Responsive Management

SURVEY OF
ARCHERY TRADE ASSOCIATION MEMBERS

Conducted for the Archery Trade Association

by Responsive Management

2008

SURVEY OF
ARCHERY TRADE ASSOCIATION MEMBERS

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EXECUTIVE SUMMARY

INTRODUCTION AND METHODOLOGY

This study was conducted for the Archery Trade Association (ATA) to determine members' opinions on issues facing archery and bowhunting, on the ATA itself, on issues facing the ATA, and on the ATA Trade Show. The study entailed two telephone surveys: the first of retail members of the ATA, and the second of regular members (i.e., manufacturing distributors) and sales representative members of the ATA.

For the surveys, telephones were selected as the sampling medium. A central polling site at the Responsive Management office allowed for rigorous quality control over the interviews and data collection. The telephone survey questionnaires were developed cooperatively by Responsive Management and the ATA. Responsive Management conducted pre-tests of the questionnaires and made any necessary revisions to them based on the pre-tests. The surveys were conducted in February 2008. Interviews were conducted on Monday through Friday from 9:00 am to approximately 2:00 pm, as well as on Saturdays from noon to 5:00 pm.

The software used for data collection was Questionnaire Programming Language 4.1. Responsive Management obtained a total of 460 completed interviews with retail members, 178 completed interviews with regular members, and 111 interviews with lapsed members from within those both samples. The analysis of data was performed using Statistical Package for the Social Sciences software as well as proprietary software developed by Responsive Management.

ISSUES FACING THE ARCHERY INDUSTRY, BOWHUNTING, AND THE ATA

- When asked to name, in an open-ended question (i.e., no answer set is read, and respondents can name anything that comes to mind), the most important issues facing bowhunting today, retail members most commonly say access to hunting areas, involvement of younger participants, and the affordability of the sport. Regular members most commonly say involvement of younger participants, declining numbers of participants (young and old), and access to hunting areas.
    - When asked to name the most important issues facing archery and the most important issues facing the archery and bowhunting industry, some of the responses are the same as

the issues facing bowhunting: involvement of younger participants, declining participation overall, and cost of equipment, as well as among retail members the competition of big box stores.

- The survey also asked respondents to name the most important issues facing the ATA itself. Retail members most commonly said providing information and education about archery, bowhunting and the ATA; improving the location of the Trade Shows; and recruiting and retaining members. Regular members most commonly said the Trade Show in general; providing information and education about archery, bowhunting and the ATA; increasing attendance at the Trade Shows; and better relations and communications with dealers.

- The survey asked respondents to indicate how concerned the ATA should be about eight issues (seven issues among regular members), using a scale of extremely concerned, very concerned, somewhat concerned, or not at all concerned.
  - Among retail members, the top issues about which they think the ATA should be concerned are the influence of big box stores on the ATA (69% are *extremely* or *very* concerned) and ATA Trade Show participation (62%)—the two top issues among retail members by far. Three more issues are grouped in the middle of the ranking: the influence of larger companies on the ATA (42%), the cost of attending the Trade Show (36%), and the influence of buying groups on the ATA (35%).
  - Among regular members, one issue is far away of more concern than the others: participation in the ATA Trade Show (71% of regular members say the ATA should be *extremely* or *very* concerned). Below that are two issues with nearly half saying the ATA should be *extremely* or *very* concerned: the influence of big box stores on the ATA (47%) and the influence of larger companies on the ATA (46%).

- The survey asked respondents to indicate how concerned they are about 23 industry issues (each group was asked about 21 issues).
  - Among retail members, no issues stand out at the top of the ranking as being of markedly greater concern than the others. In fact, 13 of the 21 issues about which the survey asked have more than 60% of respondents saying that they are *extremely* or *very* concerned. On

the other hand, there are four issues that are markedly lower in concern than the rest: competition for employees from government agencies (17% are *extremely* or *very* concerned), competition for employees from other industries (28%), the crossbow and its use (29%), and compound bows not being allowed in the Olympics (31%).

- The results among regular members are quite similar (with the exception discussed below), particularly in that the lowest-ranked issues are the same as for retail members.

- The survey also asked respondents if there were any problems or concerns that the ATA does not currently address but on which they would like the ATA's assistance. Again, relatively low percentages answered in the affirmative: 8% of retail members and 15% of regular members named a problem/concern not currently addressed by the ATA but for which they would like the ATA's assistance. Problems/concerns commonly named by retail members include questionable business practices of other businesses and the need to support youth involvement in archery and bowhunting. Problems/concerns commonly named by regular members include the need for better promotion of the sport, the Federal excise tax, legal assistance, and the presence of non-members on the show floor of the Trade Show.

- The survey asked if the respondent's company had worked with the ATA to address any problems/concerns: only 2% of retail members had worked directly with the ATA on a problem/concern, while 10% of regular members had done so. Typical problems/concerns included the excise tax on equipment and educational opportunities. In a follow-up question, the majority of retail members (70%) and regular members (53%) whose companies had worked with the ATA on problems/concerns were satisfied with the ATA's assistance. However, dissatisfaction was nearly half among regular members (47% were dissatisfied). Note that the sample sizes for the follow-up satisfaction question were low (10 retail members, 17 regular members).

KNOWLEDGE AND AWARENESS OF THE ATA

- The survey asked respondents about their knowledge level of three items: the ATA itself, the activities of the ATA, and the benefits of the ATA. For all three questions, a majority of both groups say that they know “a great deal” or “a moderate amount” (the top half of the scale), but “a moderate amount” is the most common answer.

- It is worth noting that the majority of responses to the knowledge questions were in the middle of the scale (“a moderate amount” or “a little”) rather than the extremes (“a great deal” or “nothing”).

MOTIVATIONS FOR ATA MEMBERSHIP AND REASONS FOR NOT RENEWING MEMBERSHIP IN THE ATA

➢ Each respondent was asked to name the most important reason their company became a member of the ATA. Retail members most commonly said to be affiliated with the ATA Trade Show (36%) and to help grow the sports of archery and bowhunting/because of common goals (28%). Regular members most commonly said to be affiliated with the ATA Trade Show (41%), to help grow the sports of archery and bowhunting/because of common goals (28%), and for recognition and exposure (20%).

- In a question that also pertains to motivation, each respondent was read a list of potential influences and asked to name the one that had the most influence on their decision to join the ATA. The top influence, by far, among both retail and regular members was the ATA Trade Show.

➢ When asked what they like most about being an ATA member, retail members most commonly said the Trade Show (by far the top answer), information and publications, and the benefits of the ATA and support provided by the ATA. Regular members said the Trade Show, the ability to network through the ATA (and at the show), and information and publications.

➢ When asked what they like the least about being an ATA member, retail members most commonly say that there is nothing they dislike; otherwise, the location of the show and the cost of membership are most commonly named. Regular members also most commonly say that there is nothing they dislike; otherwise, the most common answer is cost.

- The survey asked about 12 potential programs/benefits as incentives for renewing membership (retail members were asked only about 9 of the 12, regular members were asked about 11 of the 12). Specifically, for each program/benefit, the survey asked respondents if it would make them more likely to renew their membership, less likely, or whether it would have no effect on their renewal decisions.
  - Among retail members, six of the nine potential programs/benefits are closely grouped, all with more than 80% saying the potential program/benefit would make them more likely to renew their membership, listed below.
    - Increased efforts to work with state/local authorities to expand bowhunting opportunities (88%).
    - Programs to connect local dealers with school and community archery/bowhunting programs (87%).
    - A program to work with cities and counties to improve recreational archery programs and ranges (87%).
    - Increased efforts to partner with agencies to grow archery and bowhunting (85%).
    - Increased efforts to motivate agencies to spend more federal excise taxes to grow archery and bowhunting (83%).
    - Working with cities to eliminate shooting ordinances and expand shooting opportunities (83%).
  - Among regular members, five of the eleven potential programs/benefits have more than 70% saying the potential program/benefit would make them more likely to renew their membership, listed below.
    - Increased efforts to work with state/local authorities to expand bowhunting opportunities (80%).
    - Increased efforts to partner with agencies to grow archery and bowhunting (79%).
    - Working with cities and counties to improve recreational archery programs and ranges (77%).
    - Increased efforts to motivate state agencies to spend more federal excise tax funds on growing archery and bowhunting (75%).
    - Programs to connect local dealers with school and community archery and bowhunting programs (74%).

- After the series of questions about various programs/benefits that would motivate respondents to renew their memberships, they were asked in an open-ended question if there are any other programs or member benefits that they would like to see the ATA provide its members. Overwhelming majorities of retail, regular, and lapsed members indicate that there are no other programs or benefits that they would like to see the ATA provide; otherwise, various things were said by small percentages, with no one item being mentioned by markedly higher percentages than other items.

- The survey asked respondents in an open-ended question how the ATA could improve the value of membership. Interestingly, 14% of retail members and 7% of regular members said that there was nothing that needed to be improved. Otherwise, retail and regular members most commonly said better/more benefits, more support for members, better communications, and reduced cost.

- Overwhelming majorities indicated being *very* likely (96% of retail and 89% of regular members) to renew their membership this year. When looking at *very* and *somewhat* likely combined, 99% of retail and 98% of regular members indicate being likely to renew their membership.
    - The survey also asked about the likelihood of being a member 5 years hence, and most movement is from *very* likely to *somewhat* likely (rather than to "not likely"): 85% of retail members and 73% of regular members say they will be *very* likely, and 96% and 92%, respectively, say they will be *very* or *somewhat* likely.

- Respondents whose memberships were not current (valid) at the time of the interview—in other words, lapsed members—were asked why they had not renewed their ATA memberships. The most common answers are because they did not attend the Trade Show, they forgot/accidentally let the membership lapse, or that they see no benefit in being a member.

RATINGS OF IMPORTANCE AND PERFORMANCE OF PROGRAMS AND BENEFITS PROVIDED BY THE ATA

- The survey asked respondents about the importance of 16 programs and/or benefits that the ATA provides to members on a scale of 0 to 10, with "0" being not at all important and "10" being extremely important. This analysis looks not only at the actual means and percentages of respondents giving certain answers, but it also looks at the ranking of the programs/benefits—i.e., how each program/benefit is perceived relative to other programs/benefits.
  - Retail members give the highest mean ratings of importance to the ATA's work on broad, national issues rather than to specific, tangible services that the ATA provides.
    - Among the top programs/benefits in importance (all with a mean rating above 9.00) are providing support for efforts to grow archery and bowhunting (mean of 9.35), representing the industry in Congress and among national leaders (9.30), protecting bowhunting by working with state agencies on regulations and management (9.21), and influencing legislation, agency programs, and business issues (9.10). These are all rather broad efforts. The other program/benefit with a mean of more than 9.00 is providing the ATA Trade Show (9.11).
    - Lowest down on the ranking among retail members are specific, tangible programs/benefits: access to the ATA member list (mean of 6.83), providing ATA's Industry Benefits Health Plan (6.84), offering service provider programs like business insurance (7.42), and providing discounts on books and publications (7.43). (A word of caution: a low rating of importance can simply mean that a program/benefit is not a top-of-mind issue—perhaps because there are no problems with it—rather than because it is of no importance; on the other hand, some programs/benefits might be of no actual importance to respondents.)
  - Regular members give similar ratings to those of retail members, particularly at the top, with regular members' highest mean ratings being for those aforementioned broad, national programs/benefits.

- The surveys asked respondents to rate how well the ATA performs these programs/benefits, where "0" is poor and "10" is excellent. The good news is that *all* programs/benefits have mean ratings well above the midpoint—meaning that the ATA's performance is positively perceived.
    - Retail members give high performance ratings to four of the same five programs/benefits that they think are highly important: providing the ATA Trade Show; representing the industry in Congress and among national leaders; providing support for efforts to grow archery and bowhunting; and influencing legislation, agency programs, and business issues. Of those top programs/benefits in importance, only protecting bowhunting by working with state agencies on regulations and management is ranked notably lower in performance than in importance.
        - In addition to the four high-rated programs/benefits just discussed, three other programs/benefits have high performance ratings among retail members: access to industry magazines; member training, seminars, and classes; and the directory listings (archerysearch.com and Black's).
        - Low performance ratings (relatively speaking) are given by retail members to providing the Health Plan, offering service provider programs like business insurance, and providing discounts on books and publications.
    - Among regular members, three of the five most important programs/benefits are highly rated in performance: providing the ATA Trade Show, representing the industry in Congress and among national leaders, and providing support for efforts to grow archery and bowhunting.
        - Also highly rated in performance among regular members are access to the ATA member list, providing the directory listings, and providing access to industry magazines.
        - Low performance ratings (again, relatively speaking) are given by regular members to providing the Health Plan, providing discounts on books and publications, and offering service provider programs like business insurance.

SATISFACTION AND DISSATISFACTION WITH THE ATA AND RATINGS OF ITS PERFORMANCE

- The overwhelming majority of retail (87%) and regular (68%) members are satisfied—mostly *very* satisfied—with the activities of the ATA since its transition from AMO 5 years ago (only 2% of retail members and 10% of regular members are dissatisfied).
  - Those who were satisfied most commonly gave as their reasons for being satisfied the following: that Trade Show experiences have been good, that the ATA supports its members, that the ATA is doing a good job in general, and that the ATA is doing a good job promoting archery.
  - Those who were dissatisfied most commonly said that their dissatisfaction was because the perception that the ATA is not managed well, that it does not properly support members, or that they do not like the way the Trade Show is managed.

- Satisfaction with the benefits provided by the ATA is also high: 71% of retail members and 56% of regular members are satisfied with the benefits provided by the ATA in the past 5 years. Because many respondents give neutral answers, only 2% of retail members and 5% of regular members are dissatisfied.
  - The reasons for satisfaction with the benefits were most commonly general satisfaction with the ATA's actions and its benefits, they like the support they received from the ATA, the Trade Show itself, and specifically the discounts at the Trade Show.
  - Those who were dissatisfied most commonly said that their dissatisfaction was because they feel the benefits are too limited or the cost (note the low sample sizes on this question).

- Ratings of the ATA as an association for the archery and bowhunting industry are highly positive: 90% of retail members and 78% of regular members give a rating of excellent or good; only 1% of retail members and 3% of regular members give a poor rating. In another question, respondents were asked if the ATA is better, the same, or worse than other industry and business associations, again with positive results. The percentages saying better (48% of retail and 30% of regular members) far exceed the percentages saying worse (1% of retail and 7% of regular members).

- Those who rate the performance of the ATA as an association for the archery and bowhunting industry in the lower half of the scale (fair or poor) were asked to give their reasoning for their rating. Retail members most commonly say that they see no benefit and that there is room for improvement. Regular members most commonly blame organizational politics, that they see little benefit, and the Trade Show itself as prompting the low rating.
- The survey also had respondents compare the ATA with itself in its previous incarnation as the Archery Manufacturers and Merchants Organization (AMO) 5 years ago. The percentages saying that the ATA is better than AMO (51% of retail and 42% of regular members) exceed the percentages saying either about the same (19% and 22%, respectively) or worse (1% and 4%, respectively). Note that just under a third did not know enough to say.

➢ The survey asked respondents to indicate agreement or disagreement with 9 statements (each group was asked about 8 of the 9). These statements, while not directly about satisfaction, give an indirect examination of how satisfied members are based on the statements. All of the statements are positive about the ATA and/or its activities; therefore, agreement suggests satisfaction, and disagreement suggests dissatisfaction.

- Among retail members, agreement is high for all statements (at 80% or more), indicating high satisfaction. At the top of the ranking are five grouped together (all with 87% or more who agree), listed below.
    - "The ATA effectively represents the archery and bowhunting industry." (95%)
    - "The ATA effectively serves the interests of its members." (94%)
    - "The ATA effectively influences the archery and bowhunting industry." (90%)
    - "The ATA offers service provider benefits that are valuable." (89%)
    - "The ATA staff leadership effectively represents the archery and bowhunting industry." (87%)

- Among regular members, agreement is high for most statements (at 80% or more for 5 of the 8 statements), indicating high satisfaction for the most part. One is by itself at the top of the ranking (agreement at 88%), followed by four, all with agreement at 81% or 82%:
  - "The ATA effectively represents the archery and bowhunting industry." (88%)
  - "The ATA staff leadership effectively represents the archery and bowhunting industry." (82%)
  - "The ATA effectively influences the archery and bowhunting industry." (82%)
  - "The ATA effectively serves the interests of its members." (81%)
  - "The ATA offers service provider benefits that are valuable." (81%)

➢ Another question asked respondents to indicate whether they agree or disagree that the ATA can improve the value of membership in its association. Agreement would suggest that the ATA could do more, although agreement does not necessarily equate with dissatisfaction. Nonetheless, the fact that agreement was so high on this question (92% of retail members and 94% of regular members) suggests that members are not wholly satisfied with their membership—or at the very least feel that there is room for improvement.

MISCELLANEOUS: ATA STRUCTURE, PROCEDURES, AND RULES

➢ Retail members were informed that the ATA Dealer Council currently has three voting seats on the ATA Board of Directors, then they were asked about how many voting seats the Dealer Council should have to effectively represent the dealers on the ATA Board of Directors. Most commonly, retail members think three seats are enough (37% say that three is the right number); a substantial percentage want five seats (23%) or six seats (11%). Note that half want more than three seats (50% say that three seats is too few).

➢ Respondents were asked who (i.e., the position within the company) they thought should represent companies elected to the ATA Board of Directors. Retail and regular members most commonly named the CEO, president, or owner of the company; "anyone" in the company; a marketing, sales, or production director, or the CFO or COO or other top management official.

- Regular members were informed that ATA membership dues are currently based on booth space purchased at the ATA Trade Show, then they were asked whether they agree or disagree that ATA membership dues should continue to be based on the booth space purchased at the Show. While a majority of regular members agree (54%), more than a third (36%) disagree.
  - Those who agreed most commonly did so because they perceive it as being an equitable and fair way to do it.
  - Those who disagreed most commonly did so because they say it is too expensive or that dues should be the same for all.

ATA DUES

- Overwhelming majorities of respondents (88% of retail members, 72% of regular members) say that current ATA membership dues are about the right amount; only 7% of retail and 17% of regular members say that the dues are too high.
  - There are three important reasons that members think dues are too high: that small companies cannot afford them, that the costs outweigh the benefits, or that other memberships are cheaper.

THE ATA TRADE SHOW

- The survey asked respondents to rate the benefits for their company of attending the ATA Trade Show, with highly positive results. Large majorities (89% of retail members and 74% of regular members) rate the benefits as excellent or good; only 1% of retail and 5% of regular members give a rating of poor.
  - Those who rated the benefits in the lower half of the scale (fair or poor) were asked for their reasons for giving their rating. Retail and regular members most commonly said that they receive little return for their efforts at the Show or the lack of good deals at the Show.

- Retail members indicated that their most important reasons for attending the show are to view archery and bowhunting products, to make business transactions, to make contacts, and for seminars and information. Regular members said their most important reasons for attending the show are to make business contacts, to advertise, for the company's image, and to make business transactions.

- Respondents were also asked what aspects of the show they would like to see improved. For both groups, the most common answer is nothing needs to be improved; otherwise, retail members most commonly say better seminars/more in-depth programs and/or a different location, and regular members most commonly say better attendance and/or reduced costs.

- Overwhelming majorities say that it is *very* likely that their company will attend the 2009 ATA Trade Show in Indianapolis (84% of retail and 88% of regular members). Only 7% of retail and 3% of regular members say it is not at all likely that their company will attend the 2009 Show.
    - Those who did not indicate likelihood to attend were asked why they did not plan to attend. The location (including too far to travel) and cost are the two most commonly named reasons. Note that there were very low numbers who did not plan to attend and who answered this follow-up question.

SOURCES OF INFORMATION ABOUT ARCHERY AND BOWHUNTING

- The survey asked respondents where they get their information about archery and bowhunting issues. The most common sources named by retail members are *Inside Archery* magazine, *ArrowTrade* magazine, *Archery Business* magazine, other magazines, and the Internet. These are the same most common sources among regular members, along with word-of-mouth.

- The survey asked respondents where they get their information about the ATA. The most common sources named by retail members are the ATA column in *Inside Archery,* the ATA column in *ArrowTrade,* the ATA column in *Archery Business,* ATA mailings, the ATA online newsletter, and the ATA website. Among regular members, the most common sources are ATA mailings, the ATA online newsletter, the ATA website, the ATA column in *Inside Archery,* the ATA column in *ArrowTrade,* and the ATA column in *Archery Business*.

- When asked to name the preferred way for the ATA to provide them with information about the ATA, retail and regular members most commonly say direct e-mails, direct mail, the ATA online newsletter, *Inside Archery*, *Archery Business*, and *ArrowTrade*.

TABLE OF CONTENTS

INTRODUCTION AND METHODOLOGY

This study was conducted for the Archery Trade Association (ATA) to determine members' opinions on issues facing archery and bowhunting, on the ATA itself, on issues facing the ATA, and on the ATA Trade Show. The study entailed two telephone surveys: the first of retail members of the ATA, and the second of regular members (i.e., manufacturing distributors) and sales representative members of the ATA. Specific aspects of the research methodology are discussed below.

For the surveys, telephones were selected as the sampling medium. 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, 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 the ATA. Responsive Management conducted pre-tests of the questionnaires and made any necessary revisions to them based on the pre-tests.

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 this survey. 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 instrument. 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 surveys were obtained by the interviewers, the Survey Center Managers and/or statisticians checked each survey to ensure clarity and completeness.

The samples were obtained from the ATA and contained names, company names, and telephone numbers. The interviewers attempted to talk to the person named on the call sheet; however, if the person named was too busy and one of his/her employees could answer for the person named, we allowed the proxy to answer the survey. This would happen, for instance, in a large company whose CEO (or other top officials) was unavailable. If the person on the call sheet was lower down in the company, such as a point of contact for the Trade Show, the interviewers attempted to obtain the name and number of a person higher up in the company (preferably the CEO) to be interviewed.

The surveys were conducted in February 2008. Interviews were conducted on Monday through Friday from 9:00 am to approximately 2:00 pm, as well as on Saturdays from noon to 5:00 pm. Responsive Management obtained a total of 460 completed interviews with retail members, 178 completed interviews with regular members, and 111 interviews with lapsed members from within those both samples.

The software used for data collection was Questionnaire Programming Language 4.1 (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. A single computerized survey instrument was used for both questionnaires, with appropriate skip-out and flow patterns depending on which sample was being interviewed. The instrument was programmed so that QPL branched 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.

Because the total population of the various groups (retail members, regular members, lapsed members) could not be determined, and because the sample did not contain all members interviewed, the sampling errors and confidence intervals could not be calculated.

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 support” and “moderately support” are summed to determine the total percentage in support).

A note about the layout of the report: some graphs pertain to more than one section, so these graphs are discussed in more than one section of the report. In those instances, the graph is only shown in one section, with a call-out in the other section indicating where the graph is located.

On questions that were asked of both retail members and regular members, the text of the report will generally discuss the findings among retail members first, then discuss the findings among regular members.

ISSUES FACING THE ARCHERY INDUSTRY, BOWHUNTING, AND THE ATA

- When asked to name, in an open-ended question (i.e., no answer set is read, and respondents can name anything that comes to mind), the most important issues facing bowhunting today, retail members most commonly say access to hunting areas, involvement of younger participants, and the affordability of the sport. Regular members most commonly say involvement of younger participants, declining numbers of participants (young and old), and access to hunting areas.
  - When asked to name the most important issues facing archery and the most important issues facing the archery and bowhunting industry, some of the responses are the same as the issues facing bowhunting: involvement of younger participants, declining participation overall, and cost of equipment, as well as among retail members the competition of big box stores.

- The survey also asked respondents to name the most important issues facing the ATA itself. Retail members most commonly said providing information and education about archery, bowhunting and the ATA; improving the location of the Trade Shows; and recruiting and retaining members. Regular members most commonly said the Trade Show in general; providing information and education about archery, bowhunting and the ATA; increasing attendance at the Trade Shows; and better relations and communications with dealers.

- The survey asked respondents to indicate how concerned the ATA should be about eight issues (seven issues among regular members), using a scale of extremely concerned, very concerned, somewhat concerned, or not at all concerned.
  - Among retail members, the top issues about which they think the ATA should be concerned are the influence of big box stores on the ATA (69% are *extremely* or *very* concerned) and ATA Trade Show participation (62%)—the two top issues among retail members by far. Three more issues are grouped in the middle of the ranking: the

influence of larger companies on the ATA (42%), the cost of attending the Trade Show (36%), and the influence of buying groups on the ATA (35%).

    - Three are at the bottom of the ranking with low percentages perceiving them to be important issues: competition from the Ellett Brothers Show (19%), competition from Kinsey's and Pape's Shows (19%), and the cost of ATA dues (18%).

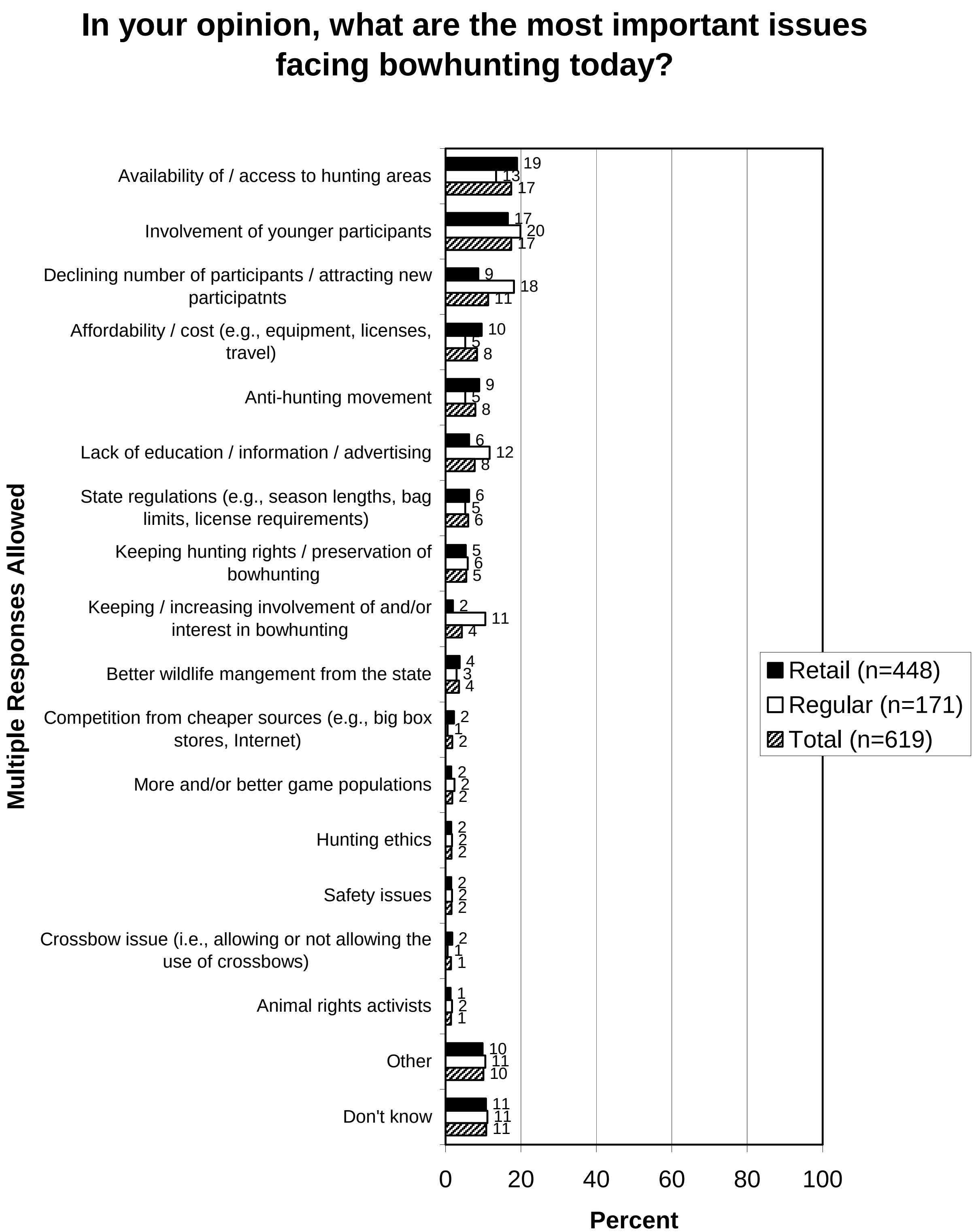
- Among regular members, one issue is far away of more concern than the others: participation in the ATA Trade Show (71% of regular members say the ATA should be *extremely* or *very* concerned). Below that are two issues with nearly half saying the ATA should be *extremely* or *very* concerned: the influence of big box stores on the ATA (47%) and the influence of larger companies on the ATA (46%).
    - Two are at the bottom of the ranking with low percentages perceiving them to be important issues: competition from the Ellett Brothers Show (23%) and competition from Kinsey's and Pape's Shows (27%).

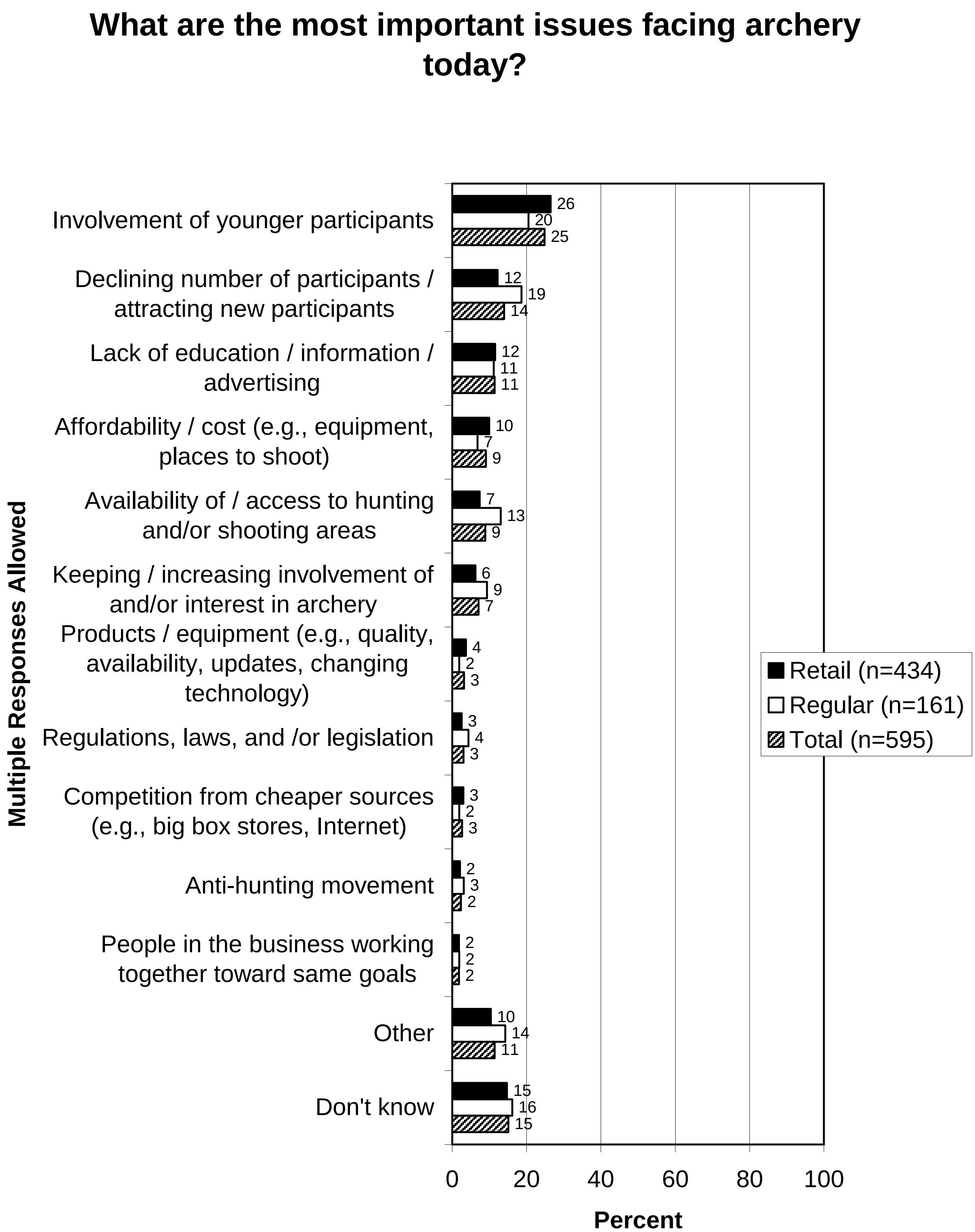
➢ The survey asked respondents to indicate how concerned they are about 23 industry issues (each group was asked about 21 issues).

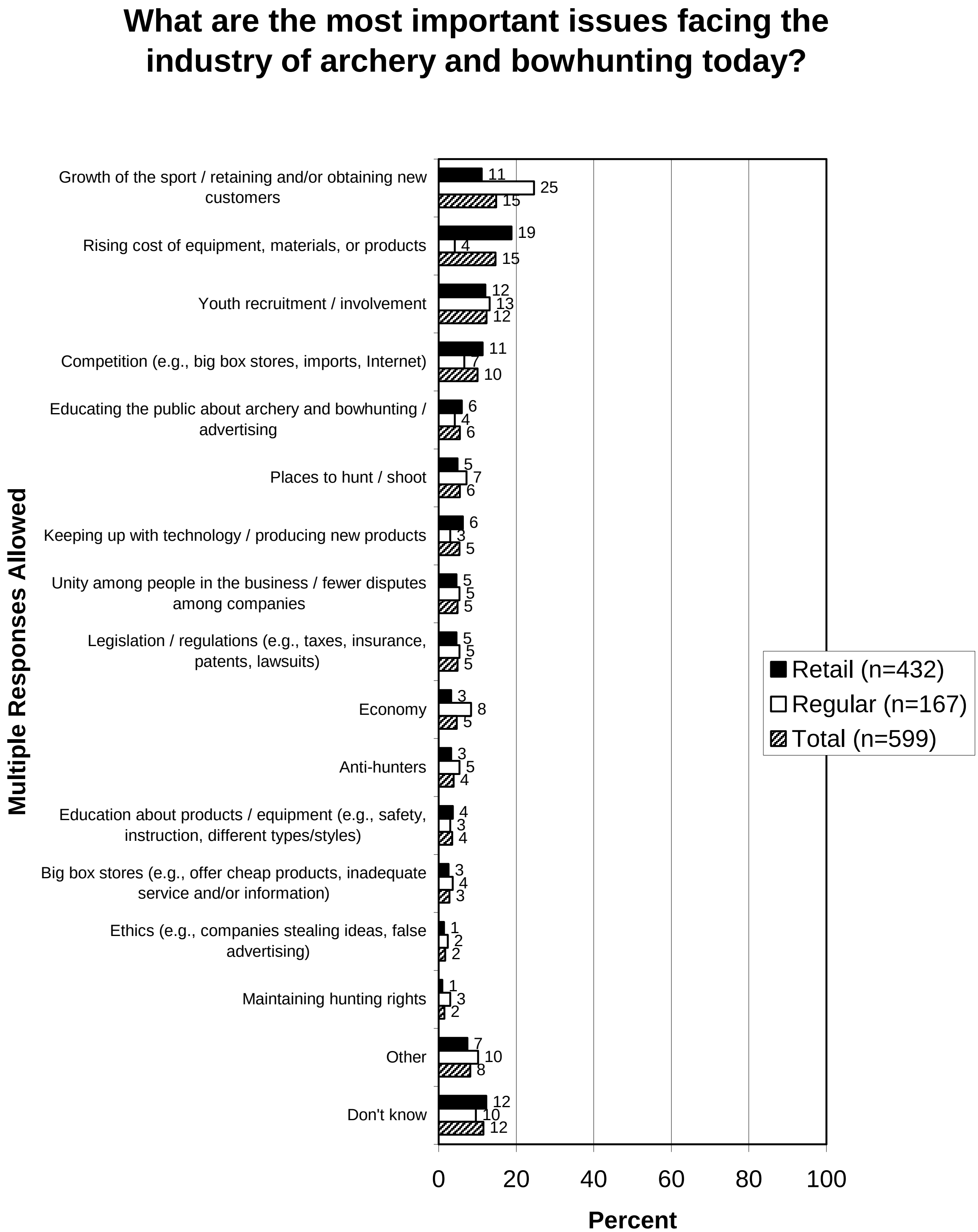
- Among retail members, no issues stand out at the top of the ranking as being of markedly greater concern than the others. In fact, 13 of the 21 issues about which the survey asked have more than 60% of respondents saying that they are *extremely* or *very* concerned. On the other hand, there are four issues that are markedly lower in concern than the rest: competition for employees from government agencies (17% are *extremely* or *very* concerned), competition for employees from other industries (28%), the crossbow and its use (29%), and compound bows not being allowed in the Olympics (31%).
- The results among regular members are quite similar (with the exception discussed below), particularly in that the lowest-ranked issues are the same as for retail members.
- Note that one issue was of much more importance to retail members than to regular members: 70% of retail members are *extremely* or *very* concerned about the role of the Internet in product distribution and marketing, while only 45% of regular members show such concern for that.

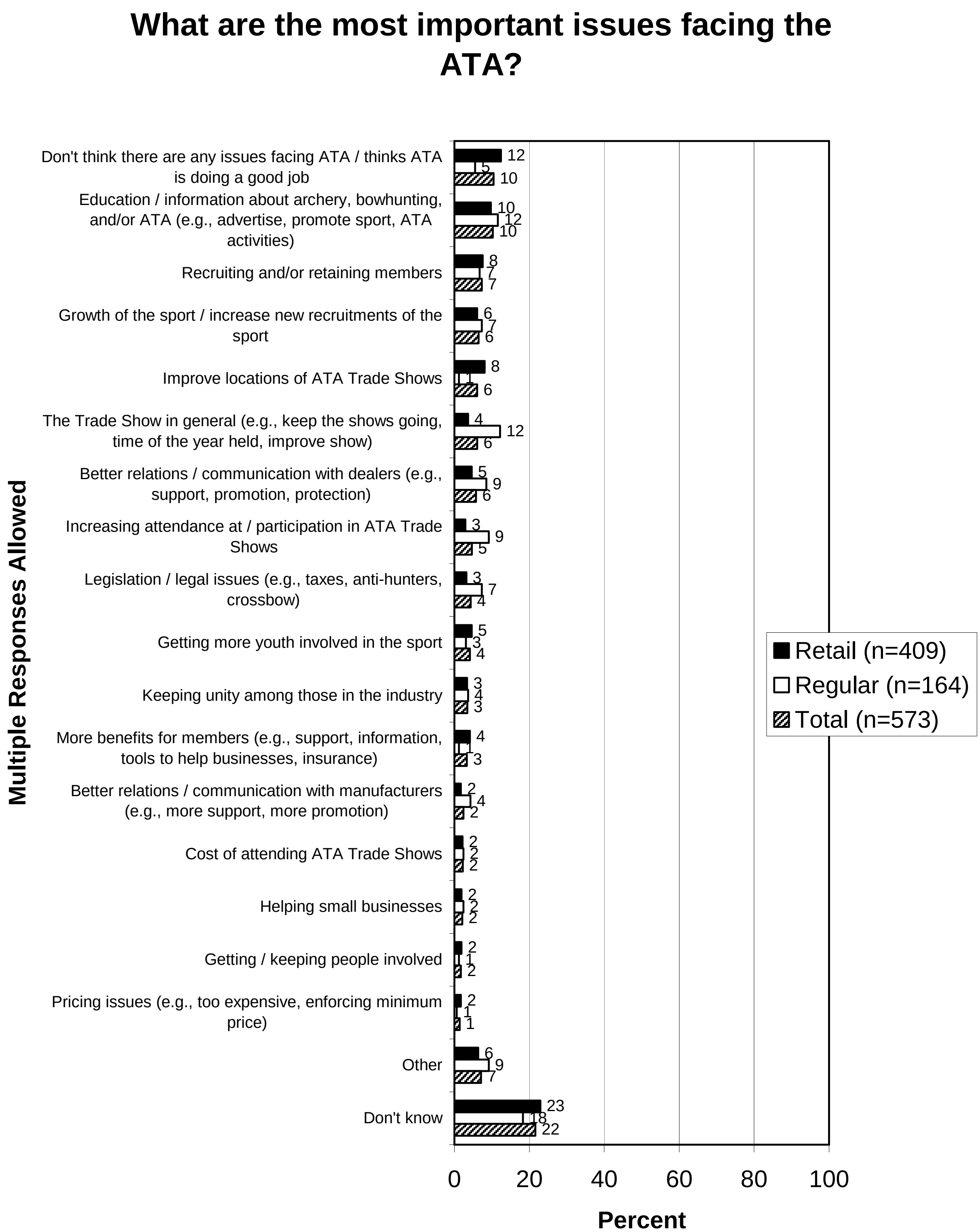
- The survey also asked respondents if there were any problems or concerns that the ATA does not currently address but on which they would like the ATA's assistance. Again, relatively low percentages answered in the affirmative: 8% of retail members and 15% of regular members named a problem/concern not currently addressed by the ATA but for which they would like the ATA's assistance. Problems/concerns commonly named by retail members include questionable business practices of other businesses and the need to support youth involvement in archery and bowhunting. Problems/concerns commonly named by regular members include the need for better promotion of the sport, the Federal excise tax, legal assistance, and the presence of non-members on the show floor of the Trade Show.

- The survey asked if the respondent's company had worked with the ATA to address any problems/concerns: only 2% of retail members had worked directly with the ATA on a problem/concern, while 10% of regular members had done so. Typical problems/concerns included the excise tax on equipment and educational opportunities. In a follow-up question, the majority of retail members (70%) and regular members (53%) whose companies had worked with the ATA on problems/concerns were satisfied with the ATA's assistance. However, dissatisfaction was nearly half among regular members (47% were dissatisfied). Note that the sample sizes for the follow-up satisfaction question were low (10 retail members, 17 regular members).

