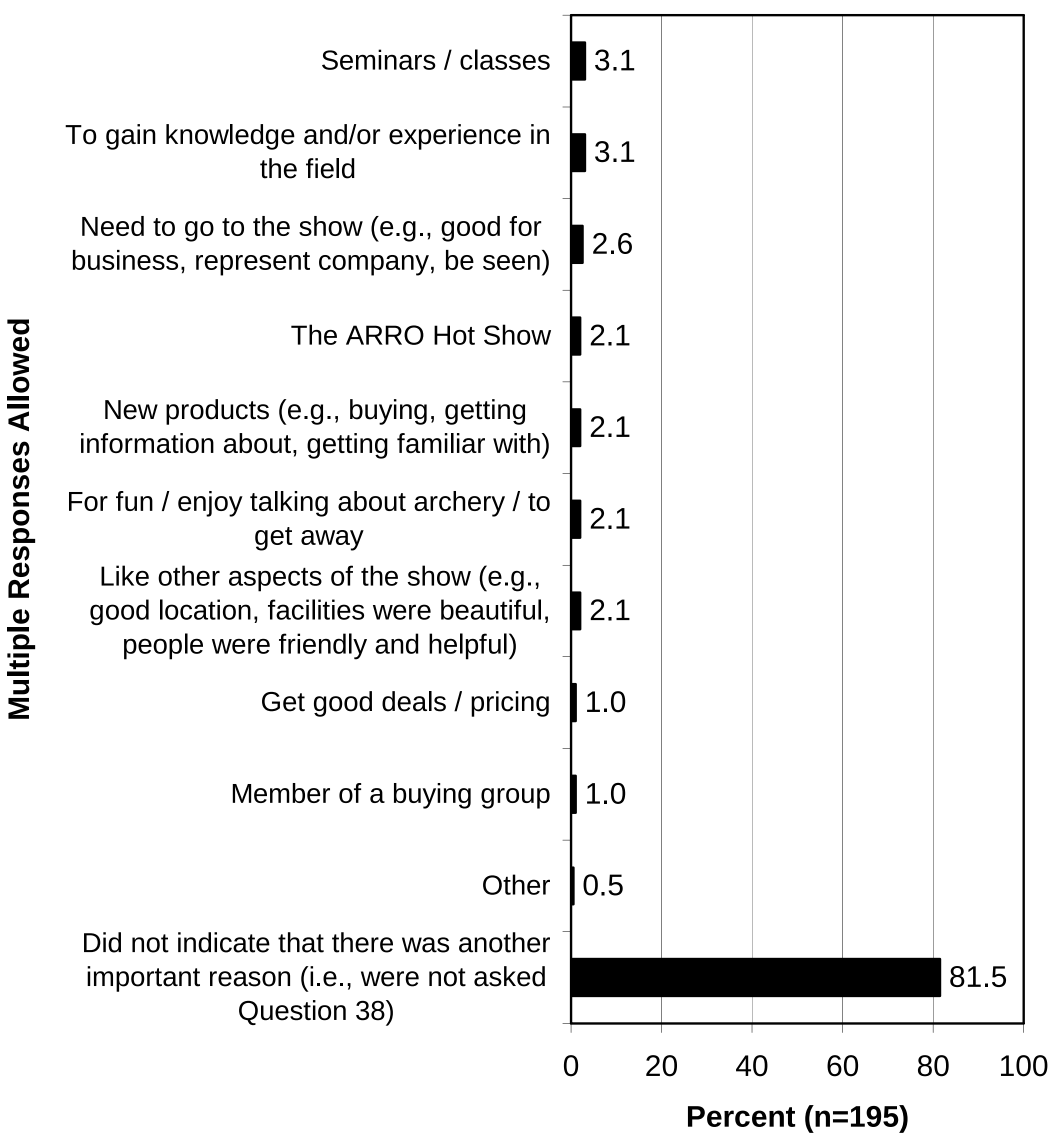


Retailers Survey

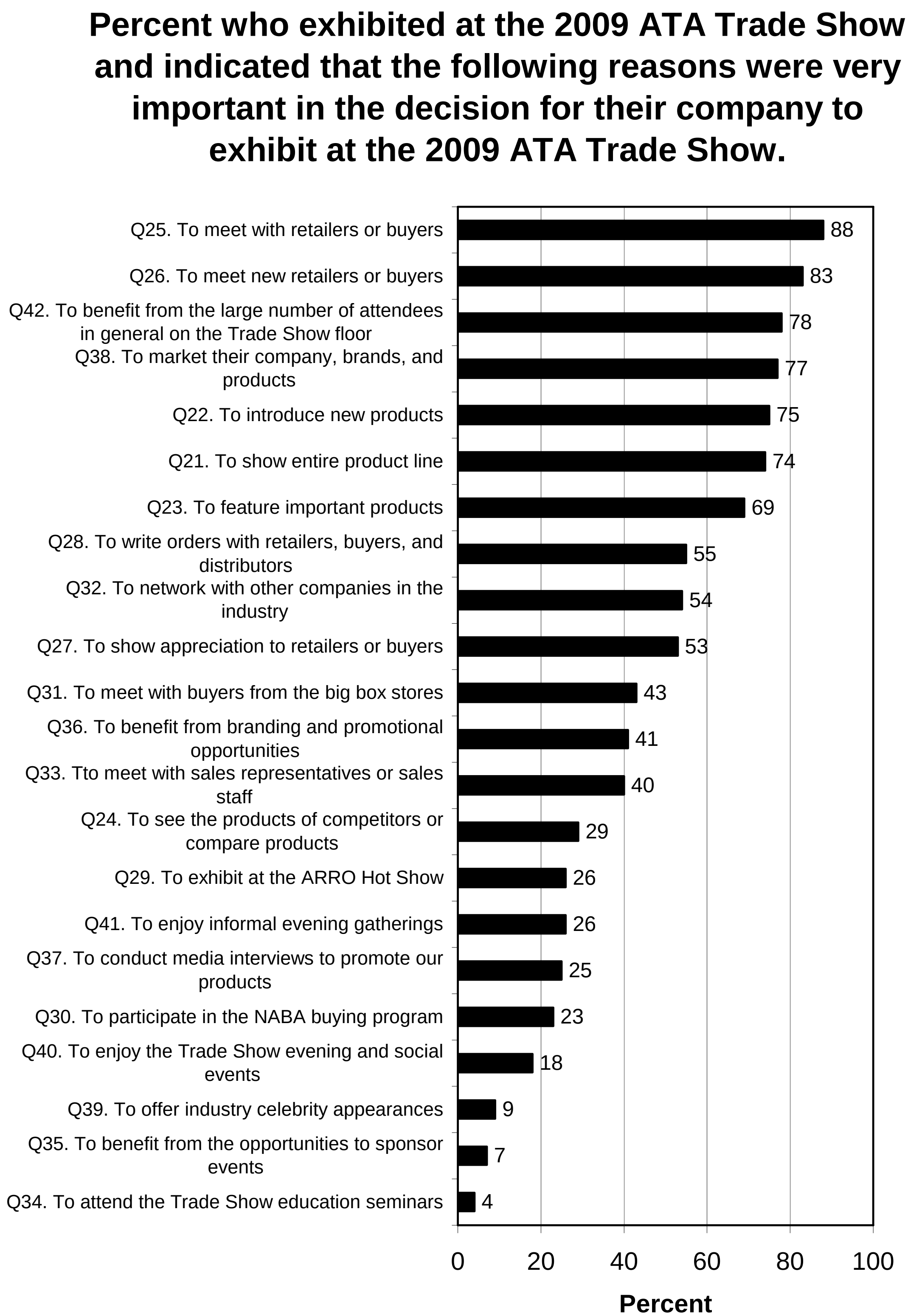
Q37. Are there any other reasons that were important in the decision for your company to attend the 2009 ATA Trade Show?

Q38. What are the other reasons?

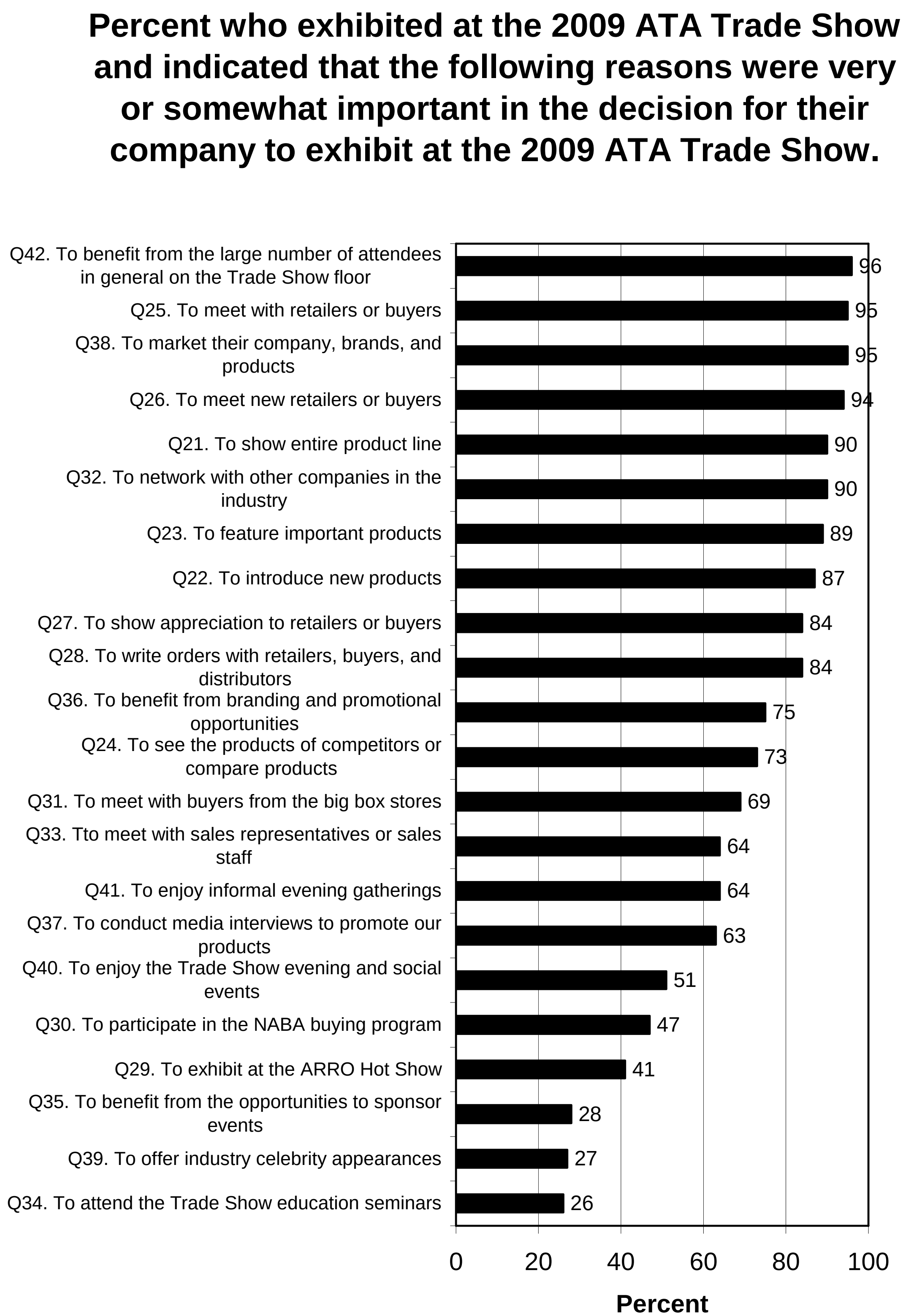
(Among those who attended the 2009 ATA Trade Show.)



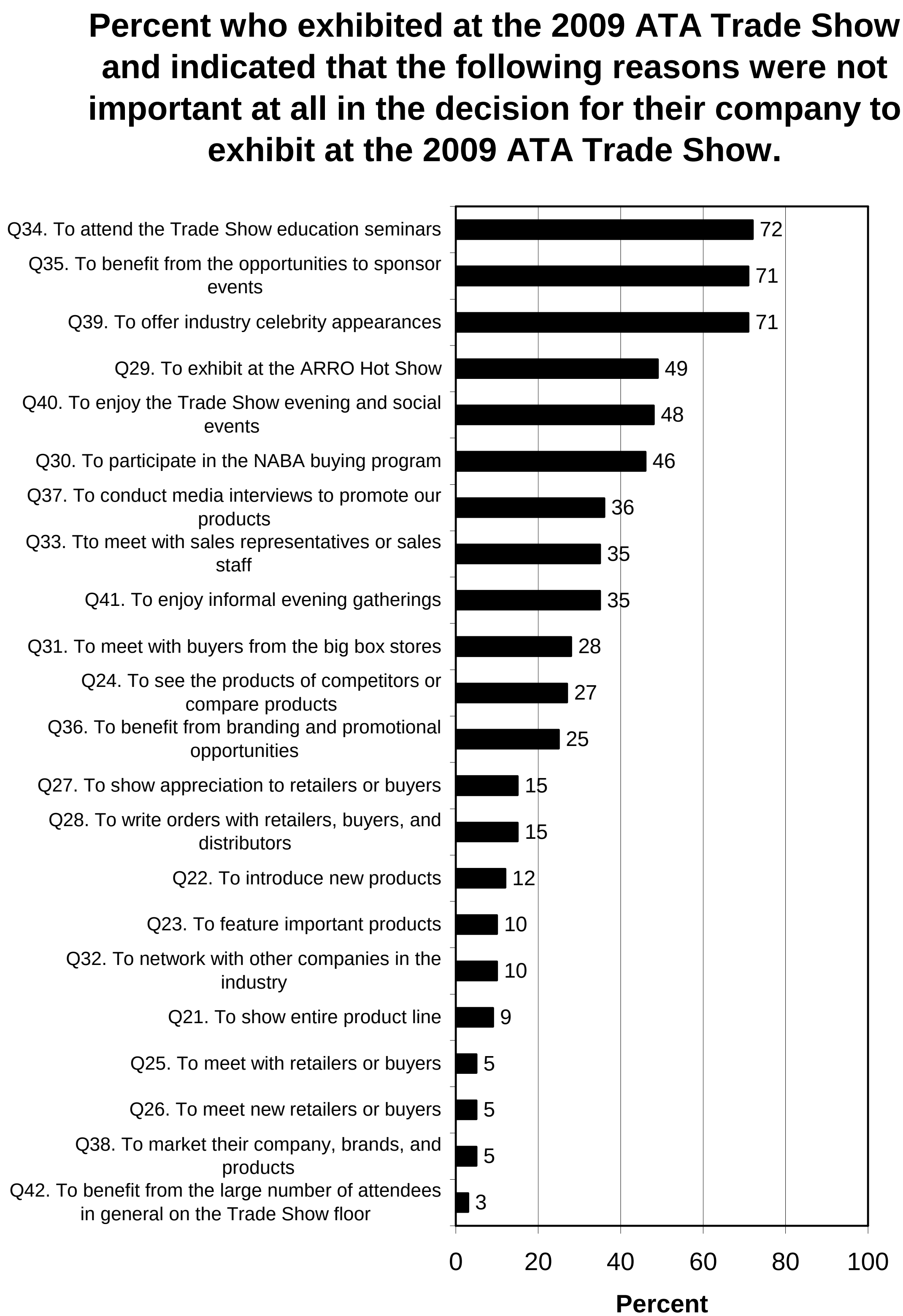
Exhibitors Survey



Exhibitors Survey



Exhibitors Survey

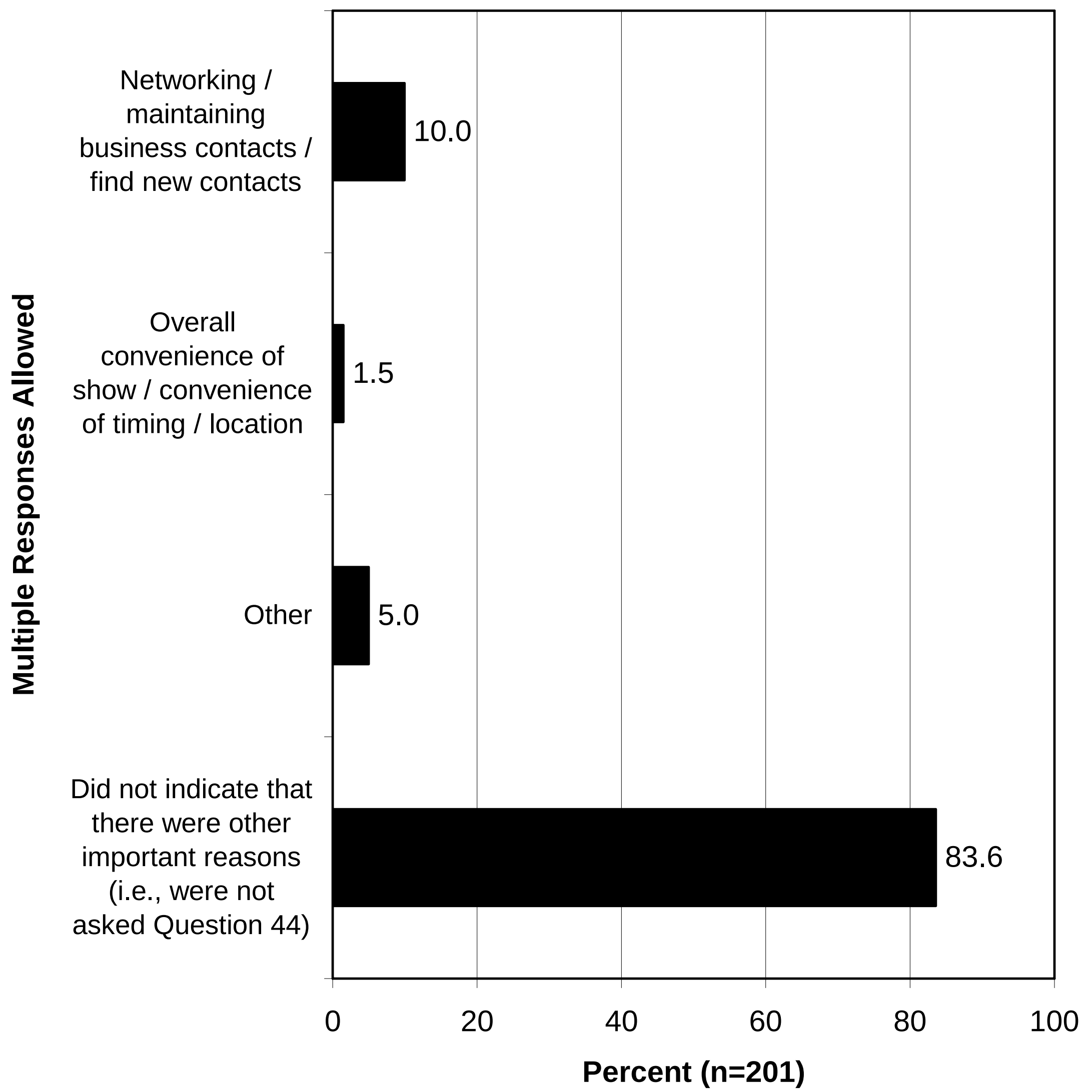


Exhibitors Survey

Q43. Are there any other reasons that were important in the decision for your company to exhibit at the 2009 ATA Trade Show?

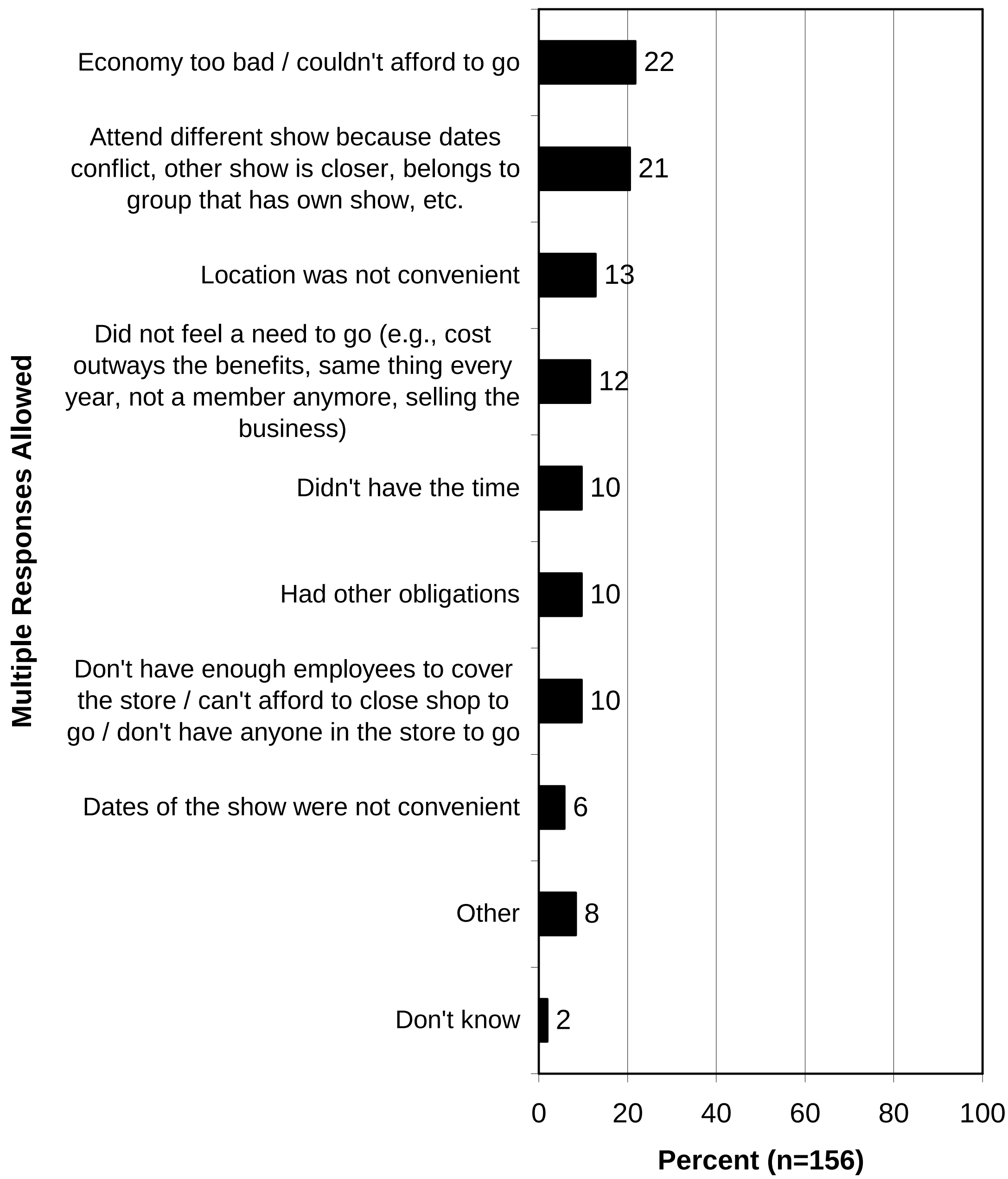
Q44. What are the other reasons?

(Among those whose company exhibited at the 2009 ATA Trade Show.)

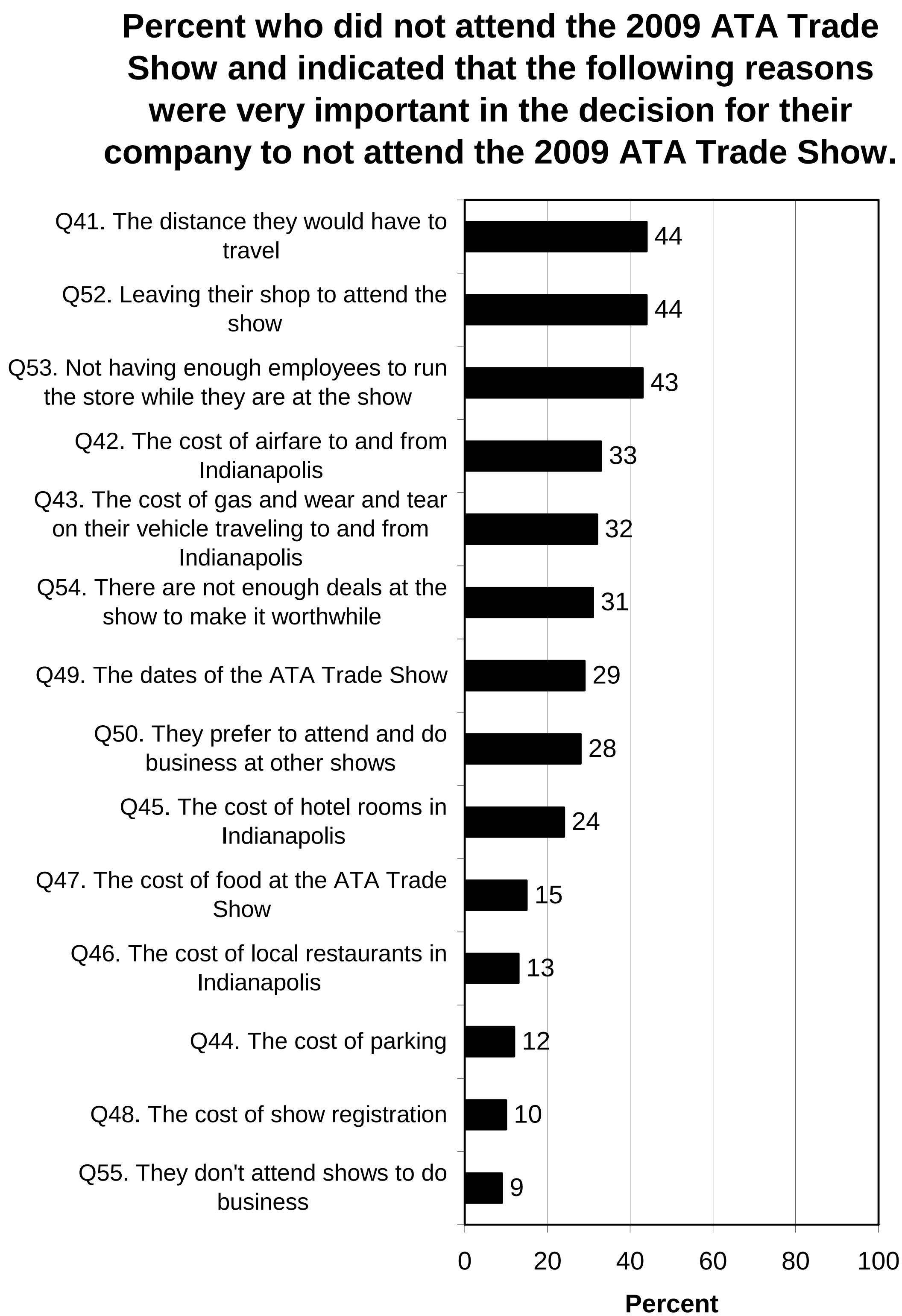


Retailers Survey

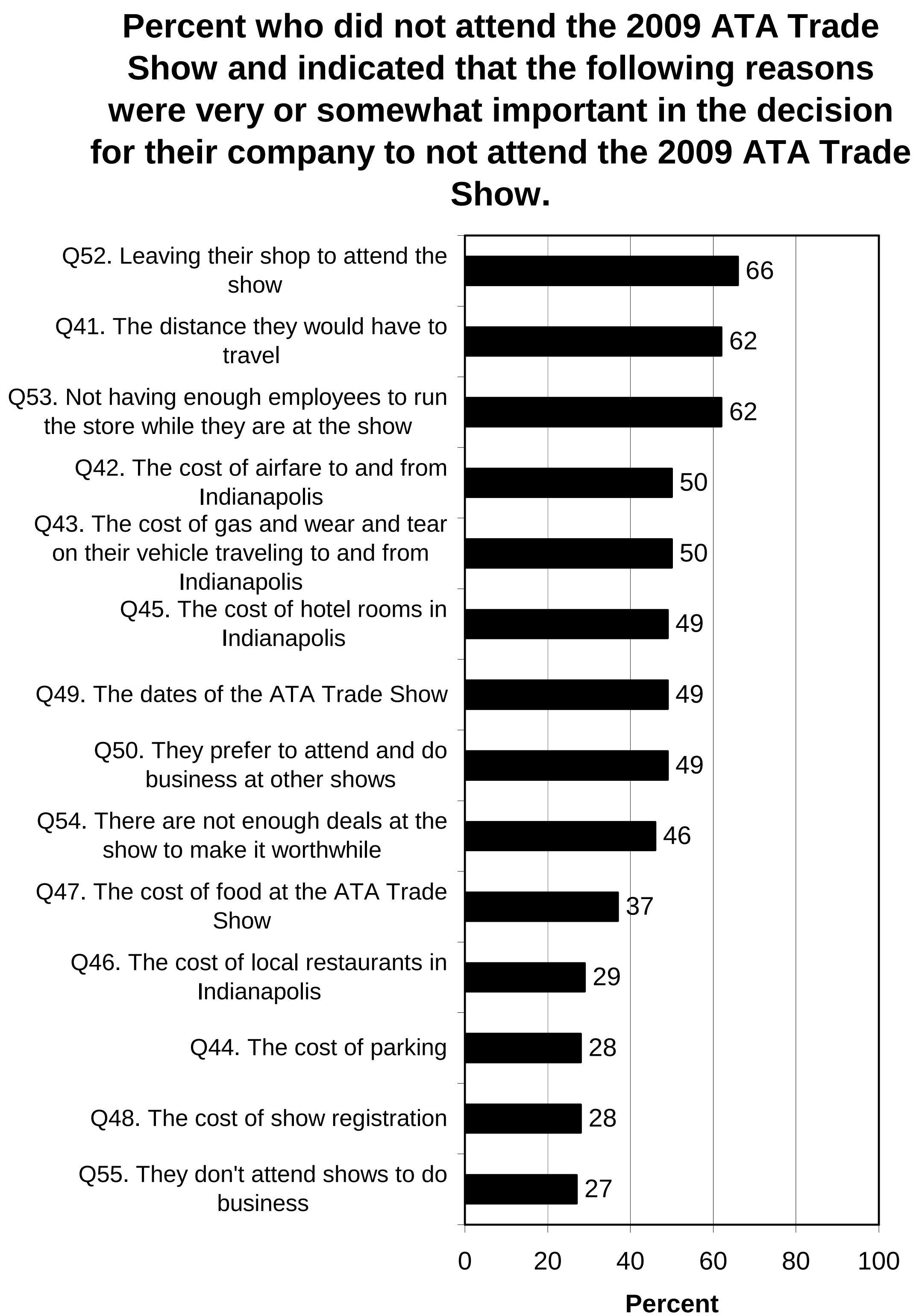
Q39. Why didn't your company attend the 2009 ATA Trade Show in Indianapolis? (Asked of those who did not attend the 2009 ATA Trade Show.)



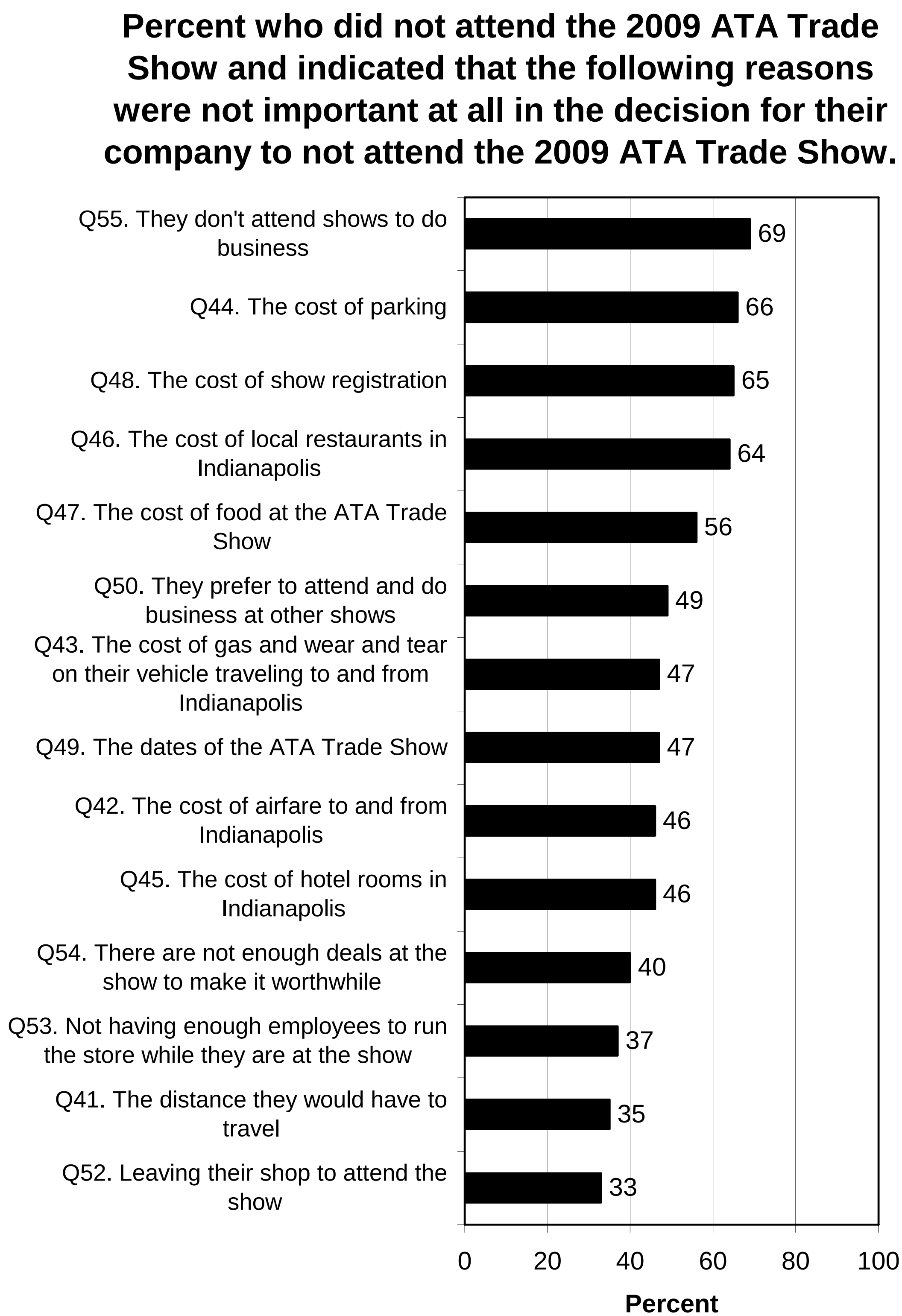
Retailers Survey



Retailers Survey

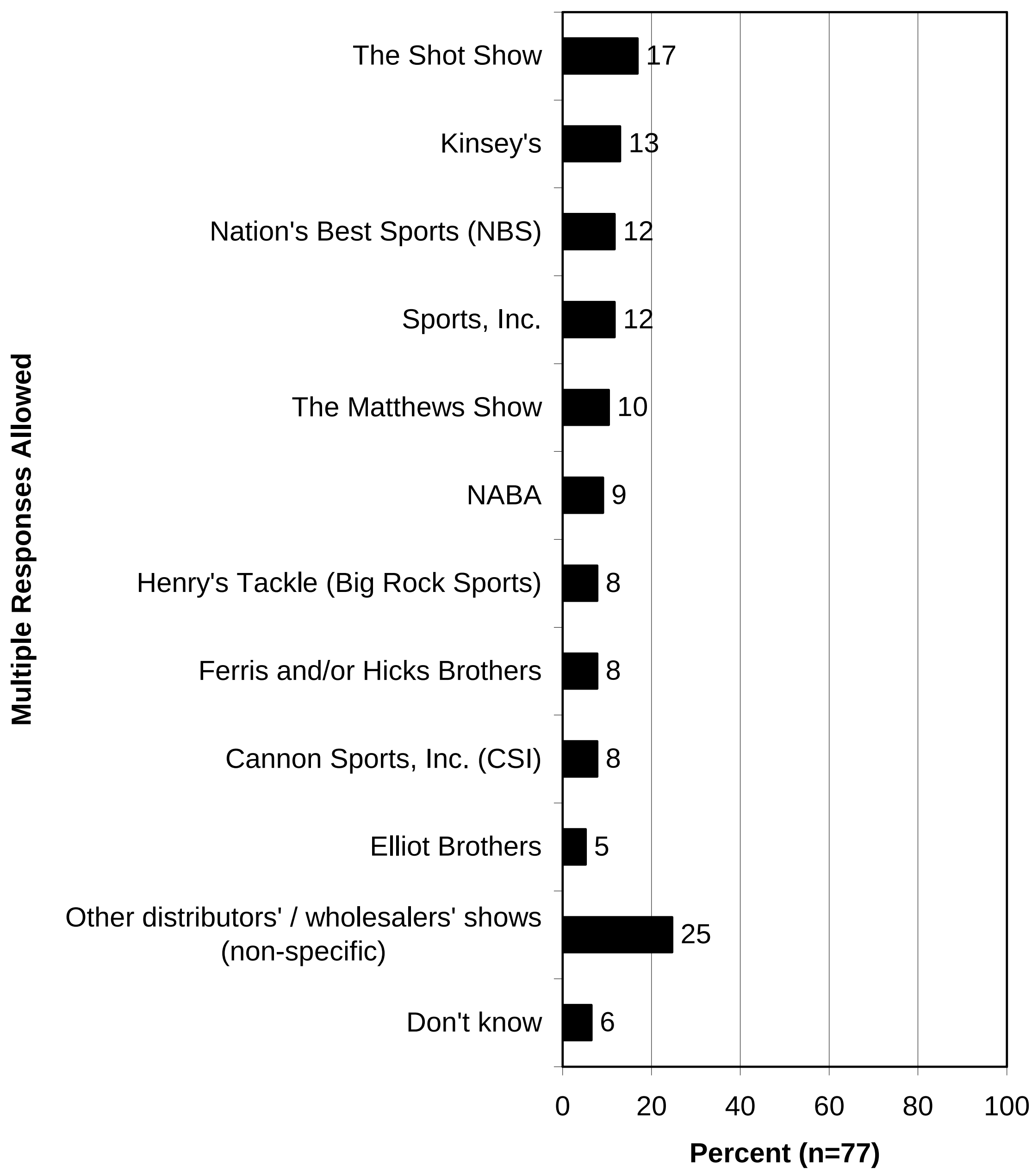


Retailers Survey



Retailers Survey

Q51. What are the other shows that you prefer to attend? (Asked of those who did not attend the 2009 ATA Trade Show and who prefer to attend and do business at other shows.)

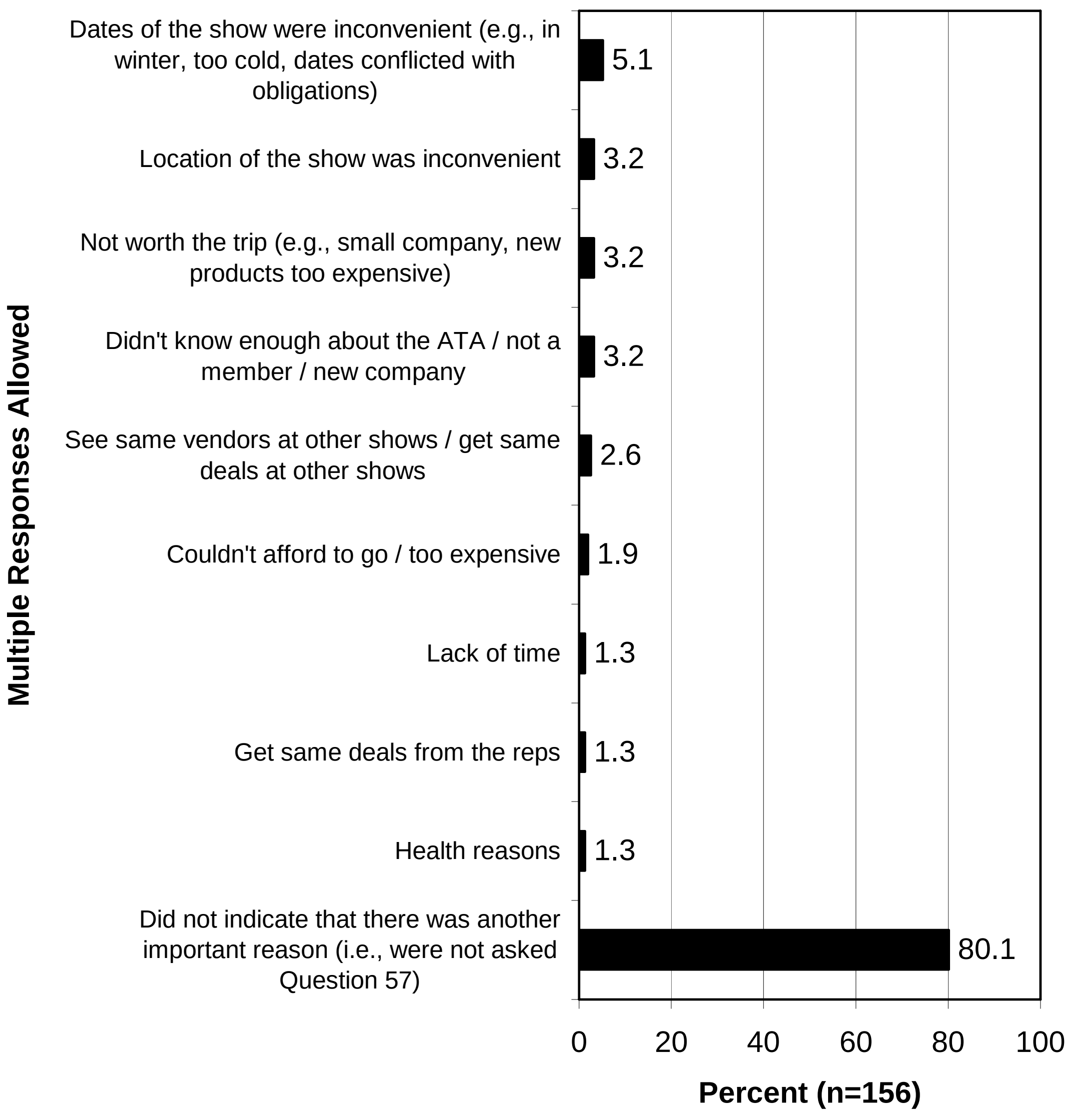


Retailers Survey

Q56. Are there any other reasons that were important in the decision for your company to *not* attend the 2009 ATA Trade Show?

Q57. What are the other reasons?

(Among those who did not attend the 2009 ATA Trade Show.)



THE 2010 TRADE SHOW IN COLUMBUS

- The survey asked all retailers nine questions about the importance of various aspects of the Trade Show itself in their decision on whether to attend the 2010 Trade Show in Columbus, again using the *very* important, *somewhat* important, or *not at all* important answer set. The results were ranked.
  - Four aspects are markedly of more importance in decision-making: to see and learn about new products (78% said this would be *very* important in their decision on whether to attend), to talk with key manufacturers, distributors, and sales reps (67%), to increase technical expertise and knowledge (66%), and to save money on buying products (62%).
  - At the bottom are the social- and entertainment-related reasons.
  - Following this series, retailers were asked if there were any other important aspects in their consideration of whether to attend the 2010 Trade Show. Among those who said other aspects were important, the most common answers relate to the location of the Trade Show, the dates of the Trade Show, expenses associated with attending, and seminar offerings.

- The survey asked exhibitors 22 questions about the importance of various aspects of the 2010 Trade Show in making their decision whether to exhibit at the 2010 Trade Show.
  - Similar to the results regarding why they exhibited at the 2009 Trade Show, seven reasons are markedly more important than the others in their decision on whether to exhibit at the 2010 Trade Show: to meet with retailers or buyers (86% said this reason will be *very* important in their company's decision on whether to exhibit at the 2010 Trade Show), to meet *new* retailers or buyers (85%), to benefit from the large number of attendees in general on the Trade Show floor (79%), to show their entire product line (78%), to introduce new products (76%), to market their company, brands, and products (76%), and to feature important products (74%).
  - Following this series, exhibitors were asked if there were any other important aspects in their consideration of whether to exhibit at the 2010 Trade Show. Among those who said other aspects were important, the most common answers relate to the costs, location, or dates of the 2010 Trade Show.

- The survey asked retailers eleven questions about the importance of various factors in their decision on whether to attend the 2010 Trade Show. Note that these questions pertained to factors *outside* of the actual Trade Show, such as aspects of Columbus (a previous series had pertained to aspects of the Trade Show itself). These results were ranked.
  - The most important factors, ranked by the percentage saying *very* important, are having enough employees to run the store while they are at the show (36% say this is *very* important), the distance they have to travel (35%), and leaving their shop to attend the show (28%). Just below these are three cost-related items: cost of airfare to Columbus (27%), cost of gas and wear/tear on vehicles (24%), and cost of hotel rooms in Columbus (24%).
  - Following this series, retailers were asked if there were any other important factors in their consideration of whether to attend the 2010 Trade Show. Among those who said other factors were important, the most common answers relate to the dates of the Trade Show, expenses associated with attending, and the location of the Trade Show.

- Similar to the above series, the survey asked exhibitors eleven questions about the importance of various factors in their decision on whether to exhibit at the 2010 Trade Show. Again, the results were ranked.
  - Two factors stand out markedly above the others as being *very* important: how well their company does financially in 2009 (56% said this is a *very* important factor) and the cost of booth space (50%). Two additional factors are in a second tier: the dates of the 2010 Trade Show (29%) and the cost of transportation for their booth and people (25%).
  - Following this series, exhibitors were asked if there were any other important factors in their consideration of whether to exhibit at the 2010 Trade Show. Topping the list among those who named another factor are costs, expected turnout/participation, and timing/dates.

- A question that pertains to motivations for attending the 2010 Trade Show asked retailers to indicate the percentage of their annual retail product inventory for sales that they typically order at the ATA Trade Show. A large majority (71%) gave an answer of 50 percent or less, including 14% who place no orders. Nonetheless, 22% say that they order more than half their inventory at the ATA Trade Show. For these latter retailers, an important motivation in attending the 2010 Trade Show is to fill inventory.

- Another question pertains to motivations for attending the 2010 Trade Show. The survey asked retailers to pick one statement out of five that best described the importance of the ATA Trade Show in helping them make buying decisions. The statements were in a scale from no importance ("I don't make *any* buying decisions at the ATA Trade Show") to great importance ("I have to attend the show to ensure that I make good buying decisions"). The most common response was in the middle of the scale ("I make some buying decisions at the show but many before and after"), with 39% giving that answer. Overall, the results form a classic bell curve with the peak in the middle.

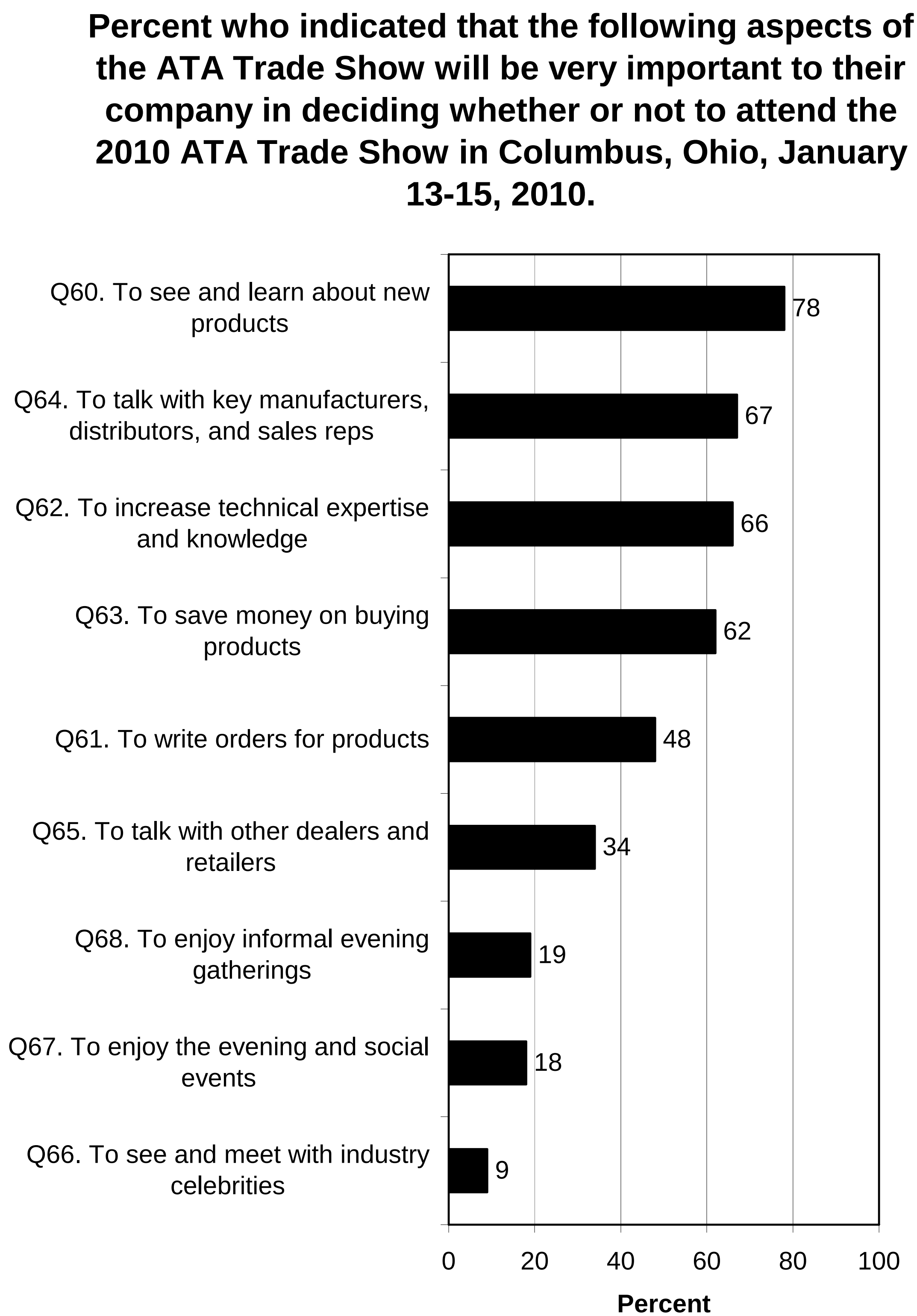
- In a question that has implications regarding constraints on exhibiting at the 2010 Trade Show, nearly half of exhibitors (49%) indicated that the cost of booth space for the 2010 Trade Show is too high.
  - In follow-up, those who said the cost was too high were asked to give the reasons that they say the cost is too high. Three reasons stand out: the economy being bad, that the ATA Trade Show compared unfavorably to other shows, and that not enough buyers attended the ATA Trade Show.

- Both surveys examined constraints to attending/exhibiting among those *not at all* likely to do so.
  - The survey asked those retailers who indicated that it was *not at all* likely that their company would attend the 2010 Trade Show to indicate the reasons why, in an open-ended question. Most commonly, the location/distance to travel was a reason, distantly followed by because they go to other shows, they do not have staff available/time constraints, or because of the dates of the 2010 Trade Show.
  - The survey asked those exhibitors who indicated that it was *not at all* likely that their company would exhibit at the 2010 Trade Show to indicate the reasons why, in an open-ended question. Only 7 respondents in total were asked this question (because only 7 indicated *not* being likely to exhibit at the 2010 Trade Show), so the results should be

examined with this low sample in mind. Three answers were given: they do not do enough business at the ATA Trade Shows, the travel distance, the poor economy.

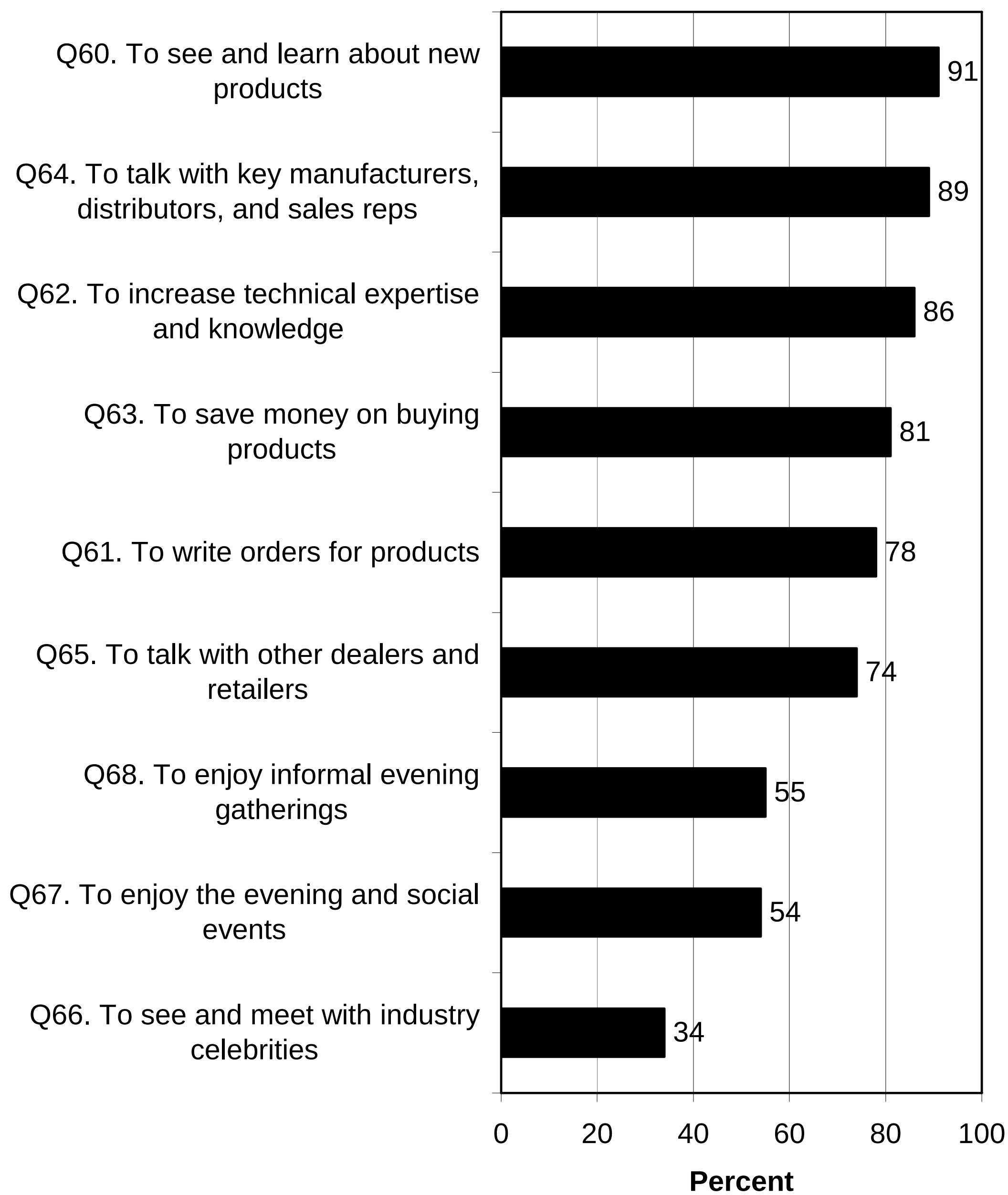
- Both surveys asked about things that might make respondents more likely to attend/exhibit at the 2010 Trade Show.
  - Those retailers who said that it was only *somewhat* likely or was *not at all* likely that their company would attend the 2010 Trade Show were asked to say what would make their company more likely to attend. Most commonly, answers related to the location or dates of the Trade Show, although the economy/having a good sales year also was mentioned.
  - Similar to the above question, those exhibitors who said that it was only *somewhat* likely or was *not at all* likely that their company would exhibit at the 2010 Trade Show were asked to say what would make their company more likely to do so. Most commonly, answers related to lower costs associated with exhibiting, the economy in general, the location, more robust attendance, and different dates.

Retailers Survey

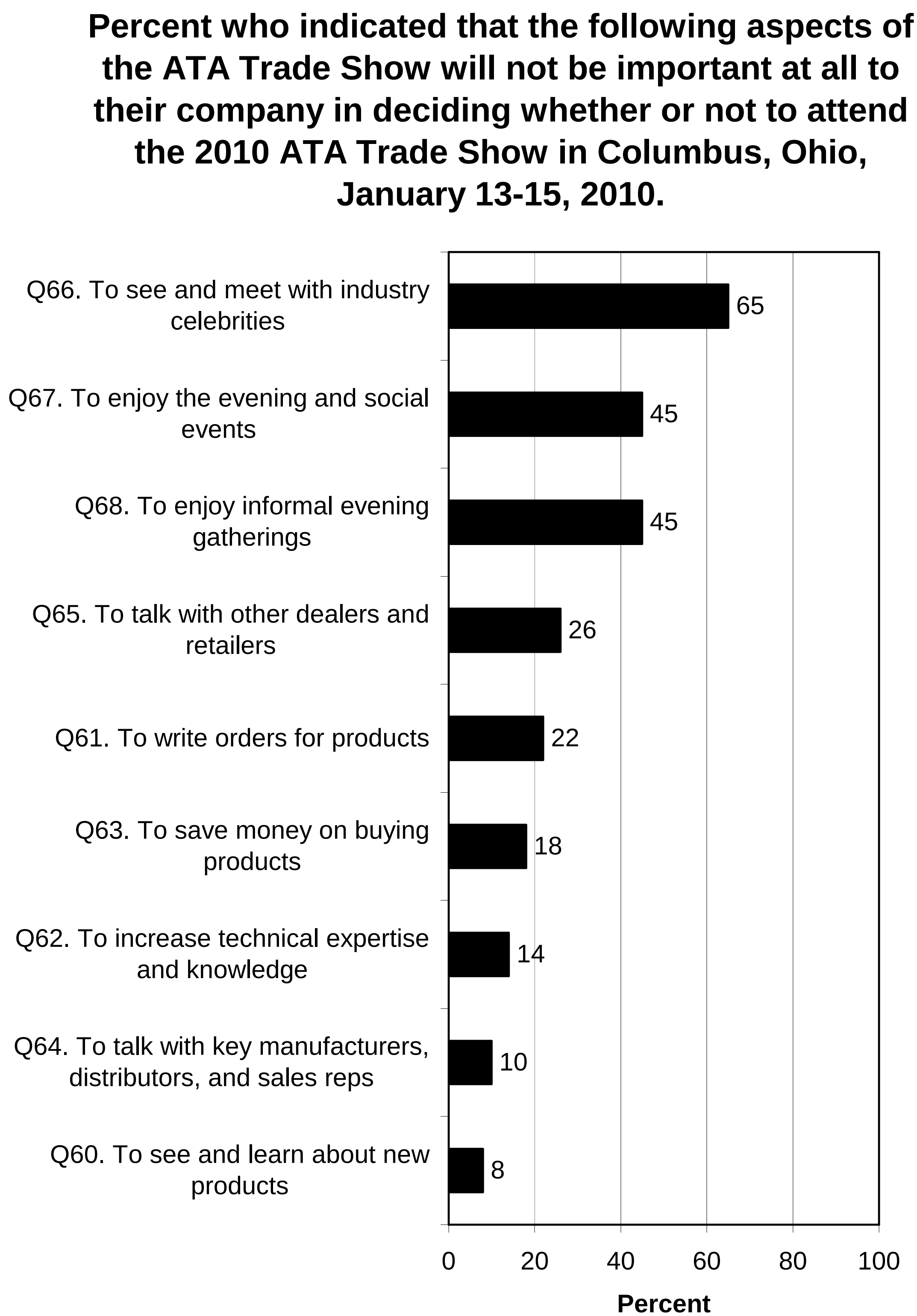


Retailers Survey

Percent who indicated that the following aspects of the ATA Trade Show will be very or somewhat important to their company in deciding whether or not to attend the 2010 ATA Trade Show in Columbus, Ohio, January 13-15, 2010.



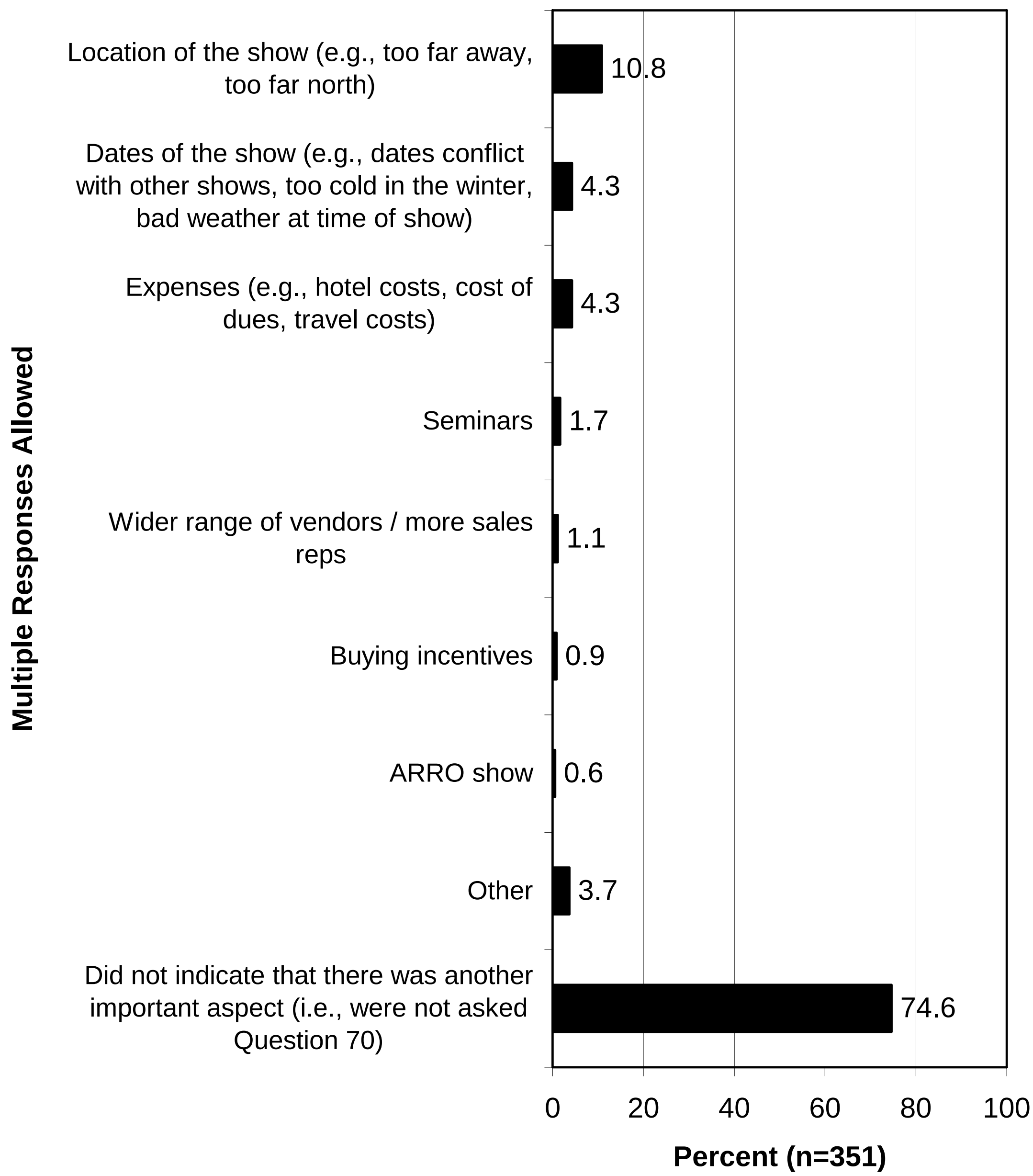
Retailers Survey



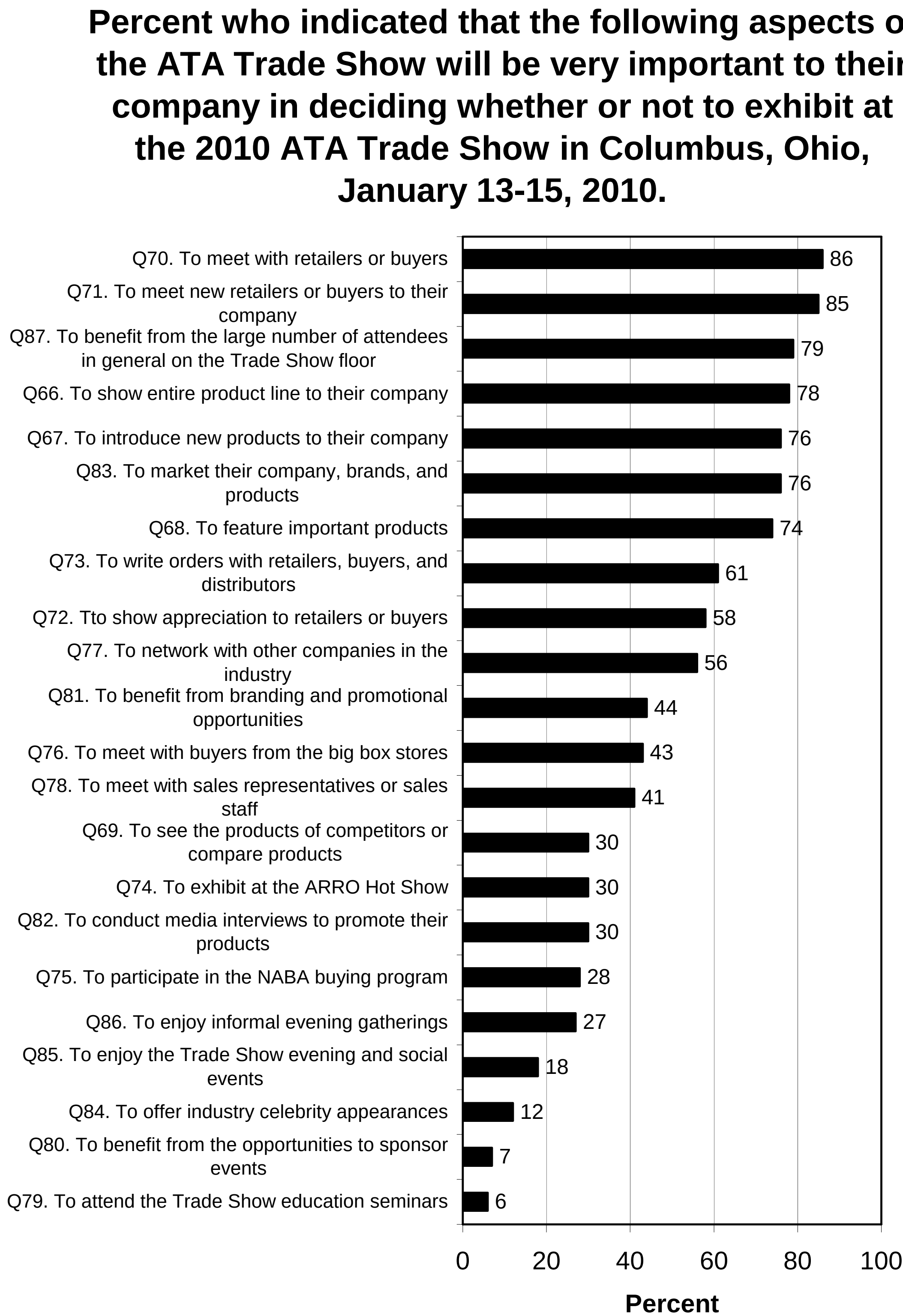
Retailers Survey

Q69. Are there any other aspects of the ATA Trade Show that will be important to your company in deciding whether or not to attend the 2010 ATA Trade Show?

