CO-OPERATIVE MARKET RESEARCH IN THE GARDEN INDUSTRY MANUFACTURERS ASSOCIATION

Vyvyan Penrose Courtney-Wildman B.Sc.

A Thesis submitted for the Degree of Doctor of Philosophy

at

The University of Aston in Birmingham

September 1985

"A Trade Association differs from a company in that its only real product is, in fact, information."

Adler 1975

The University of Aston in Birmingham

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As product sellers become more competitive by their greater consumer orientation the need to understand their markets becomes more important. This concept also applies to trade associations whose ability to offer services which satisfy their consumers (that is to say, their members) is restricted by the increasing fragmentation of associations which limits their resources. By providing the information product sellers require, trade associations can offer tangible satisfactions which, because few others provide such services, can be discerned from those of their competitors. The likelihood of research services satisfying members depends on the accurate assessment of their needs. Such assessments are difficult because associations' staff generally lack adequate knowledge and the literature offers little advice about how needs can be assessed or what factors might be important.

The G.I.M.A. study used an action research approach which not only assessed managers' needs for information but also the factors which affected their purchase decisions. Important influences included their uncertainty about using market research and the accuracy, relevance and cost of the data provided. The approach also identified G.I.M.A.'s major weaknesses in offering a service, including their lack of knowledge about market research, market researchers and the product fields to be covered. By undertaking strategies to strengthen these weaknesses it was possible to propose a programme of progressive research. This enabled managers to experience basic trend data at low cost and, with this experience to opt at a later date for more complex and potentially more beneficial information which involved higher costs. The programme also allowed the Association to develop its ability to co-ordinate the financial and advisory aspects of a co-operative market research service.

As well as the practical aspects, the G.I.M.A. study also has theoretical implications for organisational buyer behaviour.

Trade Associations, Co-operation, Market Research, Buyer Behaviour, Garden Industry.

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ACKNOWLEDGEMENTS

This thesis was carried out under the auspices of the Interdisciplinary Higher Degrees Scheme of the University of Aston in Birmingham and the Garden Industry Manufacturers Association. I gratefully acknowledge the many members of both institutions who gave their time and knowledge to help the research progress.

I am particularly indebted to my supervisors Dr Alastair Cochran and Mr Mike Harker from the University and Mr Neville Snowdon from the Association for their many and varied contributions.

Finally, I would like to express my thanks to Mr Timothy Shackel for his encouragement and support.

CHAPTER ONE

THE RESEARCH BACKGROUND

1.1 INTRODUCTION

This thesis examines the feasibility of a particular trade association undertaking co-operative market research. The examination is presented in the form of a case study in which the principal actors are the researcher, the Garden Industry Manufacturers' Association and the Interdisciplinary Higher Degrees Scheme at the University of Aston in Birmingham. The interaction of these actors is perhaps best explained by the term 'action research' which is commonly thought to meet eight conditions (Hult and Lennung 1980). These are that the research:

(1) aims at action and research,

(2) provides a learning situation for the actors,

(3) is performed collaboratively,

(4) is undertaken within the problem situation,

(5) involves a cyclical flow of data,

(6) studies the problem as a whole,

(7) is used to implement change, and

(8) falls within an acceptable ethical framework.

The study was an interactive one, involving a cycle of problem definition, data feedback and the implementation of change. In writing this account of the work undertaken, the emphasis has been to simplify the concurrent nature of events without losing the importance of the sequence in which they occurred.

The account begins in Chapter Two by examining the relevant literature and appraising it where it is both sufficient and insufficient. This literature forms the

basis of the investigation into the feasibility of co-operative market research which is described in Chapters Three, Four, Five and Six. Chapter Seven summarises the study and its implications for both marketing practice and theory.

The rest of this Chapter considers the general background to the problem situation. This includes details about the sponsors, the study's origins, the garden trade and researching the garden market.

1.2 THE SPONSORS

The Garden Industry Manufacturers' Association (hereinafter "G.I.M.A.") was formed in 1977 with the objective of promoting the trade of garden goods for its members. In order to reach this objective G.I.M.A. provided a forum for discussion between the various sectors of the trade and ran a trade exhibition. These activities were co-ordinated by the seventeen elected Council members and a full-time secretary.

At the beginning of the study, in September 1981, G.I.M.A. had 67 members a number which rose to 74 by the study's completion in 1984. The member companies, whose annual turnovers varied from £100,000 to over thirty-five millions, paid membership subscriptions according to one of three turnover bands. This constituted the main revenue of the Association which amounted to £30,000 in 1981 rising to £70,000 in 1984.

1.3 THE ORIGINS OF THE STUDY

In April 1981, motivated by the interest of a hypermarket in the Industry, the Council focussed its attention on the need to collect market research data. In an attempt to promote the Industry as a good investment, a number of G.I.M.A. members offered the hyperstore management market data. Unfortunately, the various data gave conflicting views of the market, a factor which almost caused the investment to be lost. As a consequence of this the G.I.M.A. Council agreed that it was essential to seek a common understanding of the Garden market. Three proposals were considered, two from market research companies and one from Aston University. All three were based on the assumption that:

> "G.I.M.A. members believe that there has been insufficient effort in the past to quantify various sectors of the market in a way that is acceptable to companies operating in that market."
>
> (G.I.M.A. Council Minutes 1981)

The proposal from the University of Aston in Birmingham differed from the other two by addressing itself to ways of researching the need for market research rather than one method of collecting research data. In both the other cases this method concerned gathering the opinions of 500 members of the trade about market sizes. The Council rejected this methodology because it was uncertain that the data collected would quantify the market in a way acceptable to the members of G.I.M.A. They felt it was necessary to (a) understand members' information needs, (b) assess the potential of existing research to satisfy those needs, and (c) recommend any additional research required based on a firm understanding of the garden trade.

1.4 THE TRADE OF GARDEN GOODS

The Garden Industry, like some other Industries, embraces a variety of manufacturing processes and end products. In common with other leisure markets the garden trade is affected by factors such as the amount of leisure time and disposable income. It is particularly influenced by changes in the seasons and the weather and by certain other factors which perhaps make garden products more difficult to research than other products.

Firstly, many garden products have a low and fragmented distribution, making the selection of a sample of retail outlets for research difficult. This difficulty is compounded by the fact that many products have very different retail distributions. For example, seeds are primarily sold through mail order houses but they can also be bought in newsagents, supermarkets as well as the more common garden outlets. Plastic flower pots, on the other hand, are generally bought through Woolworths (Economist Intelligence Unit 1980) but are available in most department stores too. Some retail outlets only stock certain items, for example Boots plc, a store which is also notable because market researchers are not allowed access to audit their stocks.

Secondly, many Garden products have a low penetration, that is to say they are bought by few consumers. This can cause problems in consumer sampling, and is complicated by the very low purchase frequency of some products. For example, a major survey (Schlackman 1979) of two thousand consumers showed that for over half the seventy-four products surveyed less than forty purchases were recorded. These factors may require market researchers to use larger

samples than in less fragmented markets causing the research costs to rise.

One final problem of researching the garden market is the definition of the product markets. Except where information is required at brand level (which is, of course, expensive) managers need to be given data in acceptable product groups. At the time the project began the Council felt that no acceptable classification of products had been defined.

These issues are considered later in the thesis. Our attention initially focusses on the literature related to the feasibility of co-operative market research.

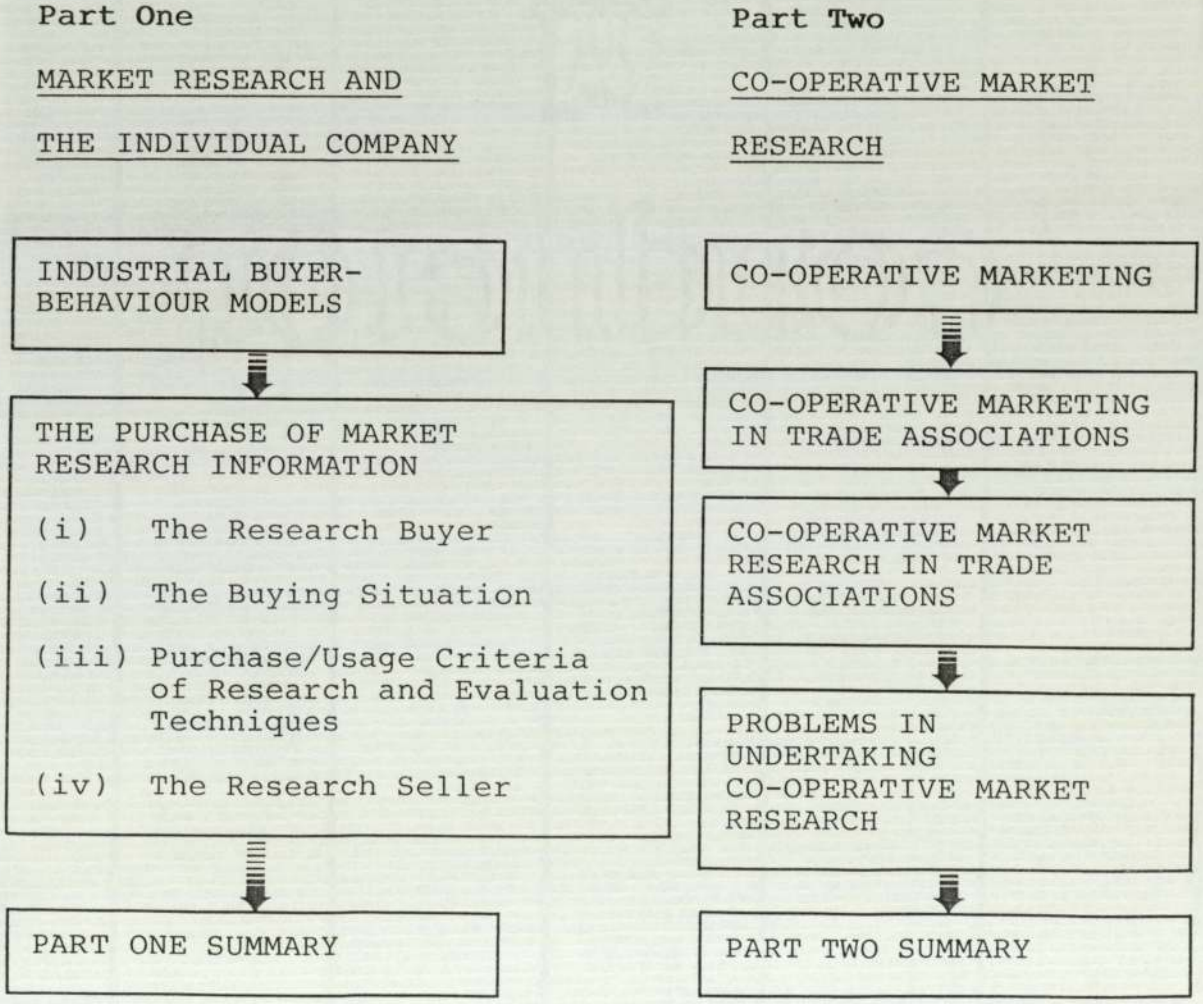
CHAPTER TWO

LITERATURE REVIEW

This literature review is divided into two parts (Figure 1). The first considers market research for the individual company and relates the factors affecting its purchase to a buyer-behaviour framework.

The second section considers co-operative marketing and, in particular, the problems of setting up co-operative market research activities in trade associations.

Figure 1: A Schematic View of the Literature



PART ONE

MARKET RESEARCH AND THE INDIVIDUAL COMPANY

One definition of market research which this author has compiled to encompass the major themes found in the literature is:

> "The systematic gathering, analysis and interpretation of information to help managers understand their environment, identify problems and opportunities, and develop and evaluate alternative courses of action."

Market research can be thought of as a commodity being exchanged between buyers and sellers (Deshpande and Zaltman 1982) and, since most research is done for organisations rather than individuals (Channon 1968), the purchase of market research is considered here within an organisational buyer-behaviour framework.

A brief review of some major buyer-behaviour models introduces the factors affecting industrial purchases and may help our understanding of the purchase of research information.

Both general and specific models are considered.

2.1 INDUSTRIAL BUYER-BEHAVIOUR MODELS

2.1.1 General Models

Webster and Wind (1972a) suggested that industrial buying is a decision-making process carried out by individuals (level 1) in interaction with other people (level 2). This interaction (called the buying centre) occurs in the context of a formal organisation (level 3) which, itself, is influenced by a variety of environmental factors (level 4). Within each level the authors identified "task"

(economic) variables which directly relate to the buying problem and "non-task" (psychological) variables which extend beyond it.

Sheth (1973), who offered a slightly different model of industrial buying behaviour suggested that task variables could be product or company specific. He also noted the importance of situational factors.

These general models outline the major influences on the industrial-buying process but suffer from a lack of quantification of the task and non-task variables. They are, therefore, of little practical use when trying to predict organisational buying-behaviour (Commander 1978).

2.1.2 Specific Models

(a) THE BUYING CENTRE

The buying centre is a temporary organisational unit (Wind 1978) changing in its components and their functions from one purchase situation to another (Fisher 1969; Cardozo 1980).