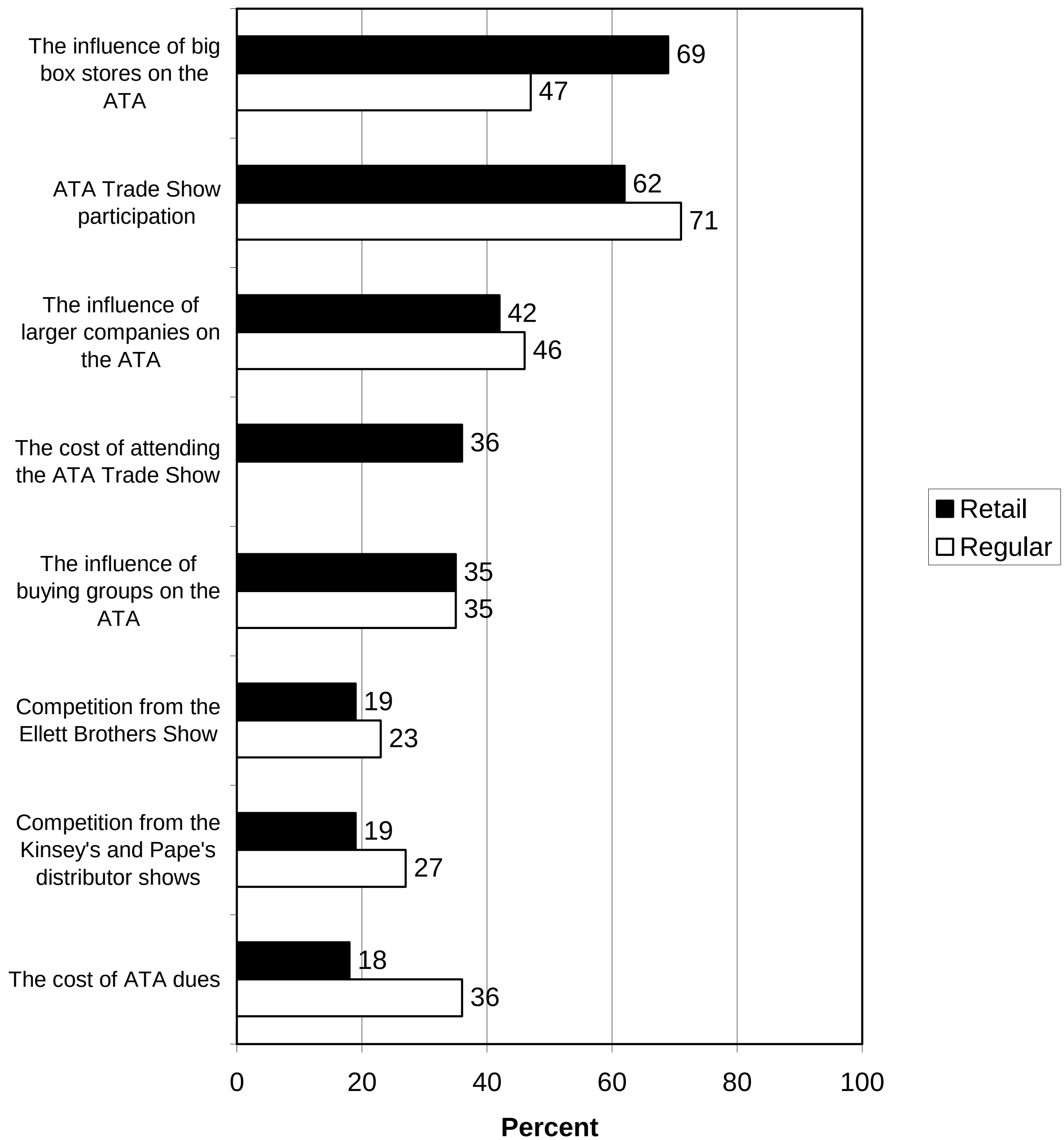

In your opinion, what are the most important issues facing bowhunting today?
Availability of / access to hunting areas 19 13 17
Involvement of younger participants 17 20 17
Declining number of participants / attracting new participatnts 9 18 11
Affordability / cost (e.g., equipment, licenses, travel) 10 5 8
Anti-hunting movement 9 5 8
Lack of education / information / advertising 6 12 8
State regulations (e.g., season lengths, bag limits, license requirements) 6 5 6
Keeping hunting rights / preservation of bowhunting 5 6 5
Keeping / increasing involvement of and/or interest in bowhunting 2 11 4
Better wildlife mangement from the state 4 3 4
Competition from cheaper sources (e.g., big box stores, Internet) 2 1 2
More and/or better game populations 2 2 2
Hunting ethics 2 2 2
Safety issues 2 2 2
Crossbow issue (i.e., allowing or not allowing the use of crossbows) 2 1 1
Animal rights activists 1 2 1
Other 10 11 10
Don't know 11 11 11
Multiple Responses Allowed
Retail (n=448)
Regular (n=171)
Total (n=619)
0 20 40 60 80 100
Percent


What are the most important issues facing archery today?
Multiple Responses Allowed
Involvement of younger participants
26
20
25
Declining number of participants / attracting new participants
12
19
14
Lack of education / information / advertising
12
11
11
Affordability / cost (e.g., equipment, places to shoot)
10
7
9
Availability of / access to hunting and/or shooting areas
7
13
9
Keeping / increasing involvement of and/or interest in archery
6
9
7
Products / equipment (e.g., quality, availability, updates, changing technology)
4
2
3
Regulations, laws, and /or legislation
3
4
3
Competition from cheaper sources (e.g., big box stores, Internet)
3
2
3
Anti-hunting movement
2
3
2
People in the business working together toward same goals
2
2
2
Other
10
14
11
Don't know
15
16
15
0
20
40
60
80
100
Percent
Retail (n=434)
Regular (n=161)
Total (n=595)

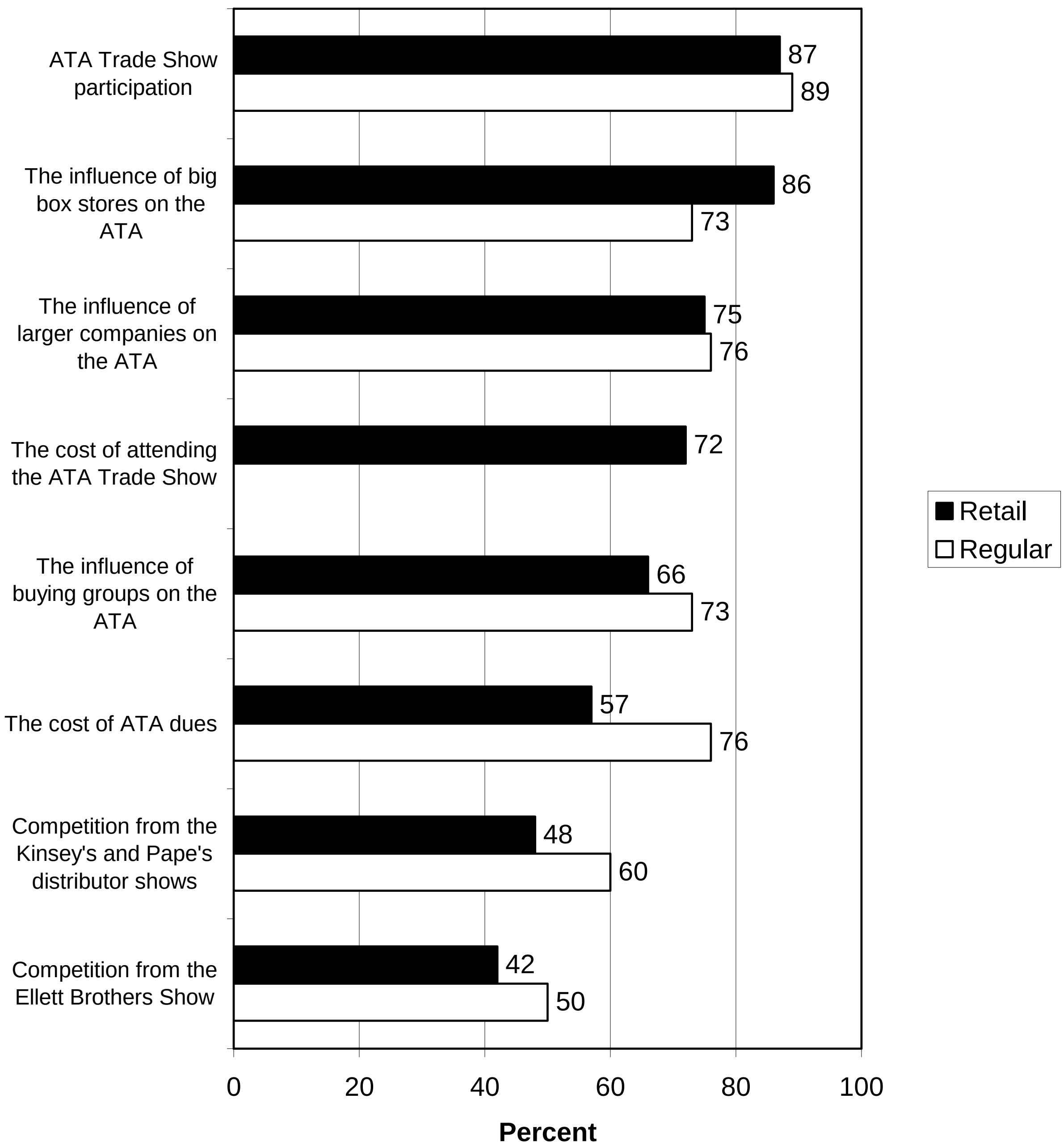

What are the most important issues facing the industry of archery and bowhunting today?
Multiple Responses Allowed
Growth of the sport / retaining and/or obtaining new customers
11
25
15
Rising cost of equipment, materials, or products
19
4
15
Youth recruitment / involvement
12
13
12
Competition (e.g., big box stores, imports, Internet)
11
7
10
Educating the public about archery and bowhunting / advertising
6
4
6
Places to hunt / shoot
5
7
6
Keeping up with technology / producing new products
6
3
5
Unity among people in the business / fewer disputes among companies
5
5
5
Legislation / regulations (e.g., taxes, insurance, patents, lawsuits)
5
5
5
Economy
3
8
5
Anti-hunters
3
5
4
Education about products / equipment (e.g., safety, instruction, different types/styles)
4
3
4
Big box stores (e.g., offer cheap products, inadequate service and/or information)
3
4
3
Ethics (e.g., companies stealing ideas, false advertising)
1
2
2
Maintaining hunting rights
1
3
2
Other
7
10
8
Don't know
12
10
12
0
20
40
60
80
100
Percent
Retail (n=432)
Regular (n=167)
Total (n=599)


What are the most important issues facing the ATA?
Multiple Responses Allowed
Don't think there are any issues facing ATA / thinks ATA is doing a good job
12
5
10
Education / information about archery, bowhunting, and/or ATA (e.g., advertise, promote sport, ATA activities)
10
12
10
Recruiting and/or retaining members
8
7
7
Growth of the sport / increase new recruitments of the sport
6
7
6
Improve locations of ATA Trade Shows
8
1
6
The Trade Show in general (e.g., keep the shows going, time of the year held, improve show)
4
12
6
Better relations / communication with dealers (e.g., support, promotion, protection)
5
9
6
Increasing attendance at / participation in ATA Trade Shows
3
9
5
Legislation / legal issues (e.g., taxes, anti-hunters, crossbow)
3
7
4
Getting more youth involved in the sport
5
3
4
Keeping unity among those in the industry
3
4
3
More benefits for members (e.g., support, information, tools to help businesses, insurance)
4
3
3
Better relations / communication with manufacturers (e.g., more support, more promotion)
2
4
2
Cost of attending ATA Trade Shows
2
2
2
Helping small businesses
2
2
2
Getting / keeping people involved
2
1
2
Pricing issues (e.g., too expensive, enforcing minimum price)
2
1
1
Other
6
9
7
Don't know
23
18
22
0
20
40
60
80
100
Percent
Retail (n=409)
Regular (n=164)
Total (n=573)

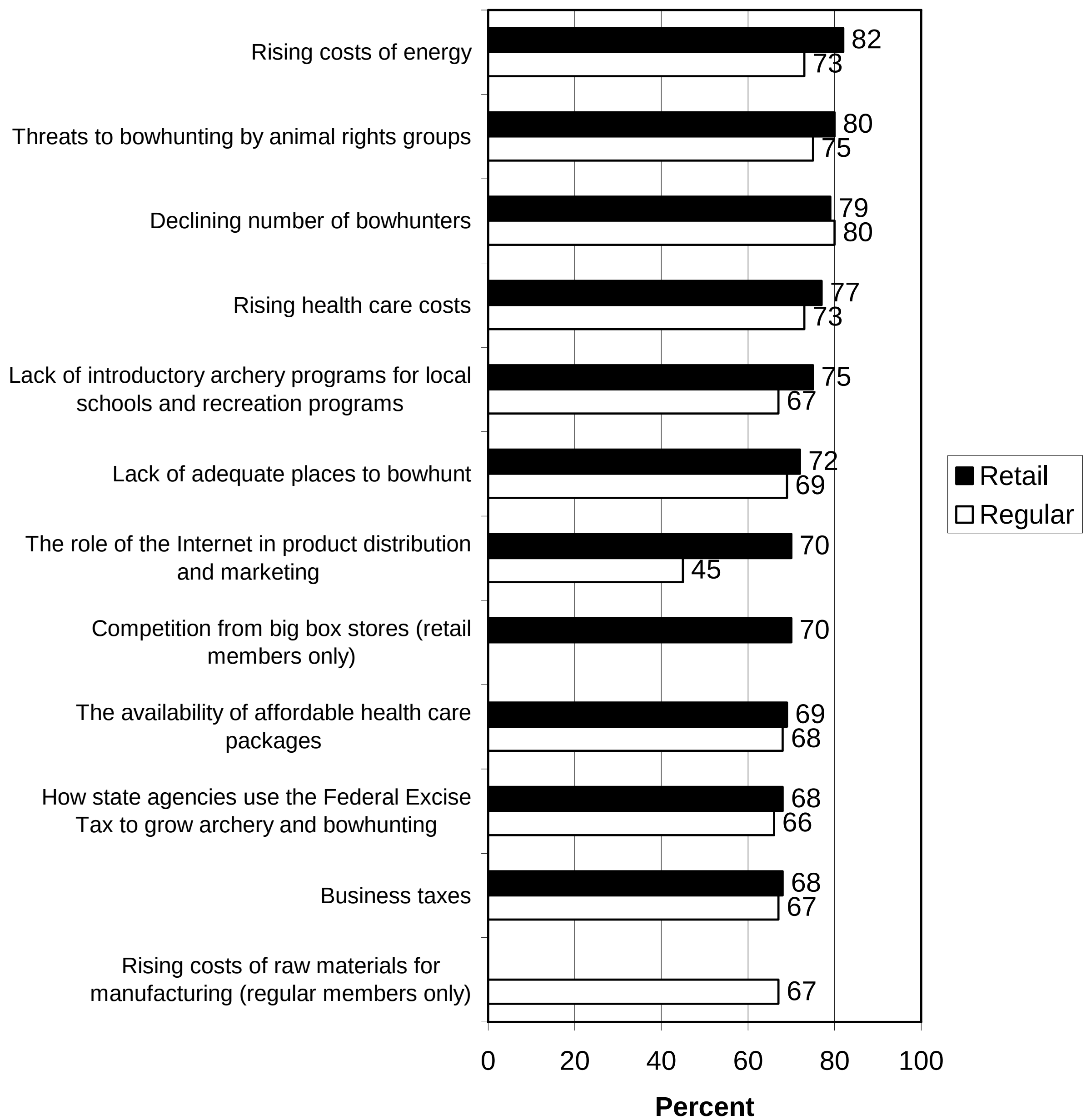
Percent of current ATA members who think the ATA should be extremely or very concerned about the following issues.



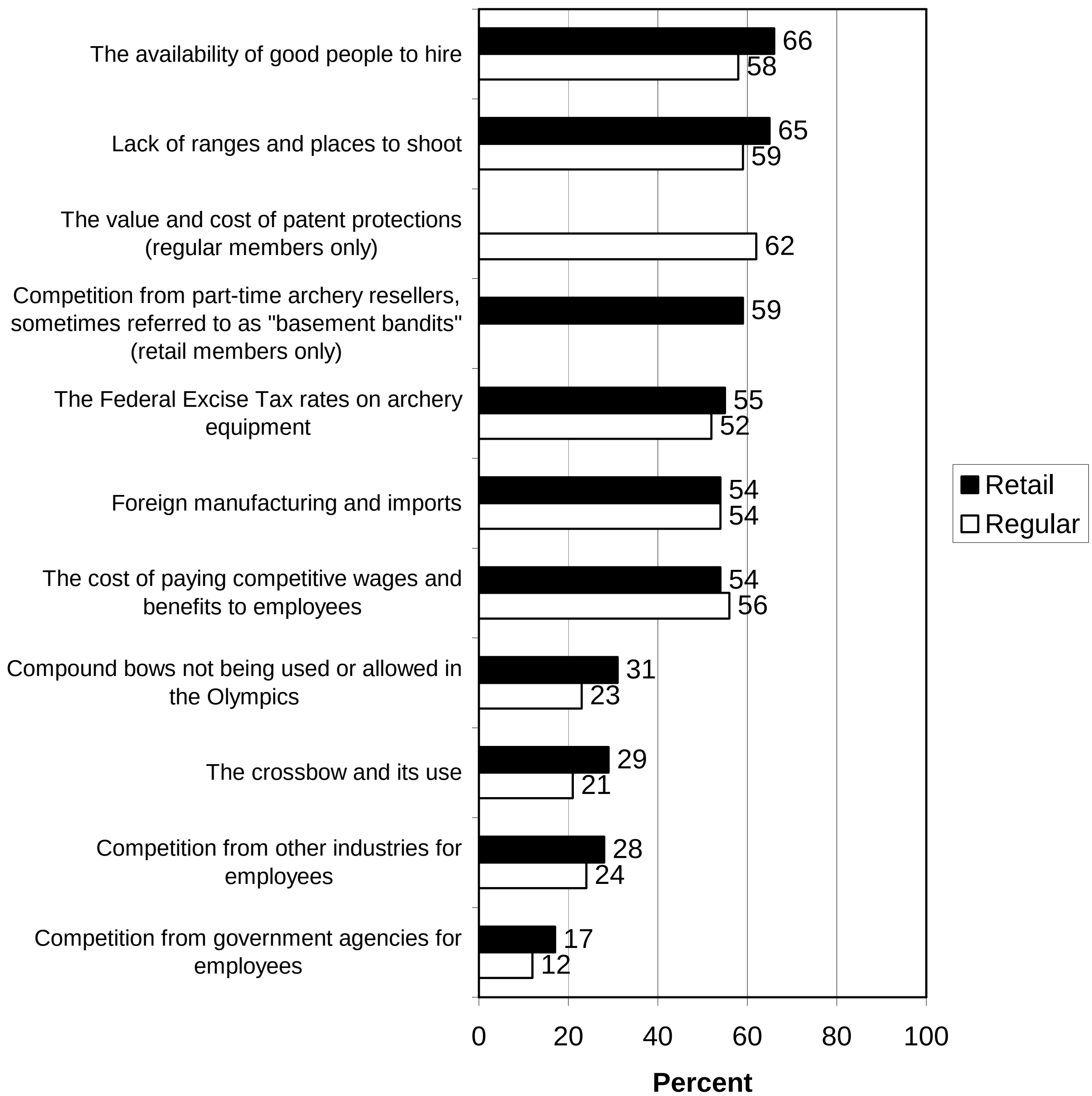
Percent of current ATA members who think the ATA should be concerned about the following issues (extremely, very, or somewhat concerned).



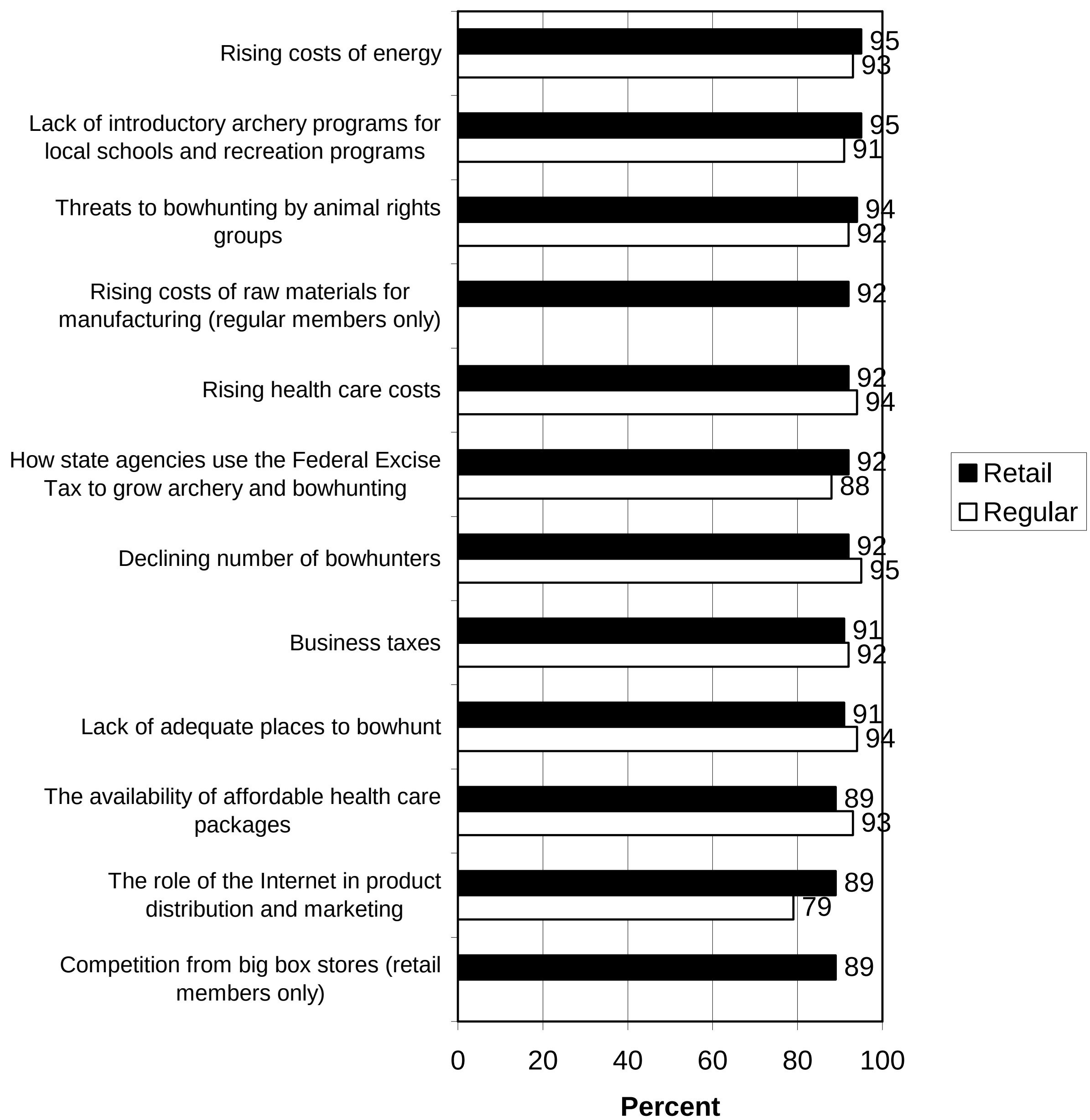
Percent of current ATA members who are extremely or very concerned personally about the following industry issues. (Part 1)



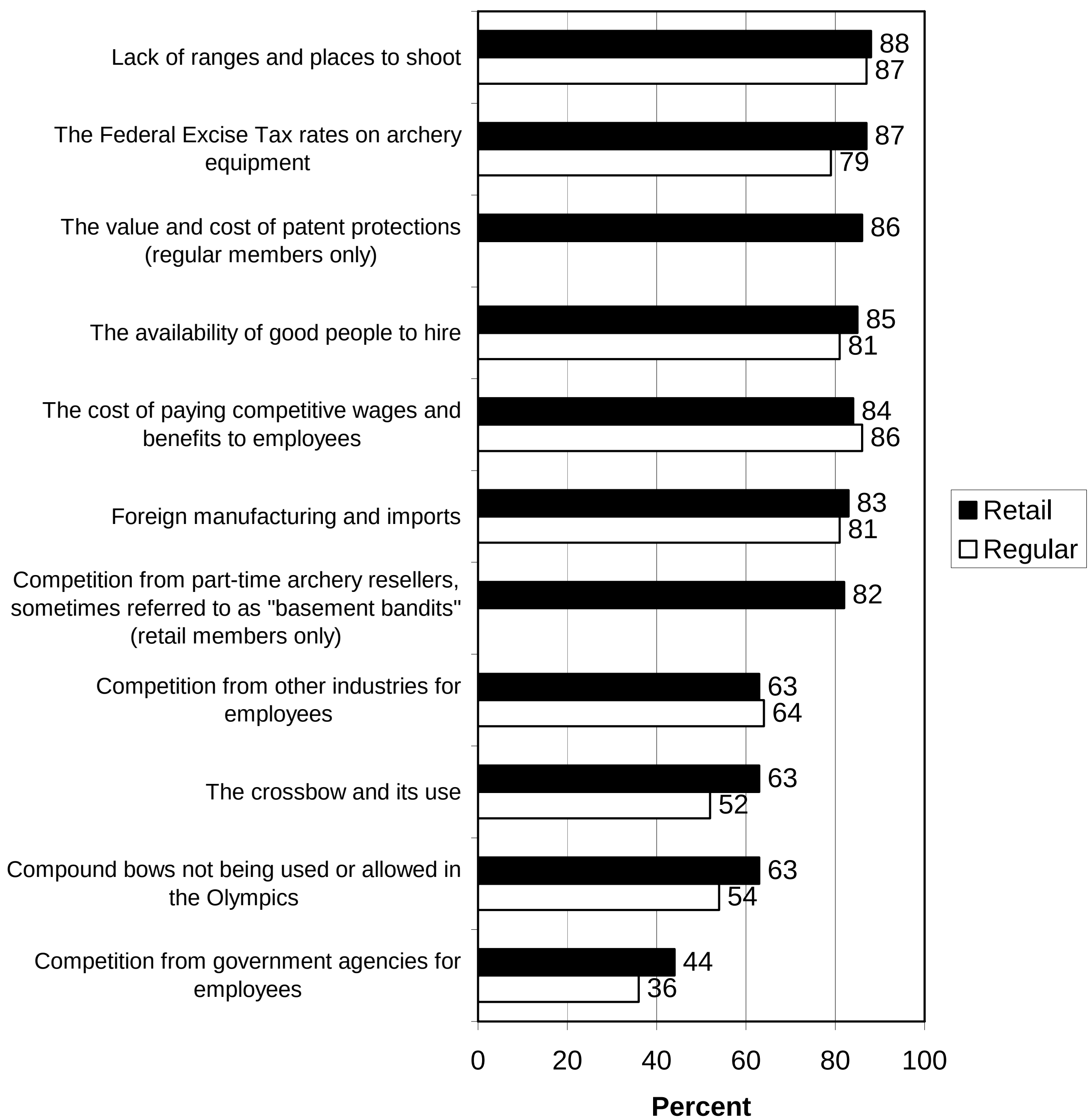
Percent of current ATA members who are extremely or very concerned personally about the following industry issues. (Part 2)



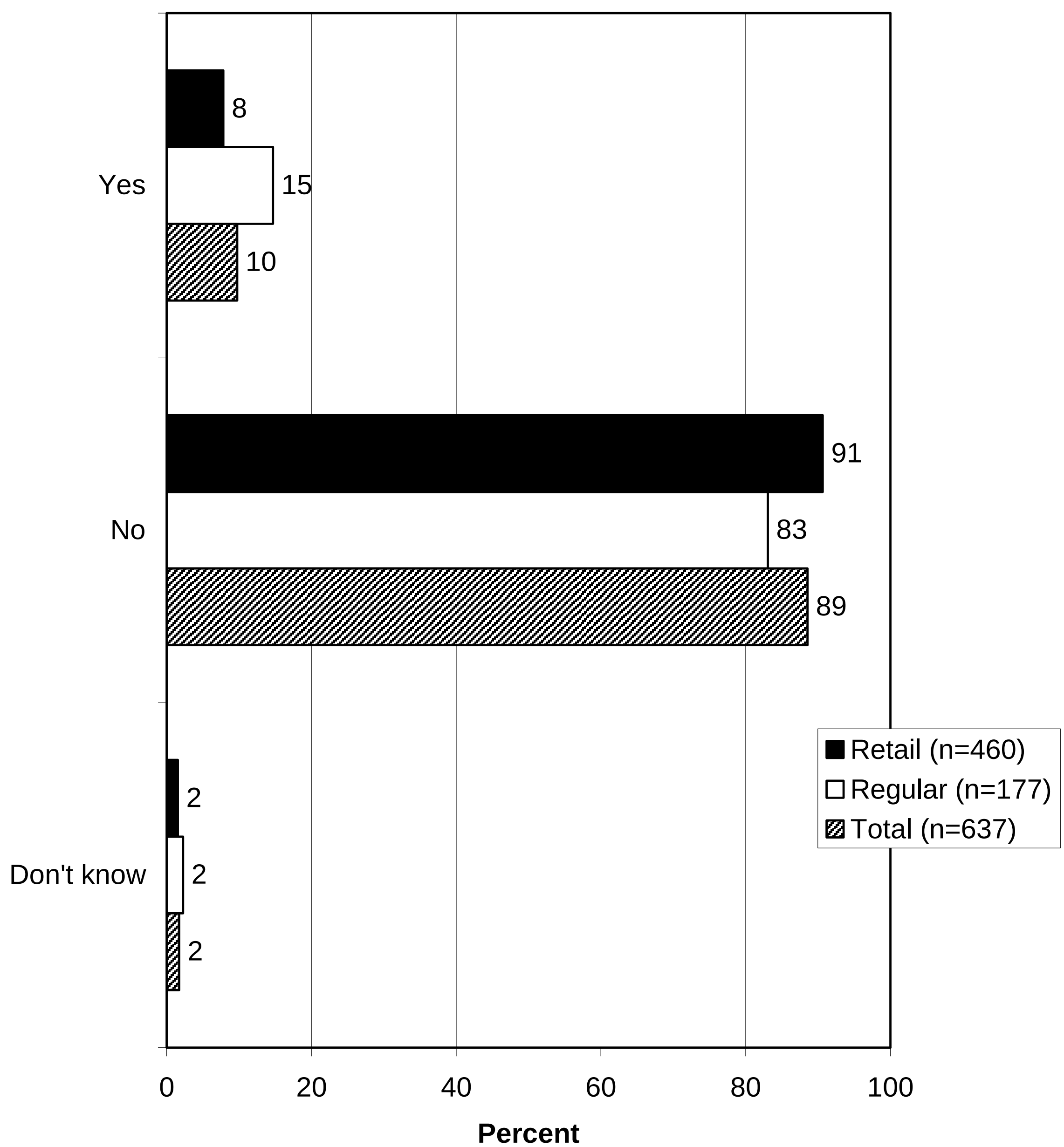
Percent of current ATA members who are concerned personally about the following industry issues (extremely, very, or somewhat concerned). (Part 1)



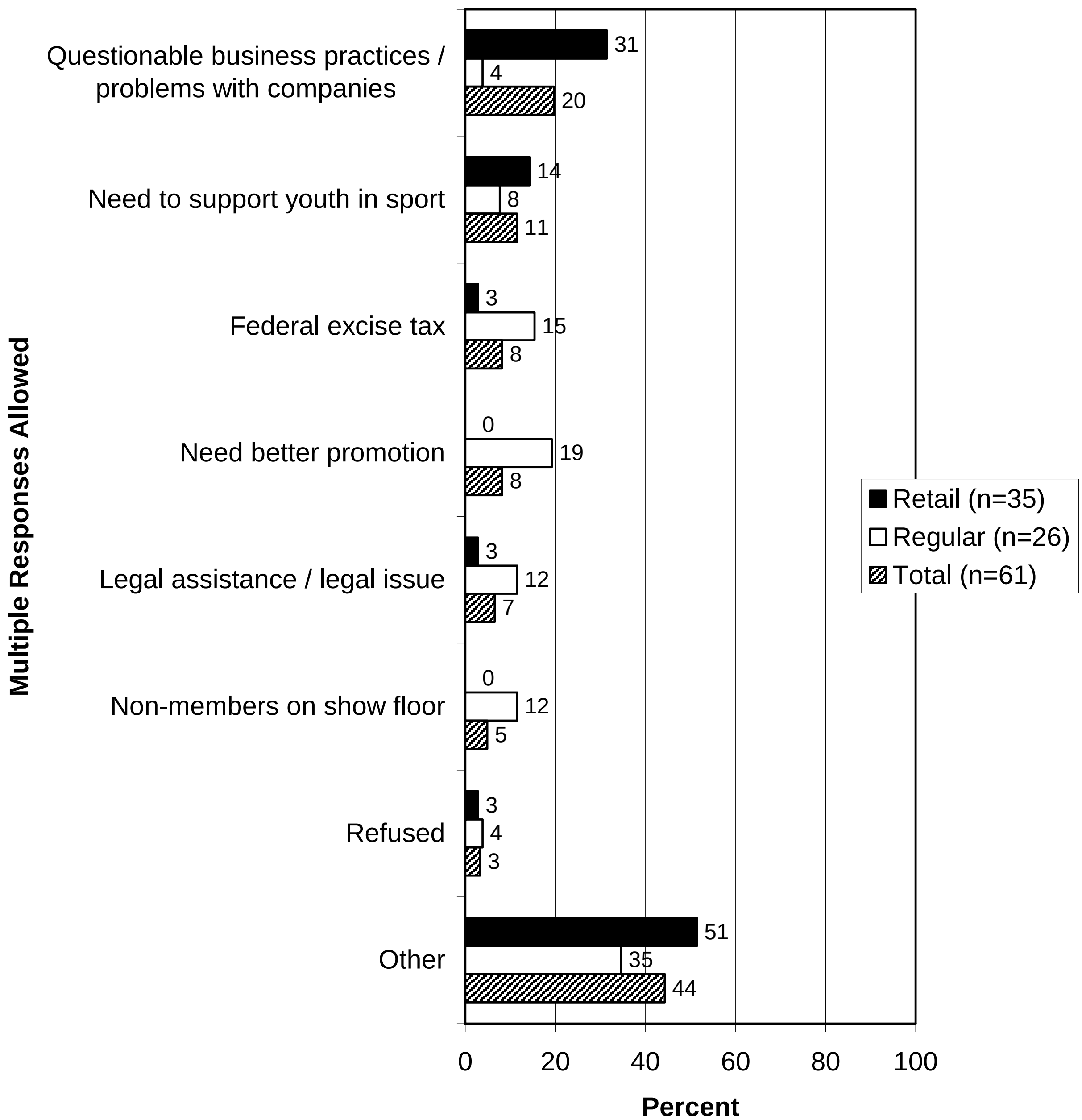
Percent of current ATA members who are concerned personally about the following industry issues (extremely, very, or somewhat concerned). (Part 2)



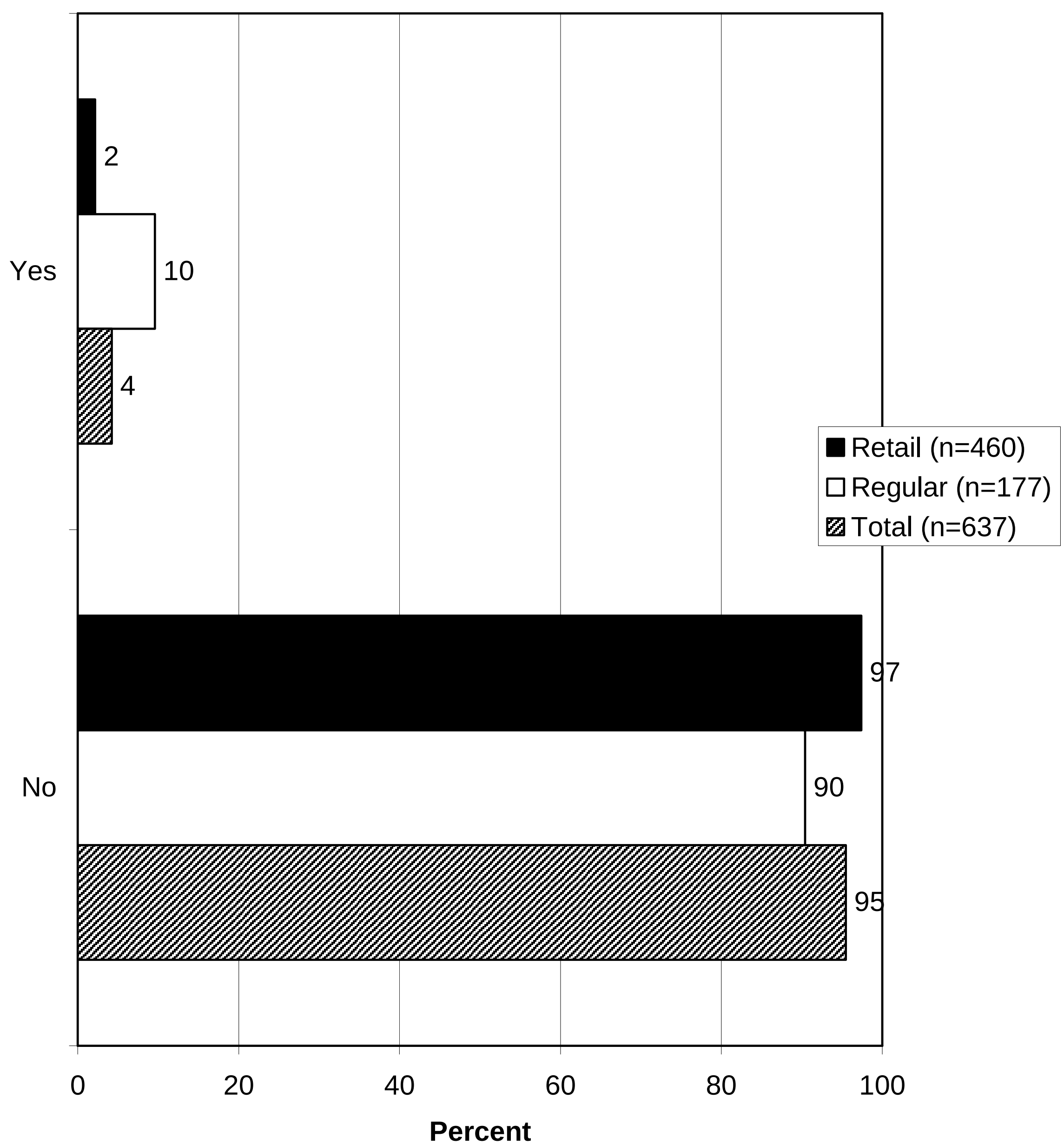
Has your company had any problems or concerns that the ATA does not address but with which you would have liked the ATA's assistance?



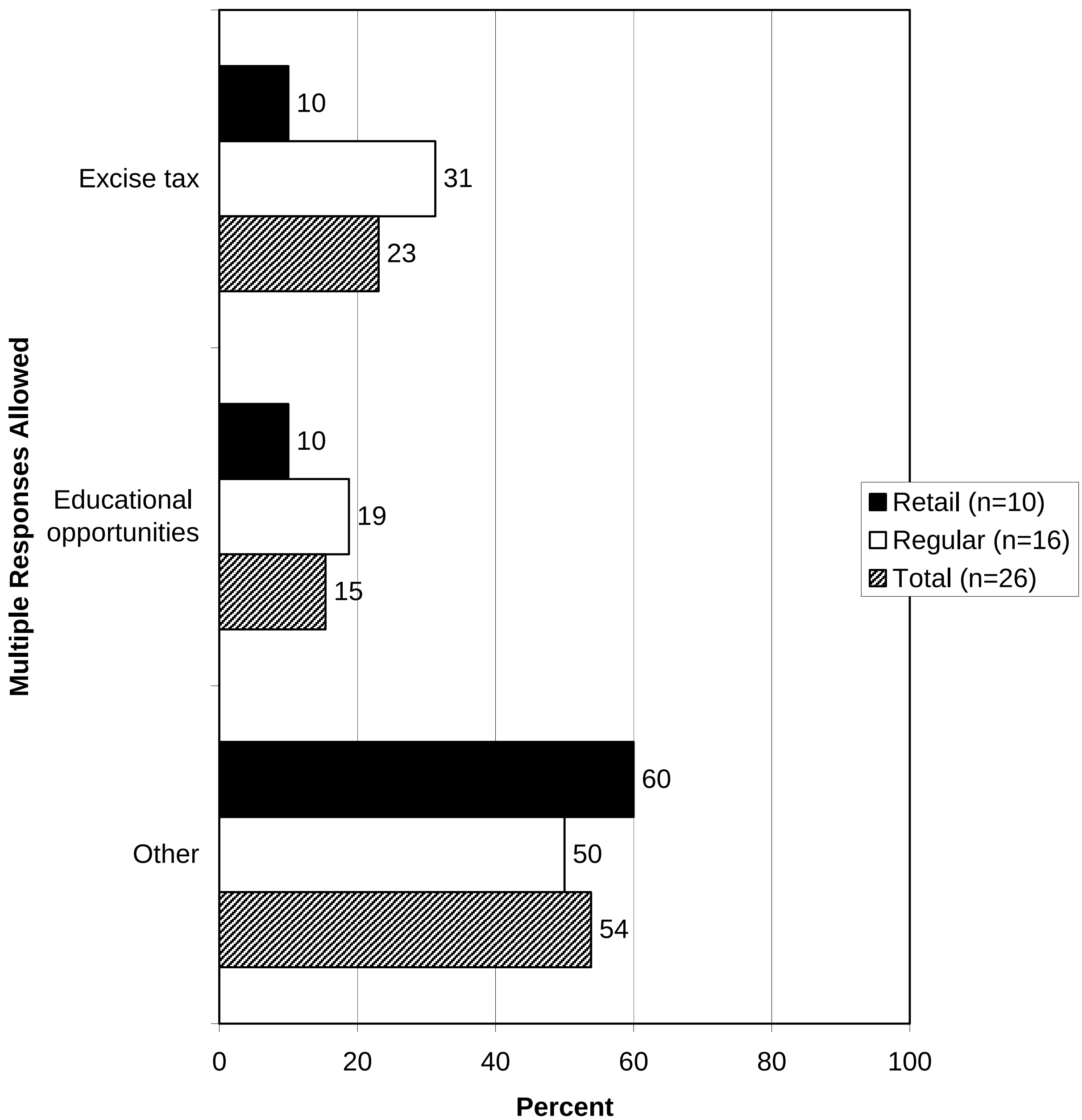
What were these problems or concerns? (Asked of current ATA members whose companies have had problems or concerns that the ATA does not address but with which they would have liked the ATA's assistance.)



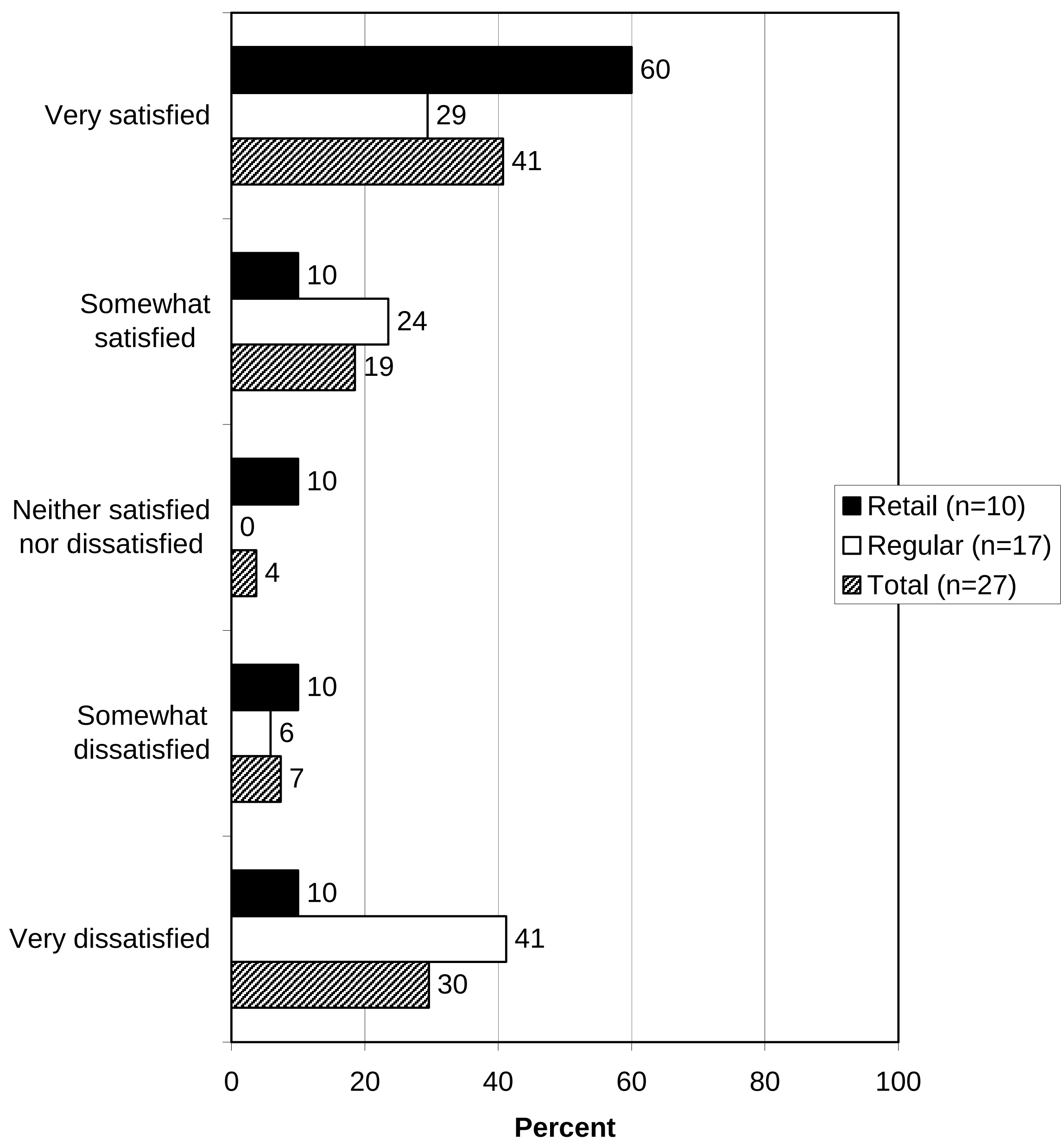
Has your company had any problems or concerns that it has worked directly with the ATA to address?



What were these problems or concerns? (Asked of current ATA members who have worked directly with the ATA to address problems or concerns with their company.)



How satisfied or dissatisfied were you with the ATA's assistance with problems or concerns? (Asked of current ATA members who have worked directly with the ATA to address problems or concerns with their companies.)