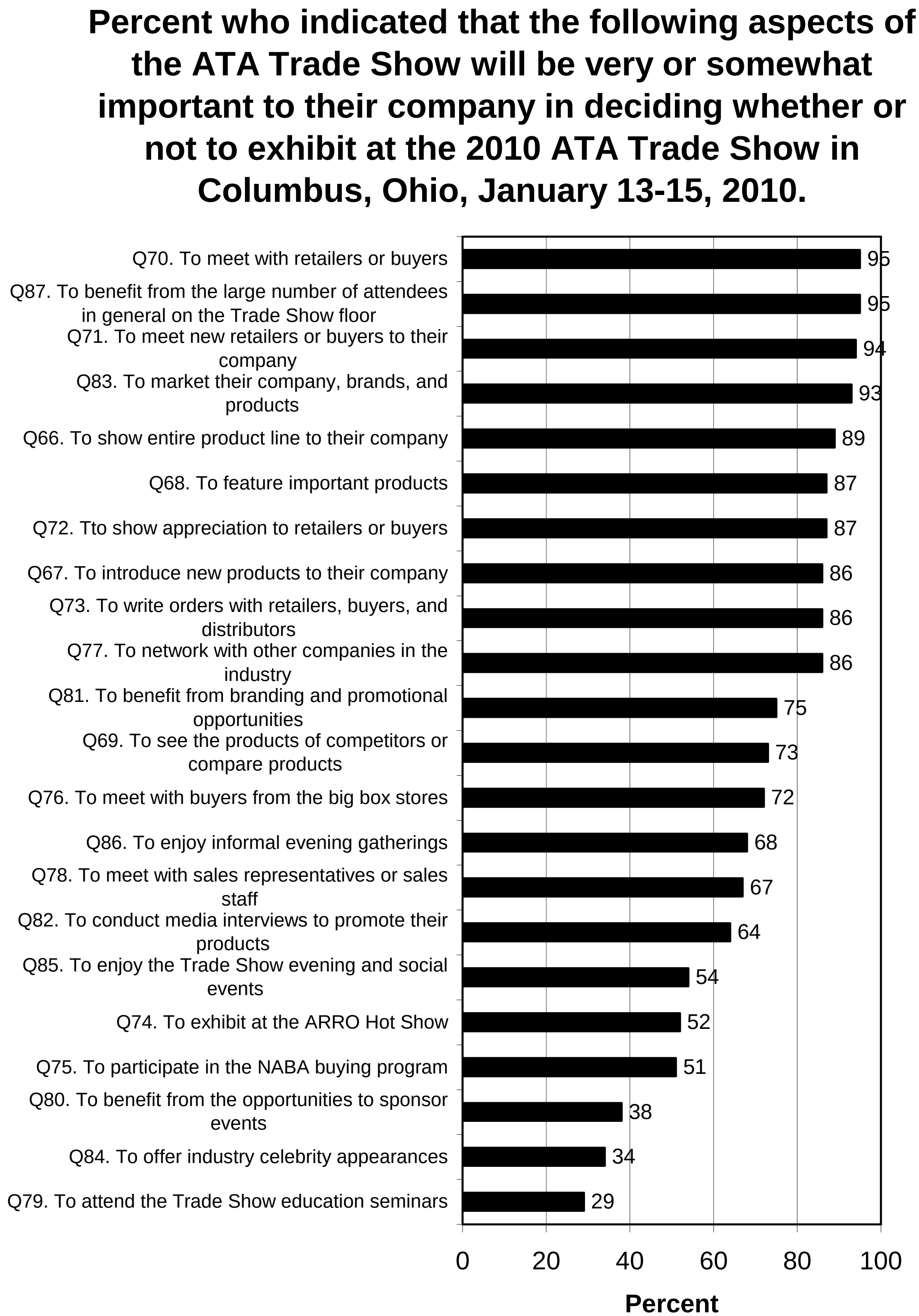
Q70. What are the other aspects?



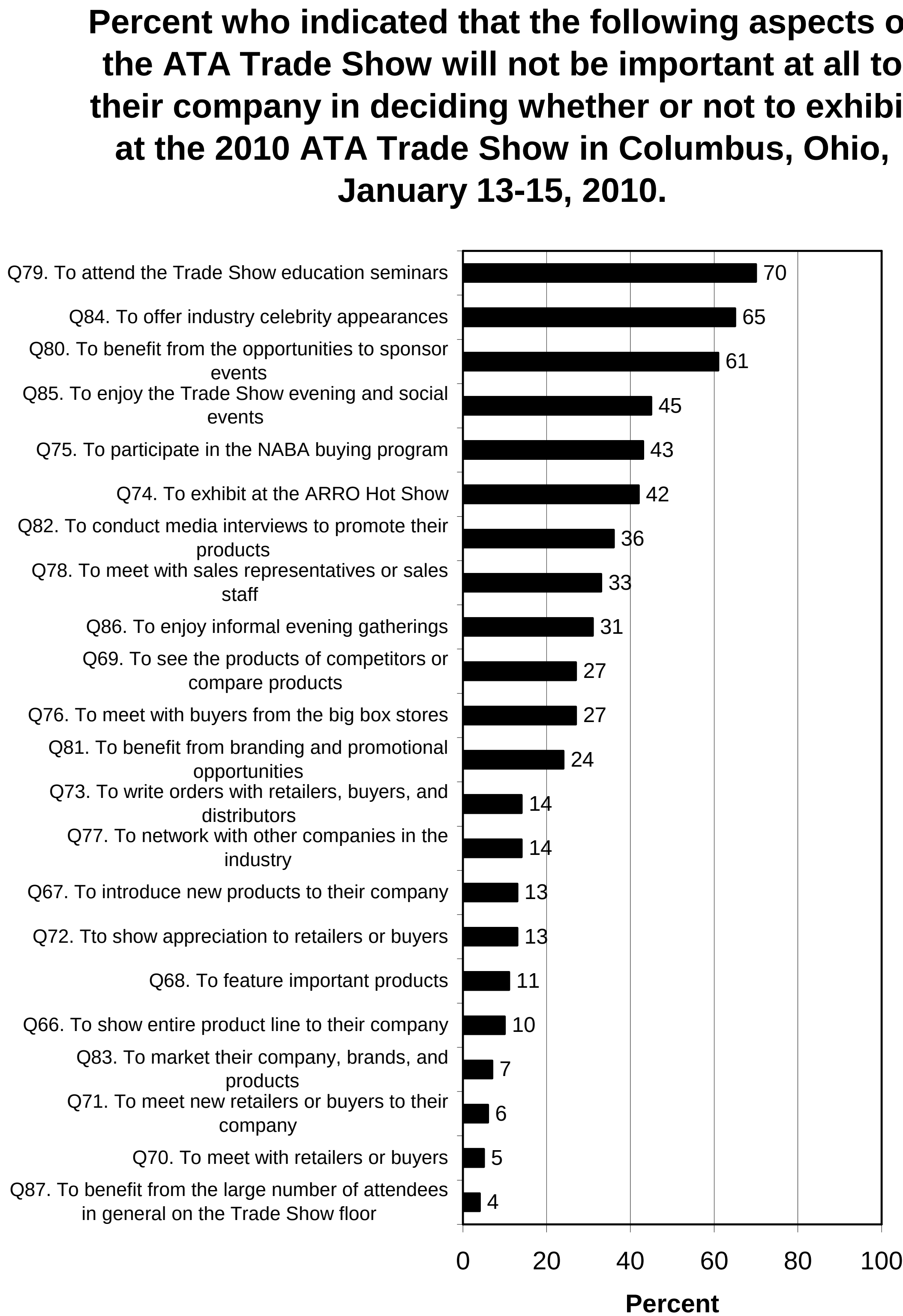
Exhibitors Survey



Exhibitors Survey



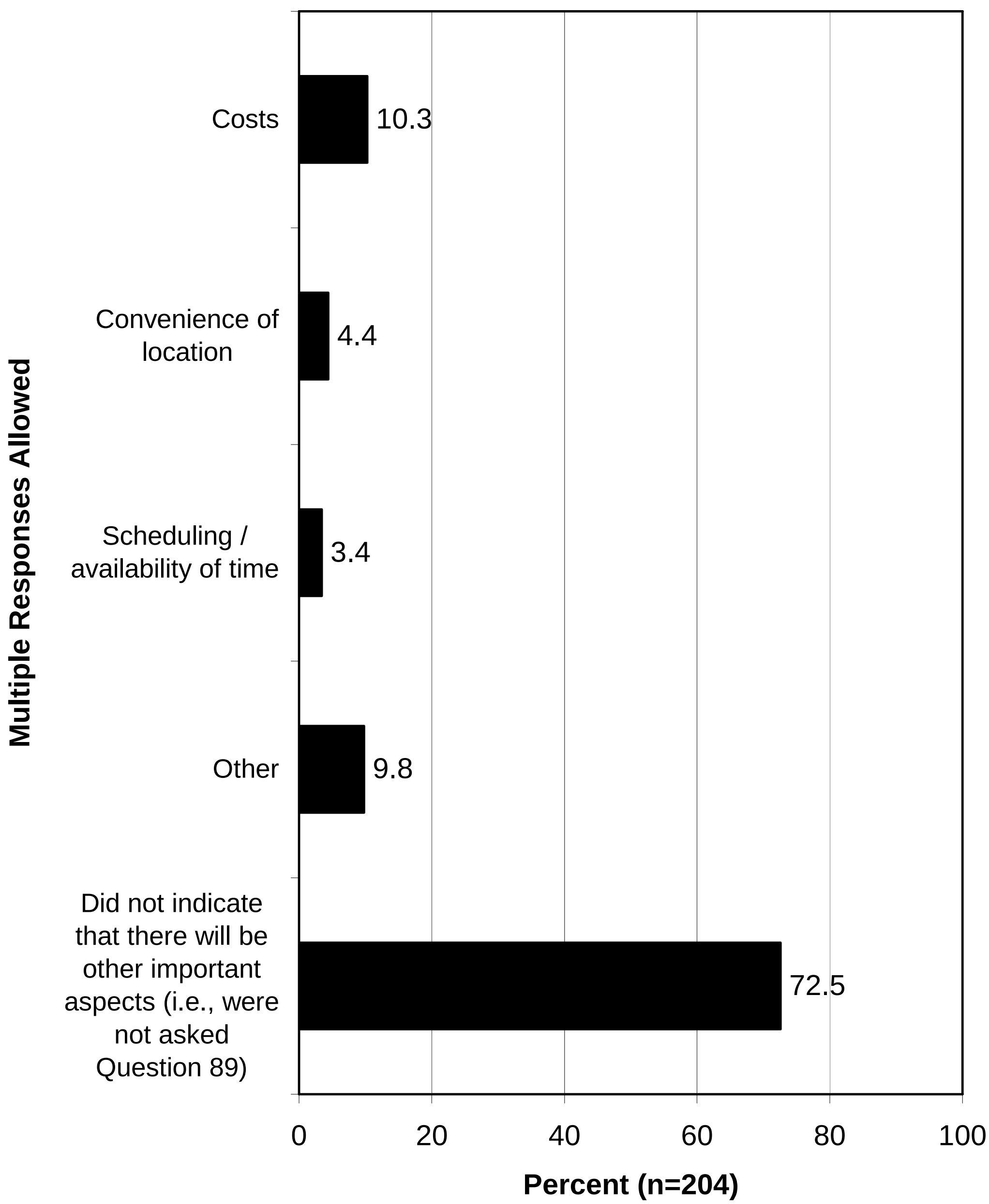
Exhibitors Survey



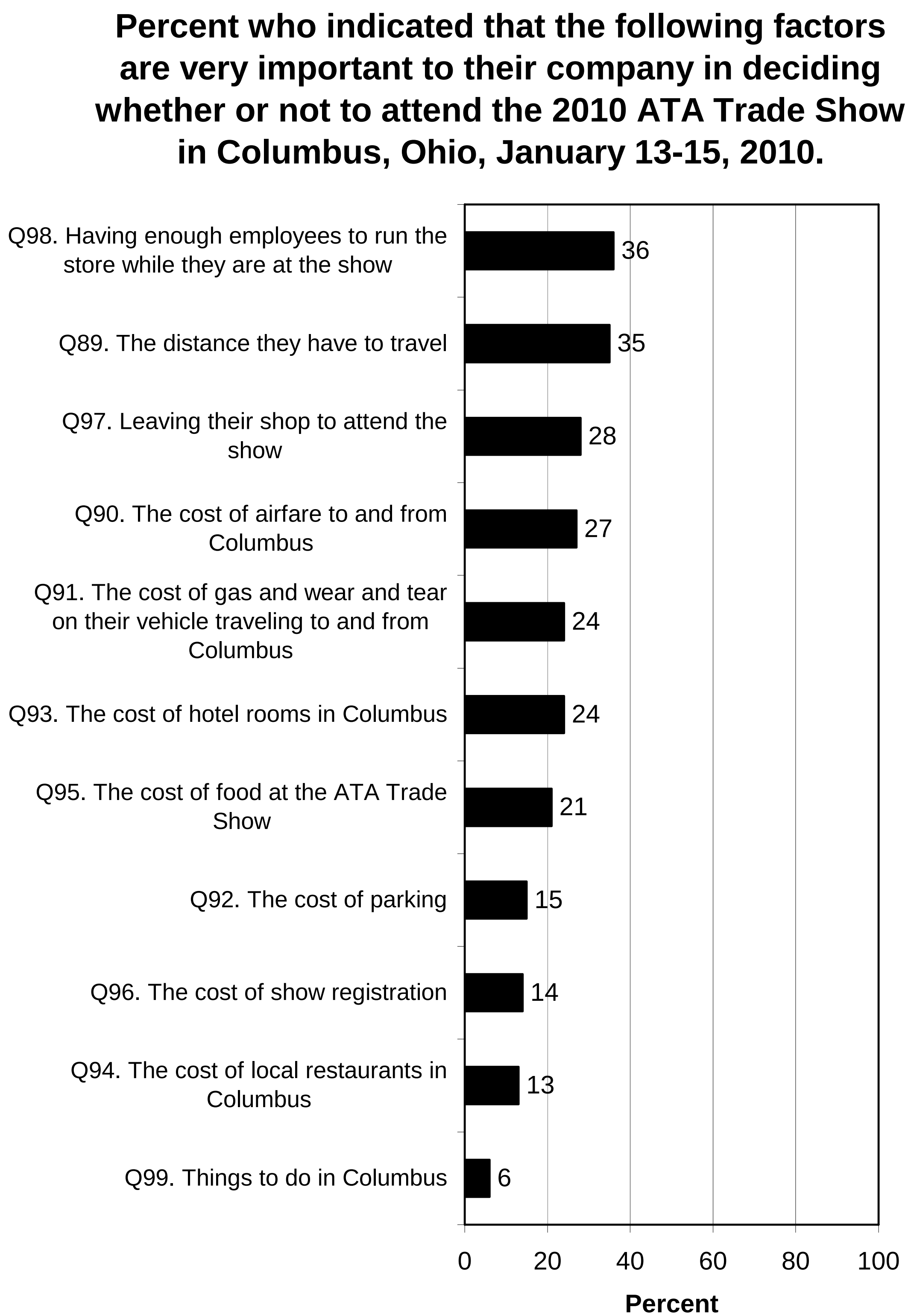
Exhibitors Survey

Q88. Are there any other aspects of the ATA Trade Show that will be important to your company in deciding whether or not to exhibit at the 2010 ATA Trade Show?

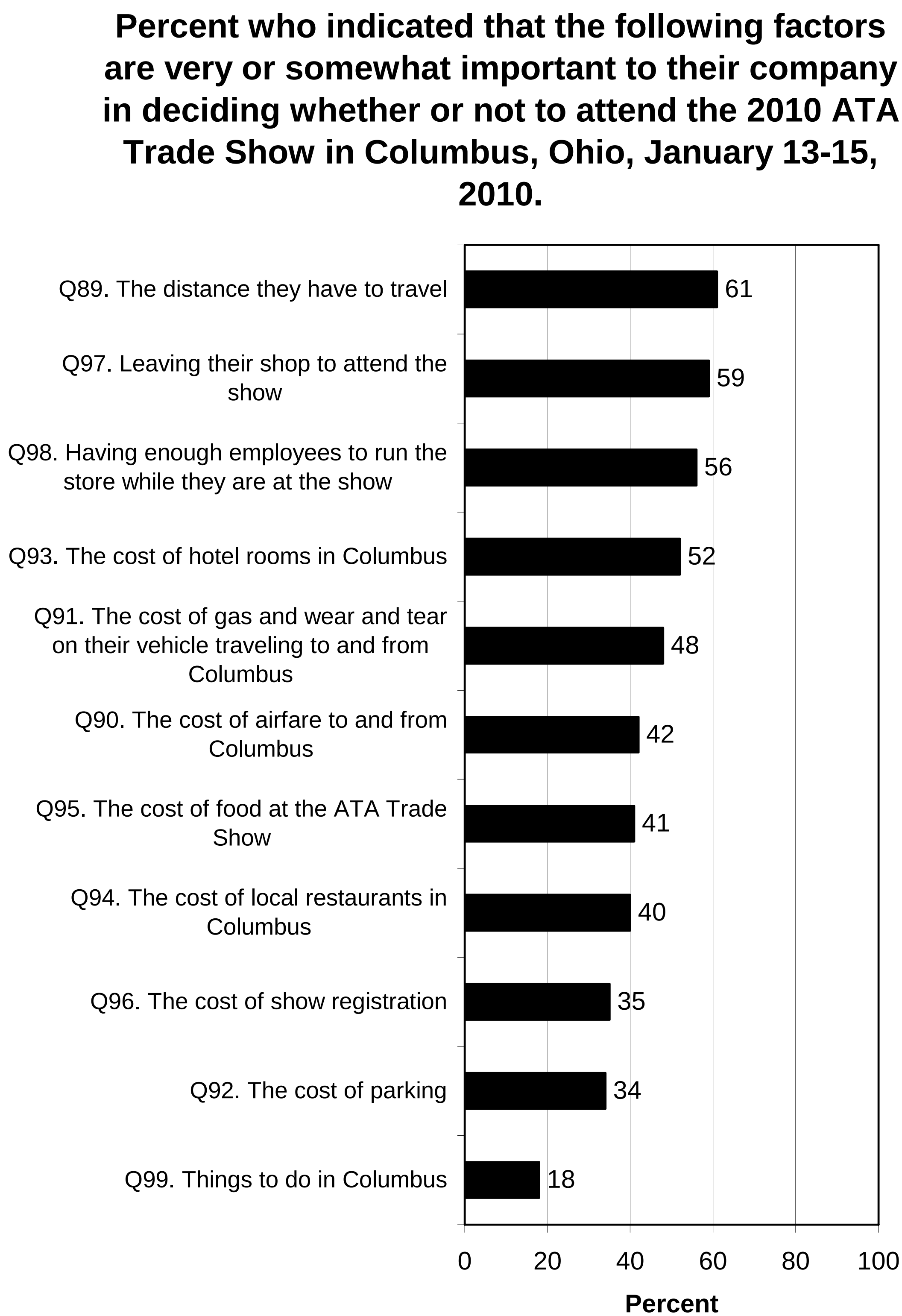
Q89. What are the other aspects?



Retailers Survey

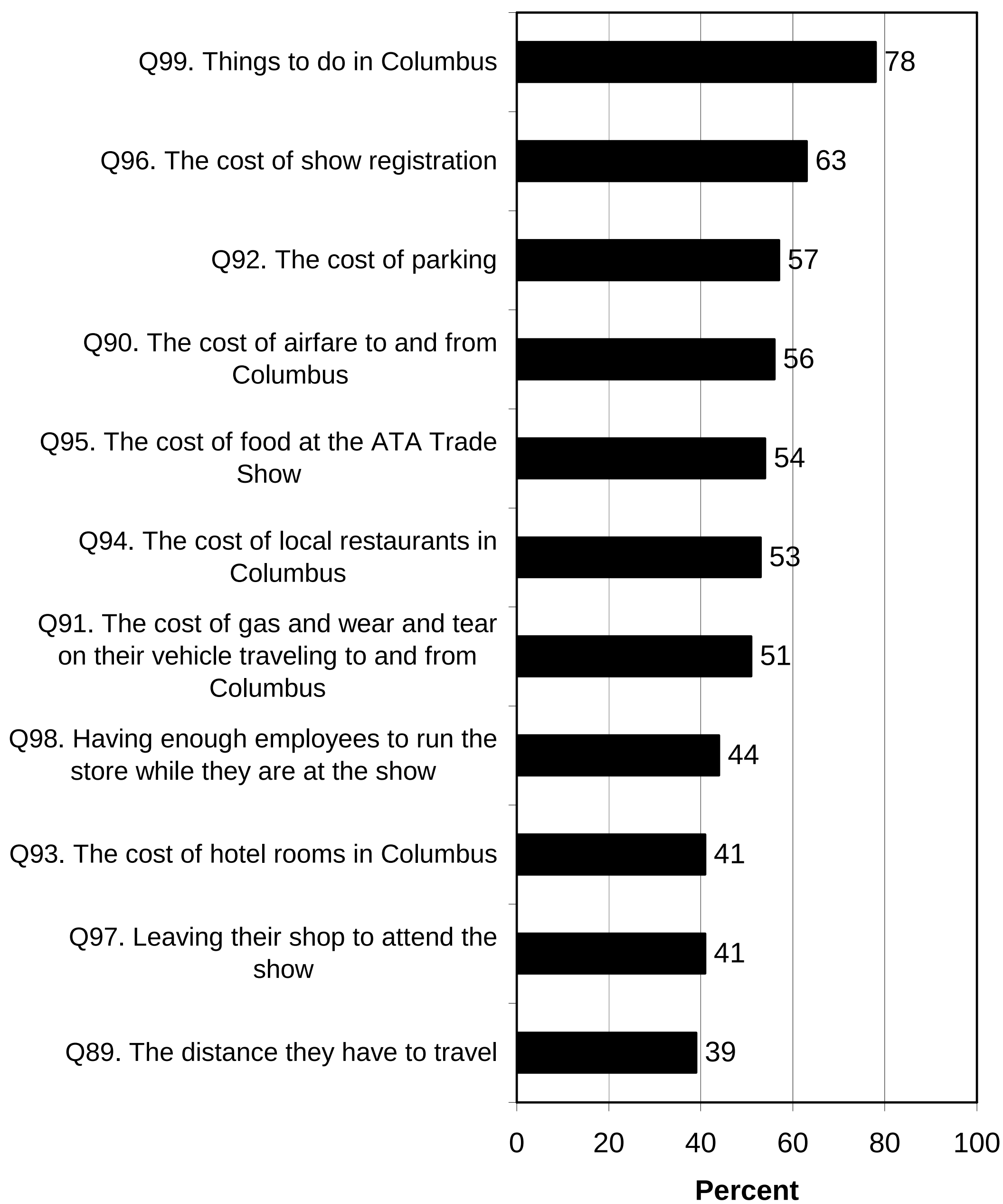


Retailers Survey



Retailers Survey

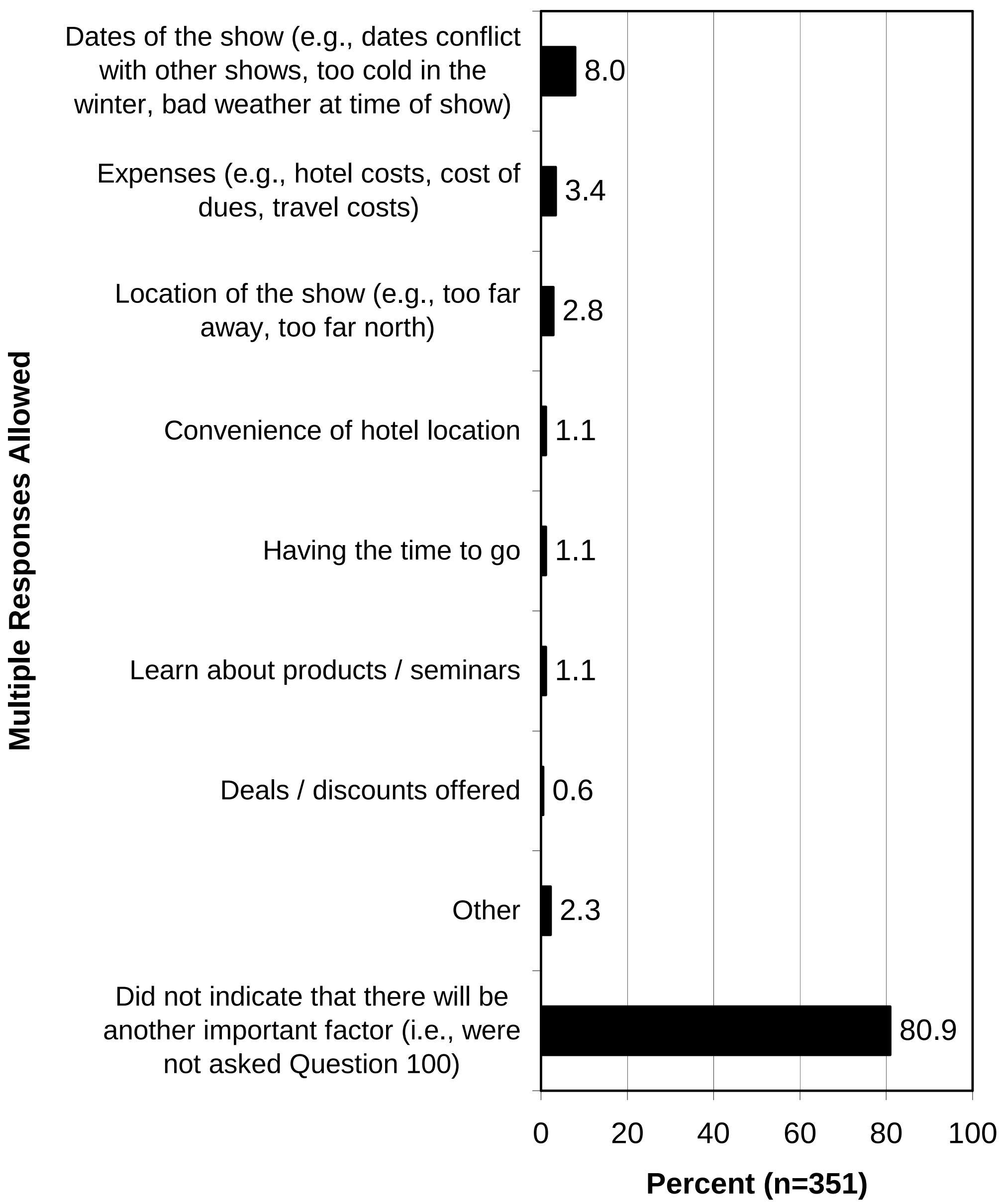
Percent who indicated that the following factors are not important at all to their company in deciding whether or not to attend the 2010 ATA Trade Show in Columbus, Ohio, January 13-15, 2010.



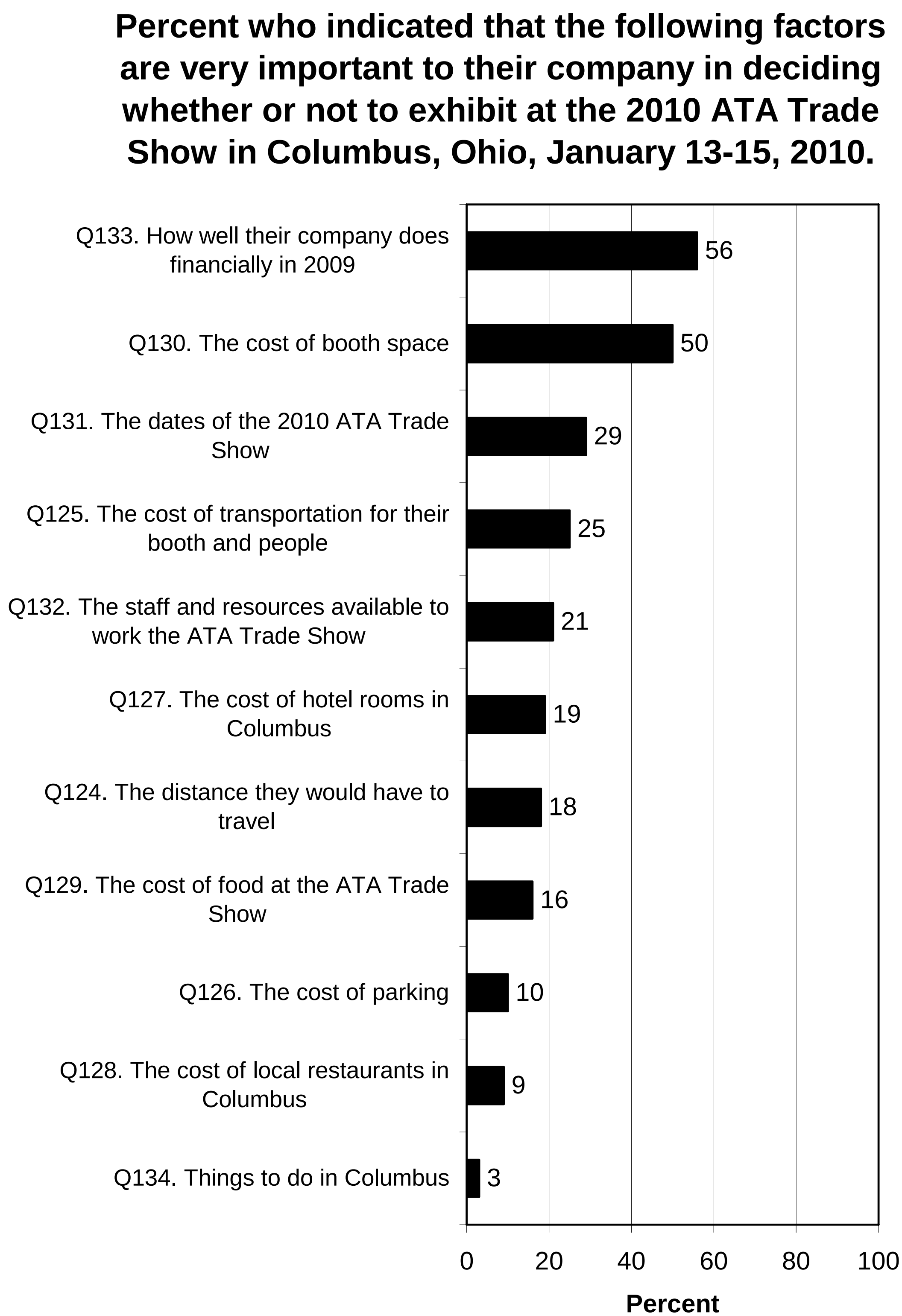
Retailers Survey

Q100. Are there any other factors that will be important to your company in deciding whether or not to attend the 2010 ATA Trade Show?

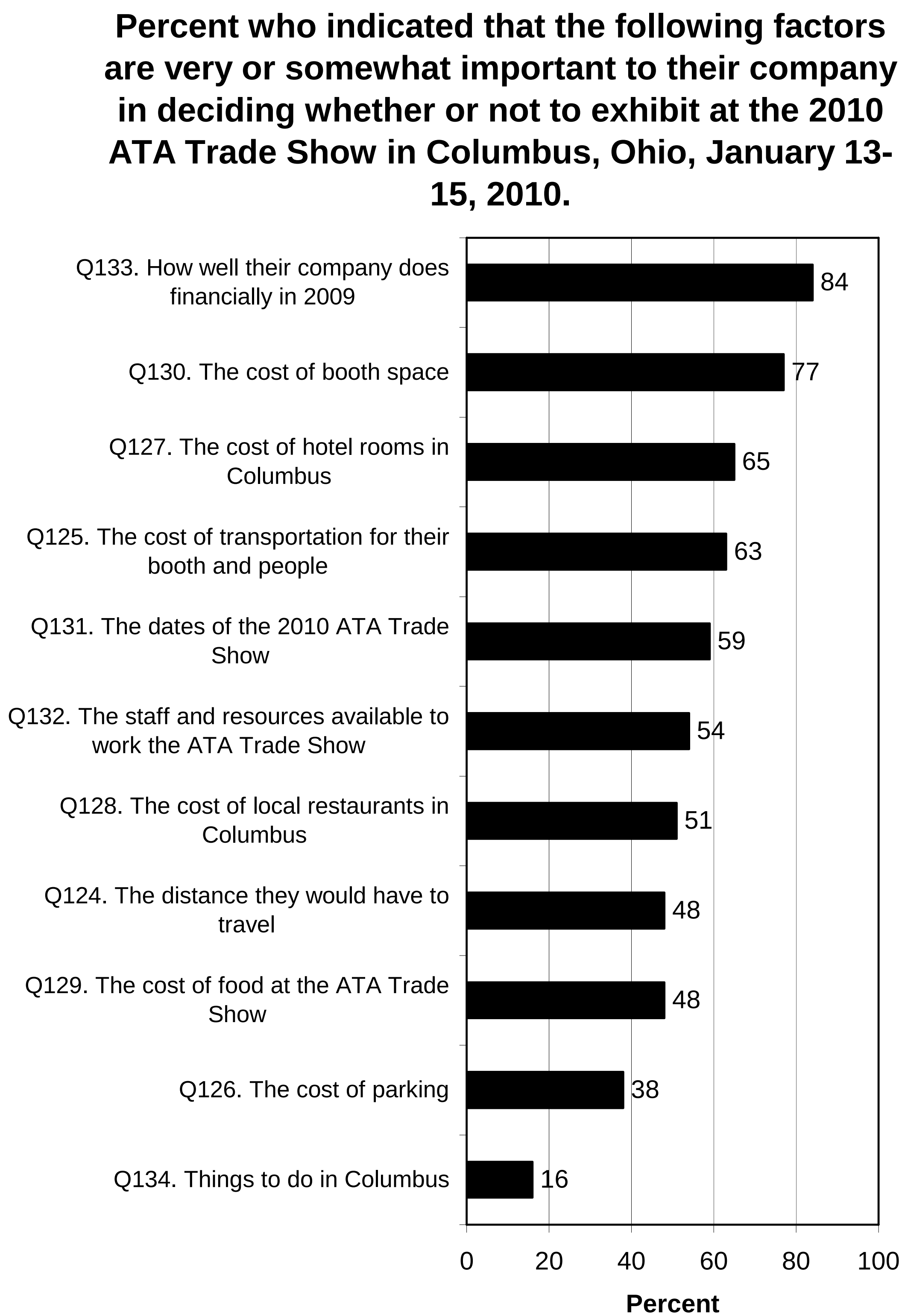
Q101. What are the other factors?



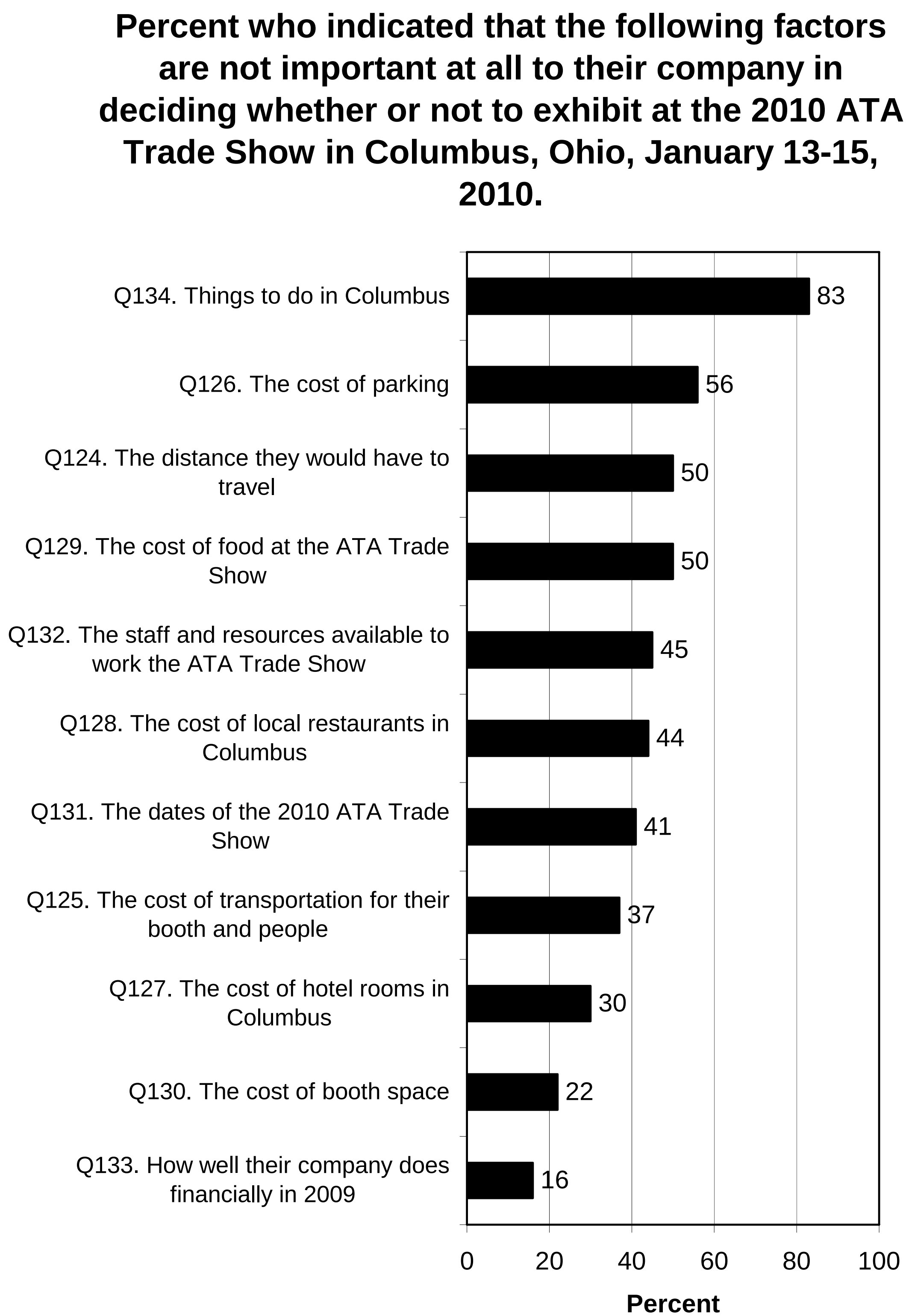
Exhibitors Survey



Exhibitors Survey



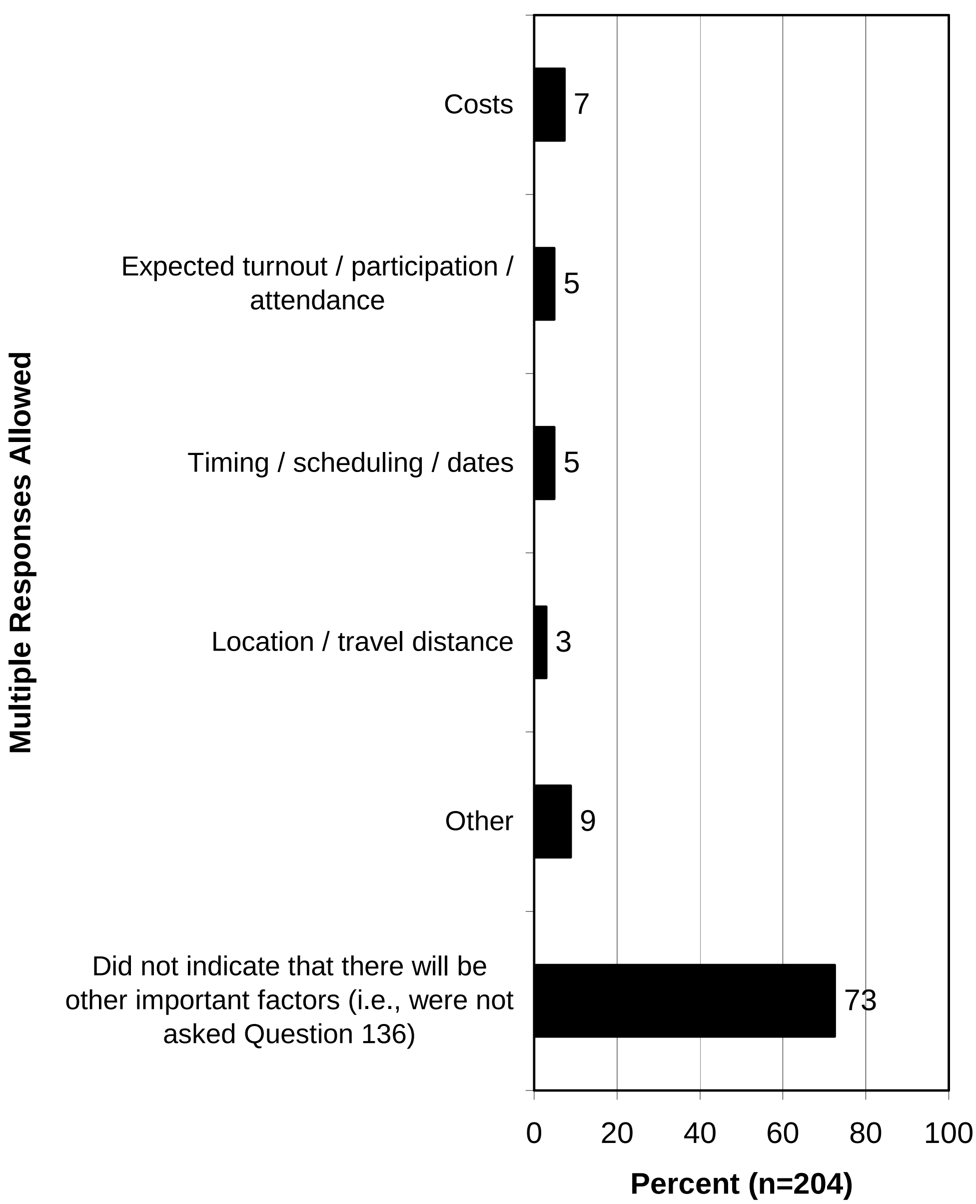
Exhibitors Survey



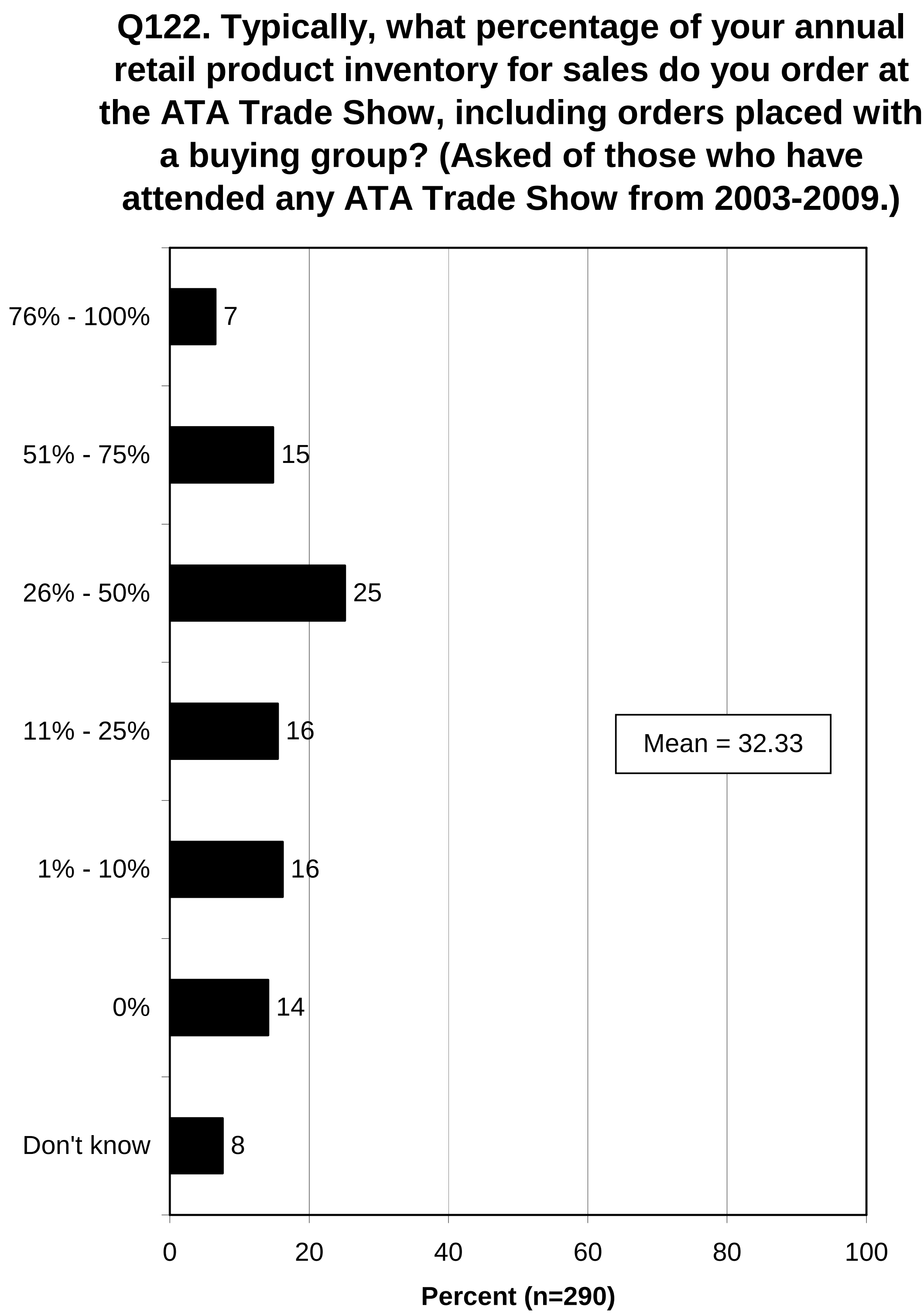
Exhibitors Survey

Q135. Are there any other factors that will be important to your company in deciding whether or not to exhibit at the 2010 ATA Trade Show?

Q136. What are the other factors?

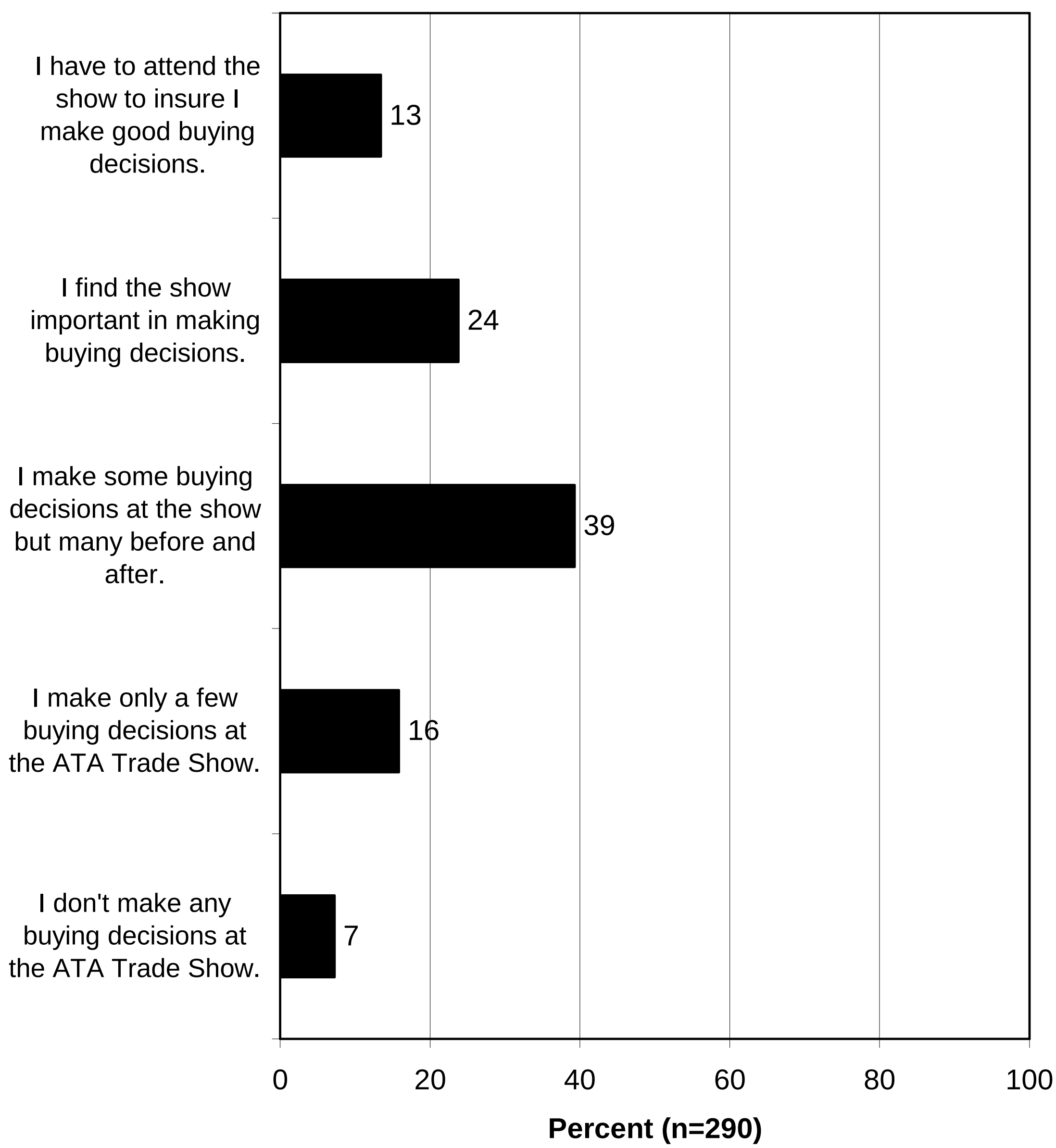


Retailers Survey



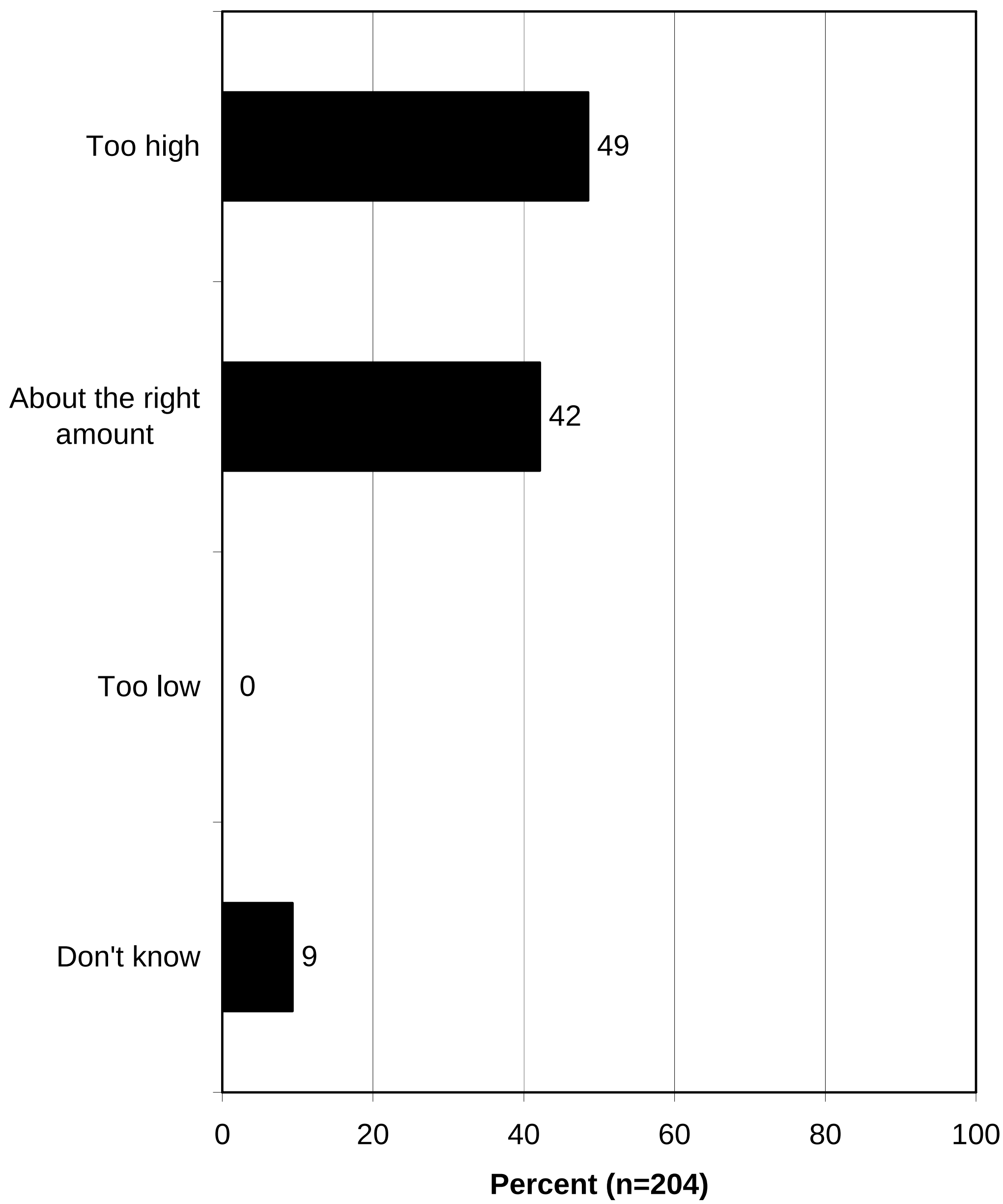
Retailers Survey

Q125. Which of the following statements best describes the importance of the ATA Trade Show in helping you make your product buying decisions for the coming year? (Asked of those who have attended any ATA Trade Show from 2003-2009.)

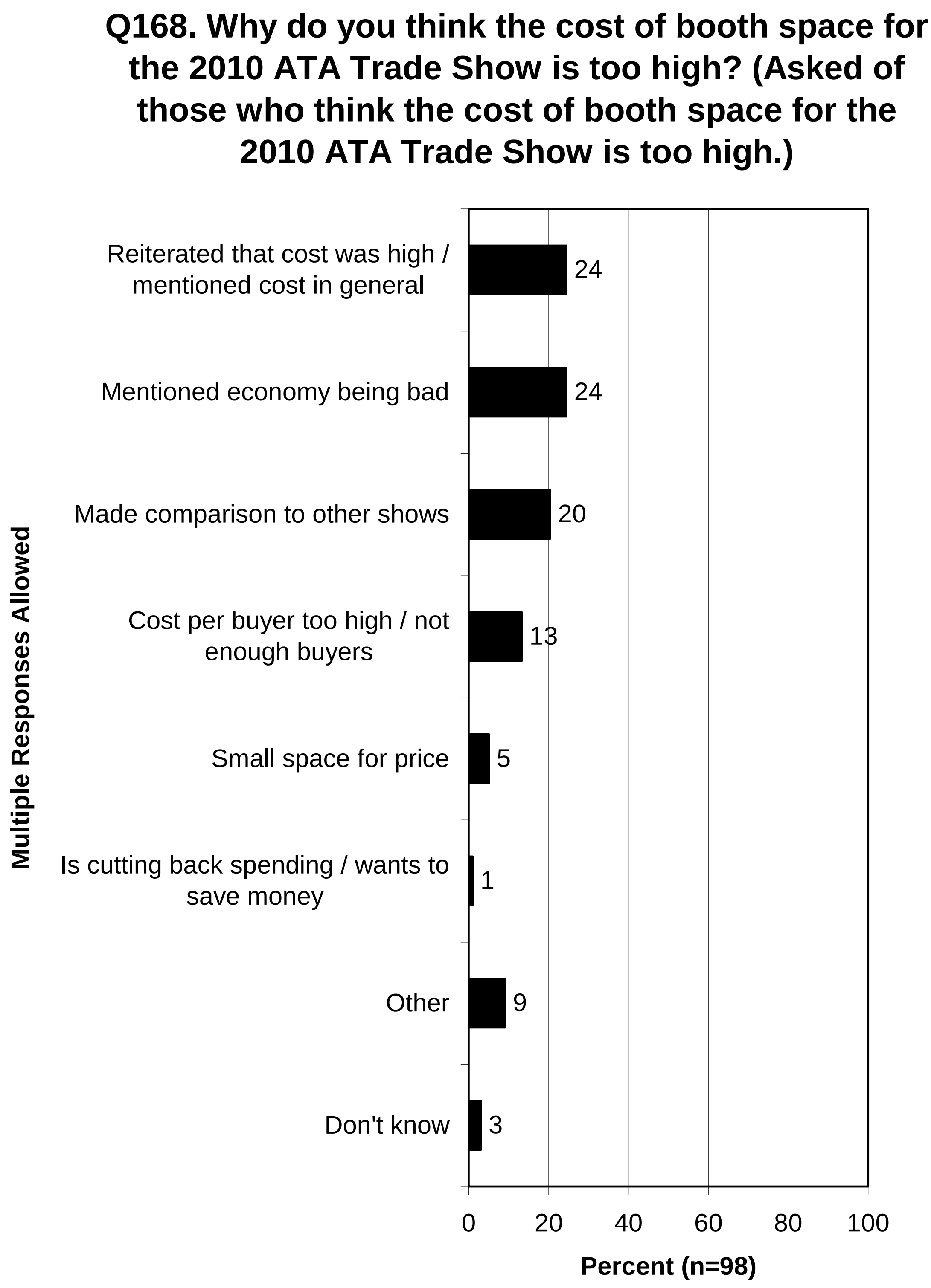


Exhibitors Survey

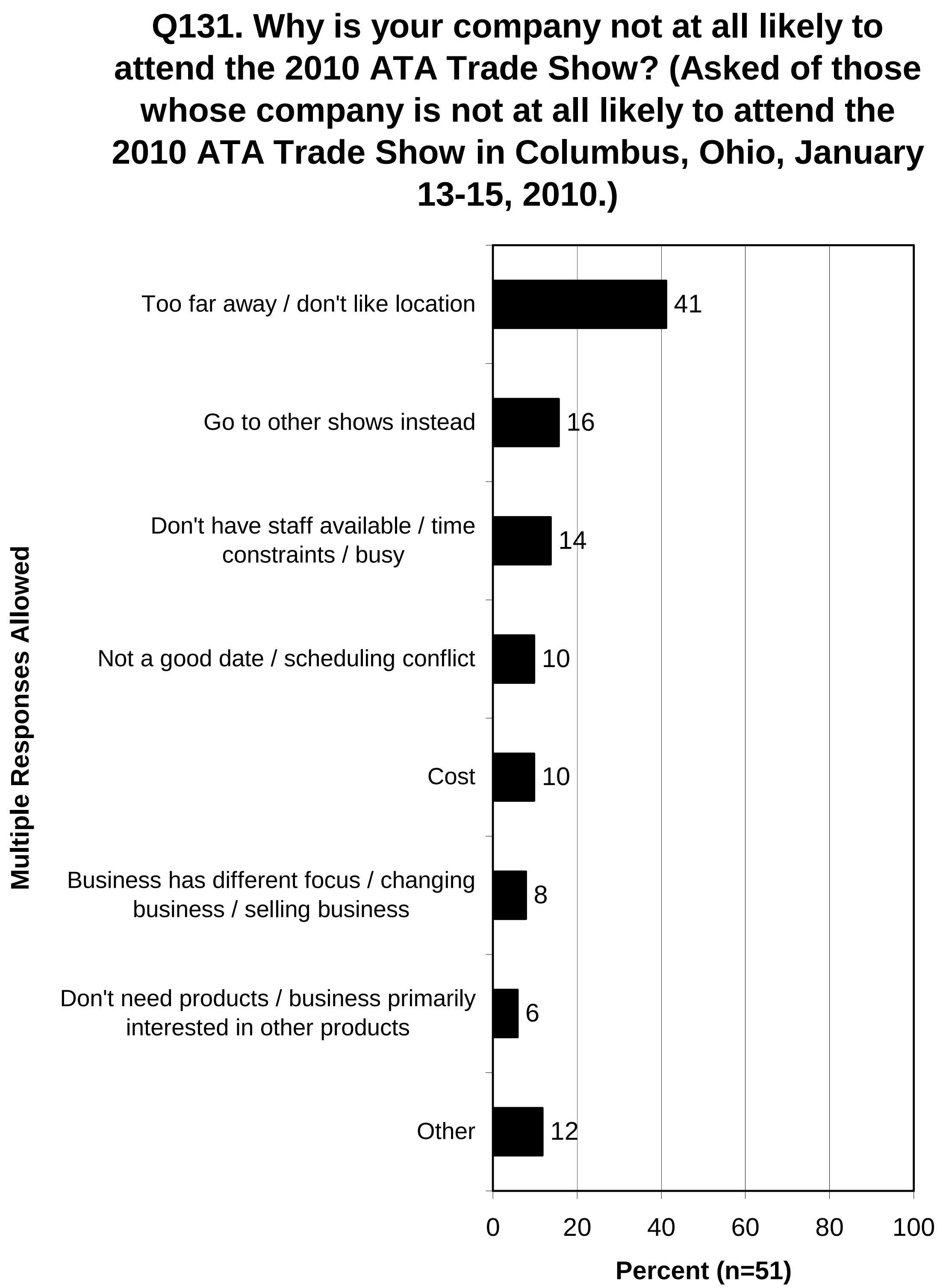
Q167. The cost of booth space for the 2010 ATA Trade Show is $18 per square foot for Regular members. In your opinion, is the cost of booth space too high, about the right amount, or too low?



Exhibitors Survey

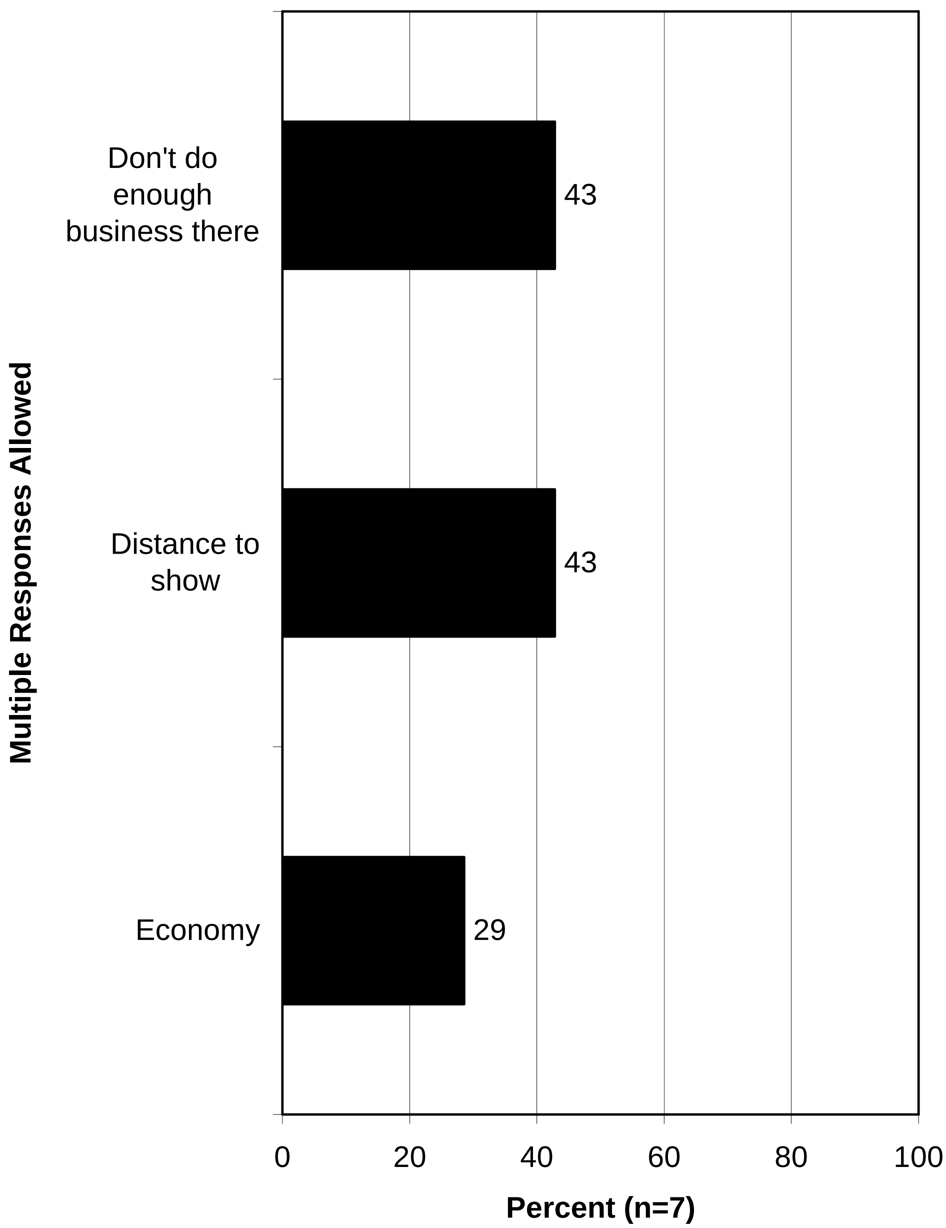


Retailers Survey

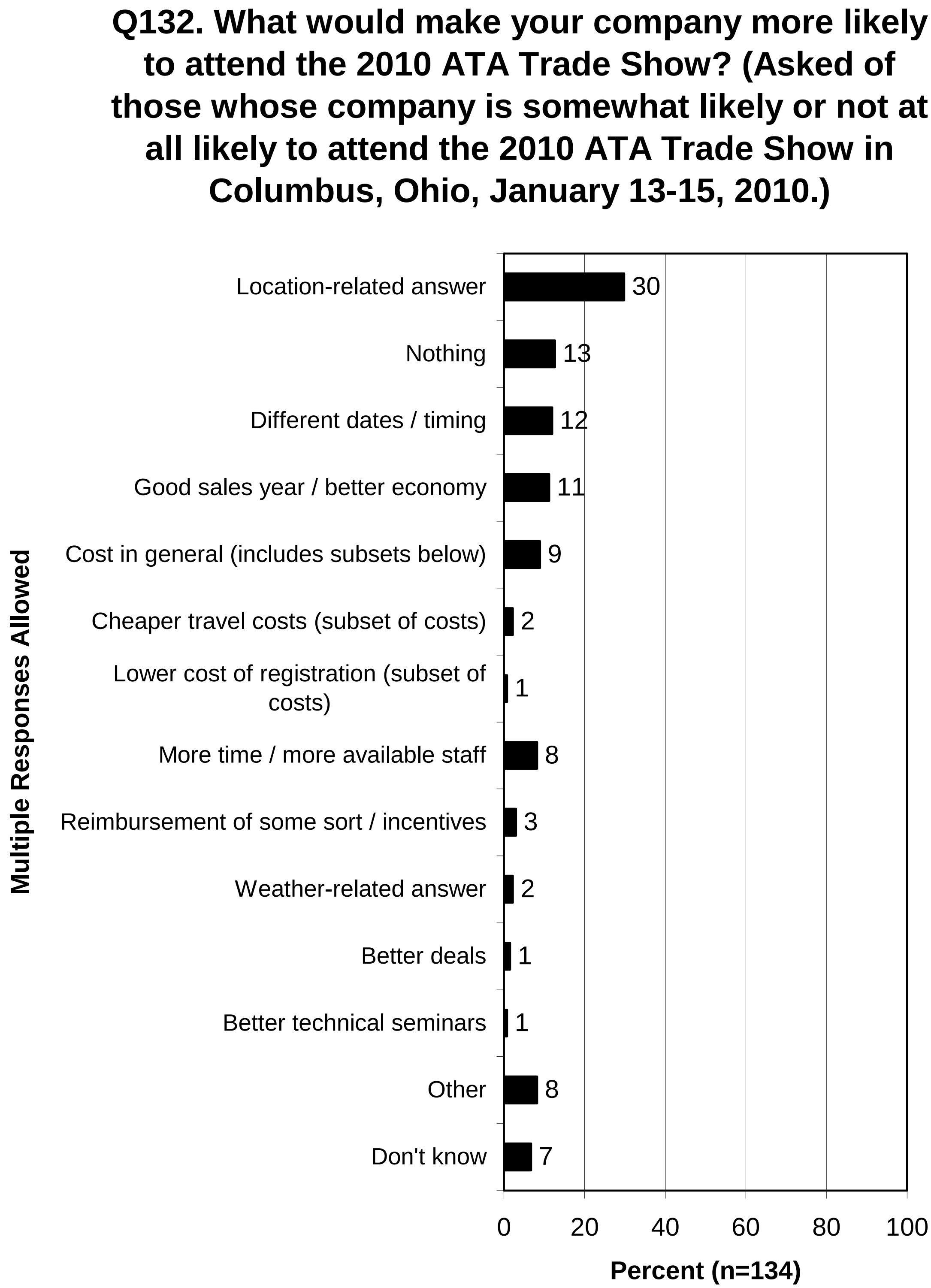


Exhibitors Survey

Q172. Why is your company not at all likely to exhibit at the 2010 ATA Trade Show? (Asked of those whose company is not at all likely to exhibit at the 2010 ATA Trade Show in Columbus, Ohio, January 13-15, 2010.)