One important activity of the seller is identifying key buying influences within the buying centre so that resources may be concentrated on them (Kotler 1980). In many cases the purchasing manager is a key influence (Doyle et al 1979; Lister 1967; and Gronhaug 1977), although this is not always the case (Brand 1962). Robinson and Faris (1967) suggested that the buyers' influence often arises from his role as "gatekeeper" to information about a purchase decision.

(b) THE BUYING SITUATION

Robinson and Faris (ibid) defined the buying process in terms of the buy-grid matrix. By identifying the phase and class of a buyer's decision which form the matrix,

sellers can transmit relevant information about their products and thereby increase the likelihood of their products' sale (Cardozo 1980).

Cardozo suggested that four dimensions of the buying situation were important in affecting industrial purchases (Table 1).

Table 1: A Four-Dimensional Classification of Buying Situations (Cardozo 1980)

DIMENSION	SUB-FACTORS
BUYERS' FAMILIARITY WITH THE BUYING TASK	New task Modified Rebuy Straight Rebuy
PRODUCT TYPE	Product Use Degree of Standardisation
IMPORTANCE OF PURCHASE TO THE BUYING ORGANISATION (RISK)	Exposure to Loss Uncertainty
PRINCIPAL TYPE OF UNCERTAINTY PRESENT	Need Uncertainty Technical Uncertainty Market Uncertainty Acceptance Uncertainty Transaction Uncertainty

These were the buyer's familiarity with the buying situation, the product type, the importance of the purchase and the presence of uncertainty. Cardozo analysed their significance in terms of their affect on vendors' marketing costs. Concerning the first dimension, he suggested that sellers interested in obtaining business from buyers who are unfamiliar with either the product (a

new-task situation) or the supplier (a modified rebuy situation) must be prepared to invest the time necessary to see the customer through the phases of the buying process. In addition, he proposed that the second dimension, product type, may be important for two reasons. Firstly, knowledge of the product's use may help the vendor identify the appropriate contact within the buyers' company. Secondly, the higher revenue earned from selling non-standard, as opposed to standard, products may be outweighted by the greater marketing effort required. In the other two dimensions of the buying situation Cardozo referred to six types of uncertainty. The first concerned the degree of risk involved in making the optimal purchase and the other five related to stages of the buying process from defining a product need to the purchase transaction.

(c) THE BUYER-SELLER INTERACTION

Empirical studies have indicated that the most important factors influencing a buyer's choice of seller are low-price, reputation and information provision (Cardozo and Cagley 1971; Lehmann and O'Shaughnessy 1974). However, since different types of product may be judged on different criteria sellers are well advised to understand them and those by which they, themselves, are judged if they want to maximise their sales potential (Cardozo 1980).

SUMMARY

These models describe organisational buying processes but lack quantification of the variables involved and, therefore, lack utility. However, they suggest that sellers of industrial products can maximise their potential sales, by identifying:

(a) the key influences within the Buying Centre and factors affecting their purchase decisions,

(b) the buyer's familiarity with the Buying Situation and his uncertainties about it,

(c) the purchase and usage criteria of the product, and,

(d) the criteria by which they, themselves,are judged

Knowledge of these key areas enables the seller to transmit relevant and sufficient information to purchasers of industrial products.

It is hoped that this general understanding of industrial purchase behaviour will add depth to the sparse literature concerning the purchase of market research information. One general note about this literature, which is described in the following sections, is its bias towards the activities of large American consumer-goods companies.

2.2 The Purchase of Market Research Information

Whereas industrial product purchases are generally defined by precise specifications the product of market research information is often more difficult to define. Managers may buy market research because they expect it to reduce uncertainties in their decision making (Krum 1968; Deshpande 1982) and thereby make decisions more profitable (O'Dell 1968; Enis and Cox 1972).

Although there is evidence to suggest that successfully innovative companies possess a better understanding of their consumers' needs than other companies (Saren 1980; Peters and Waterman 1982) the relationship may not be causal since Davidson (1972) showed that product failures

may have the benefit of just as much market research as the successes.

In considering the purchase of industrial goods it was suggested that an important, and perhaps primary, activity of the seller was to identify the key buying influences within the buying organisation and the factors affecting their purchase decisions. These factors stem from the buyer himself, the buying situation, the product and the research seller (Sheth 1973).

2.2.1 The Research Buyer

In terms of market research purchases the buying centre comprises the buyer, the user and other personnel involved in the decision to purchase information. There is little evidence concerning the roles of these buying centre participants and most surveys confine themselves to in-company research where the 'buyer' is usually the research user. As with industrial purchases the research buyer appears to be influenced by environmental, organisational, interpersonal and individual factors and within these by task and non-task variables (Lawton 1976).

(a) ENVIRONMENTAL INFLUENCES

Kotler (1980) suggested that three environmental influences have increased the need for market research information. These are:

(1) the development of international markets,

(2) increased emphasis on satisfying consumer wants, and

(3) greater use of non-price competition.

Some ad hoc effects, like recession, may also affect market research purchases; the indications being that the effects are stimulatory (Simmons 1982; Economists

Advisory Group 1983). Other positive effects may arise from the type of industry, since, the major research purchasers are in the fast-moving competitive industries (Lawton 1976). Recent studies of American corporations (Twedt 1973 and 1978) show that although companies in the more rapidly changing consumer markets benefit from more research than do industrial firms their actual research activities are very similar (Table 2).

Table 2: The Most Frequently Undertaken Research Activities by Consumer and Industrial Companies

RESEARCH ACTIVITY	% UNDERTAKING ACTIVITY	
	Consumer	Industrial
Short Range Forecasting	90	98
Long Range Forecasting	87	96
Studies of Business Trends	79	97
Pricing Studies	88	93
New Product Acceptance and Potential	94	93
Competitive Product Studies	93	95
Testing of Existing Products	95	84
Measurement of Market Potentials	97	97
Market Share Analyses	96	97
Determination of Market Characteristics	92	97
Sales Analyses	96	97
Established Sales Quotas, Territories	91	95

Source: Twedt, Survey of Marketing Research, 1978, p41

Connell et al (1982) recently suggested that consumer and industrial companies share the need for market size and trends and that the collection of such data would be a growth sector in the Market Research Industry.

(b) ORGANISATIONAL INFLUENCES

Company size and structure may also have an effect on research purchase and use. Small companies, although needing research (Davies 1977; Frantz 1978; McCracken 1980), spend proportionally less money on it than large companies (Twedt 1978).

The under-achievement of research in small businesses is generally attributed to either a lack of resources or unfavourable management attitudes towards research. Typically small firms lack:

(a) experienced marketing people (Sood 1980),

(b) time available to collect and use research (Davies 1977), and

(c) funds (American Management Association 1957).

Small businessmen also regard research less favourably than managers from larger companies (Bellenger 1979), a product, perhaps, of their lack of training and experience of it (ibid).

In terms of company structure, Keane (1969) and Deshpande (1982) agreed that the decentralisation of decision-making authority and deformalisation of company activities encouraged research use. Interestingly, Sheth (1973) also noted the importance of the organisation's size and degree of centralisation in his model of industrial buying behaviour.

(c) INTERPERSONAL INFLUENCES

One particular interpersonal relationship - that between

decision makers and their company's salesmen - may significantly influence the purchase of market research information. The credence managers give to salesmen's interpretations of the market may affect how much research information is bought from external sources.

Indications from market researchers are that information from sales representatives is inadequate (Crimp 1981), biased and inaccurate (Simmons 1980). Managers may, of course, think otherwise.

Channon (1968) suggested that because the client of research is a coalition, research is needed not only for the group to make better decisions but also to formalise their common processes. He suggested four types of formalisation:

(a) research as common ground,

(b) research as a collective memory,

(c) research as a stabilising factor, and

(d) research as reassurance.

These, he said, aided the decision-making process and, therefore, were rational uses of research. This may be particularly true of the first type of formalisation since so many authors support the use of research in conciliation (O'Dell 1968; Samuels 1973; Ramond 1974). The non-rational functions of research listed in Table 3 may also affect research purchases (e.g. Piercy 1982) and can perhaps be equated to the non-task variables of industrial situations.

Table 3: Some Non-Rational Functions of Market Research

LEVEL OF INFLUENCE	RATIONALE BEHIND RESEARCH PROJECTS (NON-RATIONAL FUNCTIONS)	AUTHOR
ORGANISATION	Support or enhancement of market research department	de Koning 1966 Deshpande 1980
	Support of the organisational system	Bernstein 1975 May 1981
INTER-PERSONAL	Promotion of ideas to higher management,	May 1981
	Justification of decisions already made	de Koning 1966 Hardin 1969
INDIVIDUAL	Confirmation of decisions already made,	Bernstein 1975
	Replacement of own judgement particularly in innovation	May 1981 King 1983
	Delay in making decisions,	Samuels 1973
	Enhancement of own position	de Koning 1966

(d) INDIVIDUAL INFLUENCES

Before considering the interaction between managers and research it would be useful to understand something of management decision-making.

It has been suggested that managers create a simplified, idiosyncratic conceptualisation or model of a problem situation in order to reduce the complexity of decision making (Lawton 1976). Managers also try to interpret information so that it is consistent with their existing beliefs and if they fail in doing this they will attempt to avoid it (theory of cognitive dissonance; Festinger 1957).

Therefore, if research results disagree with a manager's prejudgements of a problem situation their use can be significantly affected (Hardin 1969). This effect can occur on two levels; the initial reception and the final interpretation of information (Lawton 1976). The initial reception of information can be influenced by a manager's:

(a) fear that purchasing research implies incompetence (O'Dell 1968),

(b) fear that his 'knowledge' will be proved wrong (Newman 1962), and

(c) difficulty in replacing his intuition with research (Deshpande 1980).

Concerning the acceptance and interpretation of research we have already noted the influence of managers' prejudgements. Another important factor is how fixed and resistant to change these prejudgements are (Cardozo et al 1972).

Some authors suggest that, because of the cognitive dissonance phenomenon, managers feel more comfortable with conservative research (Kover 1976), and prefer slightly confirmatory results with a low surprise content (Deshpande 1980). Deshpande (ibid) suggested that surprise increased uncertainty which implied increased risk - ironically the very thing research was trying to diminish. He recommended that researchers can reduce surprise by generating the various outcomes of research before it is undertaken (Deshpande 1982). Other factors affecting managers' attitudes towards research include their personal characteristics like education, age, intelligence, and experience (Starbuck and Bass 1967). One survey indicated that managers felt market research

techniques were too technical to be of use to them (Bellenger 1979) perhaps indicating that not understanding the research methodology makes results difficult to accept. A manager's position in a company may also be important since research is most beneficial to the strategic planners in top management (Bellenger 1979).

Surveys have shown that although managers generally hold favourable attitudes towards buying research they do not use it consistently in their decision making (Krum 1969; Bellenger 1979). It seems reasonable to assume that the non-rational functions of research have some effect here (Table 3). Deshpande (1980) proposed that one of the most important ways of increasing research utilisation was by improving the interaction between managers and researchers. As considered later (Table 4) managers have been reluctant to involve researchers in their decision making, but a recent survey (Simmons 1982) has indicated that managers may be changing their attitudes.

SUMMARY

As with industrial purchasers, buyers of research information are influenced by environmental, organisational, interpersonal and personal factors and within each of these levels by rational and non-rational functions of research. These functions are analogous to the task and non-task variables thought to affect the purchase of industrial goods.

Perhaps the first tasks of the research seller are to identify the key influences within the buying organisation and then assess the factors likely to affect their purchase decisions. In particular, managers may, because of its reflection on themselves, be unreceptive to

research, interpret it to fit in with their preconceptions or reject it. An important factor here is the manager's experience of research and, therefore, his familiarity with the buying situation. It was noted earlier that the buying situation is important in influencing purchases of industrial products. It may also have an effect on the purchase of market research information.

2.2.2 The Buying Situation

Table 1 showed four dimensions of industrial buying situations:

(1) the buyer's familiarity with the buying task,

(2) the product type,

(3) the importance of the purchase to the buying organisation (risk), and

(4) the principal type of uncertainty involved.

Although only briefly considered by the market research literature one experiment has shown the importance of the first three dimensions (Cardozo et al 1972).

The experiment simulated a new product introduction and showed that (1) managers bought information with which they had frequent and favourable experiences, (2) the type of information bought varied in the different phases of the decision-making process, and (3) managers favouring introduction acquired more information and processed it more than managers favouring a 'no-go' (low risk) decision.

The lack of any evidence of the fourth dimension - uncertainty types - may be because of the experimental conditions. For example, all the subjects were experienced research users (diminishing "need" and perhaps "technical" uncertainties) and the research used was

supplied by a computer (diminishing "market acceptance" and "transaction" uncertainties). Despite these experimental conditions this study indicated some influences of the research-purchase situation.

Other evidence comes from the Information Systems field where it has been suggested (McFarlan 1981) that the acceptance of a system depends on:

(a) a manager's familiarity with it,

(b) its cost and the number of departments involved, and

(c) the accurate estimation of its technical performance.

These factors have a number of analogies both with the previous experiment and with the industrial buyer-behaviour literature.

SUMMARY

Although relatively few authors have tackled the importance of the situation surrounding market research purchases, it appears that the dimensions of industrial buying situations are relevant here.

The sellers of market research, therefore, need not only to identify the key buying influences but also to assess their familiarity with the buying situation and allay any uncertainties they have about it.