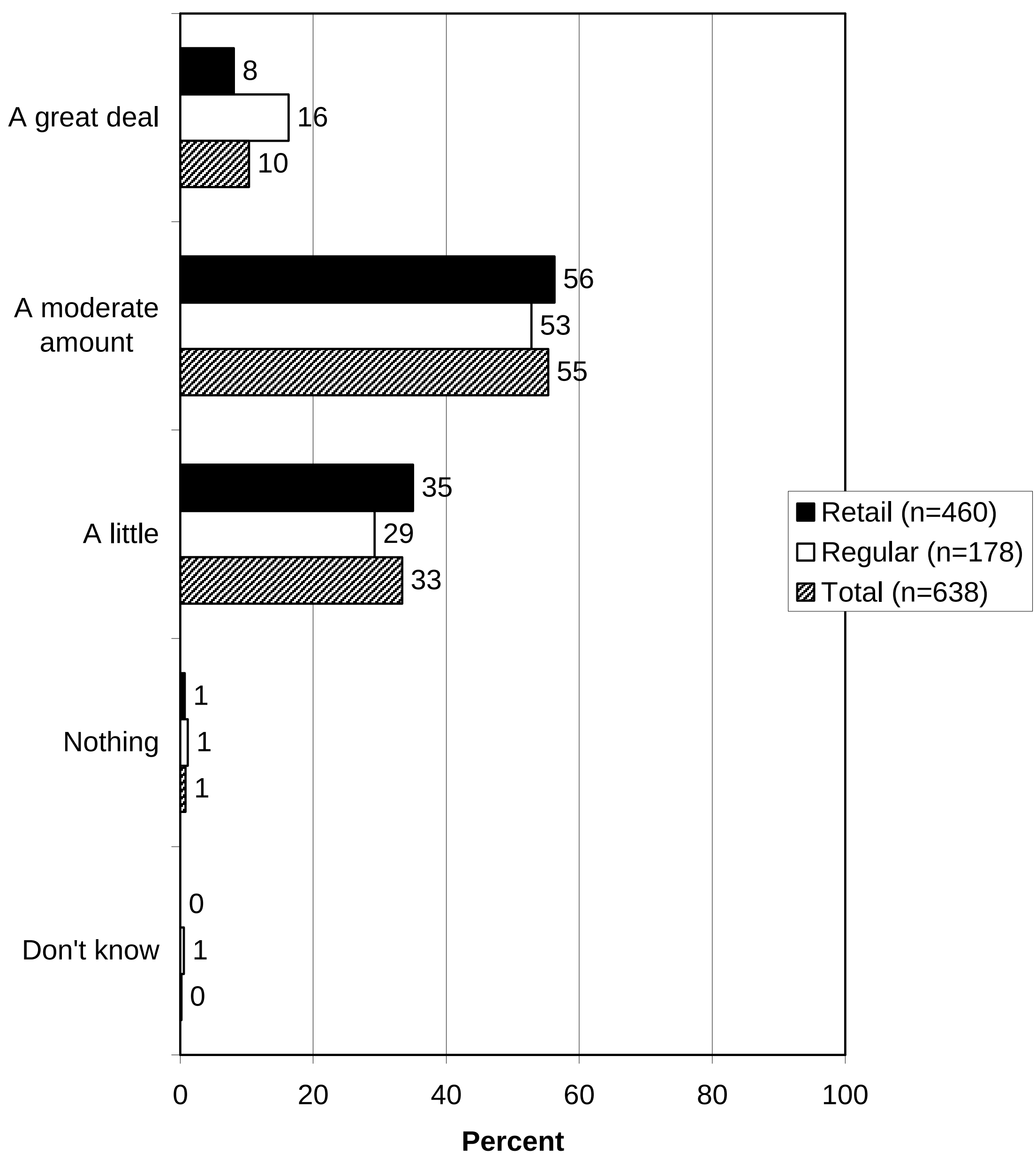
KNOWLEDGE AND AWARENESS OF THE ATA

- The survey asked respondents about their knowledge level of three items: the ATA itself, the activities of the ATA, and the benefits of the ATA. For all three questions, a majority of both groups say that they know “a great deal” or “a moderate amount” (the top half of the scale), but “a moderate amount” is the most common answer.
  - It is worth noting that the majority of responses to the knowledge questions were in the middle of the scale (“a moderate amount” or “a little”) rather than the extremes (“a great deal” or “nothing”).

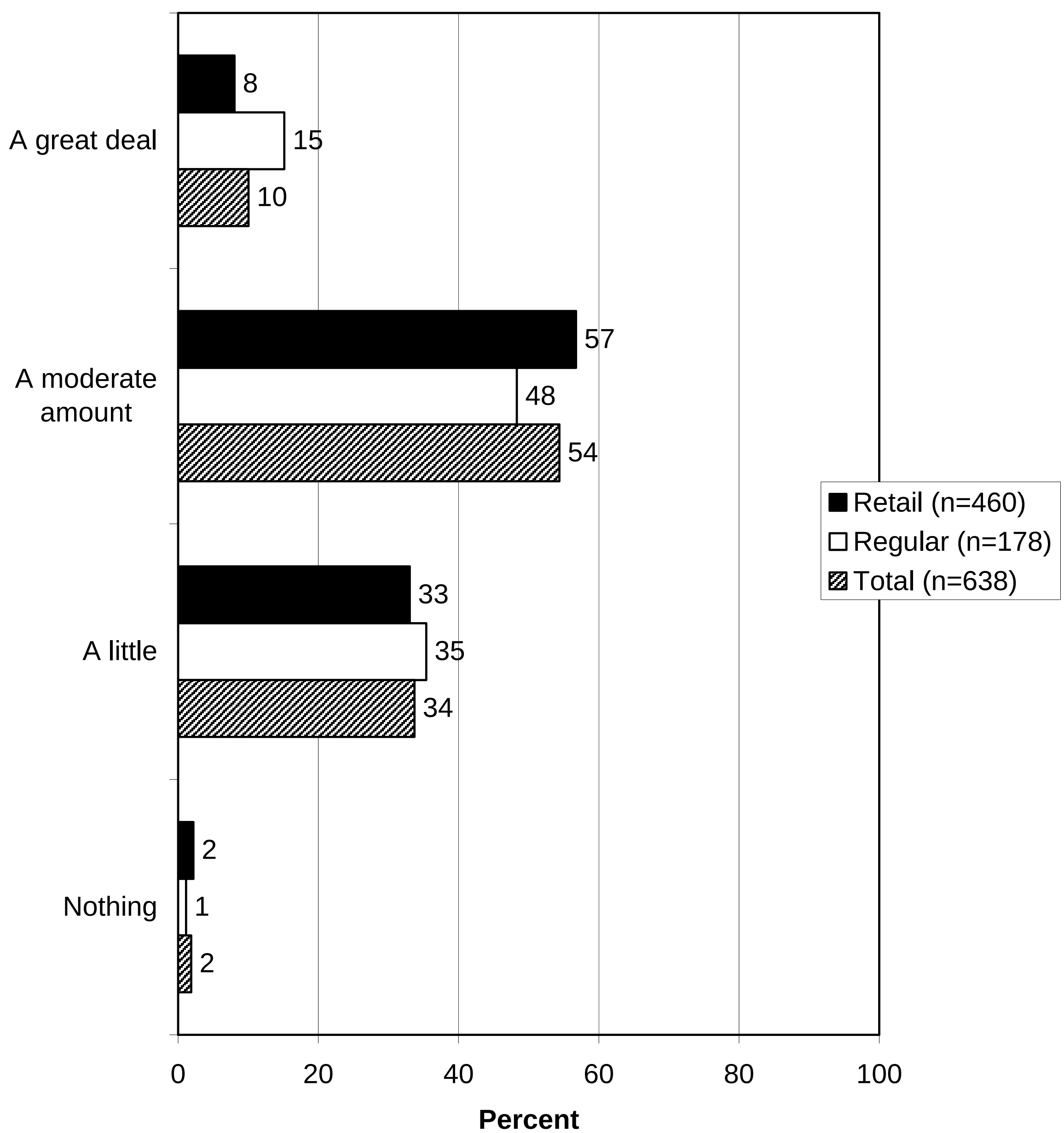
- The survey asked respondents where they get their information about the ATA. The most common sources named by retail members are the ATA column in *Inside Archery*, the ATA column in *ArrowTrade*, the ATA column in *Archery Business*, ATA mailings, the ATA online newsletter, and the ATA website. Among regular members, the most common sources are ATA mailings, the ATA online newsletter, the ATA website, the ATA column in *Inside Archery*, the ATA column in *ArrowTrade*, and the ATA column in *Archery Business*.
  - Those who received telephone calls or e-mails about the ATA were asked to name the specific source: others in the industry, particularly dealers, sales representatives, and manufacturers, are the most common sources.
  - These graphs are shown in the section of this report titled, “Sources of Information About Archery and Bowhunting.” They are discussed here for the reader’s convenience, as they pertain to knowledge and awareness of the ATA.

- When asked to name the preferred way for the ATA to provide them with information about the ATA, retail and regular members most commonly say direct e-mails, direct mail, the ATA online newsletter, *Inside Archery*, *Archery Business*, and *ArrowTrade*.
  - This graph is shown in the section of this report titled, “Sources of Information About Archery and Bowhunting.” It is discussed here for the reader’s convenience, as it pertains to knowledge and awareness of the ATA.

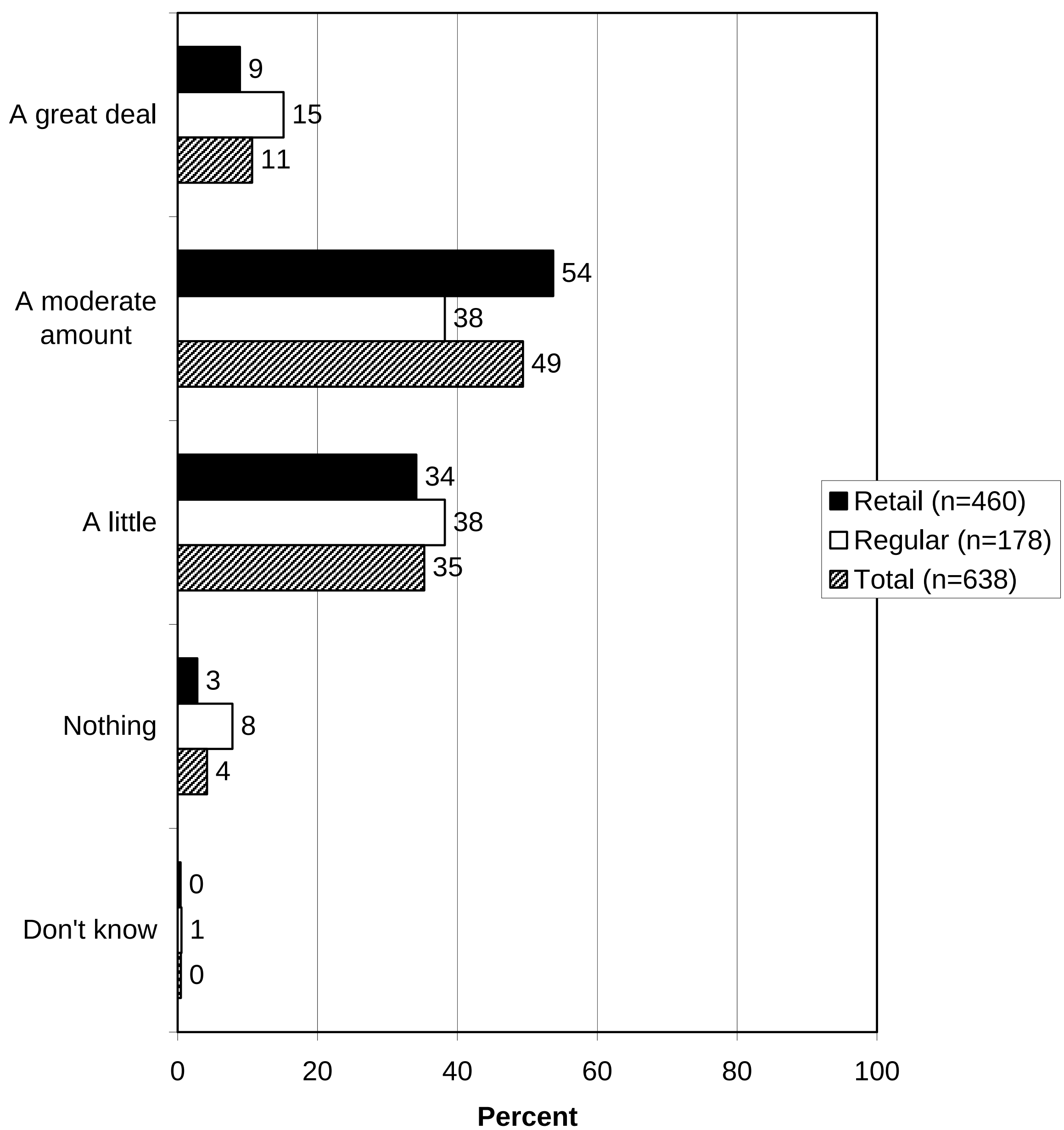
Would you say you know a great deal, a moderate amount, a little, or nothing about the ATA?



Would you say you know a great deal, a moderate amount, a little, or nothing about the activities of the ATA?



Would you say you know a great deal, a moderate amount, a little, or nothing about the benefits of ATA membership?



MOTIVATIONS FOR ATA MEMBERSHIP AND REASONS FOR NOT RENEWING MEMBERSHIP IN THE ATA

- Each respondent was asked to name the most important reason their company became a member of the ATA. Retail members most commonly said to be affiliated with the ATA Trade Show (36%) and to help grow the sports of archery and bowhunting/because of common goals (28%). Regular members most commonly said to be affiliated with the ATA Trade Show (41%), to help grow the sports of archery and bowhunting/because of common goals (28%), and for recognition and exposure (20%).
  - In a question that also pertains to motivation, each respondent was read a list of potential influences and asked to name the one that had the most influence on their decision to join the ATA. The top influence, by far, among both retail and regular members was the ATA Trade Show.

- When asked what they like most about being an ATA member, retail members most commonly said the Trade Show (by far the top answer), information and publications, and the benefits of the ATA and support provided by the ATA. Regular members said the Trade Show, the ability to network through the ATA (and at the show), and information and publications.

- When asked what they like the least about being an ATA member, retail members most commonly say that there is nothing they dislike; otherwise, the location of the show and the cost of membership are most commonly named. Regular members also most commonly say that there is nothing they dislike; otherwise, the most common answer is cost. This study did not address whether these dissatisfactions would be strong enough reasons to cause respondents to *not* renew their memberships, but they are issues about which the ATA should be aware.

- The survey asked about 12 potential programs/benefits as incentives for renewing membership (retail members were asked only about 9 of the 12, regular members were asked about 11 of the 12). Specifically, for each program/benefit, the survey asked respondents if it would make them more likely to renew their membership, less likely, or whether it would have no effect on their renewal decisions.

- Among retail members, six of the nine potential programs/benefits are closely grouped, all with more than 80% saying the potential program/benefit would make them more likely to renew their membership, listed below.
  - Increased efforts to work with state/local authorities to expand bowhunting opportunities (88%).
  - Programs to connect local dealers with school and community archery/bowhunting programs (87%).
  - A program to work with cities and counties to improve recreational archery programs and ranges (87%).
  - Increased efforts to partner with agencies to grow archery and bowhunting (85%).
  - Increased efforts to motivate agencies to spend more federal excise taxes to grow archery and bowhunting (83%).
  - Working with cities to eliminate shooting ordinances and expand shooting opportunities (83%).
- Among regular members, five of the eleven potential programs/benefits have more than 70% saying the potential program/benefit would make them more likely to renew their membership, listed below.
  - Increased efforts to work with state/local authorities to expand bowhunting opportunities (80%).
  - Increased efforts to partner with agencies to grow archery and bowhunting (79%).
  - Working with cities and counties to improve recreational archery programs and ranges (77%).
  - Increased efforts to motivate state agencies to spend more federal excise tax funds on growing archery and bowhunting (75%).
  - Programs to connect local dealers with school and community archery and bowhunting programs (74%).

➢ After the series of questions about various programs/benefits that would motivate respondents to renew their memberships, they were asked in an open-ended question if there are any other programs or member benefits that they would like to see the ATA provide its members. Overwhelming majorities of retail, regular, and lapsed members indicate that there are no other programs or benefits that they would like to see the ATA provide; otherwise, various things were said by small percentages, with no one item being mentioned by markedly higher percentages than other items.

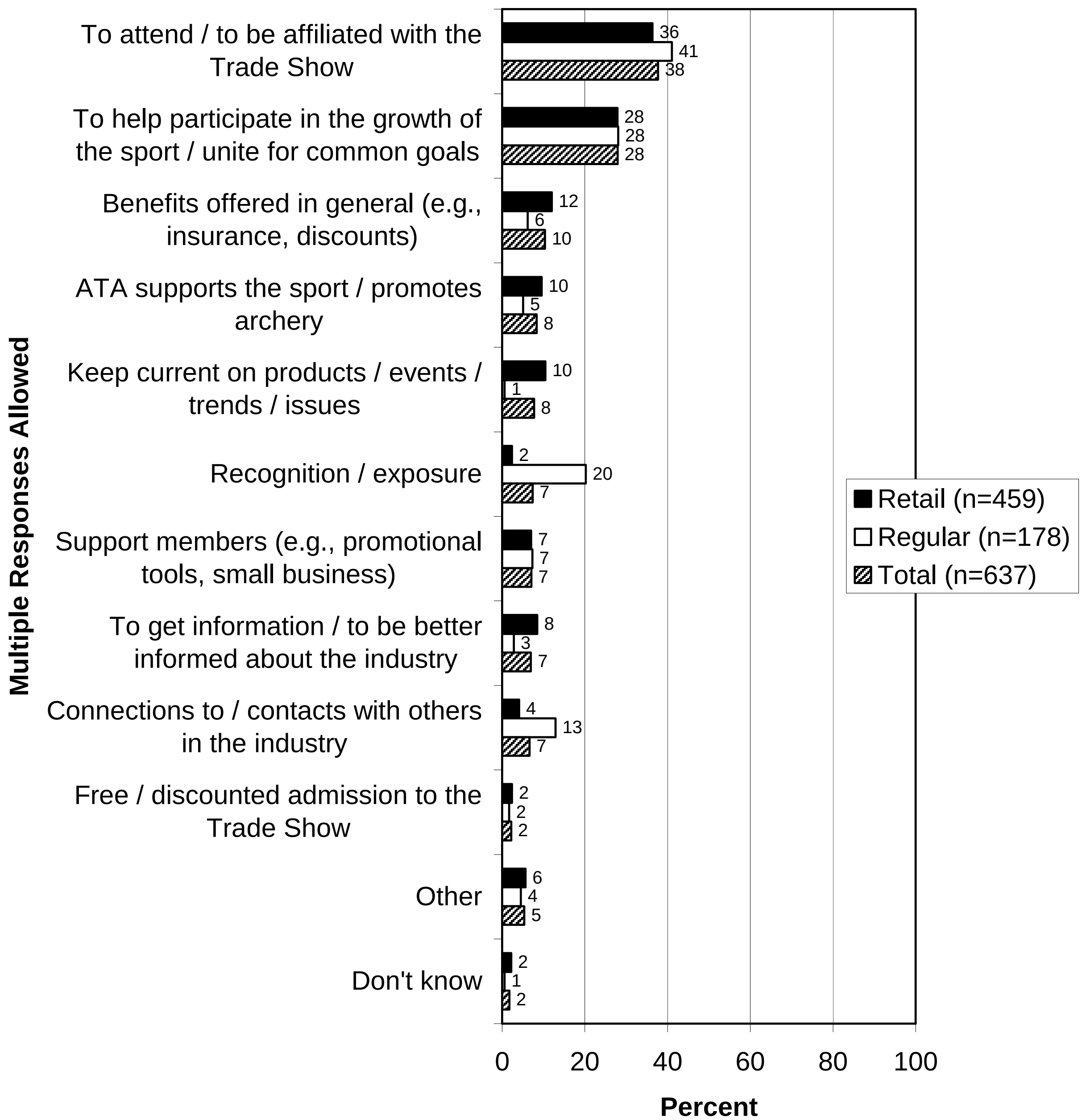
- The survey asked respondents in an open-ended question how the ATA could improve the value of membership. Interestingly, 14% of retail members and 7% of regular members said that there was nothing that needed to be improved. Otherwise, retail and regular members most commonly said better/more benefits, more support for members, better communications, and reduced cost.

- It does not appear that the cost of dues is an important reason that people are *not* renewing their membership: overwhelming majorities of respondents (88% of retail members, 72% of regular members) say that current ATA membership dues are about the right amount, and only 7% of retail and 17% of regular members say that the dues are too high.
  - This graph is shown in the section of this report titled, "ATA Dues."

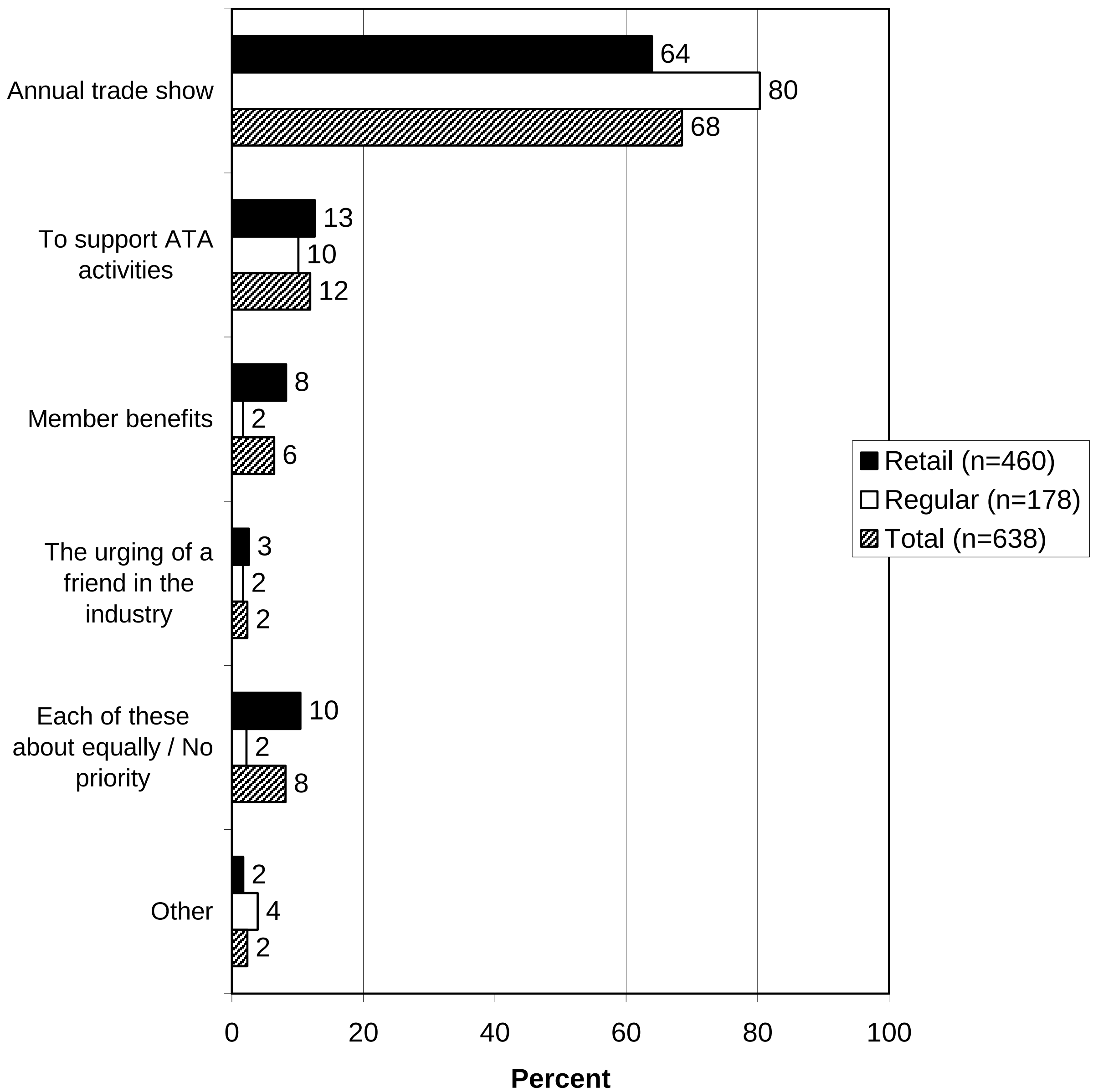
- Overwhelming majorities indicated being *very* likely (96% of retail and 89% of regular members) to renew their membership this year. When looking at *very* and *somewhat* likely combined, 99% of retail and 98% of regular members indicate being likely to renew their membership.
  - The survey also asked about the likelihood of being a member 5 years hence, and most movement is from *very* likely to *somewhat* likely (rather than to "not likely"): 85% of retail members and 73% of regular members say they will be *very* likely, and 96% and 92%, respectively, say they will be *very* or *somewhat* likely.

- Respondents whose memberships were not current (valid) at the time of the interview—in other words, lapsed members—were asked why they had not renewed their ATA memberships. The most common answers are because they did not attend the Trade Show, they forgot/accidentally let the membership lapse, or that they see no benefit in being a member.

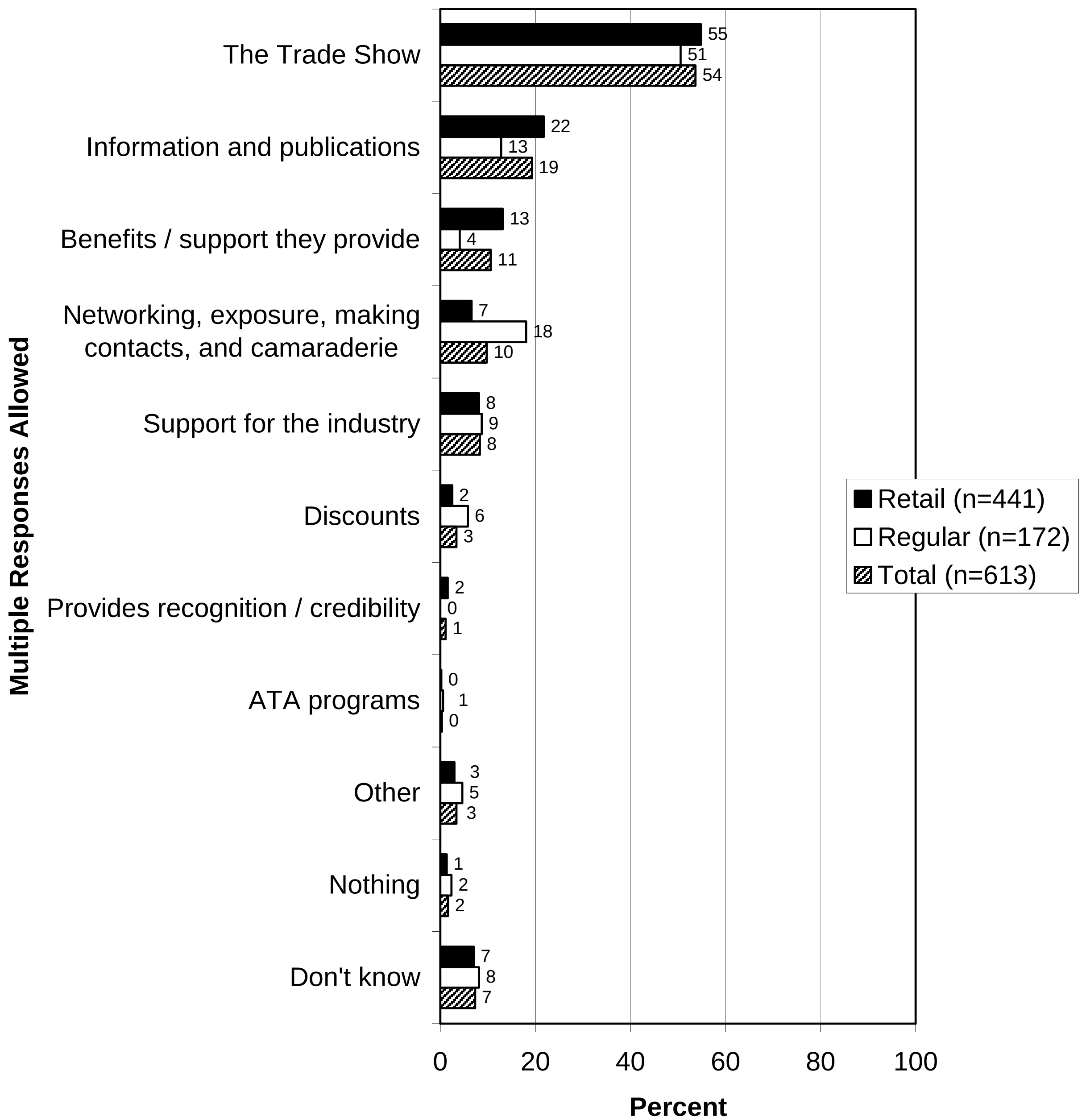
What is your most important reason for becoming a member of the ATA?



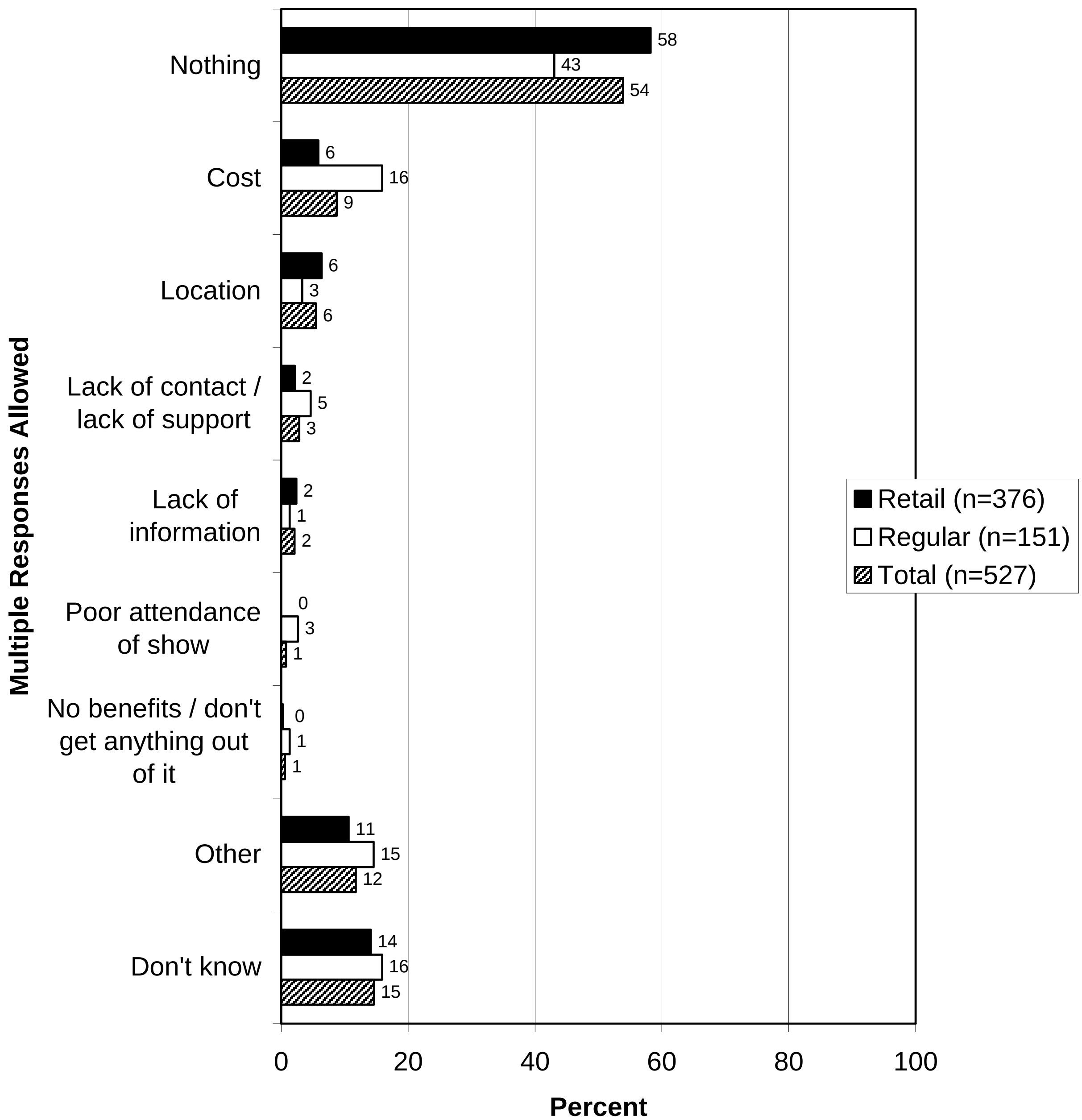
Which one of the following would you say had the most influence on your decision to join the ATA?



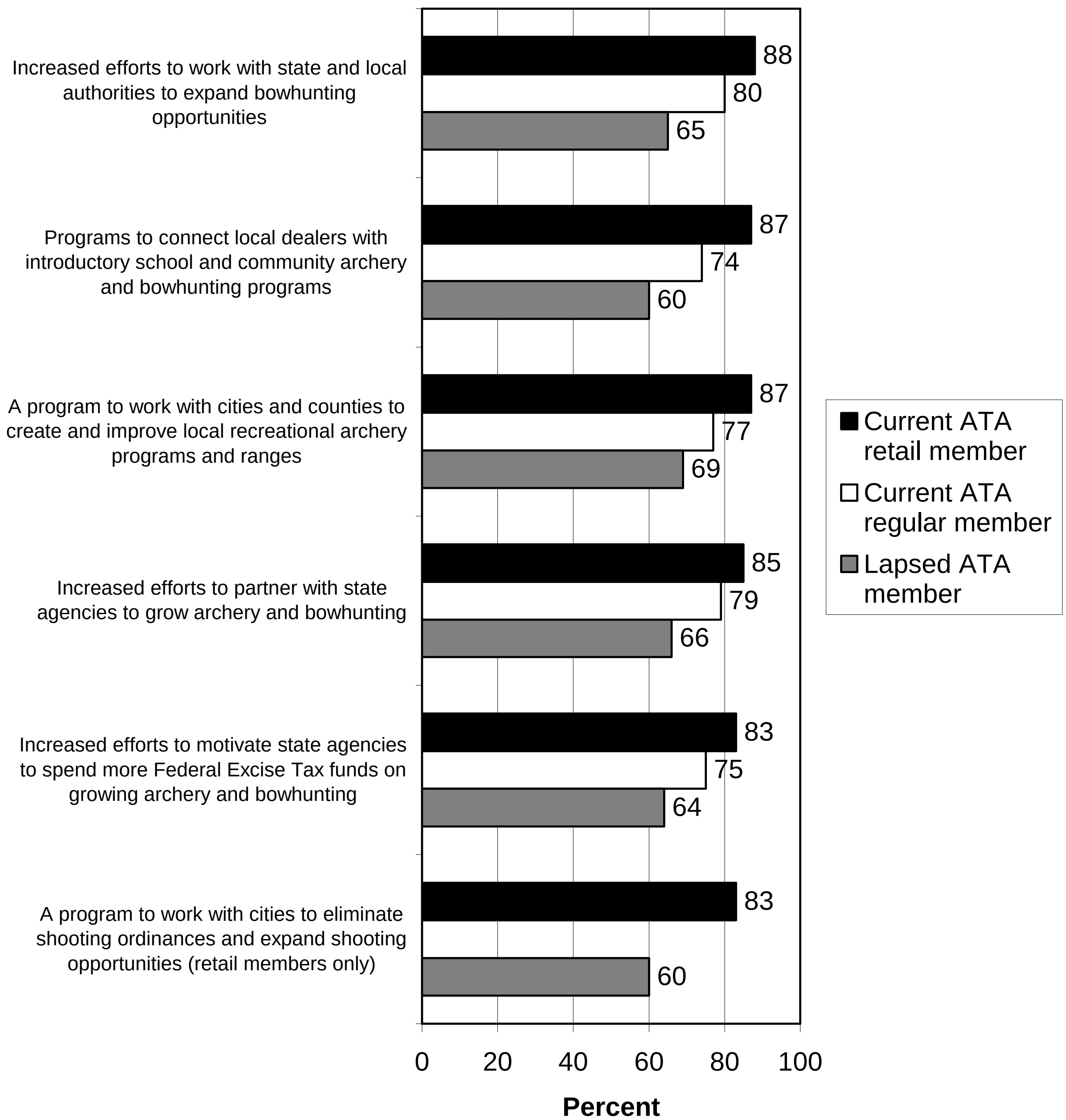
What do you like most about being an ATA member?



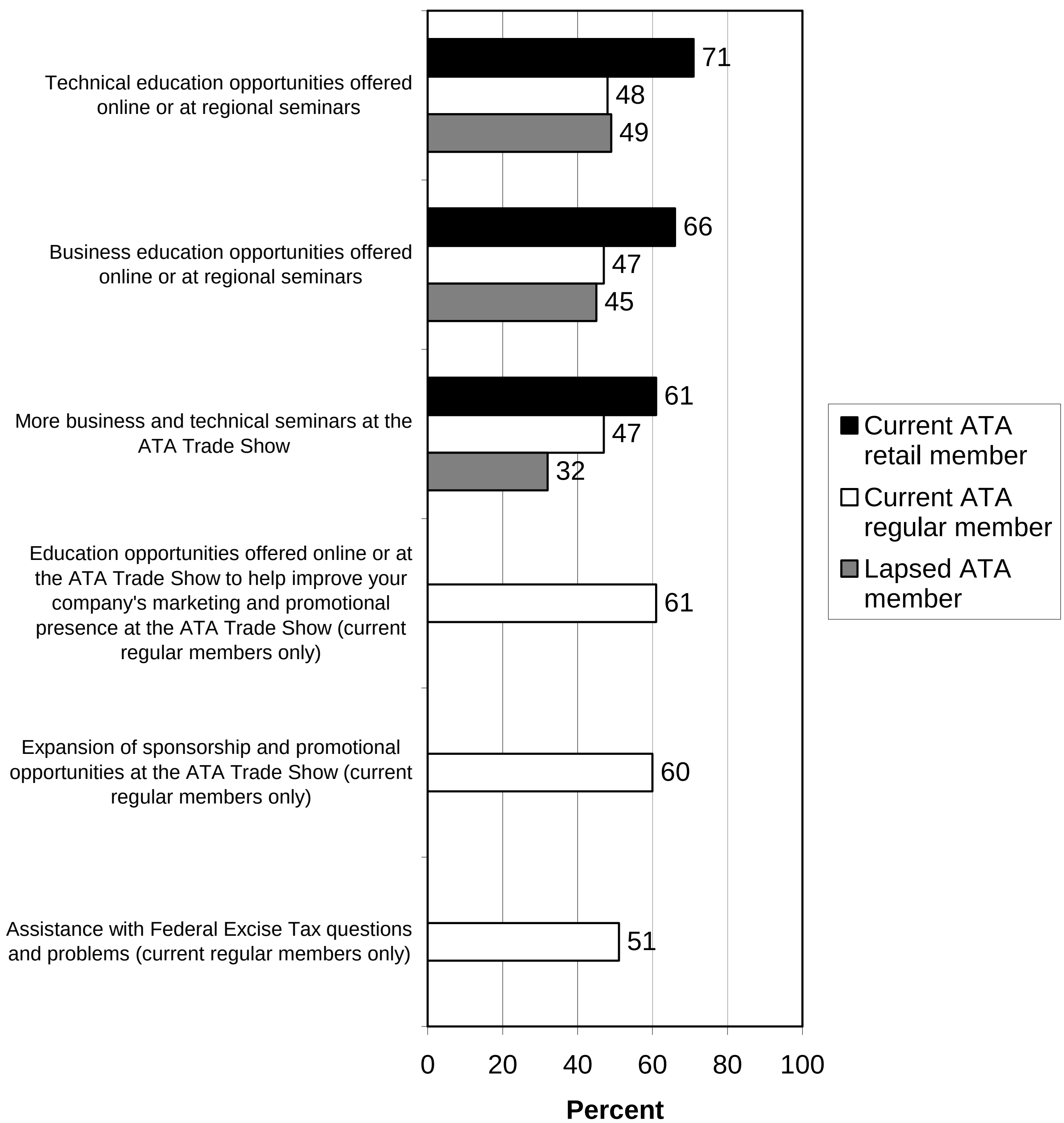
What do you like least about being an ATA member?

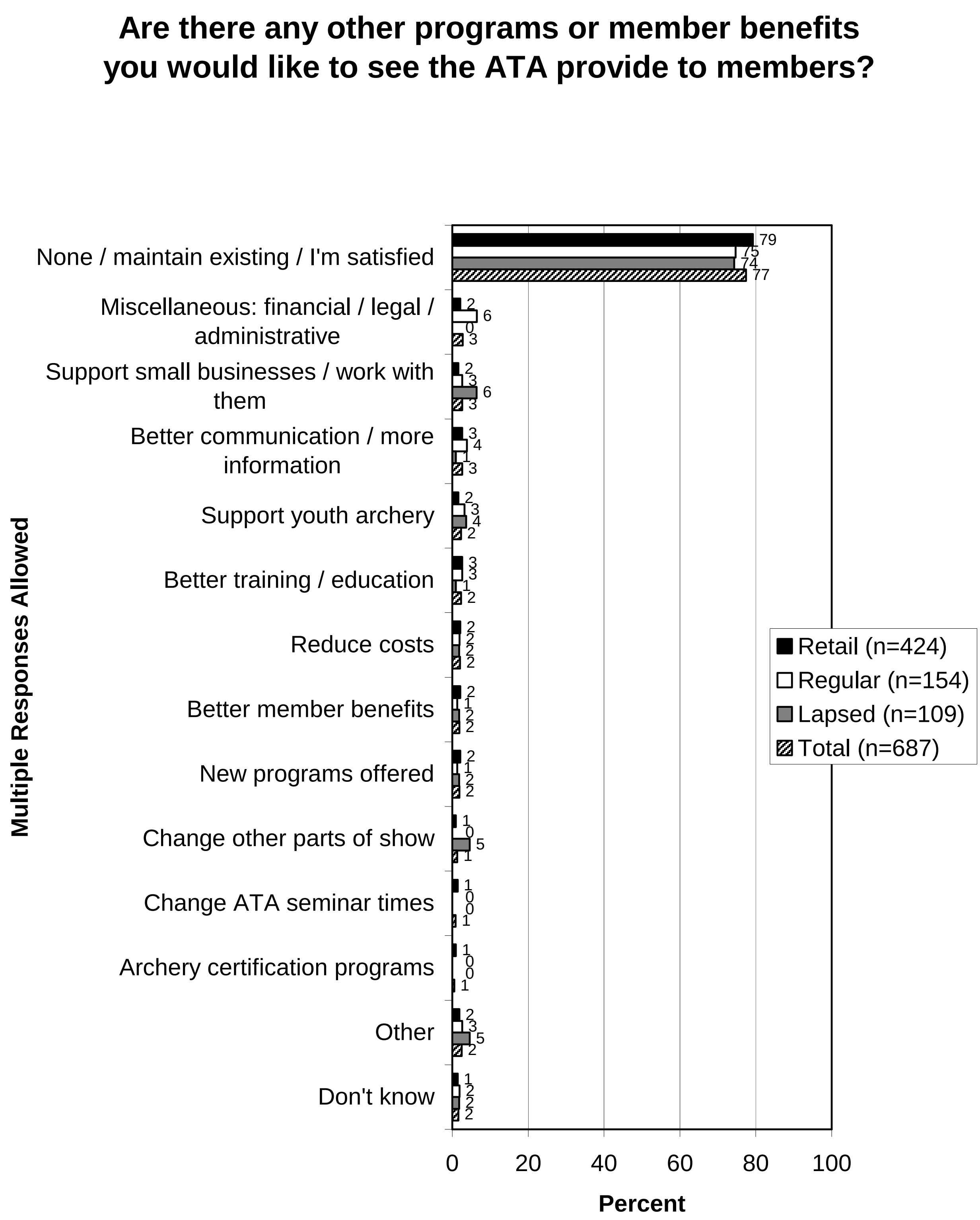


Percent who indicated that the following potential programs and benefits would make them more likely to renew their membership in the future. (Part 1)

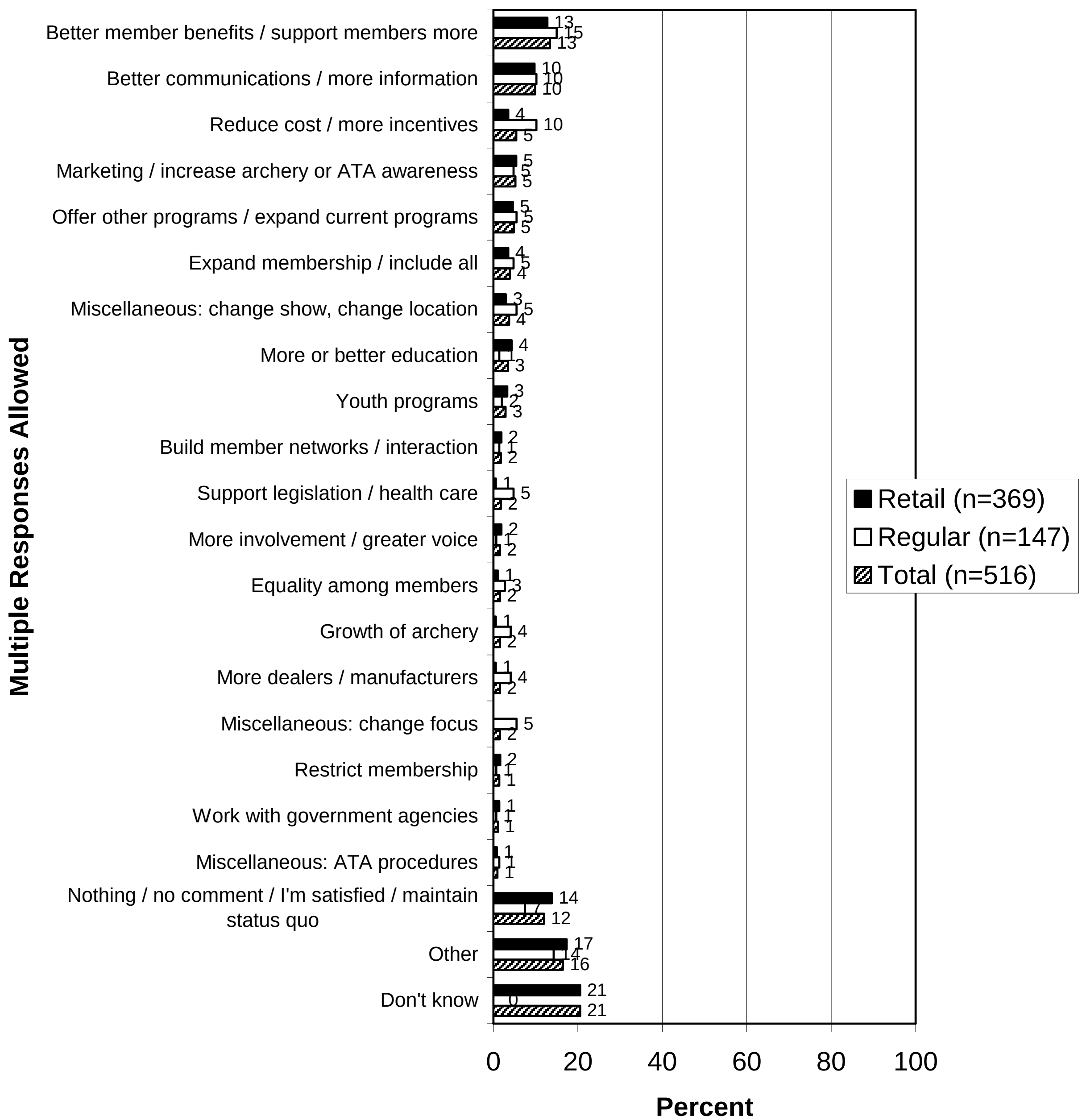


Percent who indicated that the following potential programs and benefits would make them more likely to renew their membership in the future. (Part 2)