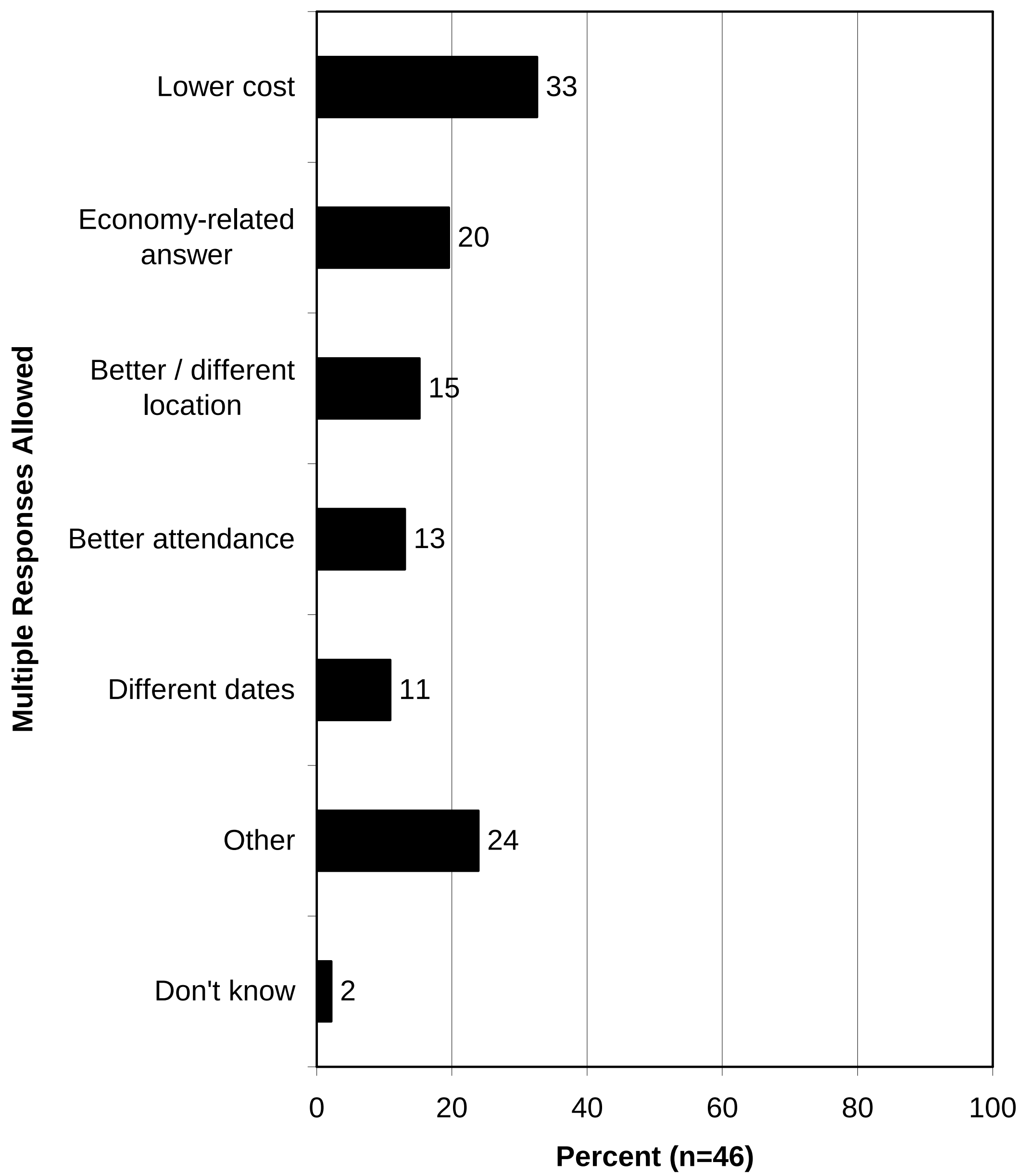


Retailers Survey



Exhibitors Survey

Q173. What would make your company more likely to exhibit at the 2010 ATA Trade Show? (Asked of those whose company is somewhat likely or not at all likely to exhibit at the 2010 ATA Trade Show in Columbus, Ohio, January 13-15, 2010.)



SATISFACTION AND DISSATISFACTION WITH THE ATA TRADE SHOW

- Both surveys examined satisfaction or dissatisfaction with the Trade Shows.
  - In answer to a very basic question, the overwhelming majority of retailers (80%) indicated being *very* or *somewhat* satisfied, overall, with the ATA Trade Shows in general. In fact, a majority (59%) are *very* satisfied. The survey then asked specifically about satisfaction with the 2009 Trade Show, among those who attended: 96% were *very* or *somewhat* satisfied, with 77% being *very* satisfied.
    - A similar question asked retailers to rate the benefits of attending ATA Trade Shows in general for their company: the overwhelming majority (87%) rate the benefits as excellent or good, about evenly divided between those two responses. Those who rated it fair or poor were asked in follow-up to indicate why they gave a fair or poor rating: they most commonly gave an answer relating to the benefits not offsetting the costs, that they buy directly from reps (i.e., the Trade Show is not necessary), that other shows are more convenient, and that not enough new products are shown/manufacturers show old and overstocked products.
  - Exhibitors were asked about their overall satisfaction or dissatisfaction with ATA Trade Shows: the overwhelming majority (92%) are *very* or *somewhat* satisfied, about evenly divided between those two responses. They were then asked about their satisfaction/dissatisfaction with specifically the 2009 Trade Show in Indianapolis: 88% were satisfied, with 51% being *very* satisfied; only 6% were dissatisfied.
    - Asked to rate the benefits of exhibiting at the ATA Trade Shows in general for their company, a majority of exhibitors (74%) rate them excellent or good. Those who gave a fair or poor rating most commonly attributed their rating to their feeling that the benefits of exhibiting do not outweigh the costs or that the Trade Show attendance is (perceived to be) poor.

- The survey asked retailers eleven questions about how favorable or unfavorable various factors were in their overall 2009 Trade Show experience. The answer set used the following scale: *very* favorable, *somewhat* favorable, *somewhat* unfavorable, *very* unfavorable, or the factor did not affect the overall experience. The results were ranked.

- Five factors had a majority indicating that it was *very* or *somewhat* favorable in their overall 2009 Trade Show experience: the conditions in and around the convention center in Indianapolis (84% said this was *very* or *somewhat* favorable), the cost of registration (72%), the cost of local restaurants in Indianapolis (64%), the traffic in and around Indianapolis (56%), and the travel distance to Indianapolis (51%).
- Conversely, top *unfavorable* factors are the cost of parking (22% said this was *very* unfavorable) and the cost of food at the Trade Show (22%).
- Following this series, retailers were asked if there were any other factors that favorably affected their 2009 Trade Show experience. Top answers among those who gave a favorable factor include the location of the show, the layout of the show, the shuttle service, and the seminars/product evaluations.
- Retailers were also asked if there were any other factors that unfavorably affected their 2009 Trade Show experience. Top answers among those who gave an unfavorable factor include the dates of the show, the location of the show, and the security at the show.

➢ In parallel questions in the exhibitor survey, exhibitors were to rate how favorable 28 factors were in their overall 2009 Trade Show experience, using the same scale that was used above.

- In examining the graph of the percentage saying that each factor was *very* favorable, a distinct upper tier emerges, with a majority or near-majority saying the factor was *very* favorable: time allotted for tear down (64%) and setup (63%), getting their staff onto the floor (63%), floor security (63%), floor hours for exhibitors (62%), getting badge holders (59%), conditions of the convention center (55%), organization of the floor (53%), booth move out (50%), management of floor space (48%), and booth space size (48%).
- On the other end, top *unfavorable* factors are the cost of food at the Trade Show (22% said this was *very* unfavorable), unloading at the dock (14%), cost of parking (11%), cost of transportation for their booth and people traveling to/from Indianapolis (10%), travel distance (9%), and the cost of hotel rooms in Indianapolis (8%).
- Following this series, exhibitors were asked if there were any other favorable or unfavorable factors in their 2009 Trade Show experience. Top other favorable factors

include the location of the Trade Show and the Trade Show staff. Top other unfavorable factors include set-up/floor accommodations, costs, not enough attendance, and problems at the dock.

- The survey asked retailers to rate 17 aspects of the 2009 Trade Show, using an excellent-good-fair-poor scale (among those who attended the 2009 Trade Show). The results were ranked.
  - In looking at the sums of excellent and good responses, four items stand out above the rest: the registration process (91% gave this an excellent or good rating), the Shooting Demonstration Areas (87%), the Show Guide (87%), and the general show signage (87%). A second tier consists of the Featured Products Area (77%), the goodie bags (76%), and the dates of the ATA Trade Show (74%).
  - The aspects that had the highest percentages giving a fair or poor rating were the dates of the 2009 Trade Show (25% gave a fair or poor rating), the Real Deal (24%), the Great Giveaway (20%), and the goodie bags (17%).

- The survey asked exhibitors to rate 18 aspects of the 2009 Trade Show, again using the excellent-good-fair-poor scale (among those who exhibited at the 2009 Trade Show). The results were ranked.
  - In looking at the sums of excellent and good responses, three items stand out above the rest: the Show Guide (85%), the registration process (81%), and the general show signage (80%). Other items to which a majority gave an excellent or good rating are the dates of the ATA Trade Show (67%), the Members Lounge (64%), the Shooting Demonstration Areas (61%), the Featured Products Area (57%), and the Show Daily News Flyer (56%).
  - The aspects that had the highest percentages giving a fair or poor rating were the dates of the 2009 Trade Show (29%), the Literature Kiosk (26%), the Great Giveaway (23%), and the Plasma Screen Information (22%).

- Open-ended questions asked retailers and exhibitors to indicate any aspects of the ATA Trade Show that they would like to see improved.
  - Retailers most commonly said that nothing needed to be improved; otherwise, commonly named improvements include a better location, more discounts on associated expenses such as hotels, more discounts on products at the show, seminars, and better overall organization.
  - Exhibitors most commonly said that they wanted lower overall costs associated with going to and exhibiting at the Trade Show, more attendees, or different dates. The second most common response was that nothing needed to be improved.

- The survey asked retailers if there were any other products or services not at the 2009 Trade Show that they would like to see or that were at the show but that they want to see more of. The most common answers were Matthew's Archery, that there should be more vendors/manufacturers, accessories companies (e.g., knives, shoes), and seminars.

- Exhibitors were asked about their satisfaction or dissatisfaction with the current Trade Show booth space selection system, after having some aspects of it explained. The overwhelming majority (80%) are satisfied, with only 7% being dissatisfied (the rest giving neutral answers).
  - The few that are dissatisfied were asked in follow-up to indicate why they are dissatisfied: problems getting desired booth space/problems with selection process and a dislike of the point system were the top answers.

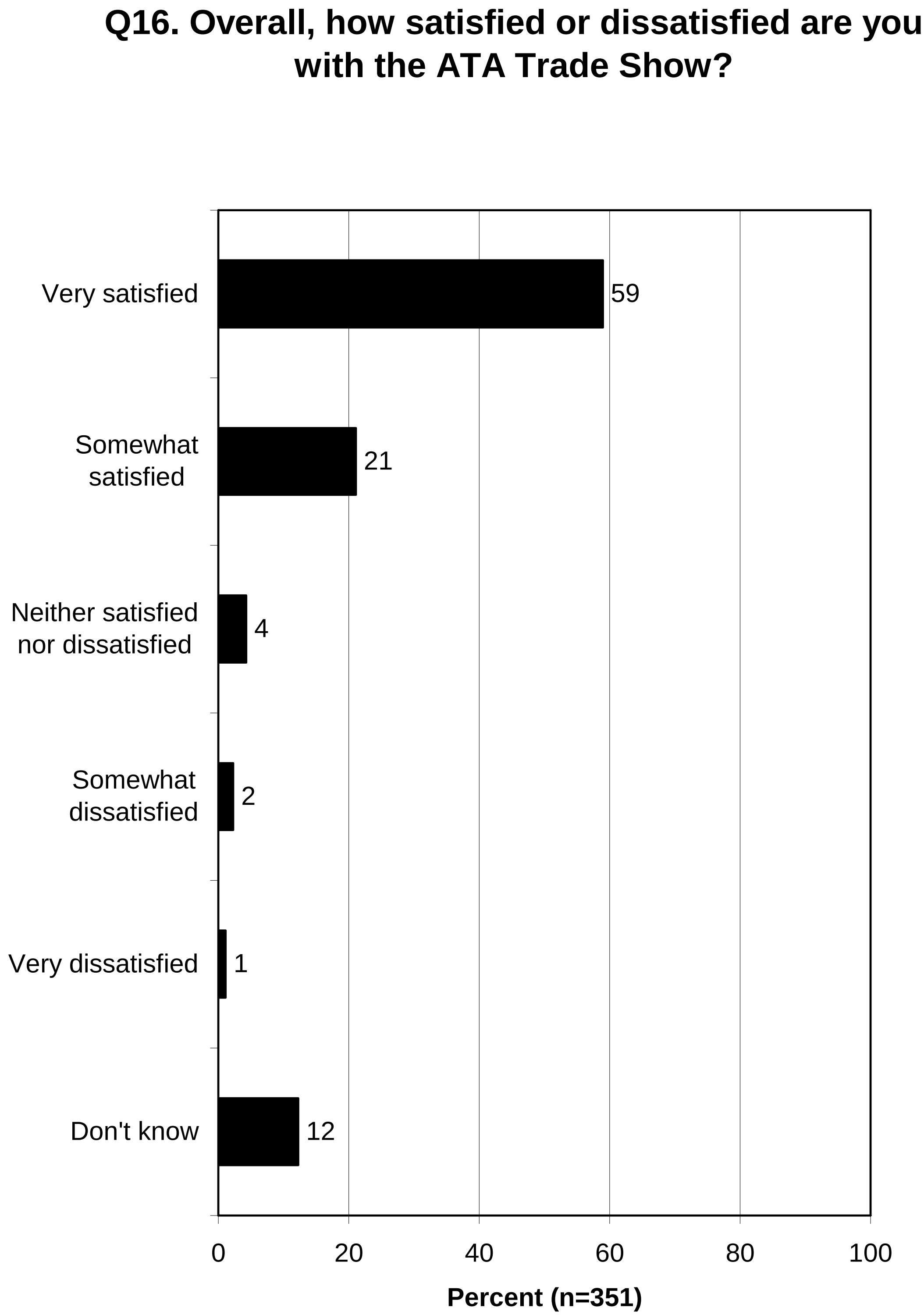
- Both surveys asked those who read the ATA e-newsletter to rate the quality of the information it provides.
  - In the retailer survey, 84% rate it excellent or good, with 25% rating it excellent.
    - Those who gave a fair or poor rating were asked to indicate why they rated it so, and the most common answers are that it does not pertain to needs or that it just is not interesting/does not hold one's attention.

- In the exhibitor survey, 85% rate the e-newsletter excellent or good, with 19% rating it excellent.
    - Those who gave a fair or poor rating were asked to indicate why they rated it so, and the most common answers are that it is not interesting/does not hold one's attention or that it does not pertain to needs.

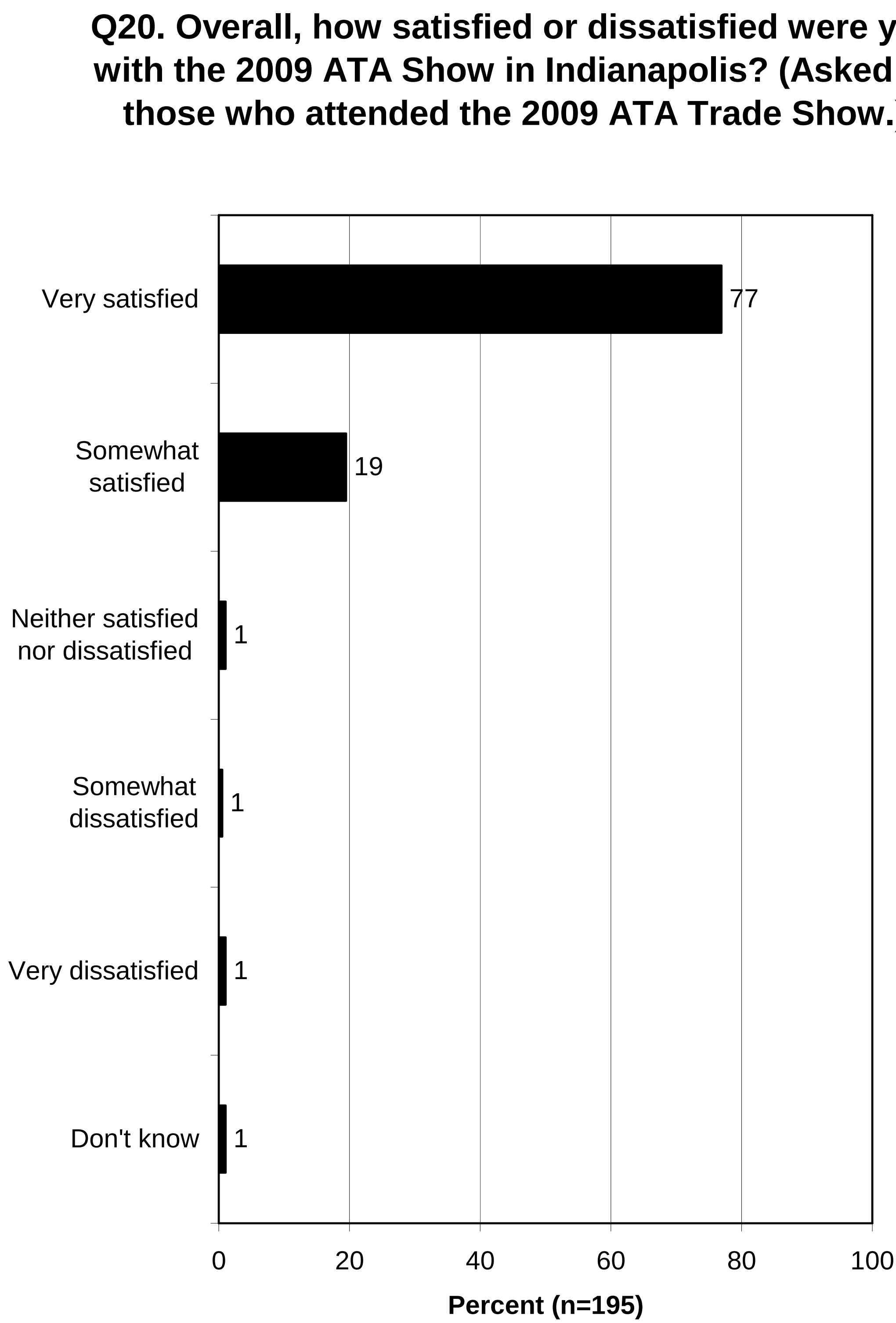
➢ Both surveys asked those who read ATA's monthly columns in magazines such as *Inside Archery*, *ArrowTrade*, or *Archery Business* to rate the columns.

- In the survey of retailers, 88% rate them excellent or good, with 33% rating them excellent.
    - Those who gave a fair or poor rating were asked to indicate why they rated it so, and the most common answers are that it just is not interesting/has nothing new or that the information is (perceived to be) inaccurate.
    - Retailers were asked if they agreed or disagreed that the ATA's monthly columns in those magazines usually feature topics that meet their company's needs: 76% agreed, while only 4% disagreed.
- In the exhibitors survey, 84% rate the columns excellent or good, with 24% rating them excellent.
    - Top reasons for rating them fair or poor include that the information is perceived to be old/not current, that the columns are not interesting, that the columns do not have enough information/enough detail, and answers related to the quality of writing/layout.

Retailers Survey

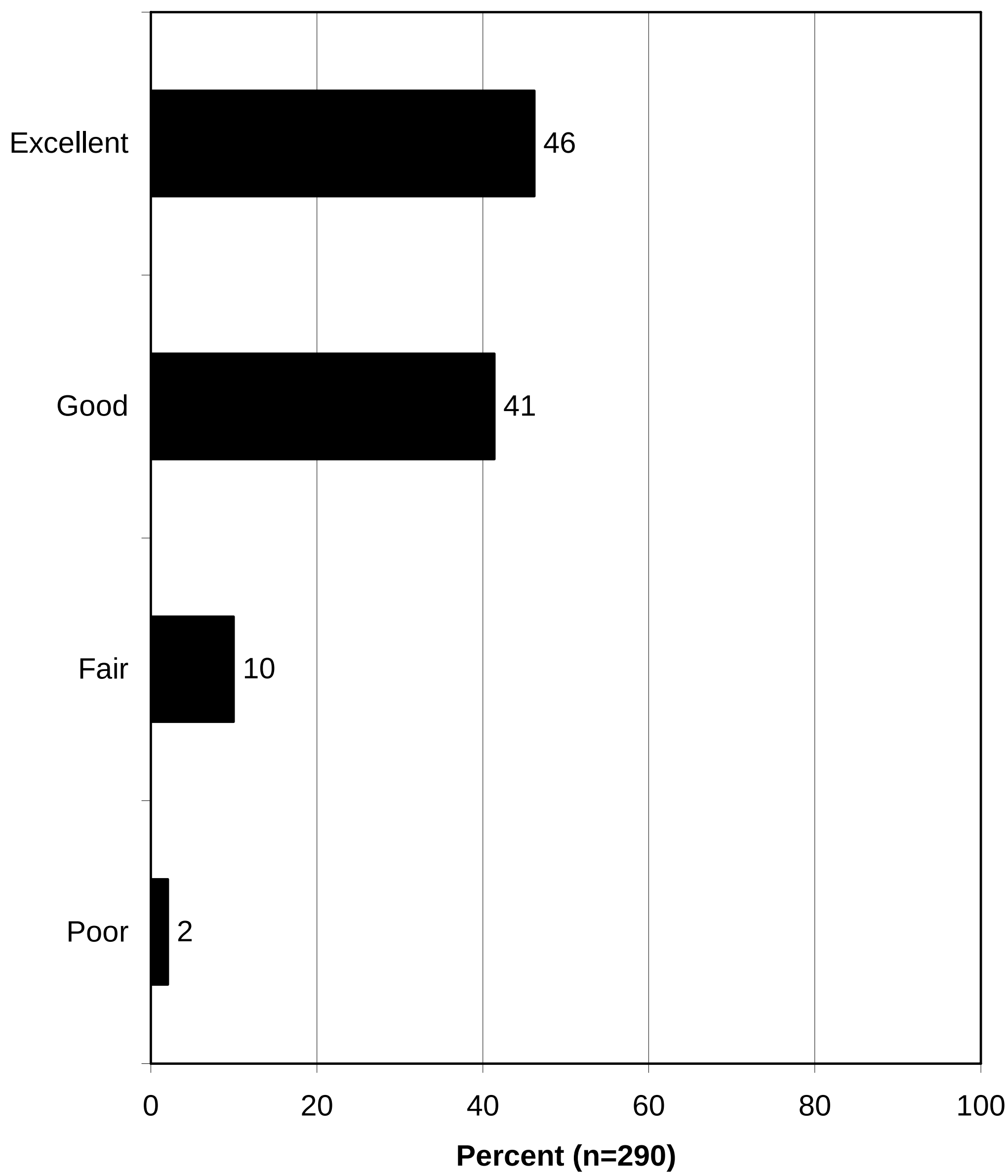


Retailers Survey



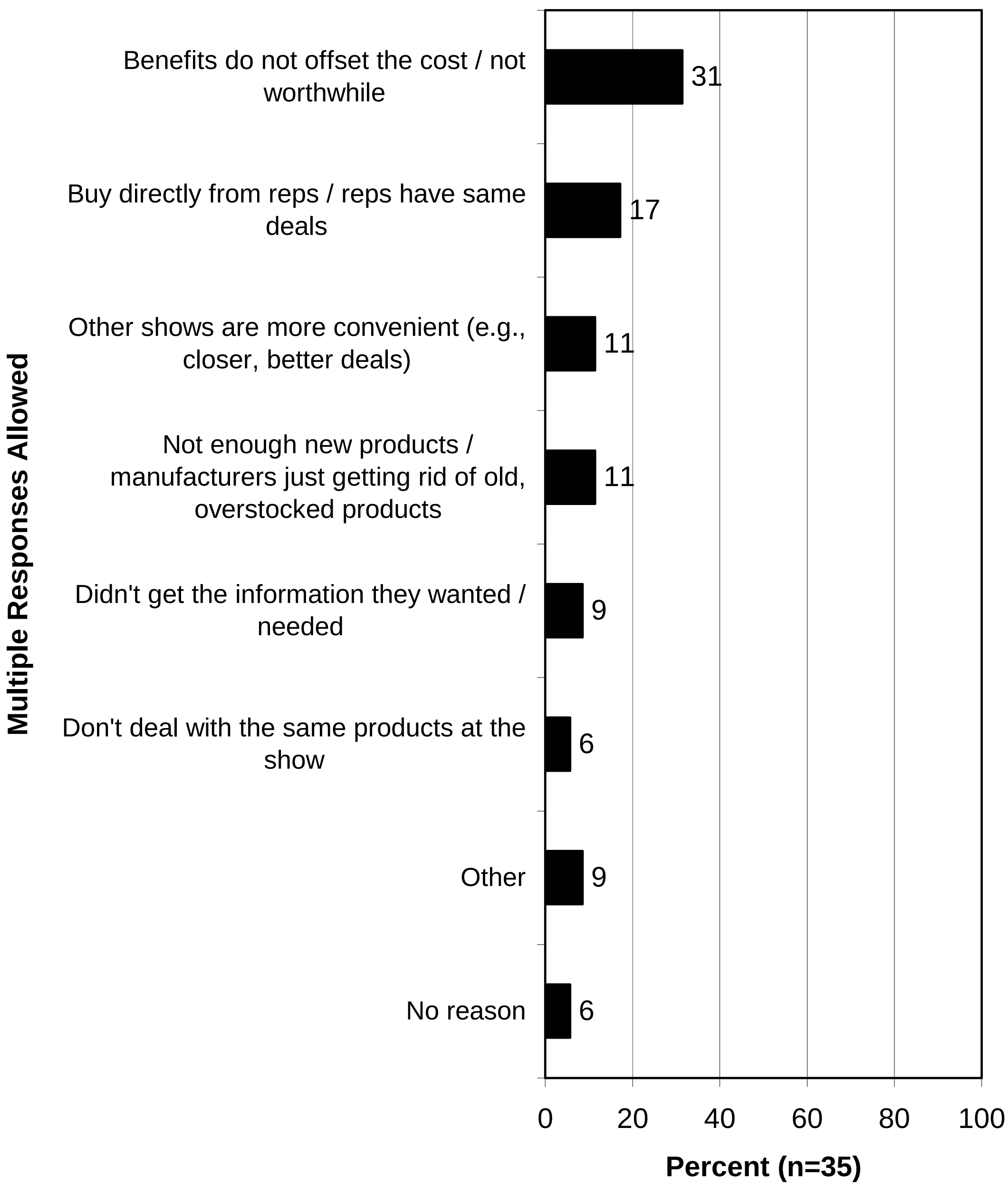
Retailers Survey

Q126. How would you rate the benefits of attending ATA Trade Shows in general for your company? (Asked of those who have attended any ATA Trade Show from 2003-2009.)

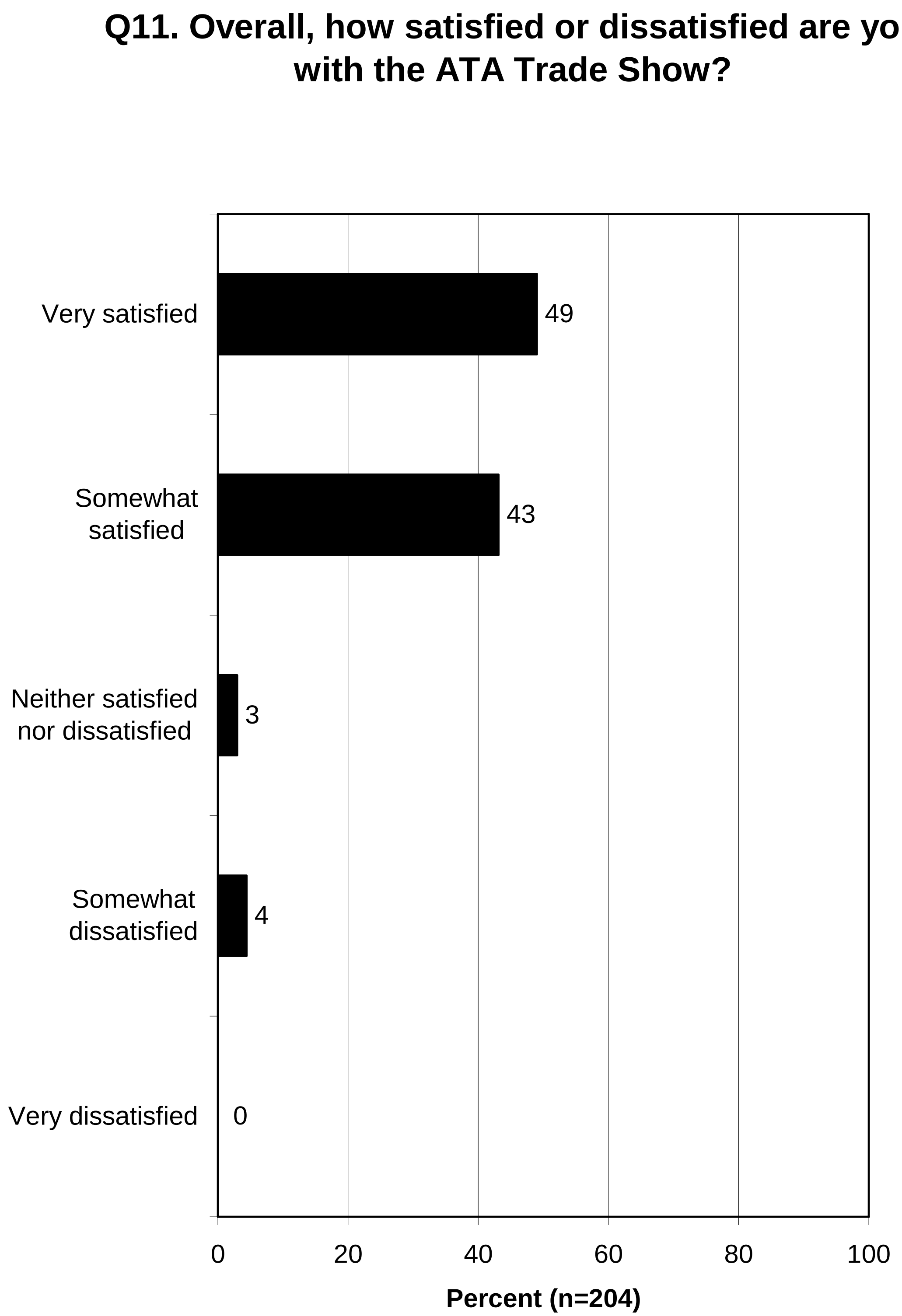


Retailers Survey

Q127. Why would you rate the benefits of attending ATA Trade Shows in general for your company as fair or poor? (Asked of those who attended any ATA Trade Show from 2003-2009 and who rated the benefits of attending ATA Trade Shows in general for their company as fair or poor.)

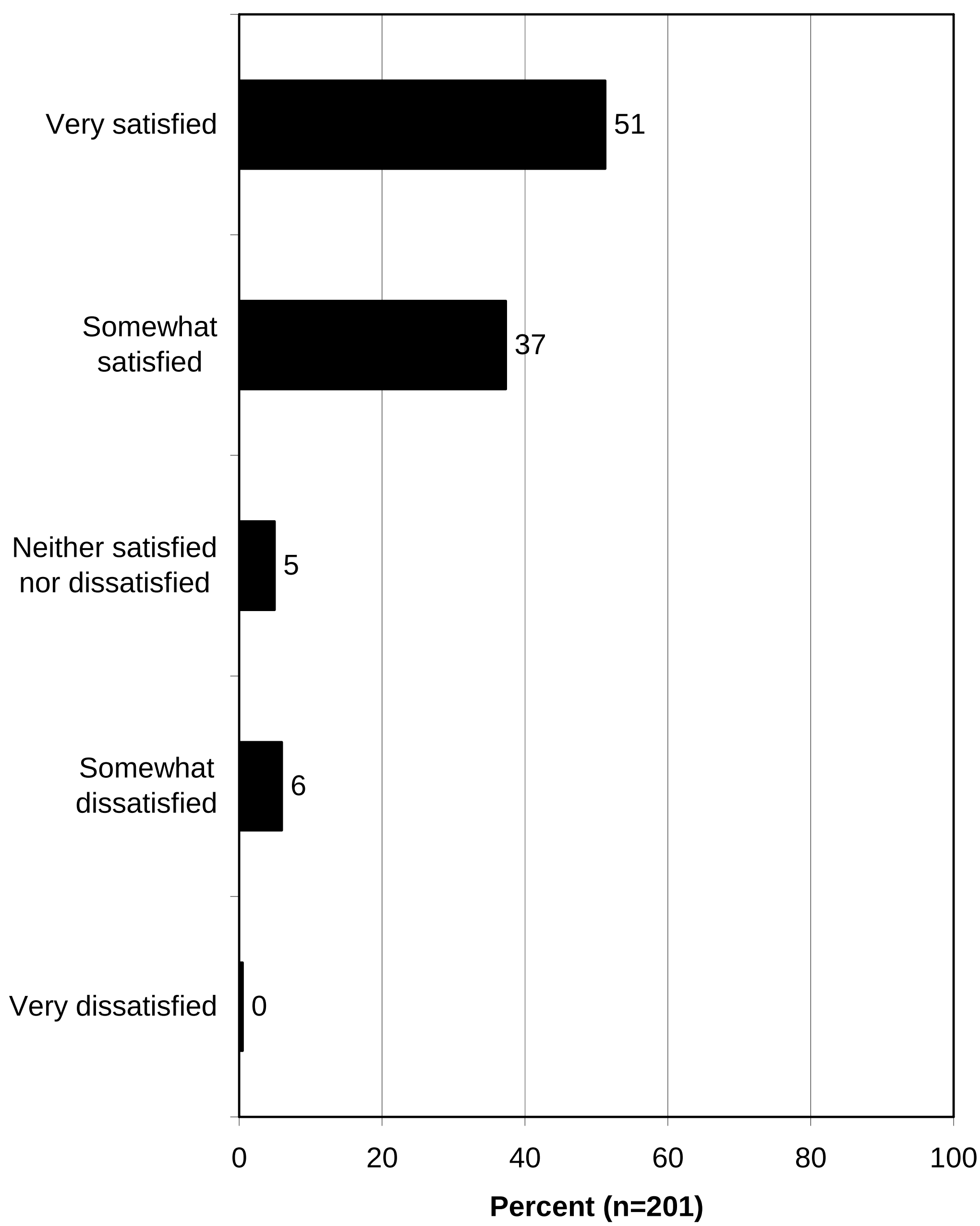


Exhibitors Survey

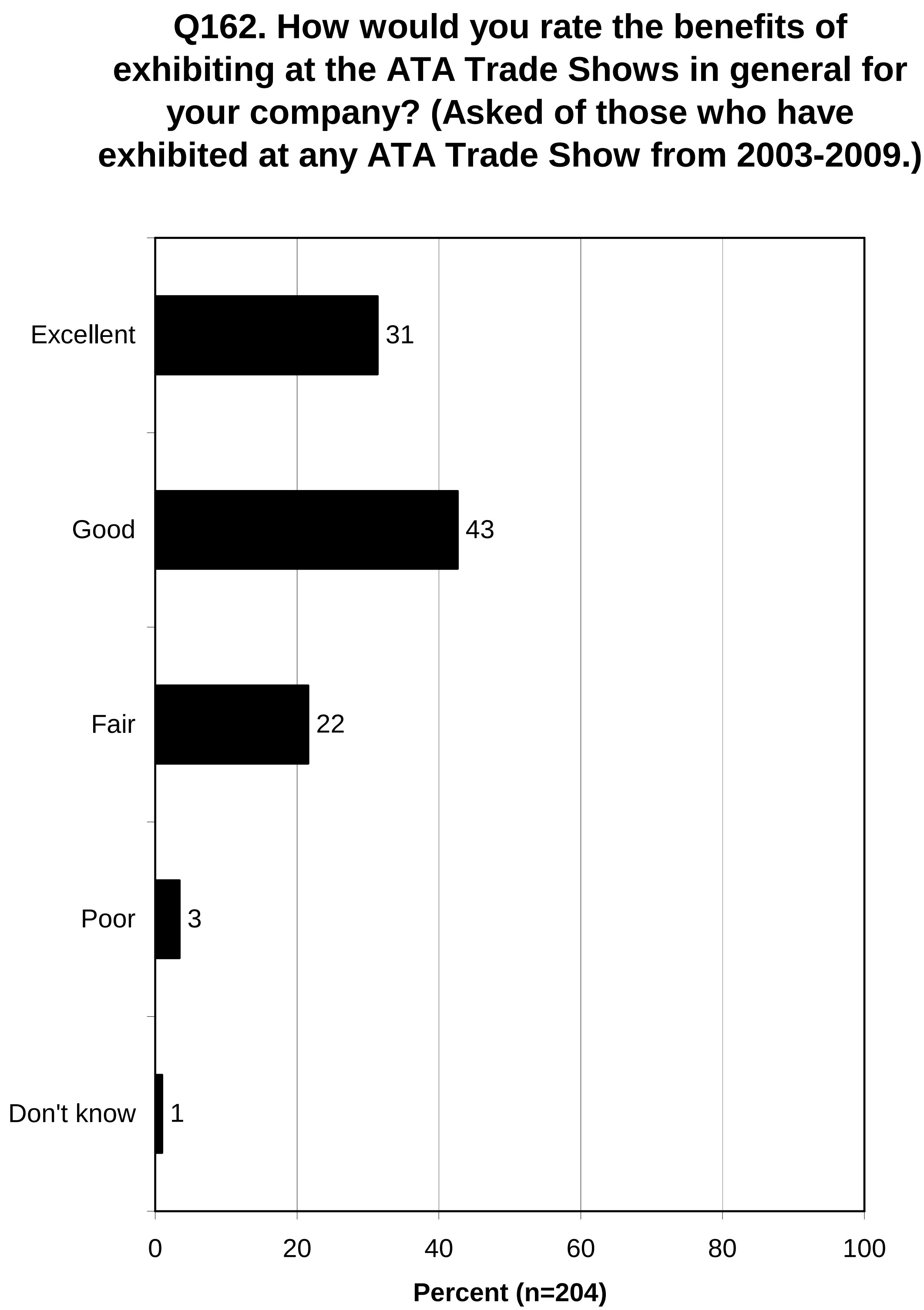


Exhibitors Survey

Q15. Overall, how satisfied or dissatisfied were you with the 2009 ATA Show in Indianapolis? (Asked of those who exhibited at the 2009 ATA Trade Show.)



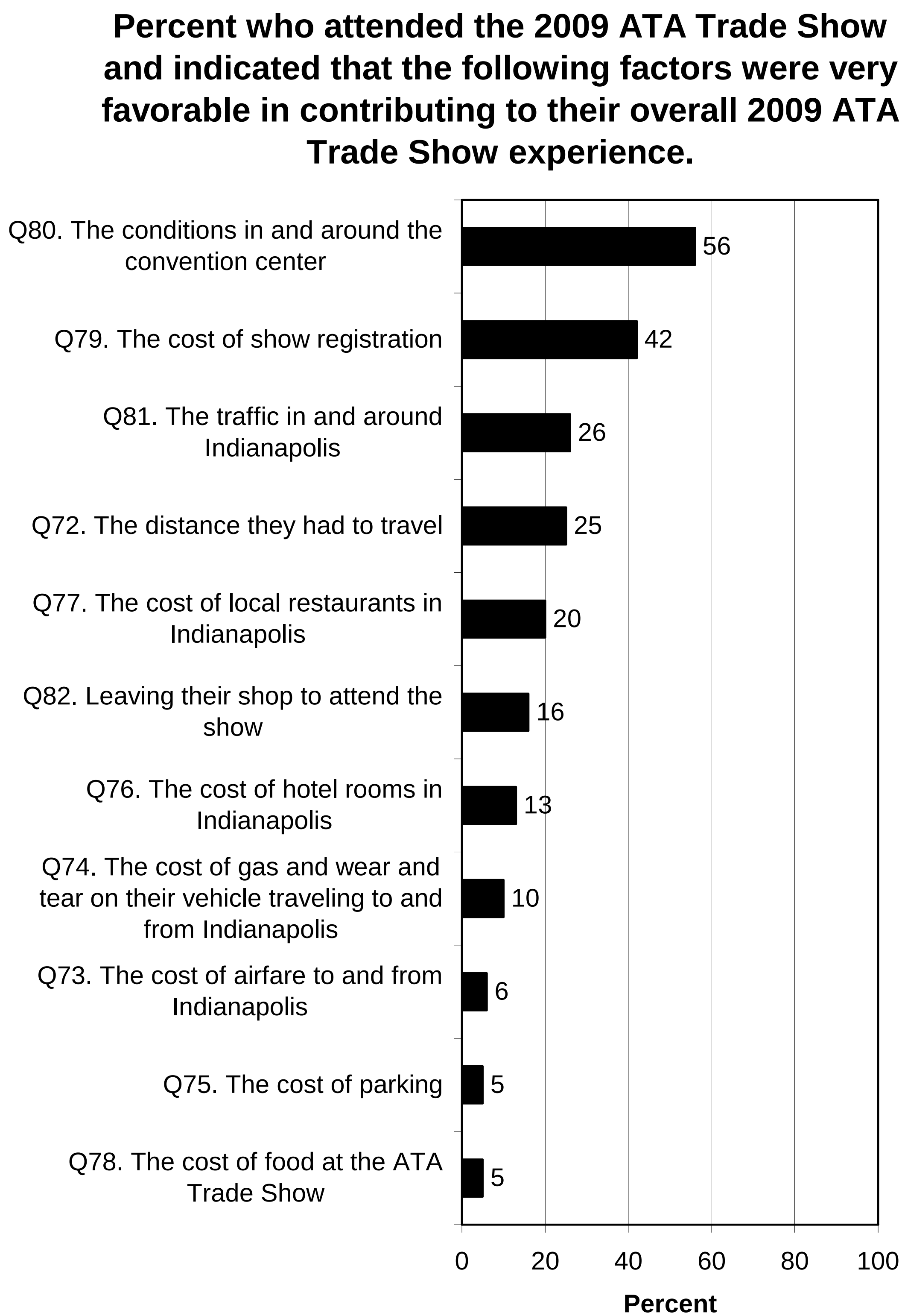
Exhibitors Survey



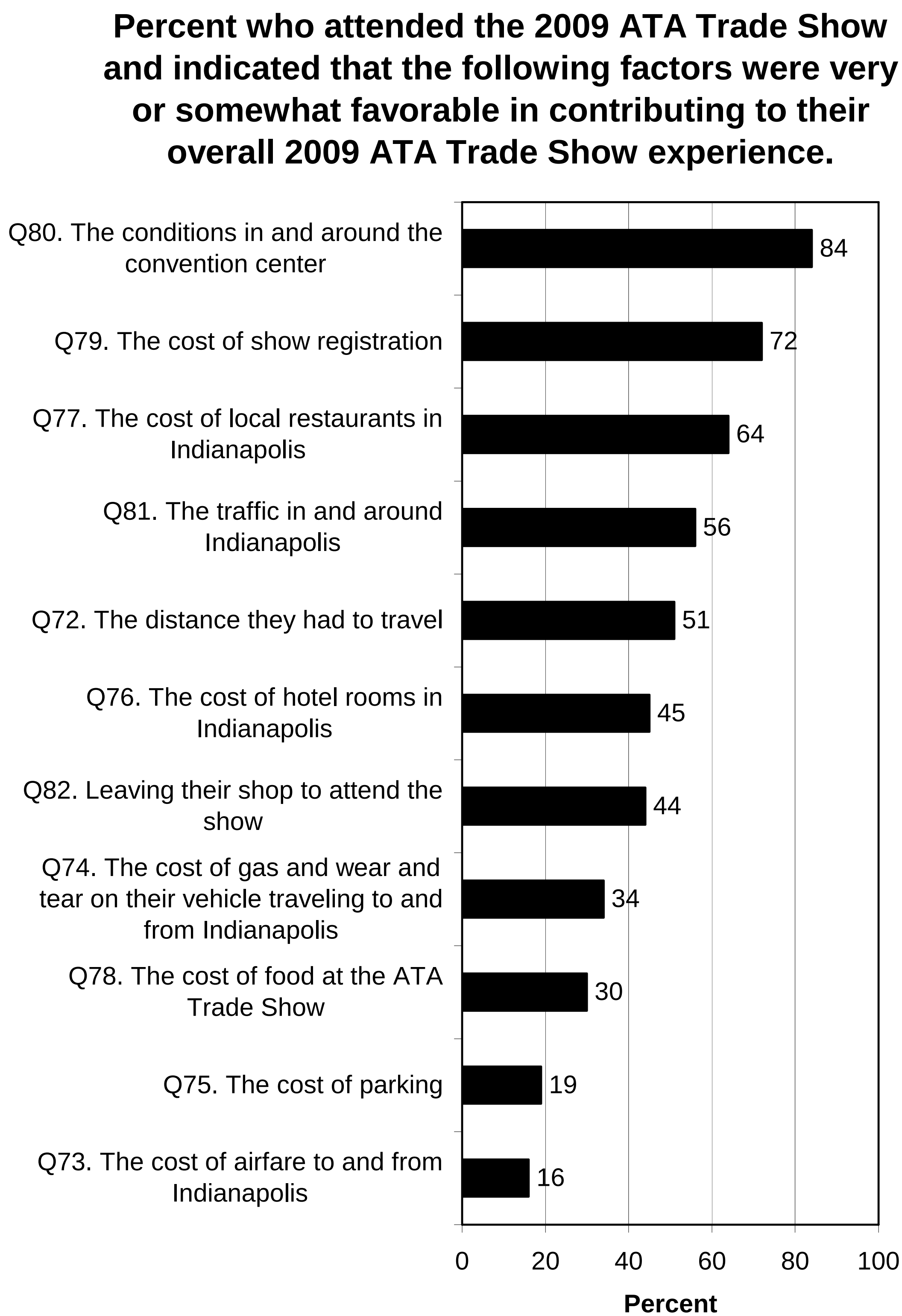
Exhibitors Survey

Q163. Why would you rate the benefits as fair or poor? (Asked of those who have attended any ATA Trade Show from 2003-2009 and who rated the benefits of exhibiting at the ATA Trade Shows in general for their company as fair or poor.)

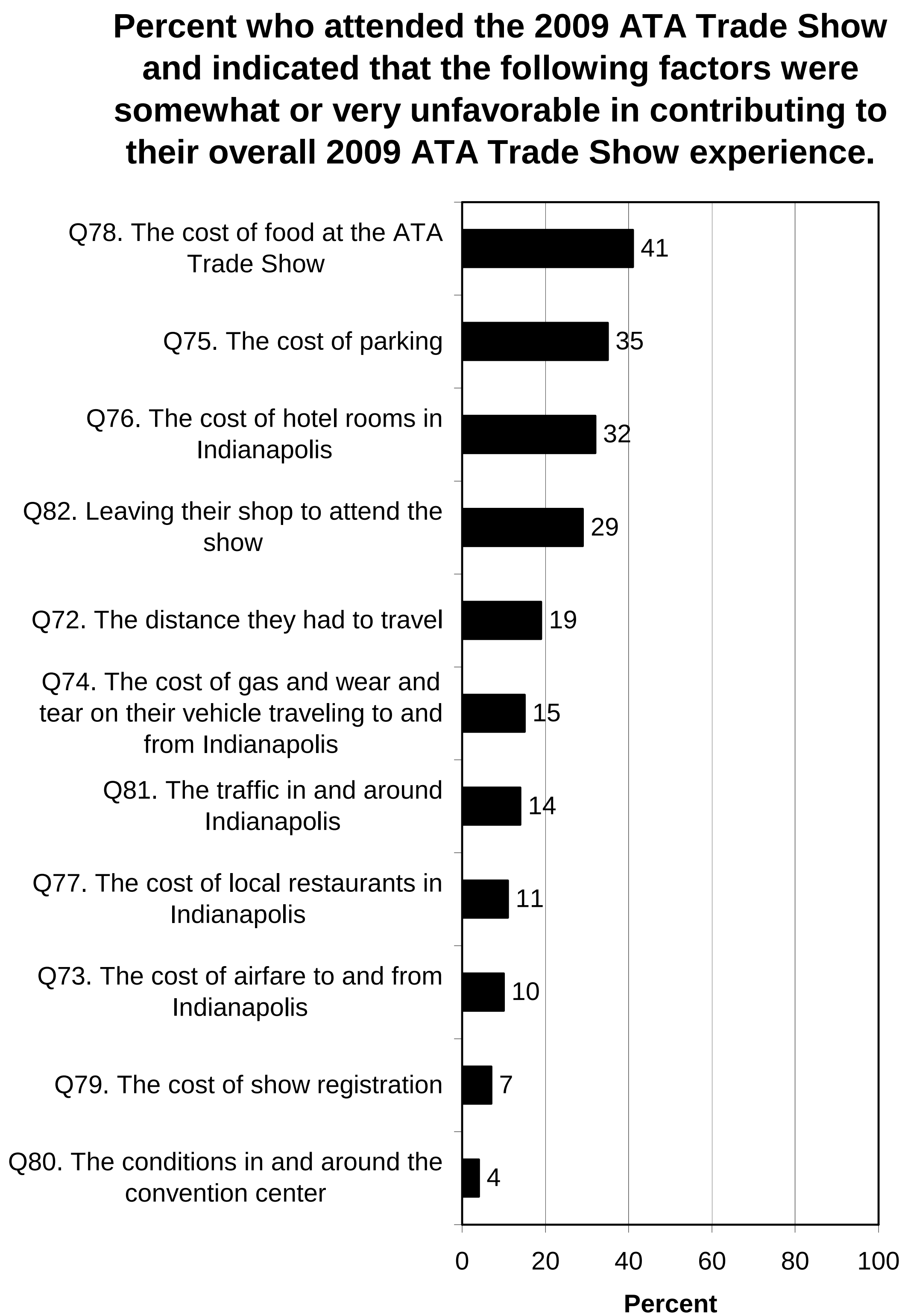
Retailers Survey



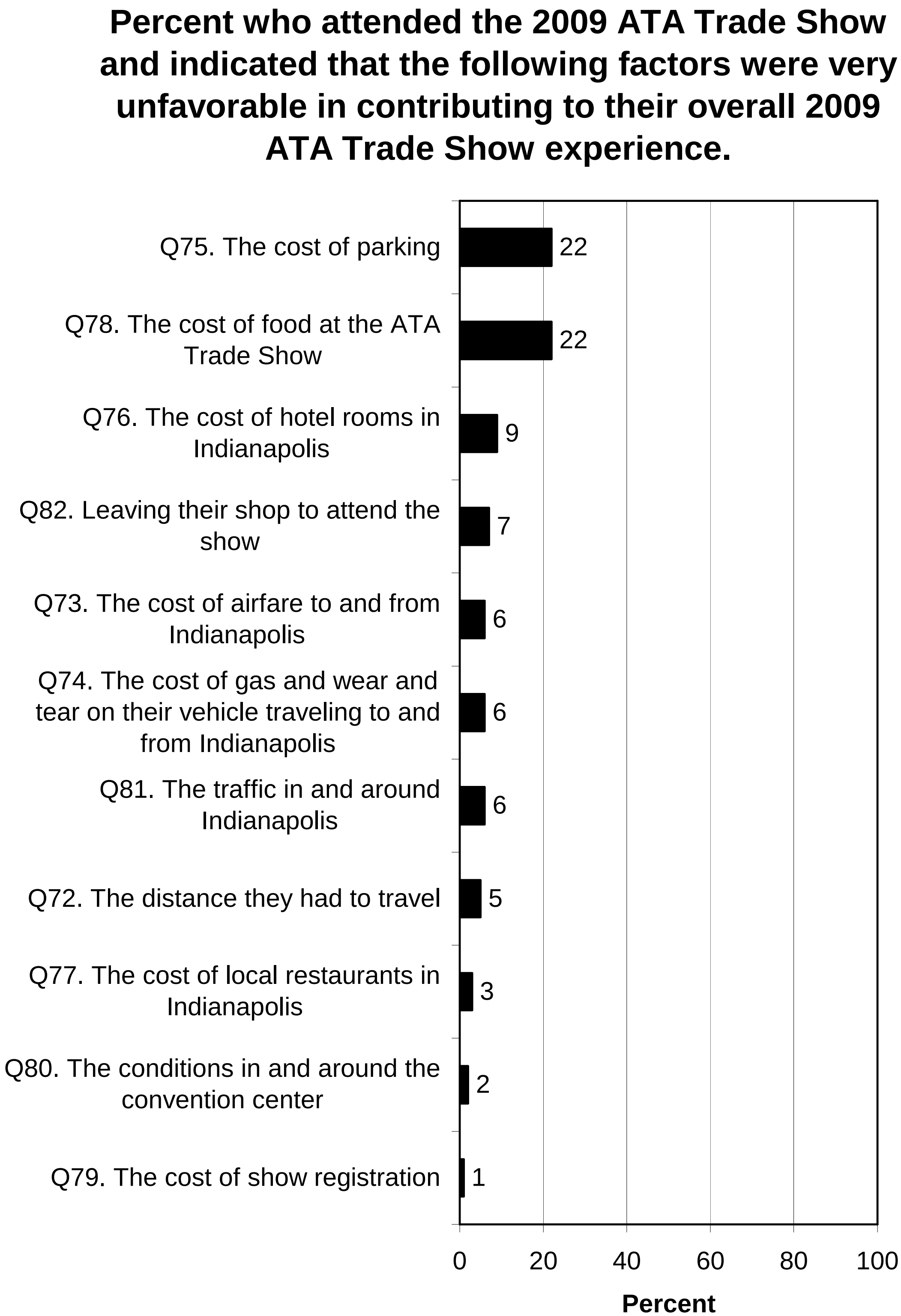
Retailers Survey



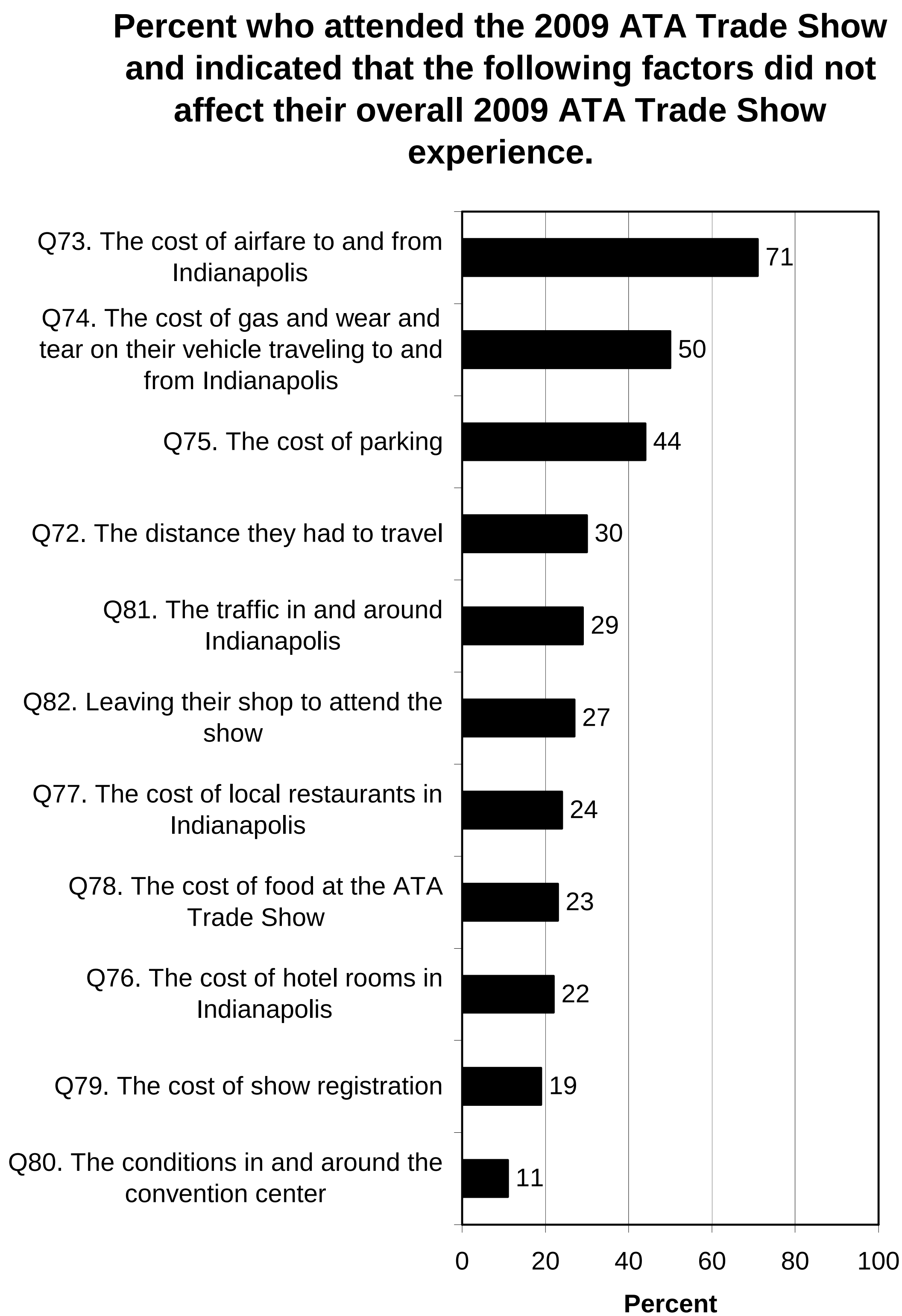
Retailers Survey



Retailers Survey



Retailers Survey

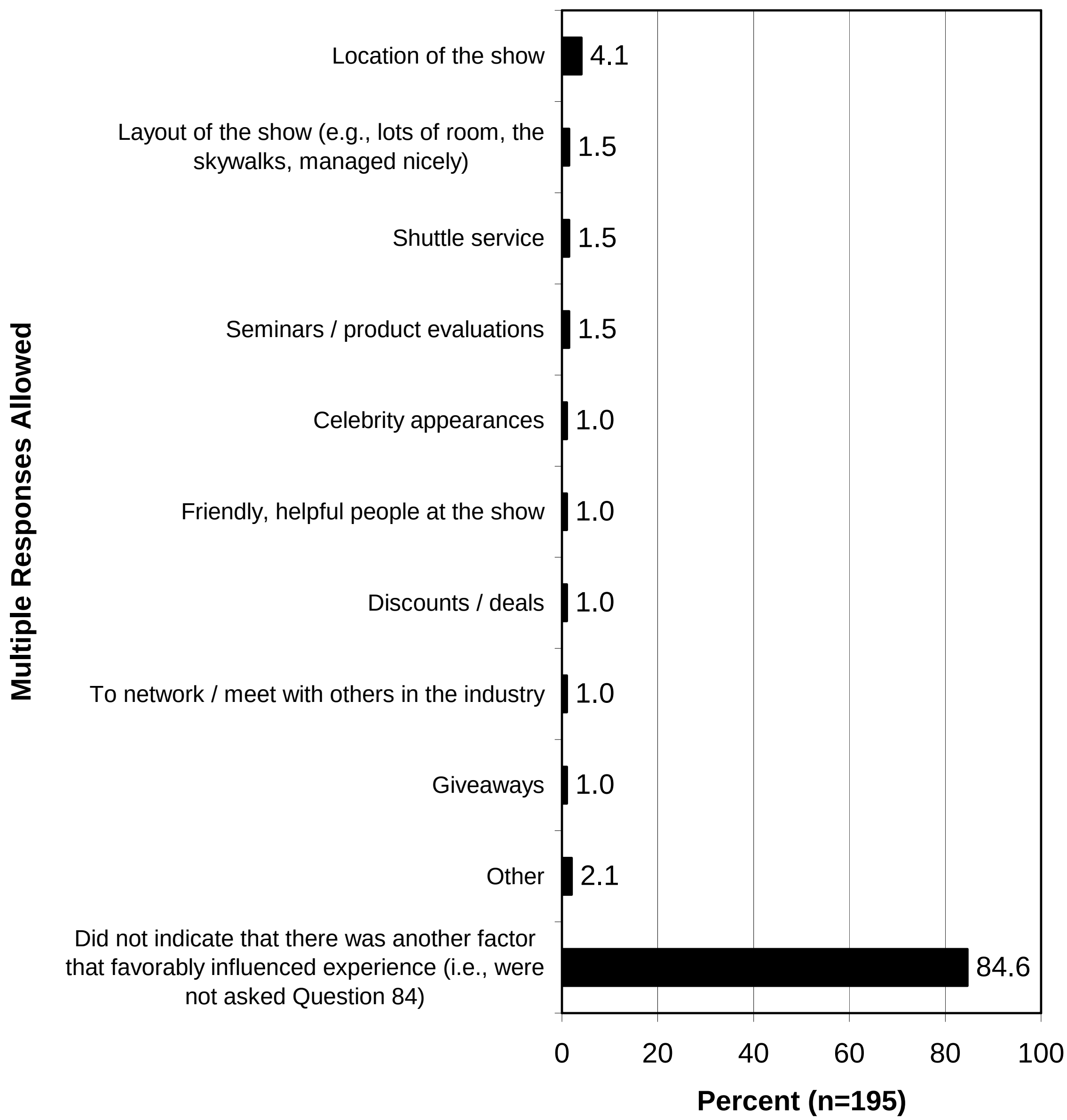


Retailers Survey

Q83. Are there any other factors that favorably influenced your 2009 ATA Trade Show experience?

Q84. What are the other factors?

(Among those who attended the 2009 ATA Trade Show.)

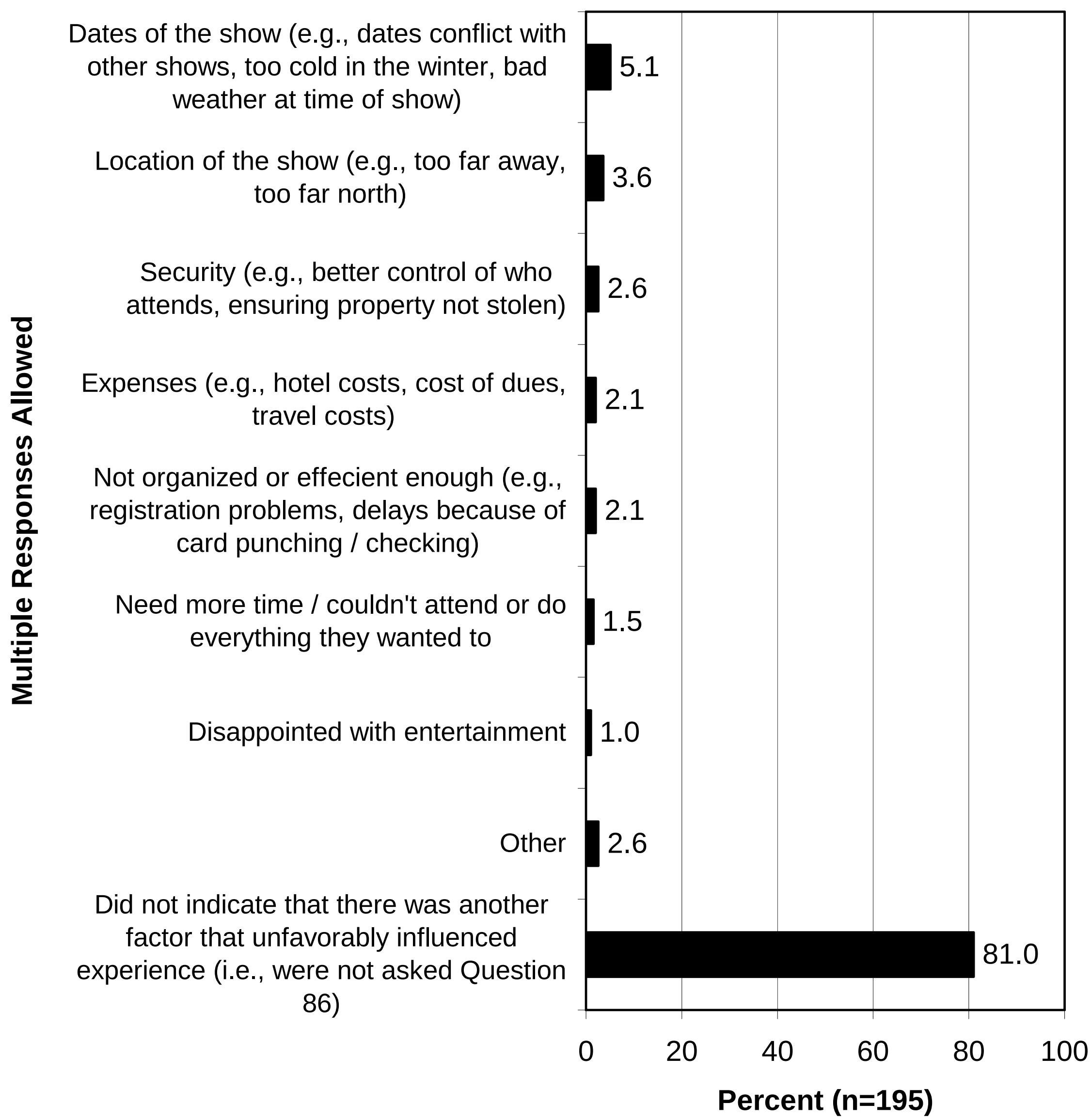


Retailers Survey

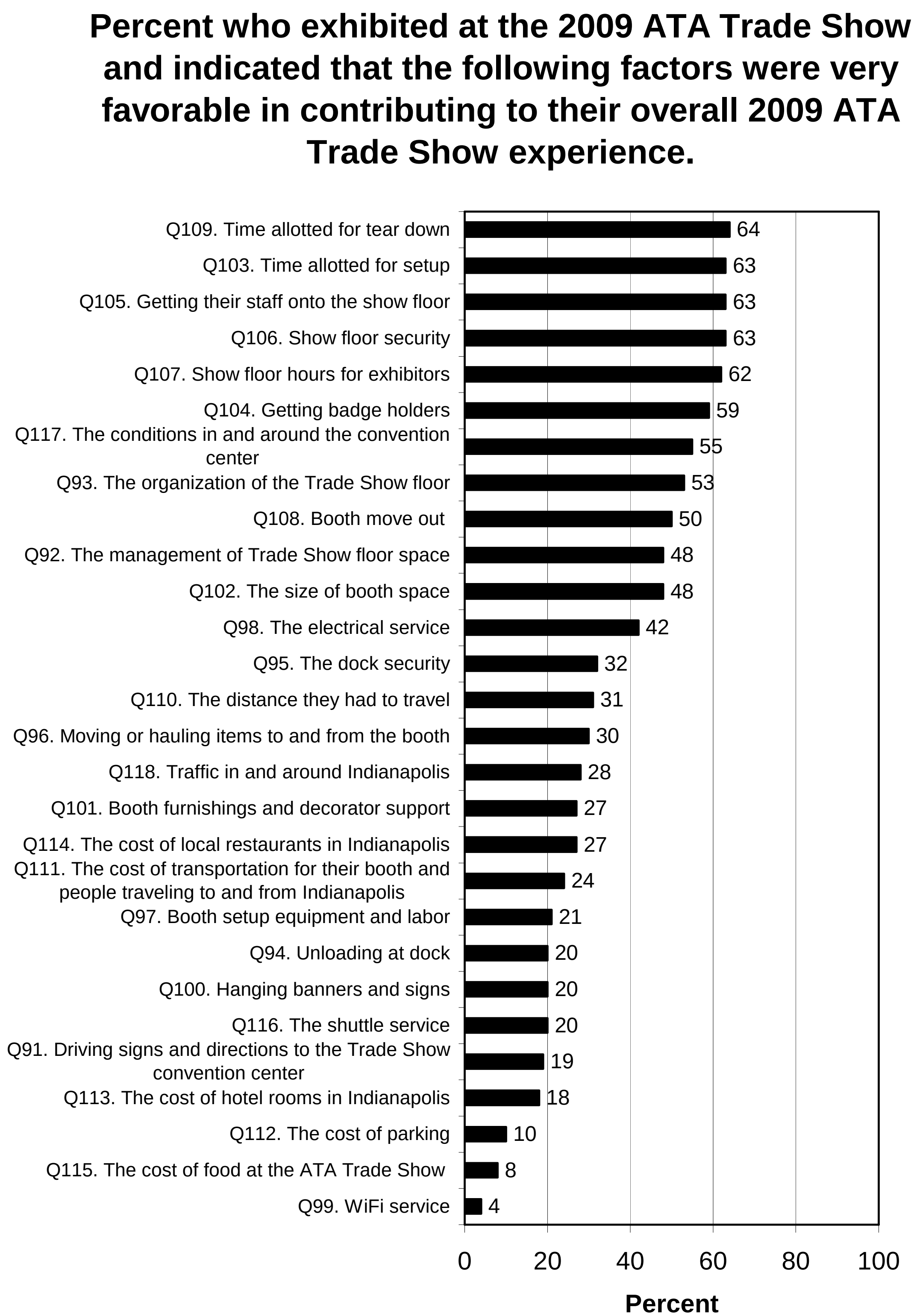
Q85. Are there any other factors that unfavorably influenced your 2009 ATA Trade Show experience?