However, uncertainties may not only arise from the buying situation and particularly managers who are inexperienced in using market research may be uncertain as to what research they need and how it might be used.

2.2.3 Purchase and Usage Criteria of Research

In industrial situations the definition of the job to be done often specifies the nature of the product required.

The purchase of market research, however, seldom has only one objective (Deshpande 1982) and often the problems to be solved and the research required are difficult to define exactly. In assessing whether to buy market research, decision makers consider certain research characteristics which are positively associated with its usefulness (Weiss and Bucuvalas 1978).

The most comprehensive statement of what defines the usefulness of information comes from Snavely (1967) who recommended six criteria for accounting information. King and Epstein (1976) have more recently used these criteria to define market research information. They are:

(a) Relevance,

(b) Reliability,

(c) Understandability,

(d) Significance,

(e) Sufficiency, and

(f) Practicality.

(a) RELEVANCE

The relevance of research to a decision depends on whether the researcher has accurately assessed the nature of the problem. Research has shown (Deshpande 1980) that incorrect problem definition is one of the major factors affecting research use.

(b) RELIABILITY

Reliability is a measure of the consistency of research results over time whilst validity is a measure of how closely the results reflect reality. Reliability and validity together define the quality of research (Kurtulus 1978) which plays an important role in the use of research (Deshpande 1982).

(c) UNDERSTANDABILITY

The understandability of research has four determinants (Snavely 1967); quantifiability, consistency, comparability and simplicity.

(i) Quantifiability

Some authors argue that managers are concerned about the confidence they can place on qualitative data (O'Donoghue 1982; Sharman 1984). It is thought that managers may prefer quantitative data because of the larger samples used and the less dominant role of the researcher in interpreting results. Another explanation for this preference lies in the fact that managers become more personally involved with quantitative research through being able to (a) check the basis of recommendations and (b) communicate its results more easily to others (Cooper and Branthwaite 1978).

(ii) Consistency with User Concepts

The influence of managers' preconceptions on his research purchases has already been considered. What seems to be important is that managers can recognise the picture of the market presented to them by researchers (O'Donoghue 1982).

(iii) Comparability

Snavely (1967) proposed that accounting information was more understandable when it could be compared with similar information concerning other firms or other periods in the same firm. This is also true in the market research field where many writers recommend the collection of both intra-firm and inter-firm (for example, from interfirm comparisons) data. The fact that one interfirm study (the PIMS program) involves over 160 firms (Haas 1982) is

evidence of the importance of information comparability.

(iv) Simplicity

Numerous studies suggest that the greatest need for improvement in research reports concerns their complexity (Bellenger 1979; Simmons 1982). Important factors include report length, presentation and the presence of jargon and ambiguity.

(d) SIGNIFICANCE

Information is significant only if it affects a decision or act of the decision maker (Snavely 1967). Bellenger (1979) stated that although managers exhibit relatively positive attitudes towards market research many do not use it consistently in major decisions. One problem may concern a lack of definite results in reports (ibid) or that researchers, through misunderstanding, recommend non-actionable solutions (Deshpande 1980).

(e) SUFFICIENCY

Useful information possesses a certain quality and quantity (Snavely 1967). The required level of each is determined by the decision(s) to be taken on the basis of it (Blyth 1978) and may change according to the stage of the decision-making process. O'Dell (1968) suggested that the initial stage of problem definition requires less precise data than the terminal selection of a marketing alternative. Empirical evidence supporting this suggestion has shown that managers initially purchase large quantities of various data followed by specific and more expensive information (Cardozo et al 1972).

Obviously, the closer the match between the quality and quantity of the information and what is actually required for the decision, the more efficiently a manager will use

his market research budget.

(f) PRACTICALITY

The final criterion defining useful information is its practicality which is determined by its timeliness and its worth measured against its costs (Snavely 1967).

(i) Timeliness

The timing of research reports has an effect on both the relevance of information (Holbert 1974) and its usability (Deshpande 1982). Surveys indicate that managers generally find the timing of research reports satisfactory (Deshpande 1982; Simmons 1982) but some criticise researchers for lacking a sense of urgency (Keane 1969).

(ii) Worth More than Cost

Although Snavely (1967) specified this criterion as a determinant of usefulness, most writers on the subject of market research agree that comparing the costs and benefits of research is a higher-management priority. It was noted earlier that the main benefit of research is in improving decision profitability and to achieve this research must be useful (e.g. Abrams 1979). Most managers (bearing in mind the bias of the literature towards large companies) appear to be satisfied that market research is worth more than its costs (Bellenger 1979; Deshpande 1982). Very few, however, undertake any formal evaluation of it (Twedt 1975). There are a number of quantitative techniques available to help managers weigh the costs against the benefits of research (Adler and Mayer 1977). Some, for example, the return-on-investment (Twedt 1966) and present value methods (Myers and Samli 1969), evaluate a previous year's research effort. Other methods, ranging in complexity

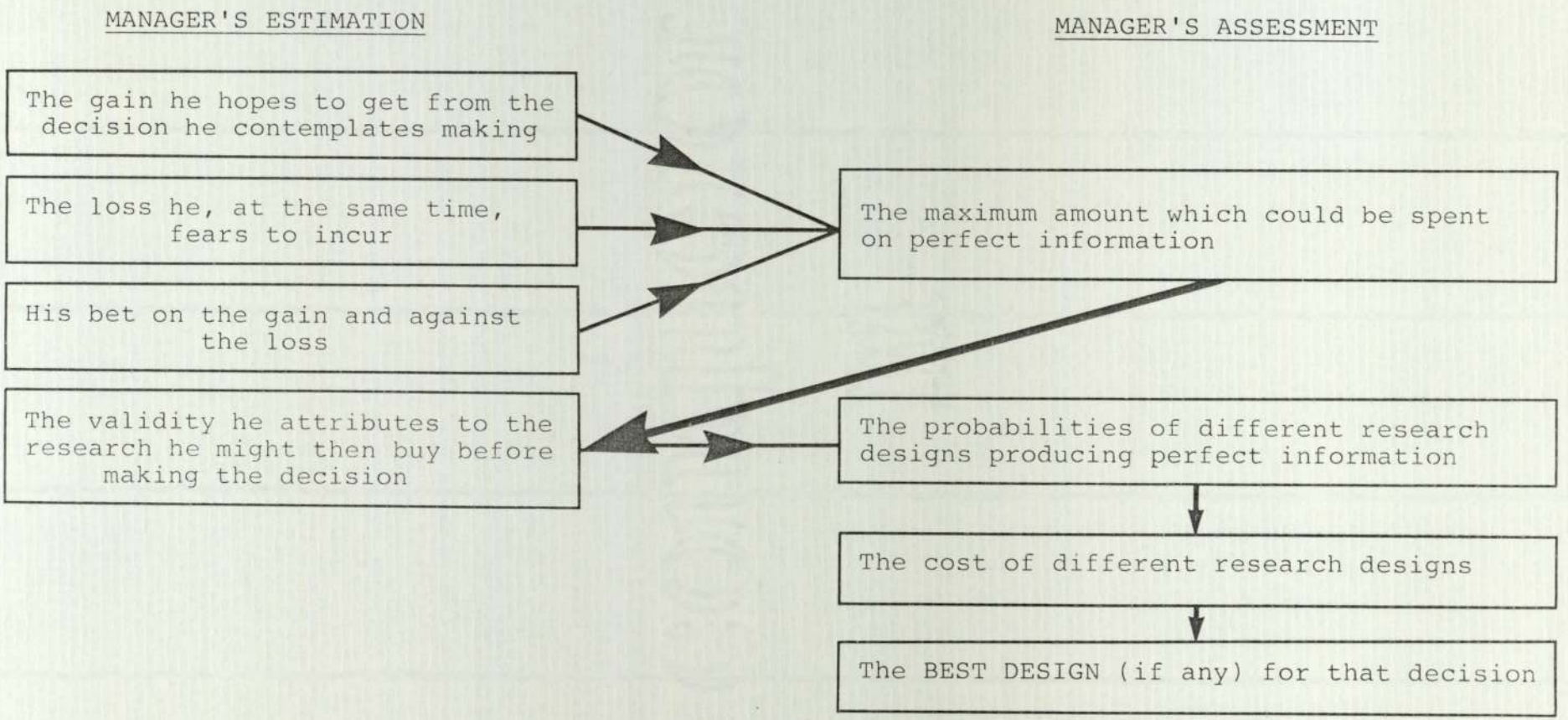
from the simple savings method (Alexander 1966) to the Bayesian Approach (Enis and Broome 1973; Kling and Tia 1978) estimate the expected value of research before it is undertaken. The Bayesian Approach (Figure 2) has been recommended as the best way to determine the expected value of information (Myers and Samli 1969).

The main problems of using the Bayesian, or indeed, any other approach lies in estimating the costs, profit and probabilities surrounding the decision situation. Another problem arises from the fact that market research seldom has only one objective (Deshpande 1982) and so the value of the information to all applicable problems must be determined and summed (Green and Tull 1970). In addition, managers use their own judgement in making decisions thus making it difficult to determine the credit attributable to research. It is even more difficult to evaluate the potential value of future market research expenditures (Day 1966).

The extent of the practical problems involved with these techniques has been shown by a survey of 600 of the largest research departments in America. Only one department reported evaluating market research projects in terms of their specific profit contribution (Twedt 1975).

It is, however, still intuitively desirable that managers make some assessment of research value before it is undertaken (Gandz and Whipple 1977) and perhaps the main contribution of the techniques mentioned is in making explicit some of the factors at play.

Figure 2: A Summary of the Bayesian Approach - A Method Used to Determine the Expected Value of Information



SUMMARY

In assessing whether to purchase market research information decision makers consider a number of attributes of research which define its potential utility. Such attributes include research relevance, reliability, understandability, significance, sufficiency and practicality. The most important consideration is the balance of research benefits and costs and although there are a number of techniques available to help decision makers here, most are of little practical use.

If the literature fails to give managers guidance in their assessments of research's worth, it also fails to help research sellers understand which attributes are of most concern to buyers. Since managers' assessments of research attributes occur before its purchase they will depend to a large extent on their previous experiences and the information provided by the research seller. By understanding managers' purchase and usage criteria sellers can communicate information which is most likely to diminish uncertainties arising from the research itself. The effectiveness of such communication does depend on the receptiveness of the buyer to it, which to some extent will be influenced by the buyers' attitude towards the research company.

2.2.4 The Research Seller

A recent British survey criticised market researchers' understanding of their clients' businesses (Simmons 1982). Many authors suggest that poor understanding of the problem situation stems from the researchers' isolation from the research user (e.g. Lawton 1976). One explanation for this isolation suggests that research

suppliers and users belong to different communities and hold different values and interests (Deshpande 1982). Many of these differences are listed in Table 4.

Suggestions for bringing the two groups closer together range from persuading a client's Board member to promote research (de Koning 1966) - rather like an "Innovation Champion" role - to making researchers more decision oriented (Holbert 1974).

Keane (1969) and Deshpande (1982) each focussed on a two-way improvement of the situation involving both managers and researchers (Figures 3 and 4).

Figure 3: Responsibilities of Managers and Market Researchers in Improving Research Services (Keane 1969)