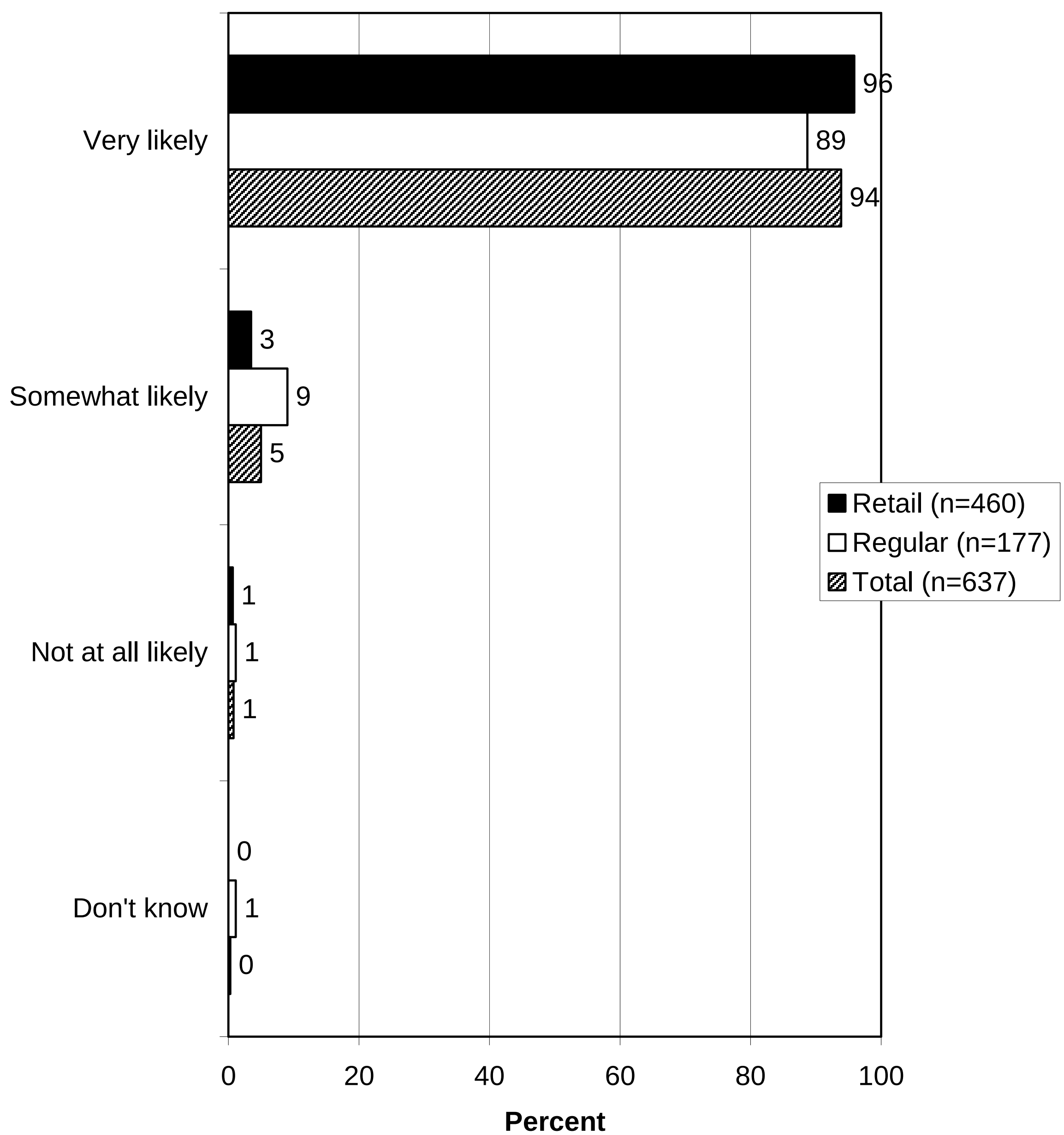



Are there any other programs or member benefits you would like to see the ATA provide to members?
Multiple Responses Allowed
None / maintain existing / I'm satisfied
79
75
74
77
Miscellaneous: financial / legal / administrative
2
6
0
3
Support small businesses / work with them
2
3
6
3
Better communication / more information
3
4
1
3
Support youth archery
2
3
4
2
Better training / education
3
3
1
2
Reduce costs
2
2
2
2
Better member benefits
2
1
2
2
New programs offered
2
1
2
2
Change other parts of show
1
0
5
1
Change ATA seminar times
1
0
0
1
Archery certification programs
1
0
0
1
Other
2
3
5
2
Don't know
1
2
2
2
Retail (n=424)
Regular (n=154)
Lapsed (n=109)
Total (n=687)
0
20
40
60
80
100
Percent

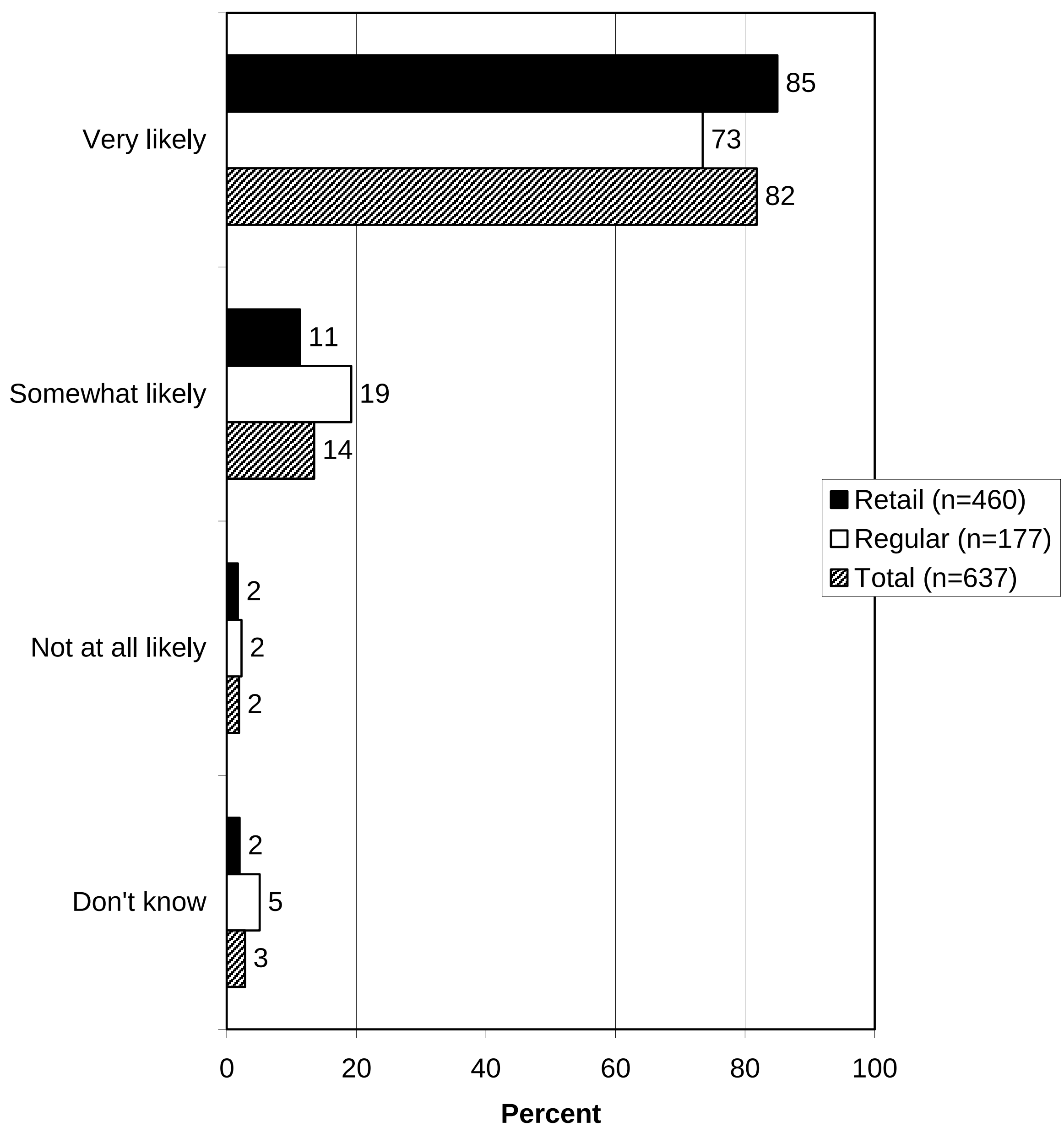
In your opinion, how can the ATA improve the value of membership? (Asked of current ATA members who agree that the ATA can improve the value of membership in its association.)



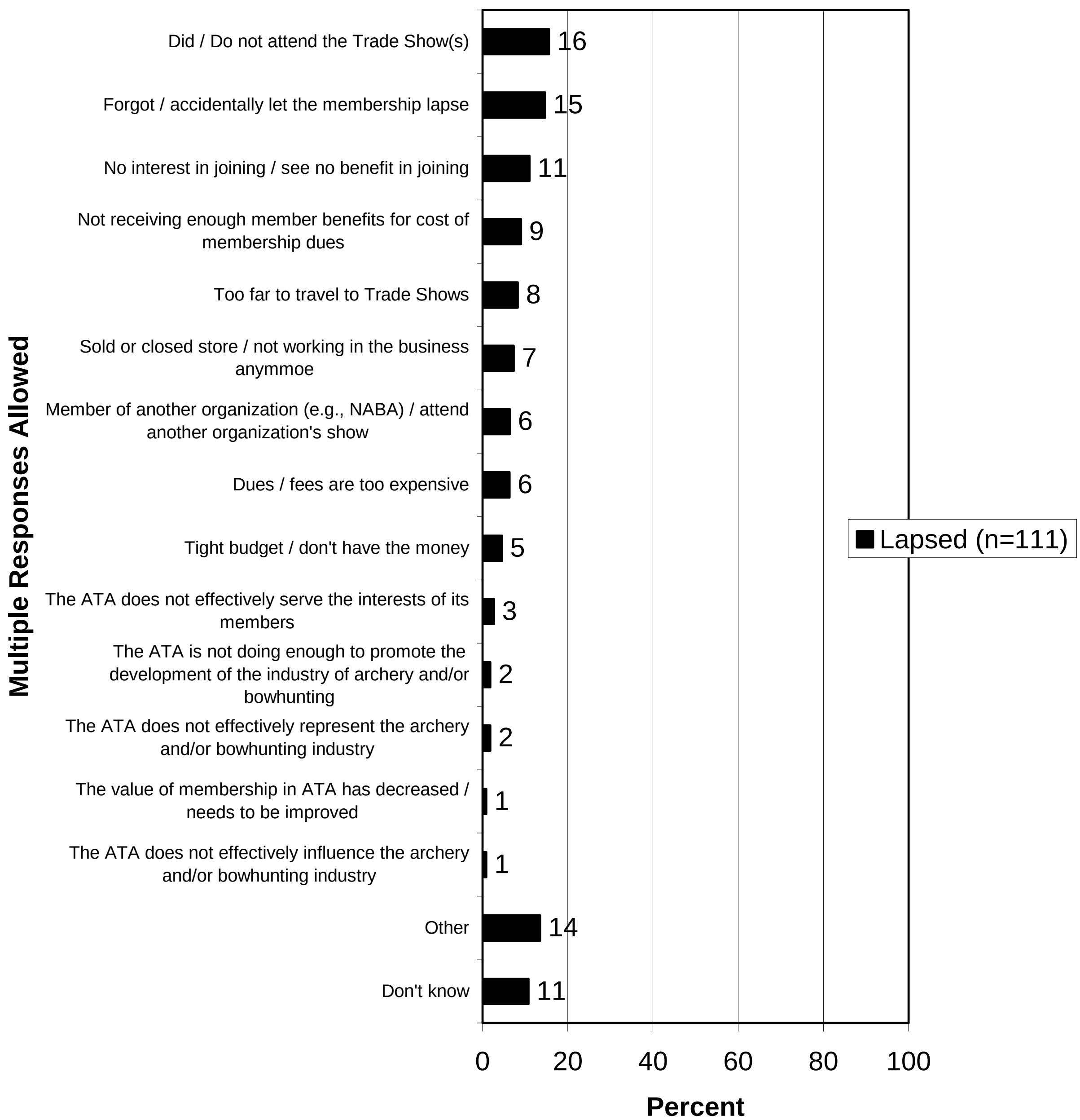
How likely are you to renew your ATA membership this year? Would you say you are very likely, somewhat likely, or not at all likely?



How likely would you say you are to be a member of ATA 5 years from now? Would you say you are very likely, somewhat likely, or not at all likely?



What are the reasons you did not renew your ATA membership? (Asked of those who are not current members of the ATA but have been a member of the ATA or AMO in the past.)



PROGRAMS OF AND BENEFITS PROVIDED BY THE ATA

RATINGS OF IMPORTANCE AND PERFORMANCE OF PROGRAMS AND BENEFITS

- The survey asked respondents about the importance of 16 programs and/or benefits that the ATA provides to members on a scale of 0 to 10, with "0" being not at all important and "10" being extremely important. This analysis looks not only at the actual means and percentages of respondents giving certain answers, but it also looks at the ranking of the programs/benefits—i.e., how each program/benefit is perceived relative to other programs/benefits. (Retail members were asked about 16 programs/benefits; regular members were asked about 15 programs/benefits.)
  - Retail members give the highest mean ratings of importance to the ATA's work on broad, national issues rather than to specific, tangible services that the ATA provides.
    - Among the top programs/benefits in importance (all with a mean rating above 9.00) are providing support for efforts to grow archery and bowhunting (mean of 9.35), representing the industry in Congress and among national leaders (9.30), protecting bowhunting by working with state agencies on regulations and management (9.21), and influencing legislation, agency programs, and business issues (9.10). These are all rather broad efforts. The other program/benefit with a mean of more than 9.00 is providing the ATA Trade Show (9.11).
    - Lowest down on the ranking among retail members are specific, tangible programs/benefits: access to the ATA member list (mean of 6.83), providing ATA's Industry Benefits Health Plan (6.84), offering service provider programs like business insurance (7.42), and providing discounts on books and publications (7.43). (A word of caution: a low rating of importance can simply mean that a program/benefit is not a top-of-mind issue—perhaps because there are no problems with it—rather than because it is of no importance; on the other hand, some programs/benefits might be of no actual importance to respondents.)
  - Regular members give similar ratings to those of retail members, particularly at the top, with regular members' highest mean ratings being for those aforementioned broad, national programs/benefits.

- In comparing retail and regular members' ratings, they differ markedly on several items. In general, retail members give higher importance ratings than do regular members. Specific results included those discussed below.
  - Retail members give markedly higher ratings to providing access to industry magazines; providing member training, seminars, and classes; and providing directory listings on archerysearch.com and Black's directory. Retail members also give higher ratings to three programs/benefits that are in the lower part of both rankings: providing discounts on books and publications, offering service provider programs, and providing the Health Plan.
  - Regular members give higher ratings than do retail members for access to the ATA member list (although, overall, both groups give low ratings to this).

➢ The surveys asked respondents to rate how well the ATA performs these programs/benefits, where "0" is poor and "10" is excellent. The good news is that *all* programs/benefits have mean ratings well above the midpoint—meaning that the ATA's performance is positively perceived.

- Retail members give high performance ratings to four of the same five programs/benefits that they think are highly important: providing the ATA Trade Show; representing the industry in Congress and among national leaders; providing support for efforts to grow archery and bowhunting; and influencing legislation, agency programs, and business issues. Of those top programs/benefits in importance, only protecting bowhunting by working with state agencies on regulations and management is ranked notably lower in performance than in importance.
  - In addition to the four high-rated programs/benefits just discussed, three other programs/benefits have high performance ratings among retail members: access to industry magazines; member training, seminars, and classes; and the directory listings (archerysearch.com and Black's).
  - Low performance ratings (relatively speaking) are given by retail members to providing the Health Plan, offering service provider programs like business insurance, and providing discounts on books and publications.

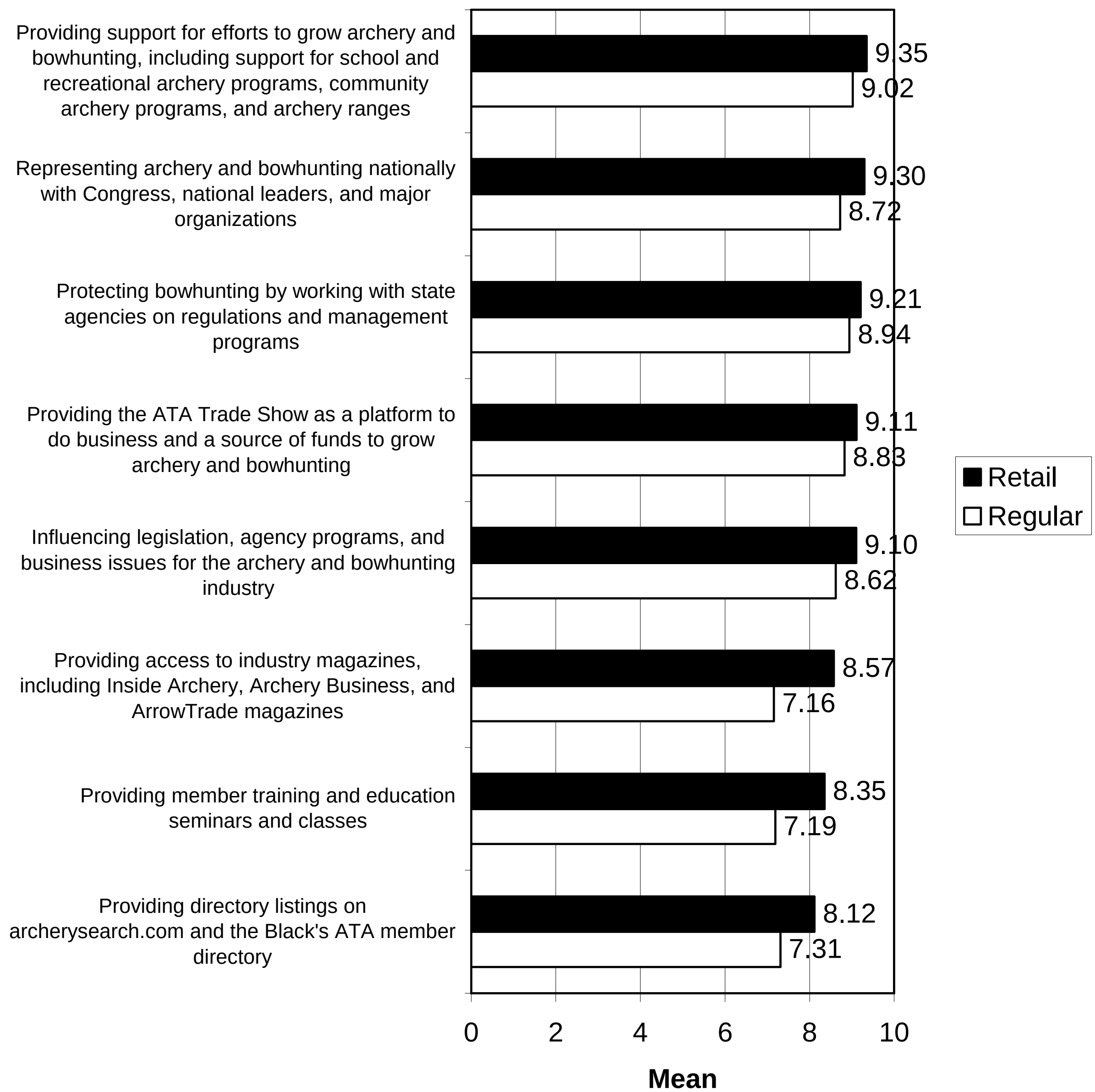
- Among regular members, three of the five most important programs/benefits are highly rated in performance: providing the ATA Trade Show, representing the industry in Congress and among national leaders, and providing support for efforts to grow archery and bowhunting.
  - Also highly rated in performance among regular members are access to the ATA member list, providing the directory listings, and providing access to industry magazines.
  - Low performance ratings (again, relatively speaking) are given by regular members to providing the Health Plan, providing discounts on books and publications, and offering service provider programs like business insurance.
- A comparison shows that four programs/benefits have somewhat higher performance ratings among retail members than among regular members: providing discounts on books and publications; providing member discounts, programs, and benefits at the ATA Trade Show; providing access to and information about industry business trends; and providing access to industry magazines.

➢ Another way to look at importance and performance ratings is to compare the ratings using a scatterplot, with one axis showing the importance ratings and the other axis showing the performance ratings. This shows whether the performance of a program/benefit is commensurate to the importance placed on it. In the scatterplots, a diagonal line shows where performance would be commensurate with importance (i.e., the axes are equal); items well above that line have a performance that is not commensurate with its importance. Conversely, items below the line have a performance rating that appears to exceed its importance.

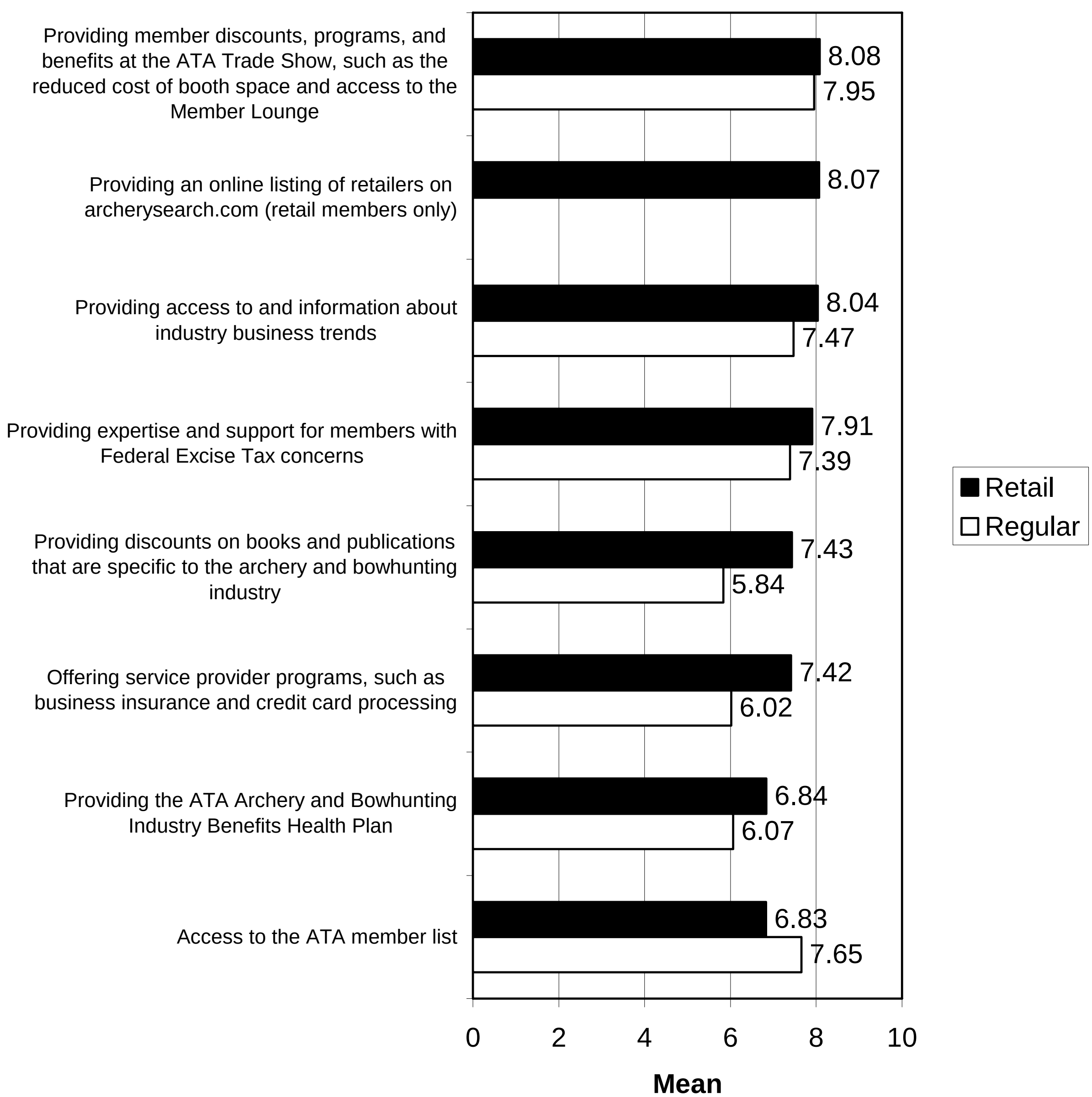
- Among retail members, the scatterplot shows that the performance at the programs and benefits by the ATA, in general, is commensurate with the importance placed on them. Note that the scatterplot shows the programs and benefits clustered fairly well along the line of equal axes, with the performance rated high for those programs/benefits considered the most important. However, there are two programs/benefits somewhat distant from that line: access to the ATA member list (where performance exceeds perceived importance) and protecting bowhunting by working with state agencies on regulations and management programs (where performance is not commensurate with the importance placed on it).

- Among regular members, the scatterplot also shows that the performance at the programs and benefits by the ATA, in general, is commensurate with the importance placed on them. There are two programs for which performance is not commensurate with the importance placed on them: protecting bowhunting by working with state agencies on regulations and management programs, and providing support for efforts to grow archery and bowhunting.

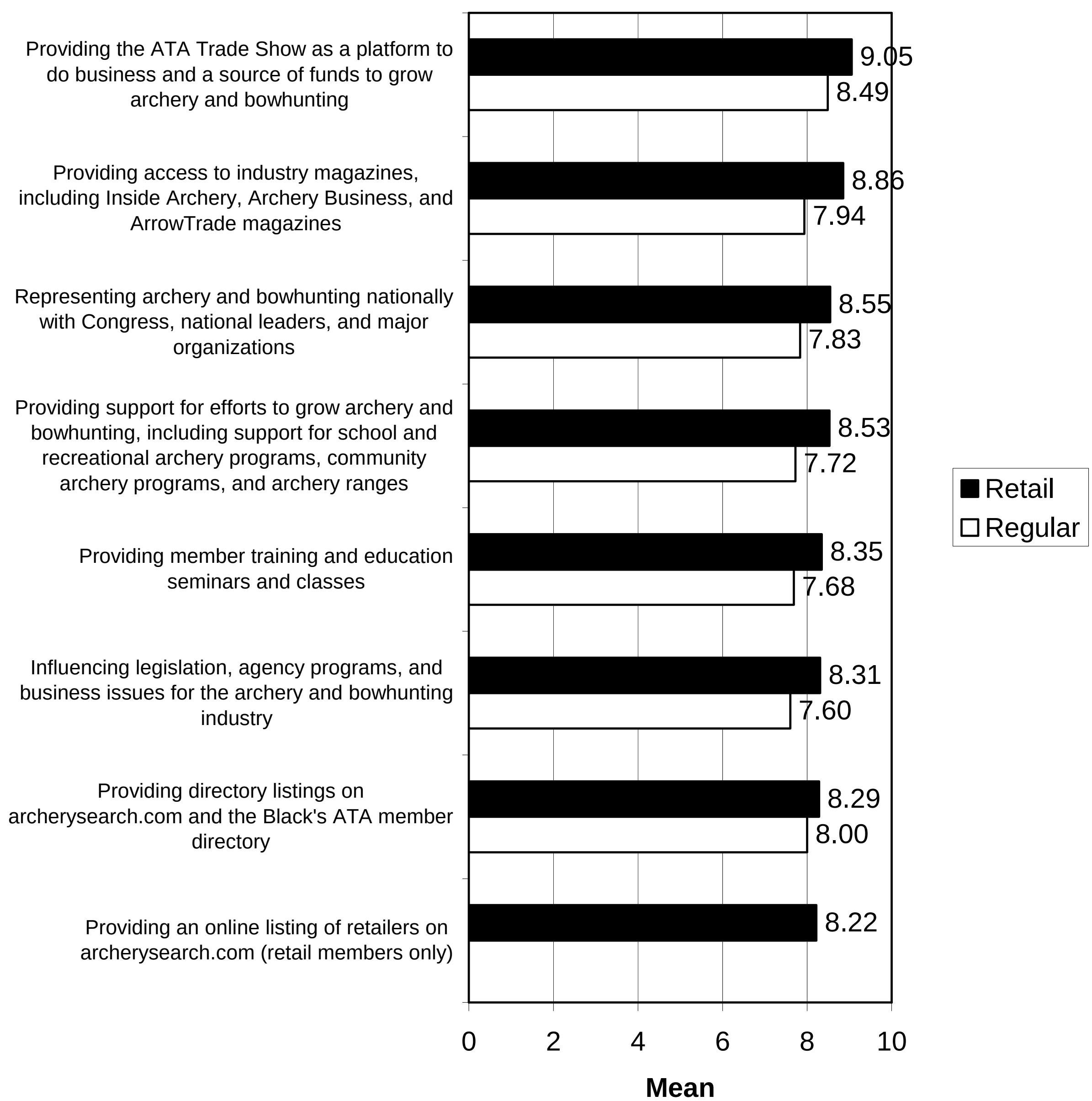
On a scale of 0-10, where 0 is "not at all important" and 10 is "extremely important," current ATA members' mean ratings of importance of the following programs or benefits. (Part 1)



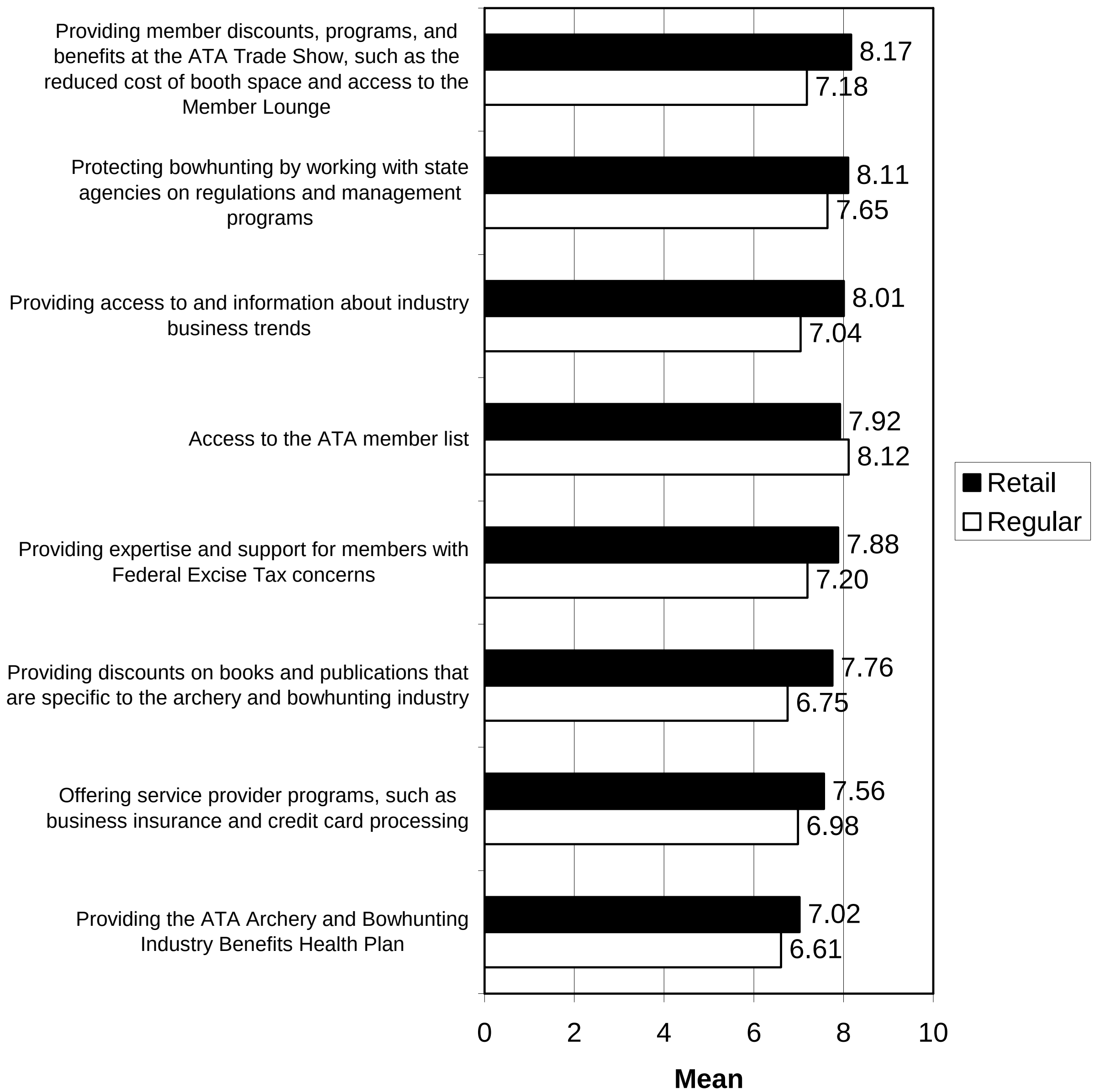
On a scale of 0-10, where 0 is "not at all important" and 10 is "extremely important," current ATA members' mean ratings of importance of the following programs or benefits. (Part 2)



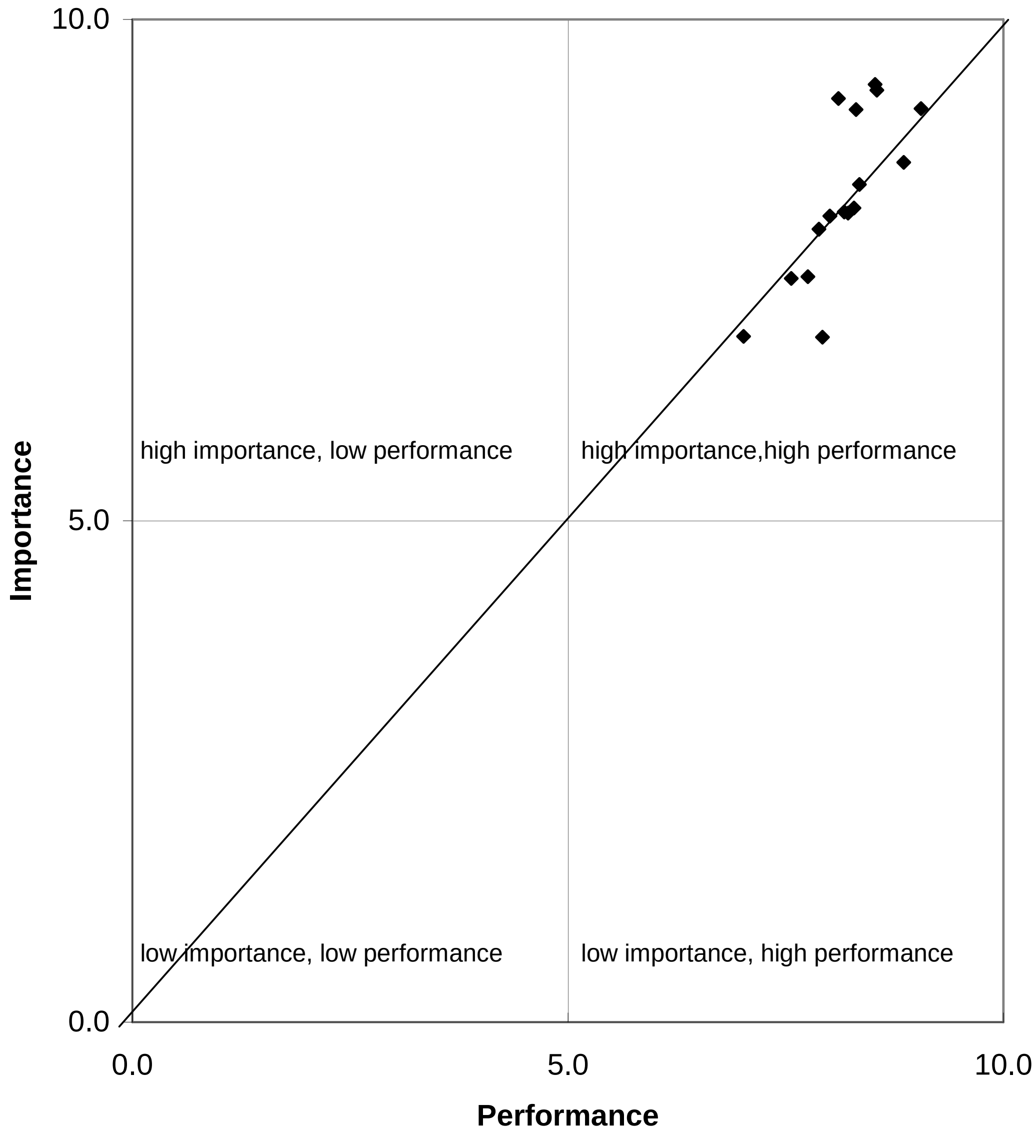
On a scale of 0-10, where 0 is "poor" and 10 is "excellent," current ATA members' mean rating of performance of the ATA at the following programs or efforts. (Part 1)



On a scale of 0-10, where 0 is "poor" and 10 is "excellent," current ATA members' mean rating of performance of the ATA at the following programs or efforts. (Part 2)

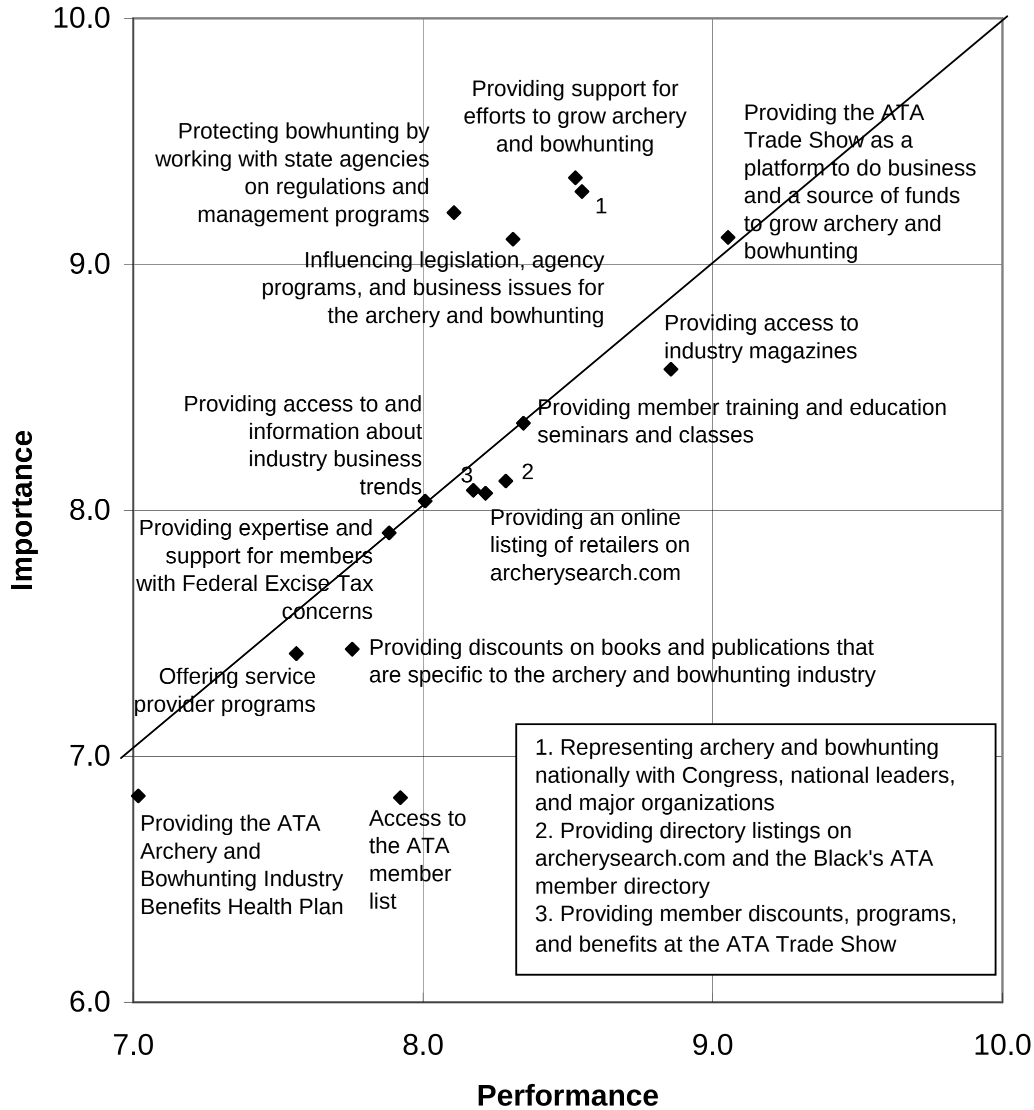


**Comparison of ratings of importance and performance of programs and benefits the ATA provides its members.
(Retail members)**

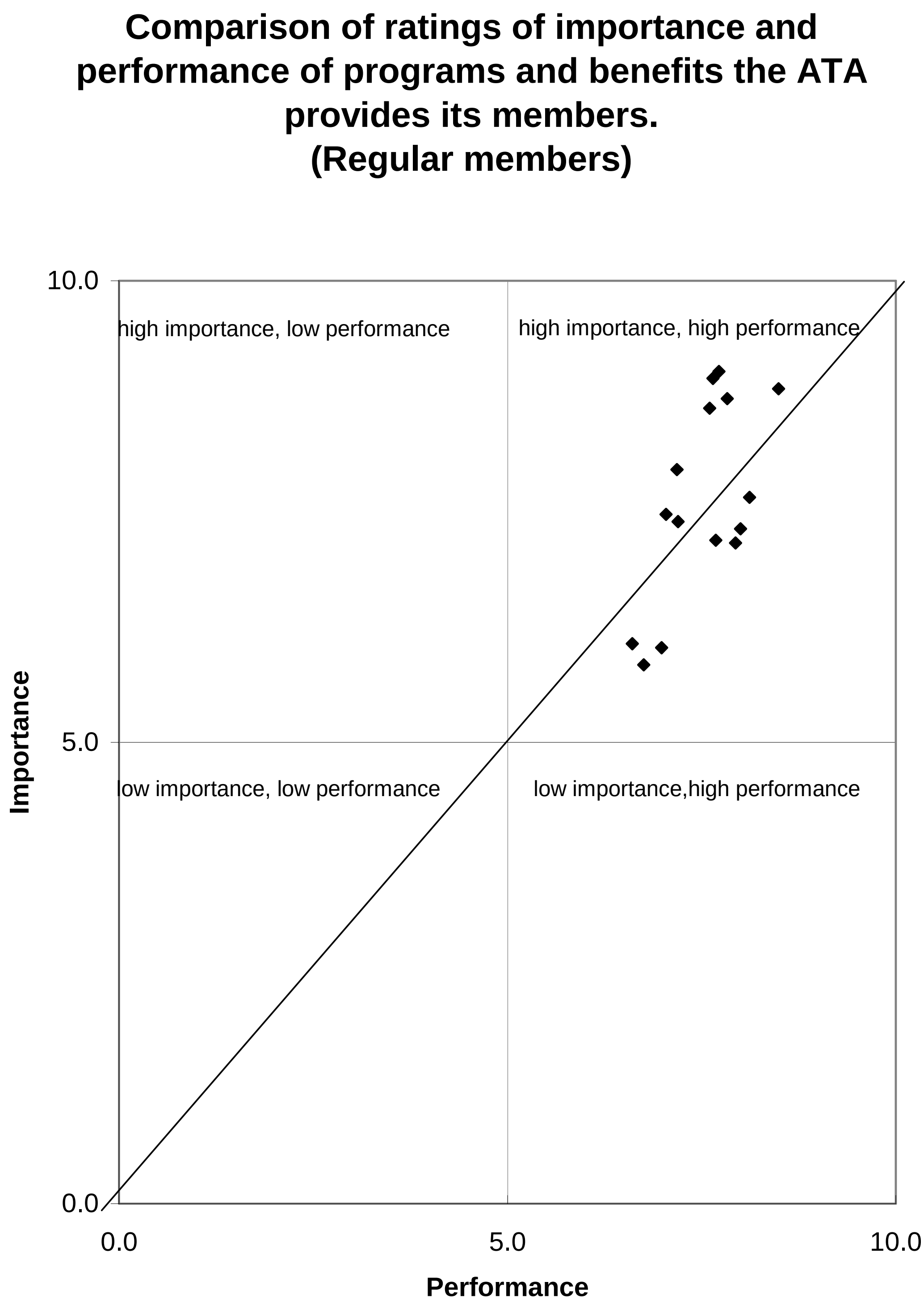


(**Graph shows both scales from 0 to 10; a close-up graph follows.)**

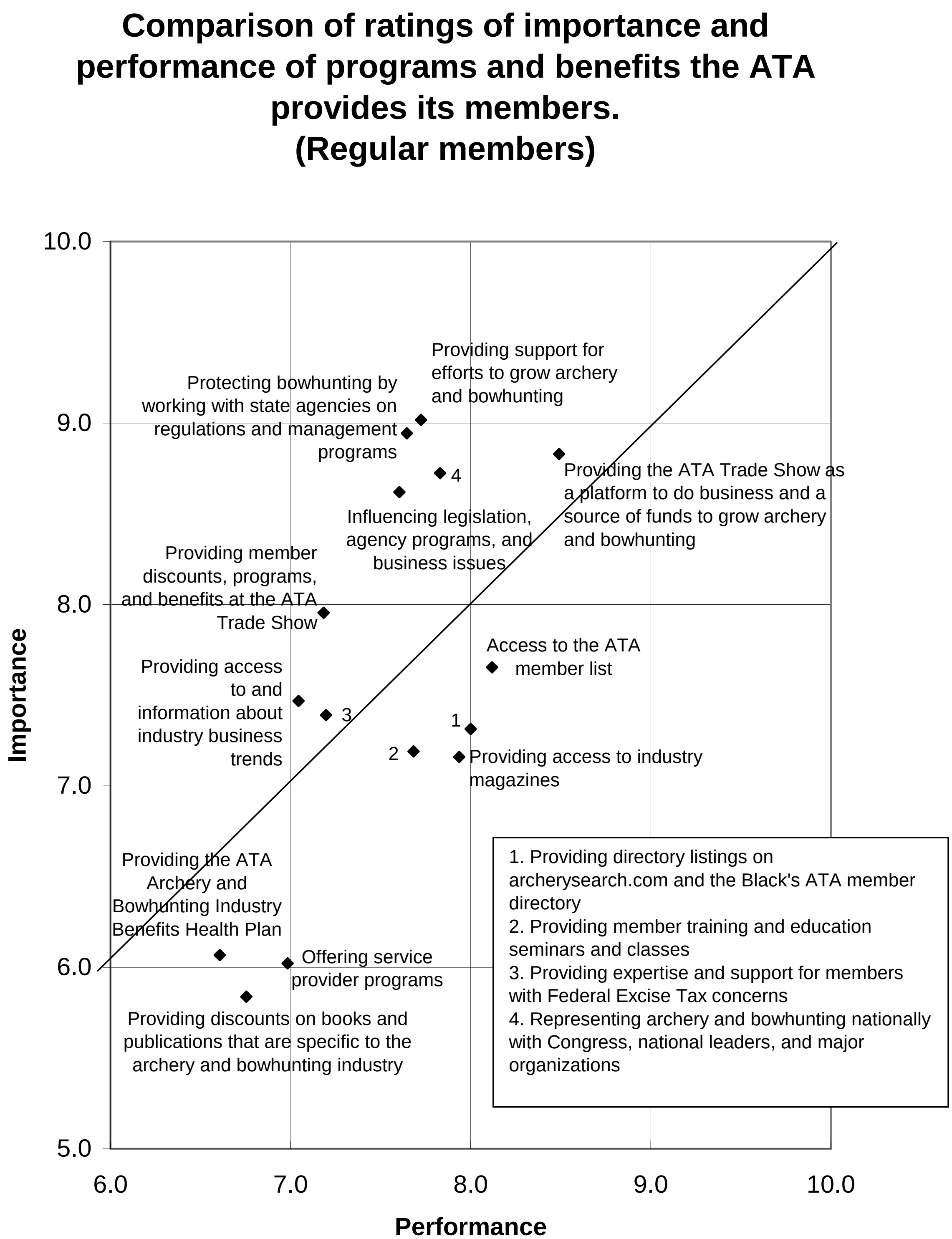
Comparison of ratings of importance and performance of programs and benefits the ATA provides its members. (Retail members)



(Shows only portions of both scales.)