Q86. What are the other factors?

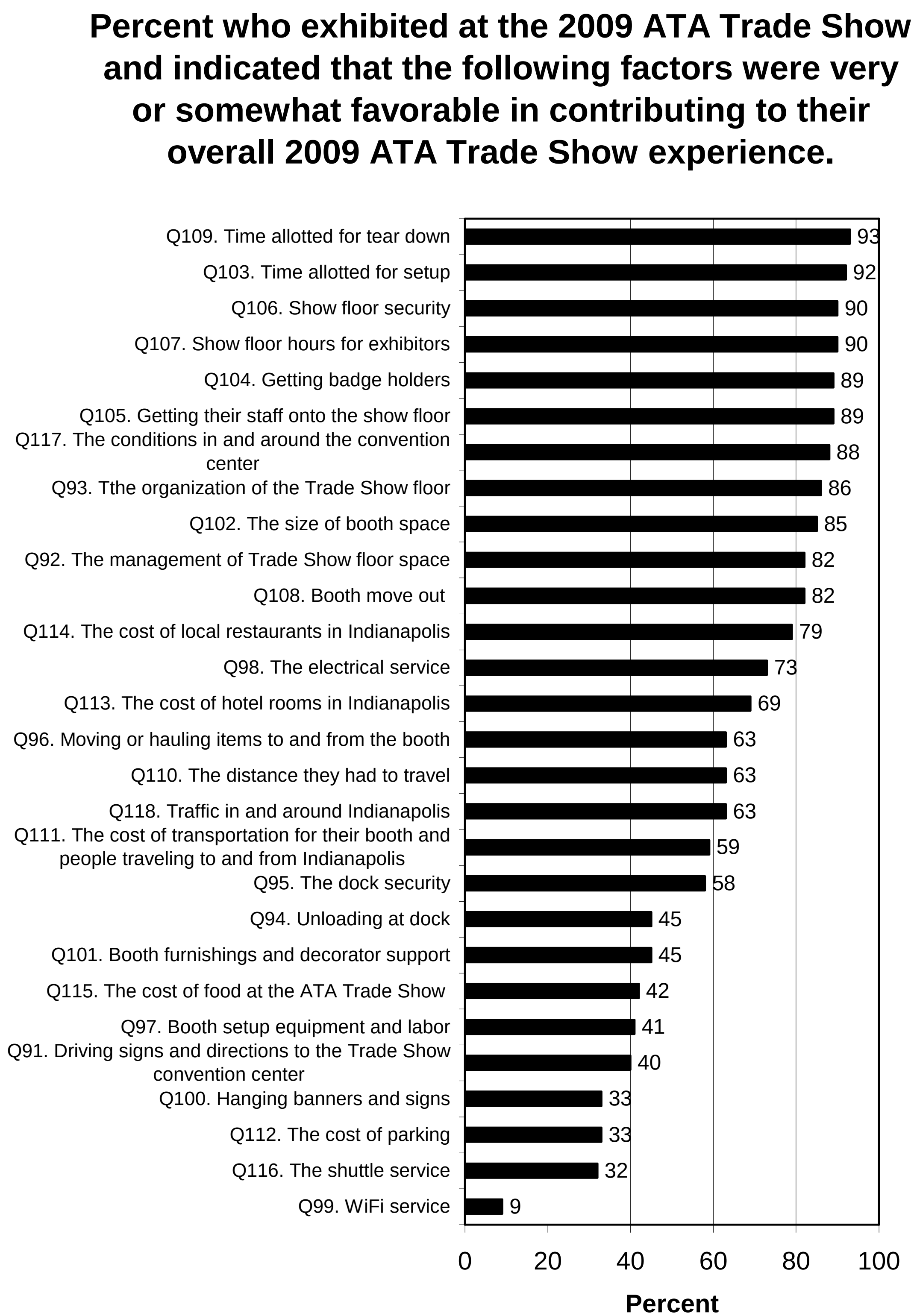
(Asked of those who attended the 2009 ATA Trade Show.)



Exhibitors Survey

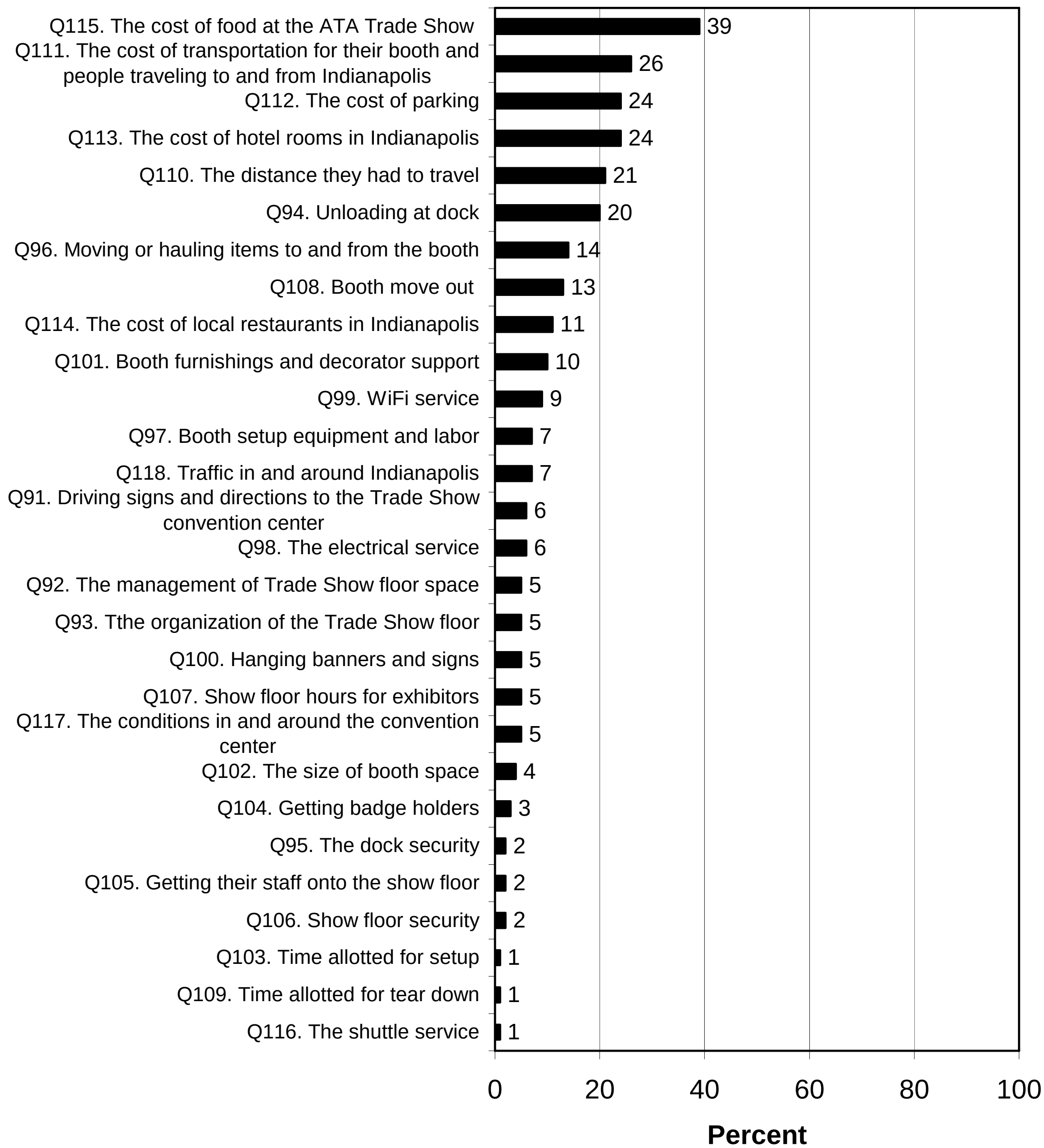


Exhibitors Survey



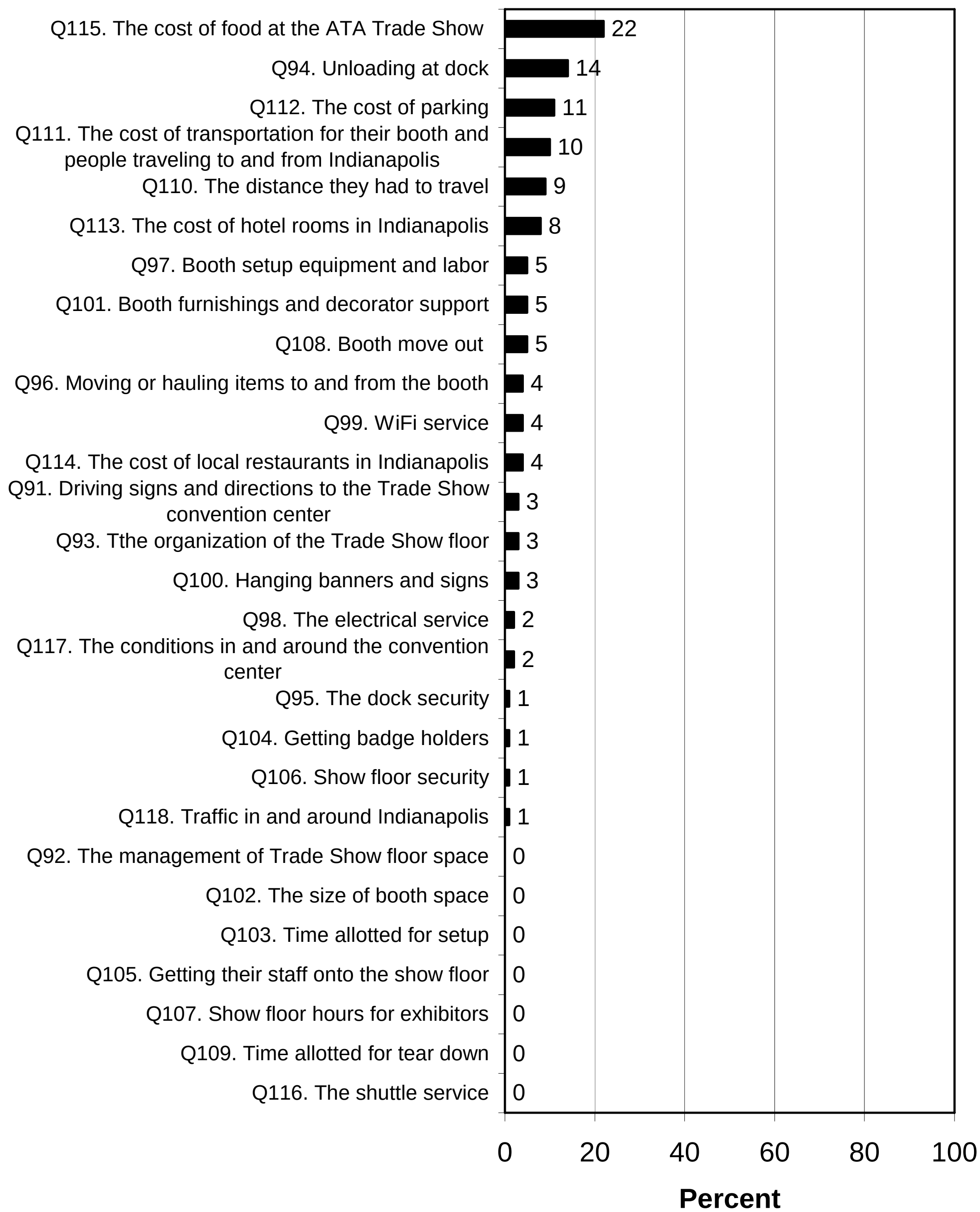
Exhibitors Survey

Percent who exhibited at the 2009 ATA Trade Show and indicated that the following factors were somewhat or very unfavorable in contributing to their overall 2009 ATA Trade Show experience.



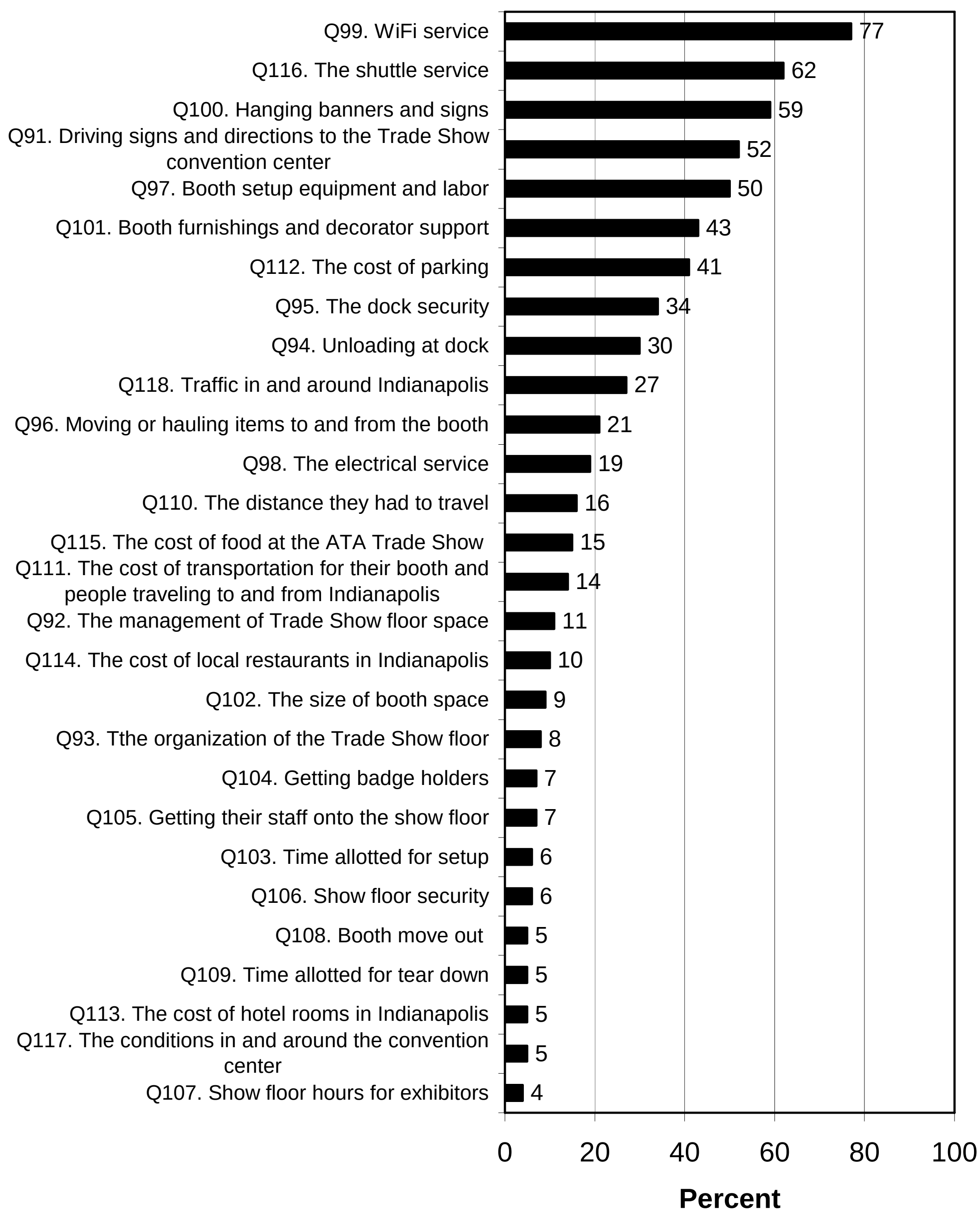
Exhibitors Survey

Percent who exhibited at the 2009 ATA Trade Show and indicated that the following factors were very unfavorable in contributing to their overall 2009 ATA Trade Show experience.



Exhibitors Survey

Percent who exhibited at the 2009 ATA Trade Show and indicated that the following factors did not affect their overall 2009 ATA Trade Show experience.

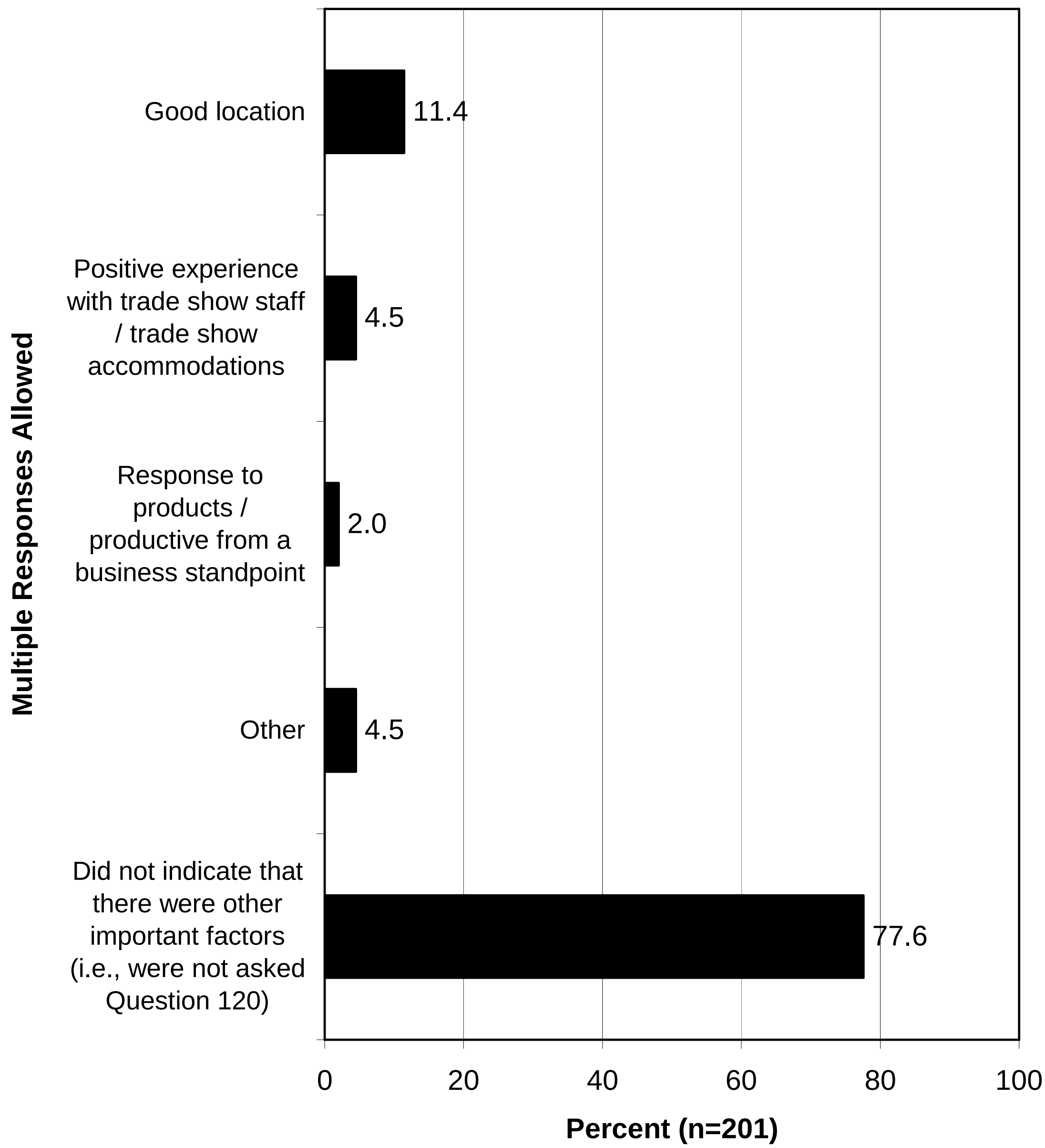


Exhibitors Survey

Q119. Are there any other factors that favorably influenced your 2009 ATA Trade Show experience?

Q120. What are the factors?

(Among those who exhibited at the 2009 ATA Trade Show.)

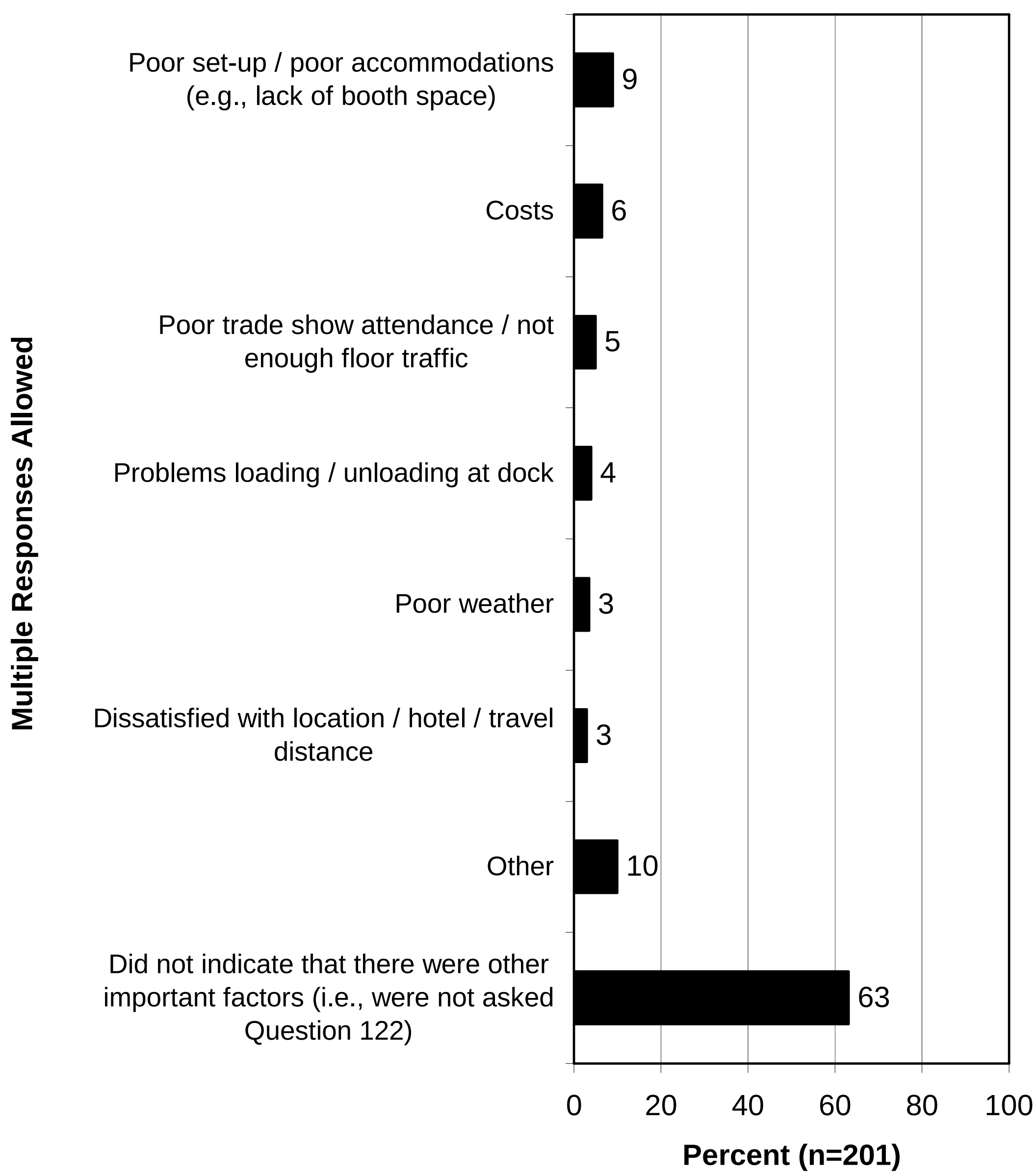


Exhibitors Survey

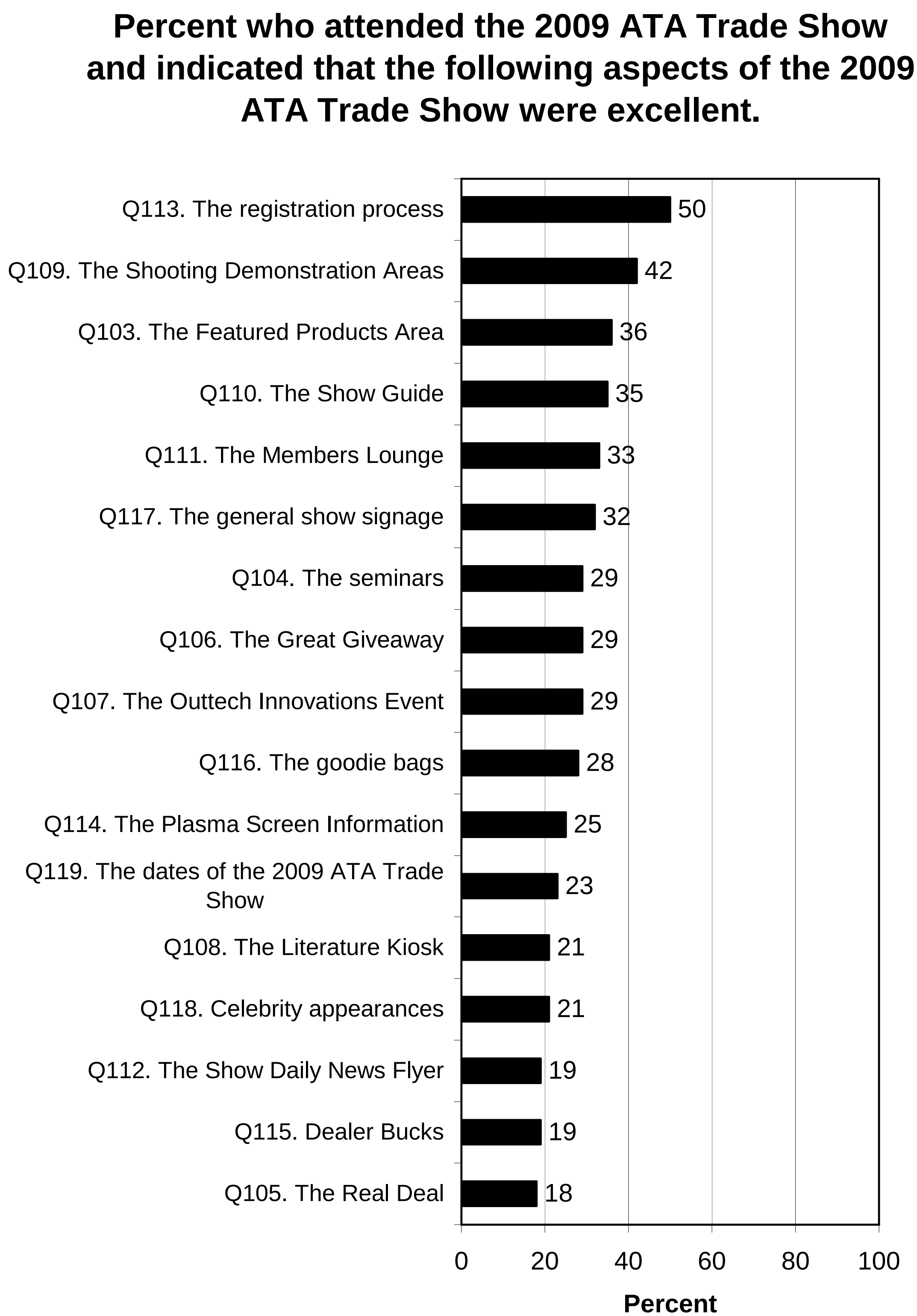
Q121. Are there any other factors that unfavorably influenced your 2009 ATA Trade Show experience?

Q122. What are the factors?

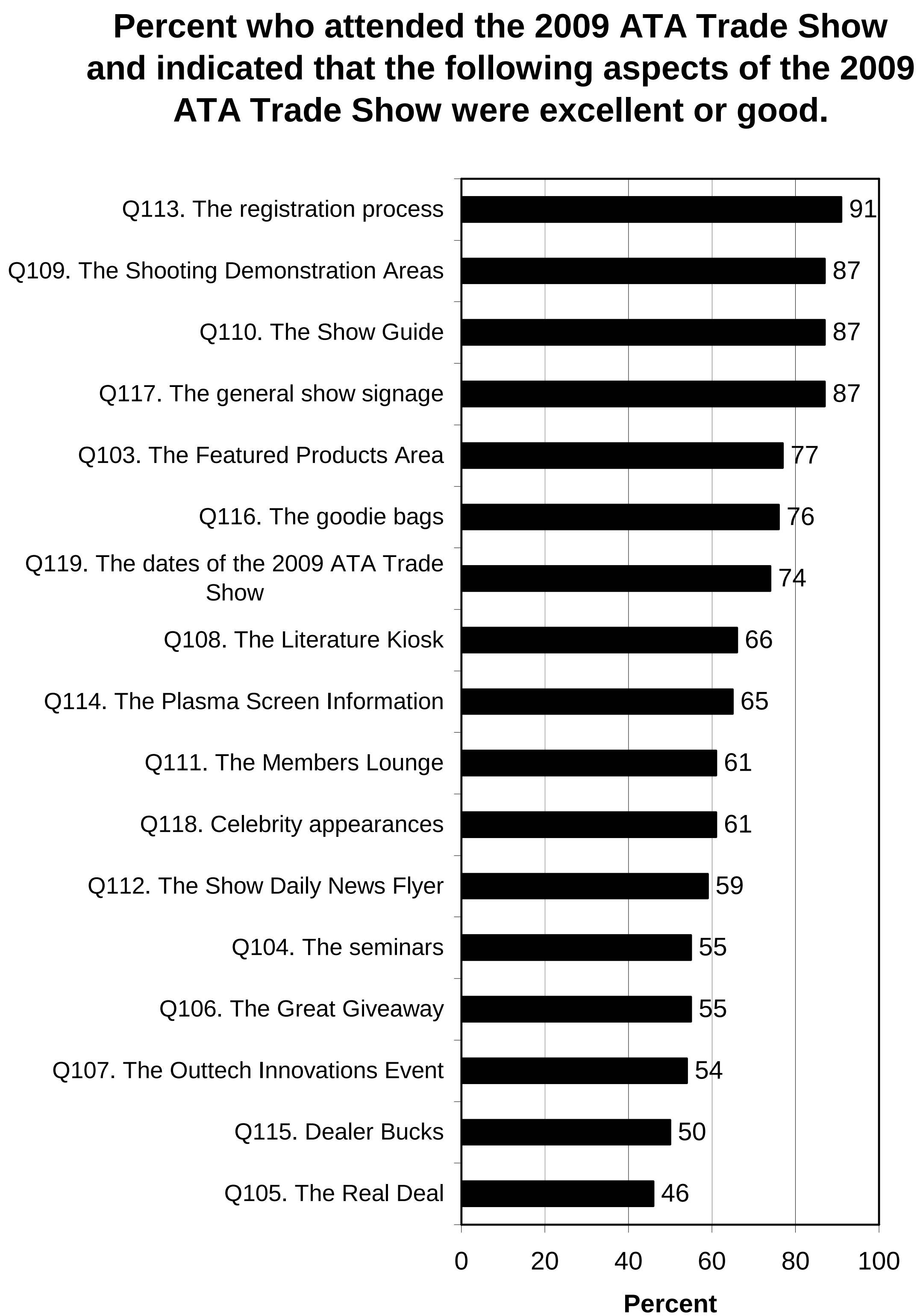
(Among those who exhibited at the 2009 ATA Trade Show.)



Retailers Survey

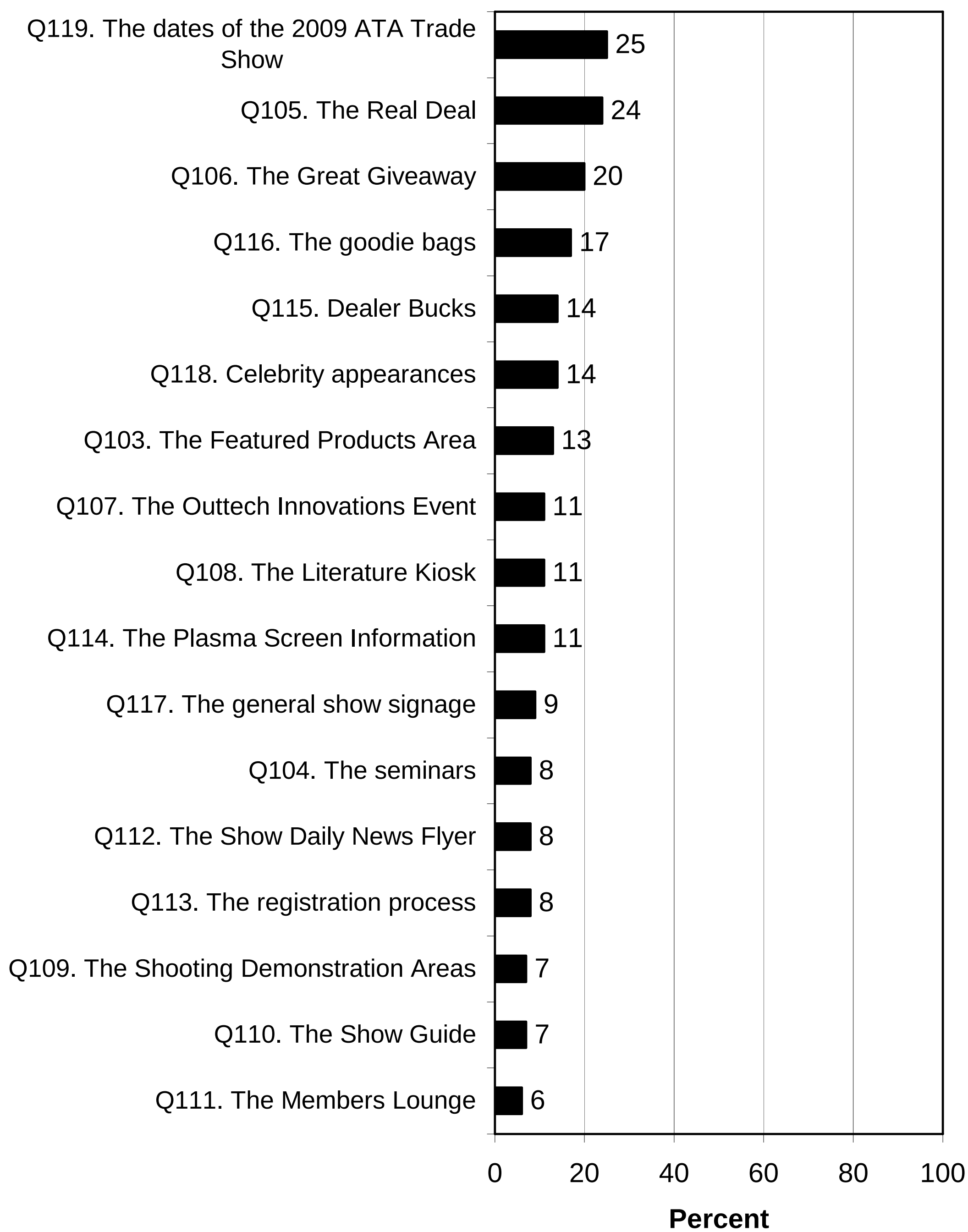


Retailers Survey

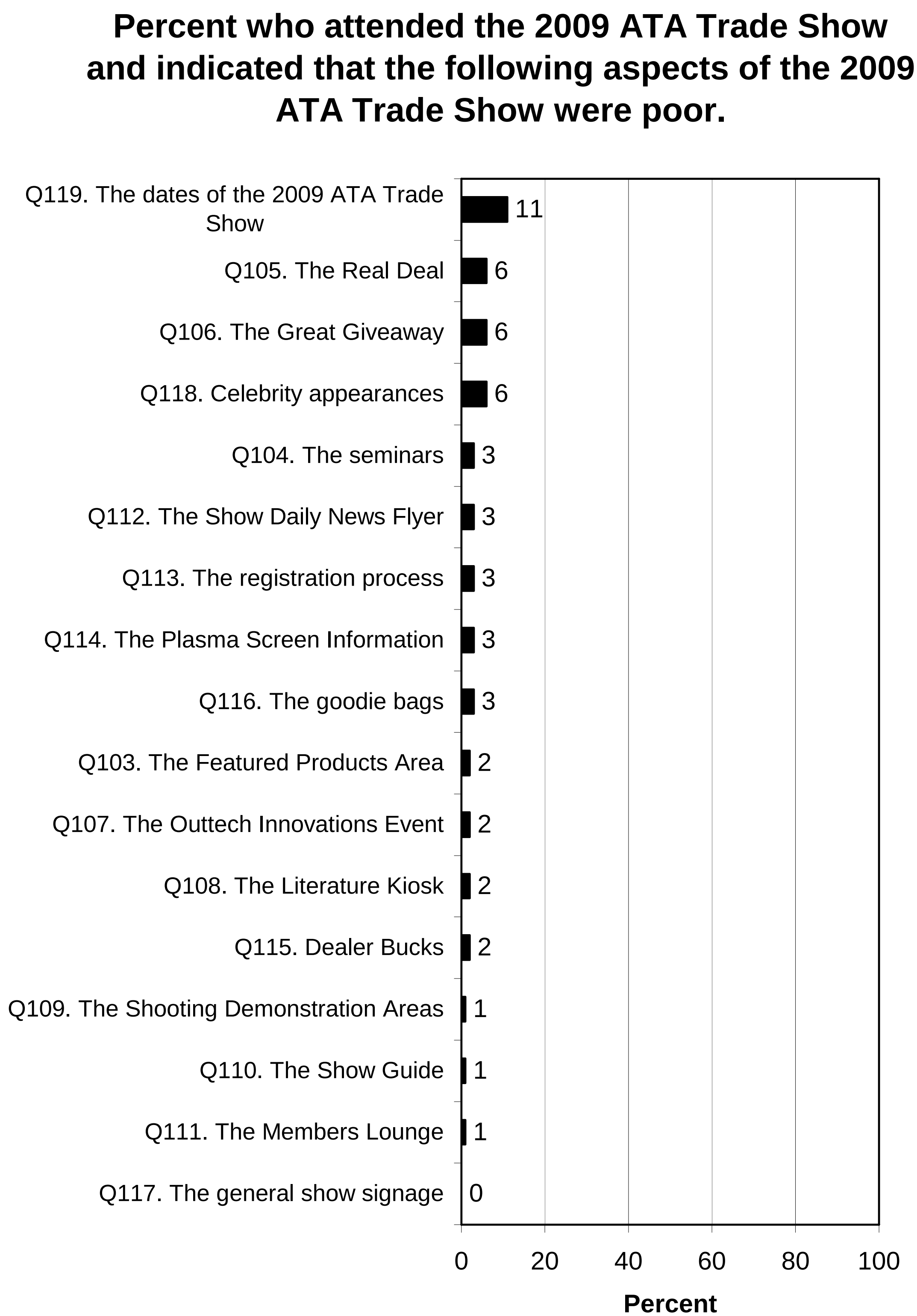


Retailers Survey

Percent who attended the 2009 ATA Trade Show and indicated that the following aspects of the 2009 ATA Trade Show were fair or poor.

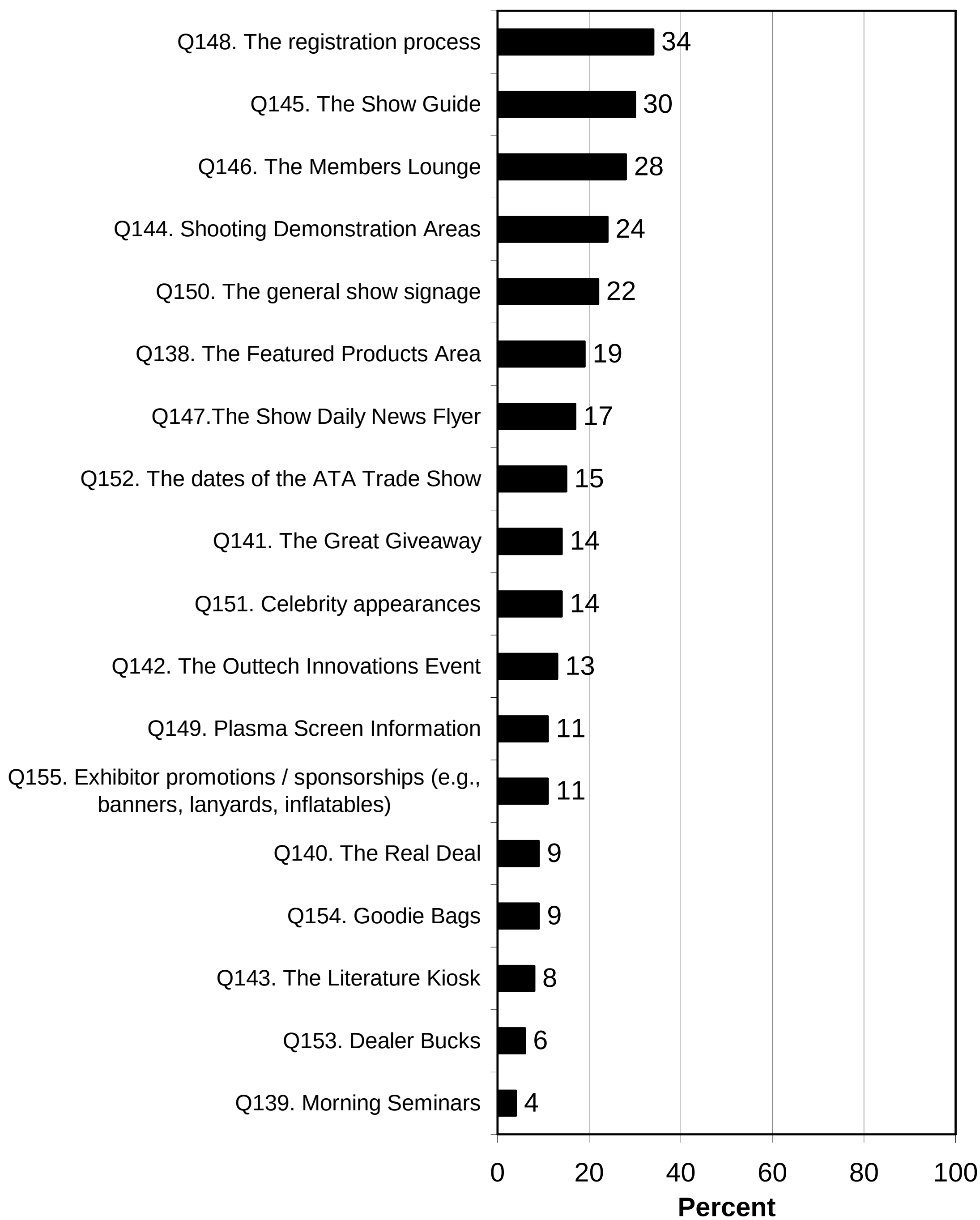


Retailers Survey

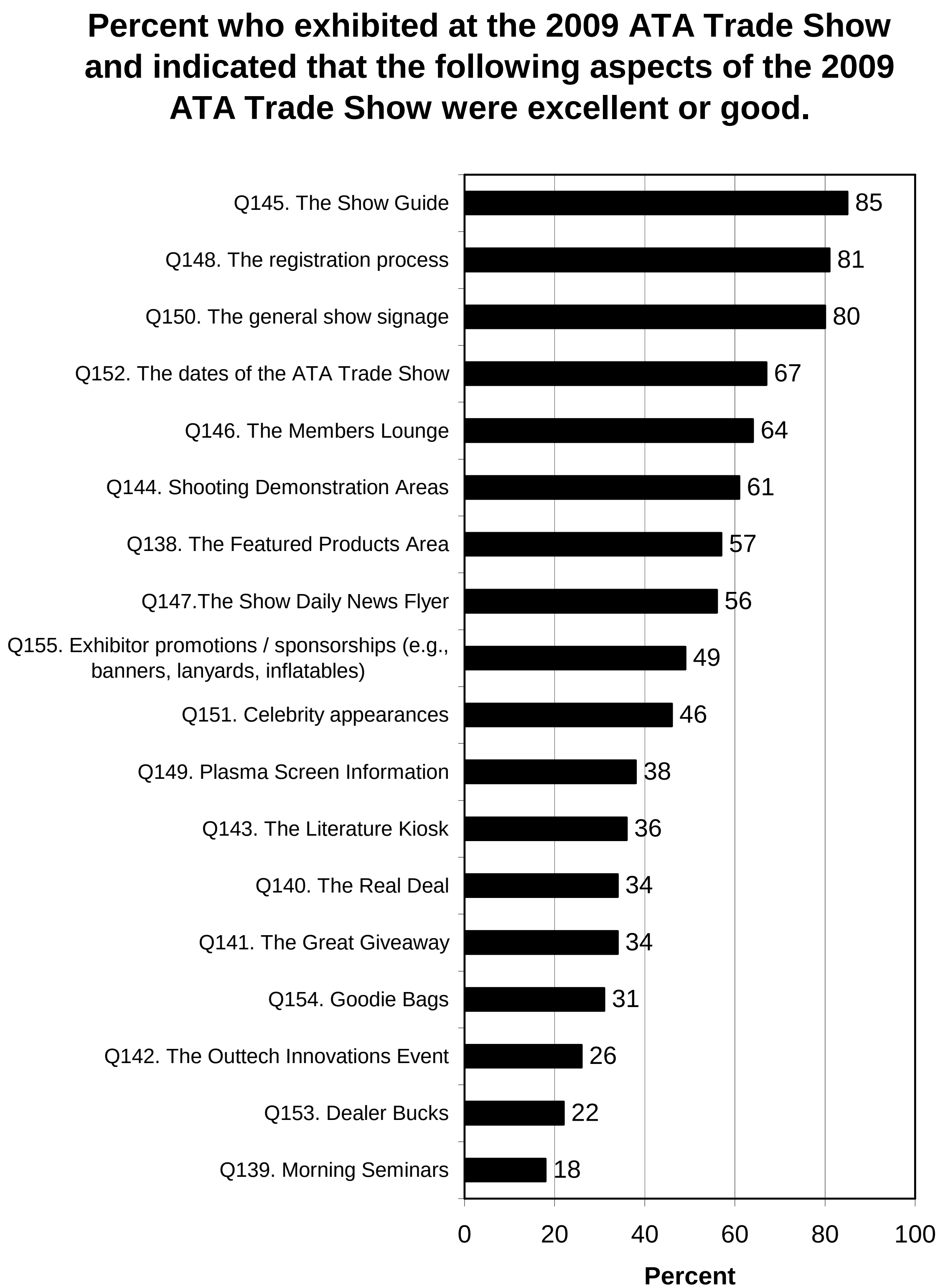


Exhibitors Survey

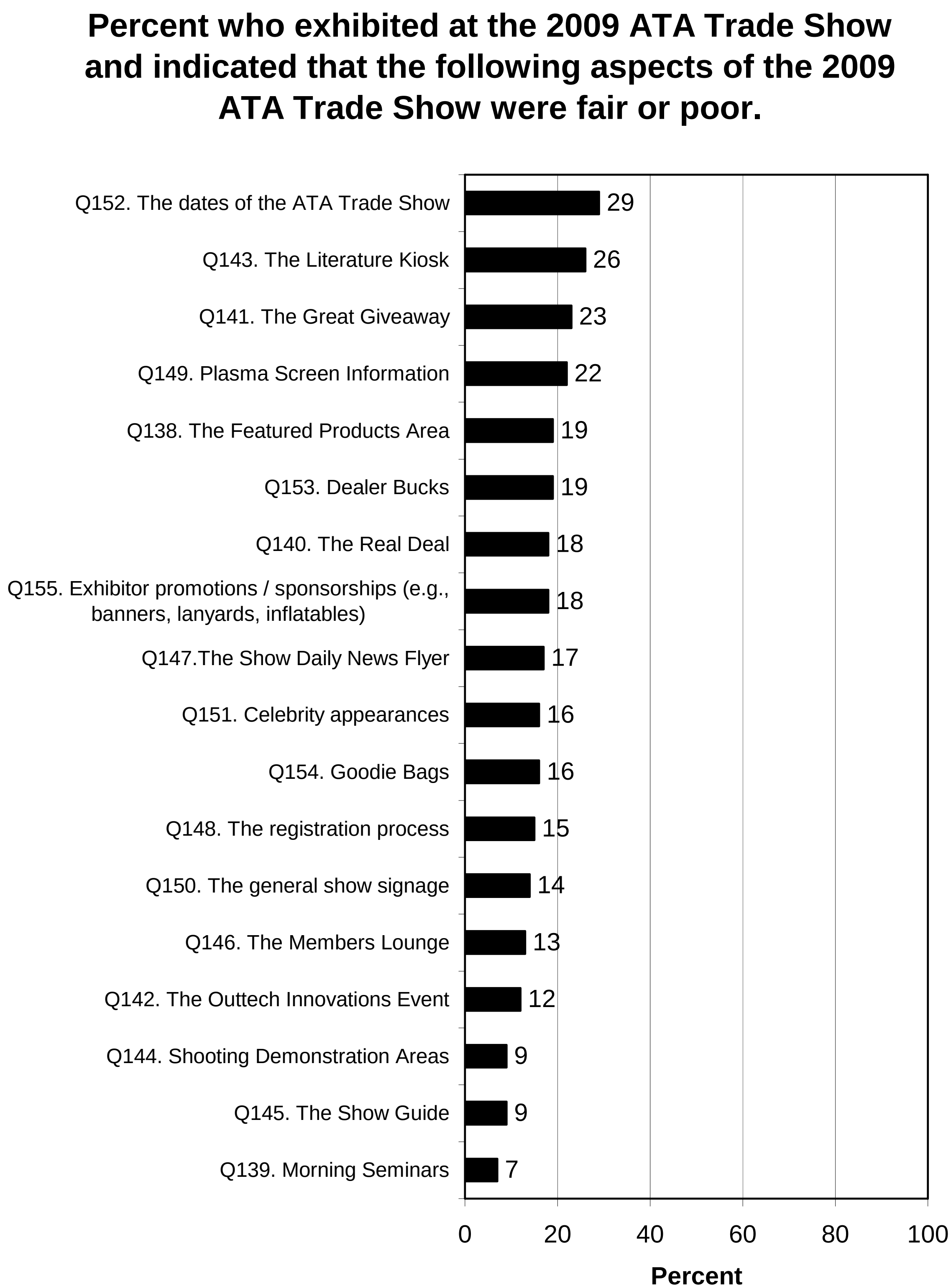
Percent who exhibited at the 2009 ATA Trade Show and indicated that the following aspects of the 2009 ATA Trade Show were excellent.



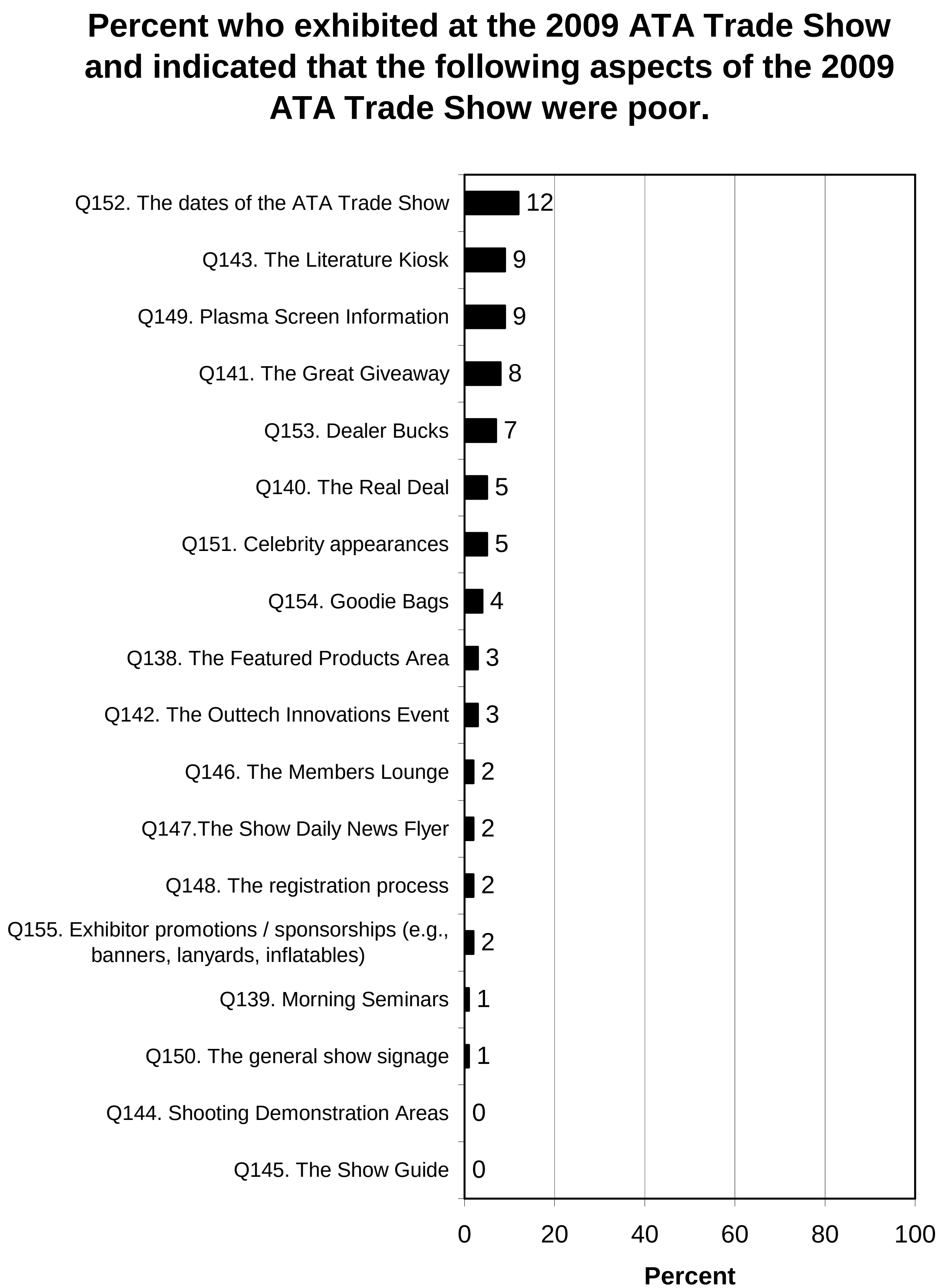
Exhibitors Survey



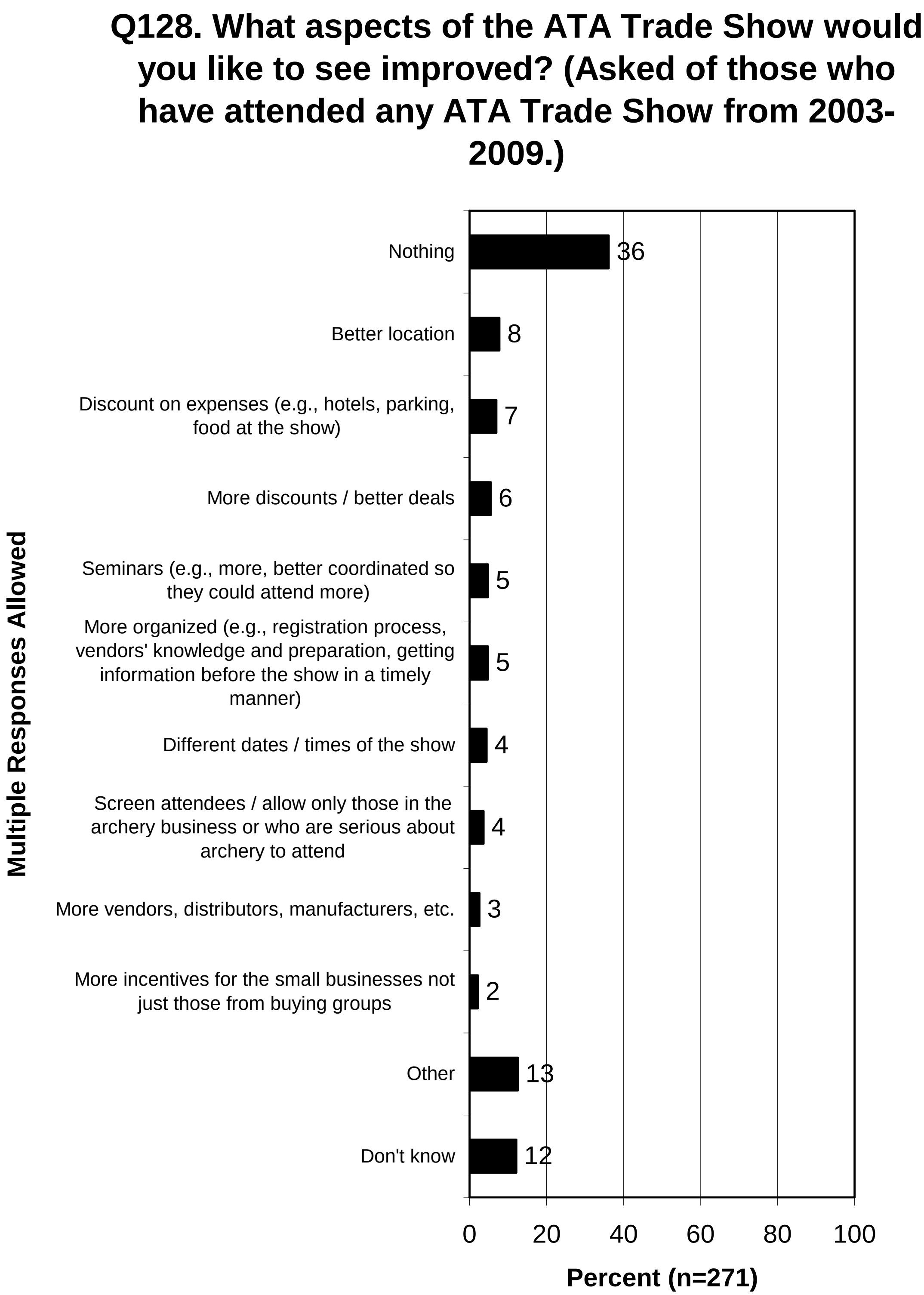
Exhibitors Survey



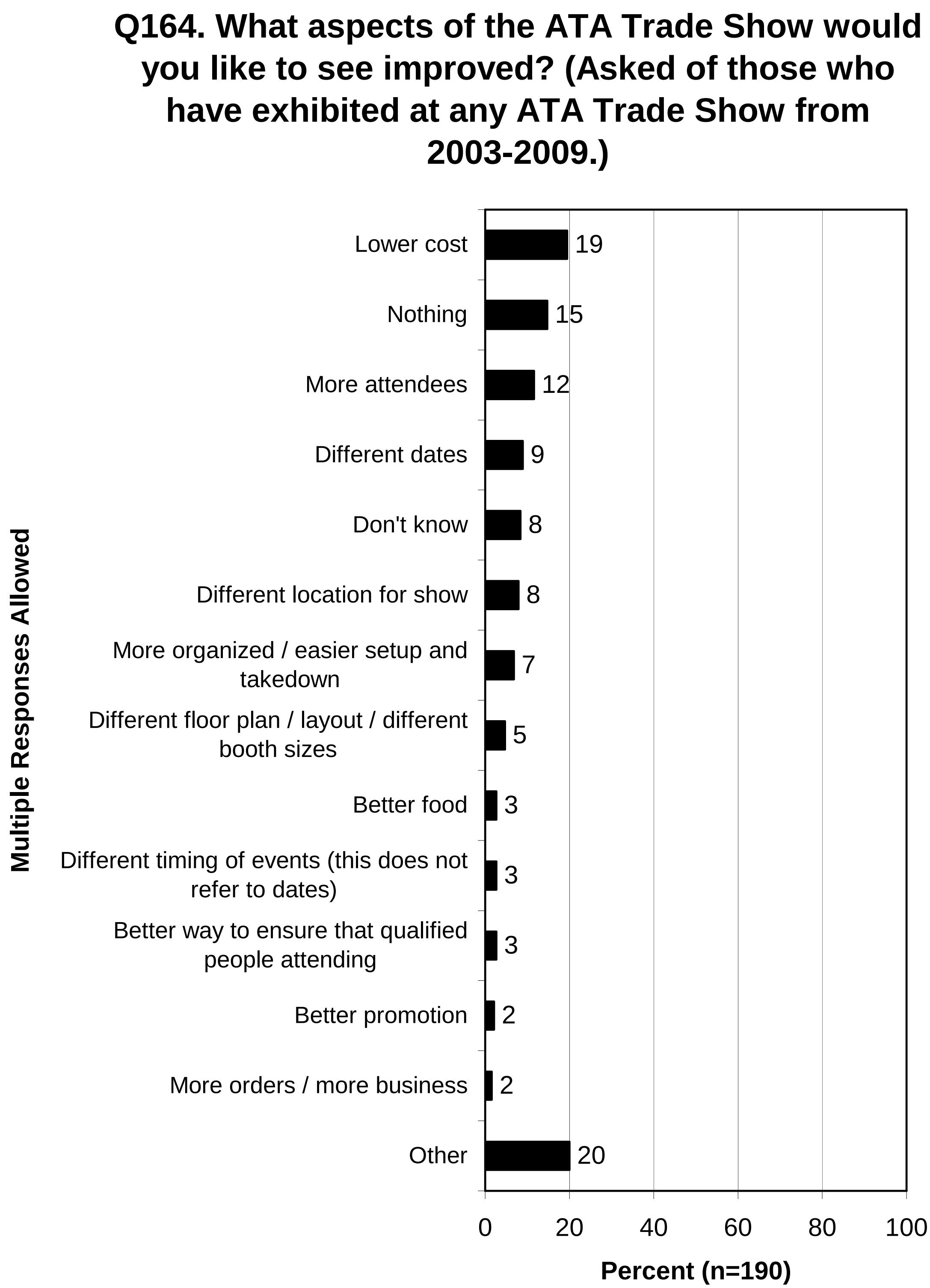
Exhibitors Survey



Retailers Survey



Exhibitors Survey

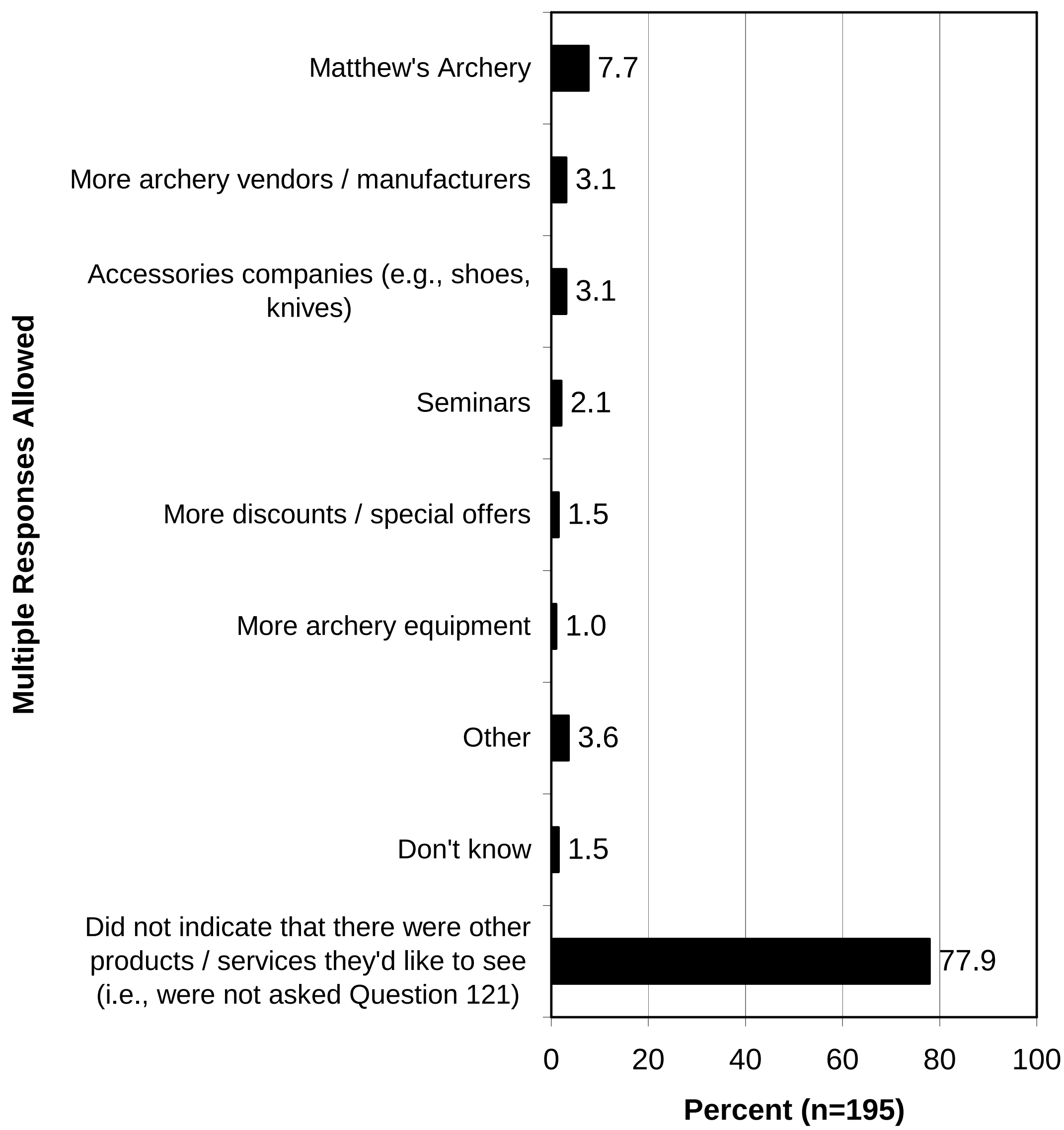


Retailers Survey

Q120. Were there any products or services not at the 2009 show that you'd like to see, or are there any products or services that you'd like to see more of?