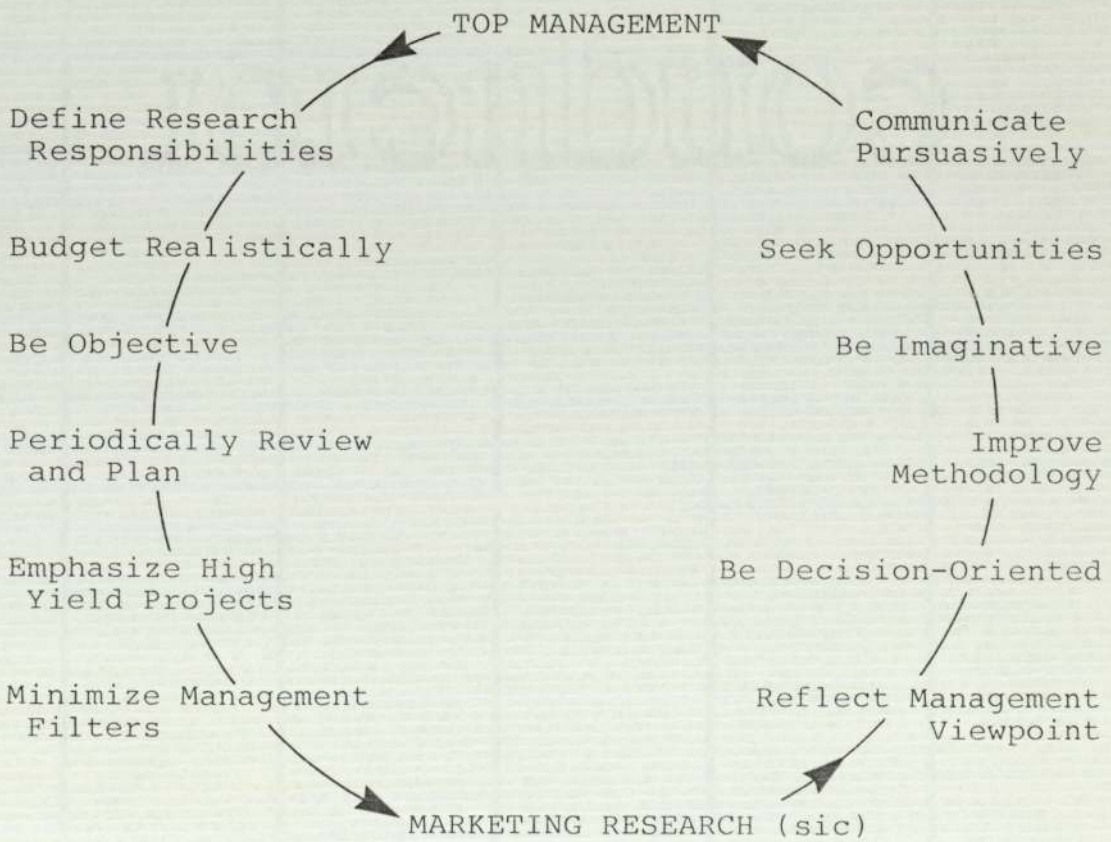
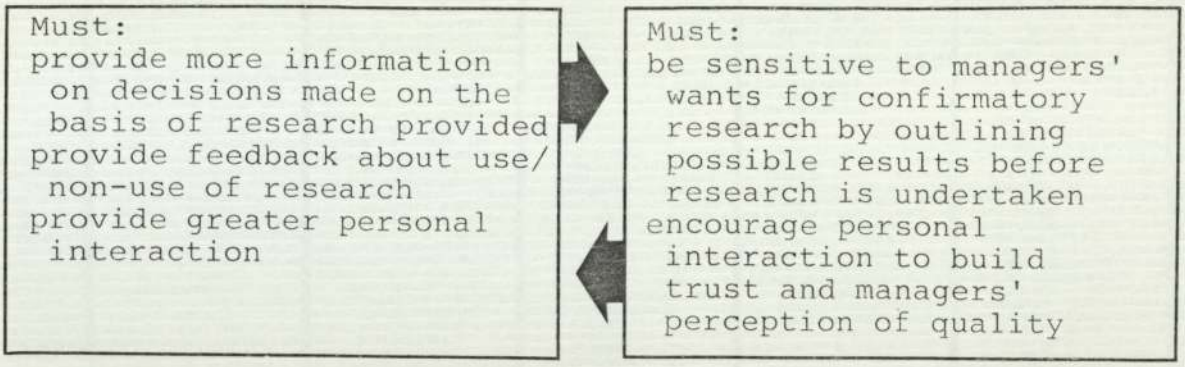


Table 4: Factors Causing Isolation of Market Researchers From Research Users

FACTOR CAUSING ISOLATION	AUTHOR
Differences between the Communities	
Risk-taking capacity	de Koning (1966)
Speed and depth of analysis in decision-making	
Ways of thinking	Wottawa (1982)
Cognitive style in thinking	McKenney and Keen (1974)
Management Community	
Misconceptions about market research	Andreasen (1983)
Limited training & experience of market research	Newman (1962)
Limited ability to interpret results	Davis (1965)
Limited capacity to learn and solve problems	Lawton (1976)
Over optimism about results	May (1981)
Over optimism about researchers' capabilities	Methven (1978)
Suspicion of researchers desire for greater involvement in decision making	Hopkins (1974)
Critical of researchers' lack of action-orientation	O'Donoghue (1982)
Researcher Community	
Confusion over responsibilities and involvement in decision making	Deshpande (1980)
Misunderstanding of the client's problem situation	Holbert (1974)
Lack of interpretation of results	Palmer (1974)
Lack of marketing knowledge	Simmons (1978)

Figure 4: Two-Way Improvement in Manager-Researcher Communication (Deshpande 1982)



The importance of buyer-seller interactions in the purchase/use of research have also been noted by Haynes and Rothe (1974). In their study 159 research managers were asked to rate twelve factors according to their importance in attracting business (Table 5). Unfortunately there is no evidence concerning the corresponding attitudes of research buyers.

Table 5: Factors Important in Obtaining Research Business (Haynes and Rothe 1974)

FACTOR	RANK
Quality of work	1
Understanding of the client's problem	2
Reputation	3
Professional integrity	4
Experience	5
Referrals from satisfied clients	6
Personality of key personnel	7
Individuals who will work on project	8
Firm specialization	9
Personal contact (solicitation)	10
Price	11
Advertising	12

Compared to many industrial purchases (Lehmann and O'Shaughnessy 1974) researchers considered price to be a relatively unimportant determinant of business. Haynes and Rothe (1974) suggested that both buyers and suppliers realised research was not a commodity but "an intangible, differentiated service that cannot be compared or purchased on a price-only basis" (p70). Price, they said, was but a limiting factor or determinant of contestants rather than a decisive or exclusive competitive tool. They concluded that, instead of concentrating on price competition, research suppliers aimed to reduce three uncertainties:

(1) knowing with whom to deal,

(2) the nature of the problem at hand, and

(3) the best research approach.

It is interesting that these three uncertainties are very similar to the market, need and technical uncertainties expounded by Cardozo (1980) for industrial buying situations. The methods of reducing these uncertainties suggested by Haynes and Rothe (1974) - developing experience, work quality and client-problem understanding - also bear close resemblances to those suggested for industrial situations (Cardozo 1980).

SUMMARY

The choice of information supplier may depend on how well each of them is able to decrease uncertainties felt by research buyers. Many of the ways of reducing these uncertainties depend on closer co-operation between the two parties. A recent survey of British marketers has suggested that they are keen for researchers to adopt a more active role in policy formulation and research

initiation (Simmons 1982). Perhaps this heralds a new initiative to close the gap between the users and suppliers of research.

2.3 SUMMARY OF PART ONE: MARKET RESEARCH AND THE INDIVIDUAL COMPANY

This section has developed the idea that market research can be likened to the exchange of industrial products between buyers within an organisation and sellers. By understanding buyers' behaviour, sellers of both industrial products and research information can maximise their potential sales by transmiting relevant and sufficient information about their products.

One difference between the purchase of these two types of product arises from the fact that whereas a particular job often specifies the requirement for an industrial product, the reasons for purchasing market research can be less clear-cut. It may, therefore, be more difficult for research sellers (as opposed to industrial sellers) to comprehend buyers' behaviour.

Models of industrial buyer behaviour suggest four areas of influence. These are:

(a) buyers' familiarity with the buying situation and their uncertainties about it,

(b) environmental, organisational and interpersonal factors affecting the buyers' decision,

(c) products' purchase and usage criteria, and

(d) buyers' criteria for selecting sellers.

These influences are also relevant to market research purchases but for both types of purchase the literature fails to quantify to relative importance of the factors at

play.

The literature also fails to explain how sellers achieve an understanding of buyers' behaviour. It seems reasonable to assume that the apparent moves towards increasing the interaction between buyers and sellers will serve to reduce uncertainty and encourage better understanding.

PART TWO

CO-OPERATIVE MARKET RESEARCH

Part two of the literature considers the more complex situations surrounding co-operative market research ventures and, in particular, those involving trade associations.

Initially it is useful to consider co-operative marketing practices generally.

2.4 CO-OPERATIVE MARKETING

Co-operative marketing occurs where several individuals, companies or co-operatives come together to share some or all of their marketing and distribution activities, sometimes in conjunction with Government or trade bodies (Economists Advisory Group, 1983).

A recent report (ibid) pointed out that, despite recession increasing awareness of the need to collaborate, Britain had only 400 compared to Italy's 80,000 marketing co-operatives. Reasons for this may include the strong independence of small British firms (Golby and Johns 1971), their reluctance to change established marketing

methods and their mistrust of other enterprises. British firms also appear to be ignorant of the benefits of co-operation; a situation not aided by the Government's lack of support for co-operative ventures (E.A.G. 1983). Based on experience from the agricultural sector, the E.A.G. report proposed a number of "criteria" which determine the successful implementation of co-operative marketing (Figure 5).

Figure 5: Criteria Which Determine Successful Implementation of Co-operative Marketing

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- Direct participation by the members
- Specified financial commitment from the members proportionate to trade
- Specified time agreement from the members
  - 3 years for a managerial salary
  - 5 years for buildings and fixed investment
- Not to undercharge for services
- Mutual trust and confidence
- Concentration of decision-making among the producers in whose interest the co-operation is run
- Targeted market research and promotion based on the needs of members
- Government or third party promotion of co-operative marketing.

Source: Economists Advisory Group, Marketing and Joint Trading for Small Firms, 1983, p54

2.5 CO-OPERATIVE MARKETING IN TRADE ASSOCIATIONS

By definition trade associations pursue a form of co-operative marketing on behalf of their members. A trade association is defined as:

"A body of persons formed for the purpose of furthering the trade interest of its members or persons represented by its members"
(Restrictive Trade Practices Act 1976)

Trade associations emerged around the early 1800's and up to the First World War many were involved in controlling competition and labour problems (Political and Economic Planning 1957). Between the Wars economic depression encouraged the growth of associations which, through price-fixing, aimed to control imports and protect the home industries (Hyman 1970). The outlaw of such practices in 1956 led to the collapse of some trade bodies but many remained and concentrated increasingly on commerical activities (Hyman 1979). Many British associations now undertake market research activities (Table 6). However, evidence from America suggests that the research services provided by associations may lack depth (Dunham 1971).

The Political and Economic Planning group (1957) showed that associations' activities varied according to:

(1) whether the association represented an industry or a product,

(2) whether the product was industrial or consumer,

(3) the number of members and thus the amount of funds,

(4) whether the aims of the association were representational and/or commercial, and

(5) the degree of inter-member competition in addition to the benefit each sought from joining the group both of which determined their willingness to co-operate.

Table 6: Some Activities of Trade Associations in Britain (Devlin 1972)

ACTIVITY	% UNDERTAKING ACTIVITY
General Advisory or Consultancy Services	89%
Relations with Government	87%
Public Relations	81%
Statistics, Economic and Market Intelligence	80%
Relations with Nationalised bodies	80%
Standardisation	69%
Relations with Local Authorities	61%
Research	43%
Specific Advisory or Consultancy Services	22%

Two factors seem particularly important in limiting associations' co-operative marketing activities. These are their history and institutional framework and the fragmentation of the association network (Economists Advisory Group 1983).

2.5.1 History and Institutional Framework

Associations are uniform neither in size or structure nor in their development of marketing activities. History and individual personalities play important roles here as do the internal politics. One report, for example, cited a case where the employment of a joint agent had failed because only certain members had been involved. The study concluded:

> "It seems that trade associations cannot afford to become too involved in commercial activities or to show favour to certain firms for fear of losing members."
> (Economists Advisory Group, 1983, p124)

The same report also suggested that in vertically integrated associations members felt less threatened by direct competition and were, therefore, more willing to co-operate in activities. In addition, where associations represent one product the economic advantages of joint promotion can encourage co-operative activities.

2.5.2 The Fragmentation of Trade Associations

The main uniting force in associations is a similarity of products (Political and Economic Planning 1957). Despite this, however, firms may look to different associations because they differ in other key characteristics - size, age, regional outlook or degree of conservatism. These characteristics (or "centrifugal forces") tend to divide and fragment associations (ibid). This induces low levels of participation in associations generally (Economists Advisory Group 1983) and produces a large number of small bodies with limited funds for co-operative marketing schemes (Bolton 1971). In addition, fragmentation causes duplication of effort in many industries (Economic Development Committee 1967; CBI 1966; Devlin 1972).

Another centrifugal force arises when associations stagnate and fail to serve the needs of their members or potential members (Dunham 1971). Associations must gain a better understanding of their members needs (Kotler 1982) and provide special, tangible and practical satisfactions to retain existing, and attract new, members (Hyman 1979). Evidence of the consequence of not fulfilling members'

needs was shown by the collapse of the central confederation in the Mechanical Engineering Industry (Institute of Mechanical Engineers, Personal Communication 1982).

2.6 Co-operative Market Research in Trade Associations

Despite the factors limiting co-operative marketing activities many bodies, including trade associations, provide market research services (Dunham 1971).

There are four main areas of co-operative research activity in trade associations (Kapferer and Disch 1964). These are:

(a) interfirm comparisons,

(b) secondary data collection,

(c) market surveys, and

(d) forecasting.

2.6.1 Interfirm Comparisons

An interfirm comparison involves the regular collection of company data to form a moving industry total and enables the individual firm to assess its performance in the light of the industry's as a whole. The interfirm comparison is undoubtedly the most frequently undertaken research activity by trade associations and may involve the collection of data on a variety of subjects (Hyman 1970). Most information, which may vary from labour productivity to market share measures, is collected annually and is generally analysed by association staff (Economic Development Committee 1967).

According to Luck et al (1974) the number of associations undertaking Comparisons has grown because of the great expense of audit and panel data combined with a need for

market share analysis. Certainly, in America, the use of market share analysis in individual companies is widespread and has been increasing (Twedt 1978).

Although it has been suggested that interfirm comparisons should be the first market research service offered by trade associations (Crisp 1957), there are situations when it is not useful to collect members' data (Kapferer and Disch 1964). These situations occur when:

(a) the participators in an interfirm comparison account for such a small part of a market sector that estimates of the remaining part are unreliable,

(b) the details of the information to be provided cannot be agreed, for example, companies each requiring different breakdowns of information,

(c) there are only one or two manufacturers in a particular product sector and the analysis enables participators to pinpoint the other company's figures,

(d) some companies do not maintain statistics on the information sought, and

(e) the participators are concerned as to the confidentiality with which their figures will be treated.