(Graph shows both scales from 0 to 10; a close-up graph follows.)



(Shows only portions of both scales.)

PROGRAMS AND BENEFITS AS INCENTIVES FOR RENEWING MEMBERSHIPS

- Previously, this report discussed 12 potential programs/benefits (retail members were asked only about 9 of the 12, regular members were asked about 11 of the 12). Recall that for each program/benefit, the survey asked respondents if it would make them more likely to renew their membership. (Note that all these graphs are shown in the section of this report titled, "Motivations for ATA Membership and Reasons for Not Renewing Membership in the ATA." The results are discussed here simply for the reader's convenience, as the questions pertain to this section of the report.)
  - Among retail members, six of the nine potential programs/benefits are closely grouped, all with more than 80% saying the potential program/benefit would make them more likely to renew their membership, listed below.
    - Increased efforts to work with state/local authorities to expand bowhunting opportunities (88%).
    - Programs to connect local dealers with school and community archery/bowhunting programs (87%).
    - A program to work with cities and counties to improve recreational archery programs and ranges (87%).
    - Increased efforts to partner with agencies to grow archery and bowhunting (85%).
    - Increased efforts to motivate agencies to spend more federal excise taxes to grow archery and bowhunting (83%).
    - Working with cities to eliminate shooting ordinances and expand shooting opportunities (83%).
  - Among regular members, five of the eleven potential programs/benefits have more than 70% saying the potential program/benefit would make them more likely to renew their membership, listed below.
    - Increased efforts to work with state/local authorities to expand bowhunting opportunities (80%).
    - Increased efforts to partner with agencies to grow archery and bowhunting (79%).
    - Working with cities and counties to improve recreational archery programs and ranges (77%).

  - o Increased efforts to motivate state agencies to spend more federal excise tax funds on growing archery and bowhunting (75%).
  - o Programs to connect local dealers with school and community archery and bowhunting programs (74%).

- ➢ After the series of questions about various programs/benefits that would motivate respondents to renew their memberships, they were asked in an open-ended question if there are any other programs or member benefits that they would like to see the ATA provide its members. Overwhelming majorities of retail, regular, and lapsed members indicate that there are no other programs or benefits that they would like to see the ATA provide; otherwise, various things were said by small percentages, with no one item being mentioned by markedly higher percentages than other items.
  - This graph is shown in the section of this report titled, "Motivations for ATA Membership and Reasons for Not Renewing Membership in the ATA."

SATISFACTION AND DISSATISFACTION WITH THE ATA AND RATINGS OF ITS PERFORMANCE

- The overwhelming majority of retail (87%) and regular (68%) members are satisfied—mostly *very* satisfied—with the activities of the ATA since its transition from AMO 5 years ago (only 2% of retail members and 10% of regular members are dissatisfied).
  - Those who were satisfied most commonly gave as their reasons for being satisfied the following: that Trade Show experiences have been good, that the ATA supports its members, that the ATA is doing a good job in general, and that the ATA is doing a good job promoting archery.
  - Those who were dissatisfied most commonly said that their dissatisfaction was because the perception that the ATA is not managed well, that it does not properly support members, or that they do not like the way the Trade Show is managed.

- Satisfaction with the benefits provided by the ATA is also high: 71% of retail members and 56% of regular members are satisfied with the benefits provided by the ATA in the past 5 years. Because many respondents give neutral answers, only 2% of retail members and 5% of regular members are dissatisfied.
  - The reasons for satisfaction with the benefits were most commonly general satisfaction with the ATA's actions and its benefits, they like the support they received from the ATA, the Trade Show itself, and specifically the discounts at the Trade Show.
  - Those who were dissatisfied most commonly said that their dissatisfaction was because they feel the benefits are too limited or the cost (note the low sample sizes on this question).

- The survey asked if the respondent's company had worked with the ATA to address any problems/concerns (only 2% of retail members and 10% of regular members had worked directly with the ATA on a problem/concern), then asked respondents whether they were satisfied or dissatisfied with the assistance provided by the ATA: the majority of retail members (70%) and regular members (53%) whose companies had worked with the ATA on problems/concerns were satisfied with the ATA's assistance, but dissatisfaction was substantial among regular members (47% were dissatisfied). Note that the sample sizes for the follow-up satisfaction question were low (10 retail members, 17 regular members). Typical problems/concerns included the excise tax on equipment and educational opportunities.

- These graphs are shown in the section of this report titled, “Issues Facing the Archery Industry, Bowhunting, and the ATA.”

➢ Ratings of the ATA as an association for the archery and bowhunting industry are highly positive: 90% of retail members and 78% of regular members give a rating of excellent or good; only 1% of retail members and 3% of regular members give a poor rating. In another question, respondents were asked if the ATA is better, the same, or worse than other industry and business associations, again with positive results. The percentages saying better (48% of retail and 30% of regular members) far exceed the percentages saying worse (1% of retail and 7% of regular members).

- Those who rate the performance of the ATA as an association for the archery and bowhunting industry in the lower half of the scale (fair or poor) were asked to give their reasoning for their rating. Retail members most commonly say that they see no benefit and that there is room for improvement. Regular members most commonly blame organizational politics, that they see little benefit, and the Trade Show itself as prompting the low rating.
- The survey also had respondents compare the ATA with itself in its previous incarnation as the Archery Manufacturers and Merchants Organization (AMO) 5 years ago. The percentages saying that the ATA is better than AMO (51% of retail and 42% of regular members) exceed the percentages saying either about the same (19% and 22%, respectively) or worse (1% and 4%, respectively). Note that just under a third did not know enough to say.

➢ Only 7% of retail and 17% of regular members say that the current ATA membership dues are too high. Therefore, it does not appear that the cost of dues (or to be more exact, too high a cost) is an important dissatisfaction.

- This graph is shown in the section of this report titled, “ATA Dues.”

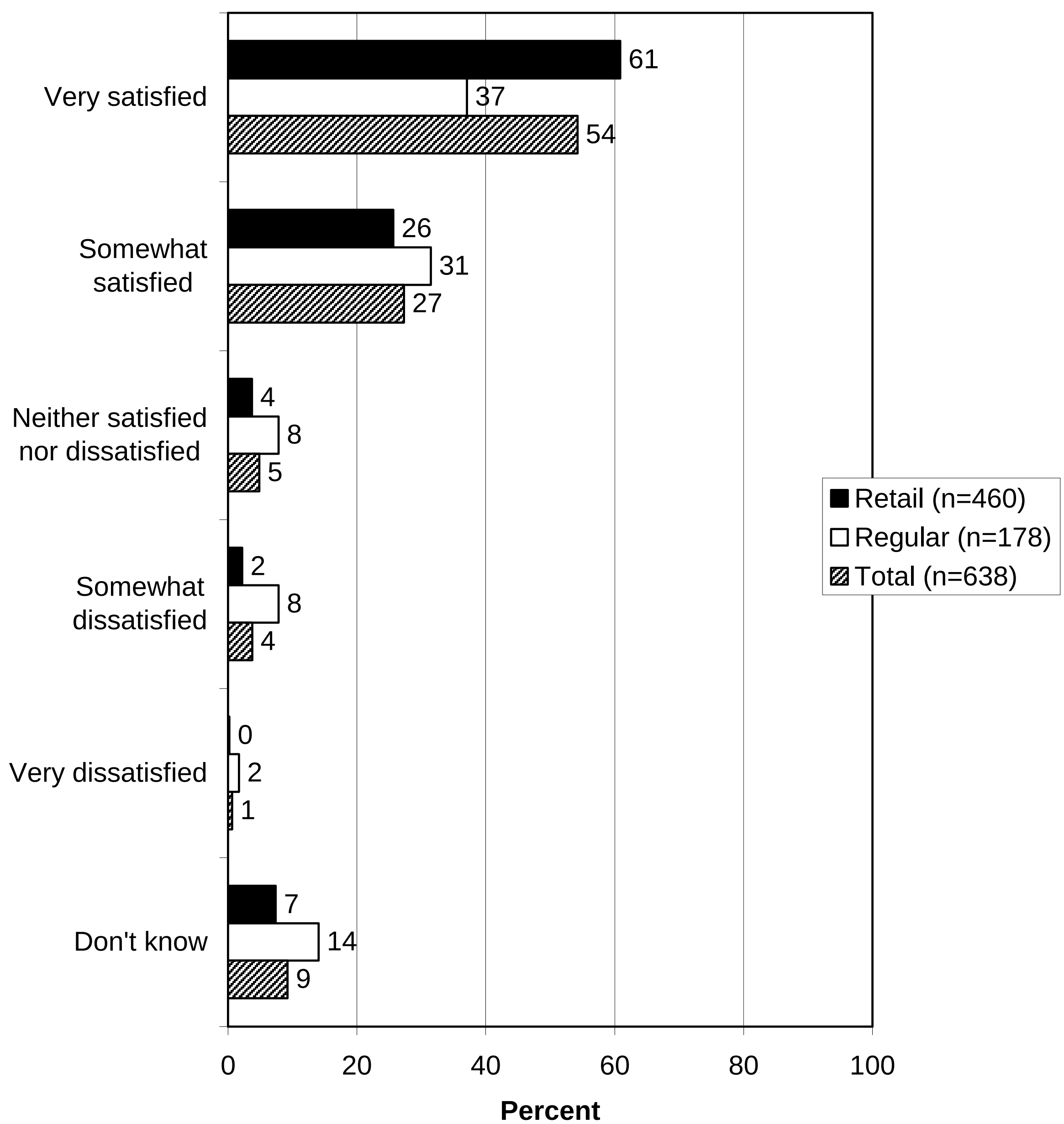
- The survey asked respondents to indicate agreement or disagreement with 9 statements (each group was asked about 8 of the 9). These statements, while not directly about satisfaction, give an indirect examination of how satisfied members are based on the statements. All of the statements are positive about the ATA and/or its activities; therefore, agreement suggests satisfaction, and disagreement suggests dissatisfaction.
  - Among retail members, agreement is high for all statements (at 80% or more), indicating high satisfaction. At the top of the ranking are five grouped together (all with 87% or more who agree), listed below.
    - "The ATA effectively represents the archery and bowhunting industry." (95%)
    - "The ATA effectively serves the interests of its members." (94%)
    - "The ATA effectively influences the archery and bowhunting industry." (90%)
    - "The ATA offers service provider benefits that are valuable." (89%)
    - "The ATA staff leadership effectively represents the archery and bowhunting industry." (87%)
  - Among regular members, agreement is high for most statements (at 80% or more for 5 of the 8 statements), indicating high satisfaction for the most part. One is by itself at the top of the ranking (agreement at 88%), followed by four, all with agreement at 81% or 82%:
    - "The ATA effectively represents the archery and bowhunting industry." (88%)
    - "The ATA staff leadership effectively represents the archery and bowhunting industry." (82%)
    - "The ATA effectively influences the archery and bowhunting industry." (82%)
    - "The ATA effectively serves the interests of its members." (81%)
    - "The ATA offers service provider benefits that are valuable." (81%)

- Another question asked respondents to indicate whether they agree or disagree that the ATA can improve the value of membership in its association. Agreement would suggest that the ATA could do more, although agreement does not necessarily equate with dissatisfaction. Nonetheless, the fact that agreement was so high on this question (92% of retail members and 94% of regular members) suggests that members are not wholly satisfied with their membership—or at the very least feel that there is room for improvement.

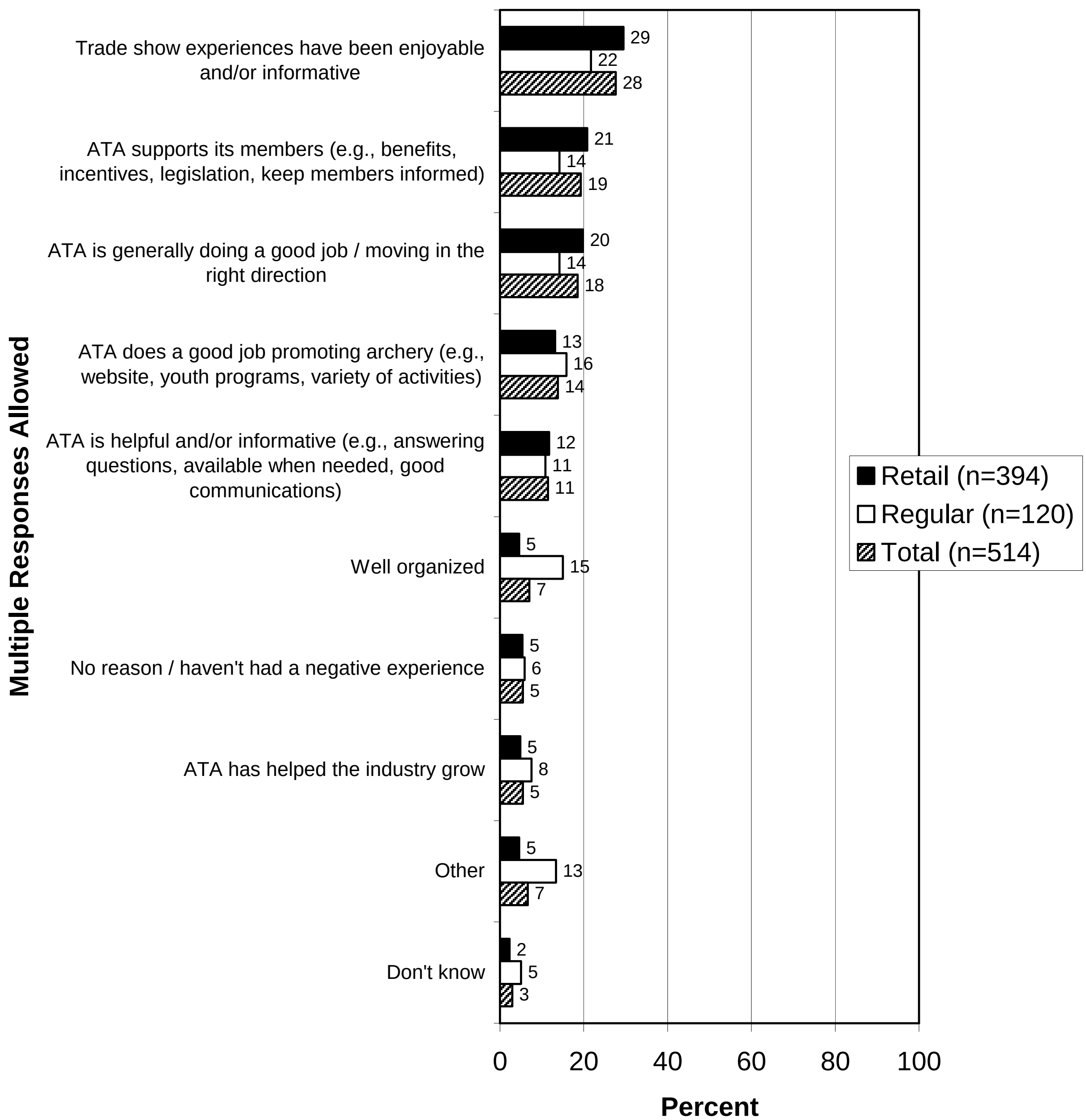
- When asked what they like most about being an ATA member, retail members most commonly said the Trade Show (by far the top answer), information and publications, and the benefits of the ATA and support provided by the ATA. Regular members said the Trade Show, the ability to network through the ATA (and at the show), and information and publications.
  - This graph is shown in the section of this report titled, "Motivations for ATA Membership and Reasons for Not Renewing Membership in the ATA." The results are discussed here for the reader's convenience, as they pertain to satisfaction.

- When asked what they like the least about being an ATA member, retail members most commonly say that there is nothing they dislike; otherwise, the location of the show and the cost of membership are most commonly named. Regular members also most commonly say that there is nothing they dislike; otherwise, the most common answer is cost. This study did not address whether these dissatisfactions would be strong enough reasons to cause respondents to *not* renew their memberships, but they are issues about which the ATA should be aware.
  - This graph is shown in the section of this report titled, "Motivations for ATA Membership and Reasons for Not Renewing Membership in the ATA." The results are discussed here for the reader's convenience, as they pertain to dissatisfaction.

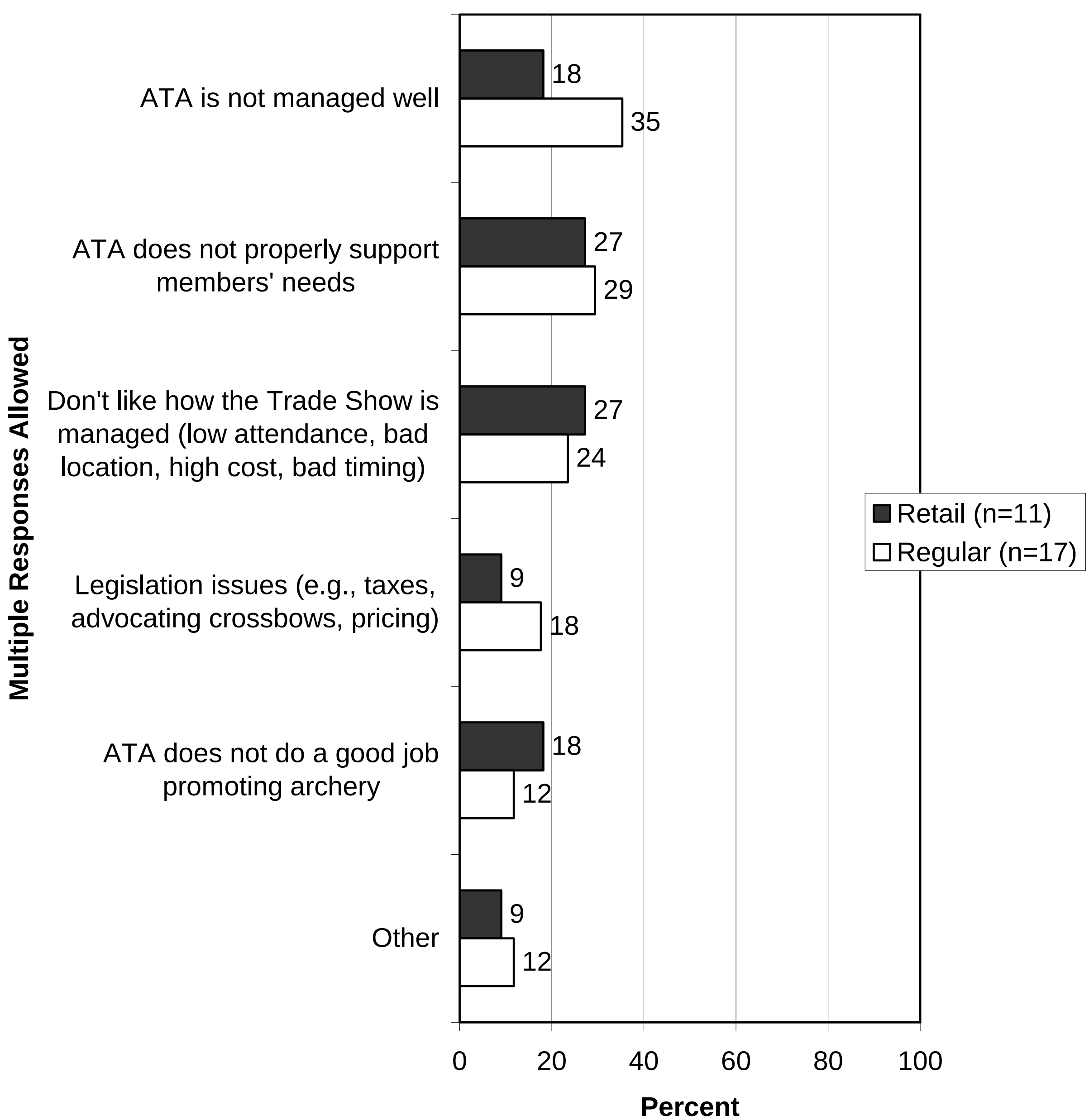
Overall, have you been satisfied or dissatisfied with the activities of the ATA since its transition from AMO 5 years ago?



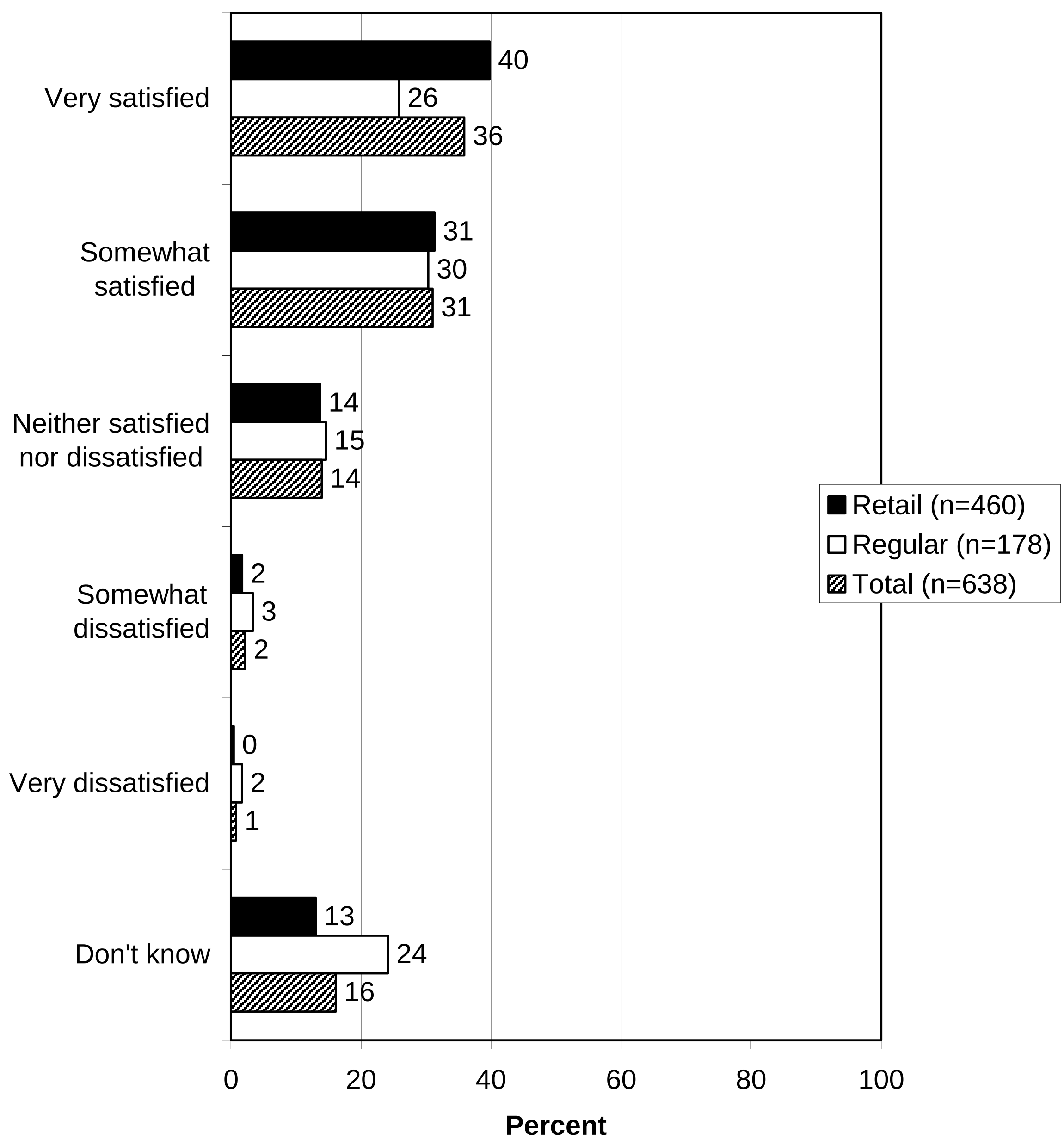
Why have you been satisfied with the activities of the ATA? (Asked of current ATA members who are satisfied with the activities of the ATA since its transition from AMO 5 years ago.)



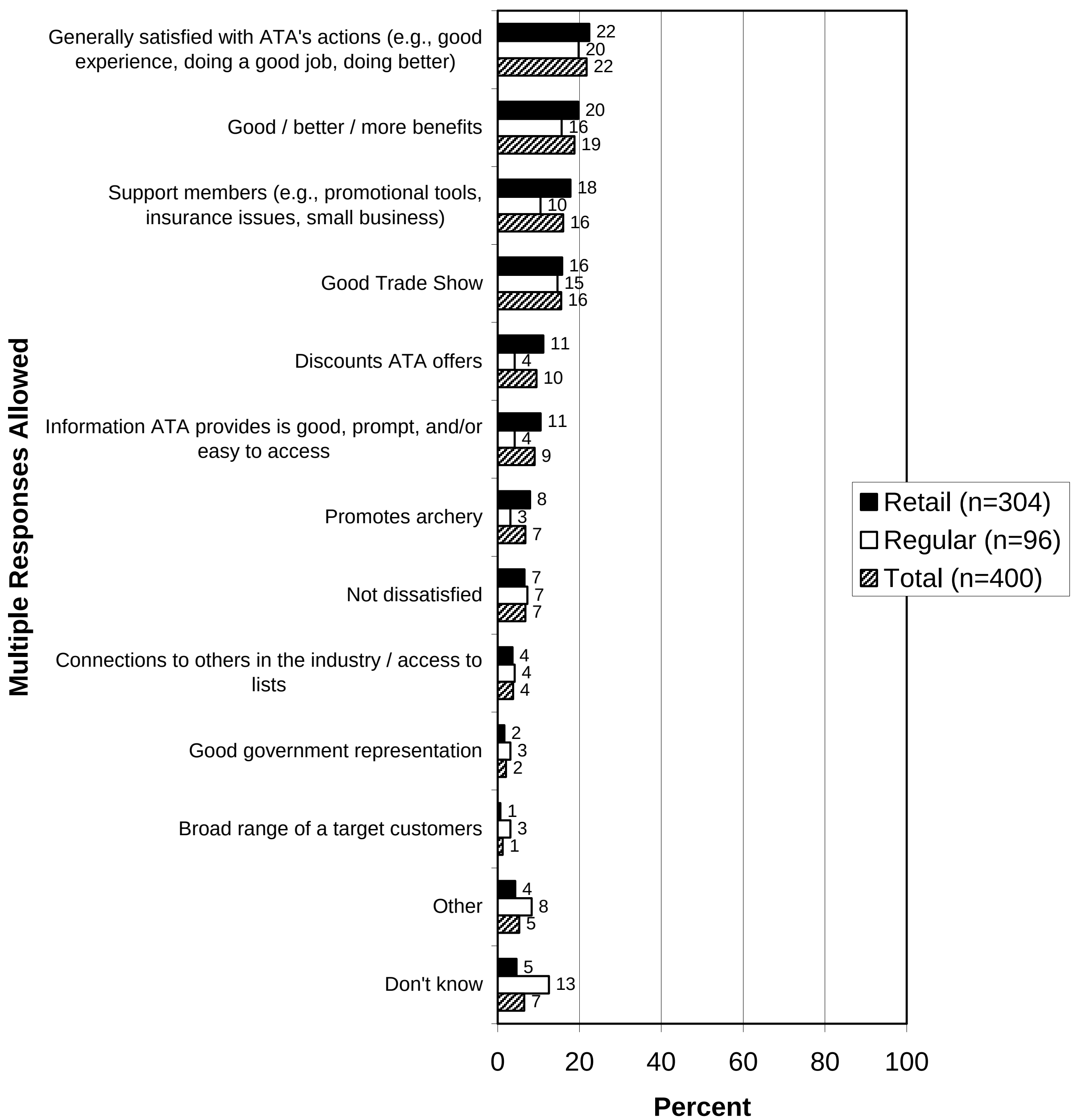
Why have you been dissatisfied with the activities of the ATA? (Asked of current ATA members who are dissatisfied with the activities of the ATA since its transition from AMO 5 years ago.)



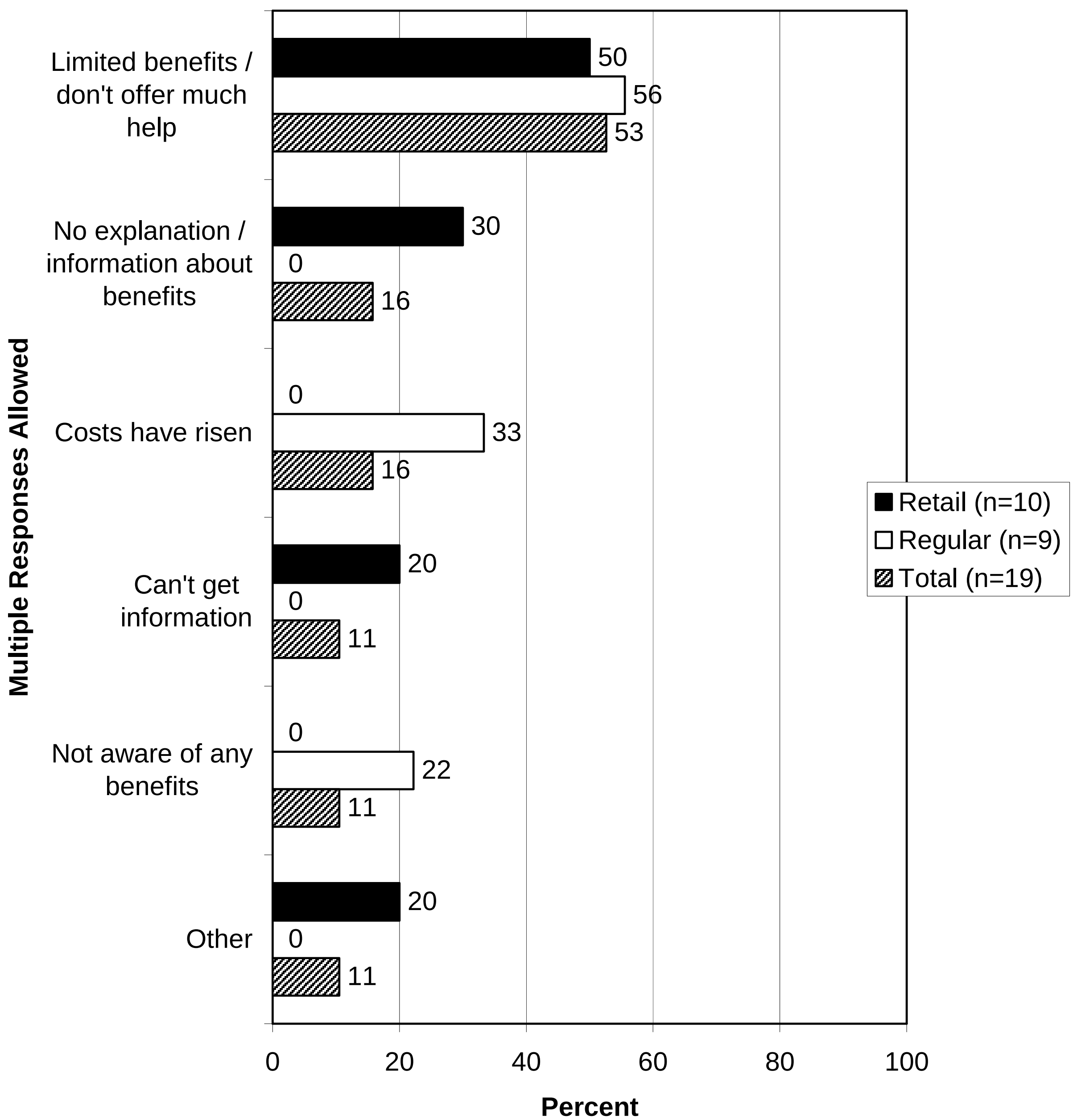
Overall, have you been satisfied or dissatisfied with the benefits of the ATA since its transition from AMO 5 years ago?

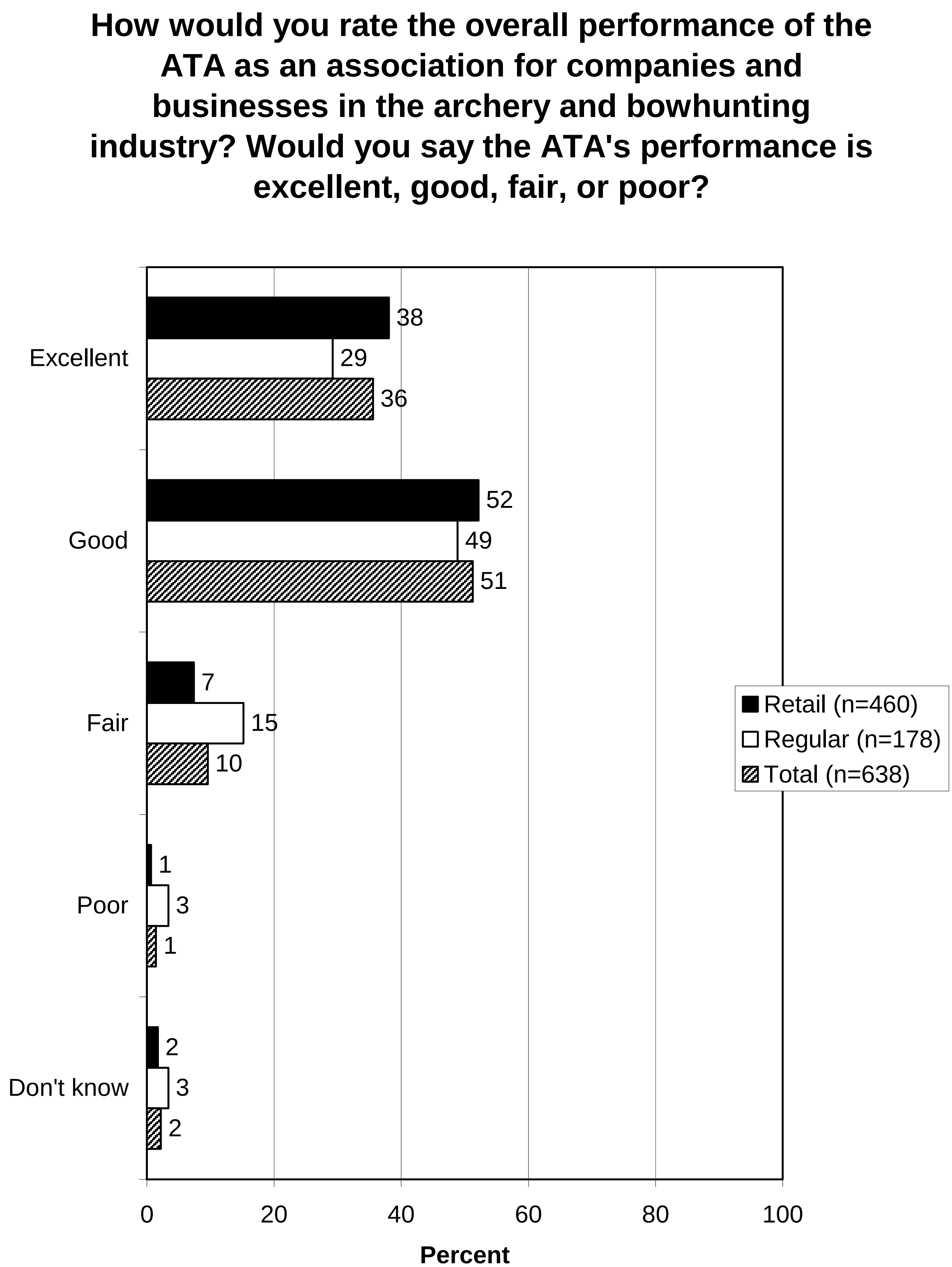


Why have you been satisfied with the benefits of the ATA? (Asked of current ATA members who are satisfied with the benefits of the ATA since its transition from AMO 5 years ago.)

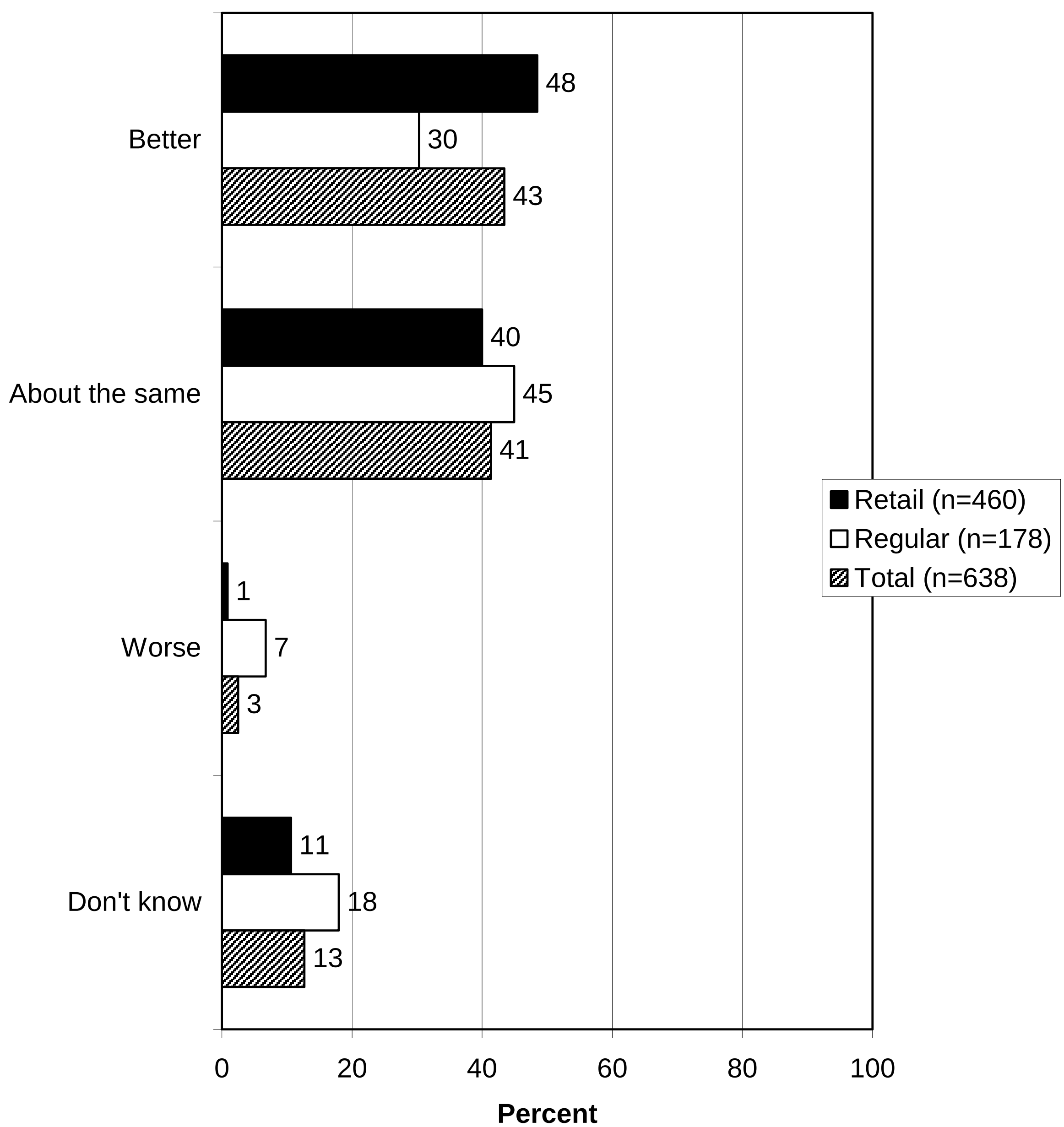


Why have you been dissatisfied with the benefits of the ATA? (Asked of current ATA members who are dissatisfied with the benefits of the ATA since its transition from AMO 5 years ago.)