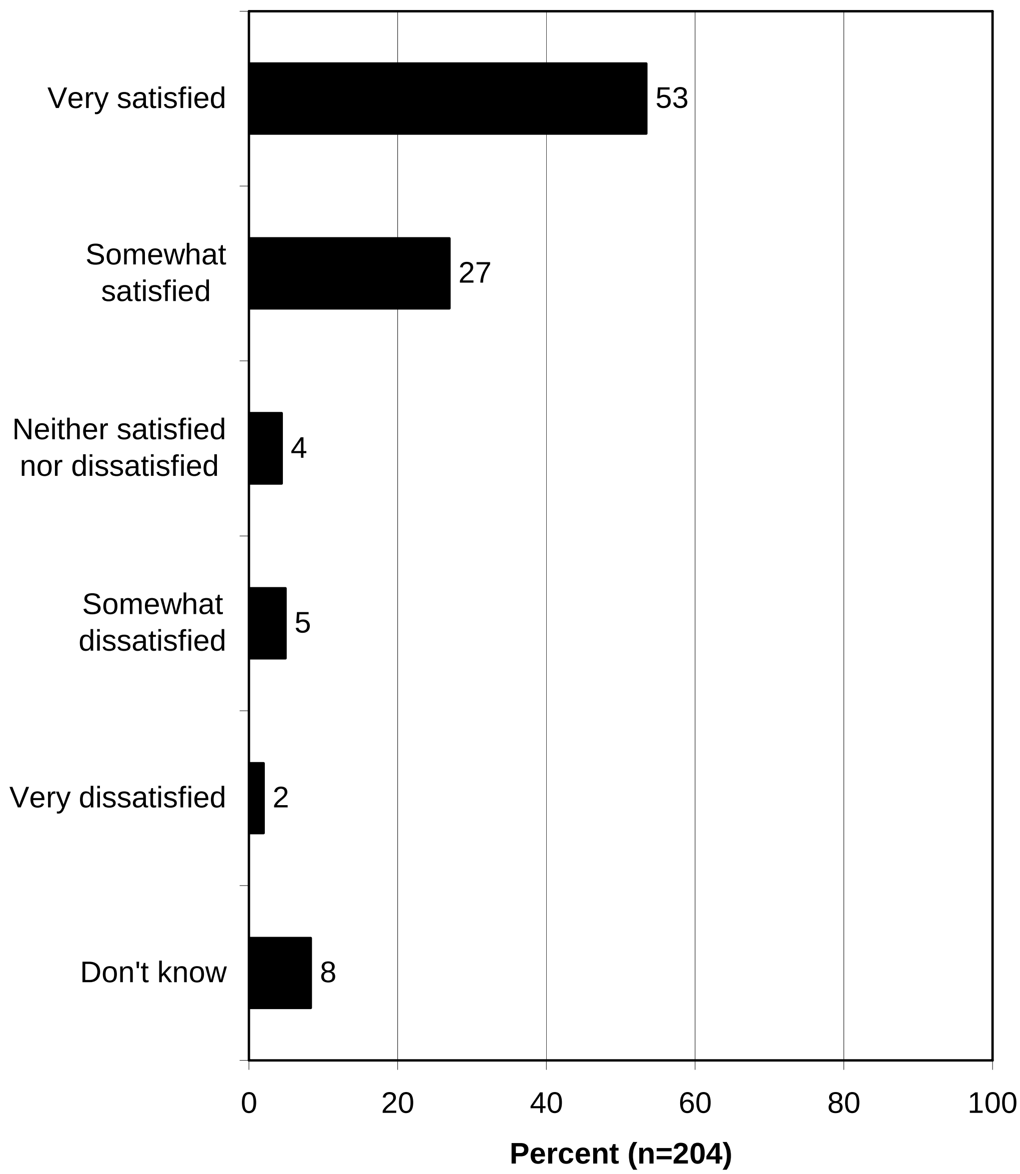
Q121. What are the products or services?

(Among those who attended the 2009 ATA Trade Show.)

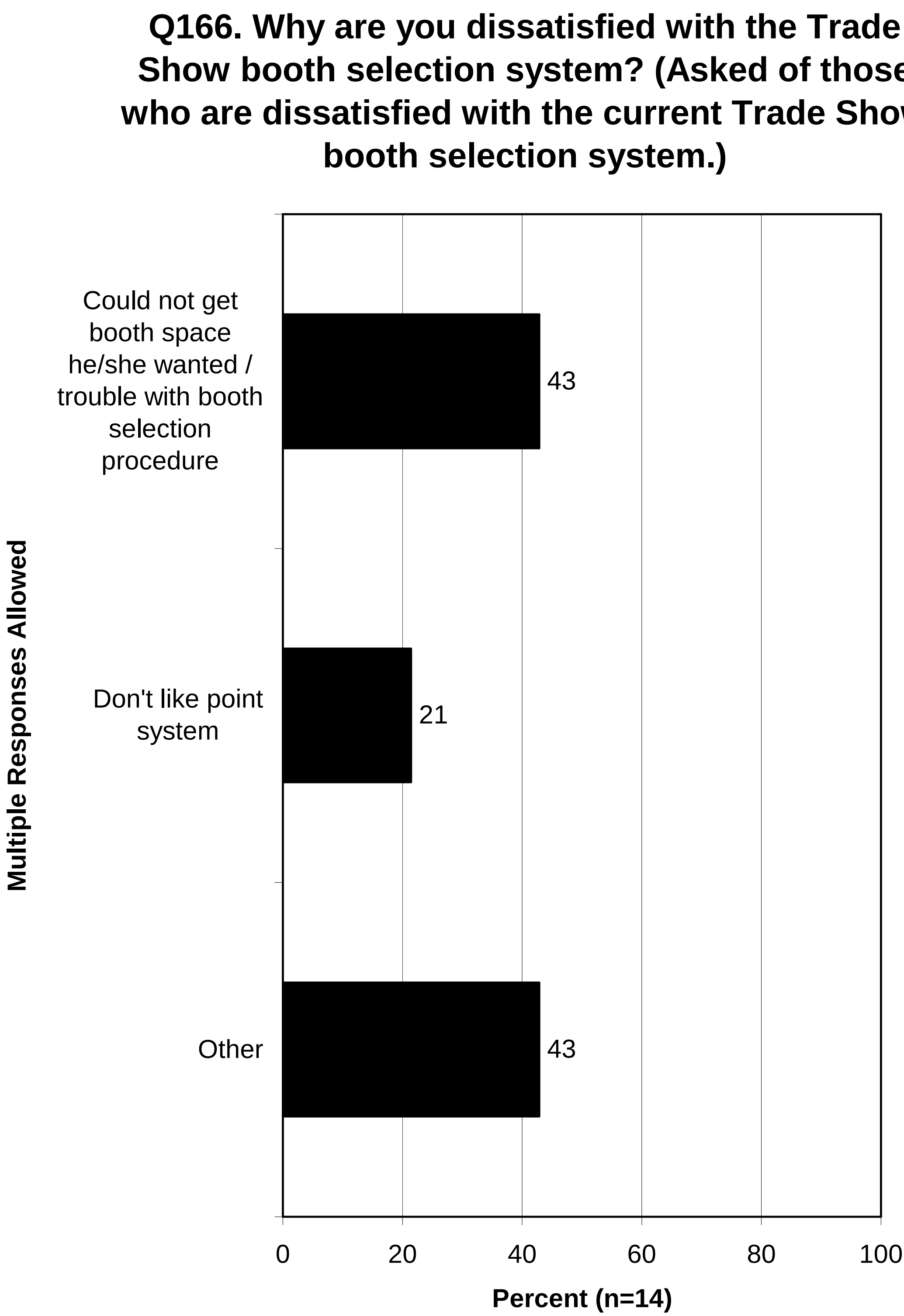


Exhibitors Survey

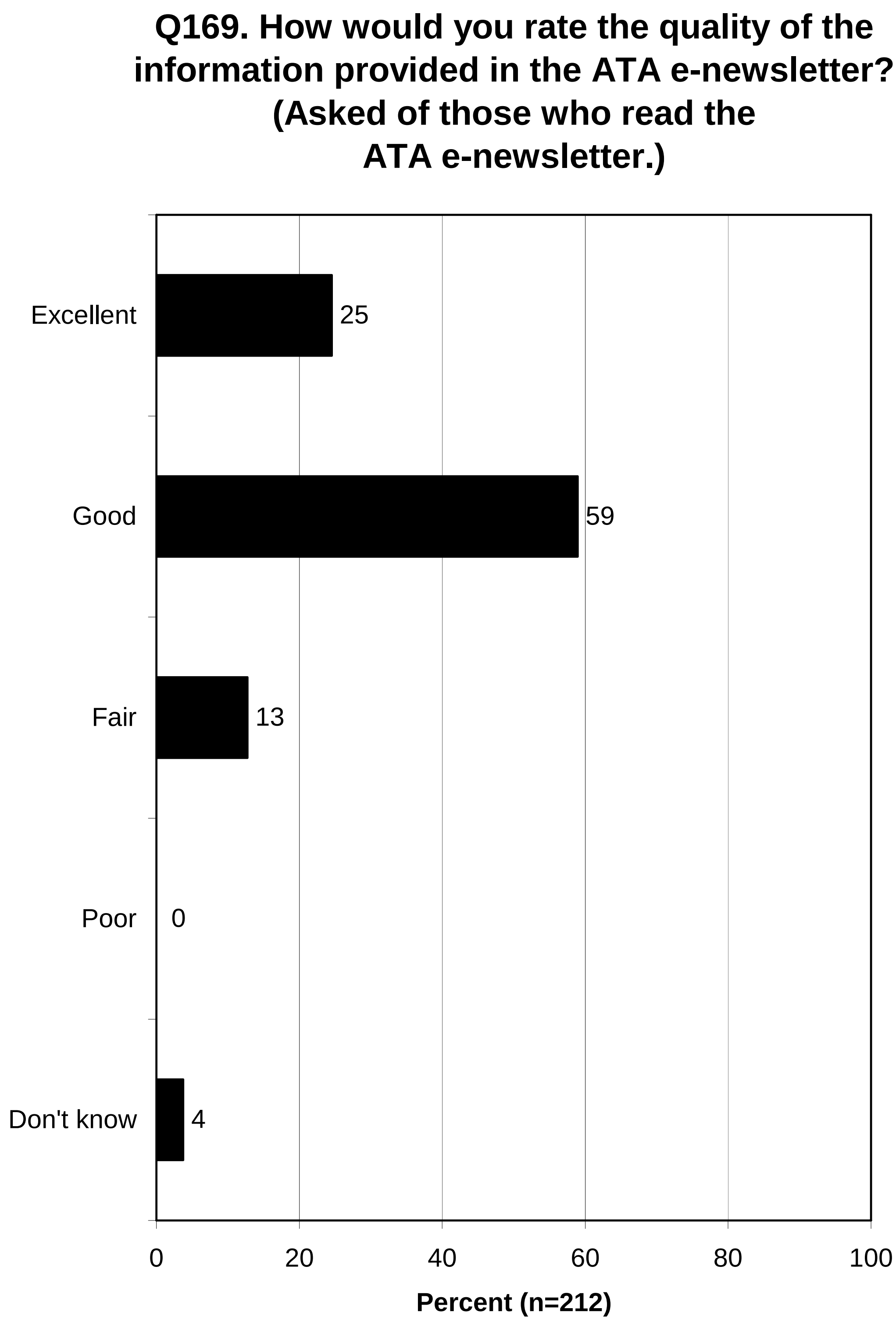
Q165. Currently, exhibitors select booth space over the phone while looking at an online interactive system. Exhibitors select, in order, based on preference points. How satisfied or dissatisfied are you with the current Trade Show booth selection system?



Exhibitors Survey

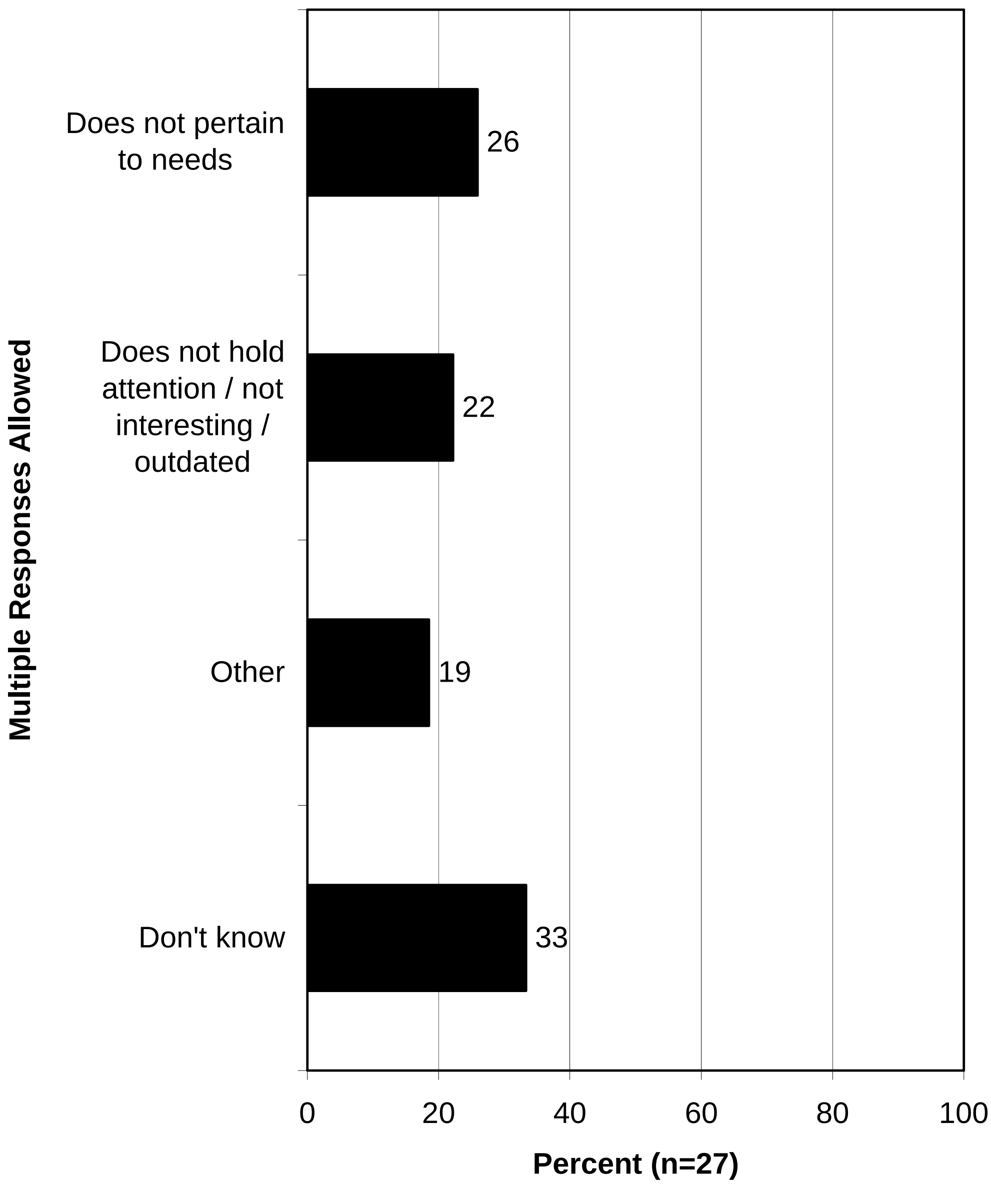


Retailers Survey

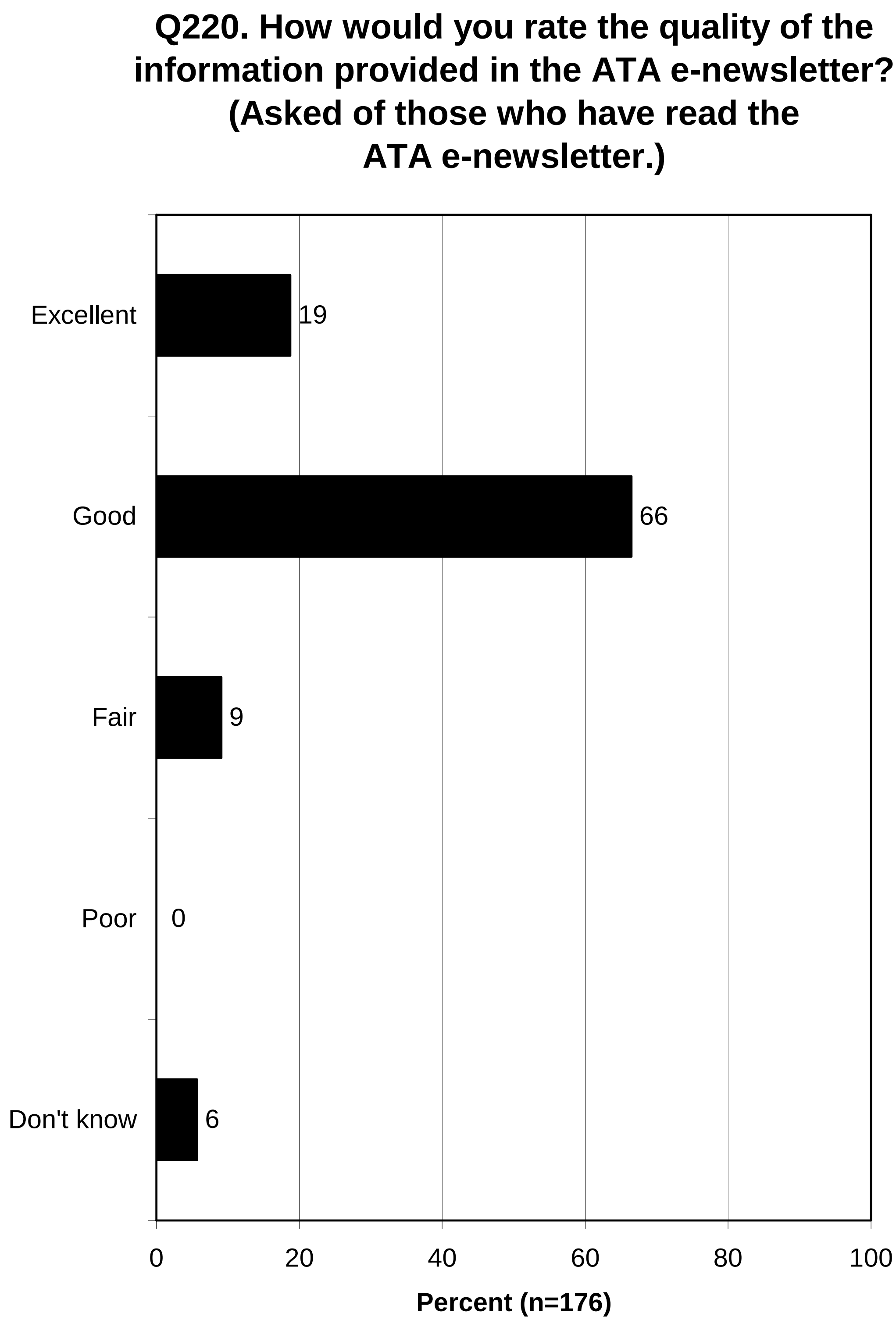


Retailers Survey

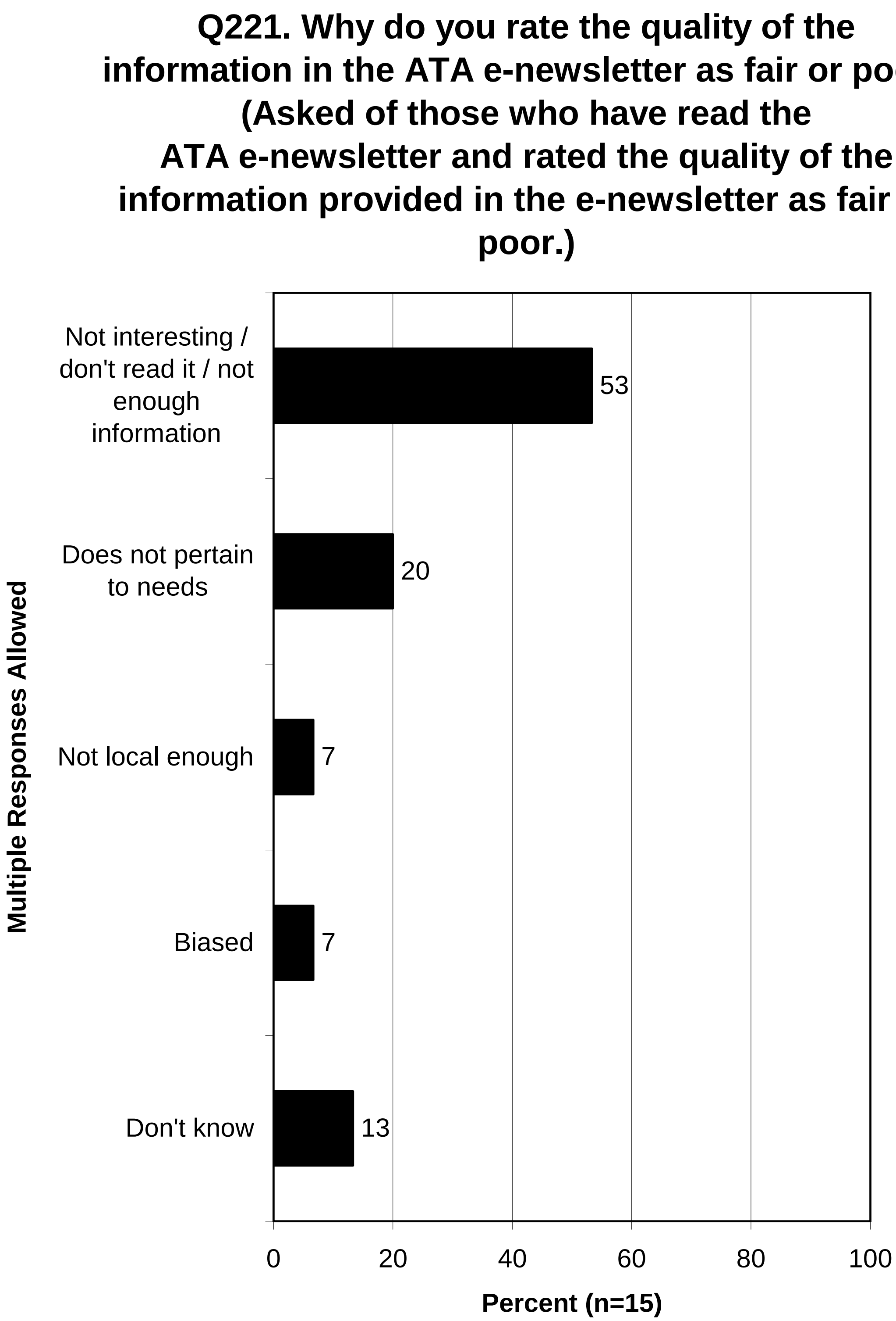
Q170. Why do you rate the quality of the information in the ATA e-newsletter as fair or poor? (Asked of those who have read the ATA e-newsletter, and rates the quality of the information in the ATA e-newsletter as fair or poor.)



Exhibitors Survey

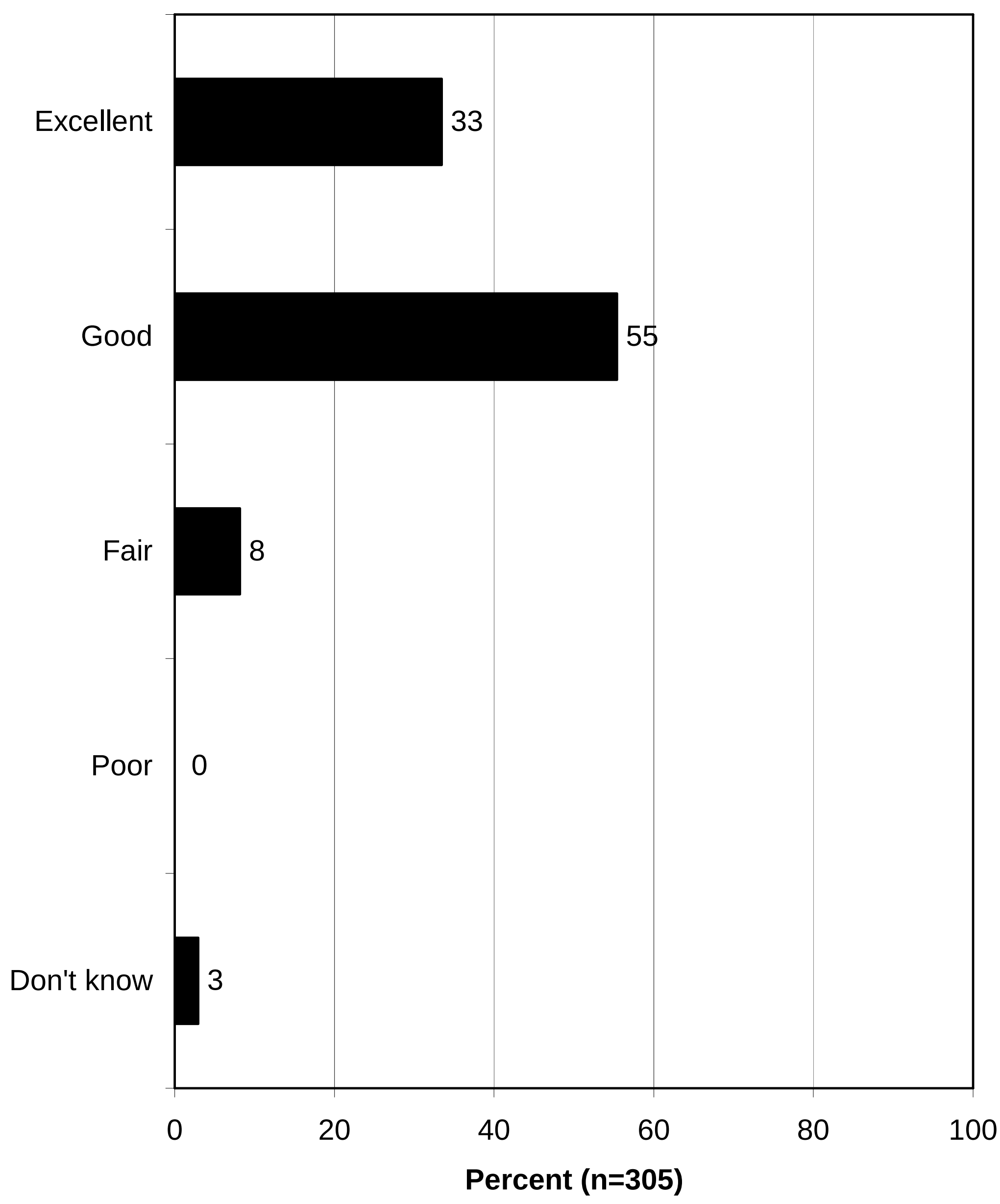


Exhibitors Survey



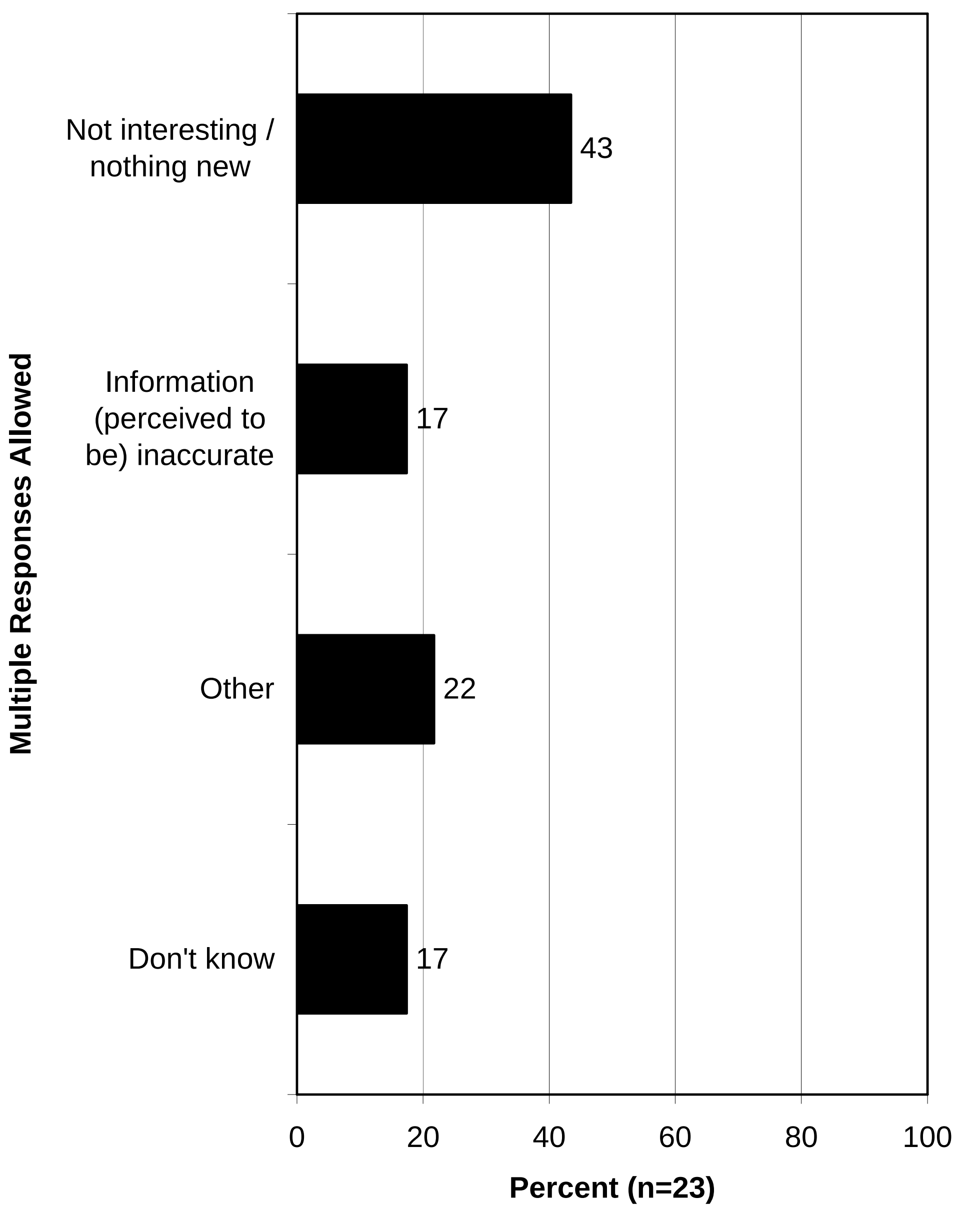
Retailers Survey

Q173. How would you rate the quality of the information in ATA's monthly magazine columns? (Asked of those who read the ATA's monthly columns in such magazines as Inside Archery, ArrowTrade, and Archery Business.)



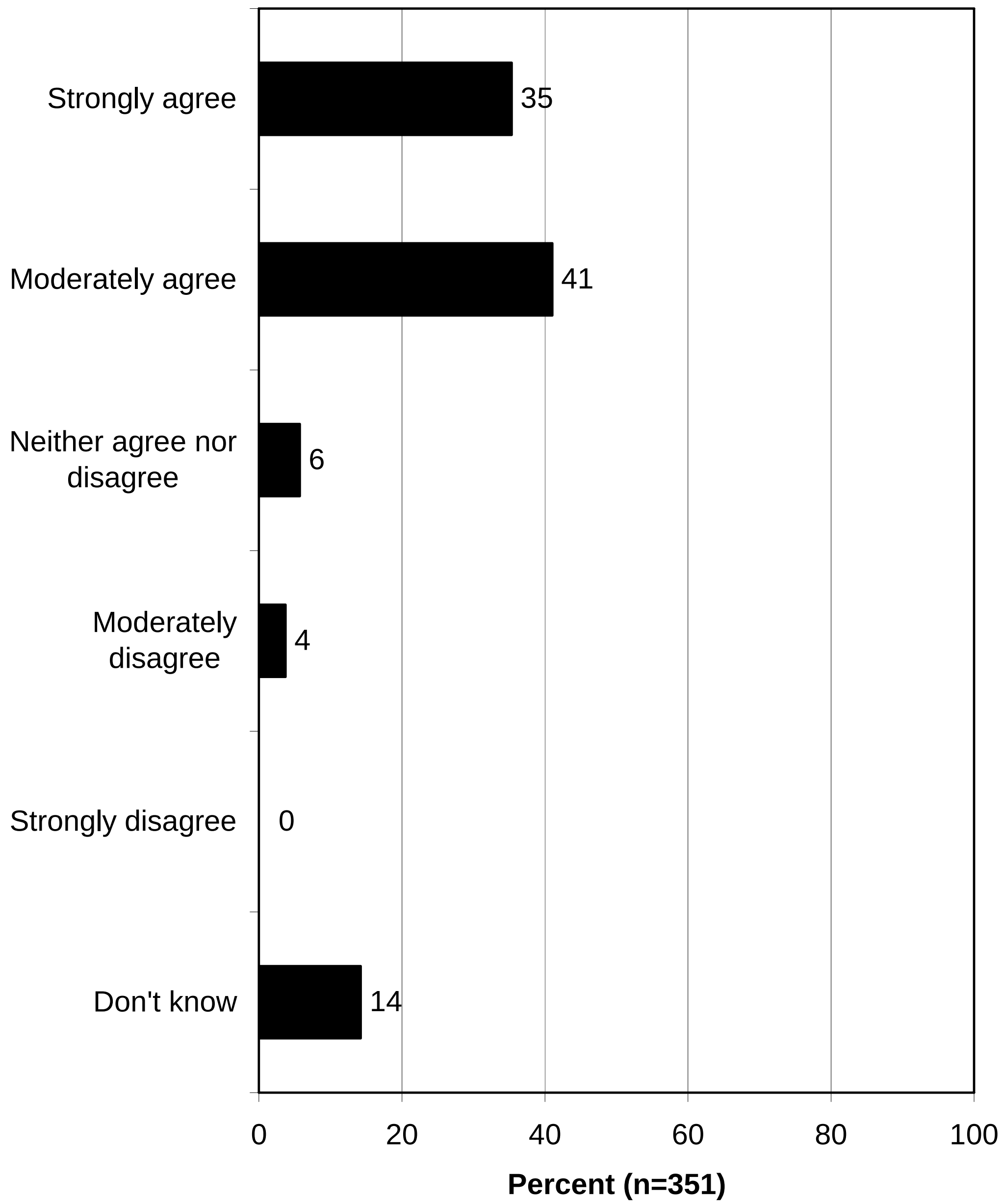
Retailers Survey

Q174. Why do you rate the quality of the information in ATA's monthly magazine columns as fair or poor? (Asked of those who have read the ATA's monthly columns and who rate the quality of the information in ATA's monthly magazine columns as fair or poor.)



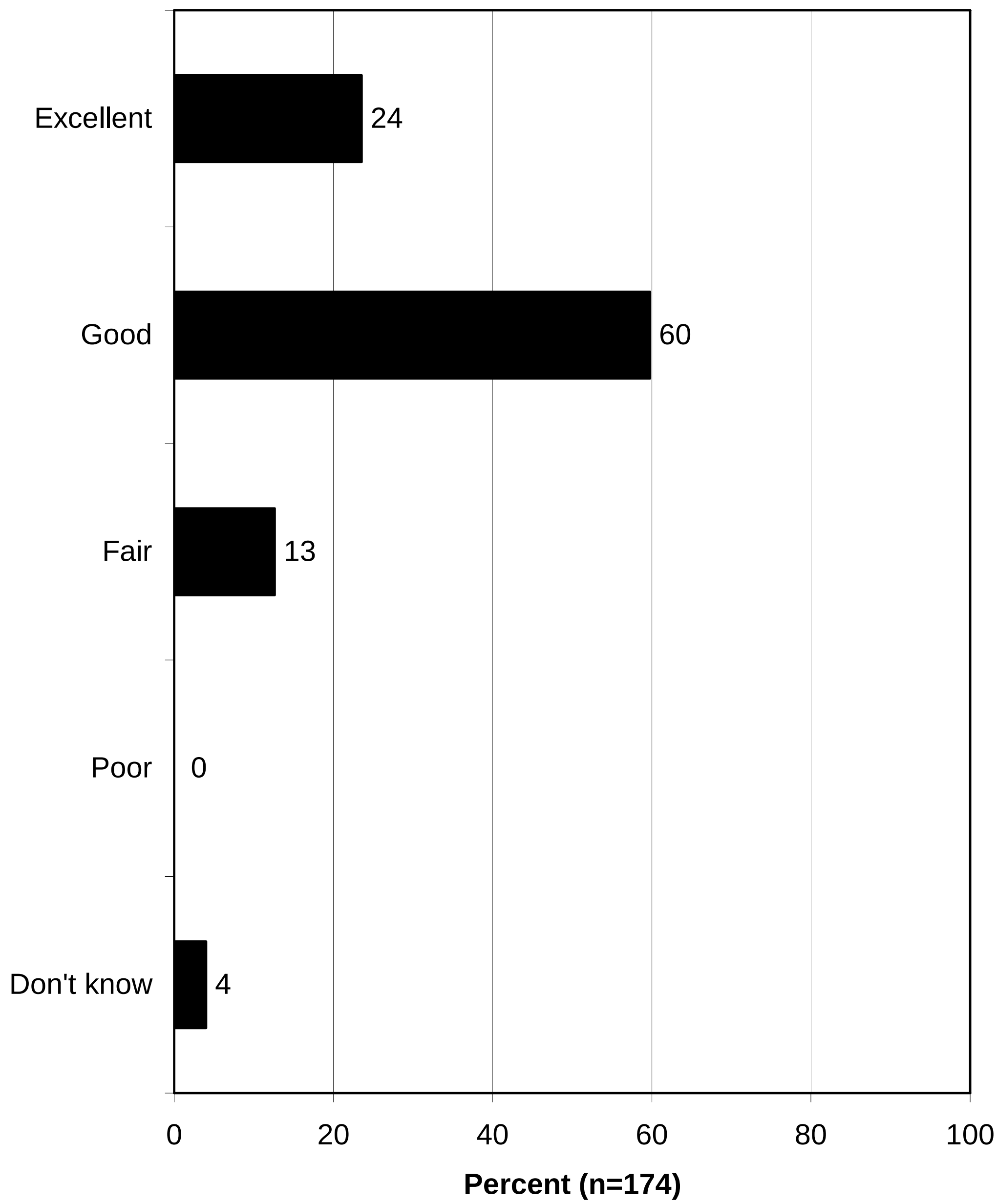
Retailers Survey

Q175. Do you agree or disagree that the ATA's monthly columns in the Inside Archery, ArrowTrade, and Archery Business magazines usually feature topics that meet your company's needs?



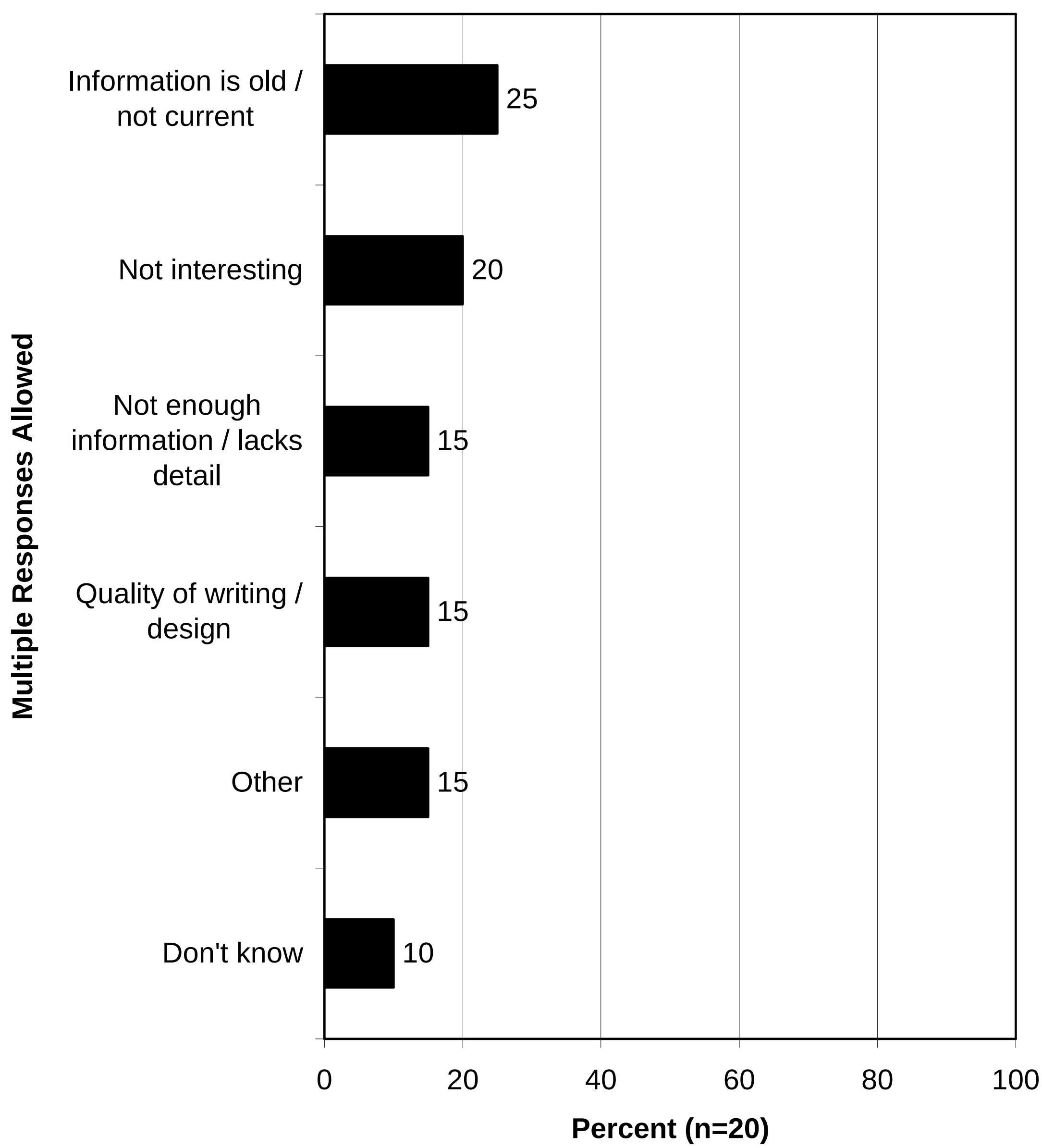
Exhibitors Survey

Q226. How would you rate the quality of the information in ATA's monthly magazine columns? (Asked of those who have read the ATA's monthly columns in such magazines as Inside Archery, ArrowTrade, and Archery Business.)



Exhibitors Survey

Q227. Why do you rate the quality of the information in ATA's monthly magazine columns as fair or poor? (Asked of those who have read the ATA's monthly columns and who rate the quality of the information in ATA's monthly magazine columns as fair or poor.)



SOURCES OF INFORMATION ABOUT THE ATA AND THE TRADE SHOW

- Both surveys asked how respondents preferred to receive information about the ATA Trade Show: by email, fax, or mail.
  - Retailers are about evenly divided between mail (50%) or email (44%); few want information by fax (4%).
  - Exhibitors, on the other hand, almost universally prefer email (87%) over mail (12%) or fax (less than 1%).

- Nearly all retailers surveyed (94%) indicate that they have access to the Internet.
  - Of those with access, nearly all (90%) have highspeed access rather than dial-up (9%).
  - The majority of those with Internet access use it to find information related to the archery industry or related to their business frequently (64%), and another 20% use it sometimes (a sum of 84%). Meanwhile, only 16% say they use it rarely or never.

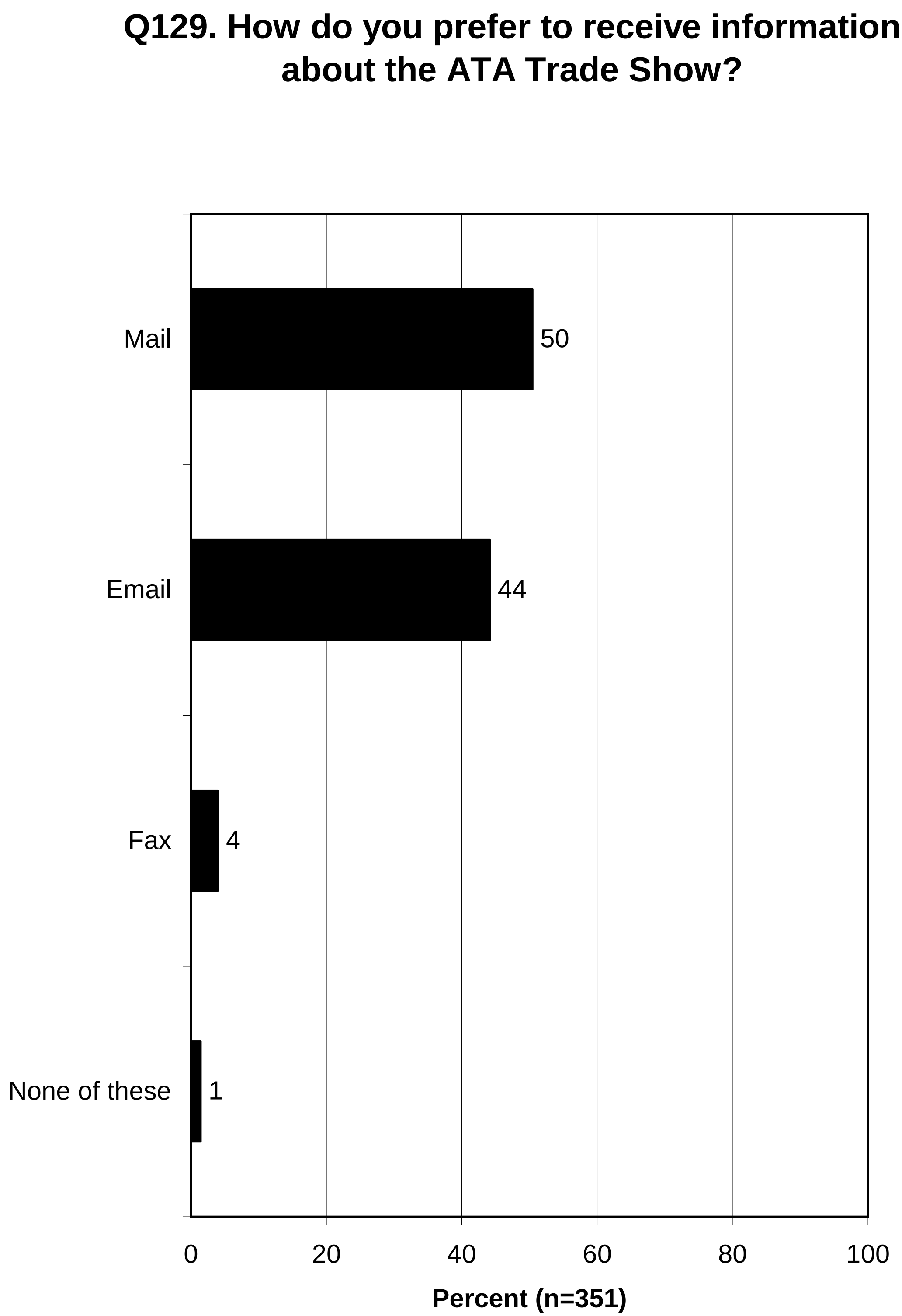
- Both surveys asked about the ArcheryTrade.org website.
  - The majority of retailers do *not* often visit the ArcheryTrade.org website: 46% never visit it, and 31% rarely visit it (a sum of 77%); only 22% sometimes or frequently visit it.
    - Those who visited it at least rarely were asked what information/services they used on the website. They most commonly obtained information about the Trade Show itself and/or industry updates/new product information.
    - When retailers were asked what additional information they would like for the ArcheryTrade.org website to have, their most commonly named items are information on product availability/buyers directory and more technical information about products.
  - Exhibitors are split on visitation to the ArcheryTrade.org website: 45% frequently or sometimes visit it, while 54% rarely or never do so. Note that the middle answers (sometimes or rarely) far exceeded the extremes (frequently or never).
    - Information/services most commonly obtained include information about the show (the top answer by far), contact information, and industry updates.

    - Additional information/services that exhibitors want include contact information/member lists/dealers lists, information of help in running business/marketing, links to other websites, and statistics/technical data/archives of research.

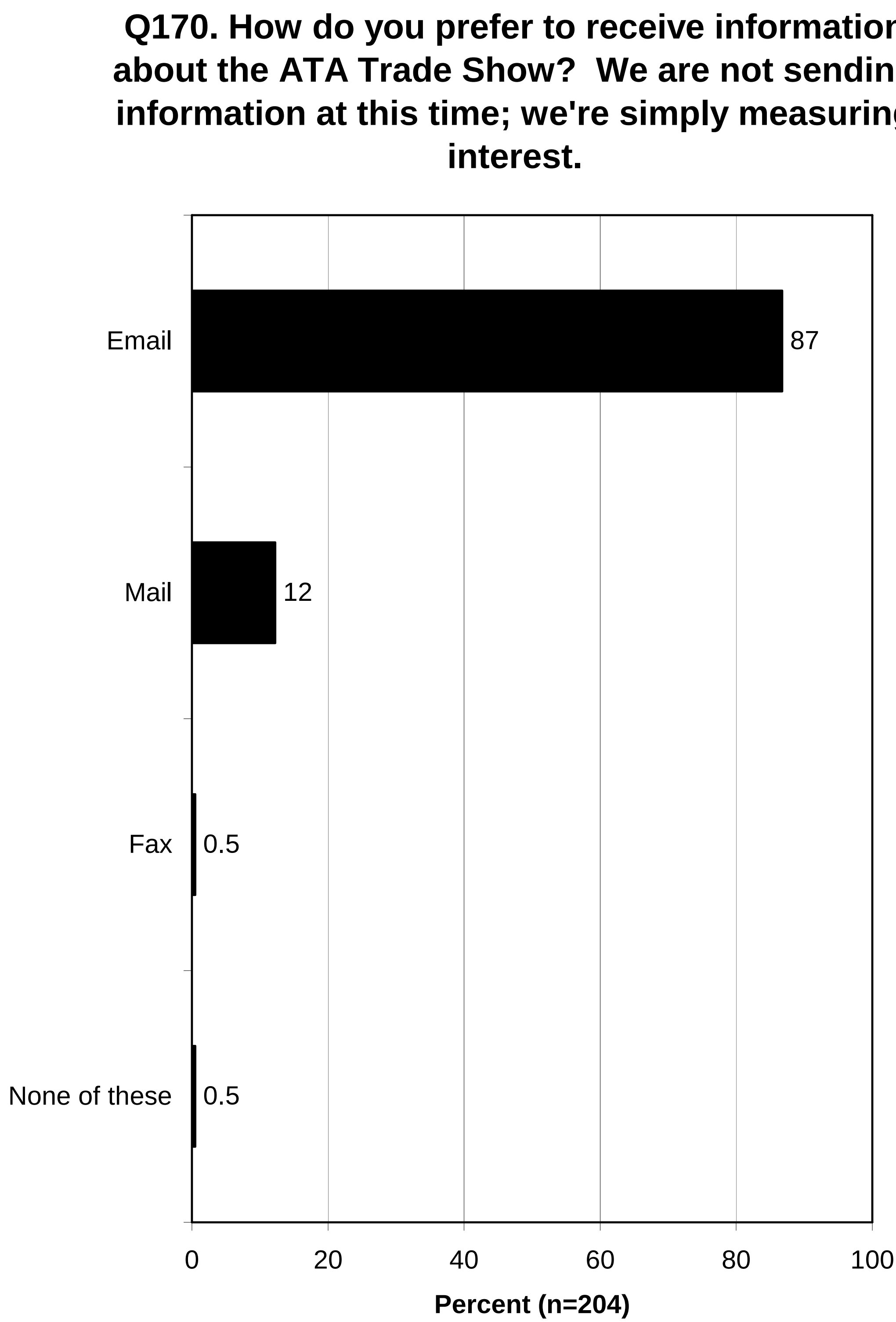
- Both surveys asked about the ATA e-newsletter.
  - Half of retailers indicate that they read the ATA e-newsletter frequently (30%) or sometimes (20%). Meanwhile, 36% never do so, and 10% only rarely do so.
    - Additional topics retailers say that they would be interesting in seeing in the ATA e-newsletter include industry updates, new products, and information about manufacturers and dealers.
  - A majority of exhibitors indicate that they read the ATA e-newsletter frequently (44%) or sometimes (24%), for a sum of 68%. Meanwhile, 32% rarely or never do so.
    - Additional topics exhibitors say that they would be interesting in seeing include information on marketing or the state of the industry, ATA programs and benefits, member lists/dealer lists/manufacturers lists, and new product information.

- Both surveys asked about ATA's monthly columns in such magazines as *Inside Archery*, *ArrowTrade*, and *Archery Business*.
  - A large majority of retailers say that they frequently (56%) or sometimes (21%) read the ATA's monthly columns in magazines (a sum of 77%). Meanwhile, 21% rarely or never do so, about evenly divided between those answers.
    - Additional topics retailers say that they would be interesting in seeing in the columns include technical information about equipment, business-oriented information (e.g., marketing, business regulations), new products, and industry updates.
  - A majority of exhibitors say that they frequently (36%) or sometimes (33%) read the ATA's monthly columns in magazines (a sum of 69%). Meanwhile, 30% rarely or never do so, about evenly divided between those answers.
    - Additional topics exhibitors say that they would be interesting in seeing in the columns include marketing information/industry updates, new products/testing, ATA programs and benefits, and legal/legislative/regulatory information.