Concerning companies' inability to provide the required data, Kapferer and Disch (1964) suggested that associations should encourage members to collect data relating to their joint needs. In addition, concerns over confidentiality may be reduced by using accountants or solicitors, some of whom specialise in interfirm comparison analysis.

2.6.2 Secondary Data Collection

Stimulated by Wartime co-operation with Industry, the Government began collecting statistics in certain market sectors (Political and Economic Planning 1957). Although the aggregation and presentation of the data are often not the most useful to Industry the collection of official statistics can offer valuable background data (Wage 1961). Indeed, their collection by trade associations is said to be as common as that of members statistics (Fournis 1961). Government data, however, forms only part of a wide range of information available to associations. Crimp (1981) offers a useful guide to British sources.

Wortman (1976) suggested that in Industries where secondary data are not available, data from other related sectors could be used to reflect the required market trends.

2.6.3 Market Surveys

According to Crisp (1957) following the basic steps to undertake an interfirm comparison (and after some considerable time) a trade association may embark on a market survey. He suggested that this step was considerably more difficult than the first, since:

> "there are a great many participating companies, each contributing to the cost of the research and each desiring a voice in the direction and emphasis of the project" (p727).

In fact, the willingness of each participant to commit financial support may depend on how closely the research relates to his products and processes (Johnson 1973).

Kapferer and Disch (1964) considered a number of possible areas for market surveys.

(a) Demand
(b) Product
(c) Marketing channels
(d) Sales promotion
(e) Marketing costs
(f) Competition
(g) Forecasts

They suggested that such research should produce a general picture of the market, the procuring of specific product or company data being a matter for the member firm. The collection of such basic data not only encourages greater efficiency in firms' marketing (Kapferer and Disch 1964) but may create less jealousy between competitors than more specific data (Johnson 1973). In addition, its collection may be recommended because of its acceptability to all levels of management sophistication (Cox and Good 1967).

Many authors not only recommend trade associations to collect basic data for their members but also to collect it on a trend basis (e.g. Retornaz 1961). The evidence suggests that despite the greater accuracy of continuous data collection (Haley and Gatty 1968; Aaker and Day 1980) twice as many associations undertake irregular surveys as regular ones (Fournis 1961). Also, there are few examples of continuous research services involving consumer panels and retail audits despite indications that trade associations can use any research technique as a basis for co-operaive market research (Crisp 1957). This implies that associations tend to use the less complex, low cost research methods as a basis for their services.

2.6.4 Forecasting

Kapferer and Disch (1964) considered market research to be a preliminary step to forecasting and they recommended trade associations to produce one of two types of forecast depending on the type of market. In a consumer market

they suggested that the number of consumers, their purchasing power and their expenditure on different needs should be forecast. However, in an industrial market, they thought associations should predict the production or turnover of the industrial purchasers.

2.7 PROBLEMS IN UNDERTAKING CO-OPERATIVE MARKET RESEARCH

The literature describes four problems facing trade associations who wish to undertake market research for their members. They concern:

(1) recognising the need for a research service,

(2) competition between members,

(3) what advice should be given to members and who should give it, and

(4) funds and funding.

2.7.1 Need Recognition

Figure 5 indicated that one of the conditions for successful co-operative marketing is that it involves market research which is based on the needs of the members involved. Smith (1961) suggested that:

> "perhaps the first Market Research responsibility of the trade association is to make a Market Research of its members in order to determine and make a list of those problems that are of common concern". (p12)

Although giving no specific guidelines, Crisp (1957) and Kapferer and Disch (1964) thought that the best method of doing this was by a committee which sought to underline the important areas which needed researching. The next step would be an evaluation of the secondary data available and the association's ability to obtain any additional data by itself. There is evidence to show that when most trade associations undertake market research

services it is on the initiative of associations' staff (Fournis 1961; Felgate 1982) not by a process of researching members' needs. Rautkyla (1980) suggested that this lack of management participation or attention to determining members' needs were only two of the problems associated with information systems' design. One further problem, he said, concerned the need to quantify the potential benefits of different methods of satisfying information needs.

2.7.2 Inter-Member Competition

Another factor affecting trade associations' co-operative activities is the influence of inter-member competition on their willingness to co-operate. The European Productivity Agency (1956) suggested that for joint market research ventures companies' products or services should be complementary but that in highly competitive branches of industry such projects were less practicable.

It appears from what has been said before that associations can minimize the effects of inter-member competition by (1) providing basic data and (2) providing it for everyone.

2.7.3 Advice

Kapferer and Disch (1964) recommended that right from the initial thought of an association setting up a co-operative market research scheme the members should be involved. This involvement, they said, would begin with a general promotion of the idea and be extended to a series of lectures on research use. On implementation of a service the authors warned that members should not be overloaded with too much material but that explanatory documents accompanying statistical reports would be very

useful. Although not explicit in their instructions it seems reasonable to presume that a close understanding of each member's needs is essential to prevent overloading them with too much, or the wrong, information. Willsmore (1950) thought that the failure to deal with the difficulties of educating/advising members constituted the greatest weakness of co-operative research associations.

The two main problems concern knowing what advice to give to members and who should give it (Kapferer and Disch 1964). Members differ in their needs for advice as they differ in their needs for research and, although there is no evidence to suggest large and small firms differ on the latter point, small firms may need more assistance in understandng and applying research (Johnson 1973; Hyman 1970). In order to cope with members' various needs for advice some associations have set up consultancy services. One study (Economic Development Committee 1967) indicated that one-seventh of the distributive associations undertook such services, their quality ranging from a general enquiry service to an advice centre employing eleven staff.

The problem of who should give such advice has been tackled in many ways (Kapferer and Disch 1964). An association may try to set up a service involving its members' staff or by expanding its own staff. However, because of association's principles of neutrality and of the common utility of research data it is sometimes better to set the research function apart from the association (ibid). This might be done either by the formation of a Market Research Institute or by co-operation with a research agency.

Fournis (1961) in his study of European trade associations predicted an increase in the collaboration between associations and market research firms. At the time of his study, 43% of associations were doing their own surveys as opposed to 24% using outside bodies. His prediction was based on the fact the associations did not want to accept responsibility for training their members in market research methods.

Whatever the sources of advice associations must communicate constantly with their members to inform them of their activities. This is essential to ensure the utilisation of services and to create favourable attitudes towards the association. These are both important factors in raising additional revenue for research from the membership (Opinion Research Corporation 1972).

2.7.4 Funds and Funding

The final problem trade associations face in undertaking research services concerns their funding. It has already been suggested that successful co-operative marketing in agriculture may be determined by the specification of financial and time agreements and an adequate charge for services being levied according to a co-operator's sales (Figure 5).

Kapferer and Disch (1964), although expressing no opinion about their likely success, suggested three other methods of paying for market research projects. These included:

(1) introducing a levy for part of the cost, the rest to be paid by the general budget,

(2) members paying by subscription at an equal share of the expenses, and

(3) members being free to purchase the report if

they wish - the cost being estimated from the probable number of reports to be sold.

If the research service involves members receiving different information the method of payment may be different. Clearly, where additional or special analyses are received by a member they should be required to pay an appropriate and additional sum over and above the others (Kapferer and Disch 1964).

Fournis (1961) showed that 60% of International trade associations paid for market research services from their own funds and only 10% shared the cost among the members. This may be because the association's staff often undertake research without consulting members or may be because of problems in obtaining funds from members. For example, Willsmore (1950) suggested that the smallness of an Industry and members' apathy may prevent money from being forthcoming.

With many associations lacking sufficient funds to pay for research themselves (because of fragmentation) it is perhaps not surprising that funding constitutes one of the main problems of joint market research. One solution may be to encourage inter-association co-operation in research both within one country and across a number of countries (Disch 1961).

2.8 SUMMARY OF PART TWO: CO-OPERATIVE MARKET RESEARCH

In order to compete for members associations must provide differentiated services which are wanted by their memberships, that is to say, they must be more marketing orientated. Co-operative marketing activities may be limited in associations by their history, institutional

framework and lack of funds caused by the fragmentation of the association network.

Despite the fact that any research method may be employed by associations most confine themselves to interfirm comparisons, secondary data collection and ad hoc market surveys. Such activities are usually initiated by association staff with members rarely being consulted about their informational needs. Even having instigated such services, non-utilisation may follow because of poor communication between the association and its membership. There are four main problems in setting up a joint market research service; need recognition, inter-member competition, the advice which should be given to members and funding. Solving these problems involves a programme of communication and feedback from the members about their informational needs and the factors affecting information purchases.

Although useful in identifying possible recipes for success in co-operative ventures the literature does not indicate how members' needs for information should or could be assessed. With associations lacking both specialists in research and the knowledge of who to turn to, the recognition of their members' needs must form one of the most difficult problems for associations.

As potential providers of market research associations also face the problems arising from the individual company purchasing market research data (Part One). They must, therefore, not only assess each members' need for information but also their familiarity with research and their uncertainties about buying it. It has been argued that this can only be achieved through effective

communication between the research buyer (the association member), the research supplier (if separate) and the association itself.

CHAPTER THREE

ASSESSING MANAGERS' NEEDS FOR INFORMATION

The last chapter concluded that, before undertaking co-operative market research, trade associations need to understand their members' information needs. There are a number of ways of determining managers' needs and this chapter begins by reviewing them.

One fundamental characteristic which separates research methods is whether they collect qualitative or quantitative data. In the G.I.M.A. study a qualitative method was initially used to obtain an in-depth examination of managers' needs. This was followed by a quantitative method which attempted to look at all G.I.M.A. members' information requirements. Finally, a new research design was developed to integrate and confirm the findings of the first two stages. The results of the three research techniques were used to build an overall picture of G.I.M.A. managers' needs and this is discussed at the end of the chapter.

3.1 DETERMINING INFORMATION NEEDS

There are two main approaches for determining information needs; Data analysis and Decision analysis. **Data Analysis** involves asking a manager what information he currently receives and what other information is needed. Criticisms of the approach are based on (a) the difficulties some managers have in defining their requirements (Palmer 1974), (b) problems of unfelt needs and (c) the possibility that real needs go unexpressed because the user thinks them unrealistic in terms of his

knowledge of existing systems (Rautkyla 1980).

Ackoff (1967) suggested that, rather than information needs being linked to data sources, managers' decisions should be analysed to determine information relevant for such decisions. In this **Decision analysis** each step of the decision making process is modelled and information requirements are identified from the model. Advantages of this approach lie in the opportunity to learn about extraneous problem areas and in producing only information relevant to the decision. The disadvantages are mostly practical. For example, the information requirements are manager specific and will, therefore, need to be reassessed when a manager changes (Rautkyla 1980). The approach may also be more time consuming than data analysis because each decision area under the responsibility of each manager needs to be modelled.

3.1.1 Expectation of the Approaches

McKenney and Keen (1974) described managers according to their cognitive style. Marketing managers and salesmen were shown to be intuitive thinkers who tend to:

(a) re-define the problem frequently as they proceed,

(b) consider a number of alternative options simultaneously, and

(c) jump from one step in analysis or search to another and back again.

Rautkyla (1980) advised that decision analysis "is hardly much help to an intuitive manager" but that data analysis supported this mode of thinking. Other researchers have agreed with this hypothesis.

Thus for the relatively non-programmed way that marketing decisions are made, data analysis may be preferable to

decision analysis. In addition, where the analysis of a number of managers' decisons is necessary, as in the design of co-operative research systems, data analysis may be the only practical method to use.

3.1.2 Data Analysis Techniques

A variety of techniques have been used to assess managers information needs. For example, Williamson (1981) used a check-list approach which included questions about who required the information and what information was essential and/or desirable. However, such questions fail to encourage the manager to think about his information requirements in the context of his decision responsibilities.

A more directed approach was described by Rautkyla (1980) who recommended managers to make an inventory of their current information flows and discuss each item in their decision making. A similar approach was favoured by Kotler (1980) who used a questionnaire to determine executives' information needs (Table 7). He suggested that an information-planning committee should decide which responses were most important and what executives really need to know. One wonders, however, who tells the "committee" what they need to know.

There are two important advantages of Kotler's approach. This first is the ranking of managers' information needs - albeit in this case by someone other than the manager himself. Decision makers are inclined to approve too many information proposals and since most organisations are constrained in their resources, only a fraction of feasible proposals can be implemented (Rautkyla 1980).

Table 7: Questionnaire for Determining Marketing Information Needs

1. What types of decisions are you regularly called upon to make?
2. What types of information do you need to make these decisions?
3. What types of information do you regularly get?
4. What types of special studies do you periodically request?
5. What types of information would you like to get that you are not now getting?
6. What information would you want daily? weekly? monthly? yearly?
7. What magazines and trade reports would you like to see routed to you on a regular basis?
8. What specific topics would you like to be kept informed of?
9. What types of data-analysis programs would you like to see made available?
10. What do you think would be the four most helpful improvements that could be made in the present marketing information system?