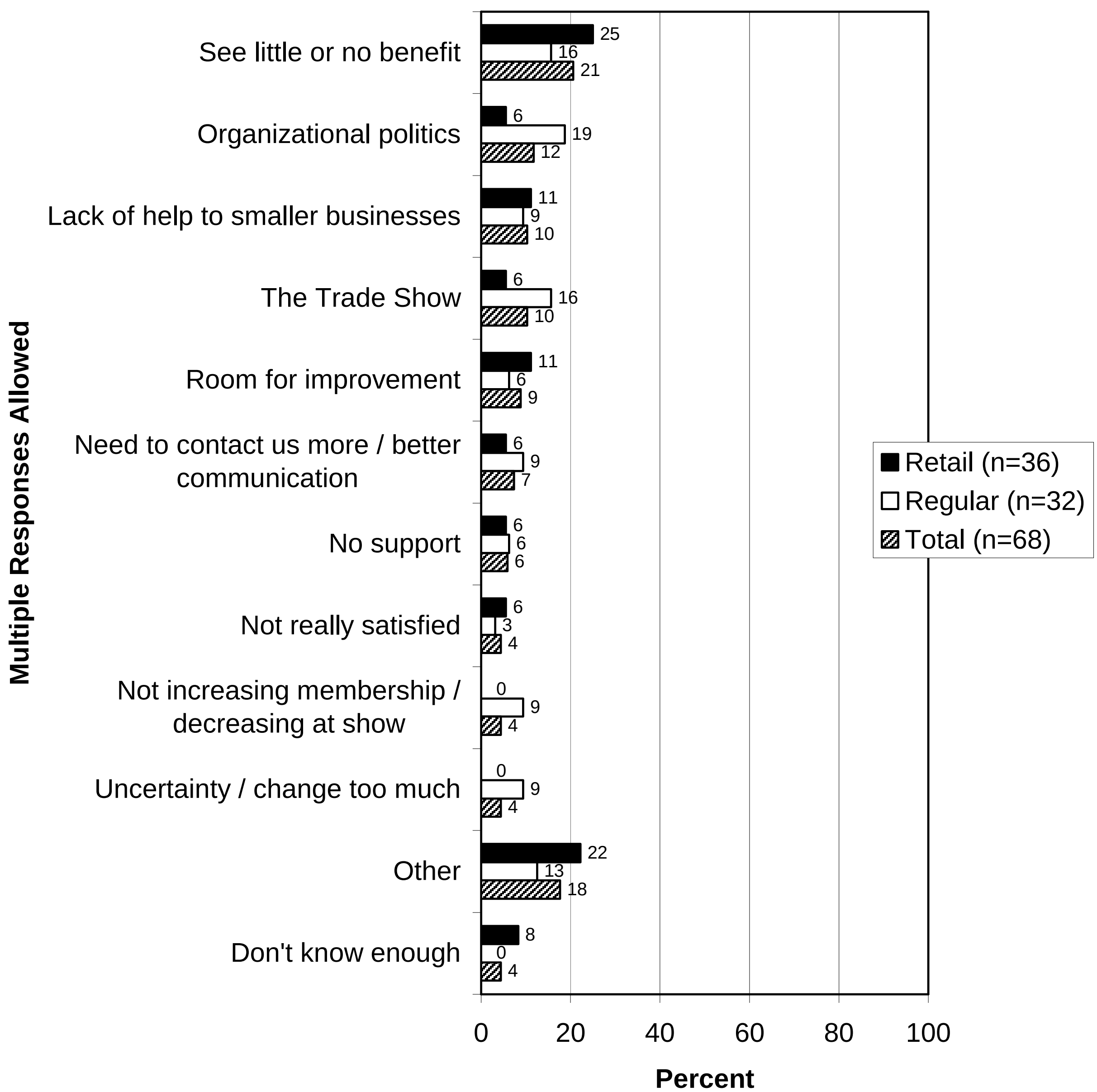



How would you rate the overall performance of the ATA as an association for companies and businesses in the archery and bowhunting industry? Would you say the ATA's performance is excellent, good, fair, or poor?
Excellent
38
29
36
Good
52
49
51
Fair
7
15
10
Poor
1
3
1
Don't know
2
3
2
0
20
40
60
80
100
Percent
Retail (n=460)
Regular (n=178)
Total (n=638)

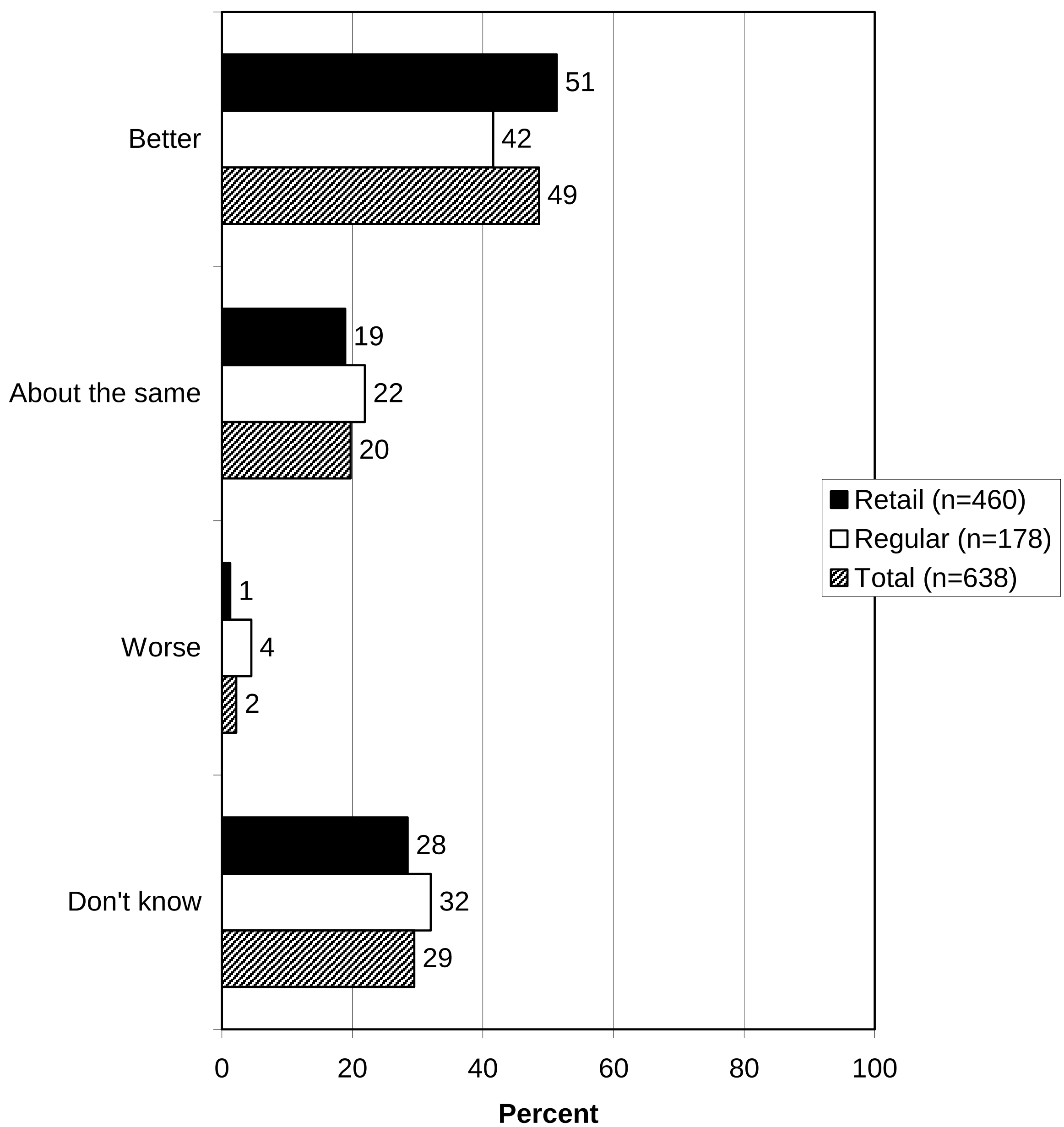
Compared to other industry or business associations, how would you rate ATA? Would you say it is better, about the same, or worse than other industry or business associations?

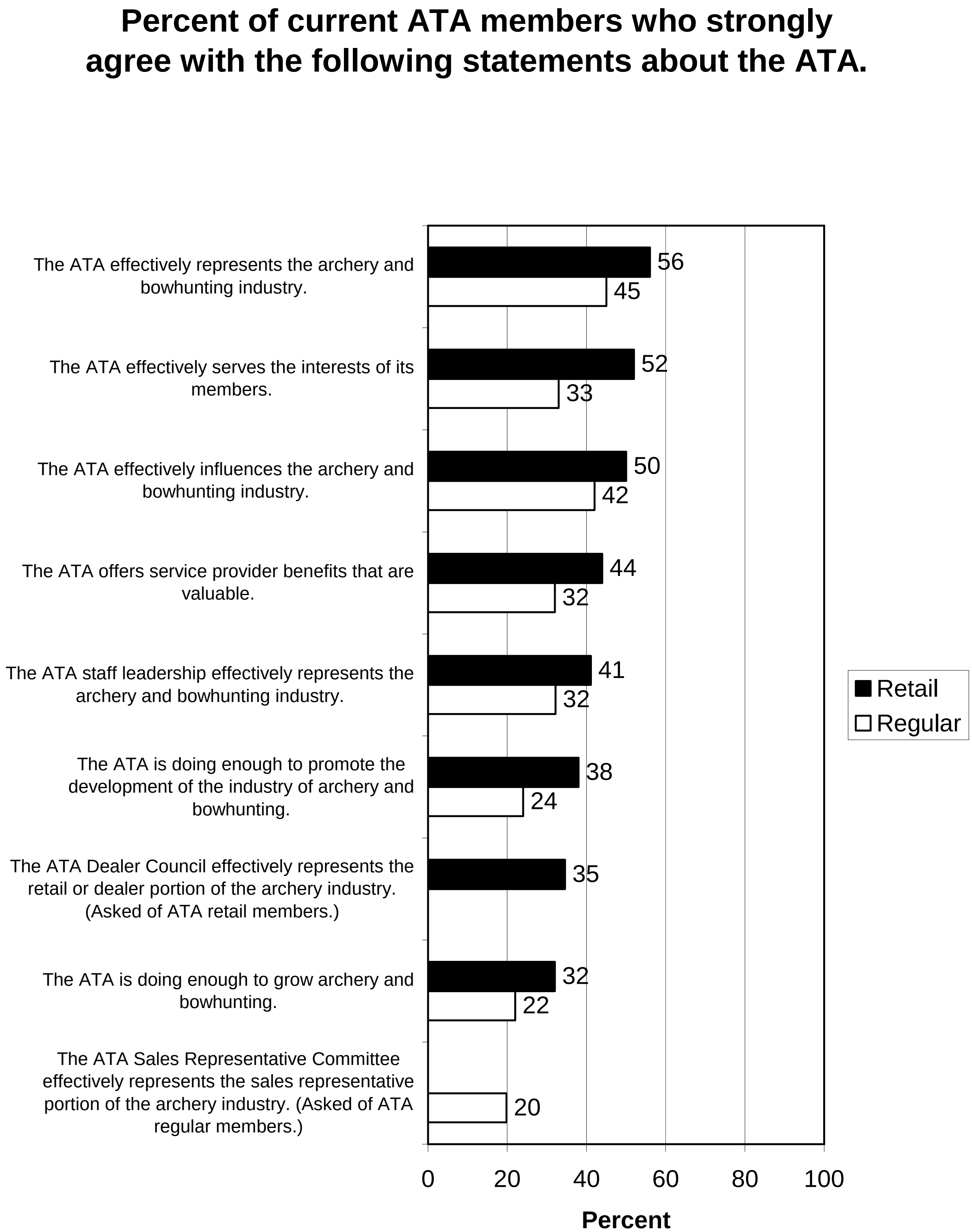


Why would you rate the ATA's performance as an association as fair or poor? (Asked of current ATA members who rated the overall performance of the ATA as an association for companies and businesses in the archery and bowhunting industry as fair or poor.)

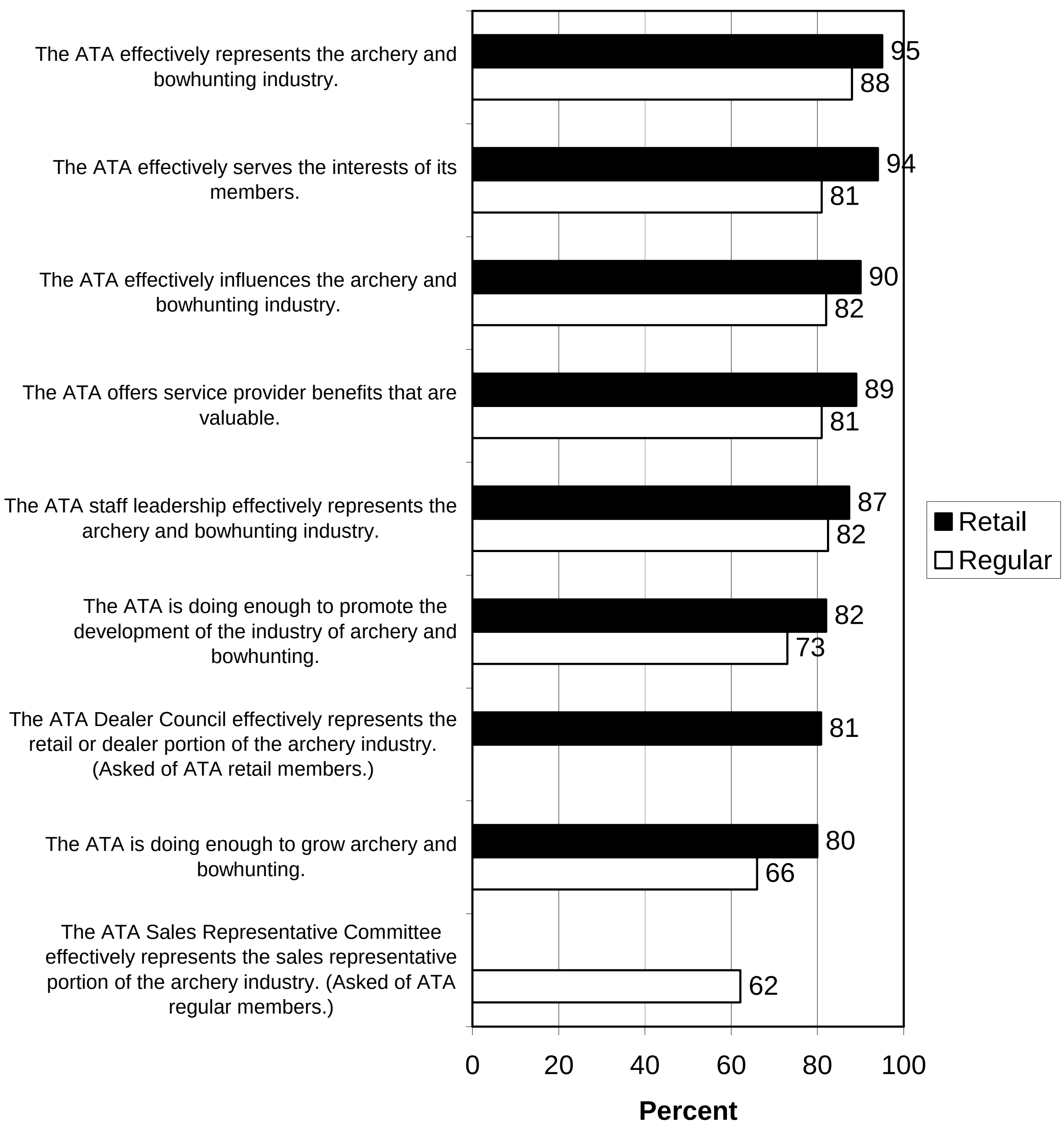


The ATA evolved from a previous association known as the Archery Manufacturers and Merchants Organization or AMO. In your opinion, is the ATA better, about the same, or worse than the AMO was as an industry or business association?

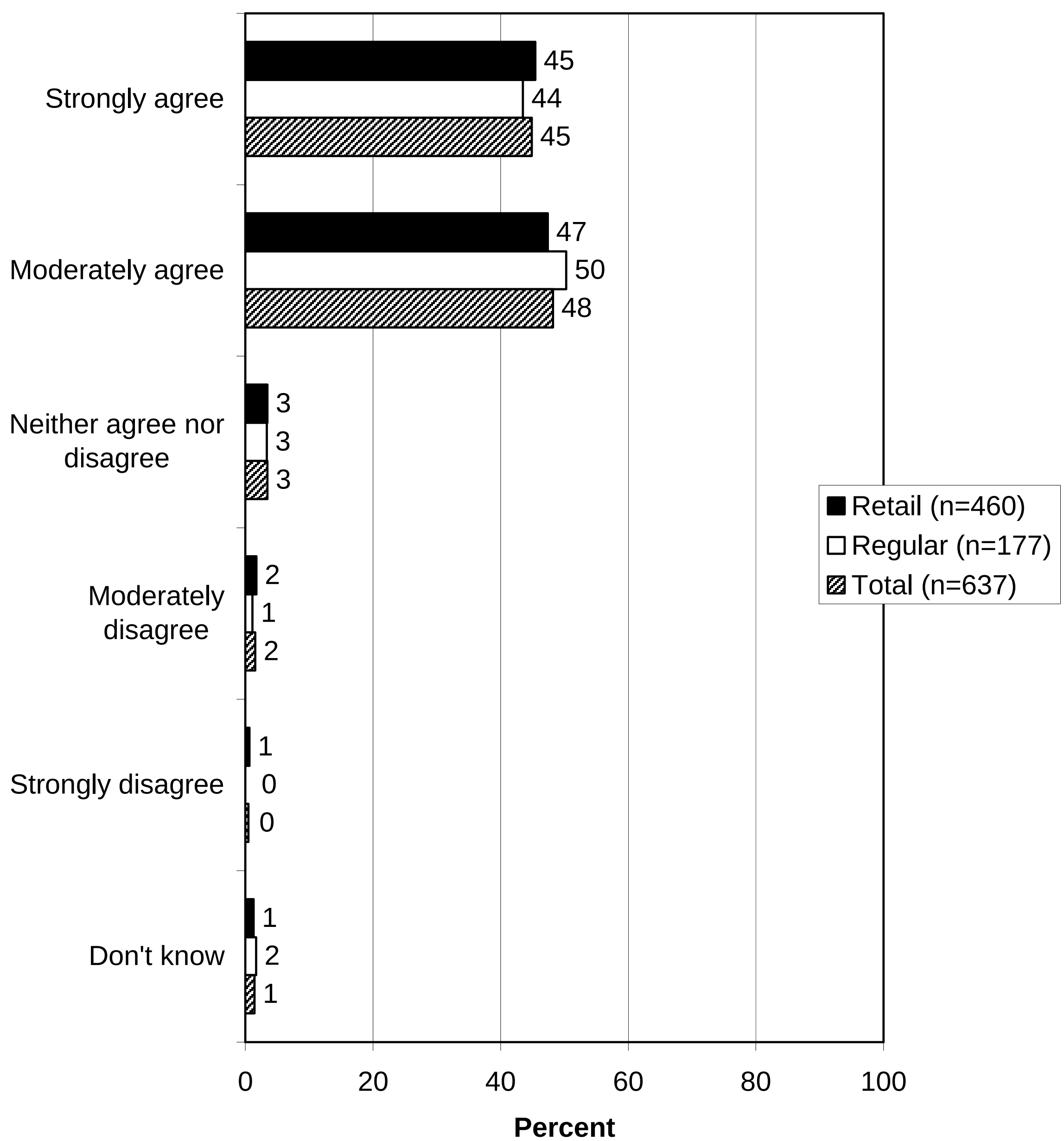



Percent of current ATA members who strongly agree with the following statements about the ATA.
The ATA effectively represents the archery and bowhunting industry.
56
45
The ATA effectively serves the interests of its members.
52
33
The ATA effectively influences the archery and bowhunting industry.
50
42
The ATA offers service provider benefits that are valuable.
44
32
The ATA staff leadership effectively represents the archery and bowhunting industry.
41
32
The ATA is doing enough to promote the development of the industry of archery and bowhunting.
38
24
The ATA Dealer Council effectively represents the retail or dealer portion of the archery industry. (Asked of ATA retail members.)
35
The ATA is doing enough to grow archery and bowhunting.
32
22
The ATA Sales Representative Committee effectively represents the sales representative portion of the archery industry. (Asked of ATA regular members.)
20
0
20
40
60
80
100
Percent
Retail
Regular

Percent of current ATA members who agree with the following statements about the ATA.



Do you agree or disagree that the ATA can improve the value of membership in its association?



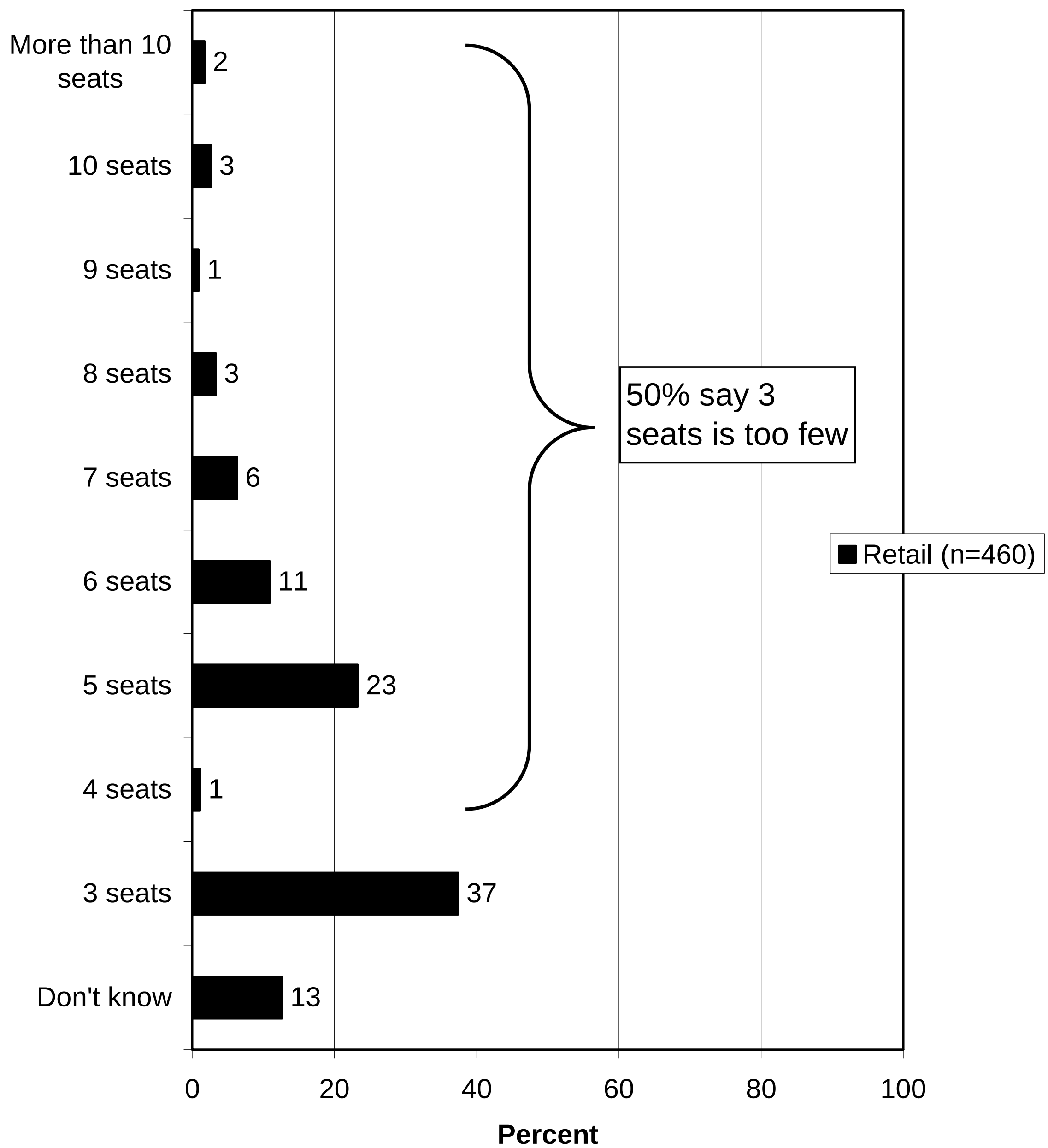
MISCELLANEOUS: ATA STRUCTURE, PROCEDURES, AND RULES

- Retail members were informed that the ATA Dealer Council currently has three voting seats on the ATA Board of Directors, then they were asked about how many voting seats the Dealer Council should have to effectively represent the dealers on the ATA Board of Directors. Most commonly, retail members think three seats are enough (37% say that three is the right number); a substantial percentage want five seats (23%) or six seats (11%). Note that half want more than three seats (50% say that three seats is too few).

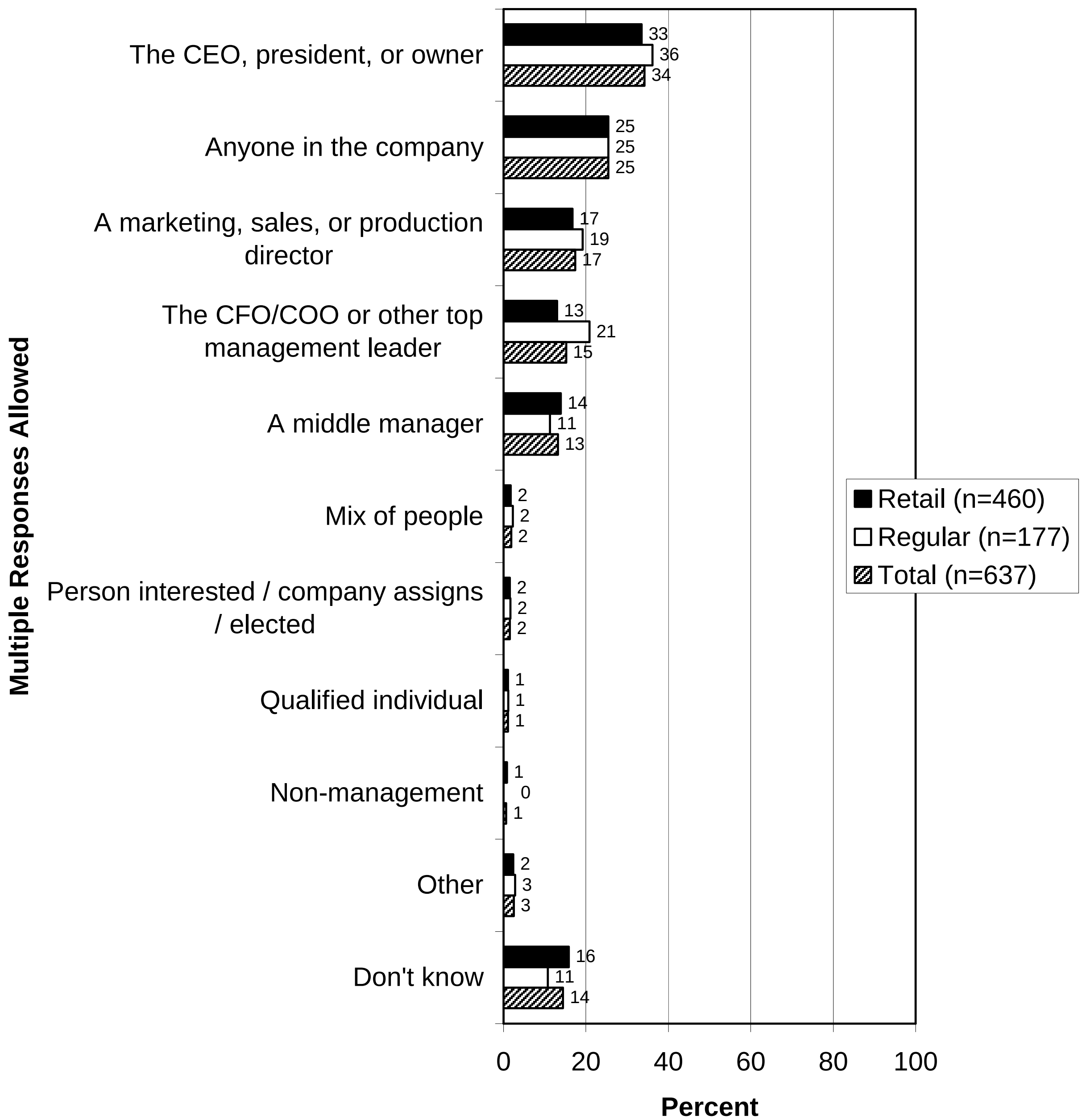
- Respondents were asked who (i.e., the position within the company) they thought should represent companies elected to the ATA Board of Directors. Retail and regular members most commonly named the CEO, president, or owner of the company; "anyone" in the company; a marketing, sales, or production director, or the CFO or COO or other top management official.

- Regular members were informed that ATA membership dues are currently based on booth space purchased at the ATA Trade Show, then they were asked whether they agree or disagree that ATA membership dues should continue to be based on the booth space purchased at the Show. While a majority of regular members agree (54%), more than a third (36%) disagree.
    - Those who agreed most commonly did so because they perceive it as being an equitable and fair way to do it.
    - Those who disagreed most commonly did so because they say it is too expensive or that dues should be the same for all.

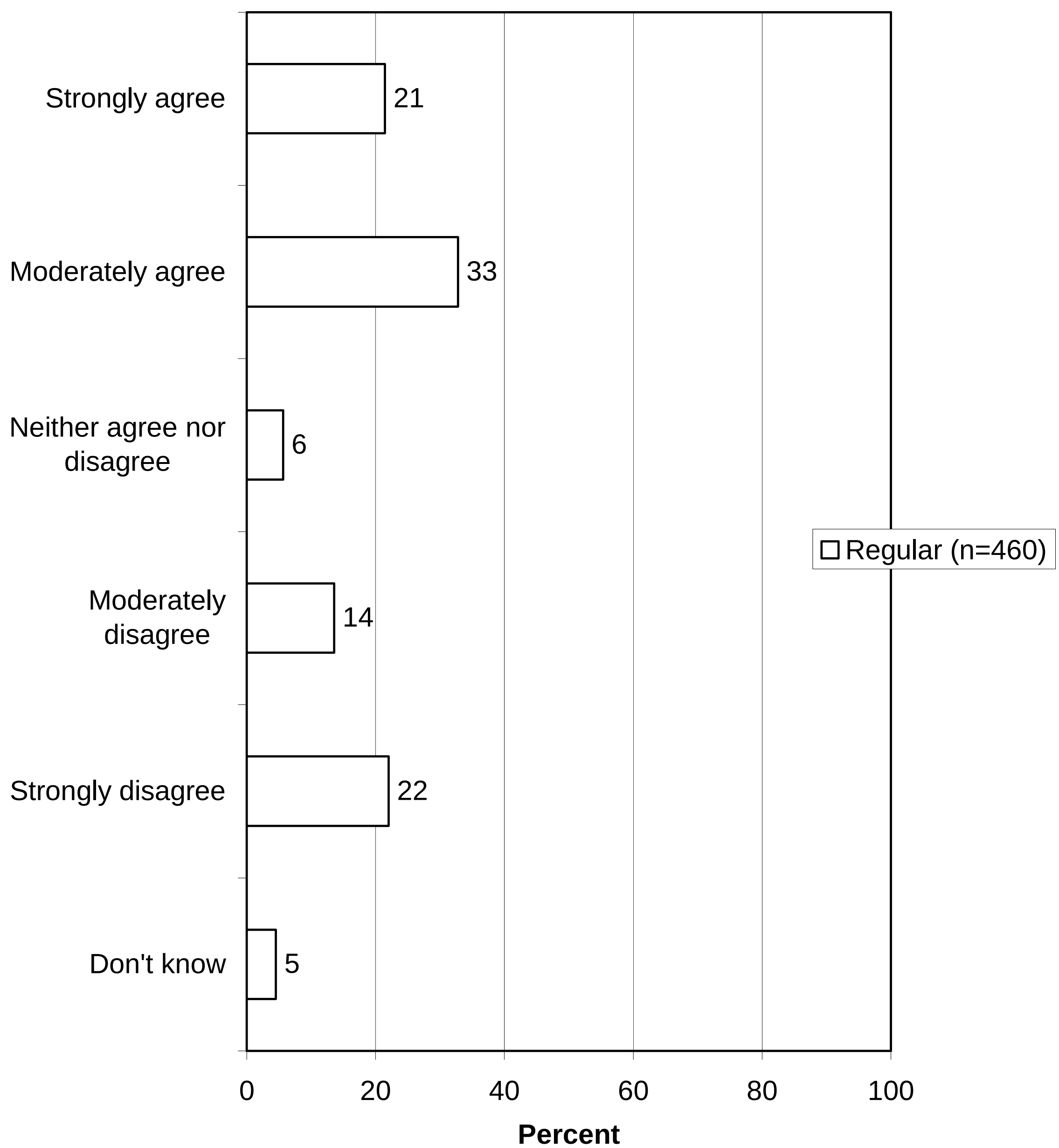
How many voting seats do you think the ATA Dealer Council should have on the ATA Board of Directors to effectively represent the dealers? (Among all; those who said in the previous question that 3 voting seats is about right are shown in the "3 seats" response.)



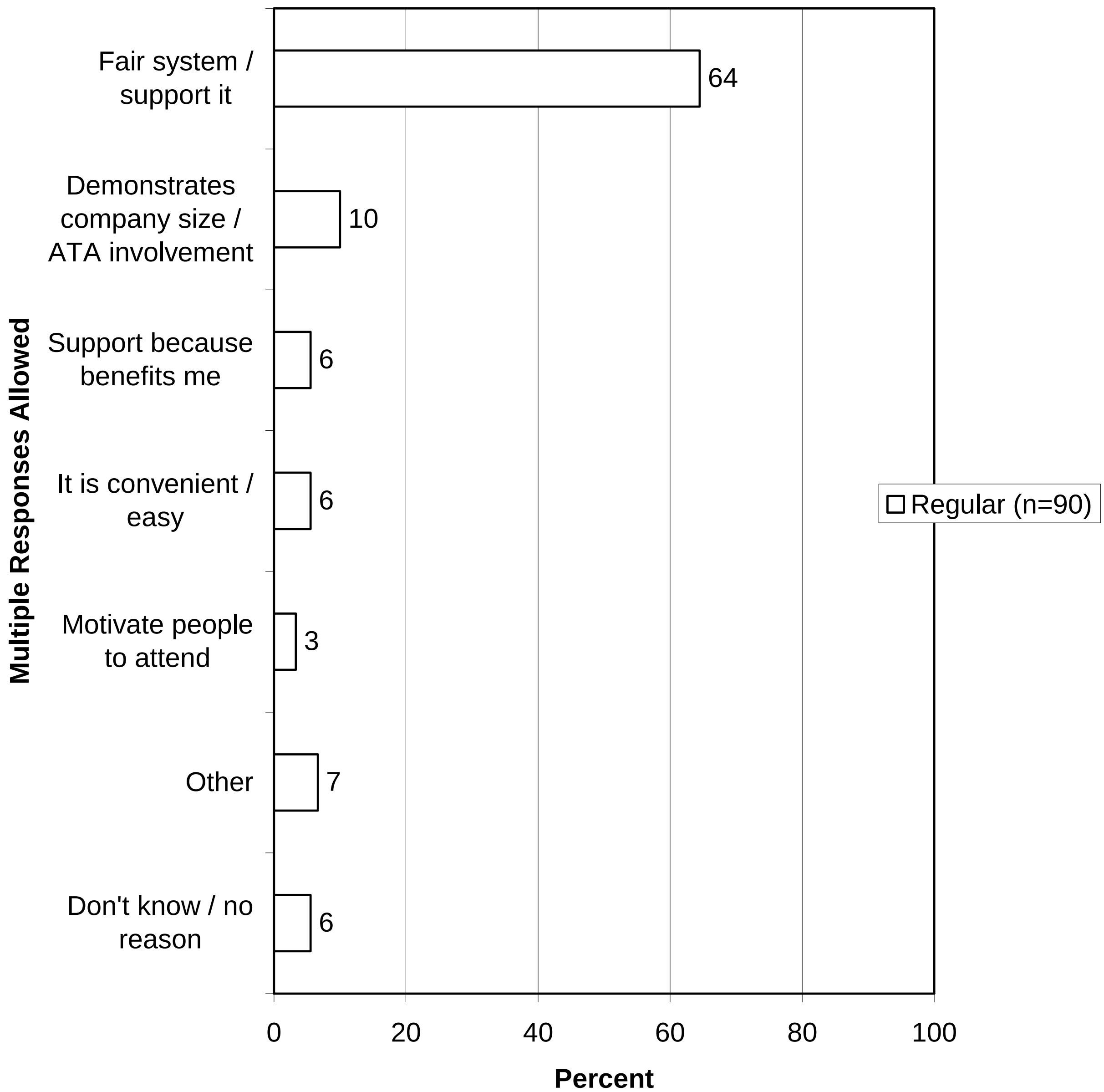
In your opinion, who should represent the companies elected to the ATA Board of Directors?



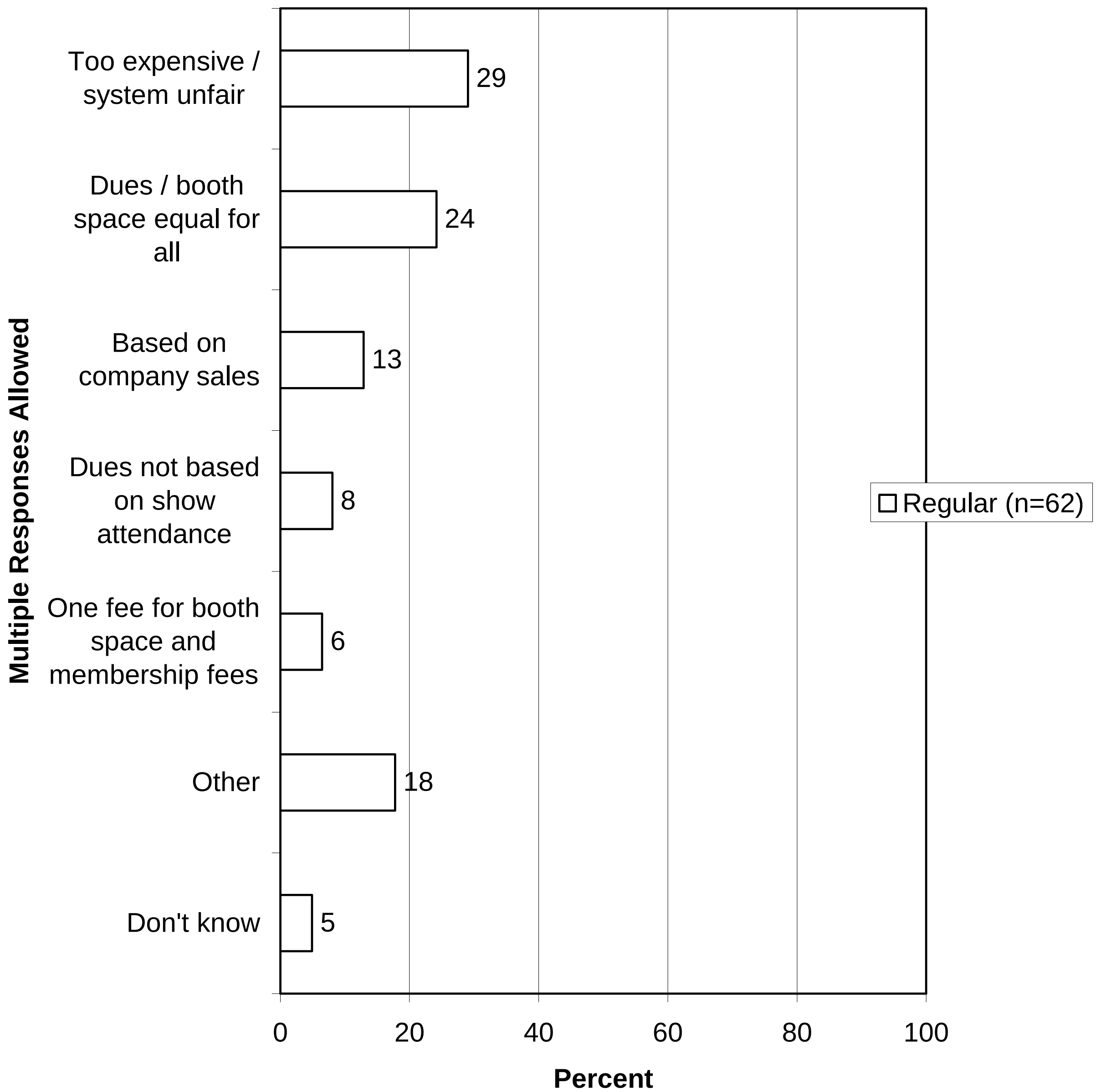
Currently, ATA membership dues are based on booth space purchased at the ATA Trade Show. Do you agree or disagree that ATA membership dues should continue to be based on booth space purchased at the Trade Show?



Why do you agree that ATA membership dues should continue to be based on booth space purchased at the ATA Trade Show? (Asked of current ATA regular members who agree that ATA membership dues should continue to be based on booth space purchased at the Trade Show.)



Why do you disagree that ATA membership dues should continue to be based on booth space purchased at the ATA Trade Show? (Asked of current ATA regular members who disagree that ATA membership dues should continue to be based on booth space purchased at the Trade Show.)

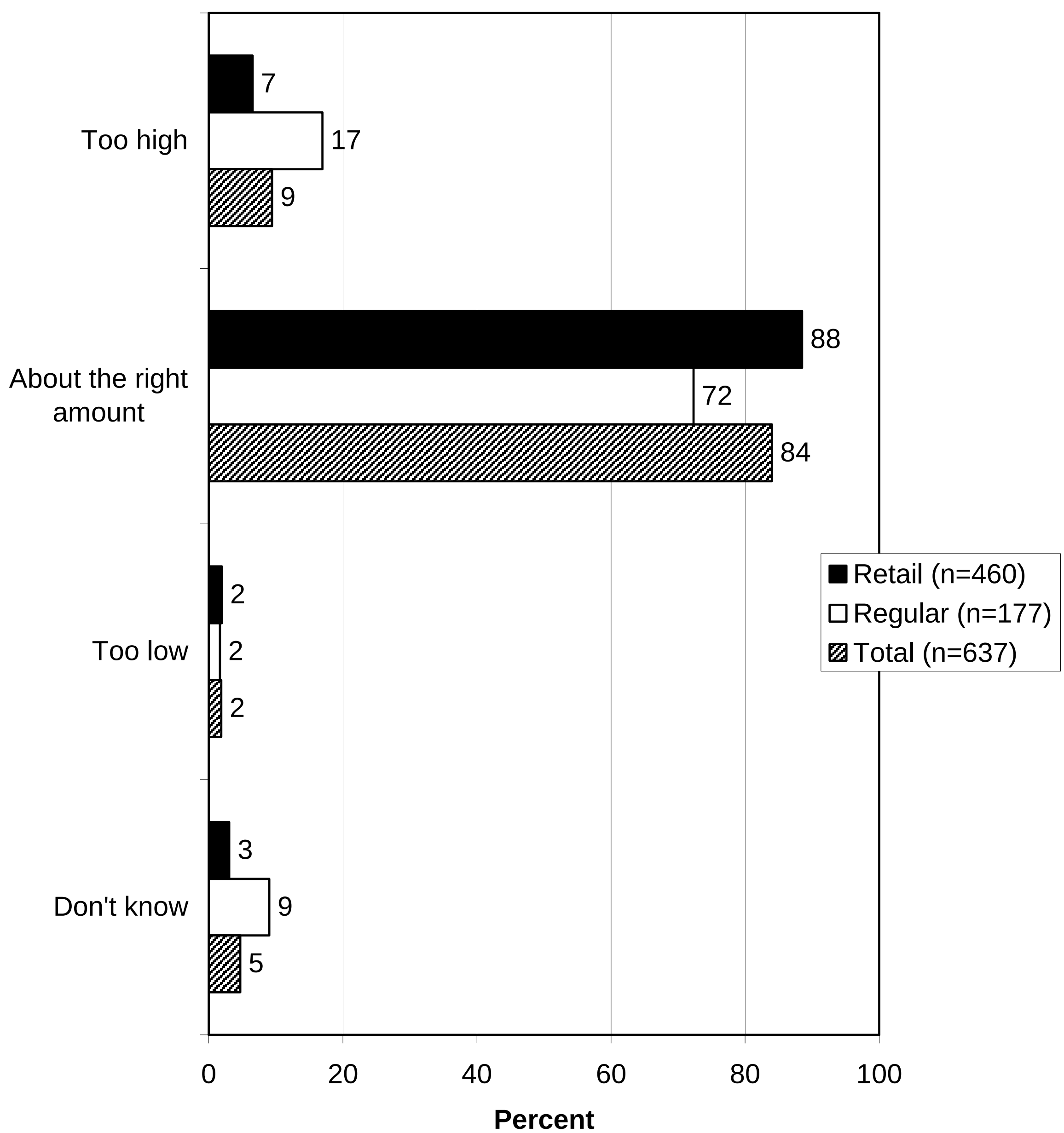


ATA DUES

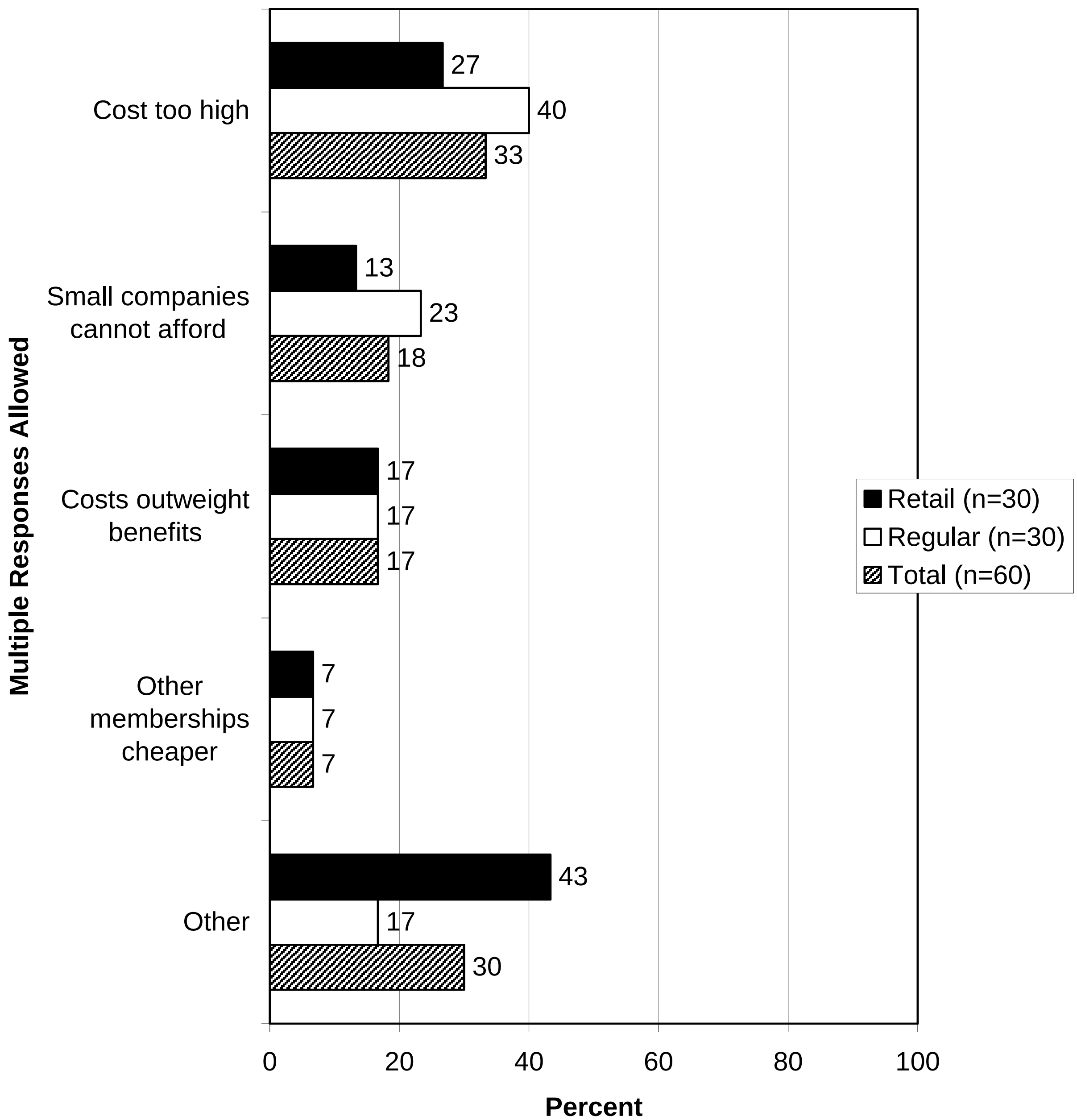
- Overwhelming majorities of respondents (88% of retail members, 72% of regular members) say that current ATA membership dues are about the right amount; only 7% of retail and 17% of regular members say that the dues are too high.
  - There are three important reasons that members think dues are too high: that small companies cannot afford them, that the costs outweigh the benefits, or that other memberships are cheaper.