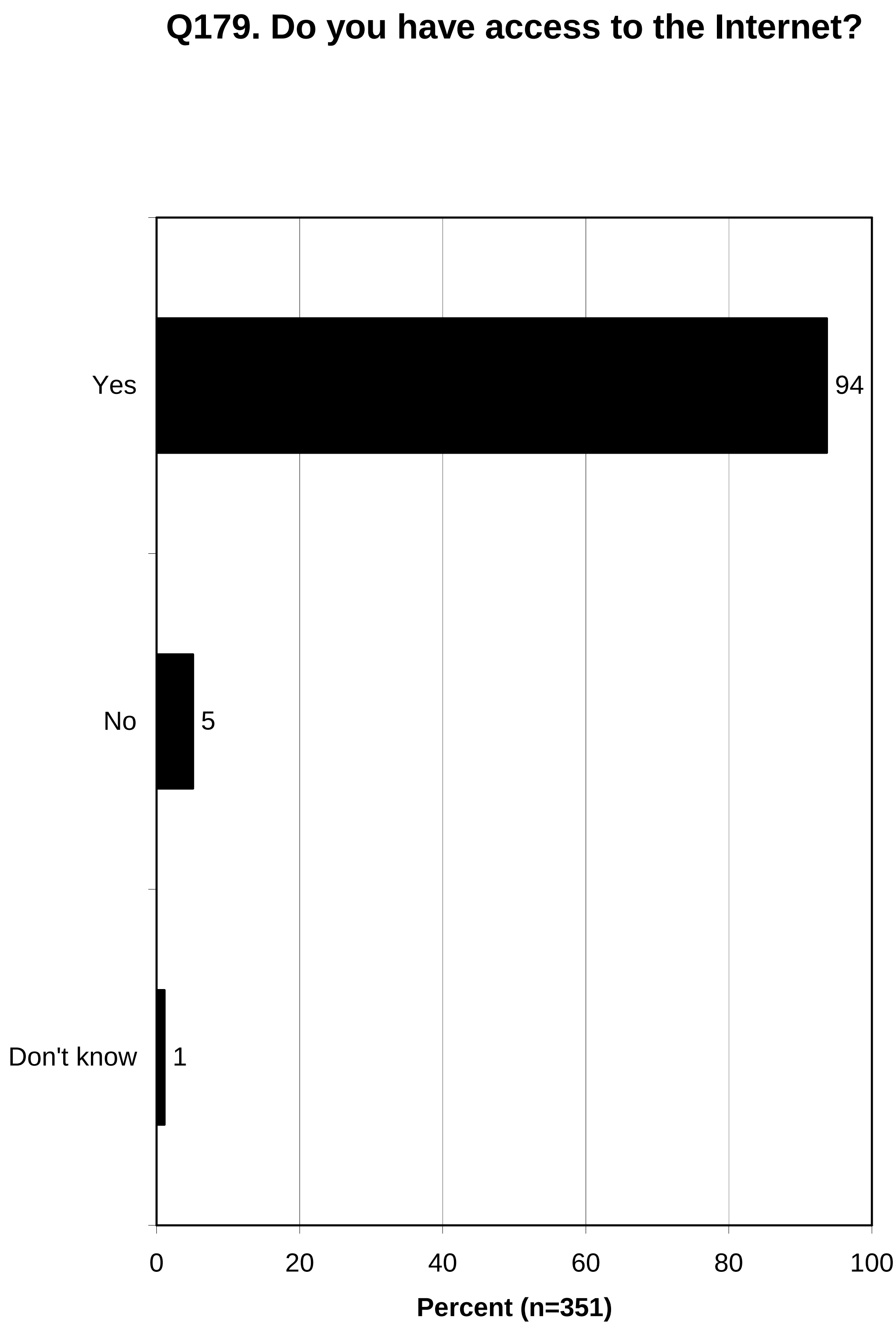
Retailers Survey



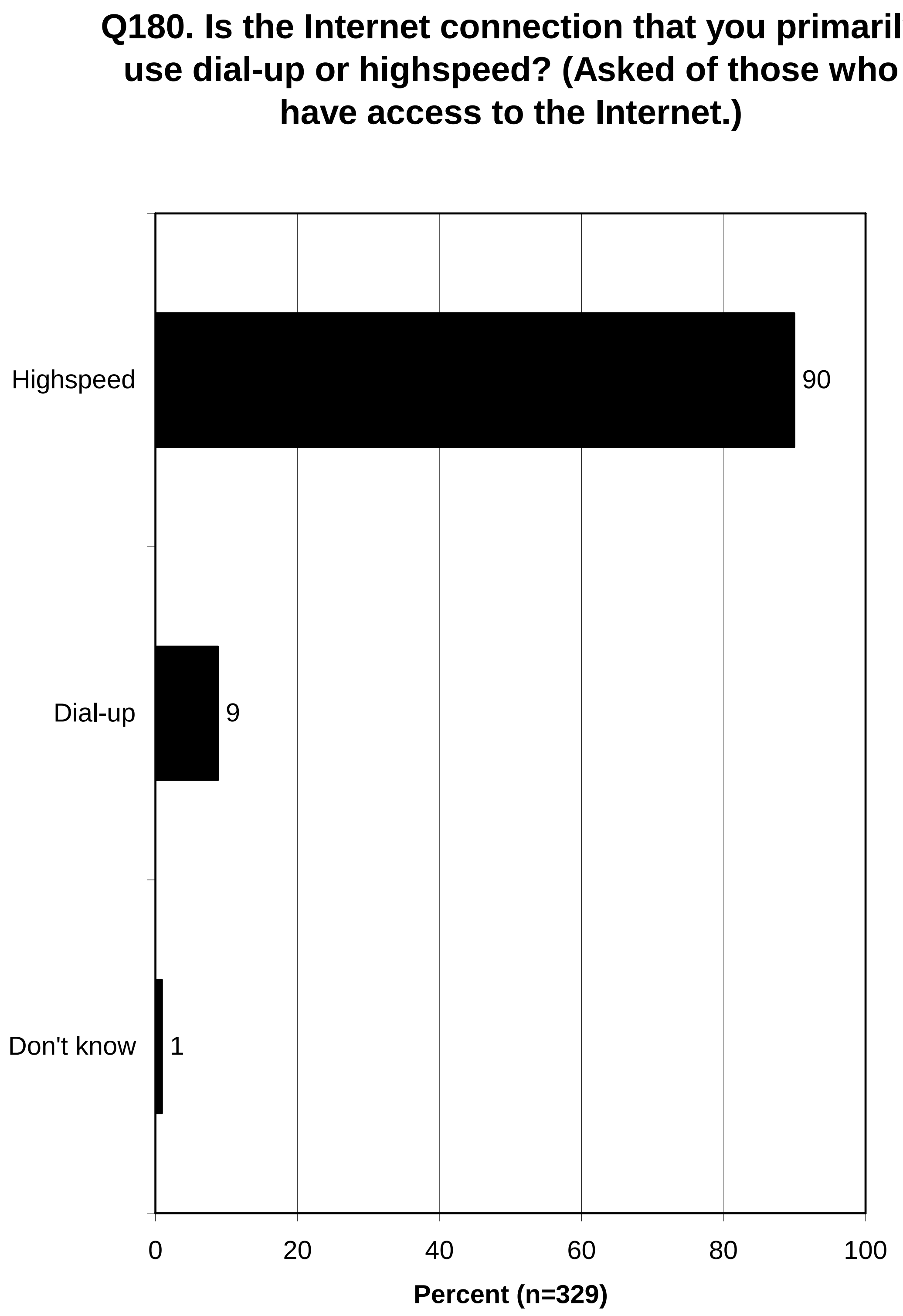
Exhibitors Survey



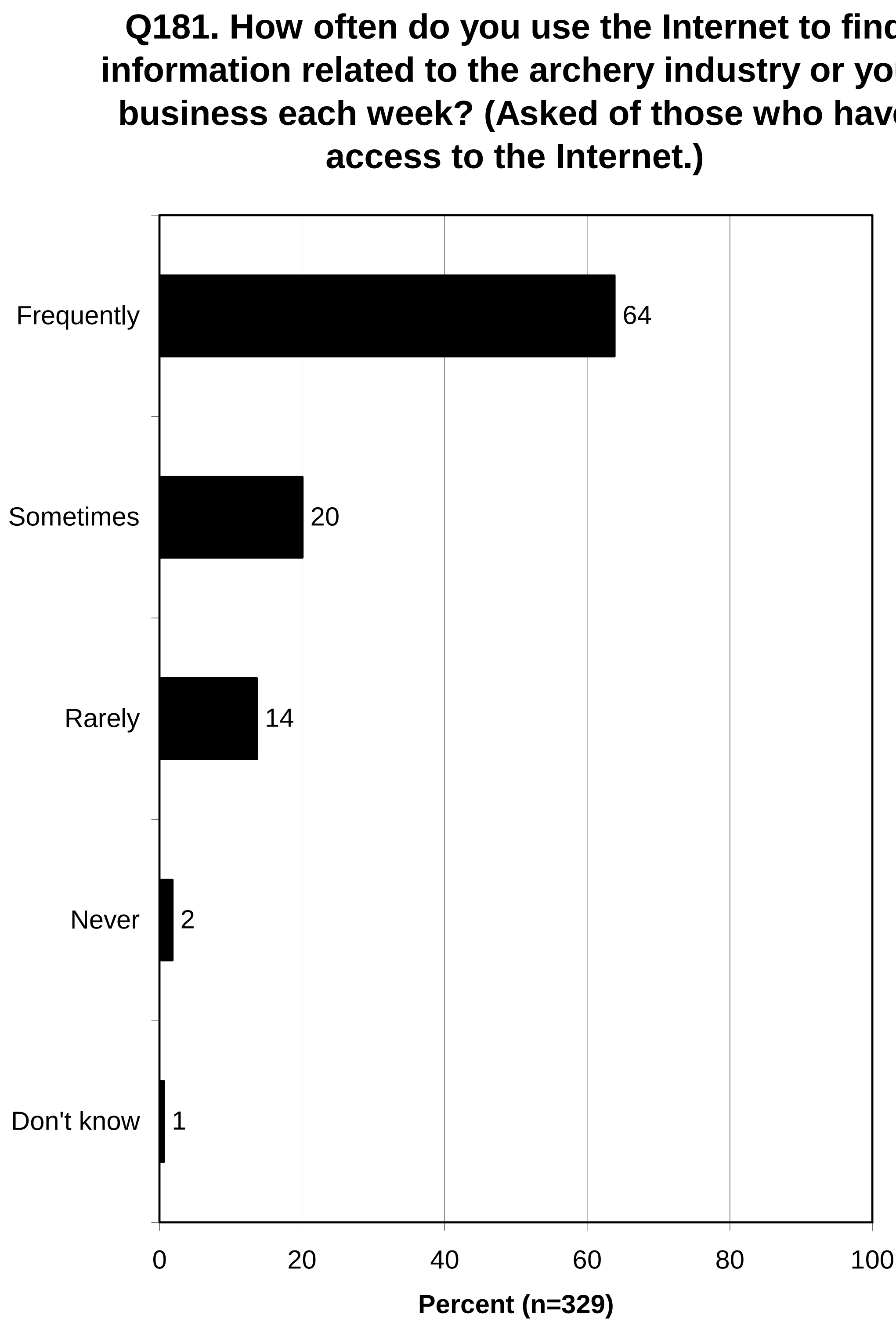
Retailers Survey



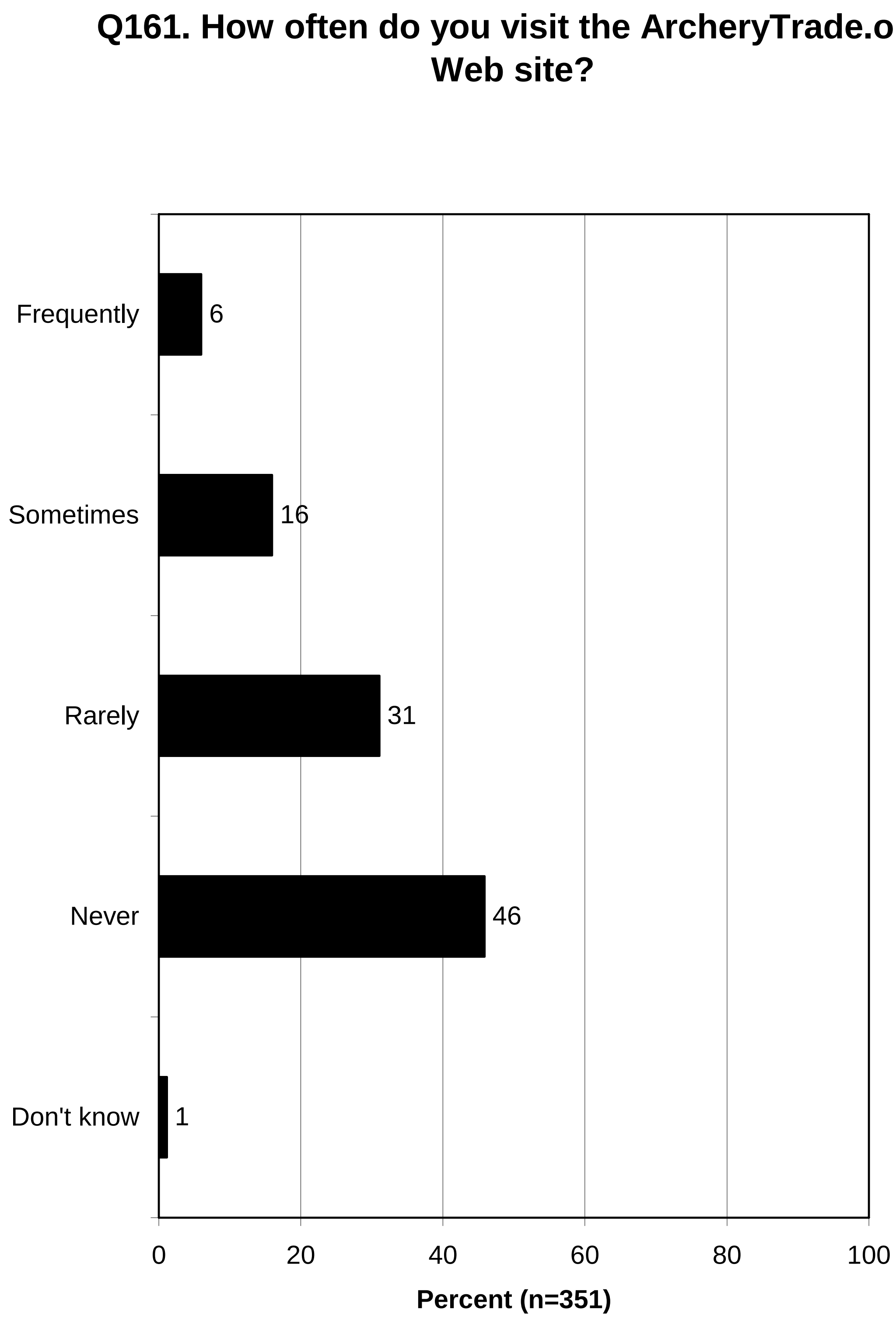
Retailers Survey



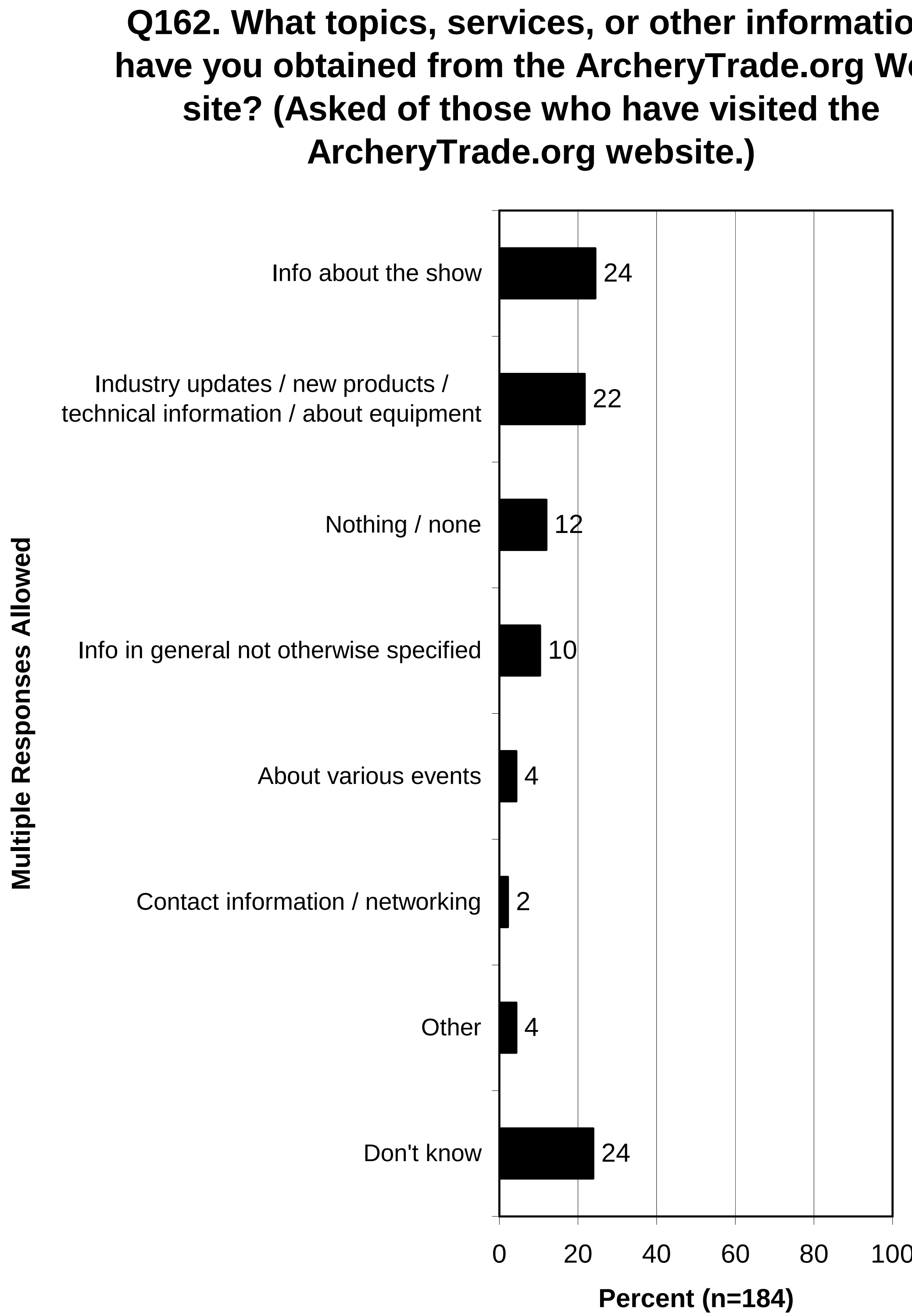
Retailers Survey



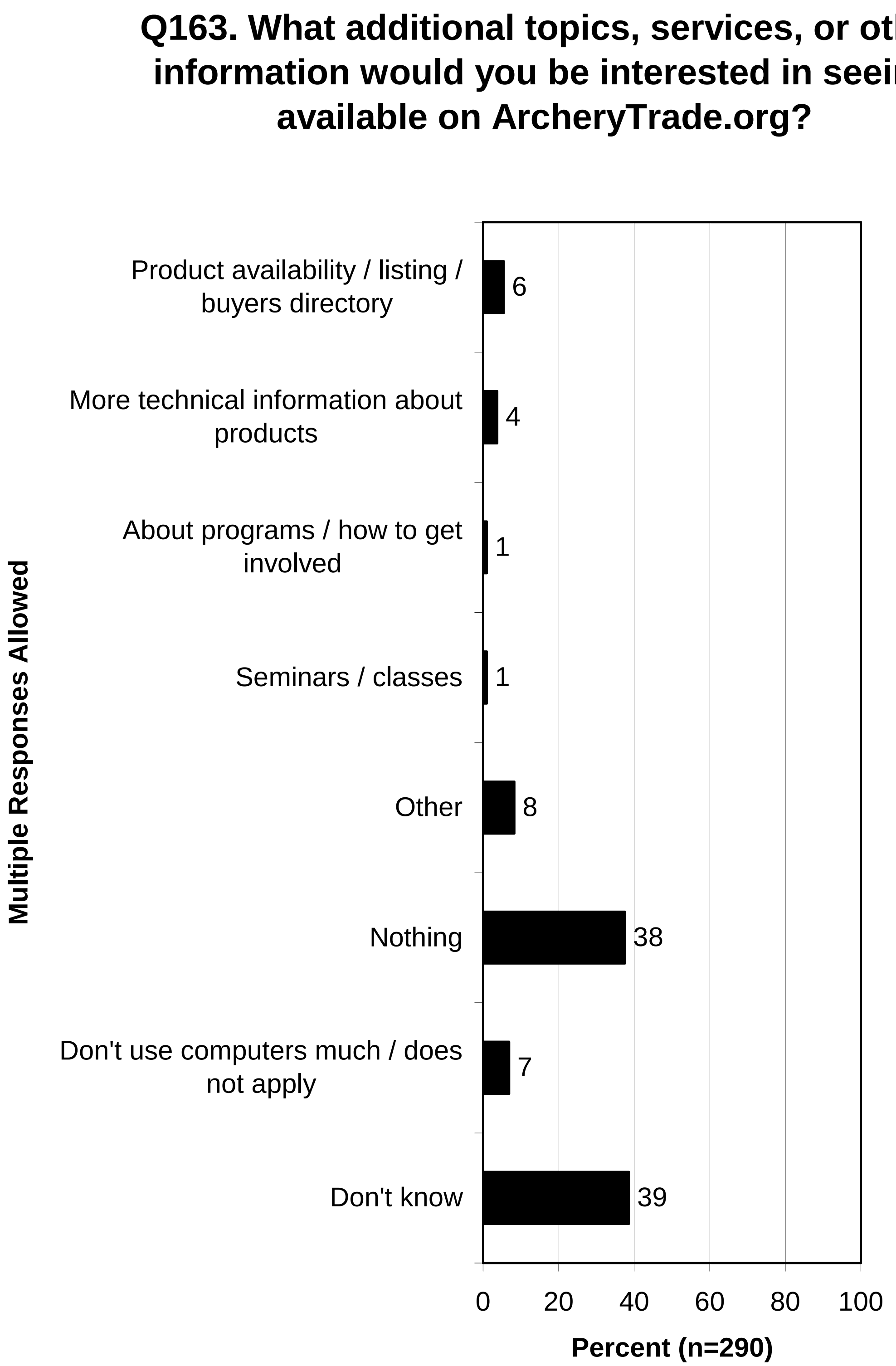
Retailers Survey



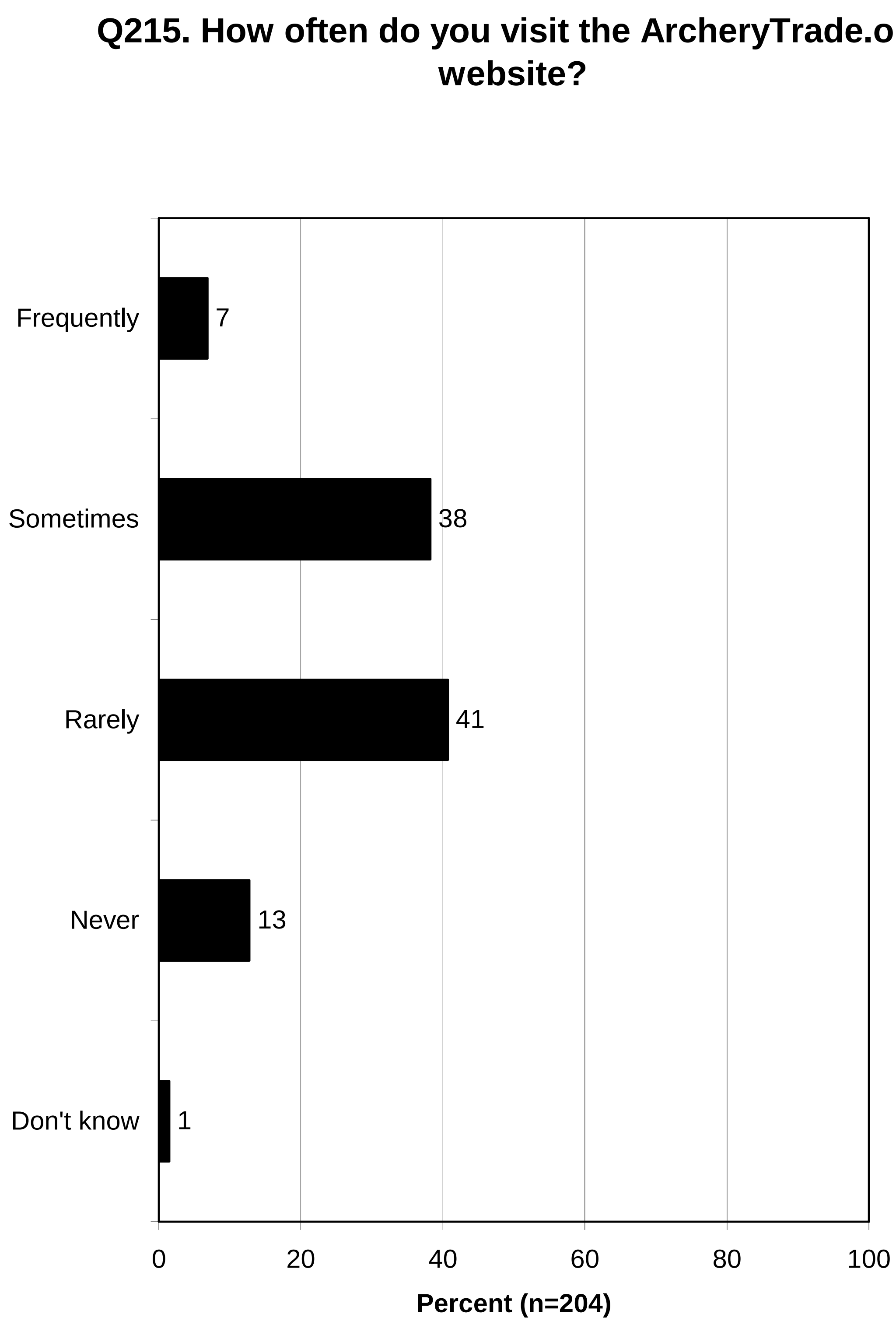
Retailers Survey



Retailers Survey

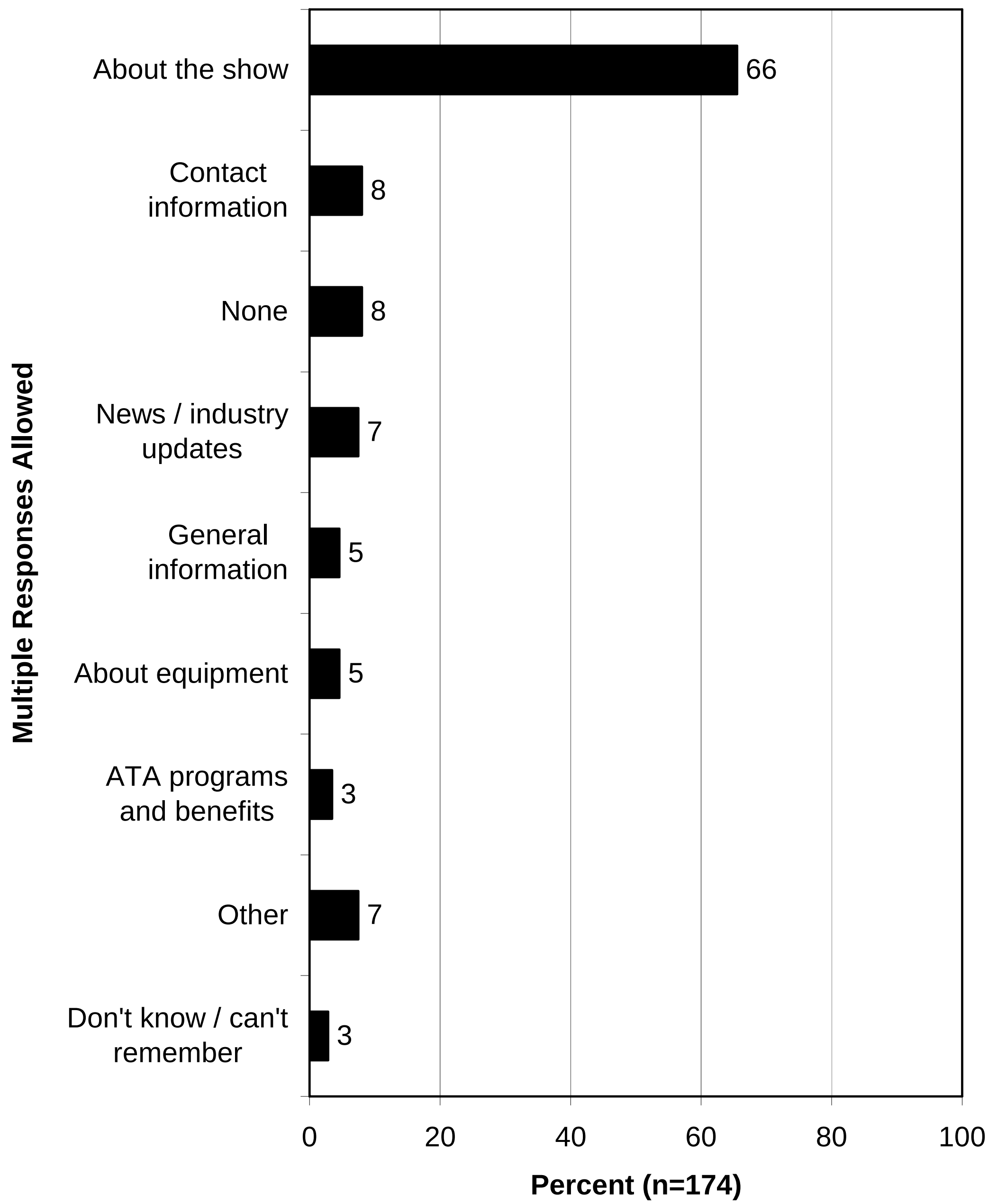


Exhibitors Survey



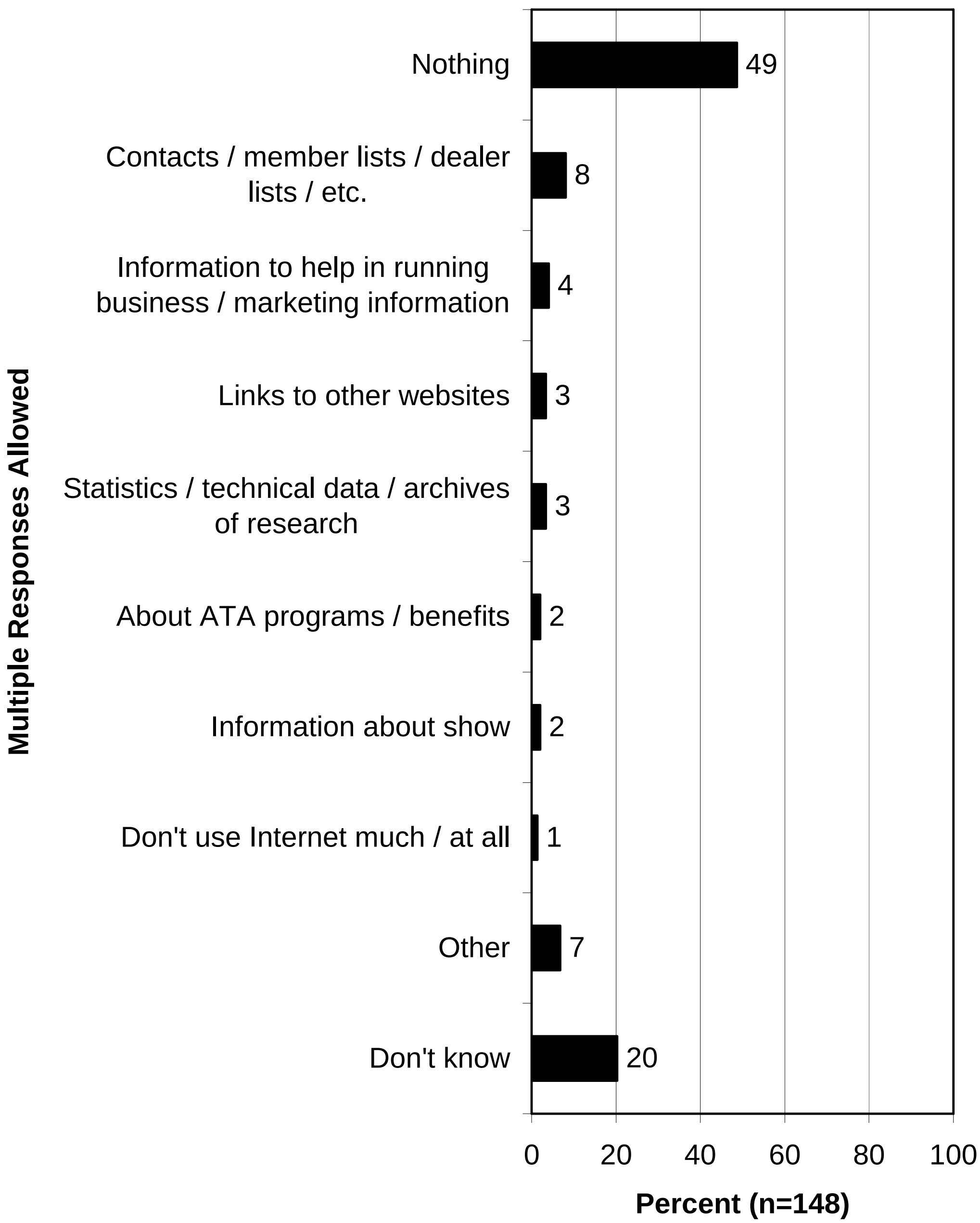
Exhibitors Survey

Q216. What topics, services, or other information have you obtained from the ArcheryTrade.org website? (Asked of those who have visited the ArcheryTrade.org website.)

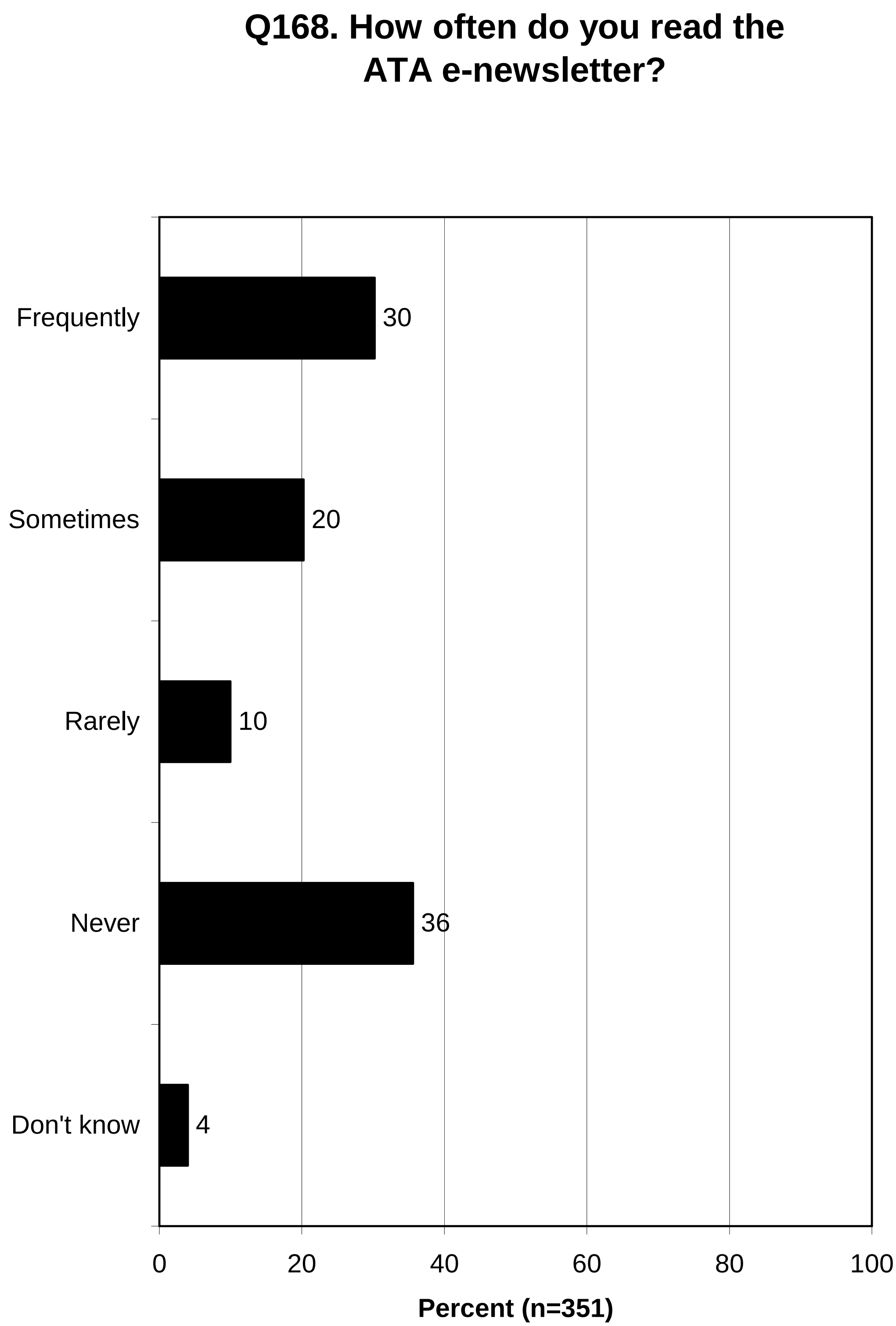


Exhibitors Survey

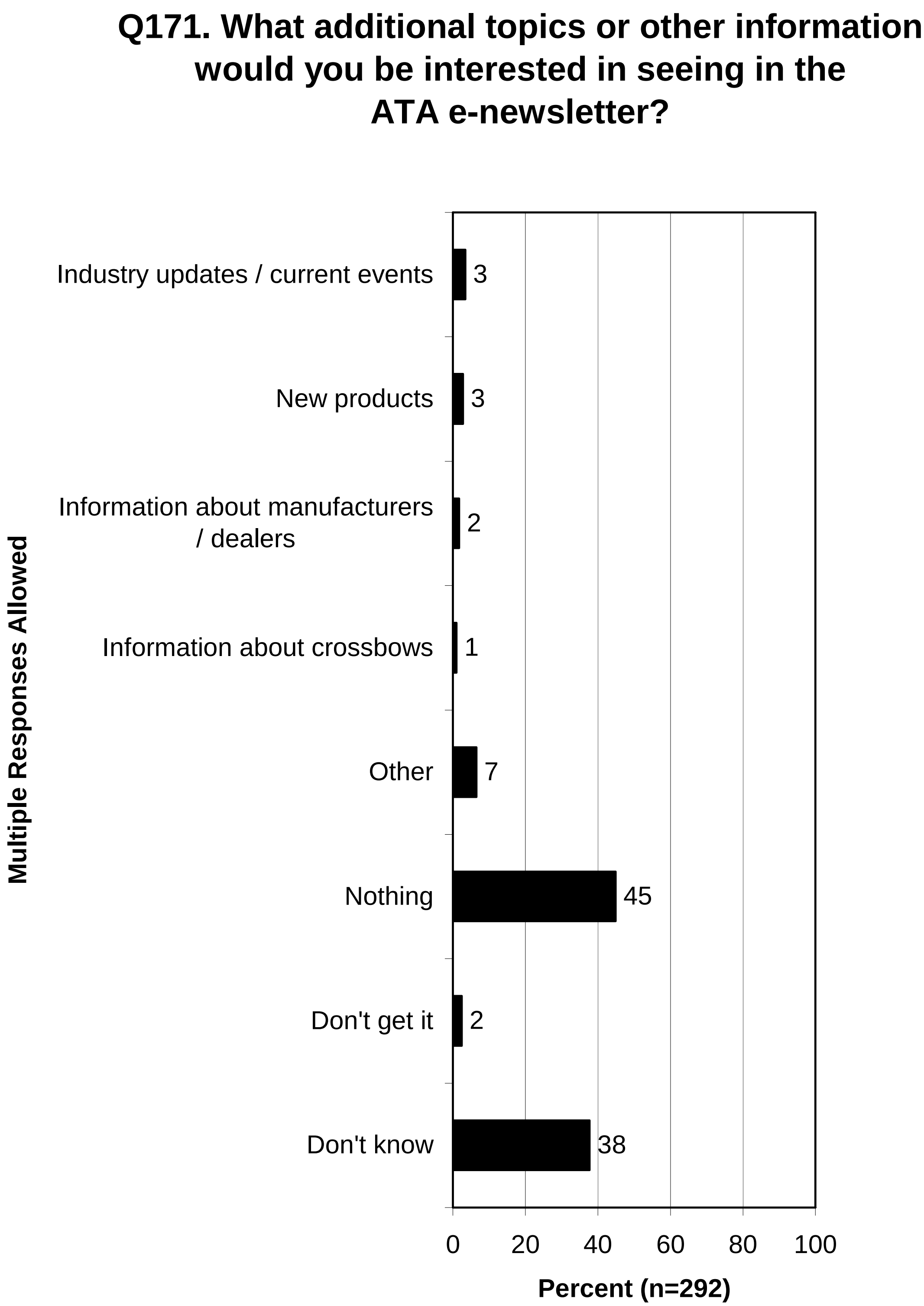
Q217. What additional topics, services, or other information would you be interested in seeing available on ArcheryTrade.org? (Asked of those who have visited the ArcheryTrade.org website.)



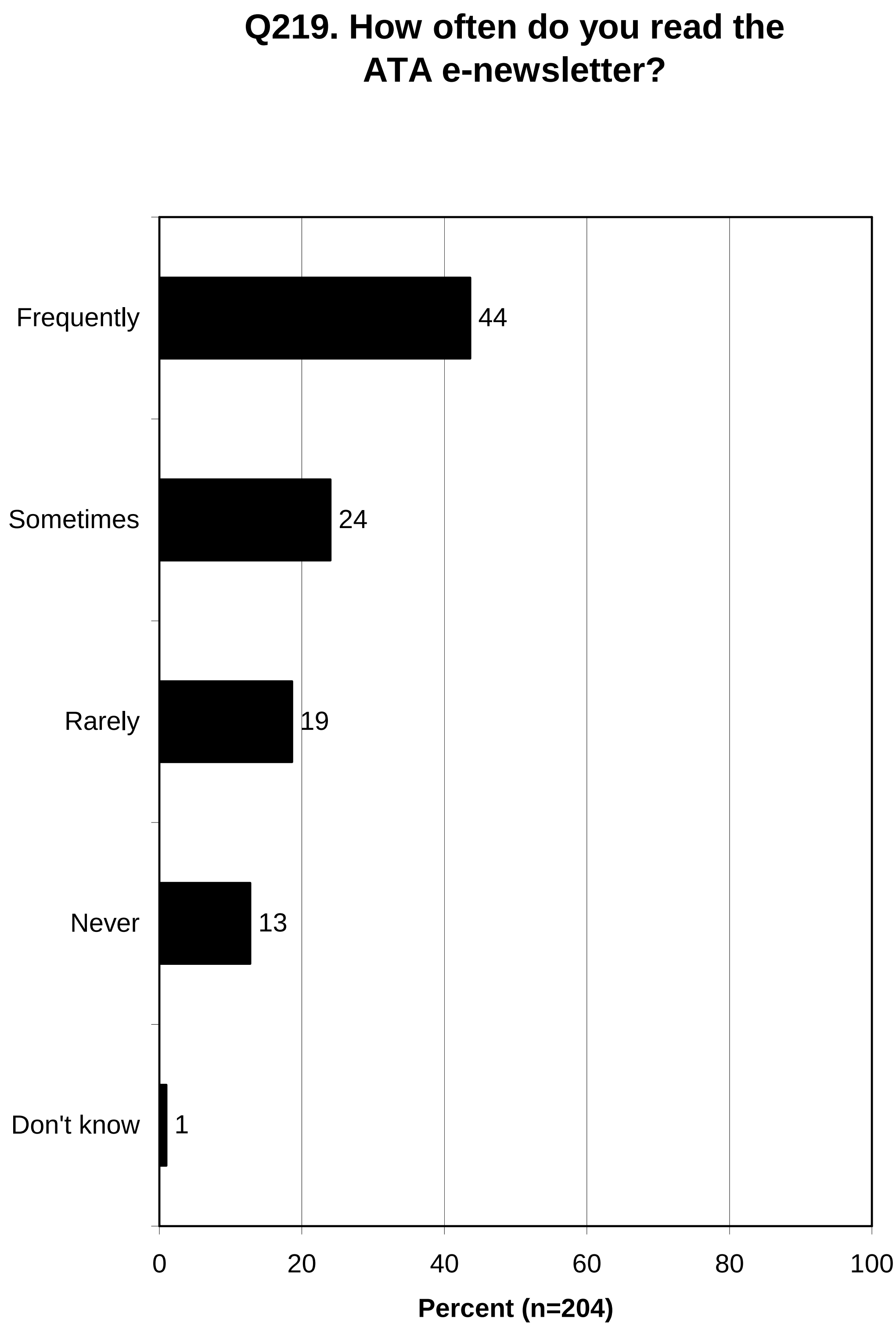
Retailers Survey



Retailers Survey

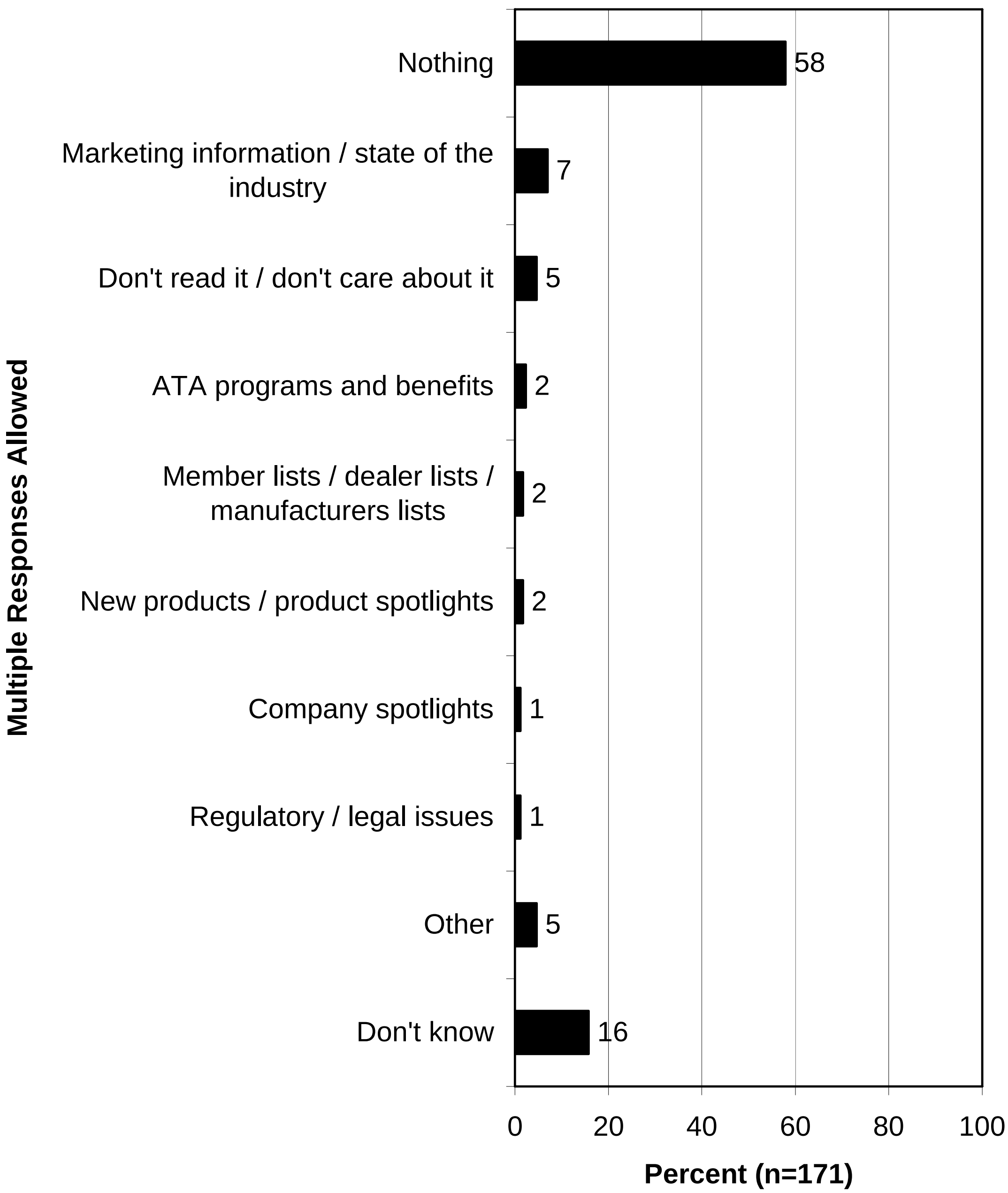


Exhibitors Survey



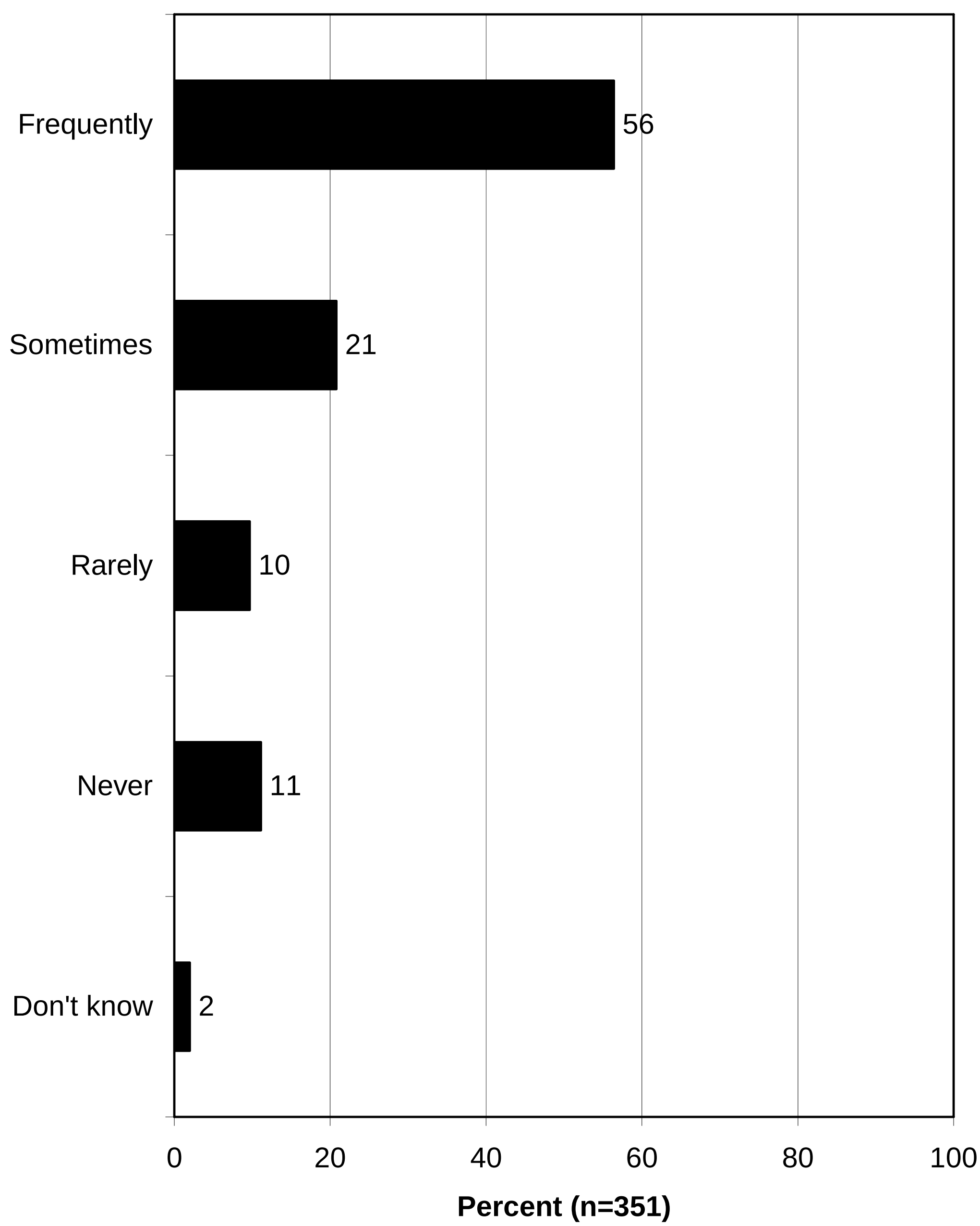
Exhibitors Survey

Q222. What additional topics or other information would you be interested in seeing in the ATA e-newsletter?

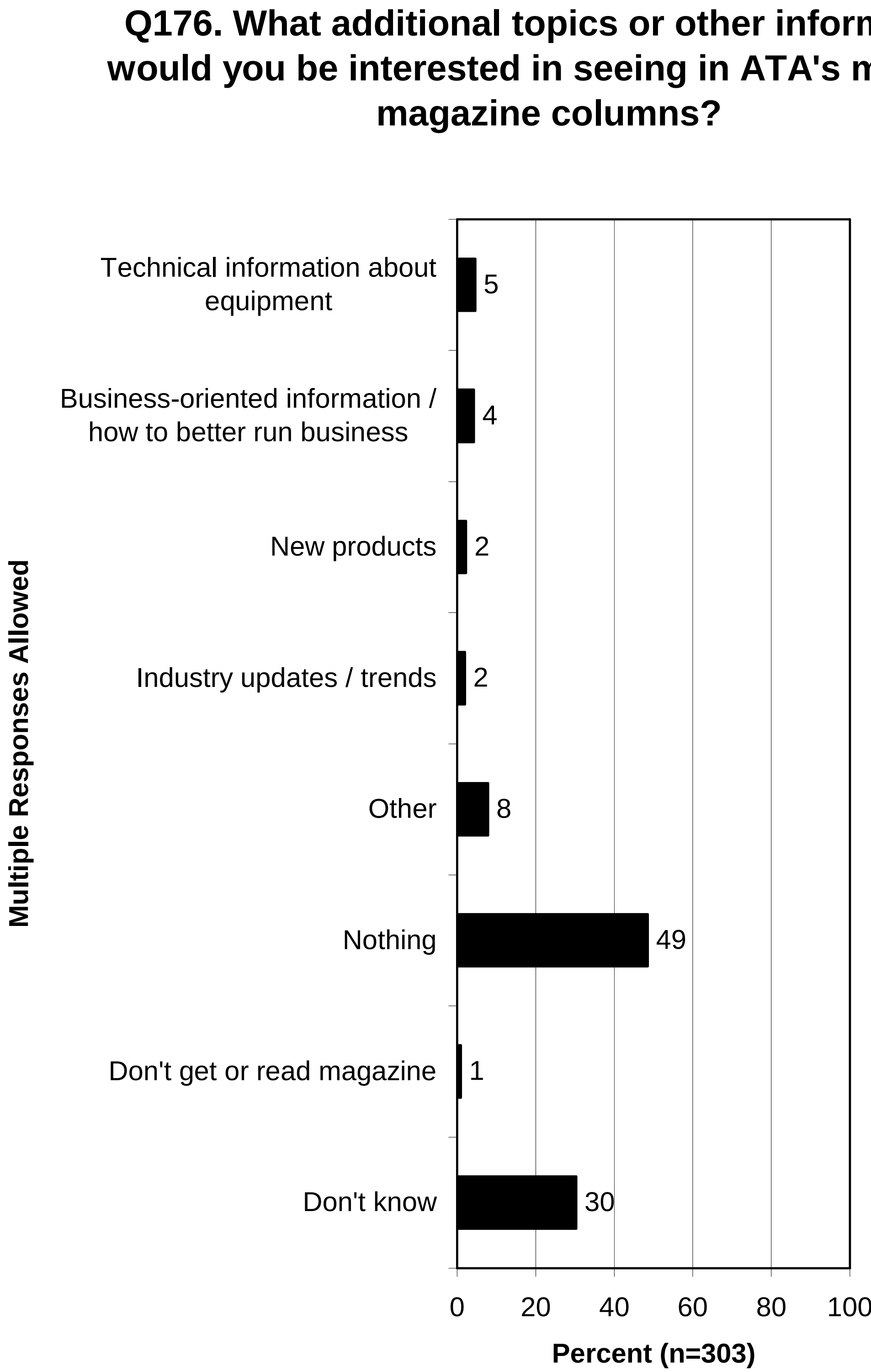


Retailers Survey

Q172. How often do you read the ATA's monthly columns in such magazines as Inside Archery, ArrowTrade, and Archery Business?

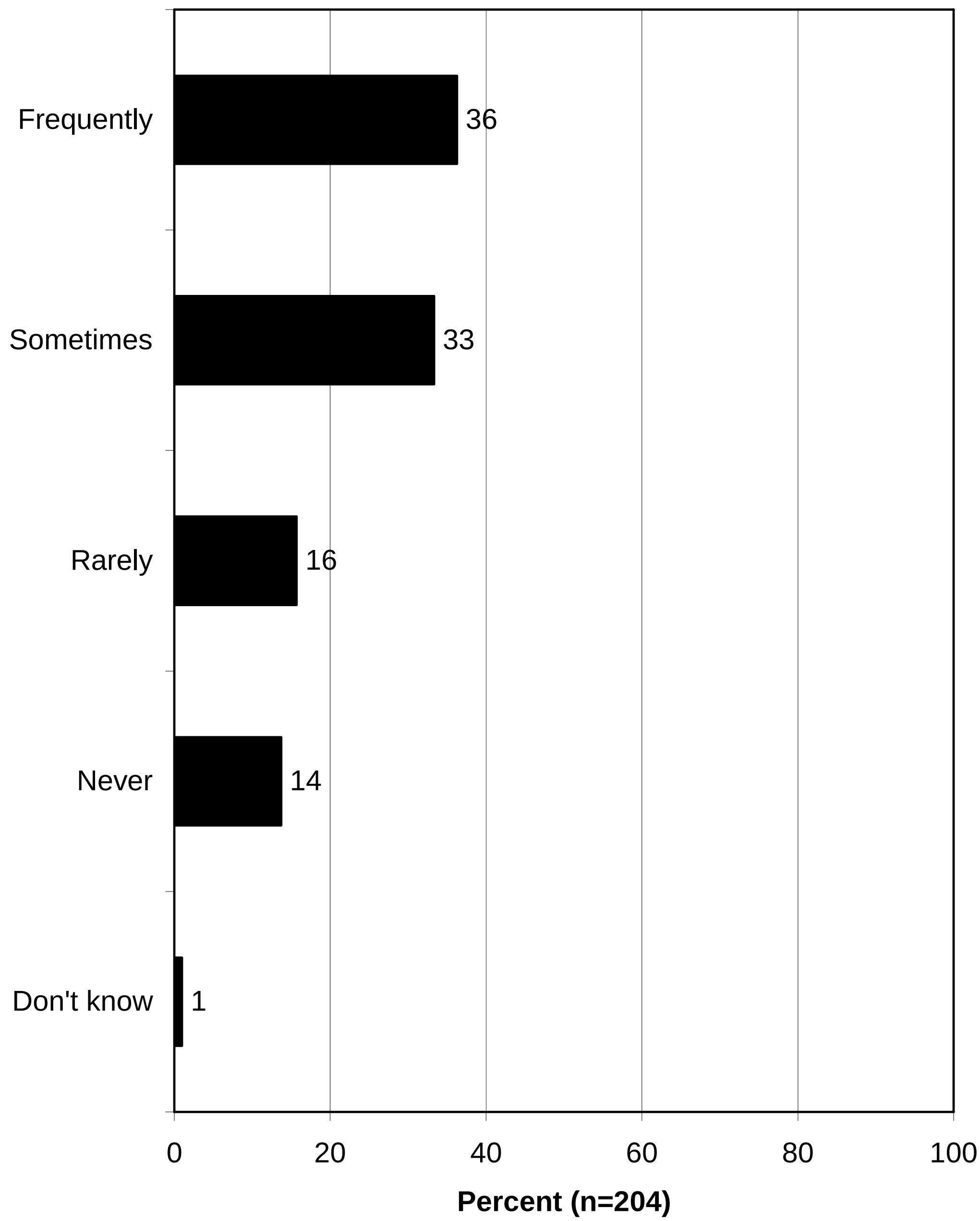


Retailers Survey

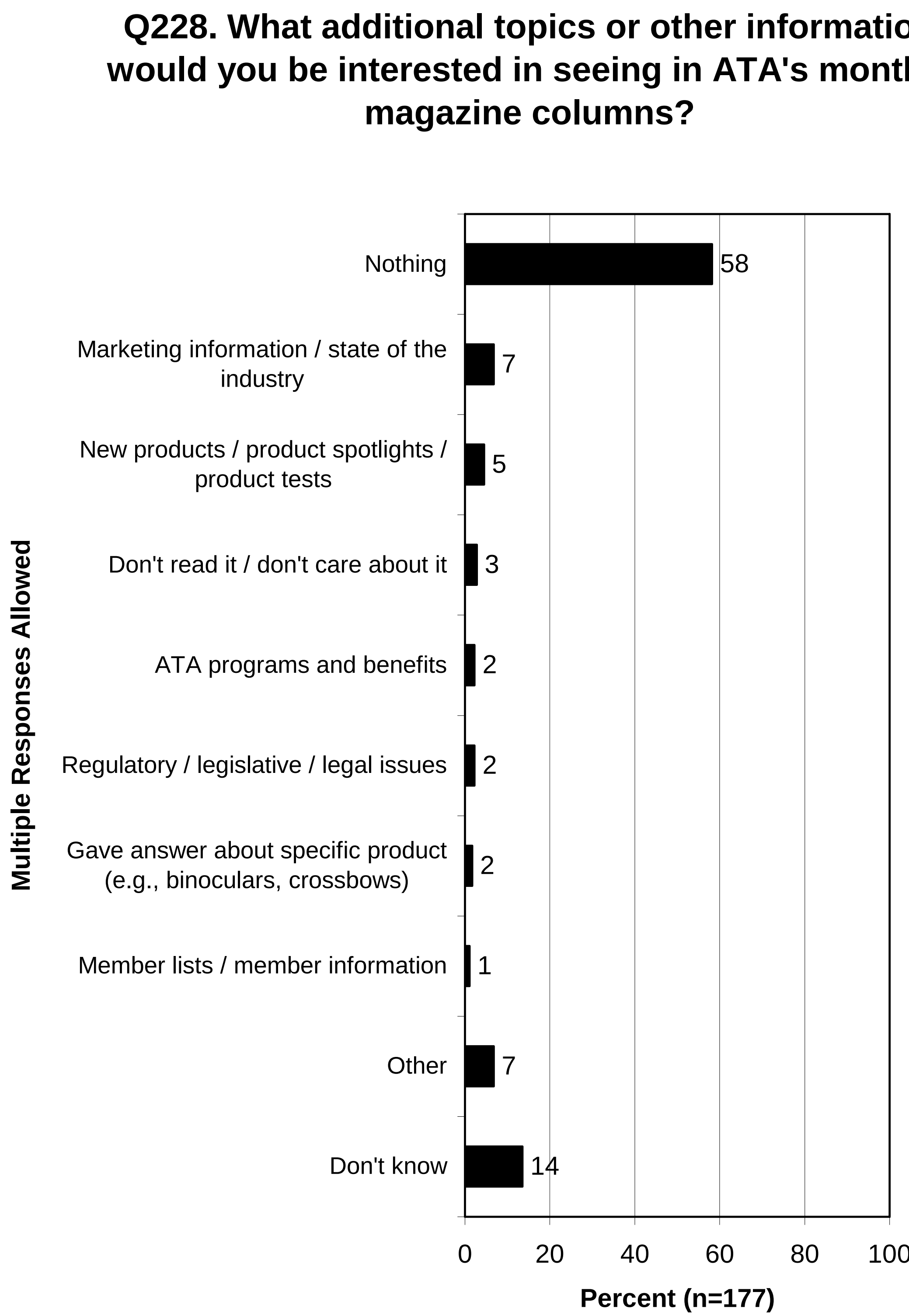


Exhibitors Survey

Q225. How often do you read the ATA's monthly columns in such magazines as Inside Archery, ArrowTrade, and Archery Business?



Exhibitors Survey



RETAILERS' AND EXHIBITORS' ADVERTISING AND PROMOTIONS

- Retailers surveyed are split in how much they say they advertise to promote business: 58% say a great deal or moderate amount, while 41% say a little or not at all. Middle answers (moderate, a little) far exceed the extremes (great deal, not at all).

- The survey asked retailers to name the types of advertising that have been the most effective for their company: newspapers (21%), radio (18%), word of mouth (16%), the Internet (10%), and TV (8%) were most commonly named.

- Both surveys asked about social networking tools, such as YouTube or Facebook.
  - Among retailers, 7% indicate using social networking tools, such as YouTube or Facebook, to promote their store and products. A question with a slightly different nuance asked retailers if they had ever used social networking or marketing tools to look for information related to the archery industry or their store: 37% indicated that they had.
    - Those retailers who use social networking tools or marketing tools for promotion overwhelmingly agree (84%) that those tools are beneficial to their store.
  - In a companion question in the exhibitor survey, a substantial percentage of exhibitors (39%) have used social networking or marketing tools to promote their business or provide information. Also, a substantial percentage of exhibitors (42%) have used social networking or marketing tools to look for information related to the archery industry or their business.
    - Those exhibitors who use social networking tools or marketing tools for promotion overwhelmingly agree (92%) that those tools are beneficial to their company.

- When retailers were asked if their store/company is listed on ArcherySearch.com, they most commonly did not know (47%). Meanwhile, 16% indicated that they were listed.
  - Results are mixed among those who are listed regarding whether the listing has benefited their company: while 49% agree that their company has benefited, 16% disagree, and 35% do not know or gave a neutral answer.

- The exhibitor survey asked respondents seven questions about how much of the company's resources are put into various types of advertising, using a scale of 0 to 10, with 0 being no resources and 10 being a great deal of resources. The results were ranked.
  - In looking at means, magazine ads (mean of 4.54), online/Internet ads (4.26), TV ads (3.62), and email marketing (2.78) are markedly above radio, newspaper, and billboards. Also shown is the percentages giving a rating of 9 or 10, as well as the percentages giving a rating of 0.
  - After this series, exhibitors could name any other types of advertising that their company uses. They most commonly named direct mail/flyers, sponsorships/partnerships, banners/displays at events, and telephone marketing/yellow pages.

- (194e et al.). Following the above series, exhibitors who used each type of advertising were asked to rate its effectiveness. These results were ranked.
  - In looking at means, the most effective (among users of those types) are TV (mean of 6.83), online/Internet ads (5.47), magazine ads (5.37), and email marketing (5.10). Also shown is the percentages giving a rating of 9 or 10, as well as the percentages giving a rating of 0.

- Exhibitors were asked how valuable would advertising in the ATA e-newsletter be to their company if it were available. Just over half say it would be valuable (51%), but most of those responses are in the *somewhat* valuable (40%) rather than the *very* valuable (11%) part of the scale. Meanwhile, 40% say it would be not at all valuable.
  - Answers are nearly exactly the same regarding likelihood that their company would advertise in the ATA e-newsletter: very likely (10%), somewhat likely (41%), not at all likely (43%).

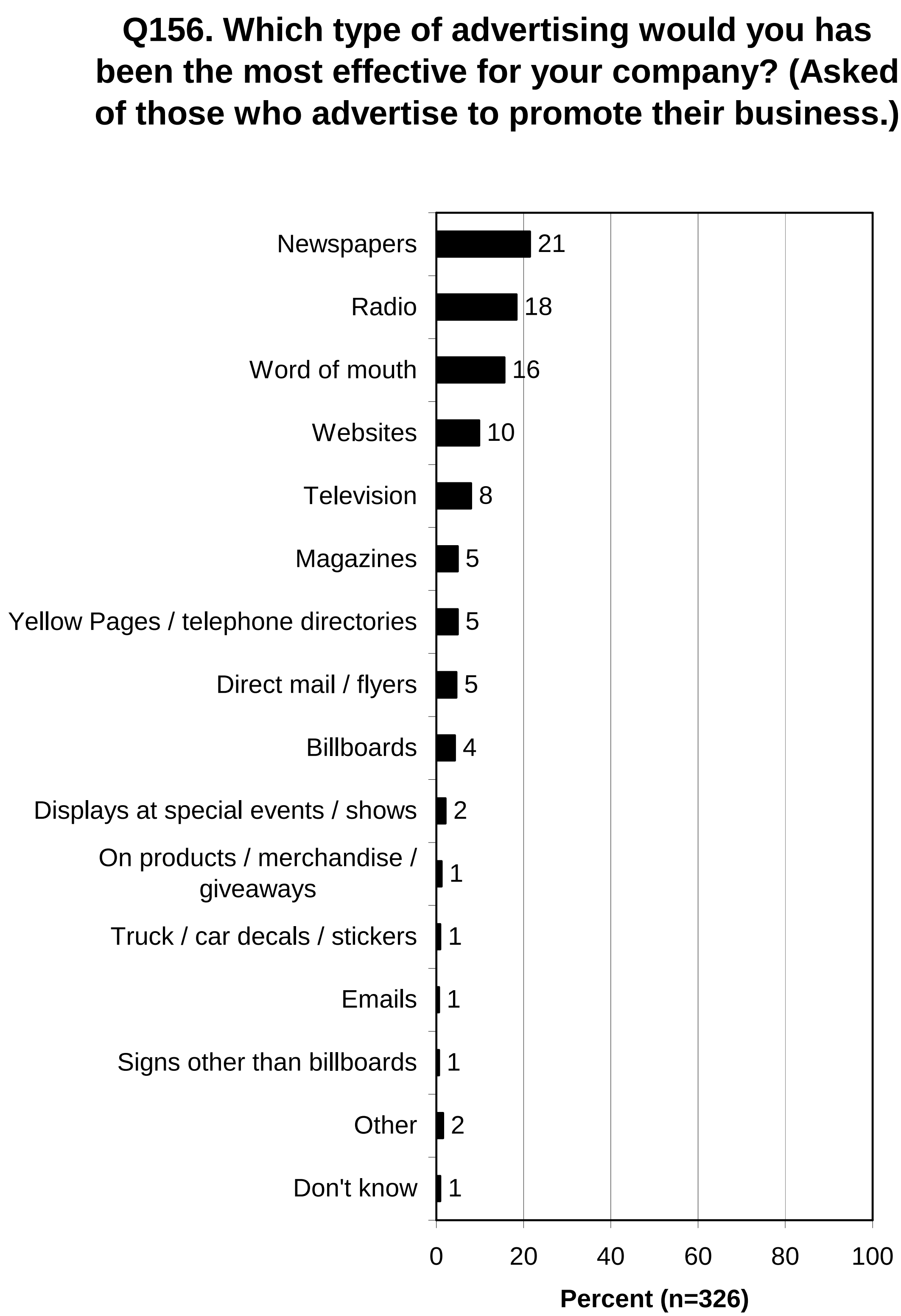
- Exhibitors were asked about the percentages of their marketing efforts that are directed at archers and at bowhunters.
  - Exhibitors were asked to indicate the percentage of their company's marketing that targets archers: The mean is 45.5 percent. Note that 21% said that *no* marketing is

targeted at archers, and another 22% gave an answer of less than a quarter of their marketing (a sum of 43% giving an answer of less than a quarter).

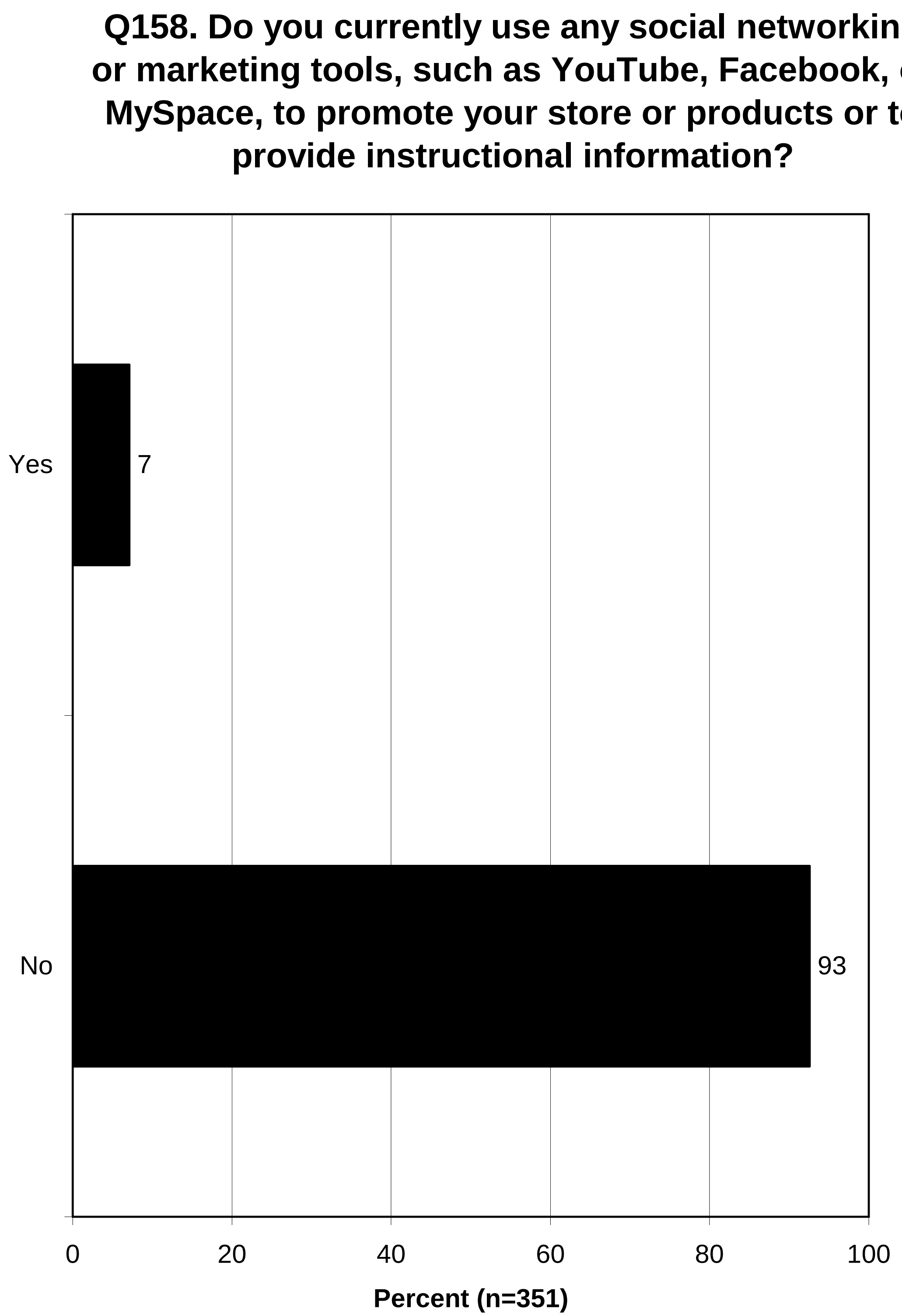
- Regarding the percentage of their company's marketing that targets bowhunters, the mean is 70.3 percent. Only 6% said that *no* marketing was directed at bowhunters, and another 9% gave an answer of less than a quarter of their marketing (a sum of 15% giving an answer of less than a quarter).