Source: Kotler, P., 1980, p606

It is, therefore, essential to assess the relative value of different research needs. We have already considered (Chapter Two) the theoretical and impractical nature of evaluating information in monetary terms. Most authors, therefore, favour the use of relative rankings based on the perceived importance and frequency of information use. The second advantage of Kotler's approach concerns the efficiency of the questionnaire technique in reaching a large number of decision makers (Table 8). As has been mentioned this is an important consideration in the design of co-operative market research systems.

3.1.3 Problems of Data Analysis Techniques

Three problems are considered here; respondent selection, respondent co-operation and questionnaire design.

Table 8 : Comparative Characteristics of Different Data Collection Methods

CRITERION	MAILED QUESTION-NAIRE	STRUCTURED PERSONAL INTERVIEW	UN-STRUCTURED PERSONAL INTERVIEW	STRUCTURED TELEPHONE INTERVIEW	UN-STRUCTURED TELEPHONE INTERVIEW	OBSERVATION	CONTENT ANALYSIS (DOCUMENTATION)
EFFICIENY							
RESPONDENT COVERAGE	HIGH (low response, missing data)	Fairly HIGH	MODERATE/ LOW (takes longer than structured)	HIGH (subscriber only)	HIGH/ MODERATE	LOW	Usually LOW
USE OF RESOURCES	Very HIGH	MODERATE	MODERATE/ LOW	HIGH	HIGH	LOW	HIGH (if central collection)
EASE OF ACCESS	HIGH (some dislike oversimplification)	MODERATE	MODERATE/ LOW	HIGH	HIGH/ MODERATE	LOW (secrecy)	HIGH (may be only access)
BIAS							
RESPONDENT ANONYMITY	HIGH	LOW	LOW	HIGH	HIGH	LOW	Perhaps HIGH when first produced
FREEDOM FROM BIAS	MODERATE (interpretive +response bias)	LOW (interviewer bias)	LOW	LOW	LOW	HIGH (interpretative bias)	LOW (previous interpretation & availability of sources)
VALIDITY							
FREE FROM PRIOR CONCEPTS	LOW (but written questions)	LOW	Fairly HIGH	LOW	Fairly HIGH	Can be HIGH	Can be HIGH
COMPLEXITY HANDLING	LOW	Fairly LOW	Can be HIGH	LOW	MODERATE	Very HIGH	Depends on quality of material
FLEXIBILITY	LOW	Fairly HIGH	HIGH	MODERATE	Fairly HIGH	Very HIGH	HIGH
SECURING INTERPRET-ATIONS	LOW	MODERATE	HIGH	MODERATE	HIGH	LOW (cannot ask questions)	Often HIGH
DATA ON PROCESSES	LOW	LOW	MODERATE	LOW	MODERATE	HIGH	Can be HIGH
RELIABILITY							
SECURING LONGITUDINAL DATA	MODERATE	MODERATE	LOW (no standardisation)	MODERATE	LOW	HIGH	Usually HIGH (may be only method)
STANDARDISA-TION OF RESPONSES	HIGH (do not know context of responses)	HIGH	LOW	HIGH	LOW	LOW (unless structured)	Usually LOW

RESPONDENT SELECTION

A major concern in using any respondent-questioning technique is the identification of the most appropriate respondents. Ideally one would wish to interview all personnel involved in the purchase and use of research information. However, in the design of co-operative research systems there are potentially too may personnel for this to be feasible.

Earlier we considered the key role of the buyer as a gatekeeper in the purchase of industrial products (Robinson and Faris 1967). One assumes that in the purchase of market research the buyer performs an equally influential role in communicating information and in making the final purchase decision.

RESPONDENT CO-OPERATION AND QUESTIONNAIRE DESIGN

To gain a manager's co-operation, a researcher needs to be able to convince him of the importance and necessity of his research (Kerlinger 1973). This is, perhaps, best achieved through a personal interview in which the researcher can explain and discuss the project with those of whom co-operation is desired (Varble 1973).

Researchers may be wise to concentrate on a small sample of respondents since this can produce a lower proportion of non-response than larger samples (Westerhoven 1978). Other factors, apart from concentration of effort, are also thought to affect response rates. For example, high response rates can be expected if the population is interested in the subject area (Oppenheim 1966) and if the survey is openly sponsored (Scott 1961). Preliminary contact by telephone (Green and Tull 1970), the promise of monetary inducements (Wotruba 1966) and confidentiality

(McKenna 1978) and the follow-up of non-respondents (Scott 1961) may also be important considerations for users of respondent-questioning techniques.

Factors which are particularly linked with mailed questionnaires are:

(a) questionnaire length (Cartwright and Ward 1968)

(b) format and questionnaire layout (Scott 1961)

(c) use of a covering letter (Clausen and Ford 1947)

(d) use of a return envelope (Stamps are preferable to reply envelopes), and (Scott 1961)

(e) timing of the despatch (Dickinson 1982)

The use of any method to question respondents requires researchers to design simple and straightforward questions, eliminate ambiguity, vagueness and jargon and estimate the effects of non-response and respondent self-selection on the results.

The last section showed that there are a number of ways of questioning managers about their information needs each having its own advantages and disadvantages (Table 8). With these in mind Payne (1964) recommended the use of more than one research technique to gain complementary data and collect results more efficiently.

3.2 THE RESEARCH INVESTIGATION

The investigation into G.I.M.A. managers' information needs employed three techniques; the semi-structured interview, the mailed questionnaire and a modified questionnaire design which will be called the "modified delphi technique".

Table 9: The Three-Stage Investigation

STAGE	MAIN OBJECTIVES	METHOD	REASONS FOR CHOICE
STAGE 1 Jan-March 1982 (Sample 12 firms)	To assess current information flows and use and to record suggestions for improvements	Semi-structured Interview	Moderate Efficiency High Validity
STAGE 2 Part One: Sept 1982 (All firms) Part Two: Dec 1982-Jan 1983 (All firms)	To collect company information and assess managers' market research experience To assess information flows for all companies and to identify key areas for research	Self-Administered Questionnaire	High Efficiency Moderate Reliability
STAGE 3 Sept-Jan 1984 (All firms)	To secure longitudinal data and to identify key areas for research and key factors affecting research purchases	"Modified Delphi Technique"	High Efficiency Moderate Reliability High Validity

The aim of the first stage was to gain an in-depth understanding of a few managers' attitudes towards market research. The semi-structured interview technique was, therefore, employed (Table 9). It was then necessary to ascertain all managers requirements for information and this was done effectively by using a self-administered questionnaire. The final stage attempted to integrate the results of the interviews and questionnaires and led to the design of a new technique, the modified delphi technique.

Since the results of each stage moulded the questions of the next, they are considered separately and drawn together to build an overall picture of G.I.M.A. managers'

information needs at the end of the chapter.

3.3 STAGE 1: THE SEMI-STRUCTURED INTERVIEW

3.3.1 Method

Balancing the objectives of this stage (Table 9) and the constraints on resources a sample of twelve companies was considered the optimum number to interview. Companies of differing size, structure and product range were chosen (Chapter Two) to reflect the spectrum of G.I.M.A. managers' market research experiences.

The main research buyer - who had the authority to pay for research expenditures - was indentified and his co-operation secured at the G.I.M.A. Seminar (December 1981). Most buyers were either Heads of Small Business or Marketing/Sales Managers of larger firms.

To minimise interviewer bias managers were intially asked to talk freely about their company and its use of market research. This was defined as:

> "all means by which your company gains information about its markets including all desk research and internal company sources"

a hopefully more understandable form of the definition given in Chapter Two.

A checklist of questions, similar to that used by Kotler (1980) had previously been prepared and was used to cover outstanding points following the free discussion (Table 10).

Table 10: Checklist of Questions Used in the Stage One Interviews

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Company Information

Size - annual ex-factory sales of Garden products
Structure - company ownership, presence of marketing personnel
Product Group - chemicals, tools, containers, equipment, building, seeds, leisure.

Use of Market Research

Form and use of salesforce reports
Use of other sources; types, frequency and cost
Who makes decisions on the basis of information?
What kind of decisions are they?
What factors affect whether/which market research is bought/used?
What information would you like to get which you are not getting now?
Could you put a monetary value on this information?

Co-operative Market Research

Do you feel that G.I.M.A. members would support a co-operative market research scheme?

In particular discussions about how marketing decisions were made, references to the users and uses of market research and any factors affecting information purchases were encouraged. In addition, information about managers' future research needs and the perceived monetary value of such needs were sought. Having collected information about company's individual research activity managers were asked about their attitudes towards co-operative market research. It was thought that perhaps a projective approach was preferable to direct questioning (Oppenheim 1966), since managers might wish to give the impression of support for association activities whilst not actually wishing to do so. Managers were, therefore, asked to

consider the overall likelihood of company participation. The topics to be covered (Table 10) were typed on G.I.M.A. notepaper headed by the words 'strictly confidential' to gain respondent acceptance and co-operation (McKenna 1978).

3.3.2 Results

COMPANY INFORMATION

The company turnovers ranged from £0.3 to £30 millions per annum (Table 11). Just under half the firms were independently-owned and all of them lacked marketing departments.

Table 11: The Profiles of Companies Interviewed in Stage One of the Research Design
(Companies are arranged by turnover)

COMPANY CODE	PRODUCT GROUP	COMPANY SIZE (Turnover £m)	COMPANY STRUCTURE	
			MARKETING PERSONNEL	OWNERSHIP
1	Chemicals	30	Yes	Division
2	Chemicals	20	No	Independent
3	Tools	17.5	Yes	Division
4	Chemicals	10	Yes	Division
5	Containers	3.3	No	Independent
6	Equipment	3	Yes	Division
7	Seeds	2	Yes	Division
8	Building	1	No	Division
9	Containers	0.8	No	Independent
10	Chemicals	0.5	No	Independent
11	Leisure	0.4	No	Independent
12	Equipment	0.3	No	Division

USERS AND USE OF MARKET RESEARCH

In all twelve companies the identified research buyer played an important role both in buying and using research. In the smaller companies and in those operating

as an independent unit he was usually the only user. However, in the larger firms and in particular divisions of larger concerns other users included the chief executive, marketing, sales and/or technical personnel.

In these situations the group of research users often took decisions by "committee". They agreed that research played a useful role in communicating ideas and plans between different parties both within their company division and between divisions. Three uses of research were mentioned:

(a) to gain agreement between different parties,

(b) to communicate and/or substantiate decisions to higher management, and

(c) to give the appearance of "executing decisions rationally".

The type of decisions made using research were similar for all types of company and ranged from new product introductions to distribution and price decisions.

Only a few managers, mostly from the top research-spending companies, expected research to identify problems and weaknesses. Most managers identified problems themselves and then bought research to reduce uncertainties about action to solve these problems.

SOURCES OF MARKET RESEARCH

All companies encouraged at least some discussion between managers and sales representatives, their formality and frequency varying from company to company. One manager regretted that since he used agents who did not depend on his company for their livelihood he was unable to "motivate" them to report on occurrences in the market-place. Many of the managers required written

reports from their representatives these being discussed on a weekly or bi-weekly basis.

All managers thought that discussions with representatives were useful but they used their own judgement and any other data available to interpret the information before taking any action.

In terms of external research, three companies made no purchases, each relying on a combination of salesmen's reports, journal articles, Government data and consumer correspondence (Table 12).

Overall the most popularly purchased data were non-commissioned reports. These included collations of secondary data sources (for example, Mintel reports) and ad hoc consumer surveys (for example, Shlackman's research).

More than half the companies purchased less than one report, and spent less than £850 on market research, each year (Table 13). As a percentage of company turnover, the amounts spent on research ranged from almost zero to 0.66% - most being around 0.1 to 0.2%.