- As discussed previously, regular members were informed that ATA membership dues are currently based on booth space purchased at the ATA Trade Show, then they were asked whether they agree or disagree that ATA membership dues should continue to be based on the booth space purchased at the Show. While a majority of regular members agree (54%), more than a third (36%) disagree.
  - Those who agreed most commonly did so because they perceive it as being an equitable and fair way to do it.
  - Those who disagreed most commonly did so because they say it is too expensive or that dues should be the same for all.
  - These graphs are shown in the section of this report titled, “Miscellaneous: ATA Structure, Procedures, and Rules.”

Overall, do you think the current ATA membership dues are too high, about the right amount, or too low?



Why do you think current ATA membership dues are too high? (Asked of current ATA members who think current ATA membership dues are too high.)



THE ATA TRADE SHOW

- The survey asked respondents to rate the benefits for their company of attending the ATA Trade Show, with highly positive results. Large majorities (89% of retail members and 74% of regular members) rate the benefits as excellent or good; only 1% of retail and 5% of regular members give a rating of poor.
  - Those who rated the benefits in the lower half of the scale (fair or poor) were asked for their reasons for giving their rating. Retail and regular members most commonly said that they receive little return for their efforts at the Show or the lack of good deals at the Show.

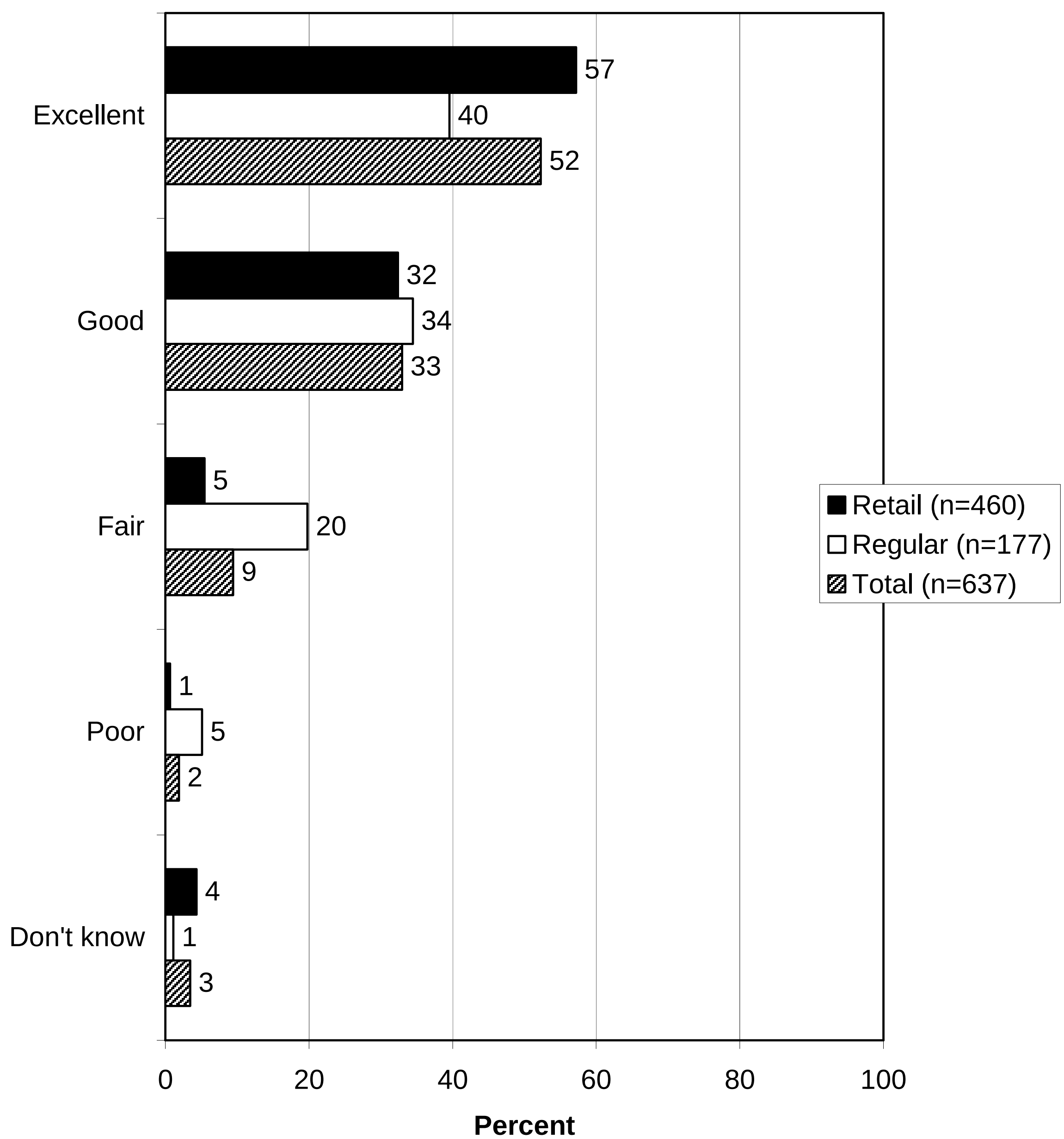
- Retail members indicated that their most important reasons for attending the show are to view archery and bowhunting products, to make business transactions, to make contacts, and for seminars and information. Regular members said their most important reasons for attending the show are to make business contacts, to advertise, for the company’s image, and to make business transactions.

- Respondents were also asked what aspects of the show they would like to see improved. For both groups, the most common answer is nothing needs to be improved; otherwise, retail members most commonly say better seminars/more in-depth programs and/or a different location, and regular members most commonly say better attendance and/or reduced costs.

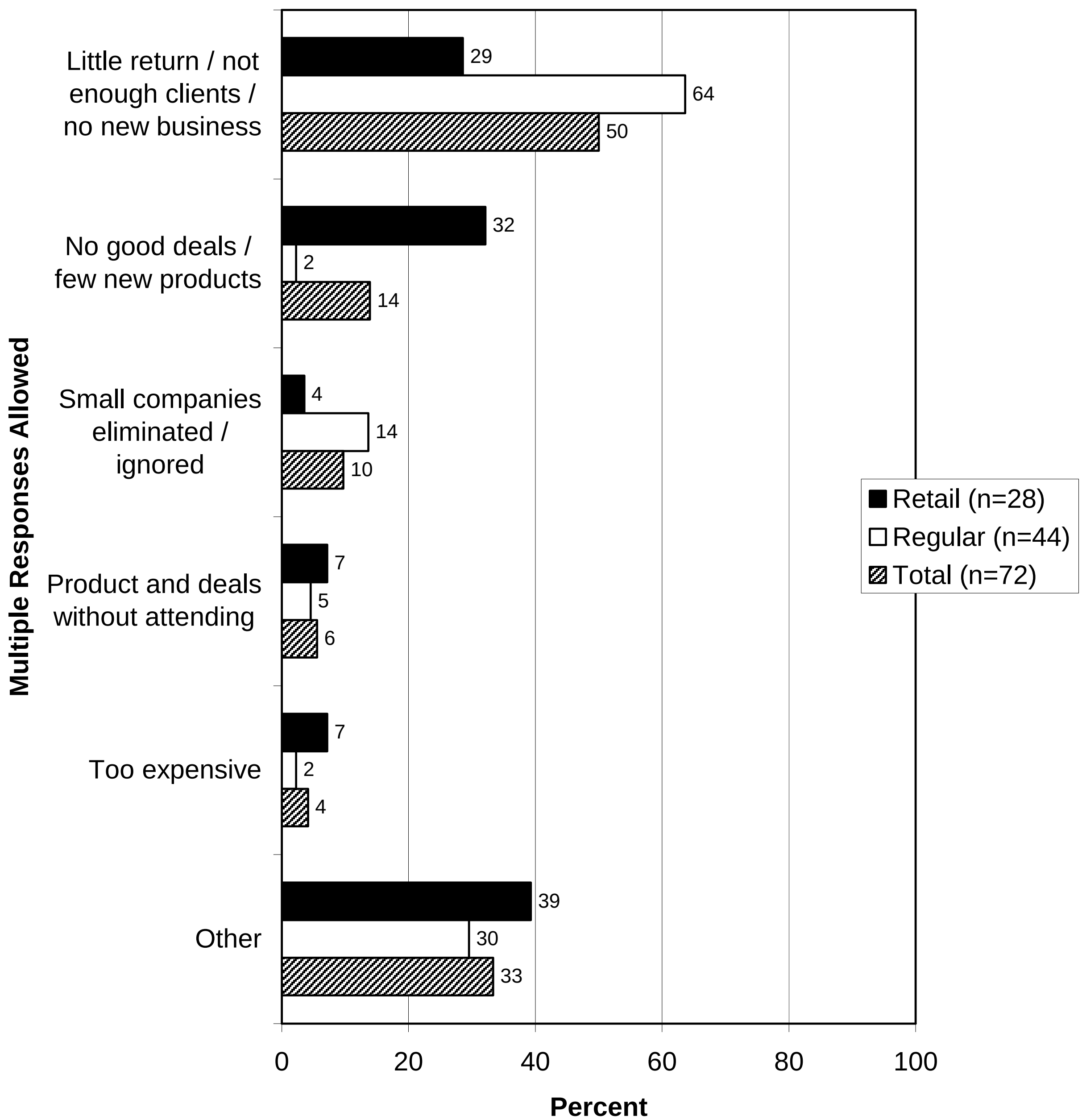
- Booth space at the ATA Trade Show has bearing on membership dues. As discussed previously, regular members were informed that ATA membership dues are currently based on booth space purchased at the ATA Trade Show, then they were asked whether they agree or disagree that ATA membership dues should continue to be based on the booth space. While a majority of regular members agree (54%), more than a third (36%) disagree.
  - Those who agreed most commonly did so because they perceive it as being an equitable and fair way to do it.
  - Those who disagreed most commonly did so because they say it is too expensive or that dues should be the same for all.
  - These graphs are shown in the section of this report titled, “Miscellaneous: ATA Structure, Procedures, and Rules.”

- Overwhelming majorities say that it is *very* likely that their company will attend the 2009 ATA Trade Show in Indianapolis (84% of retail and 88% of regular members). Only 7% of retail and 3% of regular members say it is not at all likely that their company will attend the 2009 Show.
    - Those who did not indicate likelihood to attend were asked why they did not plan to attend. The location (including too far to travel) and cost are the two most commonly named reasons. Note that there were very low numbers who did not plan to attend and who answered this follow-up question.

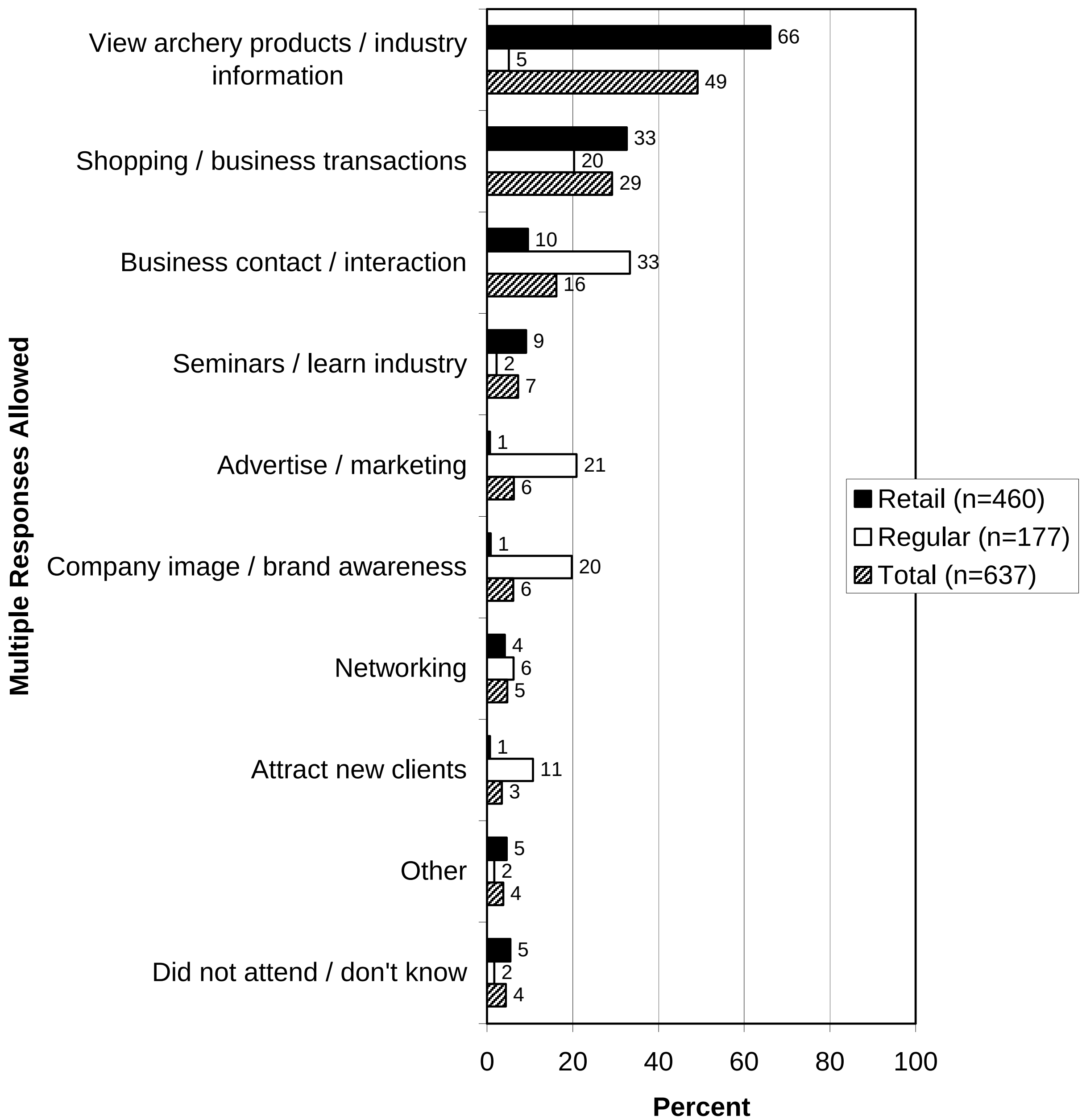
How would you rate the benefits of attending the ATA Trade Show for your company? Would you rate the benefits as excellent, good, fair, or poor?



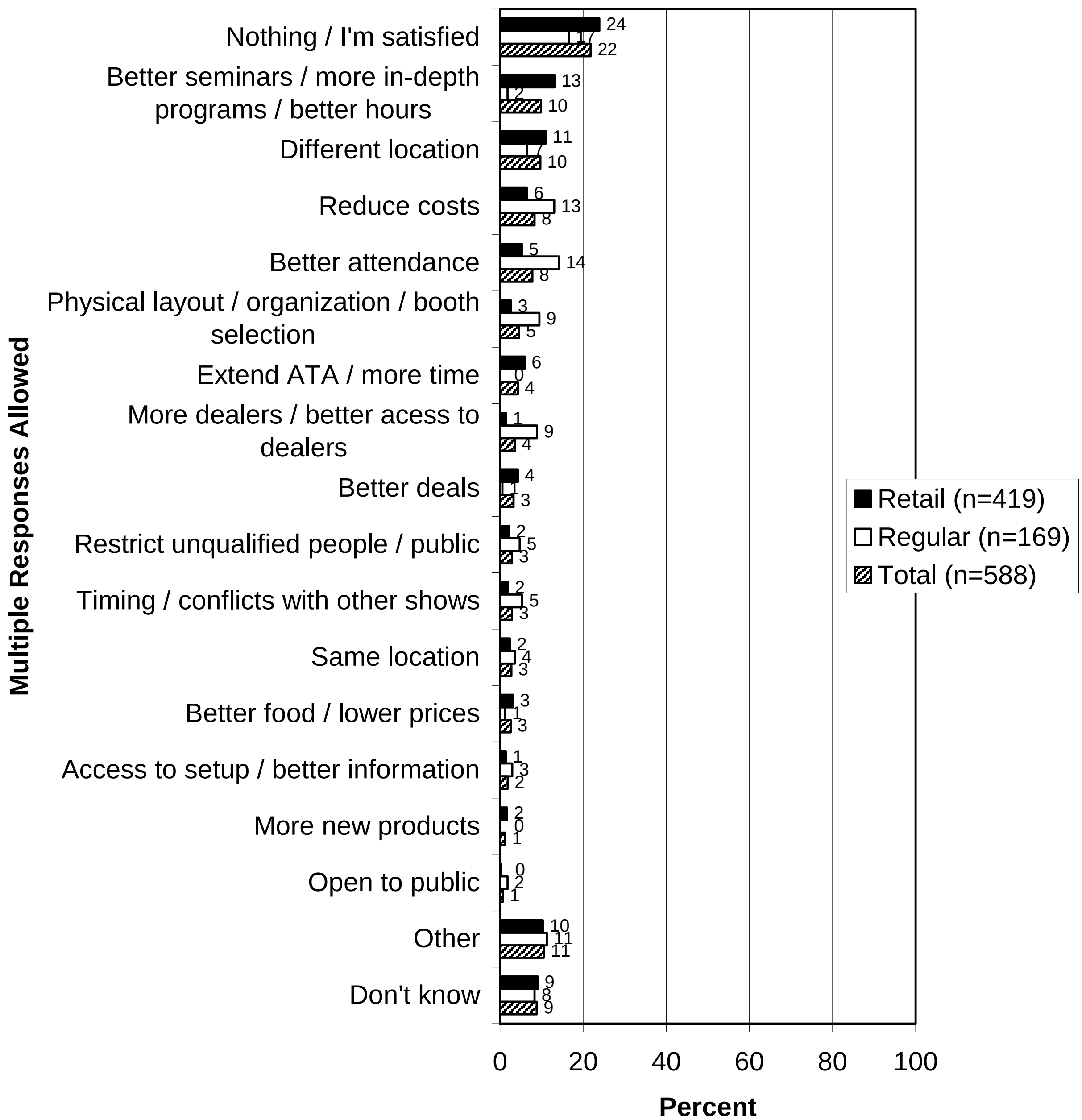
Why would you rate the benefits of attending the Trade Show as fair or poor? (Asked of current ATA members who rated the benefits of attending the ATA Trade Show for their company as fair or poor.)



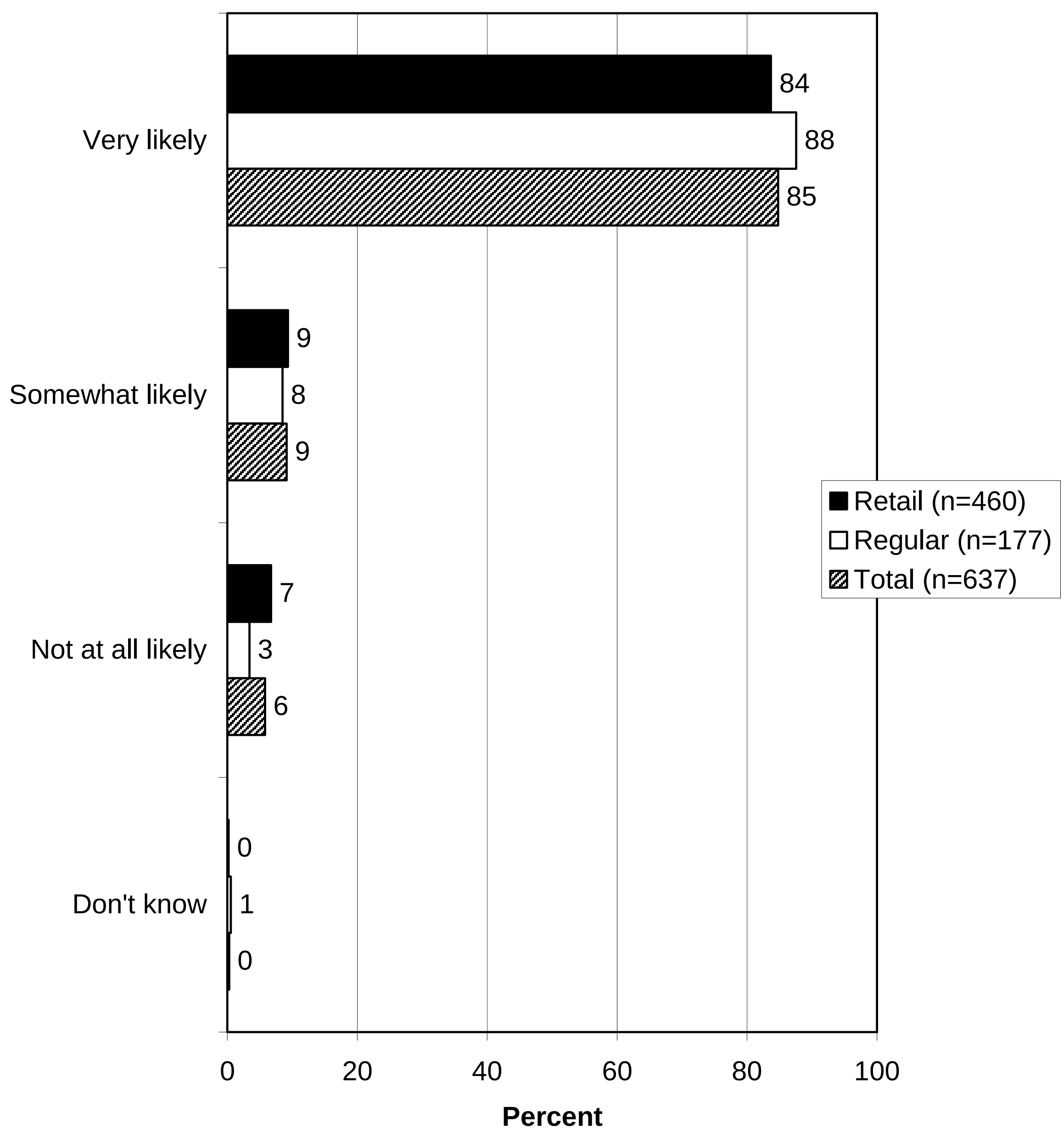
What is your most important reason for attending the ATA Trade Show?



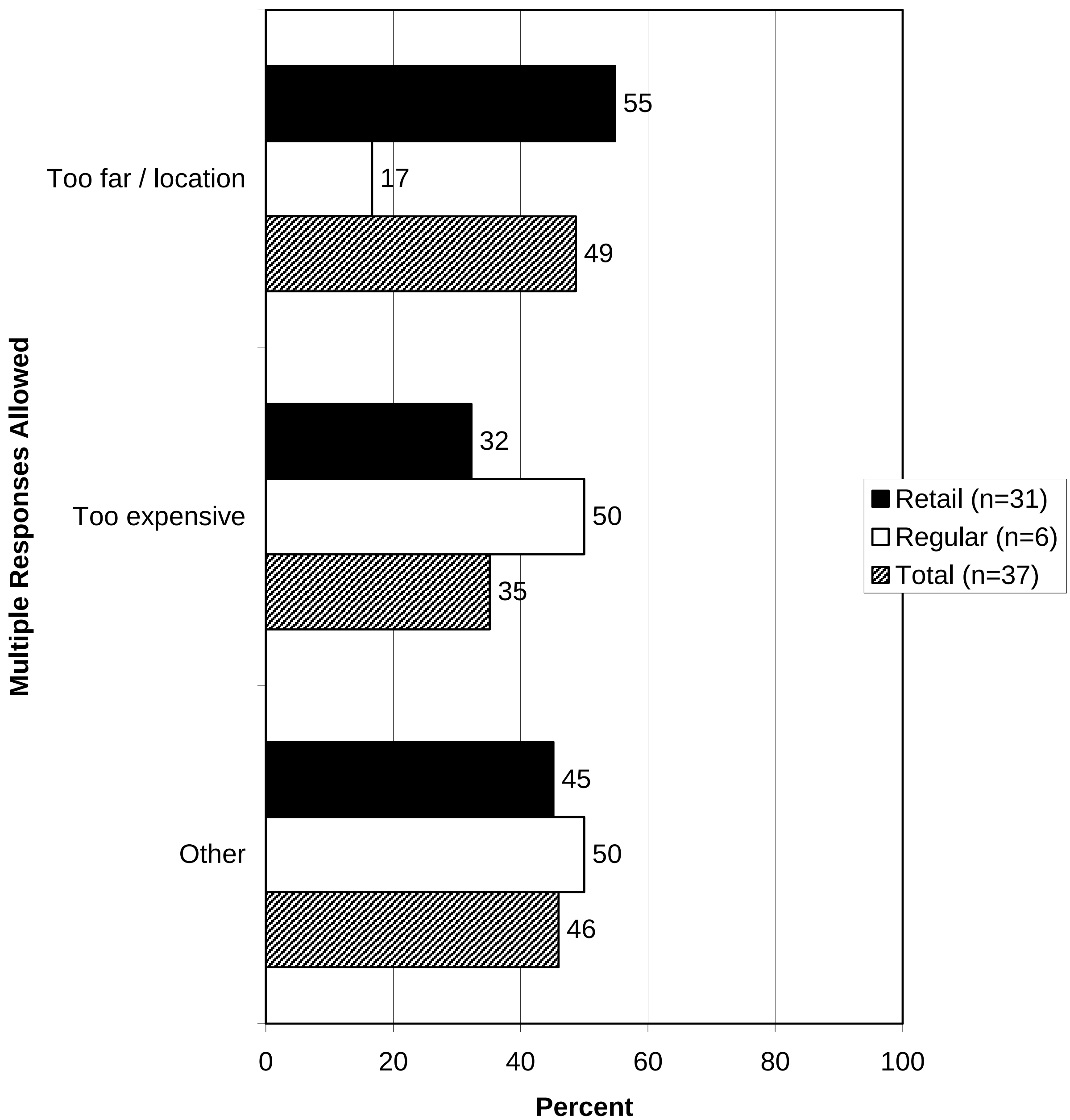
What aspects of the ATA Trade Show would you like to see improved?



Is your company very, somewhat, or not at all likely to attend the 2009 ATA Trade Show in Indianapolis?



Why is your company not at all likely to attend the 2009 ATA Trade Show? (Asked of current ATA members whose company is not at all likely to attend the 2009 ATA Trade Show in Indianapolis.)

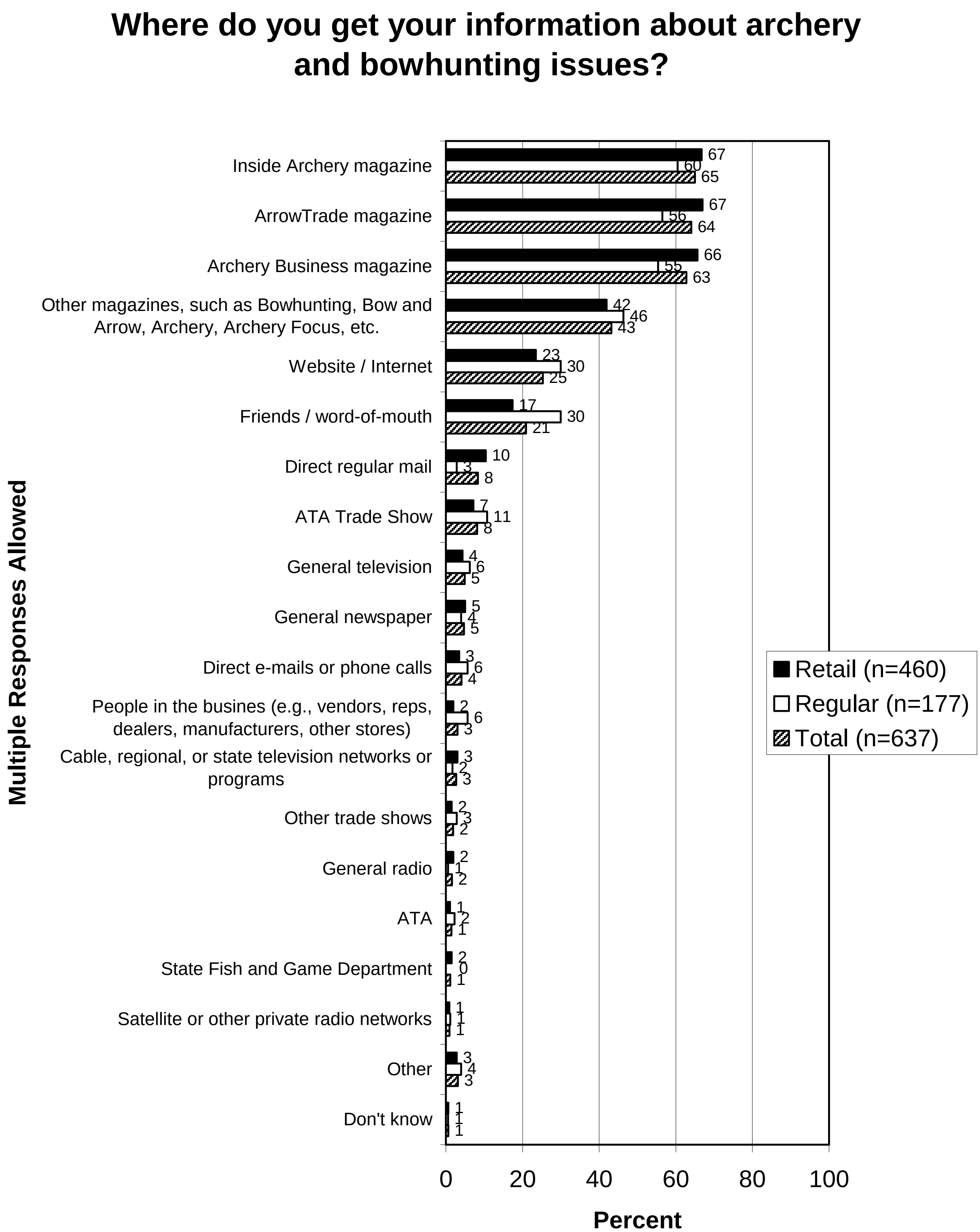


SOURCES OF INFORMATION ABOUT ARCHERY AND BOWHUNTING

- The survey asked respondents where they get their information about archery and bowhunting issues. The most common sources named by retail members are *Inside Archery* magazine, *ArrowTrade* magazine, *Archery Business* magazine, other magazines, and the Internet. These are the same most common sources among regular members, along with word-of-mouth.
  - Those who received telephone calls or e-mails about archery and bowhunting issues were asked to name the specific source: others in the industry, particularly dealers, sales representatives, and manufacturers, are the most common sources.

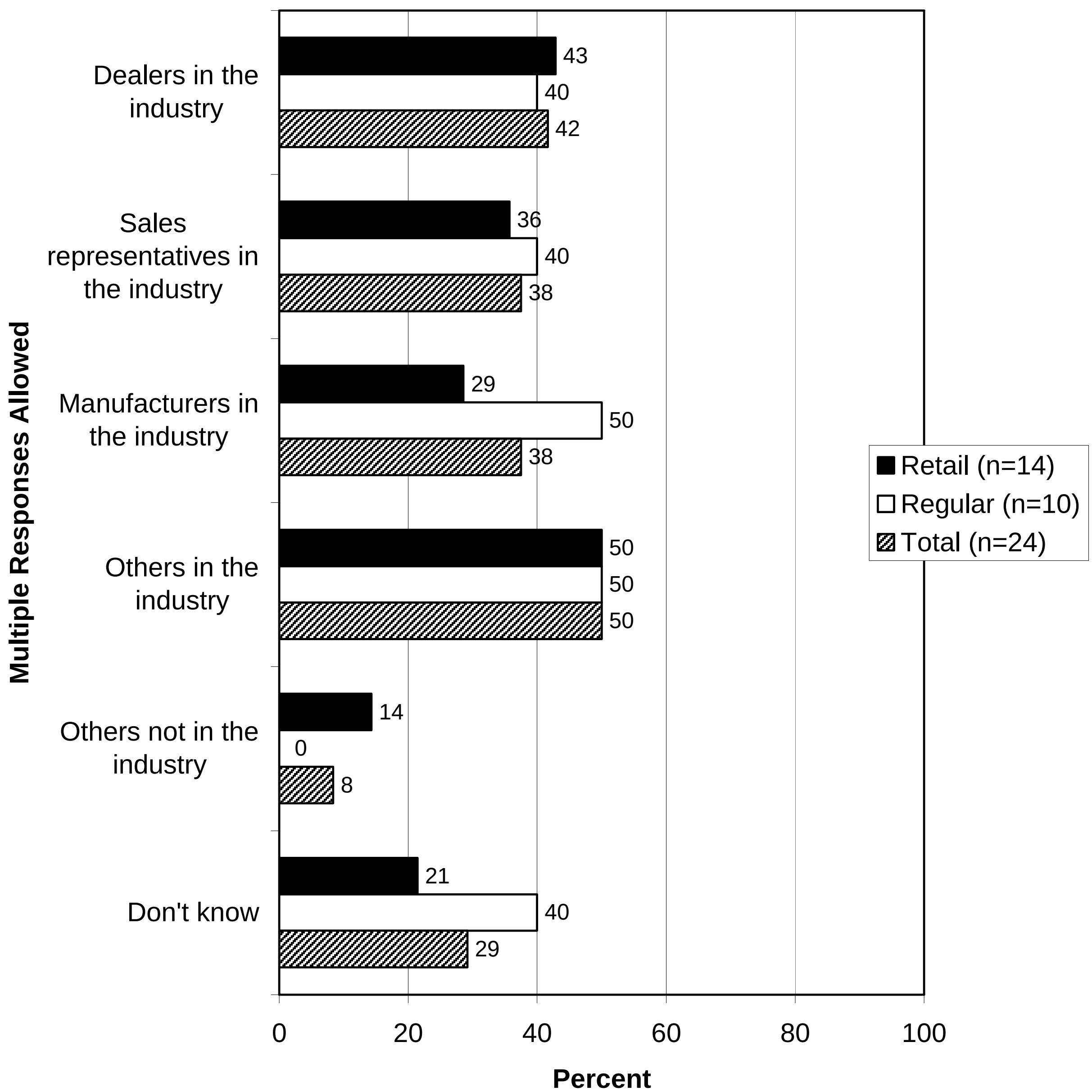
- The survey asked respondents where they get their information about the ATA. The most common sources named by retail members are the ATA column in *Inside Archery*, the ATA column in *ArrowTrade*, the ATA column in *Archery Business*, ATA mailings, the ATA online newsletter, and the ATA website. Among regular members, the most common sources are ATA mailings, the ATA online newsletter, the ATA website, the ATA column in *Inside Archery*, the ATA column in *ArrowTrade*, and the ATA column in *Archery Business*.
  - Those who received telephone calls or e-mails about the ATA were asked to name the specific source: others in the industry, particularly dealers, sales representatives, and manufacturers, are the most common sources.

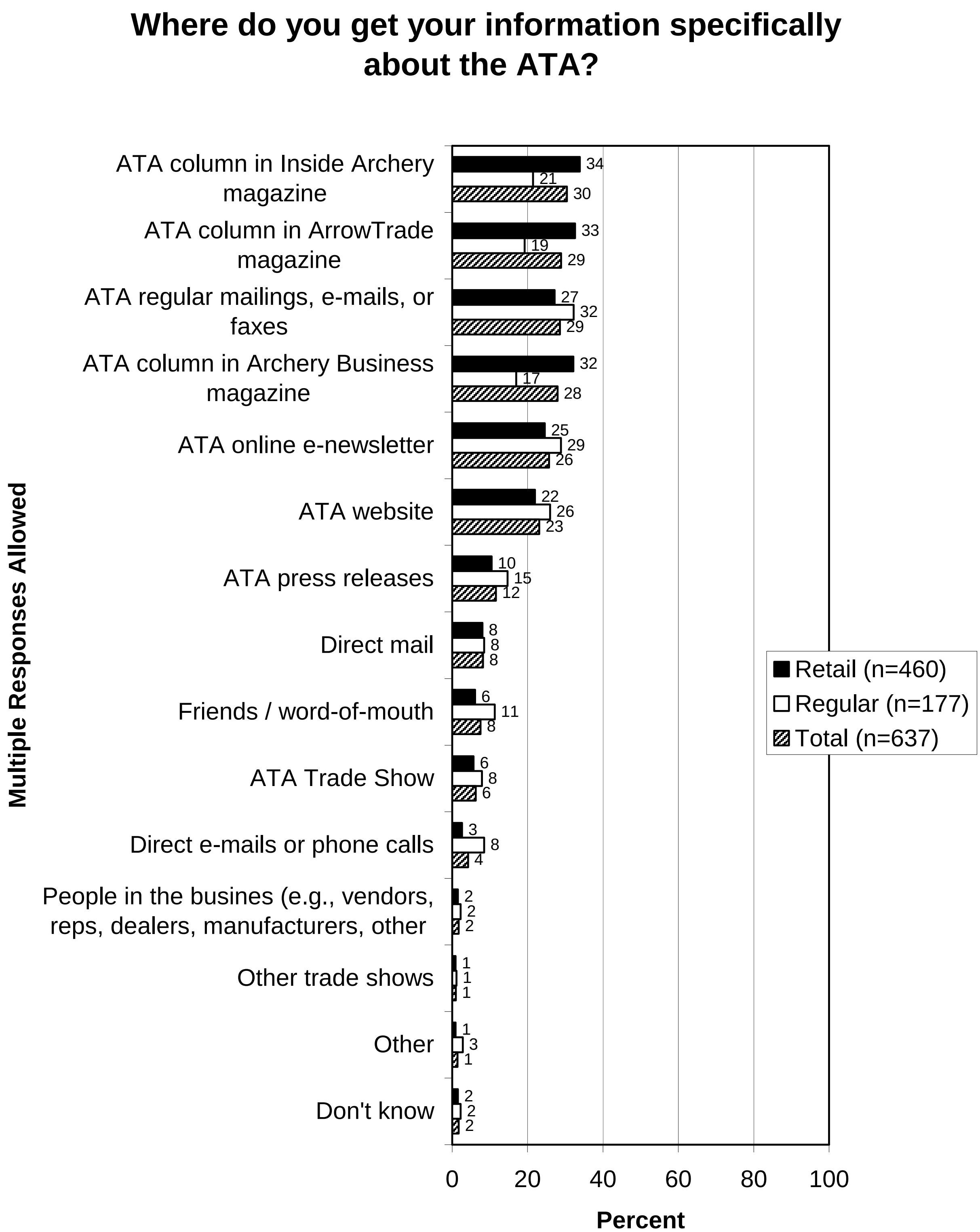
- When asked to name the preferred way for the ATA to provide them with information about the ATA, retail and regular members most commonly say direct e-mails, direct mail, the ATA online newsletter, *Inside Archery*, *Archery Business*, and *ArrowTrade*.

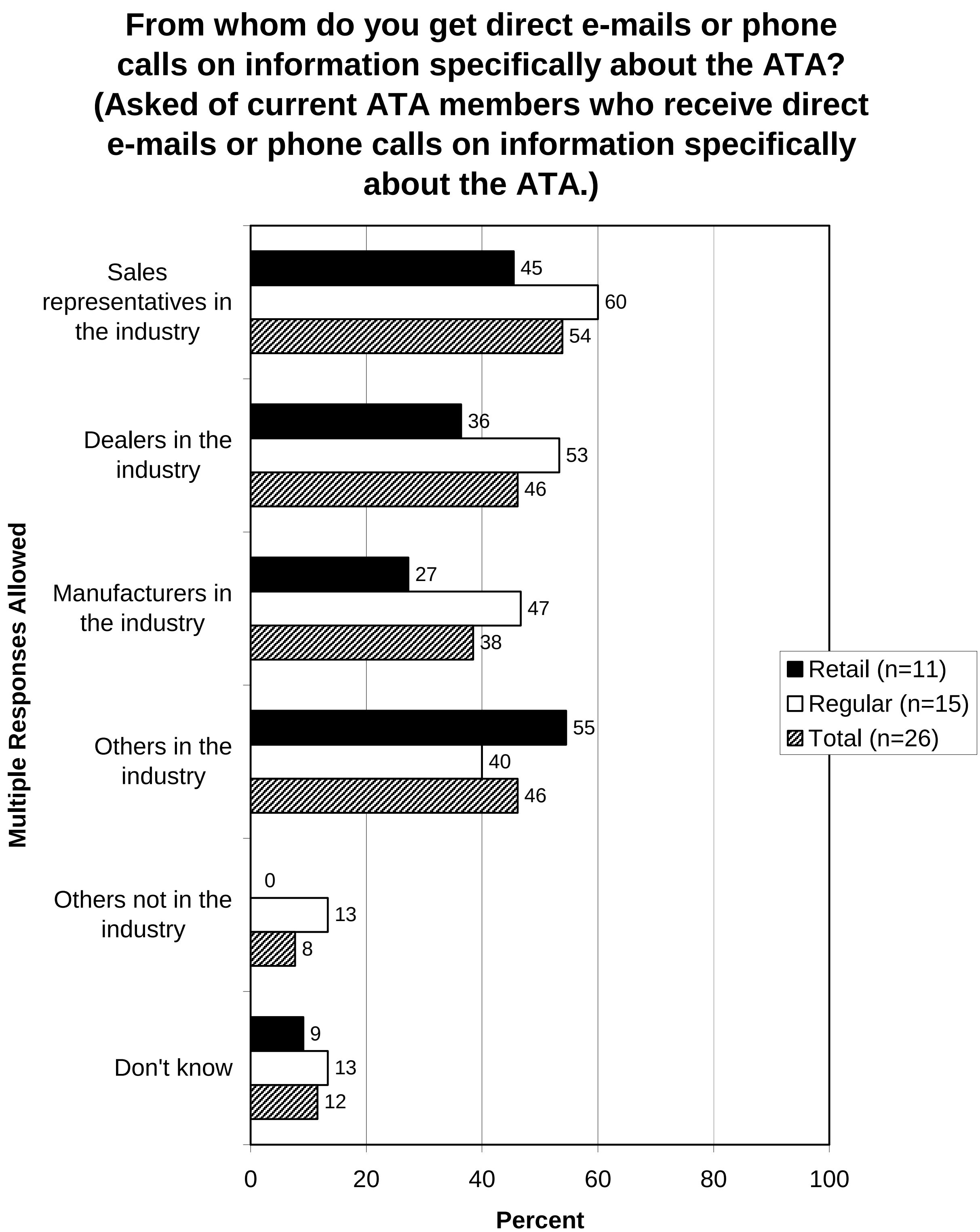


Where do you get your information about archery and bowhunting issues?
Inside Archery magazine
67
60
65
ArrowTrade magazine
67
56
64
Archery Business magazine
66
55
63
Other magazines, such as Bowhunting, Bow and Arrow, Archery, Archery Focus, etc.
42
46
43
Website / Internet
23
30
25
Friends / word-of-mouth
17
30
21
Direct regular mail
10
3
8
ATA Trade Show
7
11
8
General television
4
6
5
General newspaper
5
4
5
Direct e-mails or phone calls
3
6
4
People in the busines (e.g., vendors, reps, dealers, manufacturers, other stores)
2
6
3
Cable, regional, or state television networks or programs
3
2
3
Other trade shows
2
3
2
General radio
2
1
2
ATA
1
2
1
State Fish and Game Department
2
0
1
Satellite or other private radio networks
1
1
1
Other
3
4
3
Don't know
1
1
1
Multiple Responses Allowed
0
20
40
60
80
100
Percent
Retail (n=460)
Regular (n=177)
Total (n=637)

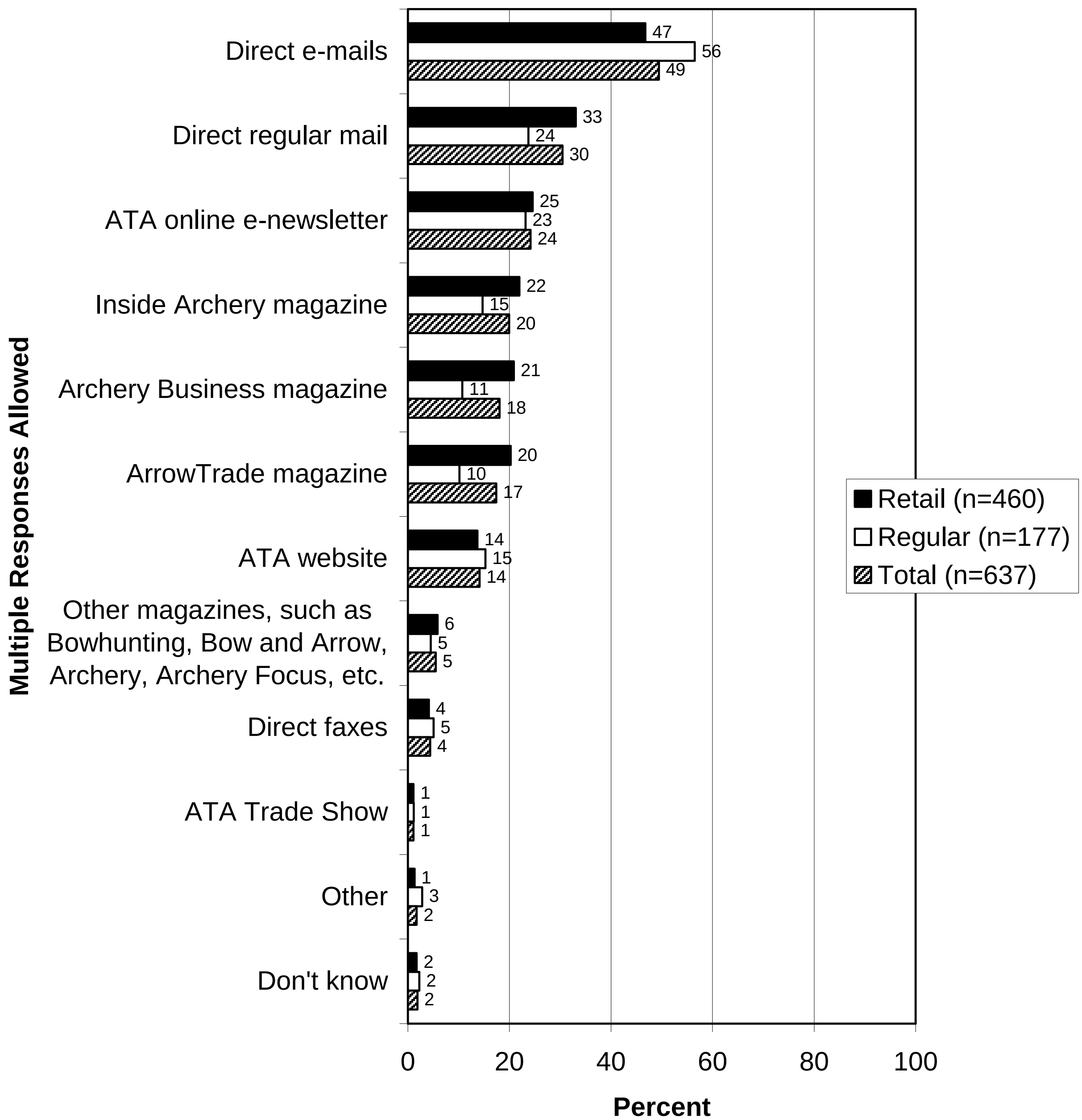
From whom do you get direct e-mails or phone calls on information about archery and bowhunting issues? (Asked of current ATA members who receive direct e-mails or phone calls on information about archery and bowhunting issues.)