Retailers Survey

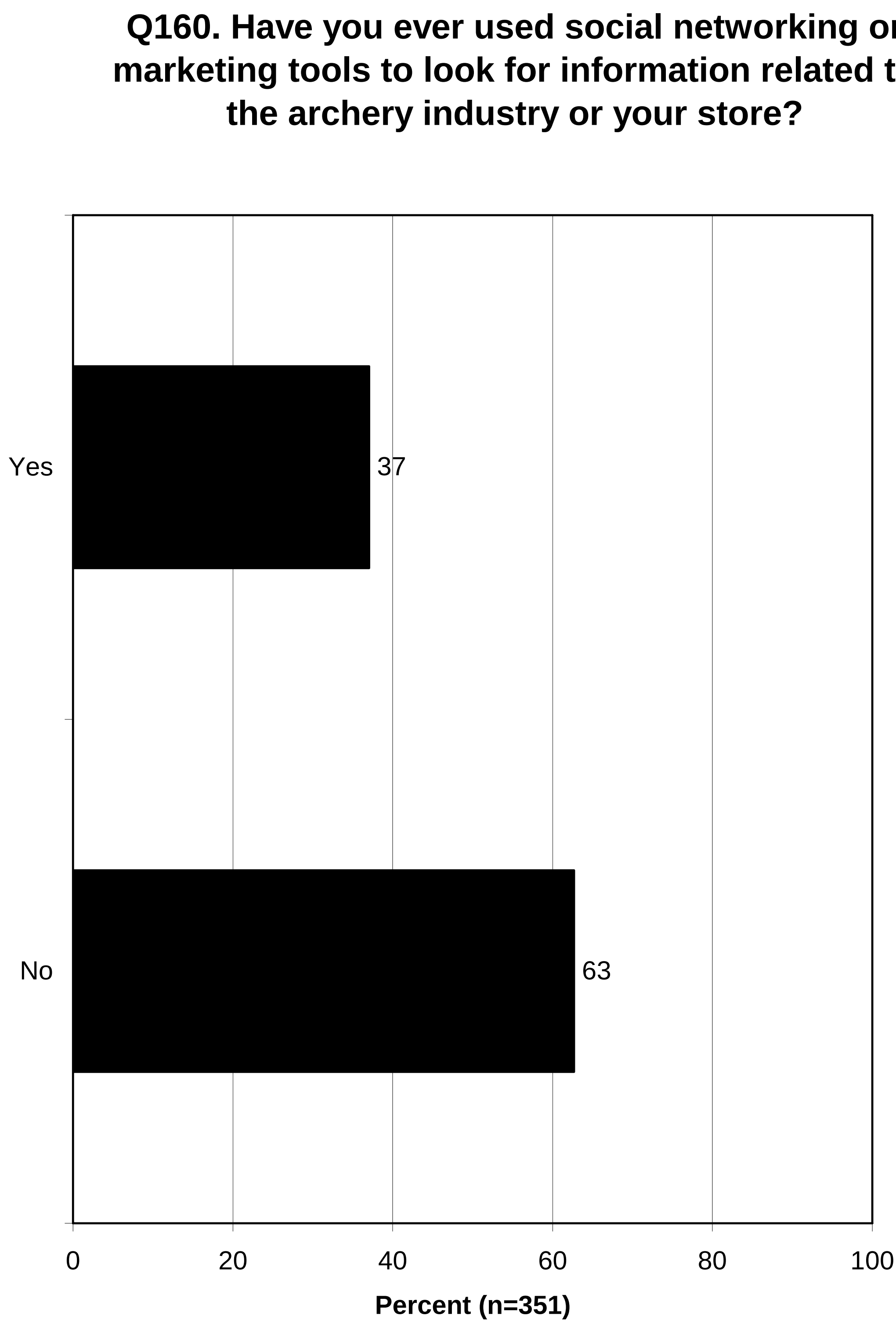
Retailers Survey



Retailers Survey

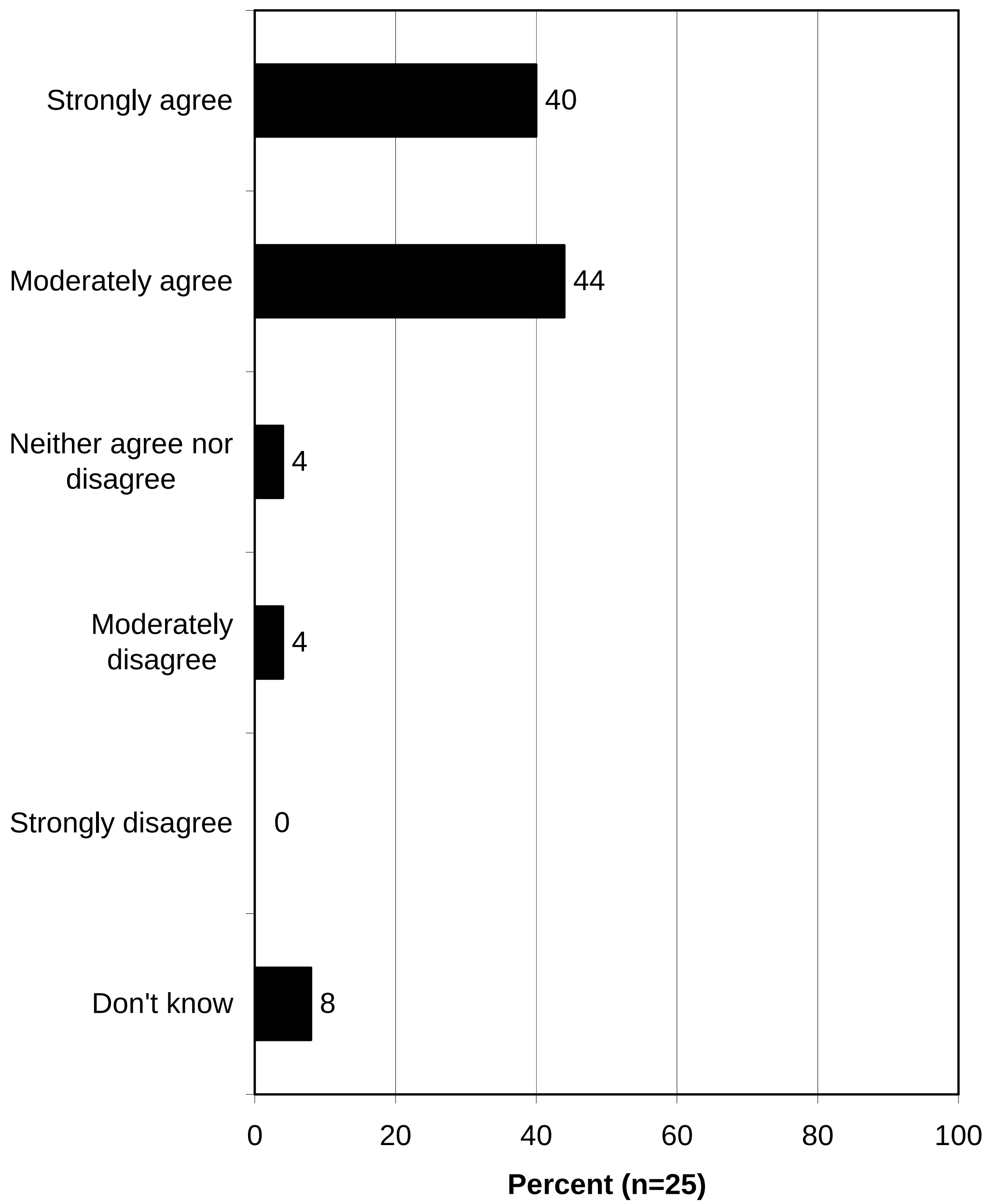


Retailers Survey

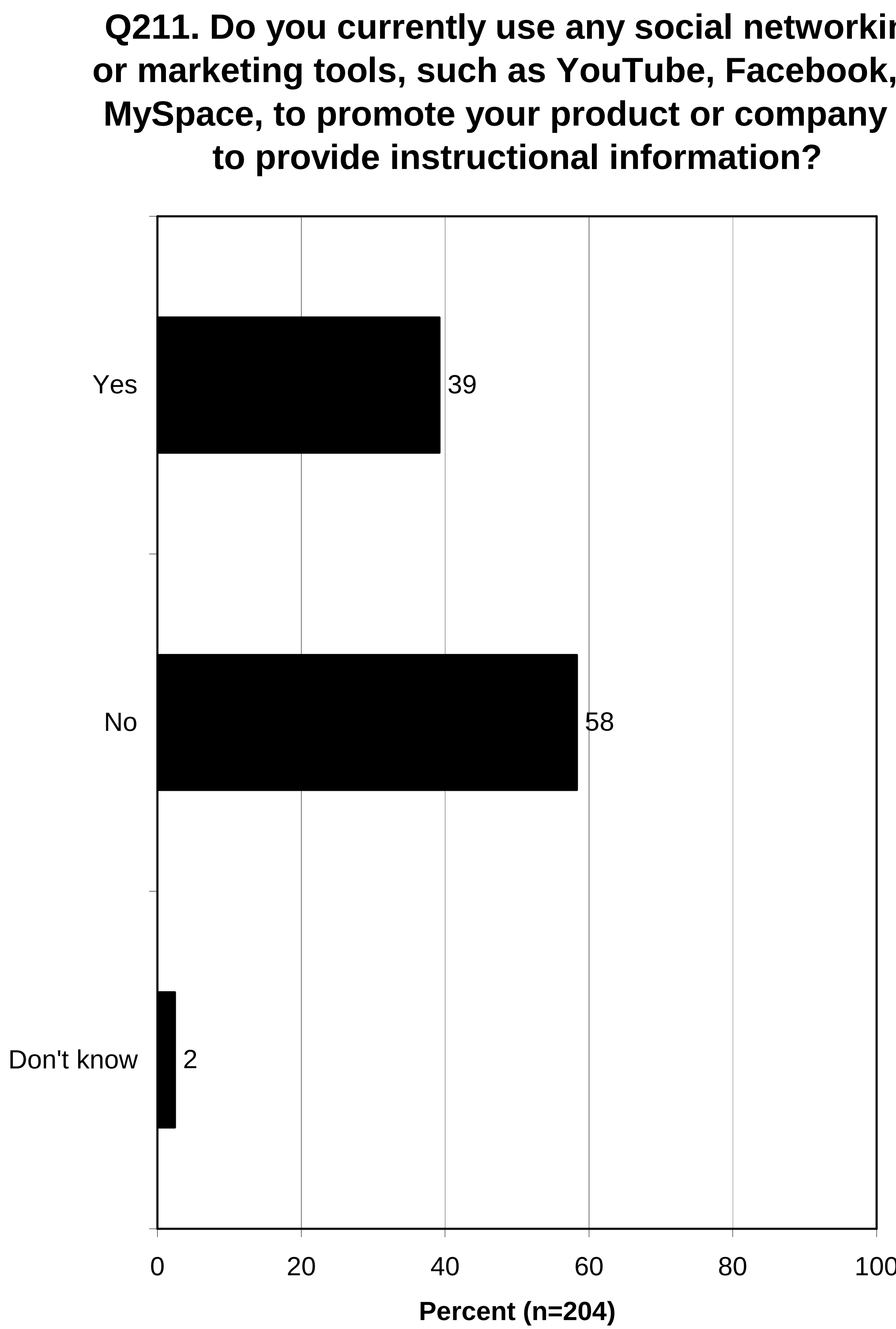


Retailers Survey

Q159. Do you agree or disagree that the social networking or marketing tools you use are beneficial to your store? (Asked of those who currently use a social networking or marketing tool to promote their store or products or to provide instructional information.)

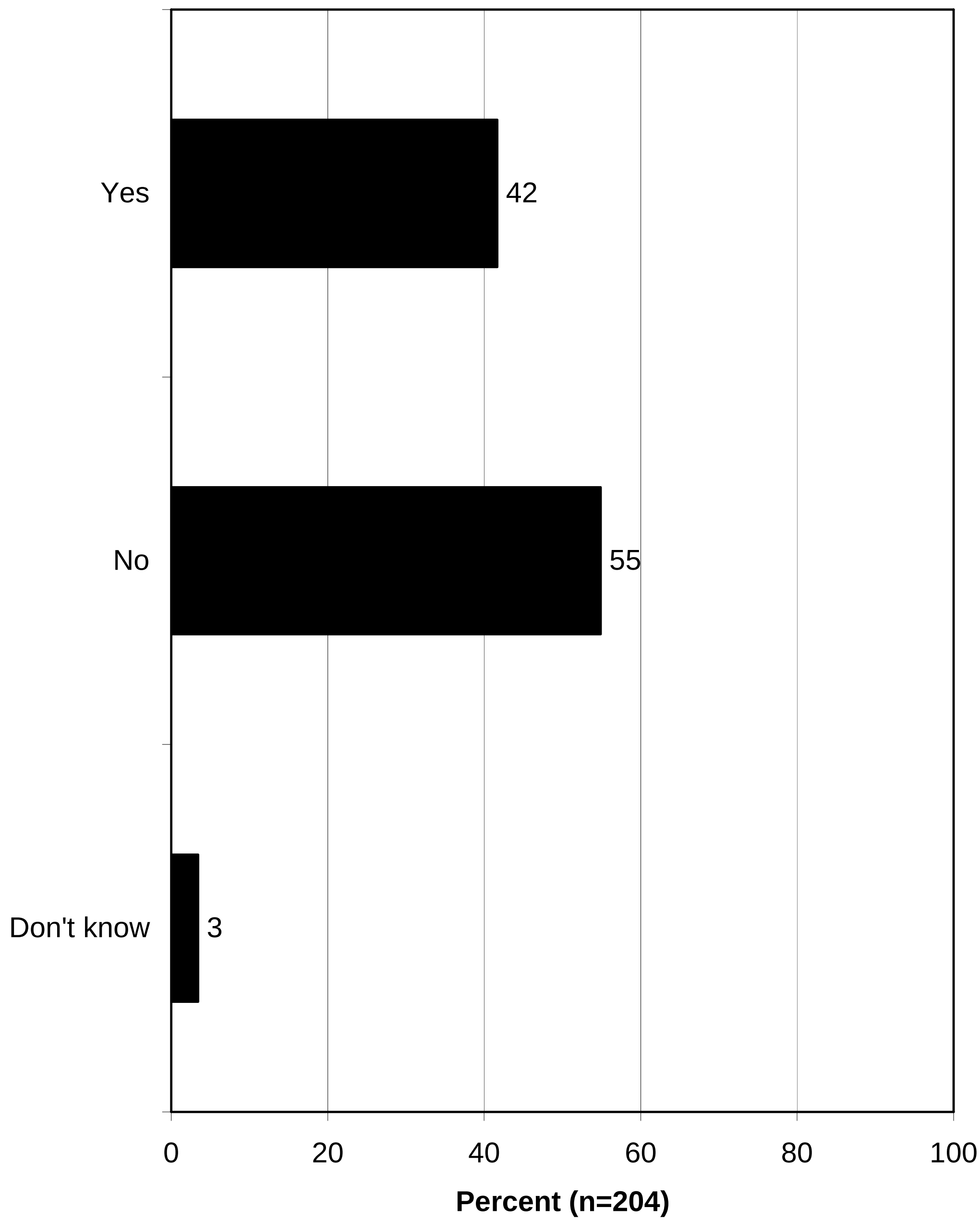


Exhibitors Survey



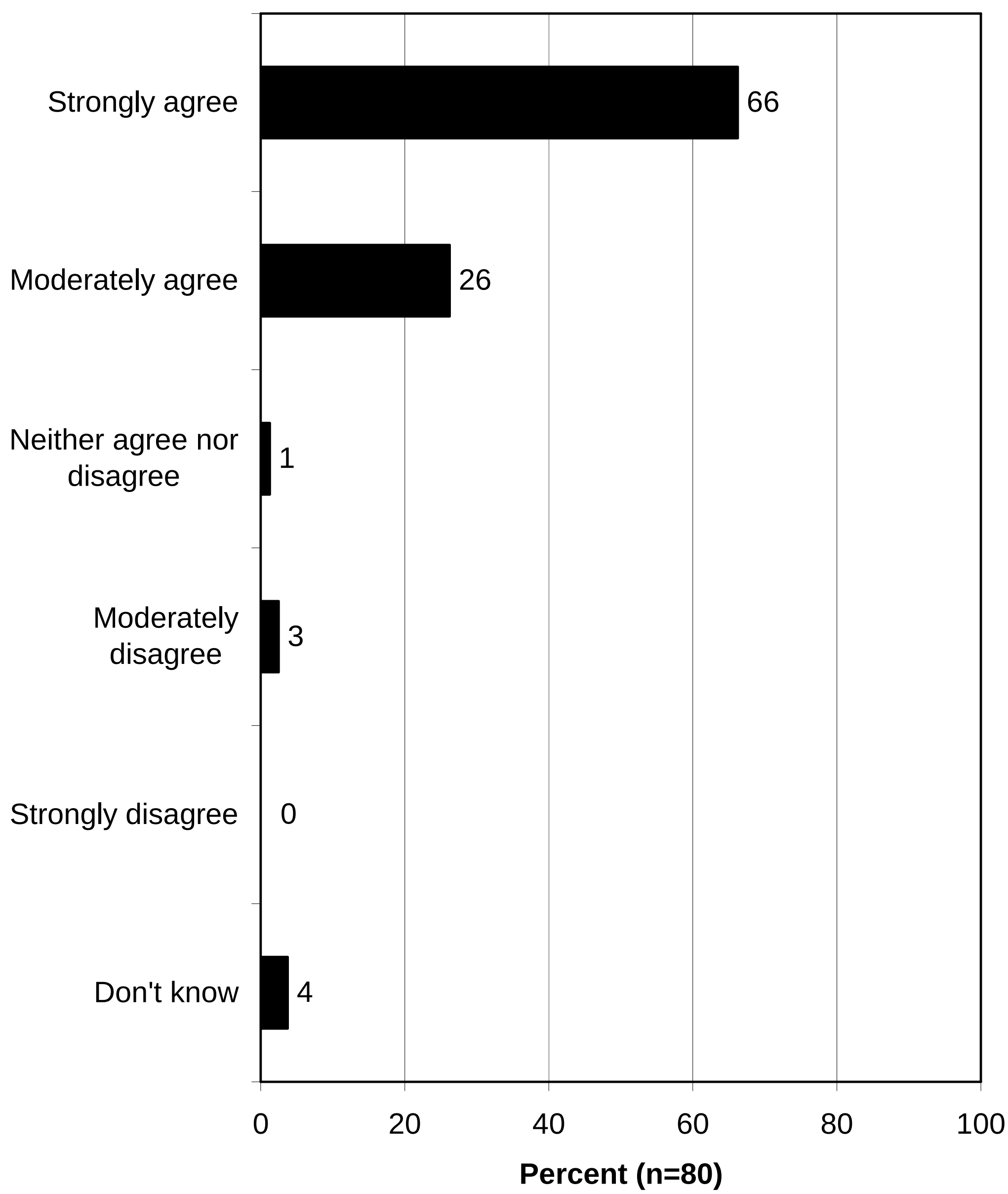
Exhibitors Survey

Q213. Have you ever used social networking or marketing tools to look for information related to the archery industry or your business?

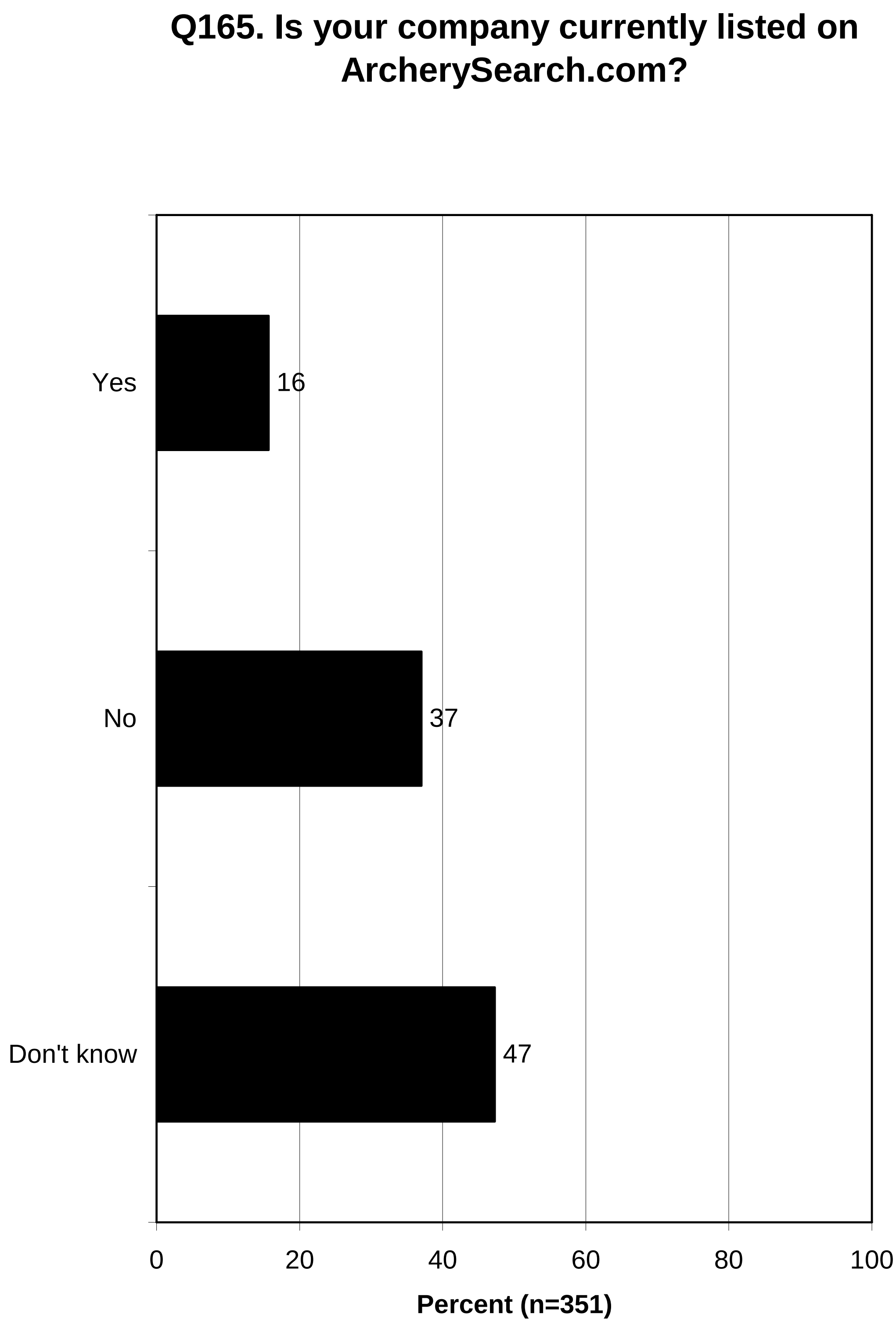


Exhibitors Survey

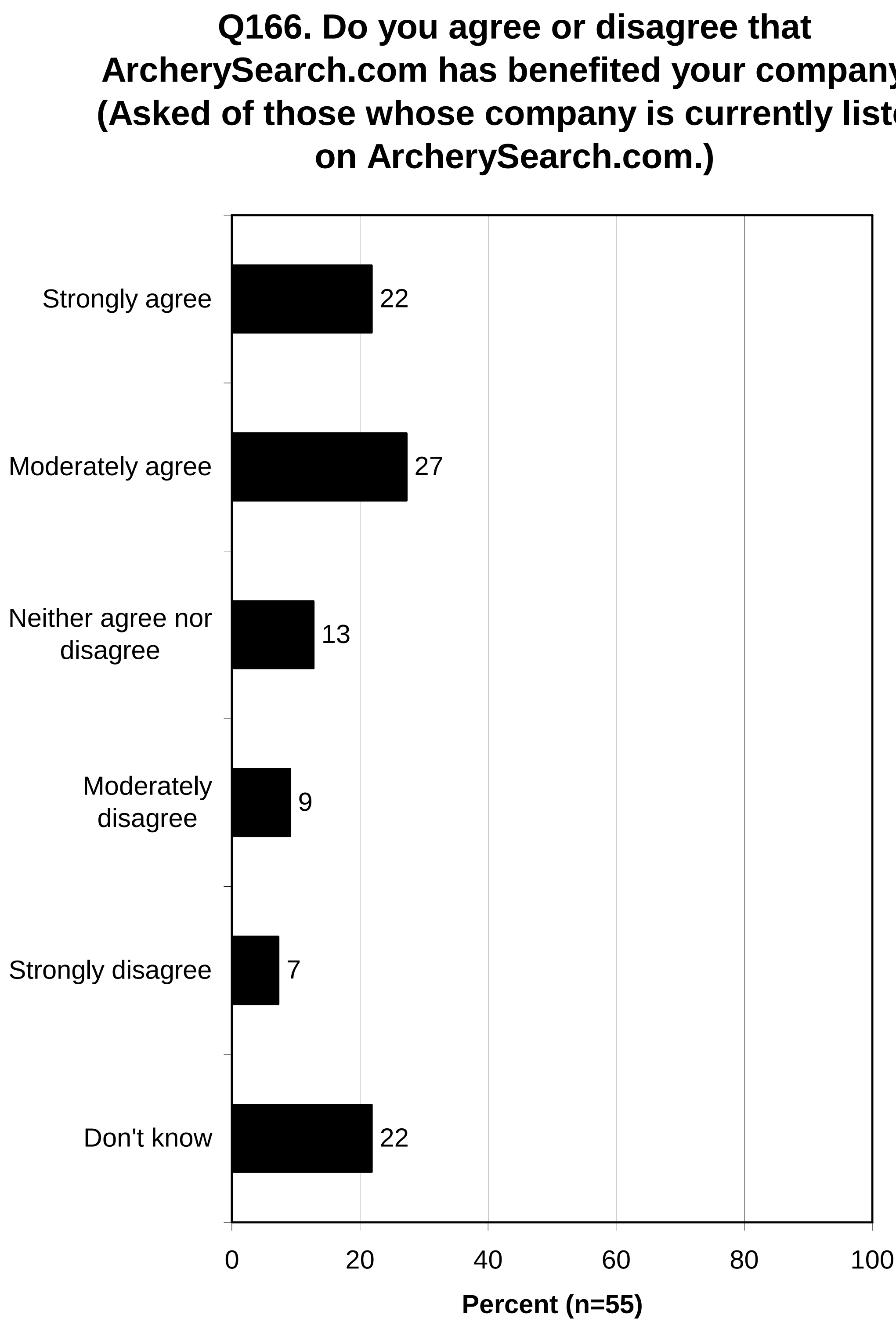
Q212. Do you agree or disagree that the social networking or marketing tools that you use are beneficial to your company? (Asked of those who currently use a social networking or marketing tool to promote their product or company or to provide instructional information.)



Retailers Survey

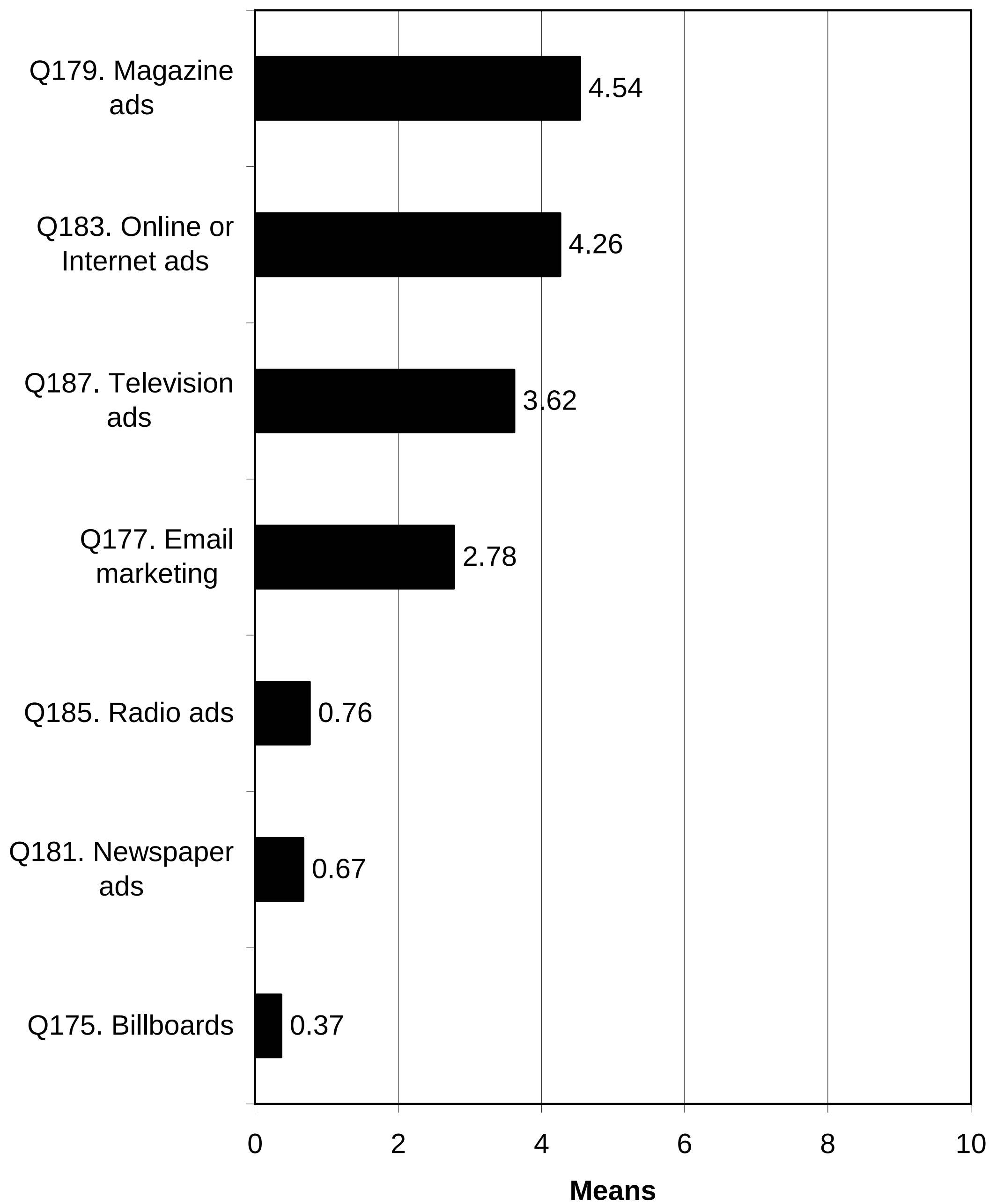


Retailers Survey



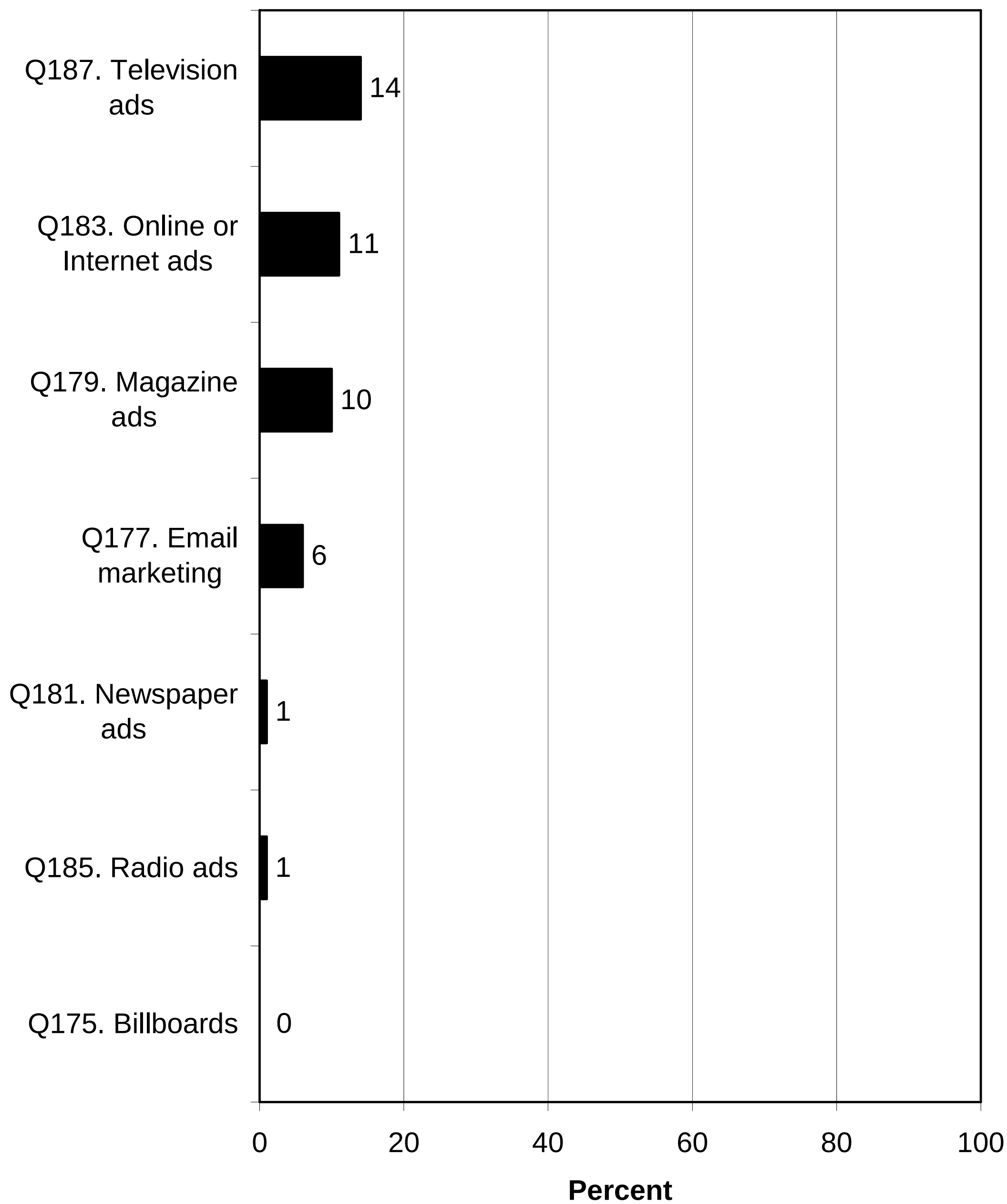
Exhibitors Survey

On a scale of 0 to 10 where 0 is no resources at all and 10 is a great deal of resources, the mean rating of the amount of company's resources that are put into the following types of advertising.

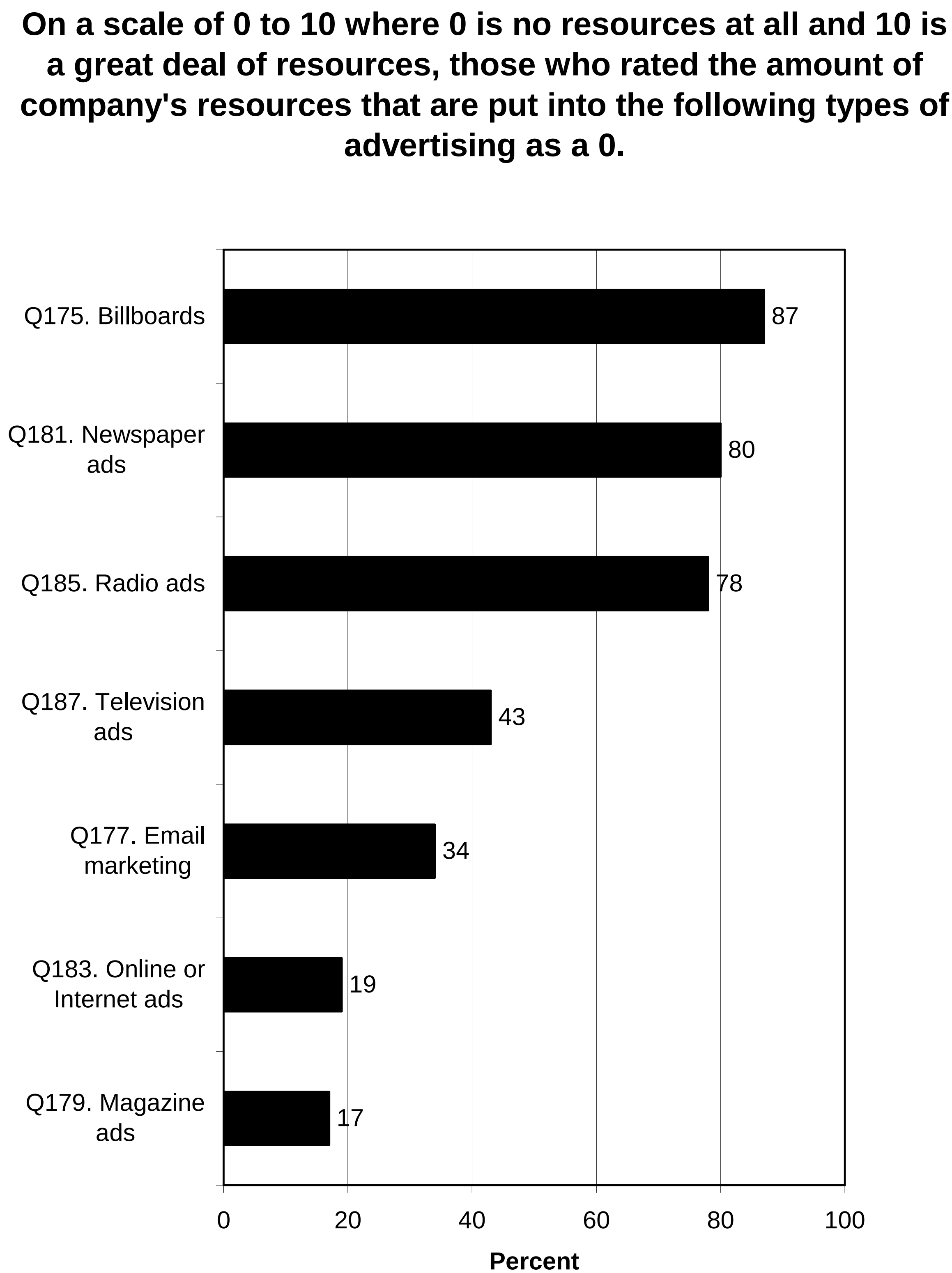


Exhibitors Survey

On a scale of 0 to 10 where 0 is no resources at all and 10 is a great deal of resources, those who rated the amount of company's resources that are put into the following types of advertising as a 9 or 10.



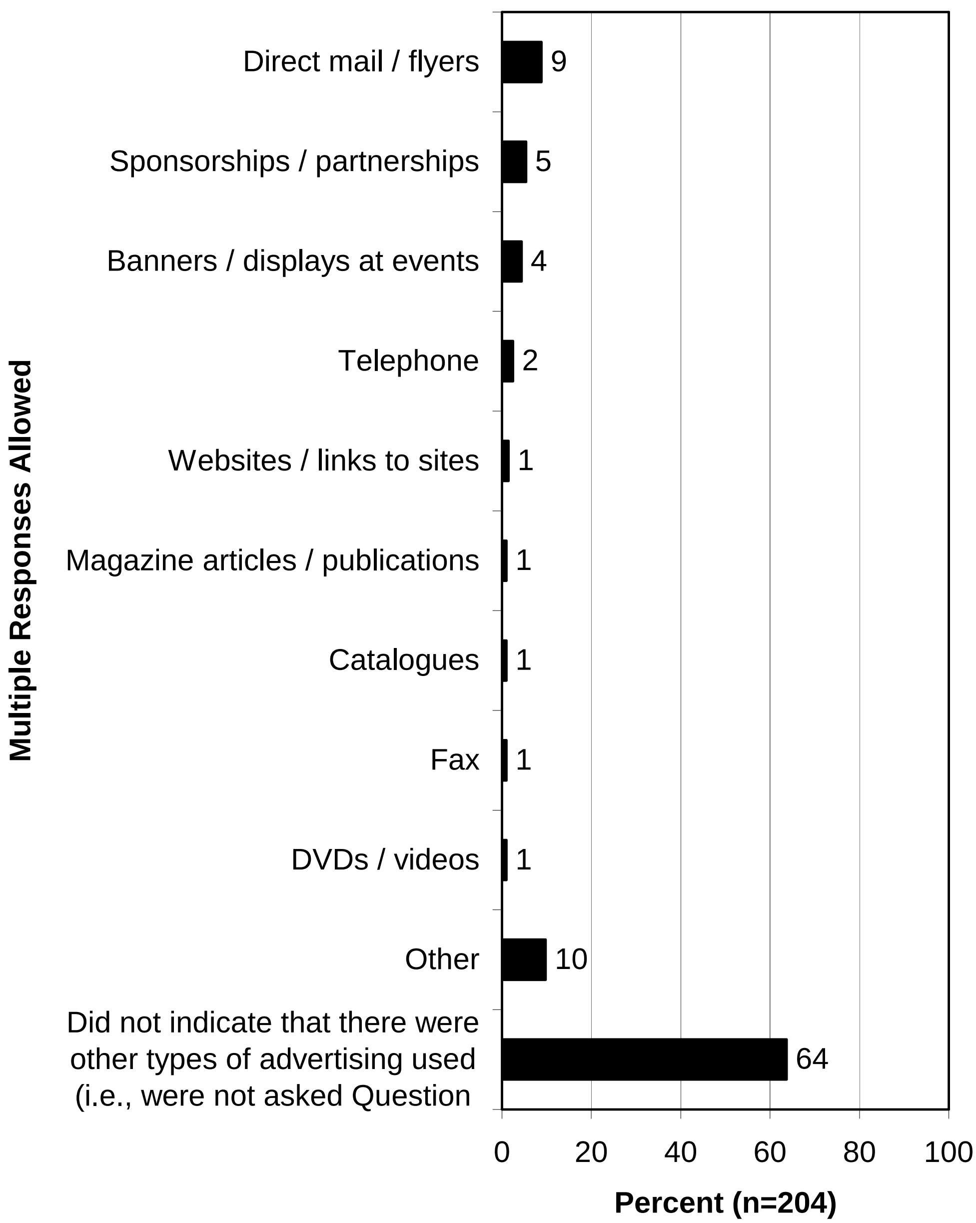
Exhibitors Survey



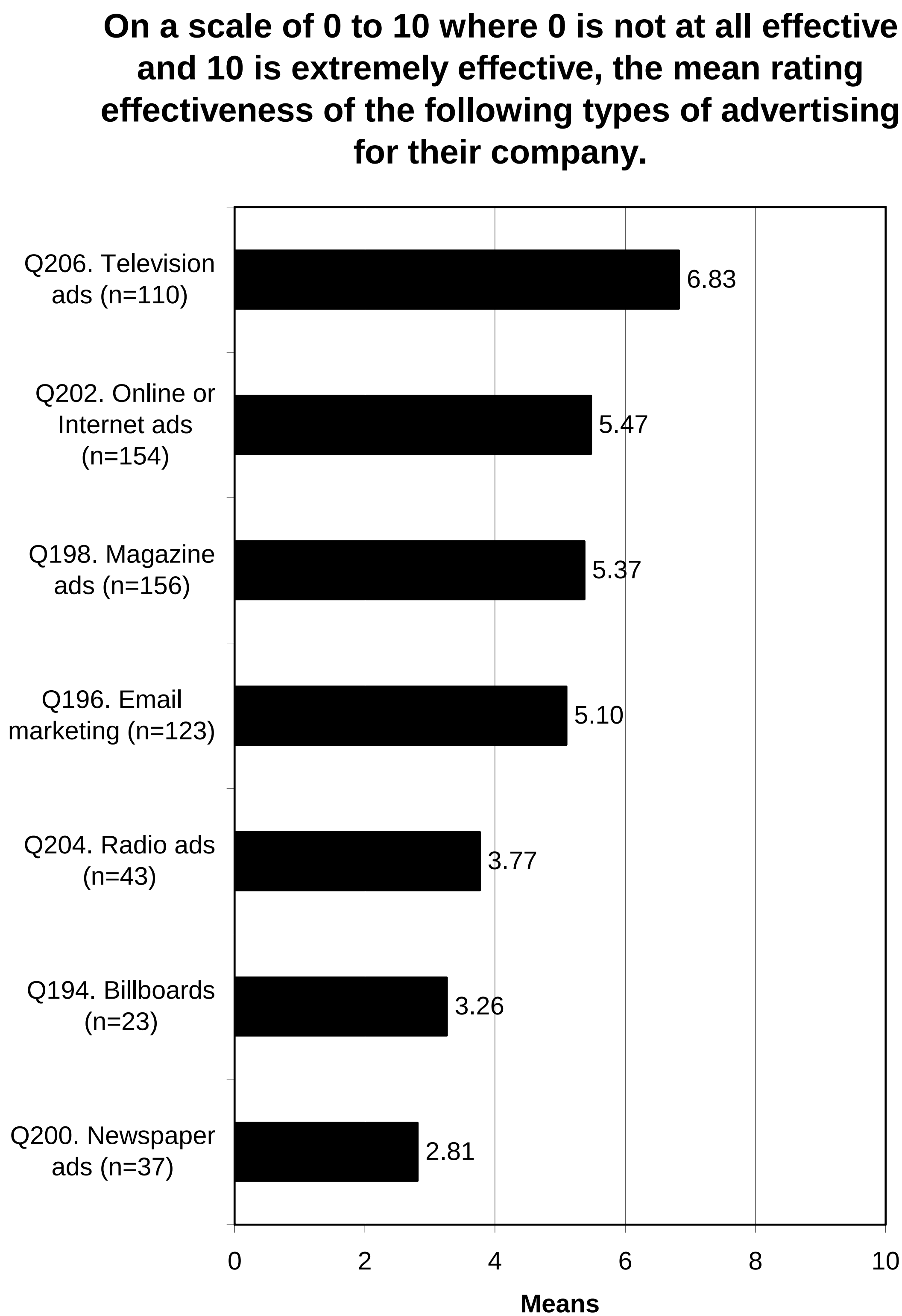
Exhibitors Survey

Q189. Are there any other types of advertising your company uses?

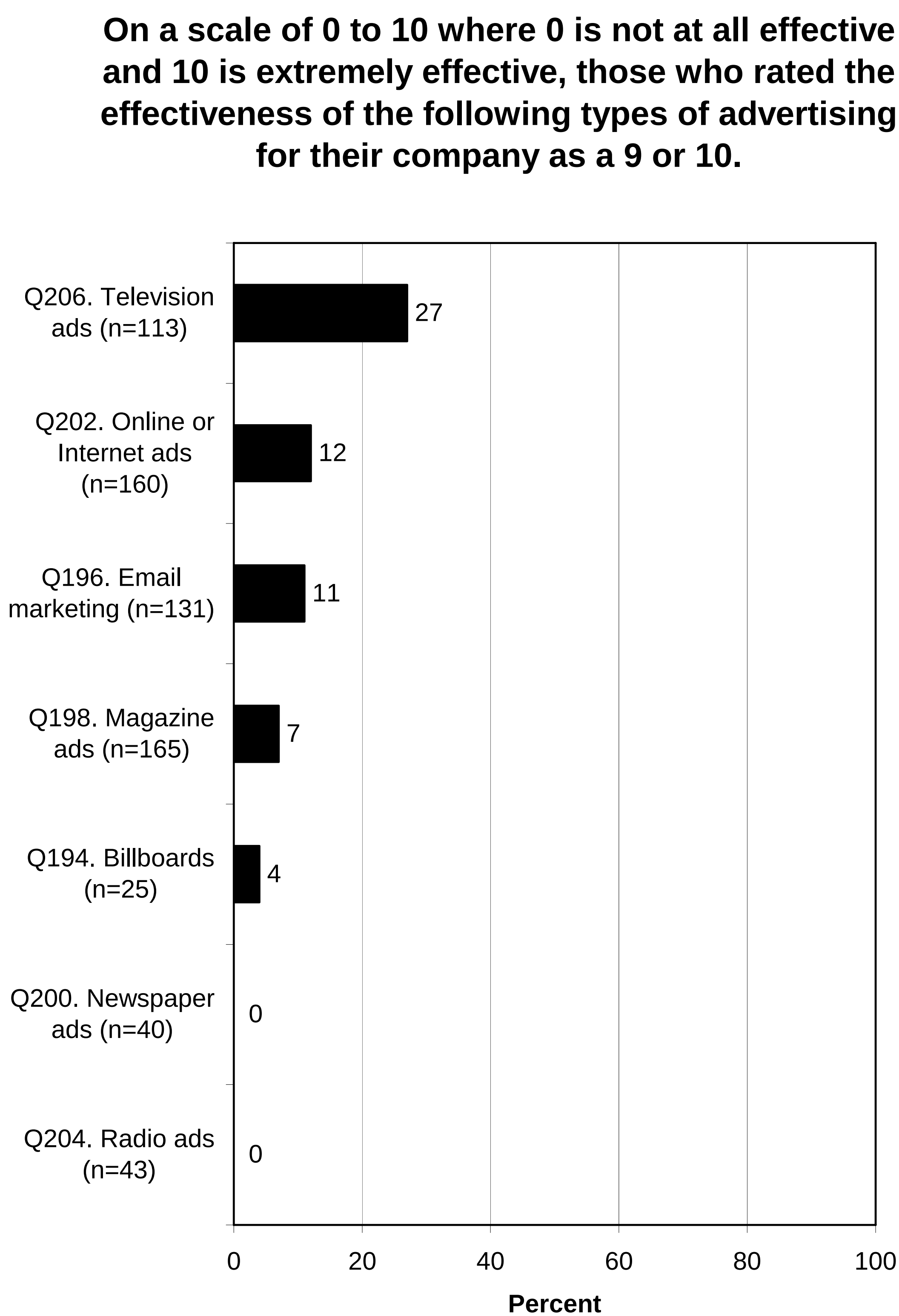
Q190. What other types of advertising does your company use?



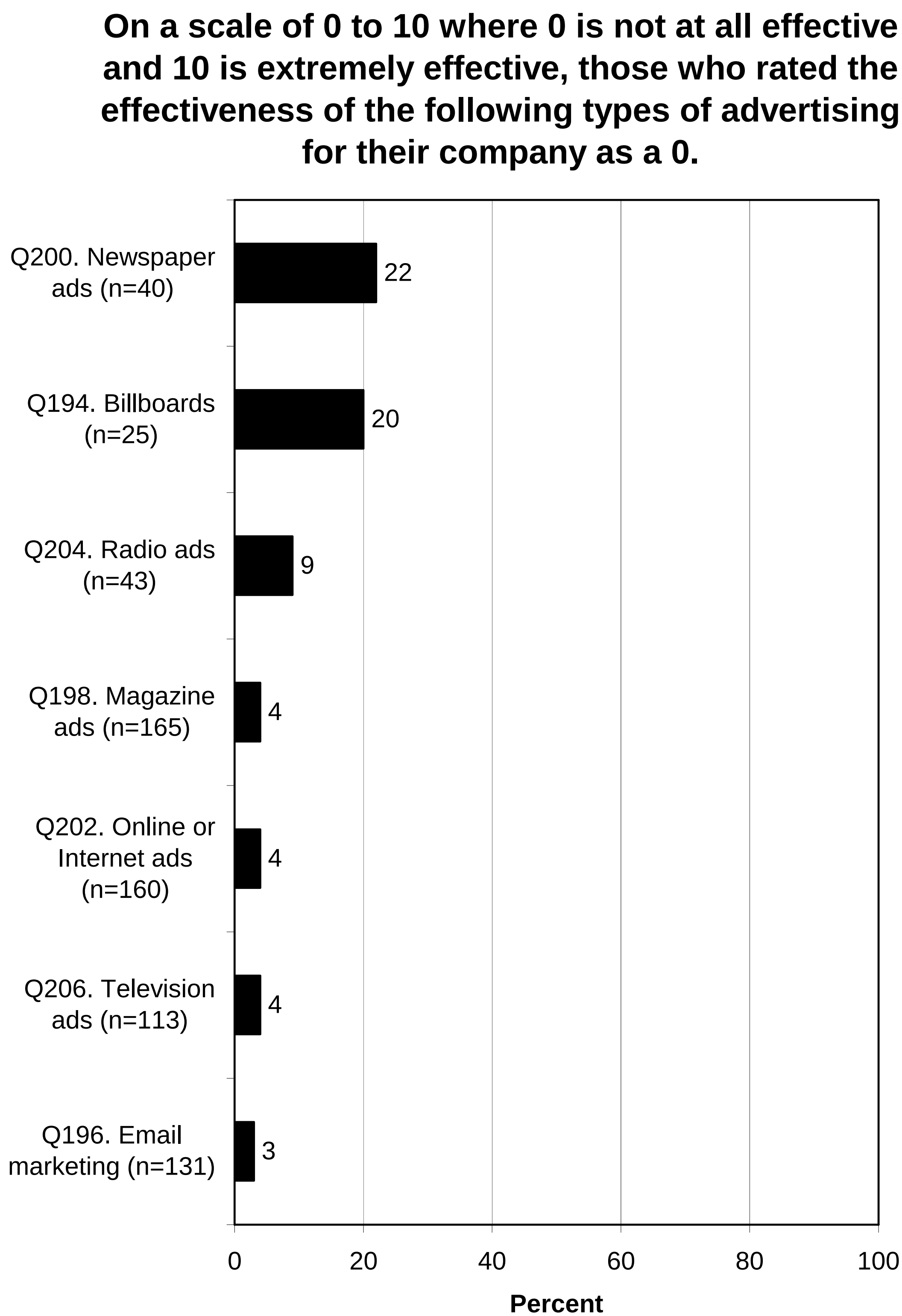
Exhibitors Survey



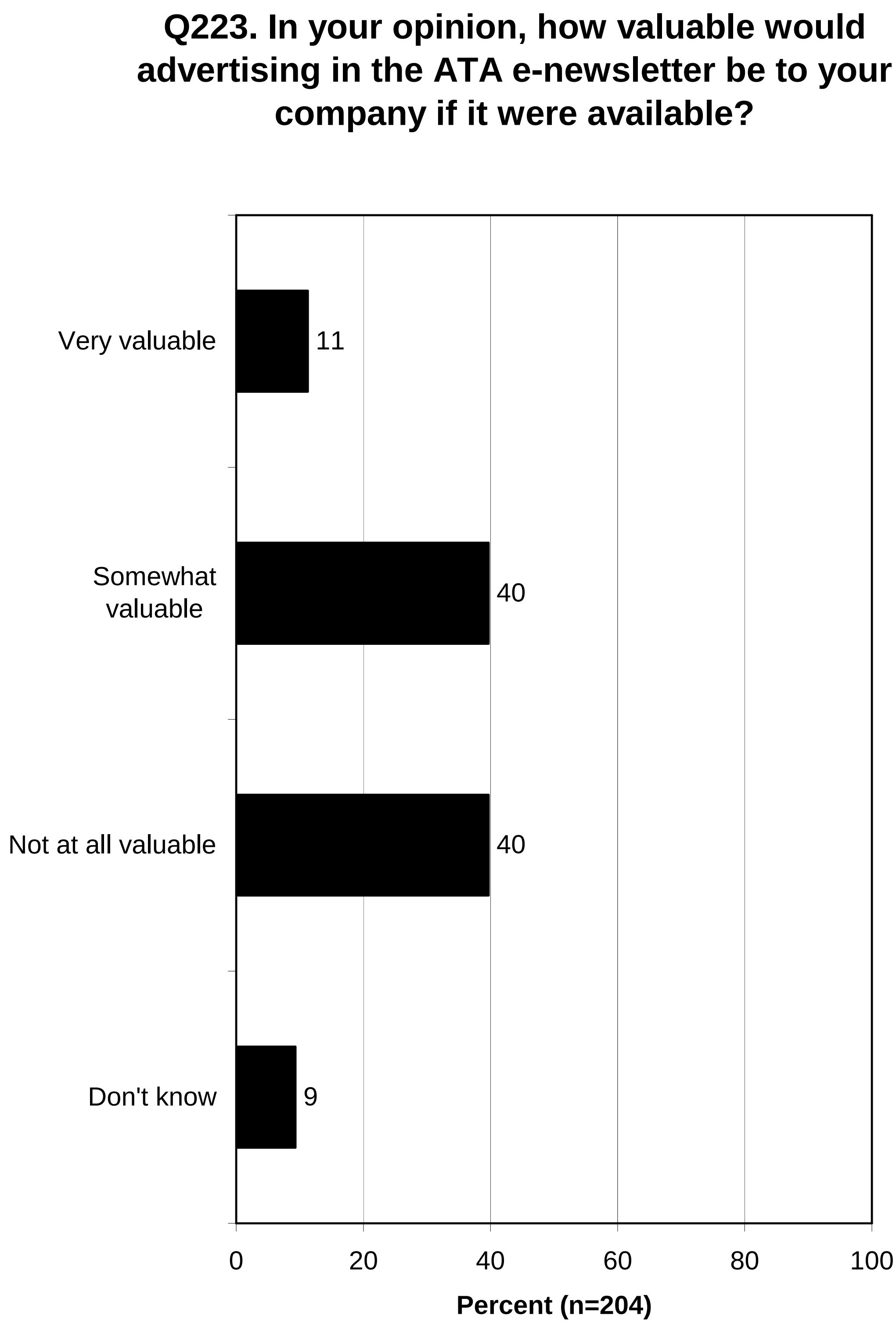
Exhibitors Survey



Exhibitors Survey

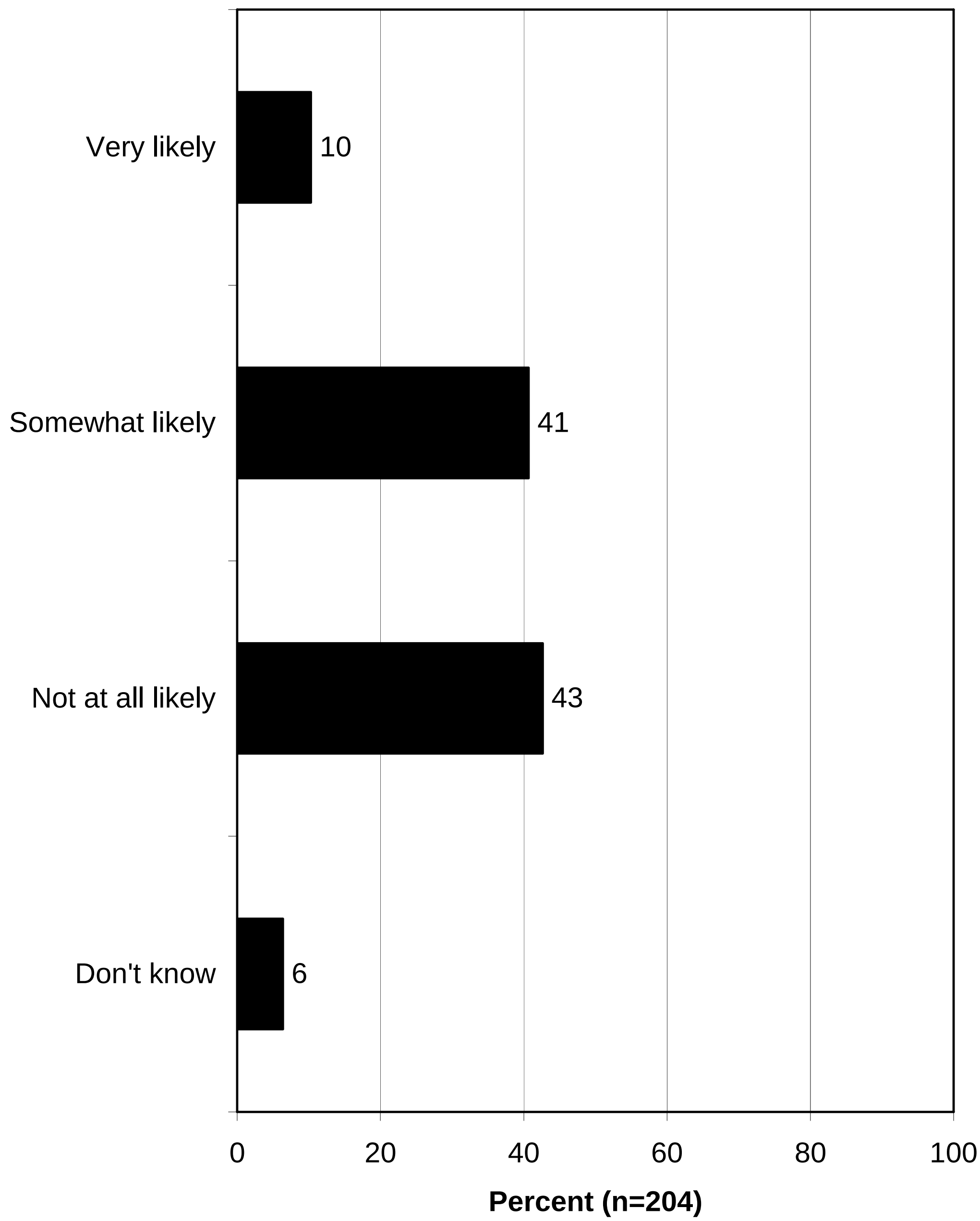


Exhibitors Survey



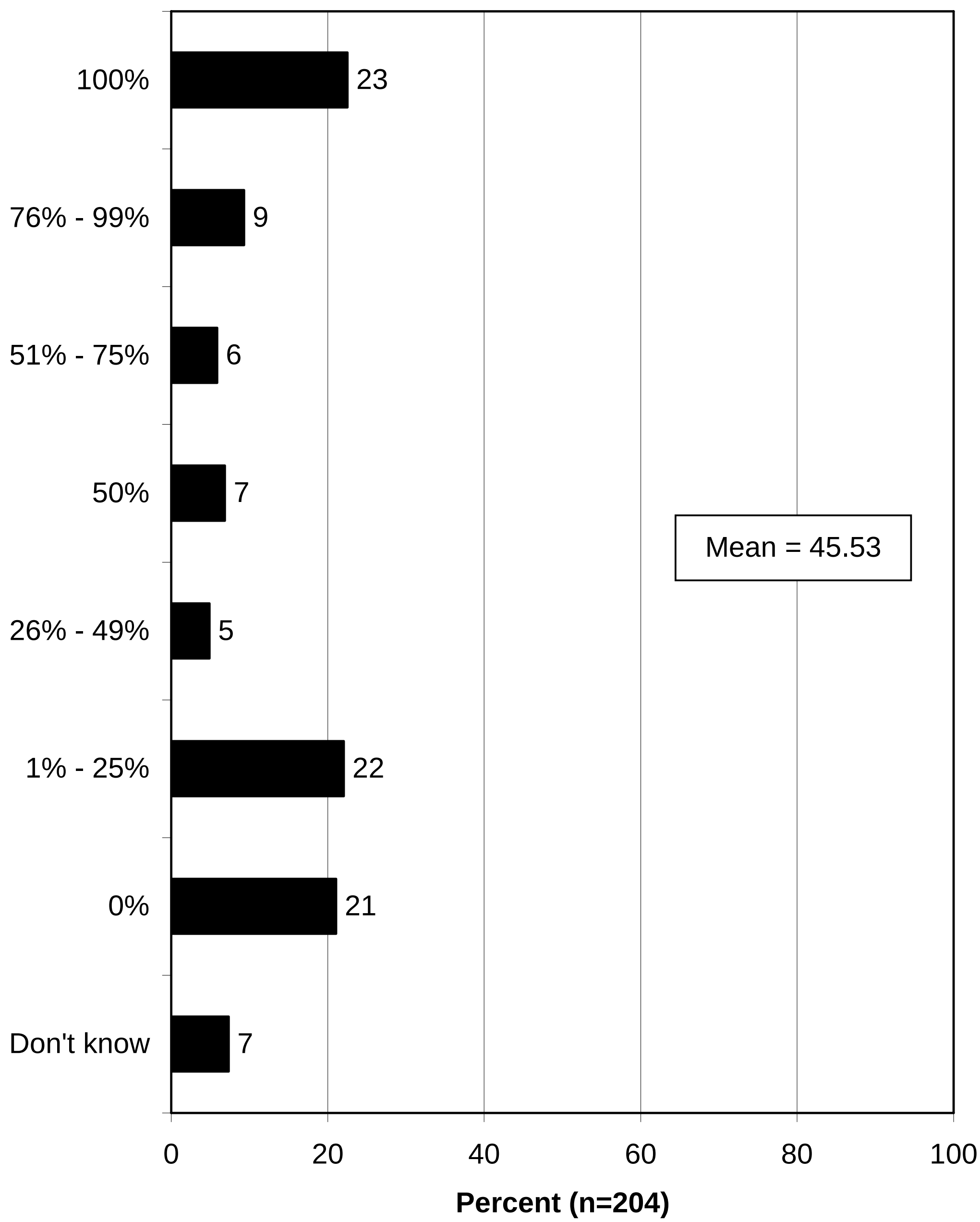
Exhibitors Survey

Q224. If advertising was available in the ATA e-newsletter, how likely would your company be to advertise in the e-newsletter?

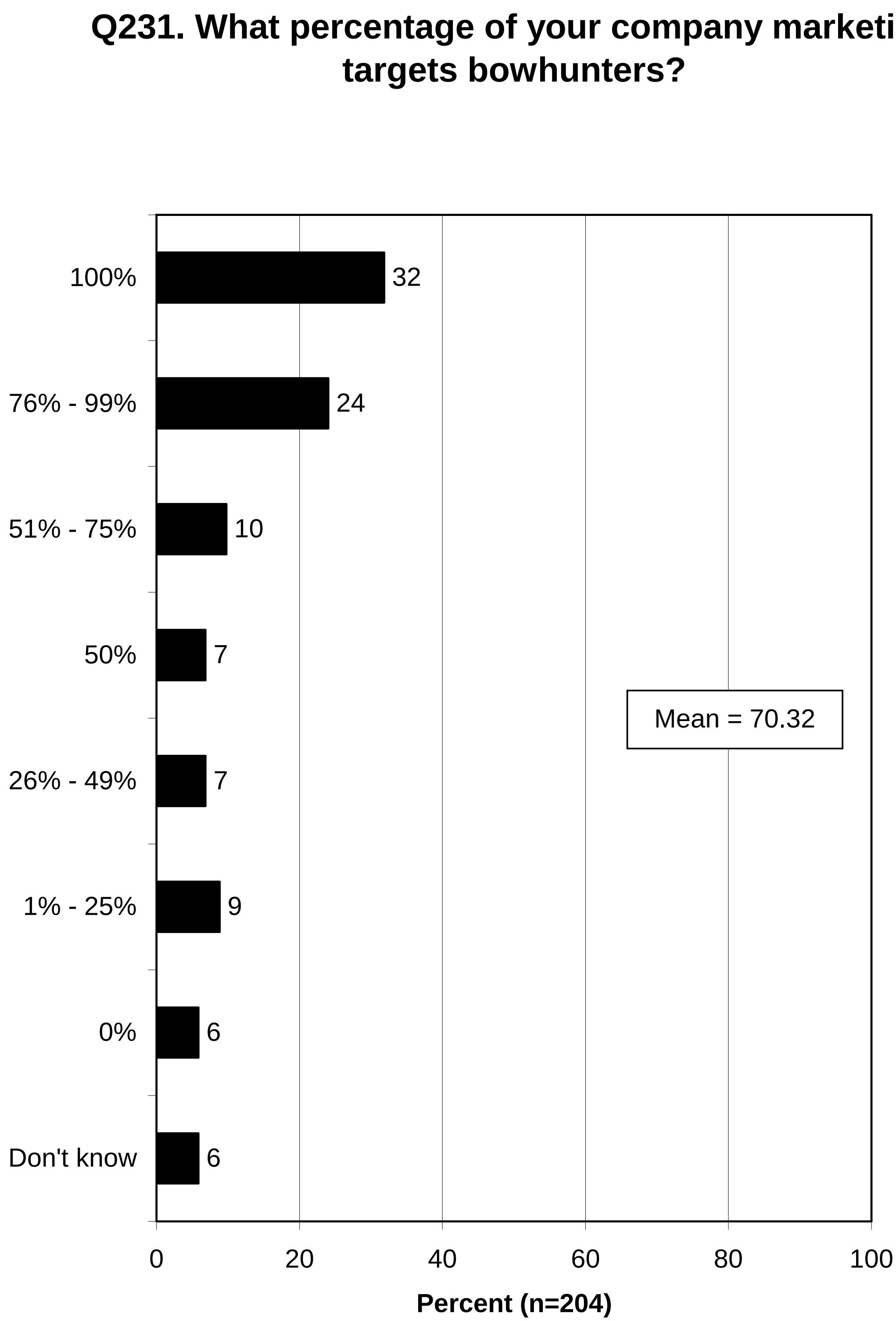


Exhibitors Survey

Q229. What percentage of your company marketing targets archers?



Exhibitors Survey



INFORMATION ABOUT RETAILERS AND EXHIBITORS SURVEYED

- Both surveys asked about membership in the ATA.
  - A majority of retailers surveyed are members of the ATA (59%).
  - An overwhelming majority of exhibitors are members (or their companies are members) of the ATA (93%).

- A little less than half of retailers surveyed (44%) are members of a buying group. The most common buying groups are NABA; ARRO; Sports, Inc.; and NBS.
  - All retailers were asked to name the percentage of their store products and merchandise that they purchase through a buying group (those not in a buying group could answer none). The majority (53%) answered none. Otherwise, about a third (31%) buy half or more of their merchandise through a buying group.

- Retailers were asked how much of their store merchandise is purchased through a distributor such as Kinsey's, Pape's, Jake's, or H & H. The mean is 44.8 percent.

- The exhibitor survey asked respondents to indicate the percentage of their annual product sales orders that are written at the ATA Trade Show: the large majority (78%) give an answer of 25 percent or less; the mean is 9.1 percent. With similar results, the survey also asked them to indicate the percentage of their annual contracts or business deals that occur at the ATA Trade Show: the large majority (69%) give an answer of 25 percent or less; the mean is 13.5 percent.

- A graph shows the number of years that retailers' companies have been in the archery retail business: 38% have been in the archery retail business for 10 years of less.

- Overwhelmingly, retailers in the survey represent just a single store (92%); nonetheless, 7% of retailers represent more than one store.

- A graph shows annual sales of retailers' companies represented in the survey; they vary widely. The median is $300,000.

- Retailers were asked what percentage of their store's annual sales are accounted for by archery and bowhunting products and equipment: the mean is 66.3 percent. Nearly a third of stores (34%) do all their sales in archery and bowhunting products and equipment.