Table 12: Types of Market Research Used by the Companies Interviewed

COMPANY	TYPES OF RESEARCH TAKEN
1	RETAIL AUDIT, SURVEY (attitudinal and usage), CONSUMER PANEL, ADVERTISING RESEARCH, GROUP DISCUSSION, NON-COMMISSIONED REPORTS
2	RETAIL AUDIT, DISTRIBUTION CHECK, SURVEY, NON-COMMISSIONED REPORTS (Schlackman, N.O.P.)
3	RETAIL AUDIT, DISTRIBUTION CHECK, SURVEY (motivation and product tests), GROUP DISCUSSION, GOVERNMENT DATA (Business Monitor), INTERFIRM COMPARISON (F.B.H.T.M.), NON-COMMISSIONED REPORTS (Mintel, E.I.U.)
4	RETAIL AUDIT, SURVEY (attitudinal), CONSUMER PANEL, GOVERNMENT DATA, INTERFIRM COMPARISON (B.A.A.), NON-COMMISSIONED REPORTS (Henley, E.I.U., Mintel, Schlackman)
5	TRADE JOURNALS (cutting service), IN-HOUSE RESEARCH
6	RETAIL AUDIT, DISTRIBUTION STUDIES, CONSUMER PANEL (new product testing), GROUP DISCUSSION,
7	CONSUMER PANEL, GOVERNMENT DATA (M.A.F.F.), NON-COMMISSIONED REPORTS (E.I.U., Mintel, Key Notes)
8	NON-COMMISSIONED REPORTS (Henley, E.I.U.)
9	SURVEY (wholesaler/consumer attitudes)
10	TRADE JOURNALS, CONSUMER FEEDBACK (letters)
11	GOVERNMENT DATA (exports and imports)
12	GROUP DISCUSSIONS (product testing)

Table 13: **Companies' Use of Market Research in Terms of Frequency and Cost**
(arranged by company size)

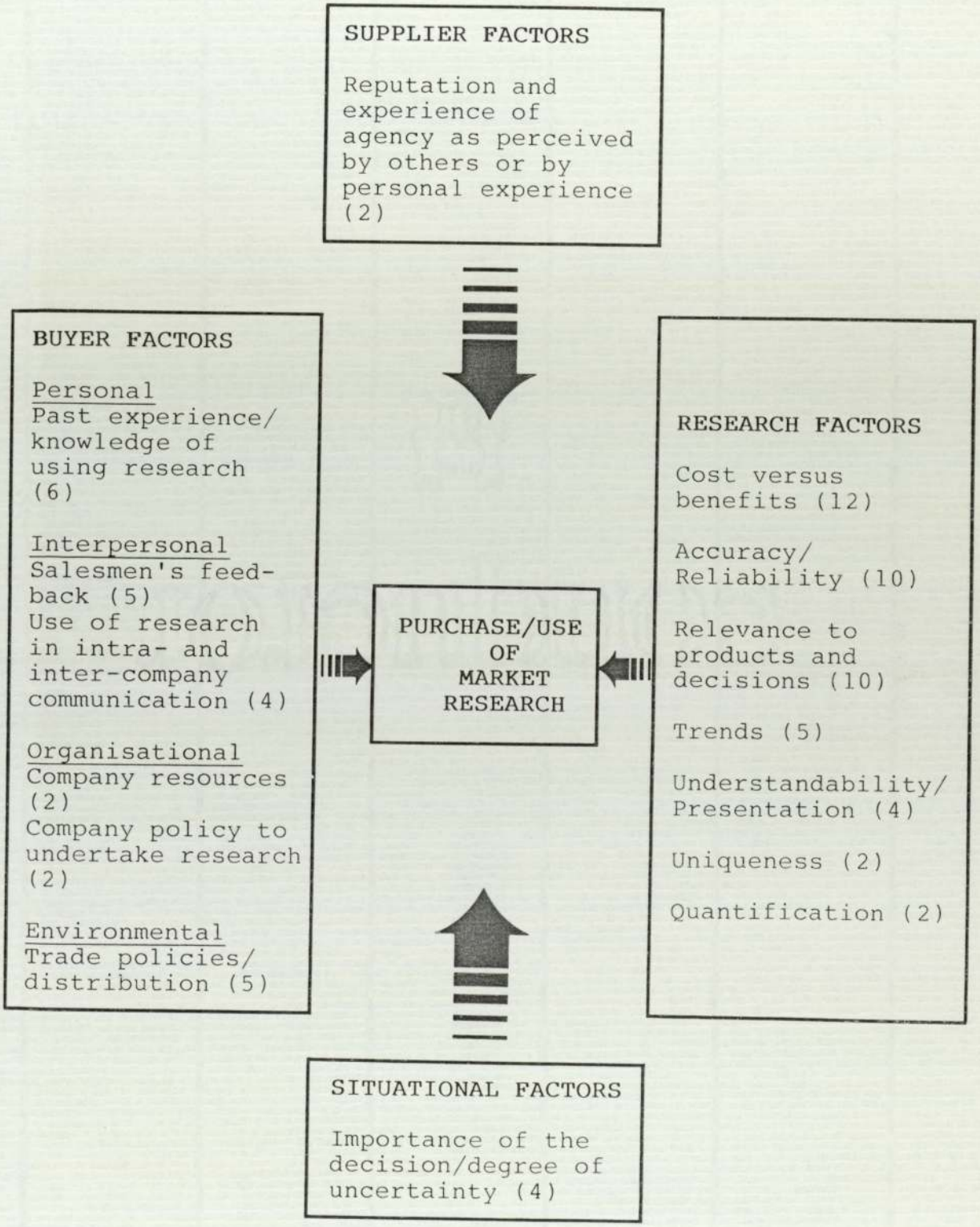
COMPANY CODE	PURCHASE FREQUENCY	AVERAGE AMOUNT SPENT (£'s p.a.)	% OF TURNOVER
1	Annual*	70,000	0.23
2	Less than annual	500	0
3	Annual	5,000	0.01
4	Annual	15,000	0.15
5	Less than annual	25	0
6	Annual	20,000	0.66
7	Annual	10,000	0.25
8	Less than annual	500	0.03
9	Less than annual	850	0.09
10	Less than annual	25	0
11	Less than annual	25	0
12	Less than annual	500	0.17

* At least one research report bought a year

FACTORS AFFECTING RESEARCH PURCHASES

The major influence on the purchase of market research information was the manager's perception of the benefits of research against its costs. This perception seemed to be influenced by a number of factors (Figure 6). These included the risk involved in the decision, the perceived quality of the information and its supplier and, perhaps, most importantly the manager's own experience and resources. Inexperienced managers showed particular concern about which research methods and sellers they should use, whether research would aid their decision making and how much they should spend. No managers, not even the experienced ones, undertook any evaluation of research's worth.

Figure 6: Factors Affecting the Purchase/Use of Market Research



( ) Number of managers reporting factor as important

Relatively low cost, non-commissioned reports were purchased by managers from a variety of companies, the overall feelings about which were expressed by one manager who said:

> "What is around is too general, inaccurate, vague and badly classified. Often you just can't justify the money spent on it."

The main problem seemed to be the reports' lack of product specificity and, with each report classifying products differently, comparisons between data sources were often difficult. In addition, irregular production of the reports made the prediction of market trends equally troublesome.

For high-cost, commissioned research the primary influence was managers' experience of the accuracy of research methods in his markets. For example, two chemical manufacturers considered the retail audit to be inaccurate because of the exclusion of Garden Centres and Boots plc from the audited shops. Manufacturers of infrequently purchased products, on the other hand, were more concerned about the small sizes of consumer panels leading to poor "product pick-up". A seeds manufacturer, however, favoured the consumer panel because mail order distribution and a sale-or-return policy, made retail monitors inaccurate reflectors of the market-place.

Although the consumer panel and retail audit were considered more accurate than memory-based consumer surveys they were also much more expensive than other methods and required a continuous commitment of funds. Not surprisingly, therefore, they were only used by the largest companies in the sample. Two managers had experienced co-operative research by participating in

interfirm comparisons. Although they were fairly satisfied with the technique some others felt that its results were inaccurate or that data would not be kept confidential. Six managers were inexperienced in the use of these and other research methods. This meant that their perceived benefits of research were often based on experiences of low-cost, non-commissioned reports. Such managers were relatively more concerned about costs and how research could help them in the running of their businesses.

FUTURE INFORMATION NEEDS

In general the companies with marketing personnel indicated a larger number of research needs than other companies (Table 14). The most frequently mentioned research need, by all types of company, was attitudinal data. This included both consumer and trade attitudes towards companies' products. Of lesser importance were market sizes and trends, for which managers distinguished between current and future markets. Managers from companies at the top of the table required a variety of brand data, segmented by outlet/consumer type and region. Those from companies at the bottom of the table were generally more concerned with product-market trends. Exceptions did occur where companies had regional distribution or where only one or two brands were manufactured.

When asked to put a value on their requirements all managers wanted to see a full research proposal before considering its monetary value. Some managers proferred sums betwen £500 and £1,000 which they would spend on some basic research.

Table 14: The Future Research Needs of G.I.M.A. Managers

COMPANY CODE	TURN-OVER	STRUCTURE	MARKETING PERSONNEL	INFORMATION TYPES REQUIRED												TOTAL
1				1		1		1				1				4
3				1	1	1		1		1						5
4	>£1m	DIVISION	YES		1	1			1		1			1		5
6				1			1			1	1					4
7						1	1		1			1	1			5
8			NO	1			1								1	3
2	>£1m	INDEPENDENT	NO	1		1					1					3
5				1	1					1						3
12	<£1m	DIVISION	NO		1				1							2
9				1				1	1					1		4
10	<£1m	INDEPENDENT	NO				1	1								3
11					1											1
TOTAL				7	5	5	4	4	4	3	3	2	2	2	1	
				A	B	C	D	E	F	G	H	J	K	L	M	

KEY:
- A Attitudes to existing products
- B Attitudes to new products
- C Purchase/Usage data
- D Market size and trends
- E Which products sold and where
- F Trends in trading
- G Amount sold in season
- H Consumer Profile
- J Outlets stocking product
- K Relative importance of outlets
- L Information on competitors products
- M How best to advertise

The top research spender offered only £500 because his data collection was already extensive. This supported the fact that information needed to be unique or to complement research already received by companies (Figure 6).

CO-OPERATIVE MARKET RESEARCH

Managers were reluctant to support any co-operative scheme if it used methods about which they had expressed reservations unless the problems of using them were overcome. Despite this, all of the interviewees were in favour of supporting a "well-researched" co-operative scheme since this would take their concerns into account. Most saw the reduction of individual's costs as the main advantage but others included:

(a) more objective research because it would not be collected for only one company,

(b) more accurate research because the scheme would be orientated towards the Garden Industry, and

(c) more relevant research both in terms of products and segmentation factors.

Managers considered a number of points which they thought needed further research of the whole membership. These were:

(1) the type(s) of research that should be undertaken,

(2) managers' education to a minimum level of research understanding,

(3) the demand for advice on how to use research and how this could be satisfied,

(4) whether participation in a scheme should be compulsory, and

(5) how the research should be funded and the costs shared.

In general terms the most popular solution for funding co-operative research involved a fixed cost from G.I.M.A. with individual companies paying the rest according to the amount of data they received. This approach was favoured because it allowed flexibility to participate in a co-operative scheme since its undertaking would not be so dependent on individual members' co-operation. In addition, managers wanted to be forewarned about the cost and timing of research so that funds could be allocated in advance. In the more immediate future over half of the interviewees thought that a seminar on market research in the Garden Industry would help managers understand the objectives of a co-operative scheme and ensure meaningful results to future questionnaires.

3.3.3 Discussion

Whilst many believe that managers' purchases of market research are influenced by their interaction with their own company, the research supplier, the buying situation and the research product (Chapter Two) little is known about the relative importance of these factors. The most frequently mentioned influences in this study related to the research product and, in particular, its costs versus its benefits. This was because G.I.M.A. managers justified research purchases in terms of their potential to improve the profitability of their decision making. They measured the likelihood of achieving this objective in terms of cost, accuracy and the relevance of the research both to company products and to managerial decisions. Bearing such objectives in mind it was not surprising that factors like the importance of the decision to be made and the degree of uncertainty

surrounding it (Figure 6) affected research purchases.

Certain buyer-related factors, for example policies to undertake research and resources set aside to purchase/use it, eased the research-purchasing process. These were most often present, in the large multi-divisional companies but in the small (and particularly the independent) firms where they were not present managers were less likely to buy research because of high costs and insufficient personnel. There was evidence that managers from these latter companies considered cost not only as an organisational influence but also as a personal one since many were shareholders. As well as being more sensitive to cost issues (and, perhaps, because of this) the managers of small companies had less experience of the benefits of research and, consequently held less favourable attitudes towards it (Bellenger 1979). They also displayed a greater dependence on salesmen's market intelligence, although many questioned its reliability. These inexperienced managers held certain doubts about market research, including what research they should buy, from whom they should buy it and how much they should spend.

Concerning this last point not even the most experienced managers ever undertook formal evaluations of research and many of them seemed to justify its purchase in terms of its use in inter and intra-company communication. This was particularly true of the large multi-divisional companies in which a number of research users formed a decision-making group - a contrast to the more "autocratic" management style in the small independent companies. Table 15 shows that management style may be important in

affecting the amounts spent on market research. This concurs with Deshpande's theory (1980) that the more decentralised the decision making authority (as in divisional companies) the more research is used. It also agrees with the hypothesis that Channon (1968) propounded concerning the use of research to formalise decision makers' common processes.

Table 15: Company-Related Factors Affecting Research Purchases
(arranged by research expenditure)

COMPANY CODE	TURN-OVER (£m)	COMPANY STRUCTURE			TURNOVER SPENT ON RESEARCH (%)
		MARKETING PERSONNEL	STRUCTURE	MANAGEMENT STYLE	
6	3	YES	DIVISION	COMMITTEE	0.66
7	2	YES	DIVISION	COMMITTEE	0.25
1	30	YES	DIVISION	COMMITTEE	0.23
12	0.3	NO	DIVISION	COMMITTEE	0.17
4	10	YES	DIVISION	COMMITTEE	0.15
9	0.8	NO	INDEPENDENT	COMMITTEE	0.09
8	1	NO	DIVISION	COMMITTEE	0.03
3	17.5	YES	DIVISION	COMMITTEE	0.01
2	20	NO	INDEPENDENT	AUTOCRATIC	0
5	3.3	NO	INDEPENDENT	AUTOCRATIC	0
10	0.5	NO	INDEPENDENT	AUTOCRATIC	0
11	0.4	NO	INDEPENDENT	AUTOCRATIC	0

In general, the research findings found agreement with the literature. But whilst company size, structure, product field and managers' previous research experience influenced the amount of market data bought there were no indications that any of these factors affected the type of information sought. Product field did have an effect on the research method used and, in particular, the distribution of products and the effect of trade policies

affected managers' perception of the accuracy of data collection methods. Another factor affecting the use of particular research methods was buyers' familiarity and previous experience of it, favourable experiences encouraging more frequent use.