Where do you get your information specifically about the ATA?
Multiple Responses Allowed
ATA column in Inside Archery magazine 34 21 30
ATA column in ArrowTrade magazine 33 19 29
ATA regular mailings, e-mails, or faxes 27 32 29
ATA column in Archery Business magazine 32 17 28
ATA online e-newsletter 25 29 26
ATA website 22 26 23
ATA press releases 10 15 12
Direct mail 8 8 8
Friends / word-of-mouth 6 11 8
ATA Trade Show 6 8 6
Direct e-mails or phone calls 3 8 4
People in the busines (e.g., vendors, reps, dealers, manufacturers, other 2 2 2
Other trade shows 1 1 1
Other 1 3 1
Don't know 2 2 2
Retail (n=460)
Regular (n=177)
Total (n=637)
0
20
40
60
80
100
Percent


From whom do you get direct e-mails or phone calls on information specifically about the ATA? (Asked of current ATA members who receive direct e-mails or phone calls on information specifically about the ATA.)
Multiple Responses Allowed
Sales representatives in the industry
45
60
54
Dealers in the industry
36
53
46
Manufacturers in the industry
27
47
38
Others in the industry
55
40
46
Others not in the industry
0
13
8
Don't know
9
13
12
0
20
40
60
80
100
Percent
Retail (n=11)
Regular (n=15)
Total (n=26)

What are the best ways to provide you with information on ATA?



INFORMATION ABOUT ATA MEMBER COMPANIES

- The overwhelming majority of retail members represent retail stores (i.e., physical buildings/shops) (88%), with just a few Internet sales companies. The overwhelming majority of regular members represent manufacturers (82%), with a few distributors (7%) and sales representatives (also 6%) in the sample. The types of products sold/produced are shown.

- Graphs show the number of full-time and part-time employees of the companies represented in the samples. The results show the presence of many small companies.
  - Two-thirds of retail members (67%) indicated that their company has only 1, 2, or 3 full-time employees. Regular members' companies are slightly larger: 29% indicated that their company has 1, 2, or 3 full-time employees.
  - The median number of full-time employees is 2 employees among retail members and 8 employees among regular members.
  - Regarding part-time employees, the median number of part-time employees is 2 employees among retail members and 3 employees among regular members.

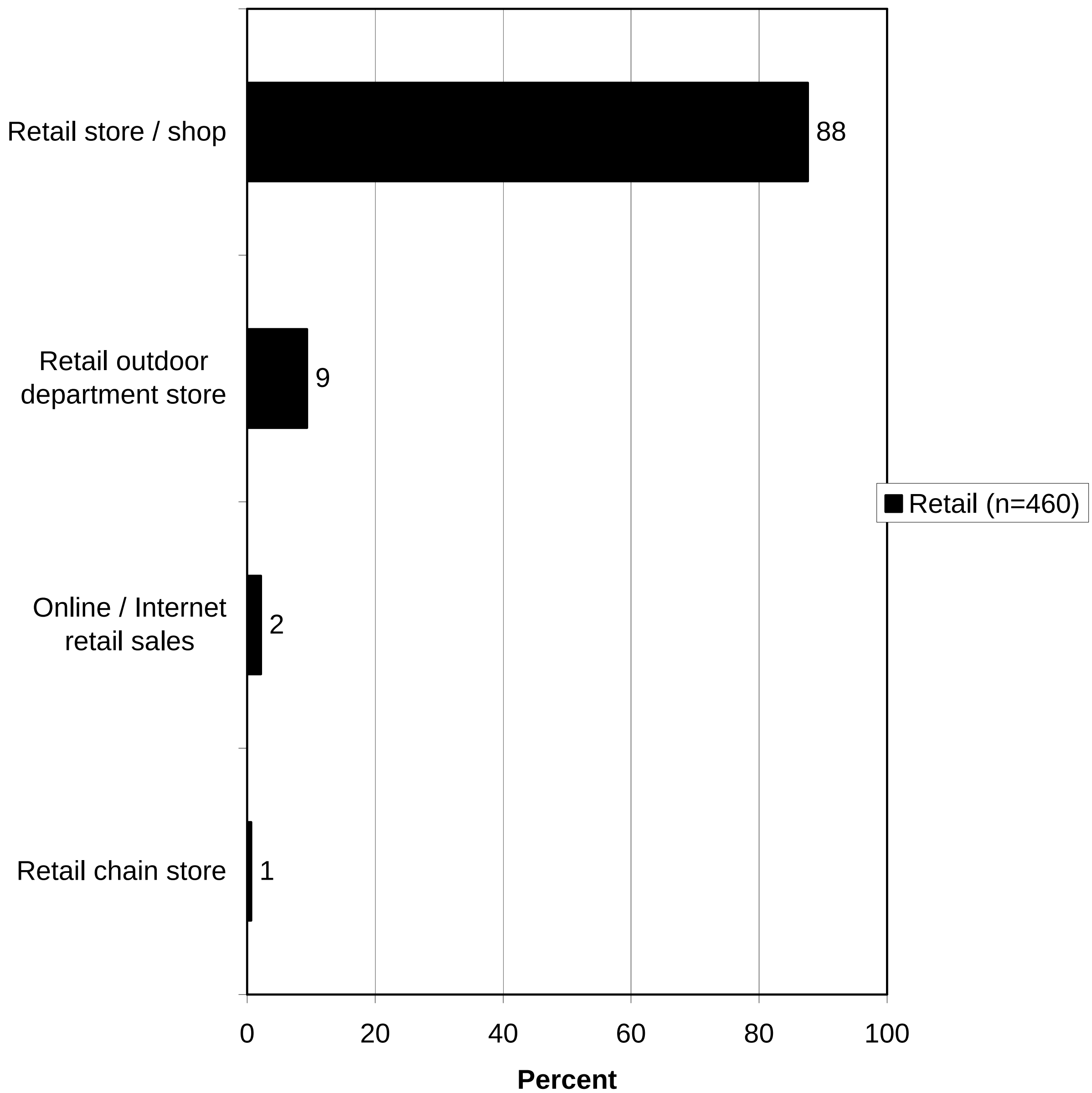
- Annual sales of the companies in the sample are shown, with a wide distribution from very small companies (based on sales) to large companies. Not that many respondents could not (or would not) say. The median sales among retail members' companies is $292,000; the median sales among regular members' companies is $1,050,000.

- The states and cities in which company headquarters are located is shown.
  - Among retail members, Illinois, Indiana, Wisconsin, Michigan, Pennsylvania, Missouri, and Ohio are important states (all at 5% or more).
  - Among regular members, Michigan, Wisconsin, Illinois, and Ohio are important states (all at 5% or more).
  - Interestingly, Great Lakes states have many headquarters of companies in the ATA.

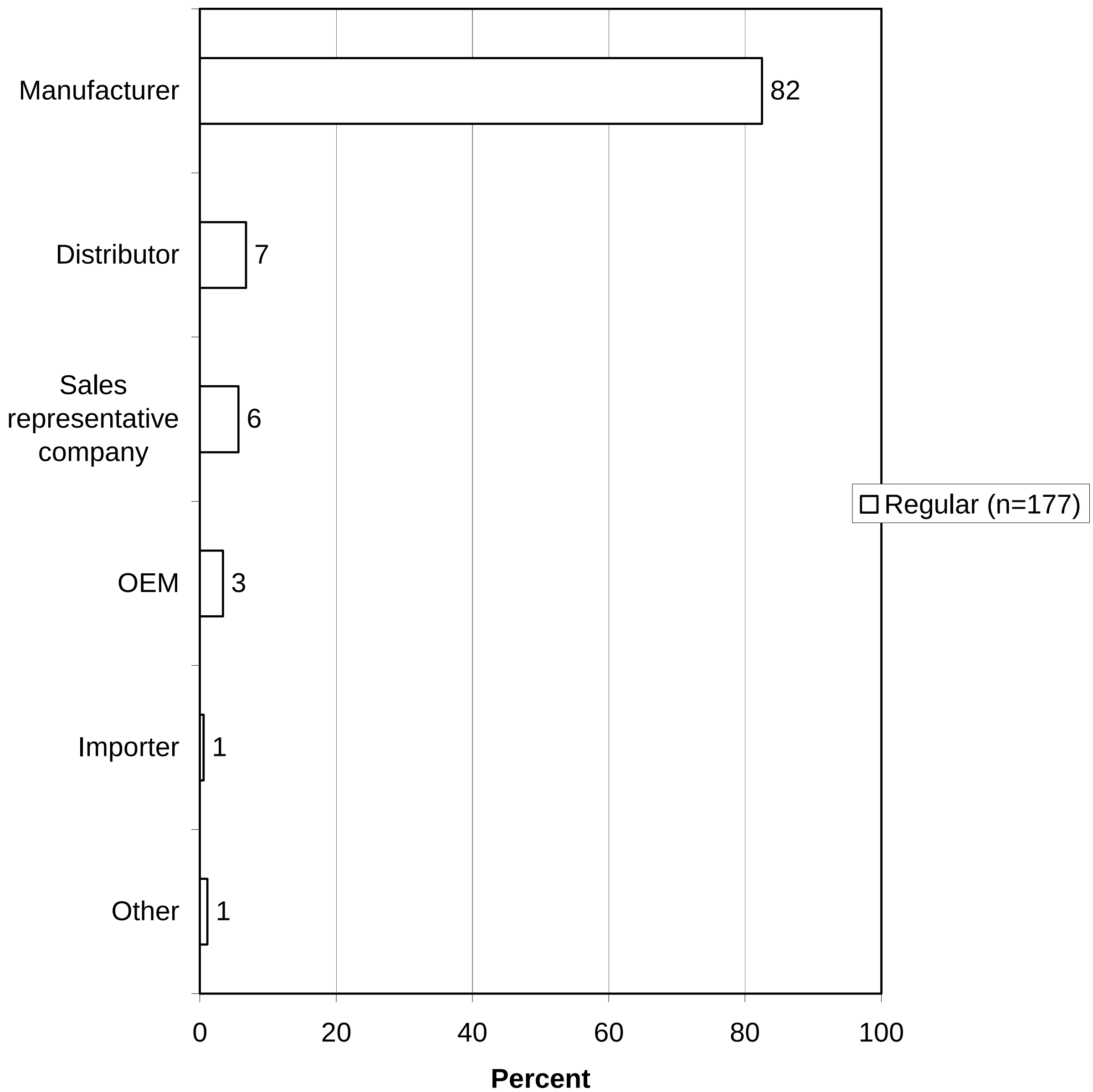
- A small percentage (4%) of retail members indicate that their company is a member of the ATA Dealer Council.

- A small percentage (7%) of regular members indicate that their company is a member of the ATA Board.

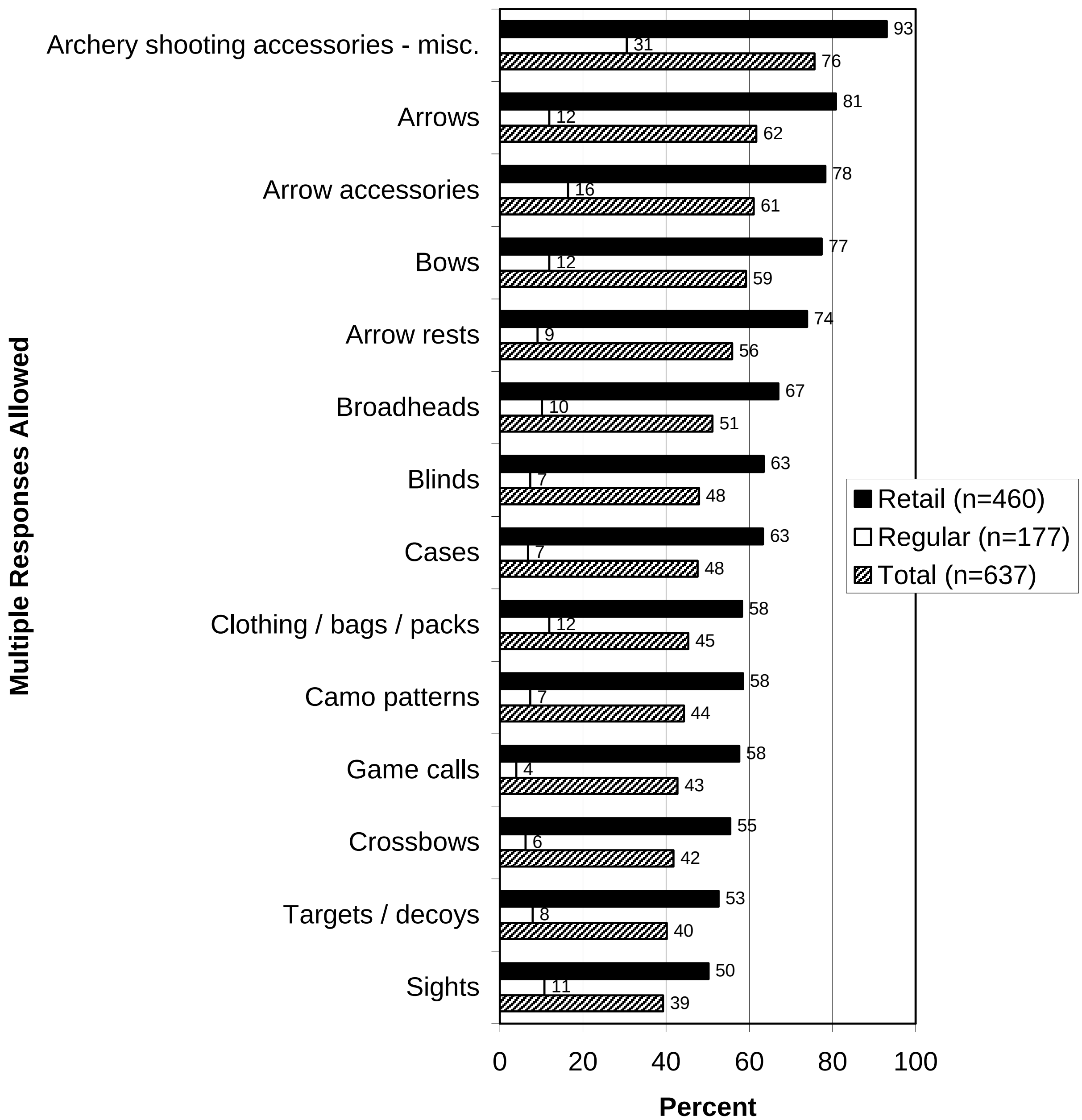
Which of the following best describes your business?



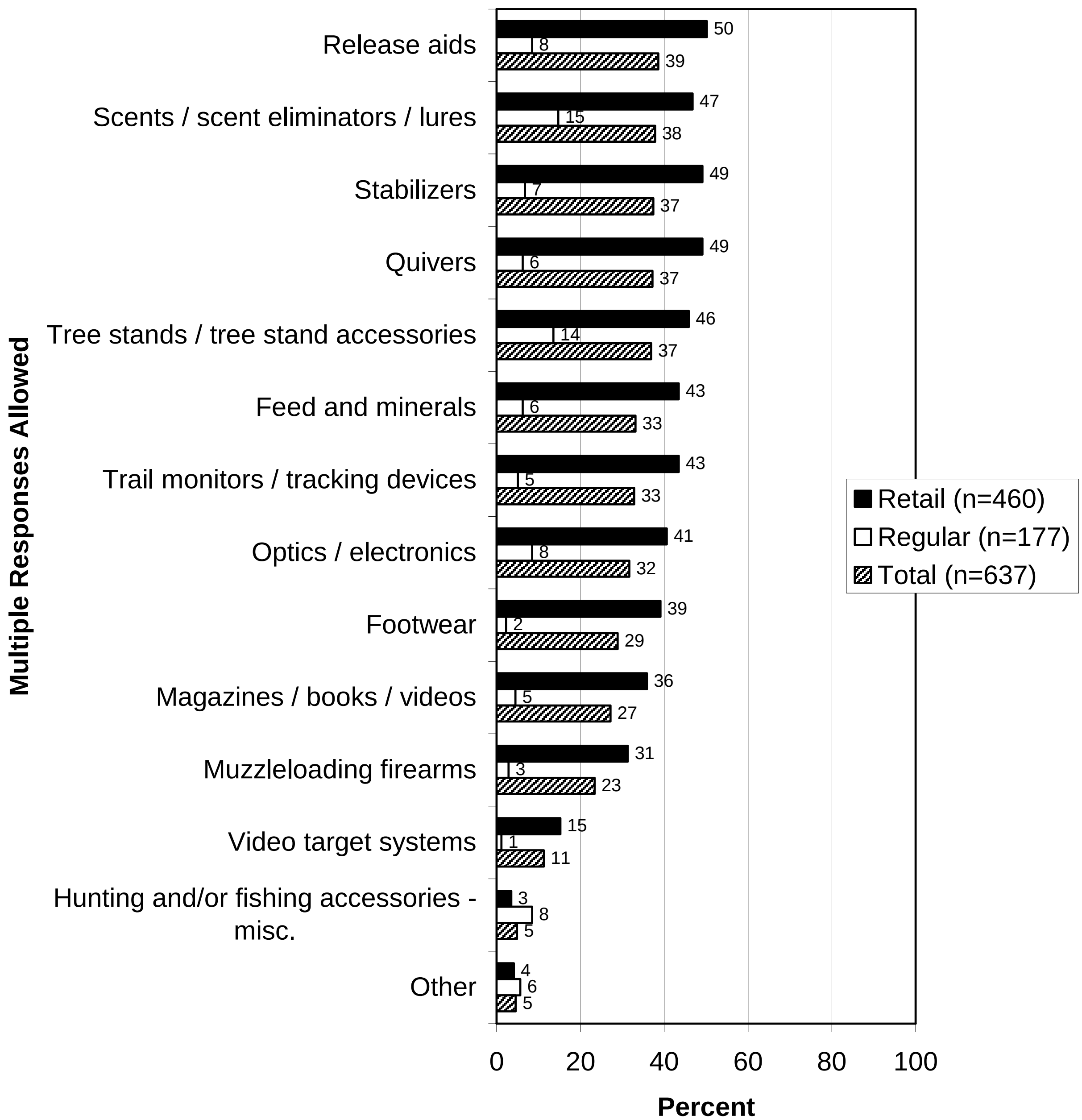
Which of the following best describes your business?



What products does your company produce/sell? (Part 1)

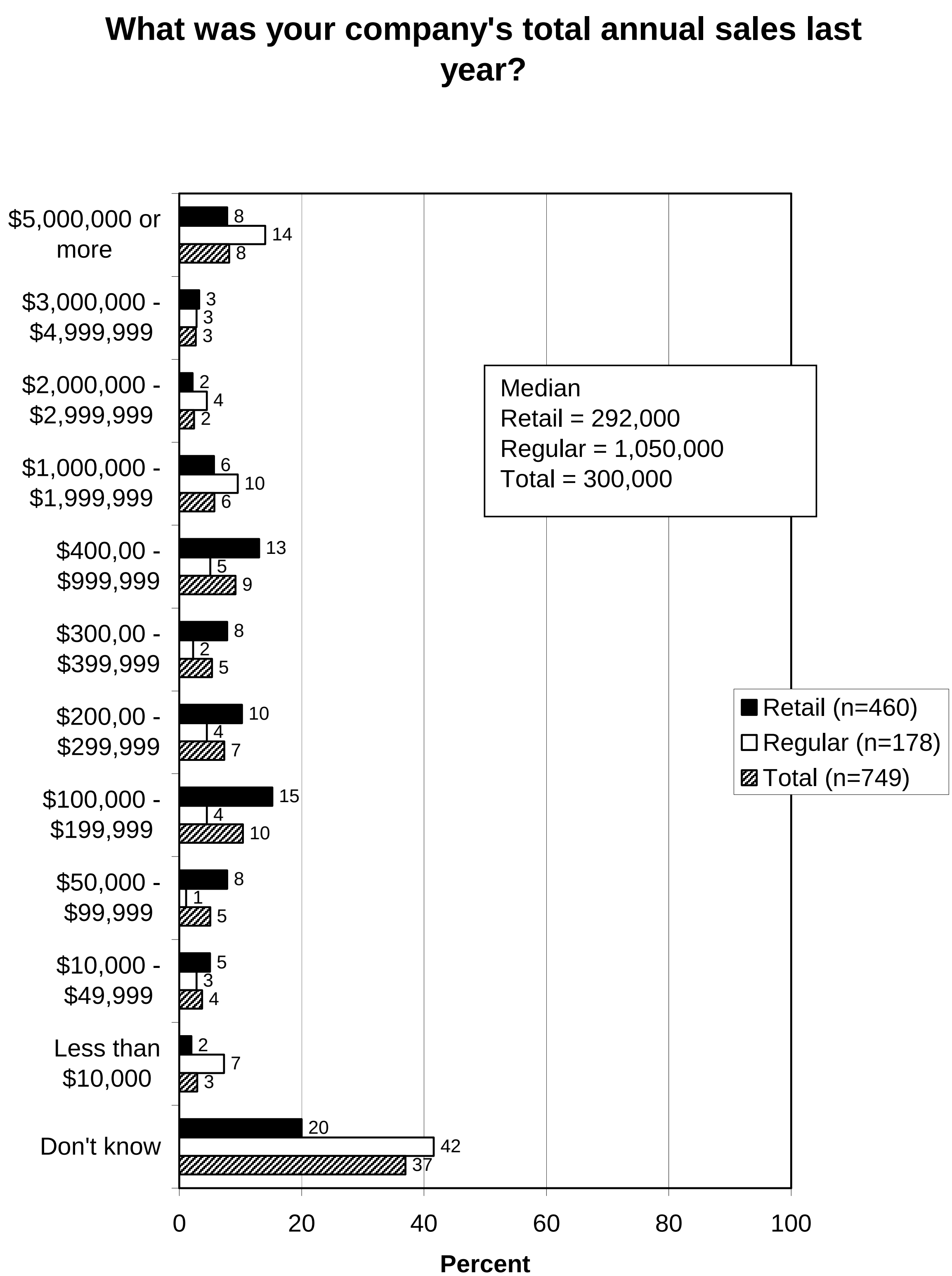


What products does your company produce/sell? (Part 2)

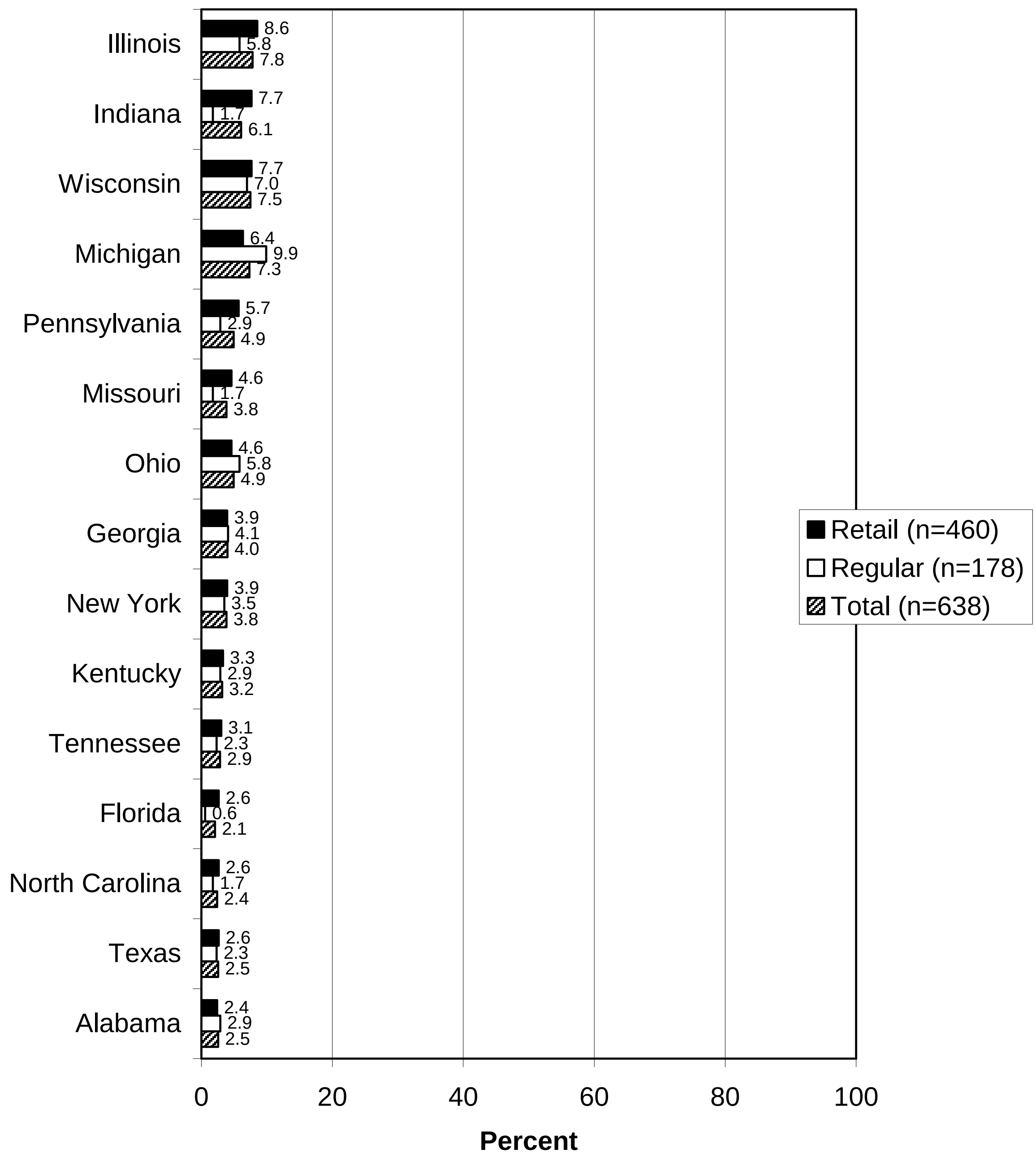


How many full-time permanent employees does your company have?

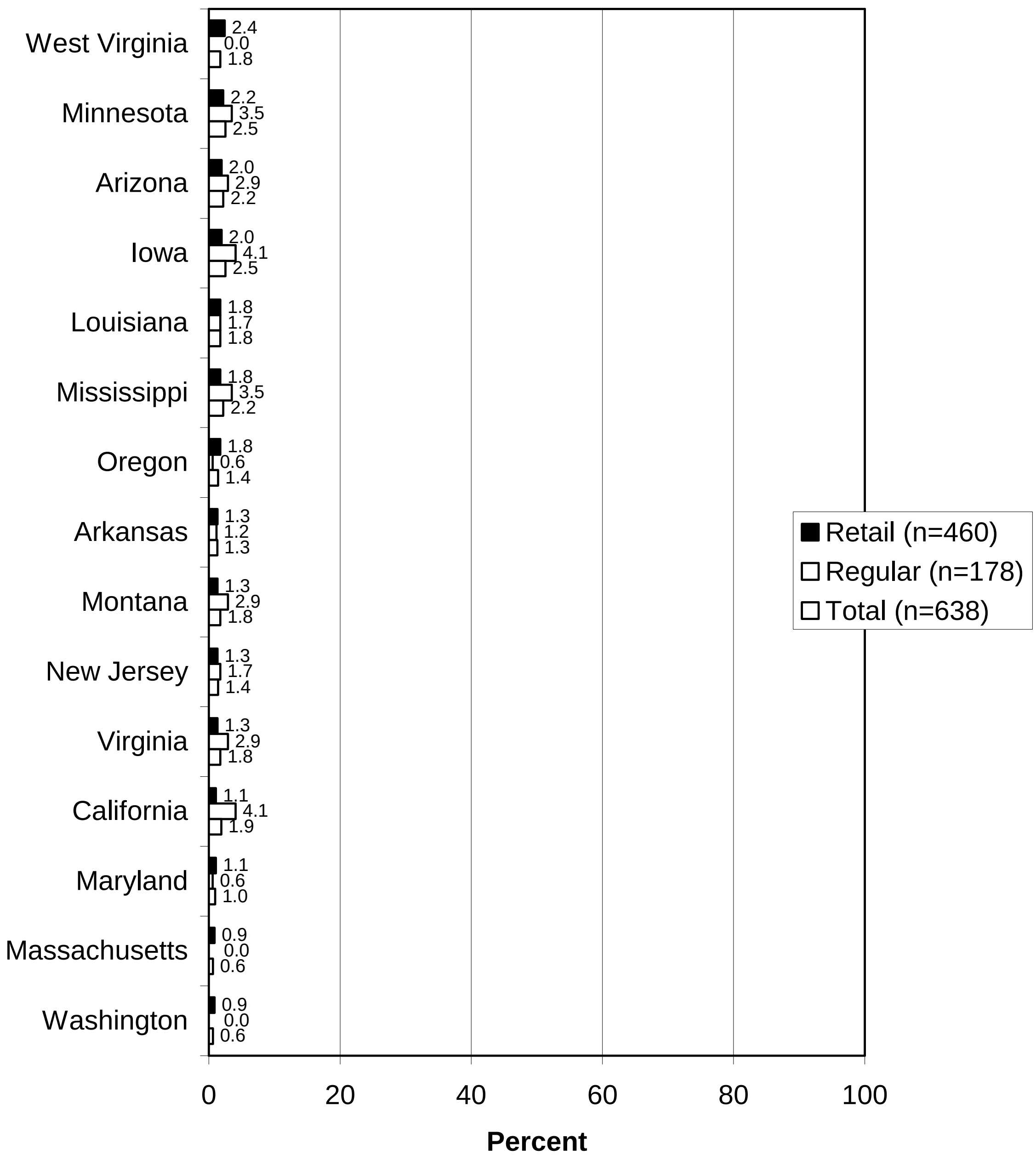
How many part-time, temporary, or seasonal employees does your company have?


What was your company's total annual sales last year?
$5,000,000 or more
8
14
8
$3,000,000 - $4,999,999
3
3
3
$2,000,000 - $2,999,999
2
4
2
$1,000,000 - $1,999,999
6
10
6
$400,00 - $999,999
13
5
9
$300,00 - $399,999
8
2
5
$200,00 - $299,999
10
4
7
$100,000 - $199,999
15
4
10
$50,000 - $99,999
8
1
5
$10,000 - $49,999
5
3
4
Less than $10,000
2
7
3
Don't know
20
42
37
0
20
40
60
80
100
Percent
Median
Retail = 292,000
Regular = 1,050,000
Total = 300,000
Retail (n=460)
Regular (n=178)
Total (n=749)

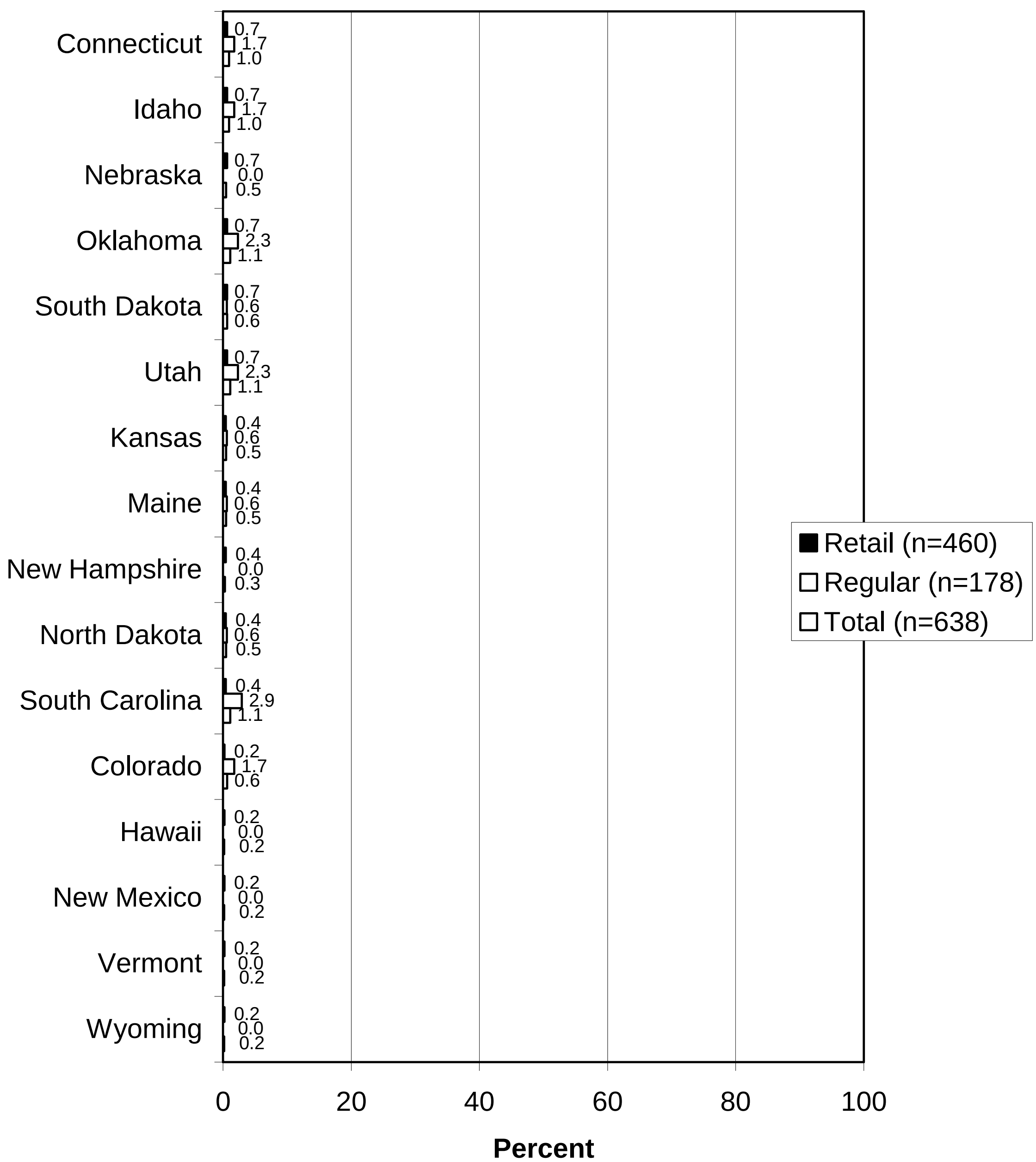
In what state is your company headquarters located? (Part 1)

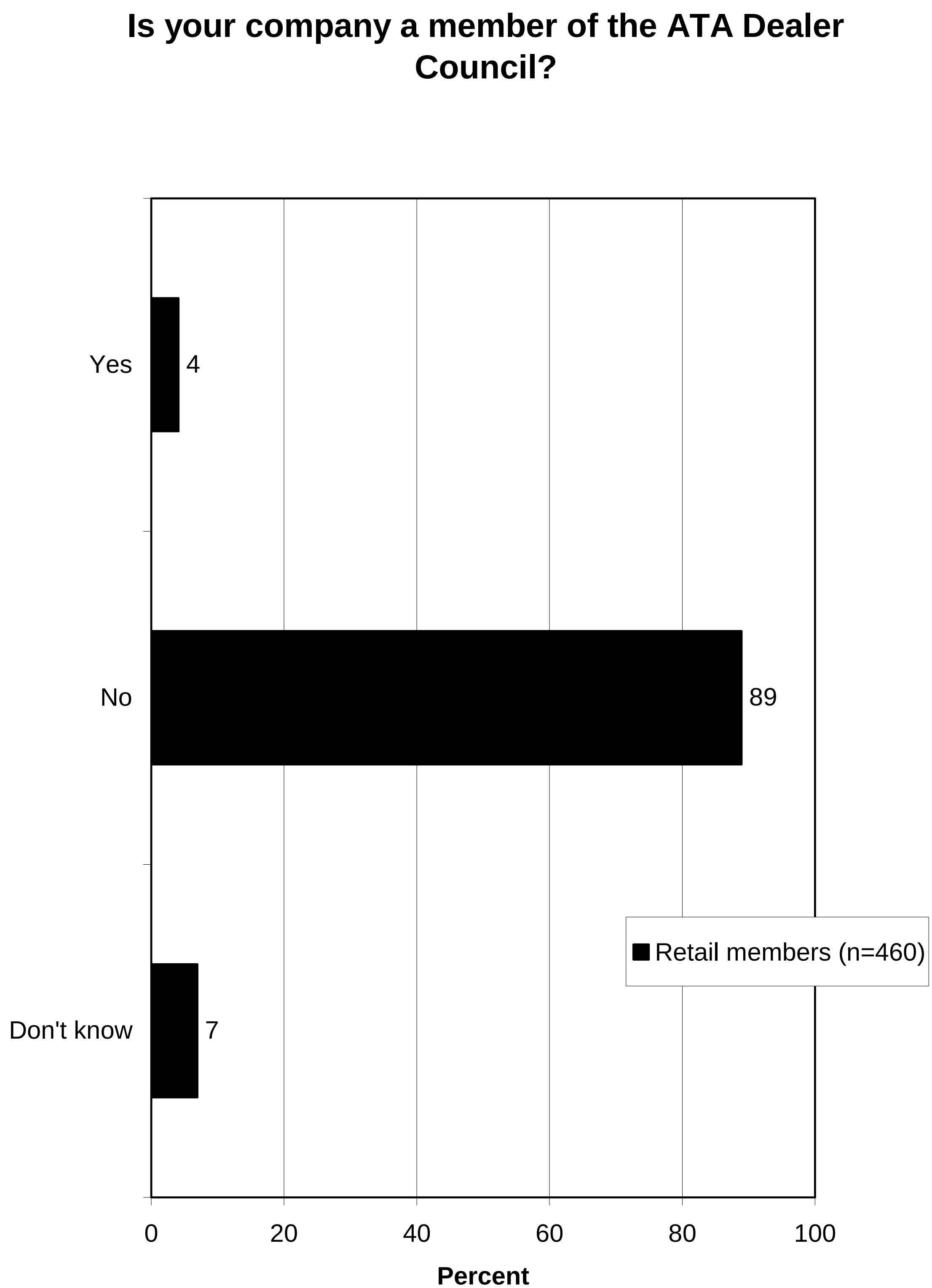


In what state is your company headquarters located? (Part 2)

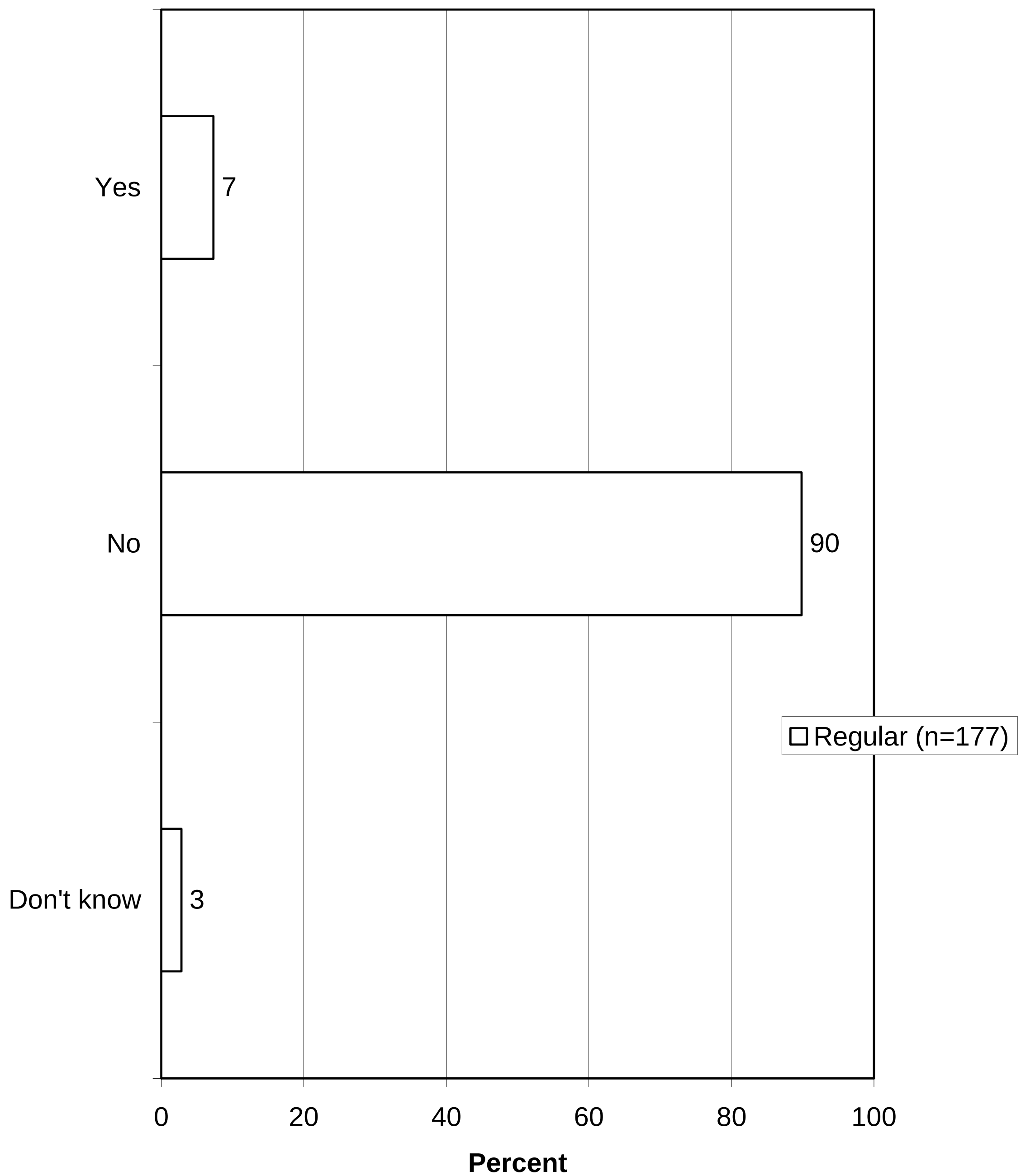


In what state is your company headquarters located? (Part 3)




Is your company a member of the ATA Dealer Council?
Yes
4
No
89
Don't know
7
Retail members (n=460)
0
20
40
60
80
100
Percent

Is your company a member of the ATA Board?



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 Web sites 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*.

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