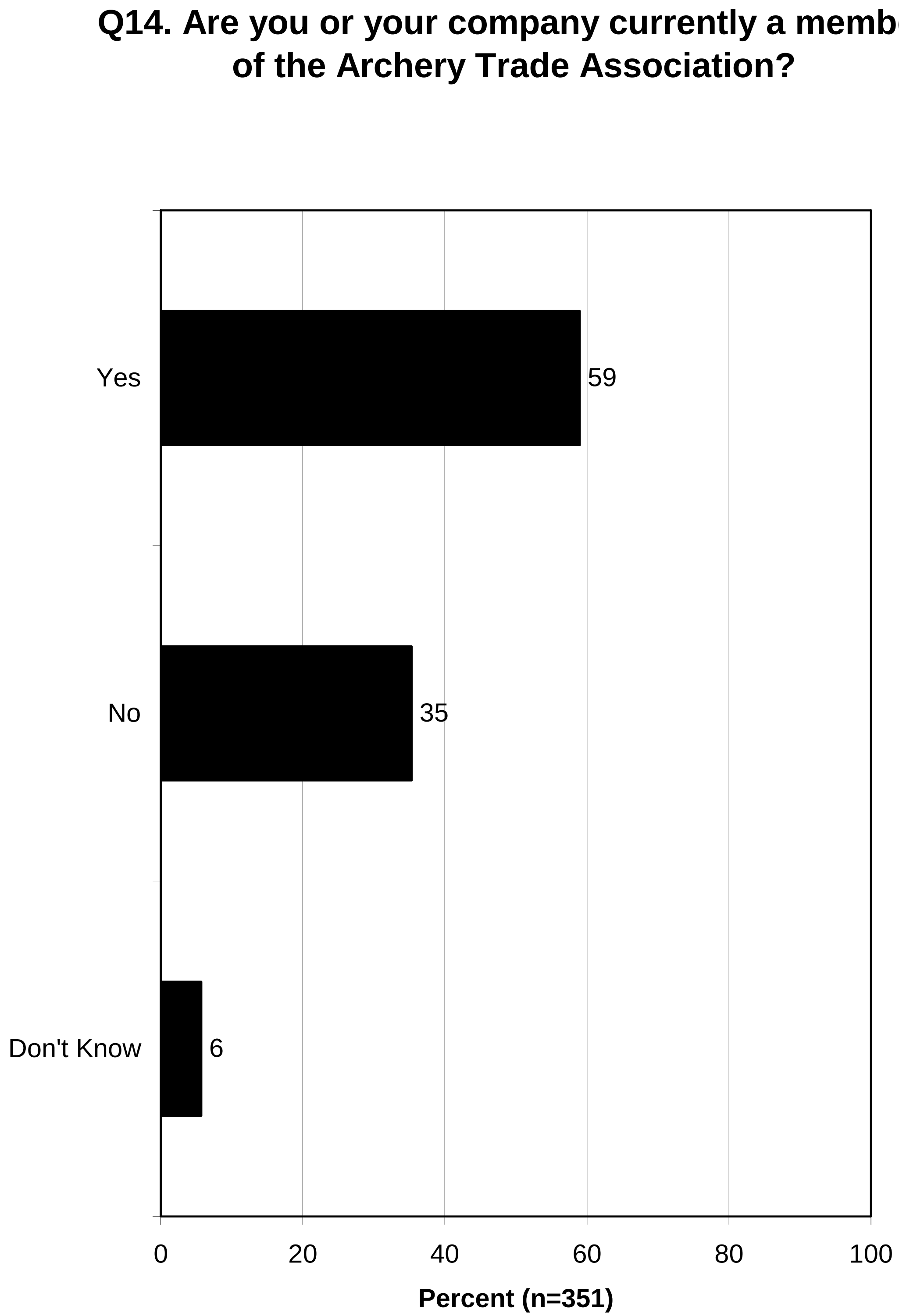
- The numbers of full-time and part-time employees are shown in graphs. The majority of stores (52%) have no more than two full-time employees (including those with no full-time employees), and a majority (62%) have no more than two part-time employees (including those with no part-time employees).

- A little more than a quarter (26%) of stores offered health insurance to employees in 2008.
  - The most common reason for *not* offering health insurance is being financially unable to do so. Many indicated not having any full-time employees that would qualify or that employees have insurance through other means (e.g., through another job, through their spouse).

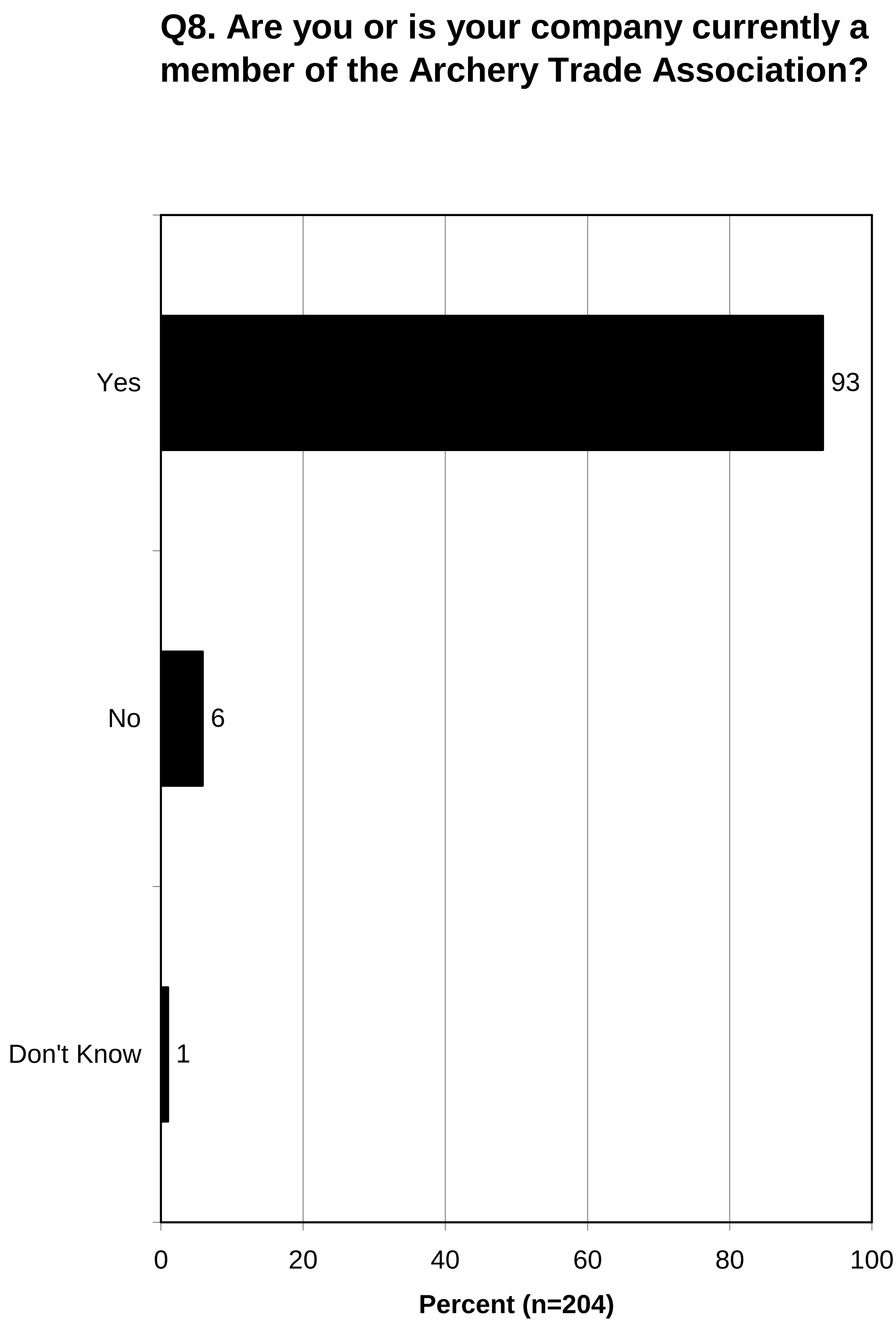
- Another question asked about health insurance for the owner himself/herself. Most commonly, their own health insurance was provided by another employer. Nonetheless, 38% of those whose company did not offer health insurance to employees said that they had health insurance for themselves through the business.

- The survey also asked retailers to indicate if they considered themselves to be primarily an archer, primarily a bowhunter, or both about equally. Most commonly, they considered themselves to be both about equally (49%). This was followed by considering themselves to be primarily a bowhunter (38%).

Retailers Survey

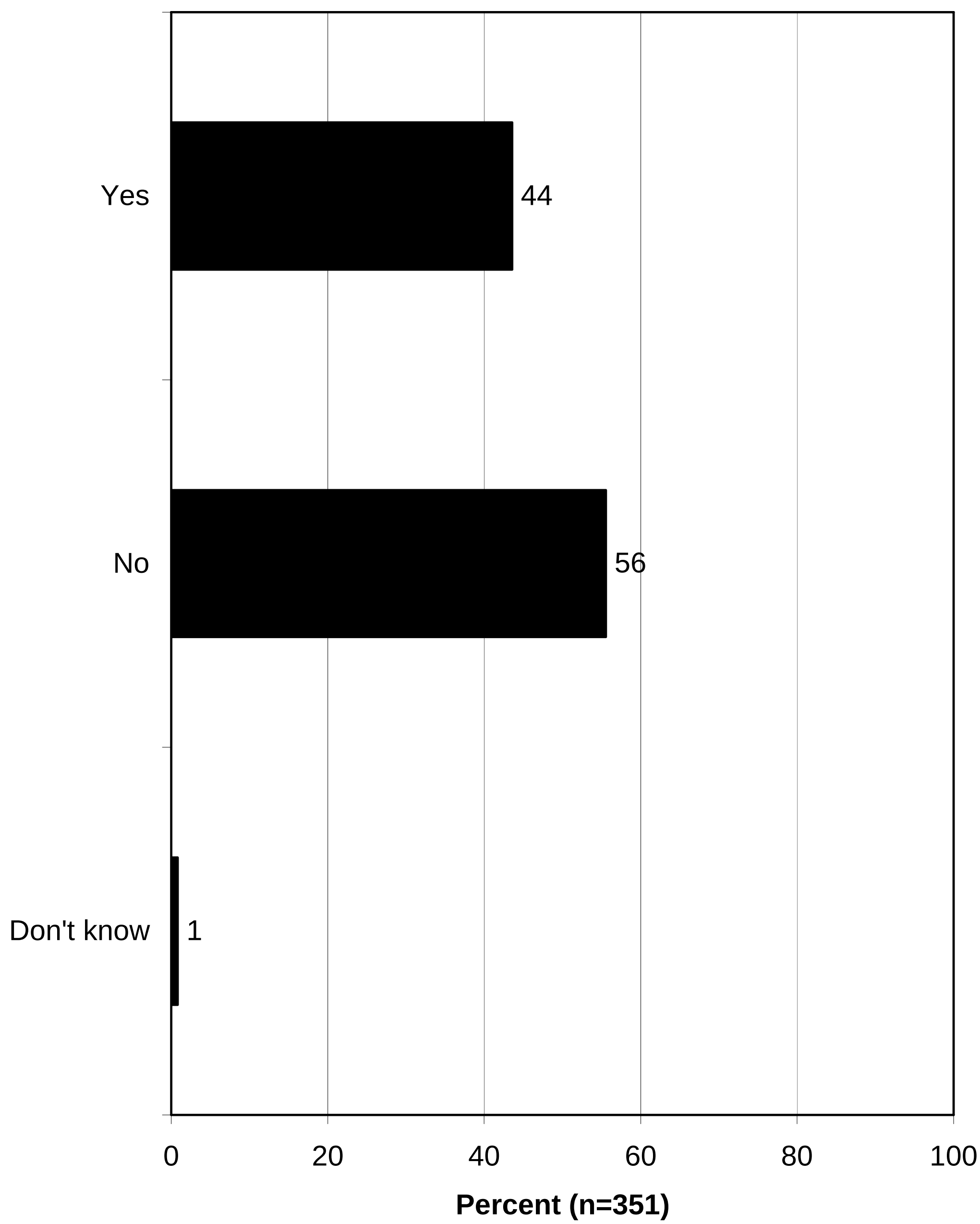


Exhibitors Survey

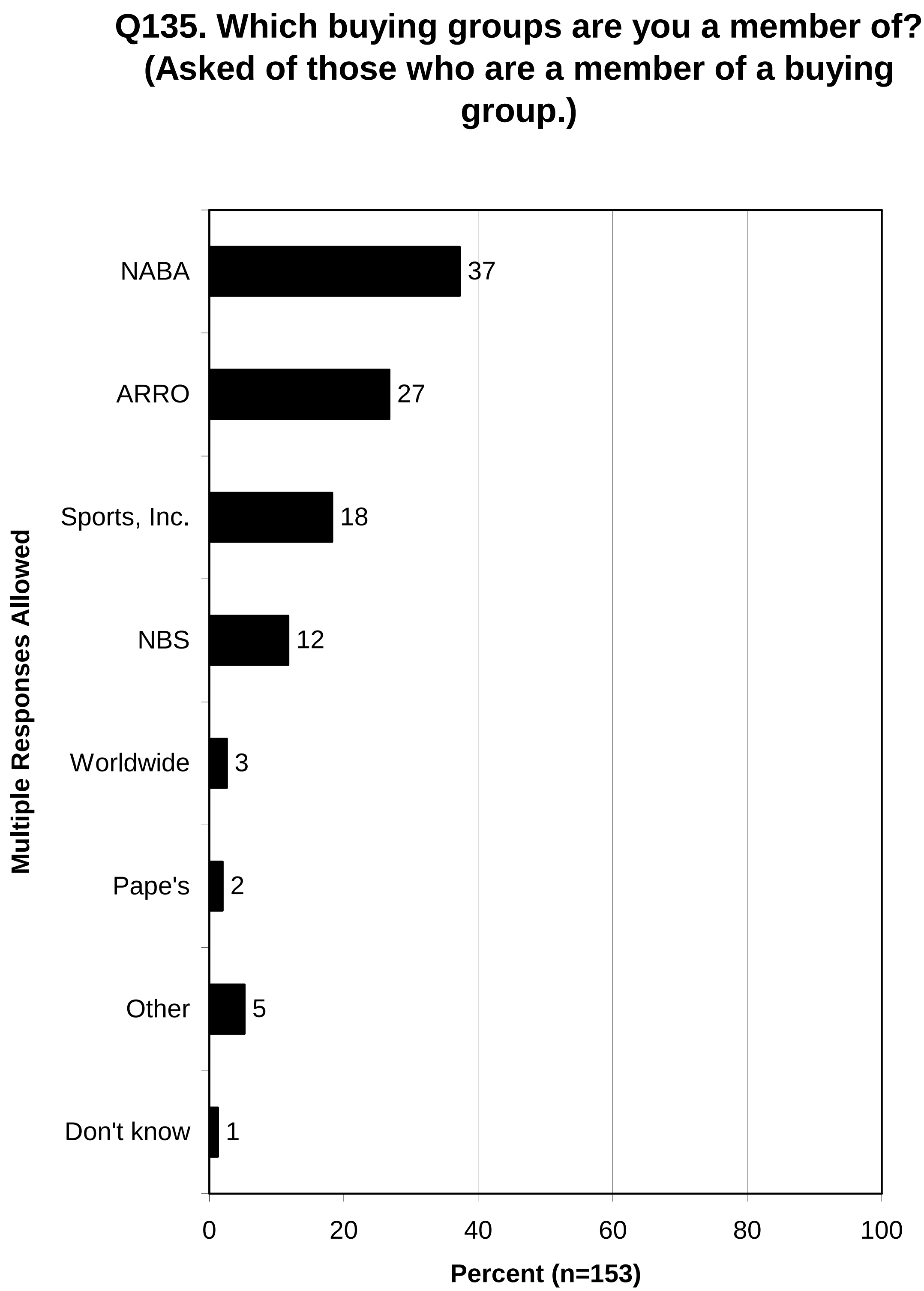


Retailers Survey

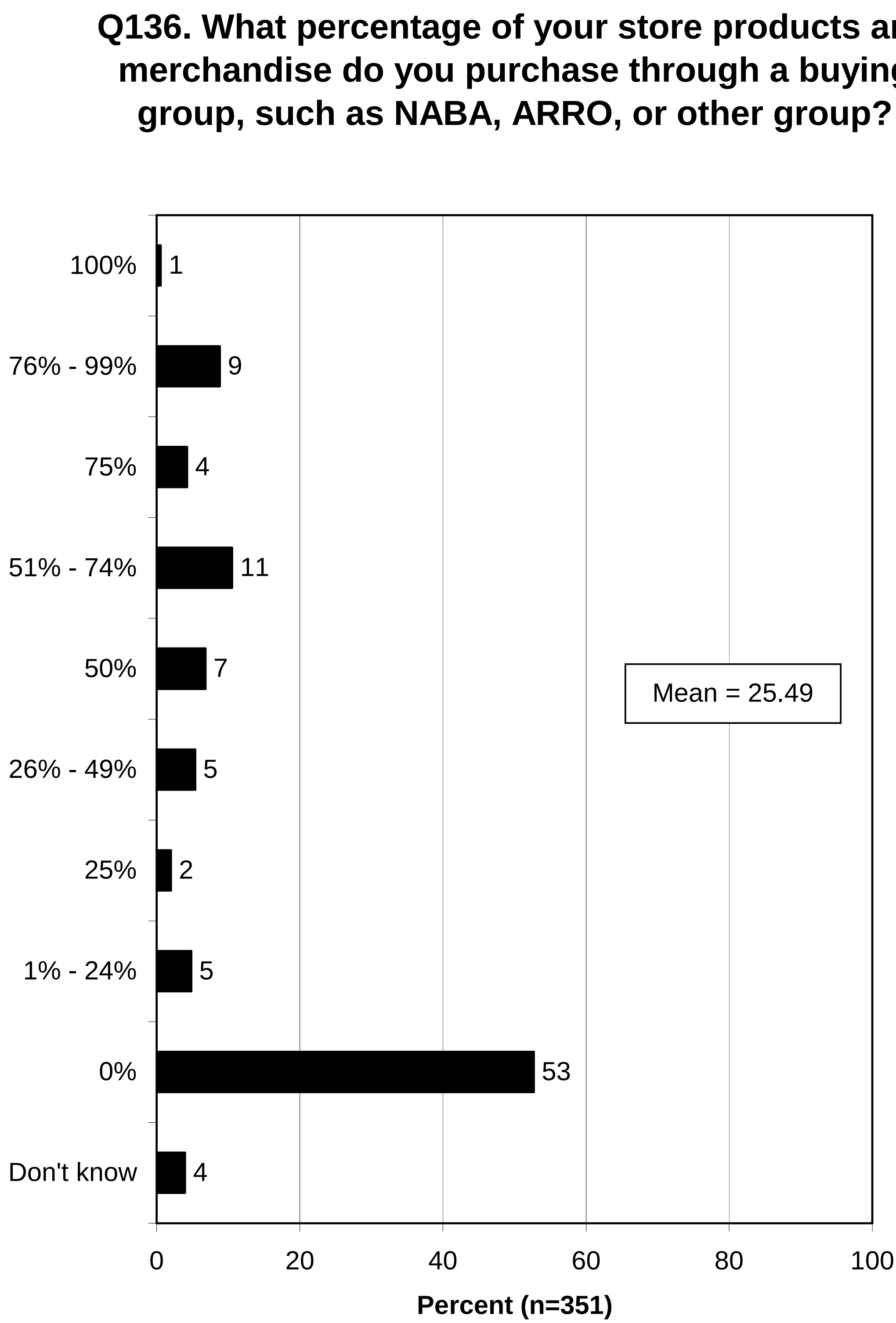
Q134. Are you a member of a buying group?



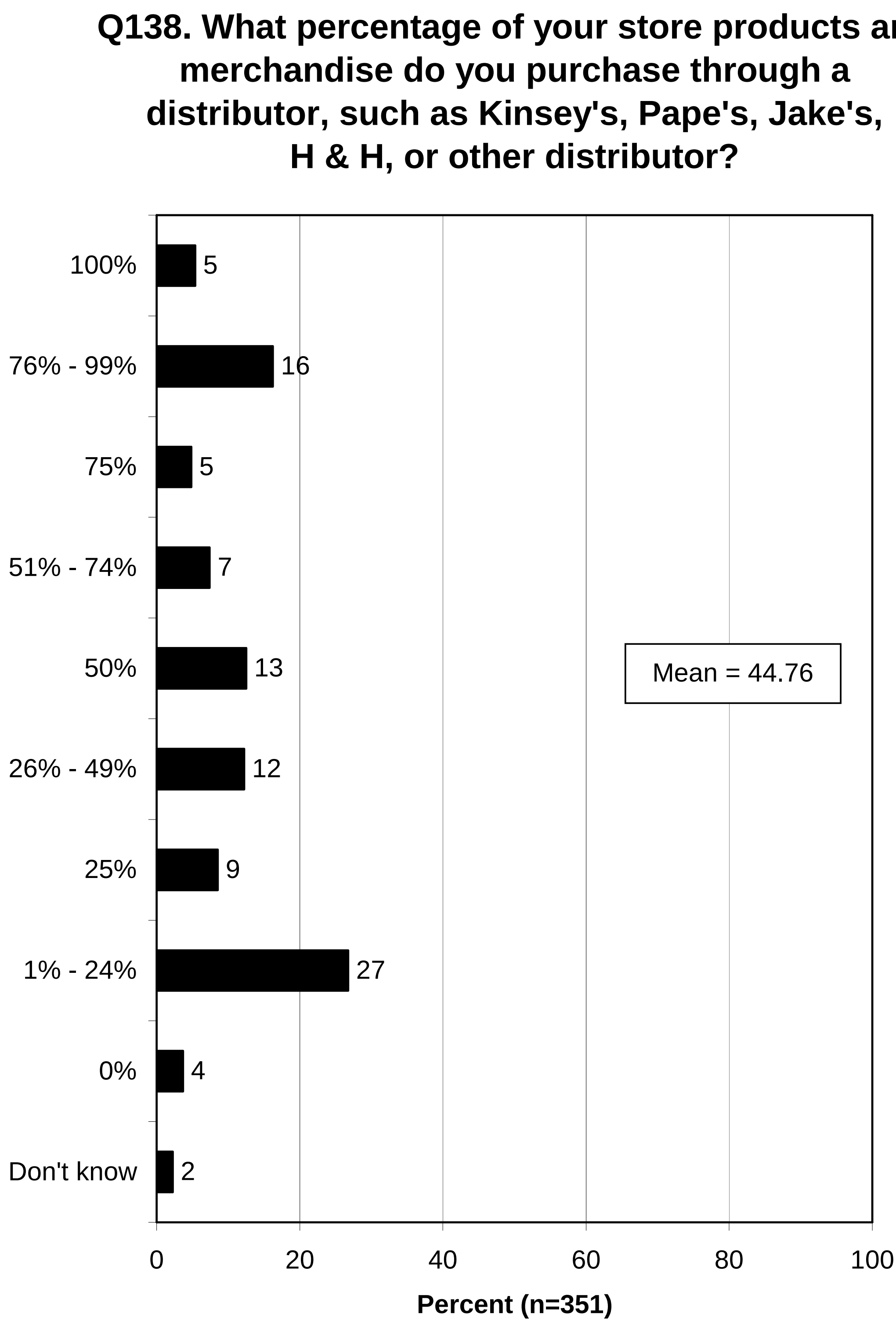
Retailers Survey



Retailers Survey

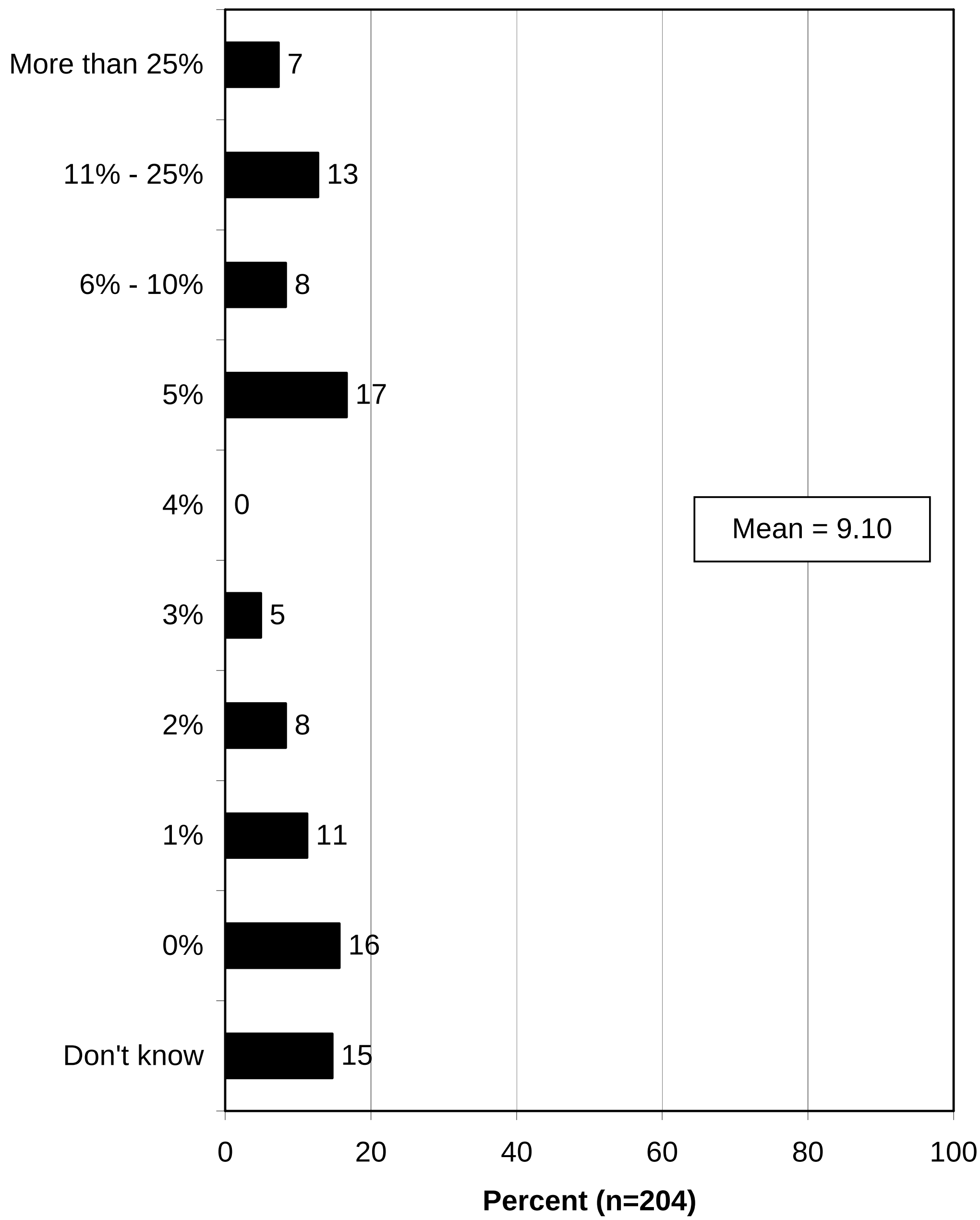


Retailers Survey



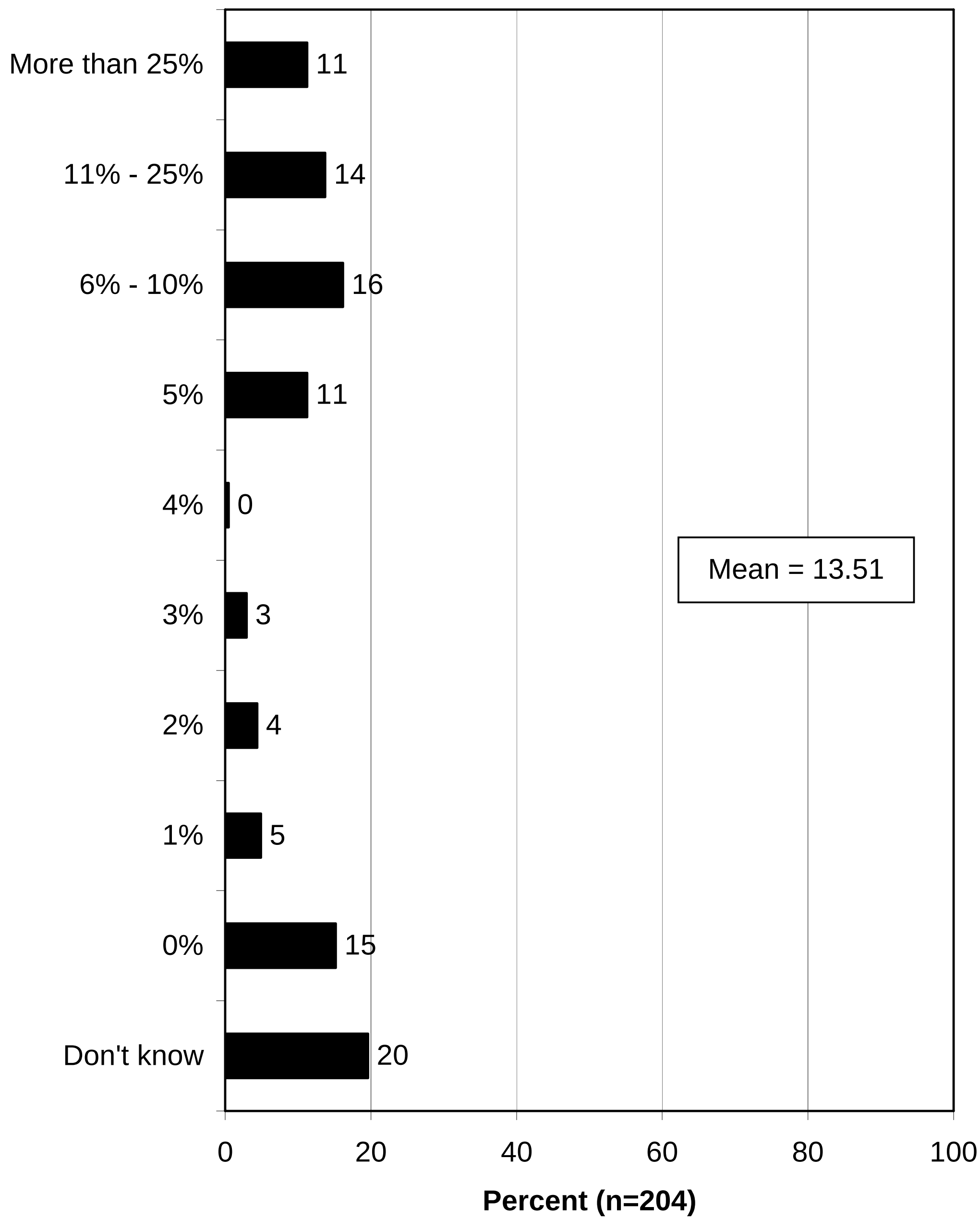
Exhibitors Survey

Q156. Typically, what percentage of your annual product sales orders are written at the ATA Trade Show? (Asked of those who have exhibited at any ATA Trade Show from 2003-2009.)

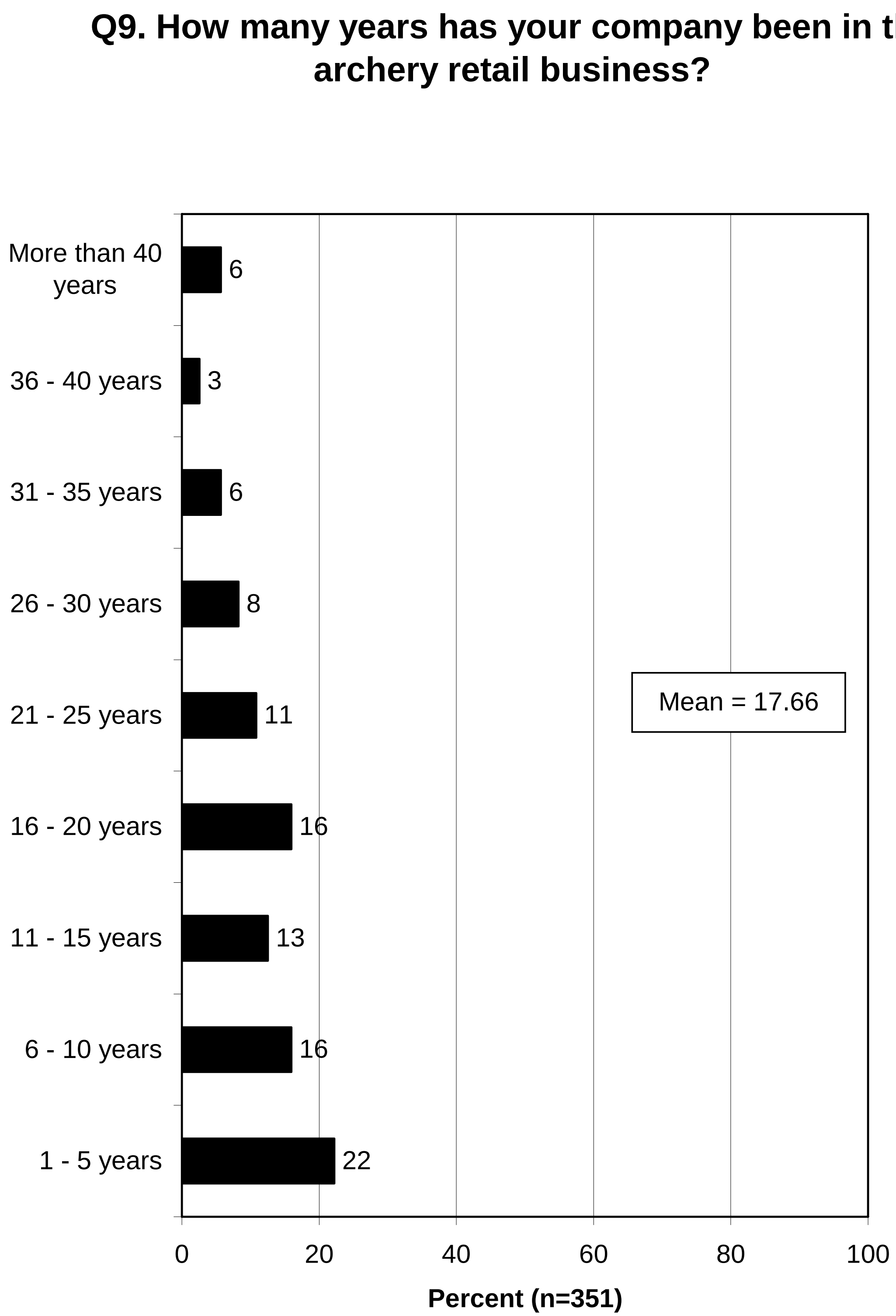


Exhibitors Survey

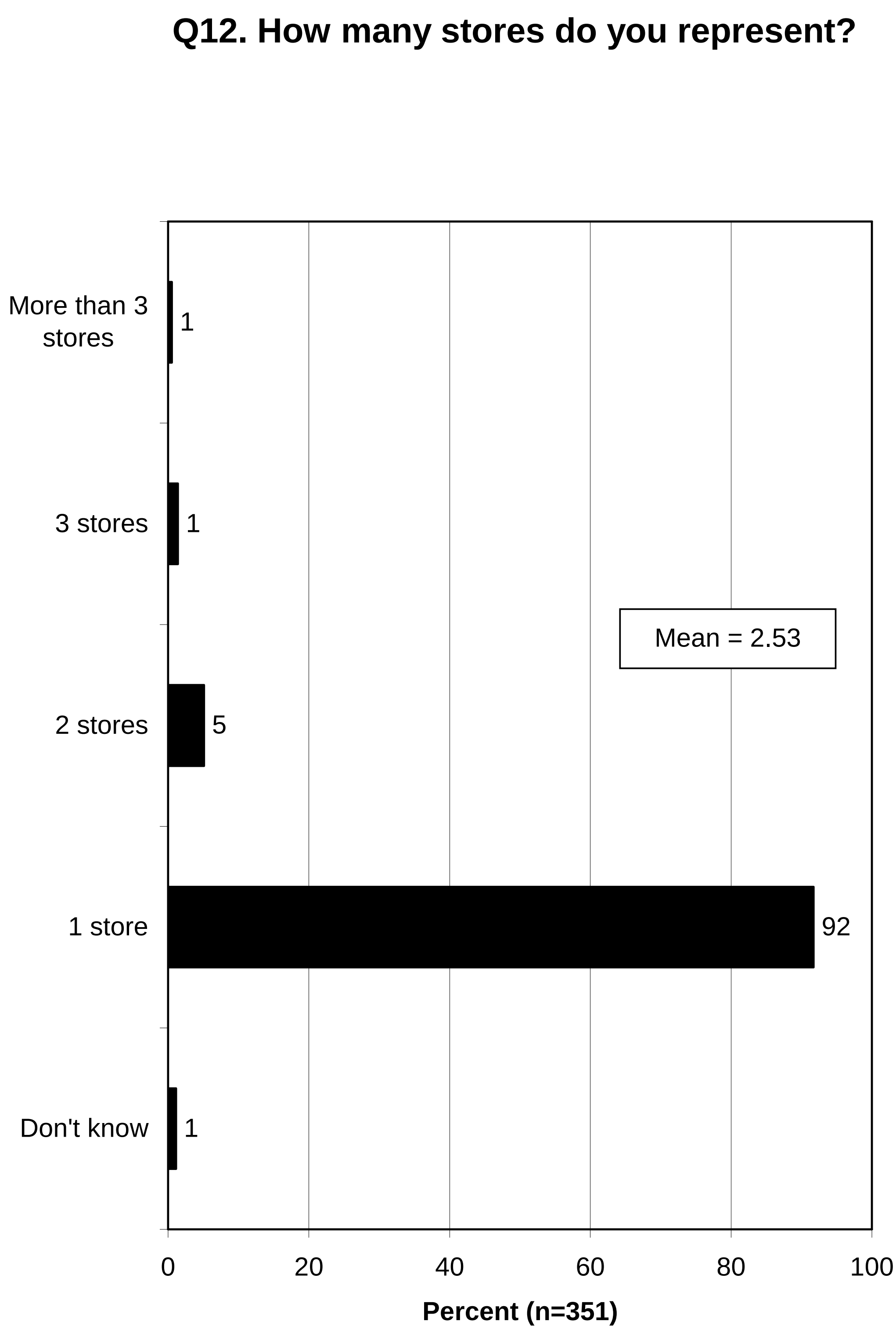
Q159. Typically, what percentage of your annual contracts or business deals occurs at the ATA Trade Show? (Asked of those who have exhibited at any ATA Trade Show from 2003-2009.)



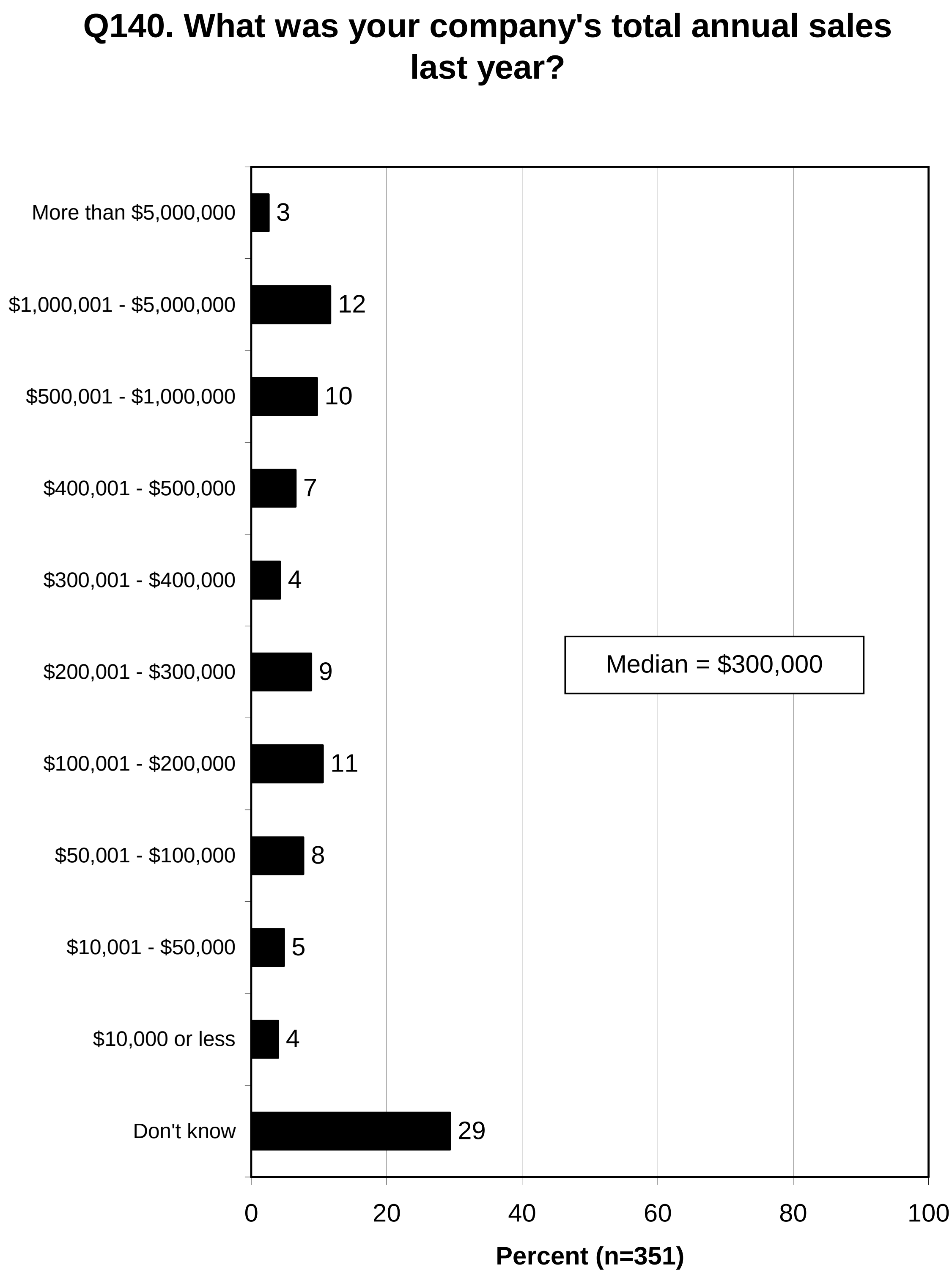
Retailers Survey



Retailers Survey

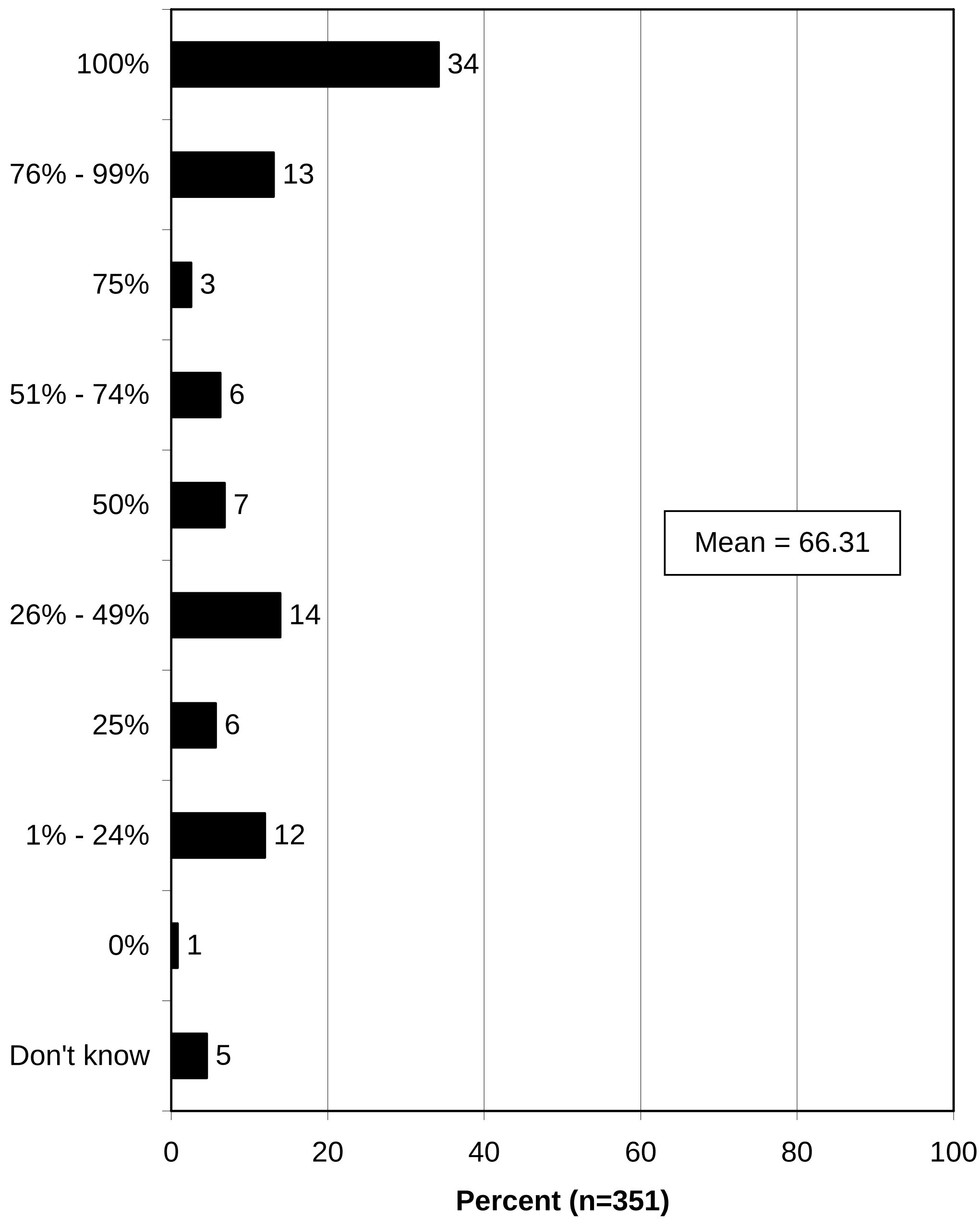


Retailers Survey

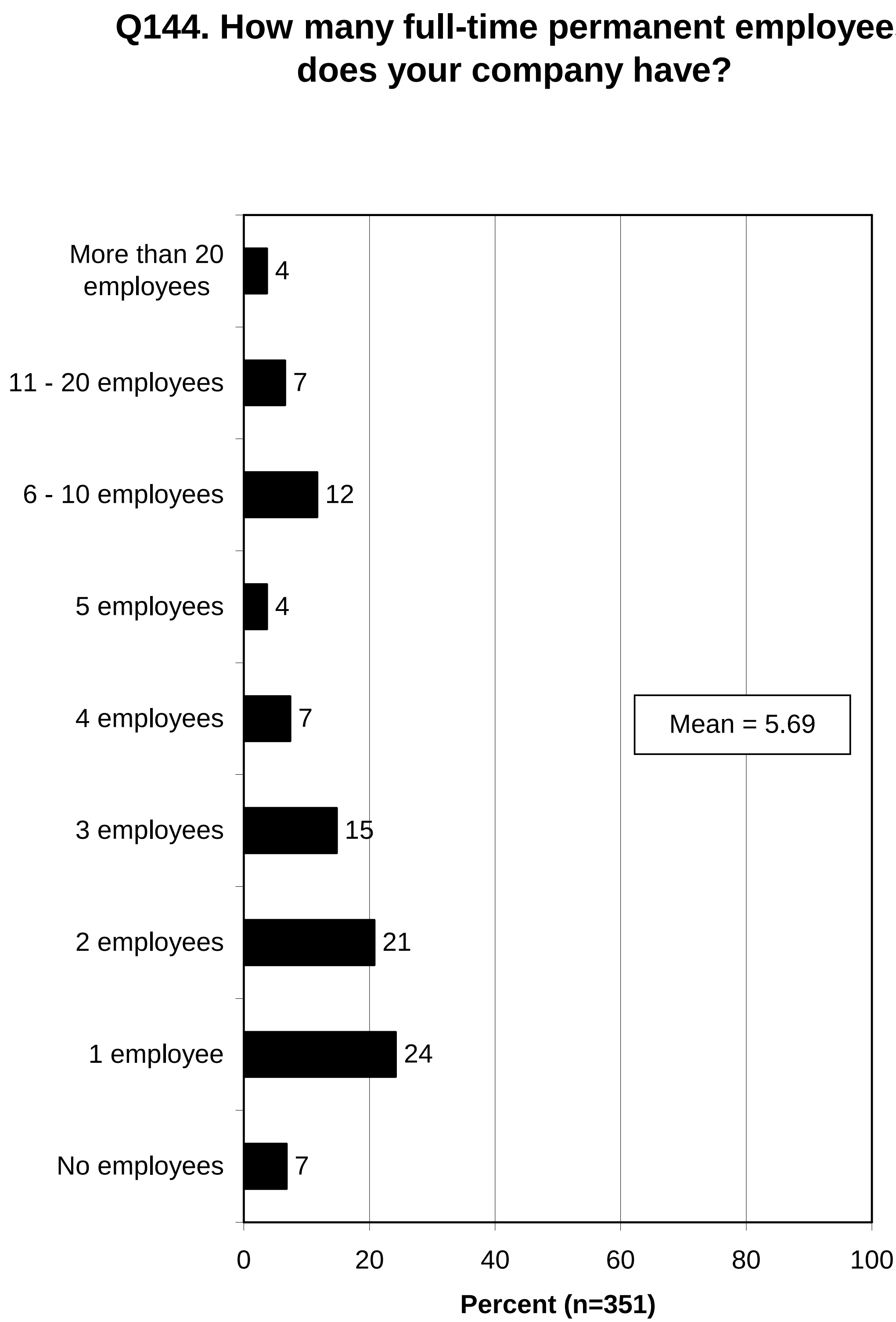


Retailers Survey

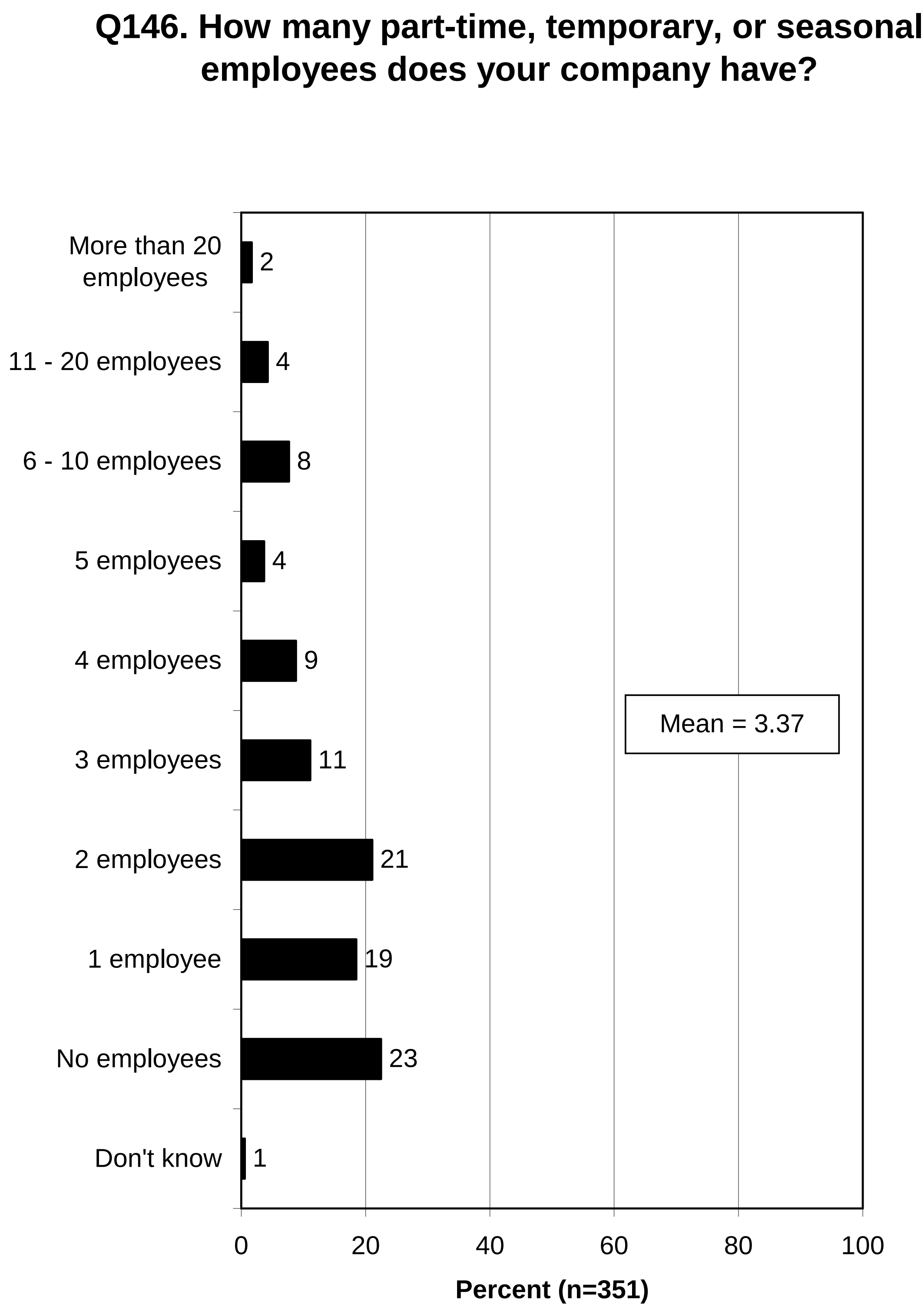
Q142. What percentage of your annual sales is archery and bowhunting products and equipment?



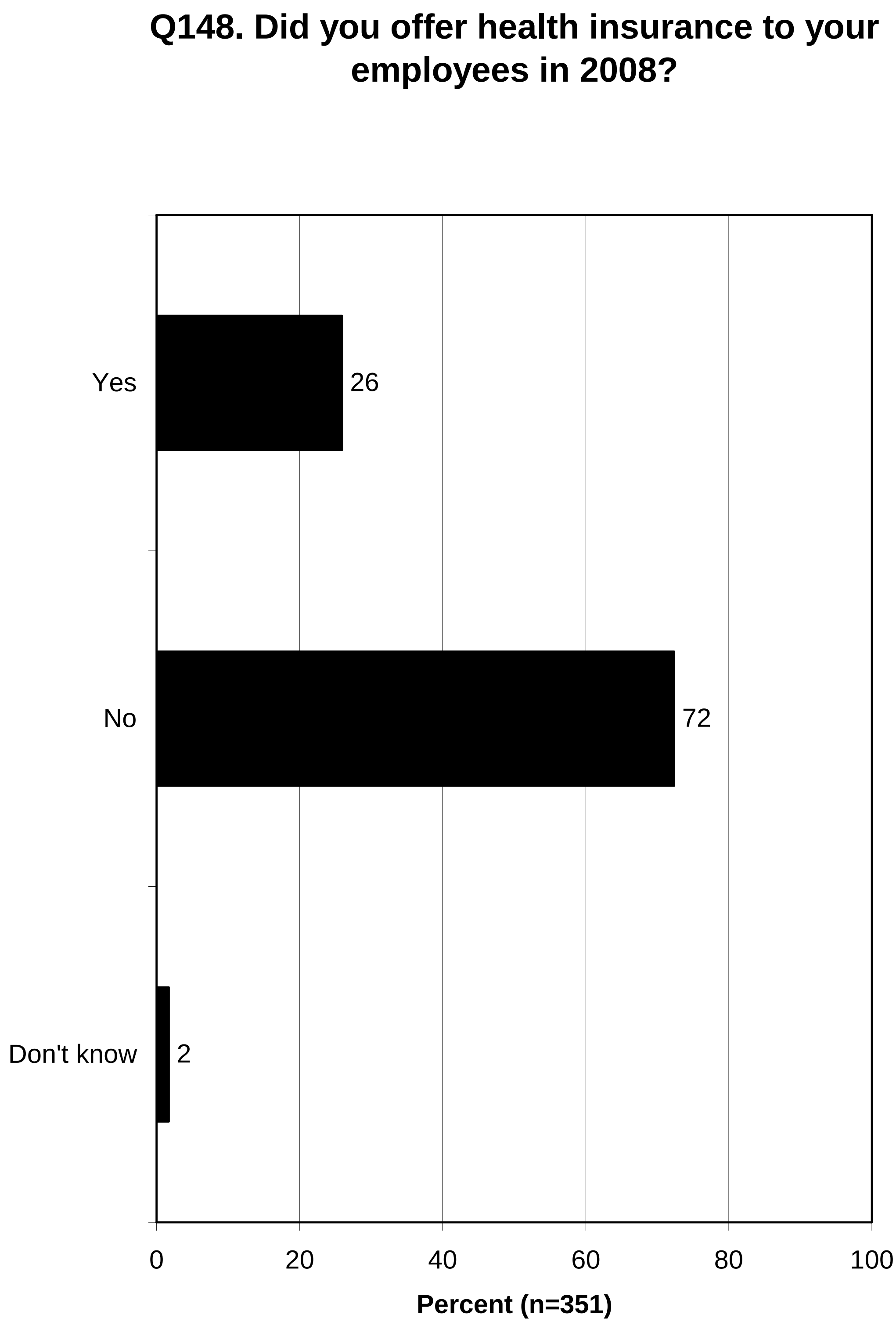
Retailers Survey



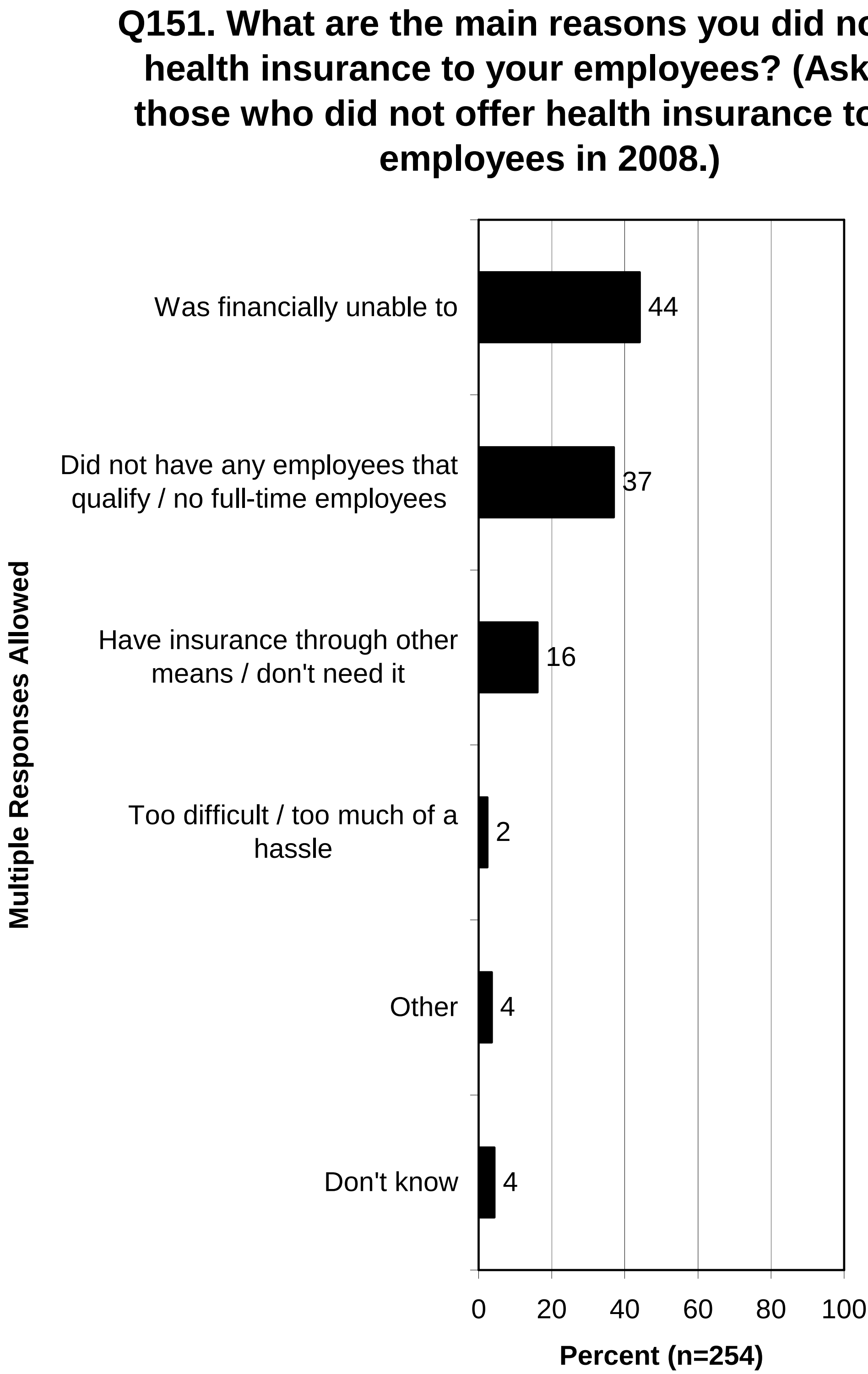
Retailers Survey



Retailers Survey

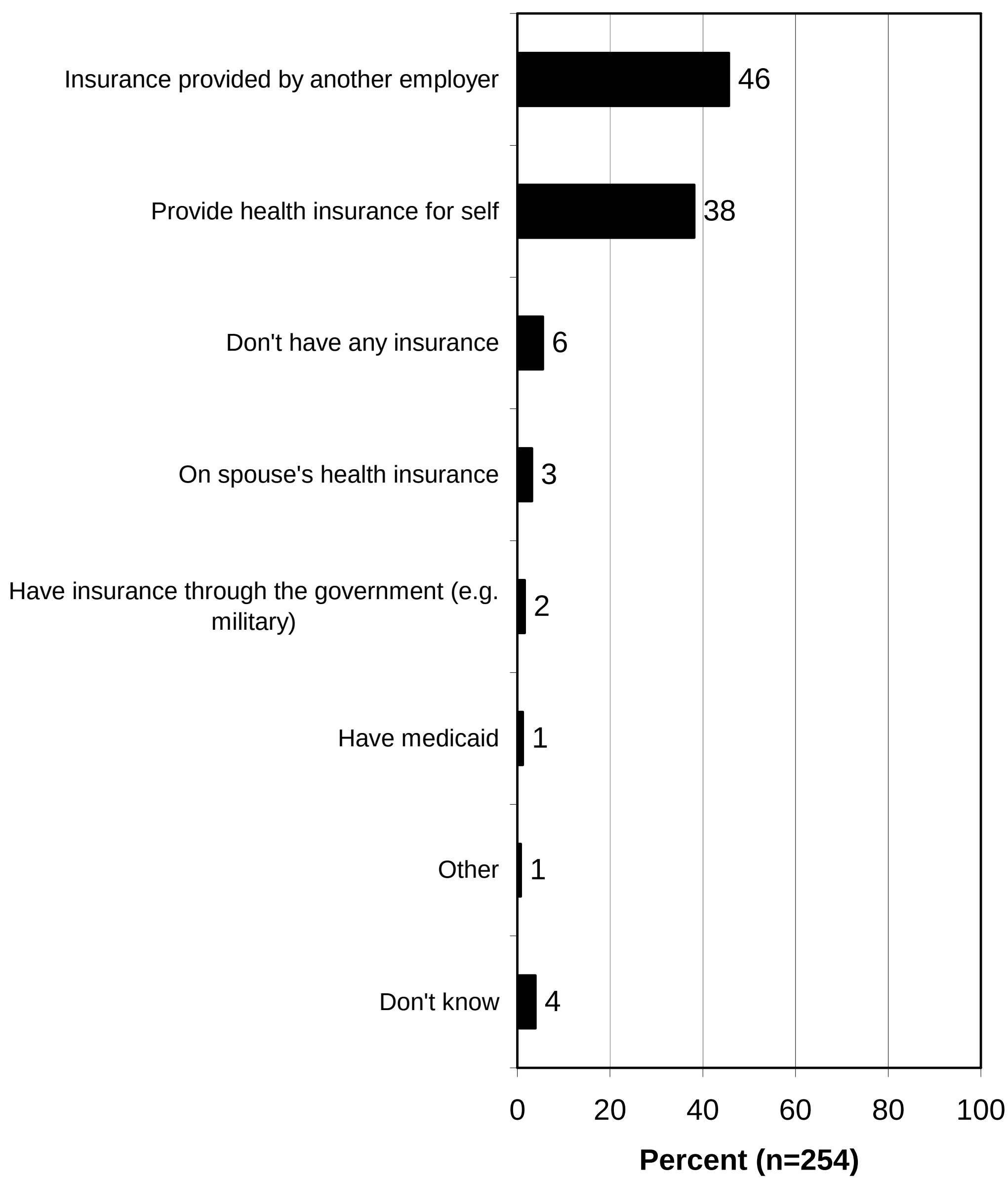


Retailers Survey



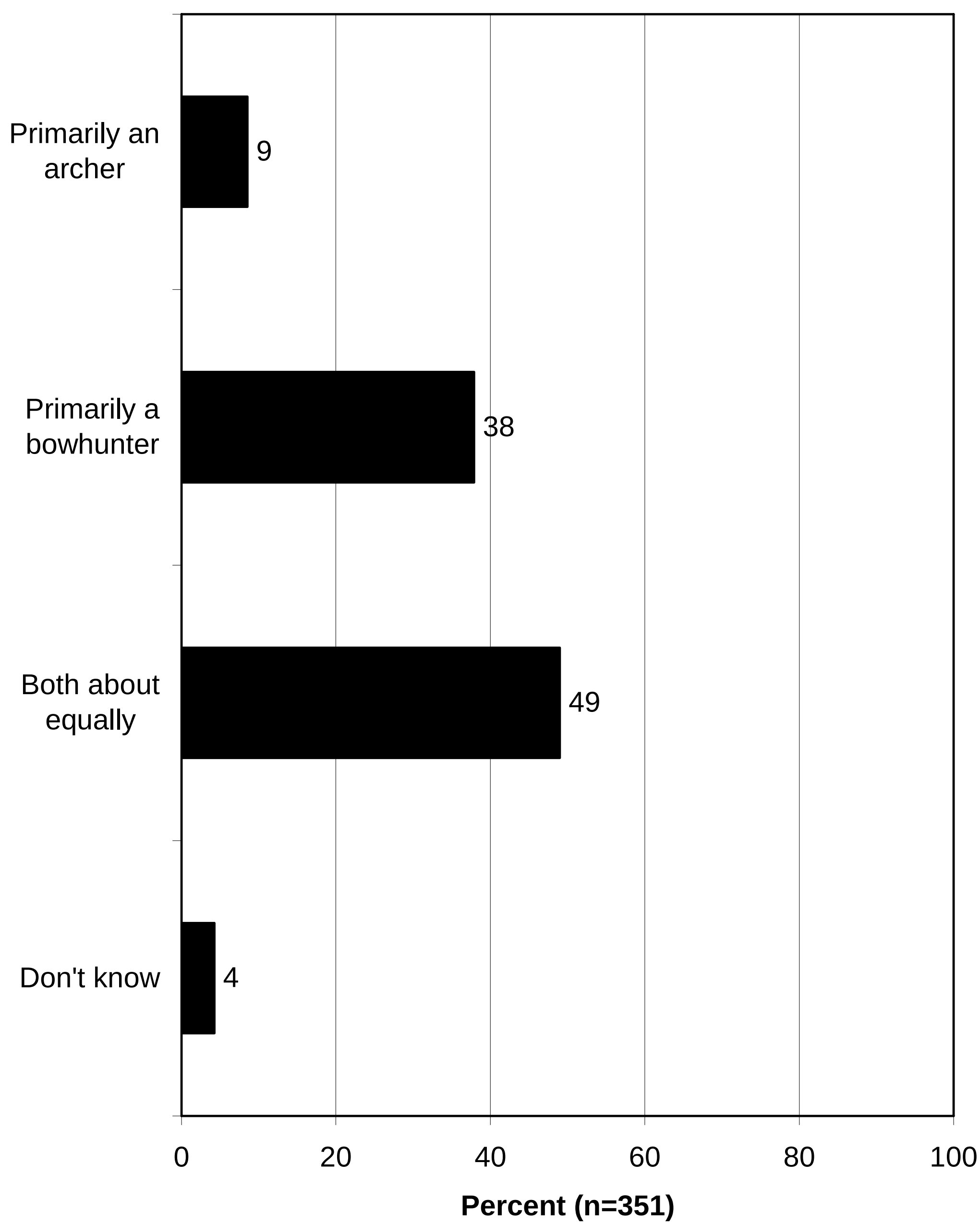
Retailers Survey

Q153. Currently, do you provide health insurance for yourself or are you on insurance provided by another employer? (Asked of those who did not offer health insurance to their employees in 2008; if neither, they could give other answers as shown.)



Retailers Survey

Q178. Do you consider yourself primarily an archer, primarily a bowhunter, or both about equally?



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