G.I.M.A. managers suggested two research-related factors which had not been mentioned before; the need for trend data and for data not available elsewhere. They were mentioned by managers from various types of company and may reflect a discontent with the existing research sources in the Garden Industry. Irregular production of data made trends difficult to predict and the use of different research methodologies and product definitions made comparisons between data-sets equally difficult. Another explanation for the difference between the results and the literature may have been due to the differences in the companies researched. G.I.M.A. companies spent only 0.1 to 0.2% on average of their annual sales on research whereas companies of a comparable size from the literature spent around 1.4% (Twedt 1978). However, this does not explain G.I.M.A. managers' preference for attitude data whilst others prefer market sizes (ibid), since there is no evidence that companies of varying research use want different information. The possibility that this difference was due to sample bias needed to be resolved in the next stage of the investigation.

Concerning co-operative research the managers interviewed shared the belief that it would provide useful research at a more affordable price. This belief was based on the perception that if G.I.M.A. co-ordinated the research it would be more objective, accurate and relevant to

managers' needs. To achieve this it was essential that G.I.M.A. assessed the data and advice required by their members and considered how the scheme would work in practice. These assessments would form the basis of a research proposal and only at this stage did managers feel that they could judge its value.

Three criteria were particularly important. Firstly, some managers had reservations about the quality of data collected by different research methods. However, since all methods caused some concern it was inevitable that some compromise would need to be made. Secondly, G.I.M.A. managers varied a great deal in their knowledge of market research. A programme of education and communication would, therefore, be important in achieving a common understanding between members (Kapferer and Disch 1964). Thirdly, the managers favoured joint funding between the Association and the members. This meant that the incorporation of the Association's financial limitations into the final evaluation could be crucial to the scheme's success.

3.3.4 Conclusions

The aim of the first stage of the investigation was to understand the information flows of different types of company and to record their future requirements for research data. This was achieved by questioning research buyers (who, in all cases were also users) from a variety of companies reflected by their company size, structure and product field. The top research spenders were large multi-divisional companies and it is suggested that their committee-style decision making, established procedures for research and managers' greater experience of research

benefits were important influencing factors. Other factors like the importance of research costs (particularly to owner-managers) and the marketing environment surrounding products made some research methods more attractive than others.

Companies of a similar size or structure did not report the same information needs. However, managers from the large multi-divisional companies reported a larger number of future information requirements and, overall, the most frequently mentioned were consumer and trade attitudes towards company products. If these requirements were, indeed, representative of the needs of the whole membership (a situation to be decided in Stage Two) it raised two problems. The first was one of feasibility since it was estimated that the members collectively manufactured around 1,000 product types and many more brands. Since managers generally wanted consumer attitudes towards products and sometimes brands the collection of such data might not be cost-effective if all products were involved. The second problem concerned product definition and classification. G.I.M.A. had no record of its members' products and there was no accepted method of classifying the brands into product groups. It was clear that before any market research was undertaken these problems would need to be addressed. Managers were not, however, only concerned with the product specificity of co-operative research data. Many wanted it to be accurate, collected on a regular basis, simply presented and, particularly managers from the small, independently-operating companies also needed help in understanding and using the data. The differences in

managers' experience of research indicated the need for an education programme and many thought that this could begin with a market research seminar. The objective of this seminar would be to make G.I.M.A. managers aware of the potential benefits of research through practical example and to use the opportunity to discuss managers' concerns about a co-operative research scheme.

In general, managers' attitudes towards a well-researched co-operative scheme were favourable. All of them wanted to see a full proposal before making a decision about their participation but factors which would encourage managers to co-operate included:

(a) the provision of accurate data which satisfied a common need,

(b) joint funding between the Association and individual members and sufficient warning of the timing and costs of research, and

(c) some type of consultancy/advice to help managers understand and use the data most effectively.

3.4 STAGE 2: THE SELF-ADMINISTERED QUESTIONNAIRE

The first stage showed that companies of the same size, structure and product field exhibited very different future research needs. It was, therefore, necessary to question all G.I.M.A. member companies about their information requirements.

This was achieved using two questionnaires. The first collected information about the various companies, their managers' previous research experience and future needs and the second ranked these needs in order of their importance. The two questionnaires are reviewed in

Appendix One and Two respectively and only a summary of the major results from each is presented here.

3.4.1 First Questionnaire

The first questionnaire, which was mailed to all G.I.M.A. members in September 1982, presented managers with a list of information options (Table 16) against which they were required to indicate previous use and future need.

Table 16: Information Options Suggested in the First Questionnaire

MARKET SIZE

The value of the market sectors in which you are competing
The value of the market sectors in which you may wish to enter

PRODUCTS

Attitudes towards existing products/pricing/promotions etc
Attitudes towards new products
The competitive characteristics of your products
Information concerning your competitors' products

CUSTOMERS

The characteristics of the consumers who buy/do not buy your products
Information concerning the frequency of purchase/usage

MARKETING

Information concerning the distribution of your products
Attitudes towards new and/or existing advertisements
Opinions of the Trade toward products/advertising etc.
Others (please state)

The survey showed that over half the respondents had little or no research experience, indicating that at least some would need advice about how to use market research. Although some felt that they would buy more research if it were more relevant to their company's products the main factors suppressing research purchases were its high costs

and personnel shortages. Large multi-divisional companies were more likely to have bought research than small independently-operating firms and, although the greater experience of these managers made them more receptive to future information purchases the actual types of information they required were (as found in Stage One) no different to those of other types of firm.

Almost one quarter of the respondents (research users and non-users) wanted all the information options listed. Nearly all of them wanted to know the value of their product-markets thus confirming the requirement (Stage One) for product markets to be defined precisely. (This process of definition will be considered in the next chapter). Since the second most frequently wanted information type was consumer attitudes to new products, the results showed a reversal of the primary and secondary research needs indicated in Stage One. This may have simply been because of sampling bias arising from Stage One but it equally could have been because of the different methods of questioning used. For example, in the interviews (Stage One) managers may have indicated only their primary needs because they were the first to mind but the questionnaire may have prompted them to indicate needs of lesser importance.

In order to decide which data type was of primary importance further research was needed to assess the relative importance of the various information options on the list. This same list of information options was therefore re-issued, but with the additional requirement that managers ranked their information choices.

3.4.2 Second Questionnaire

The results of the secondary questionnaire confirmed that nearly all managers' required information on current market sizes and showed that two-thirds of the respondents considered it to be a primary or secondary need.

In common with previous surveys factors like company size, structure, research use and products manufactured were not found to be linked to future research needs. However, the results of both the Stage Two questionnaires were, through non-response, bias against the needs of managers from small independently-owned, non-research users, and it was clearly desirable to gain a better understanding of their needs.

There were three further reasons for needing additional research. Firstly, Stage One had shown that managers required data which was relevant to their current decision making. It was, therefore, important to see if information needs changed with time. Secondly, some concerns have already been raised about the effect that methods of questioning have on managers' responses. It was essential to try to understand this effect. Finally, Stage One examined factors which were likely to affect managers' purchases of market research. Confirmation of their relevance to all managers was needed for the design of the final research proposal.

In view of these requirements for further research a new technique was developed. This allowed managers the freedom to express their future research needs and the factors affecting research purchases whilst constraining them sufficiently to secure longitudinal data.

3.5 STAGE THREE: THE MODIFIED DELPHI TECHNIQUE

3.5.1 Introduction

A number of methods (Table 17) were considered to achieve these aims of flexibility of responses whilst securing data comparable to previous studies.

Table 17: Methods Considered for the Third Stage of the Research Investigation

RESEARCH METHODS
(1) Simulated Marketing Game
(2) Word Association Test
(3) Third Person Test
e.g. "Suppose you are a Marketing Research Manager and you need to persuade a sceptical manager to buy your research. Describe, the research you would sell to him and the characteristics you would emphasise to ensure its sale."
(4) Group Discussion
(5) Delphi Technique

Simulated marketing games have been used to find out about managers' decision making (Green et al 1967) and their information purchases (Cardozo et al 1972). However, they generally concentrate on one decision situation which restricts the expression of research needs under different circumstances and would not provide comparable data to that collected previously. Word Association and Third Person Tests (Chisnall 1975) both encourage more spontaneous expression but controlling responses to gain longitudinal data would have been difficult. One method which did offer the opportunity of a free yet directed

dialogue was the Group Discussion which, if run by a Market Research agency, would ensure a more objective interpretation of the results than could be achieved by the author. However, practical problems, including the cost of £200 for one hour's discussion and getting a group of managers together, made this a less attractive proposition.

Kotler (1980) recommended an alternative method of gathering opinions - the Delphi Technique. By this method managers express their opinions to a project leader who revises them and sends them back for a second review, and this process continues until the managers more closely agree. The basis of the technique had already been started since Stage One results could be considered as the first round of the Delphi Method. However, if the technique was to be used it had to satisfy three conditions. Firstly, it had to efficiently reach all managers which implied the use of the questionnaire method (Table 8). Secondly, it needed to allow managers' free expression of their research needs and factors likely to affect research purchases. Thirdly, and without prejudicing the second condition, the research design had to facilitate a comparison (the feedback and review of the Delphi Method) between these free expressions and the results of previous research. It was by a novel design that these two data sets were separated (Exhibit 1).

EXHIBIT I: The Modified Delphi Questionnaire

MARKETING RESEARCH

STRUCTION 1: PLEASE COMPLETE THIS PAGE, THEN TEAR ALONG THE DOTTED LINES.

ESTION A: WHAT ARE THE 5 THINGS YOU MOST WANT MARKETING RESEARCH TO TELL YOU?

)_____

)_____

)_____

)_____

)_____

PLEASE

DO NOT

WRITE

IN THIS

SPACE

UESTION B: CAN YOU NAME 5 FACTORS AFFECTING YOUR DECISION TO BUY THE ABOVE DATA?

)_____

)_____

)_____

)_____

)_____

PLEASE

DO NOT

WRITE

IN THIS

SPACE

NOW TEAR ALONG THE DOTTED LINES.

ELOW YOU WILL SEE YOUR ANSWERS TO QUESTIONS A AND B PLUS SOME OF THOSE GIVEN BY THER G.I.M.A. MANAGERS. IF ANY ARE REPEATS OF YOUR ANSWERS, PLEASE DELETE THEM.

STRUCTION 2: SEPARATELY, FOR QUESTIONS A AND B, CHOOSE THE 5 MOST IMPORTANT ANSWERS TO YOU. NOW RANK THEM IN ORDER OF THEIR IMPORTANCE (1= most important)

UESTION A: WHAT ARE THE 5 THINGS YOU MOST WANT MARKETING RESEARCH TO TELL YOU?

RANK

1) —

2) —

3) —

4) —

5) —

6) How much are you actually selling —

7) Which of your products are selling, in which outlets —

8) Purchase patterns (what bought, where, when, price paid and by whom) —

9) Consumers'/customers' attitudes to new products —

10) Consumers'/customers' attitudes to existing products —

11) Market sizes and trends in market sizes —

UESTION B: CAN YOU NAME 5 FACTORS AFFECTING YOUR DECISION TO BUY THIS DATA?

RANK

1) —

2) —

3) —

4) —

5) —

6) The relevance of the information to your current marketing problems —

7) Whether trends can be established from the information —

8) Whether you understand the information /know how to use it —

9) Whether your product groups are mentioned —

10) The accuracy/reliability of the information —

11) The cost of the information —

Y COMMENTS, PLEASE WRITE ON A SEPARATE SHEET THANK YOU

Initially, managers were asked to (a) state their information needs and (b) the factors likely to affect their research purchases on the front of the sealed document. These statements were, using no-carbon-required paper, transferred to the enclosed sheet on which were printed the most frequently mentioned statements arising from the Stage One results. Managers were then asked to open the document and compare their statements with those previously obtained and rank the most important in each section.

3.5.2 Method

PILOT TEST

It was obviously essential that managers understood the questions used in the modified delphi technique. Twenty managers were, therefore, asked (August 1983) to respond in writing to various questions. The ones used in the final questionnaire were commonly understood.

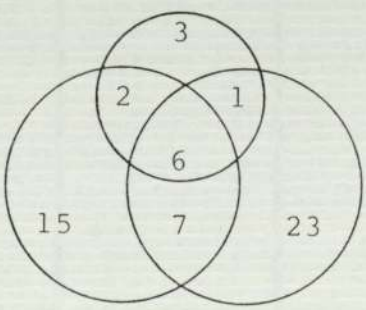
Another problem which was considered concerned the consistent non-response from the small, independently-owned non-research-user company. One incentive to encourage response from this sector involved running the questionnaire in conjunction with work of more obvious commercial gain. Previous work had indicated the importance of classifying members' products (Stages One and Two) and this was being undertaken at this time. The result of this was the publishing of a Trade Directory of products which would be available to all major buyers thereby advertising members products (Chapter Five). Managers were requested to return their completed modified delphi questionnaires with their entries for the Directory.

3.5.3 Results

Questionnaires were sent out in September 1983 and again in January 1984, avoiding the Christmas period in the follow-up mailing (see Stage Two). Thirty-seven usable replies (54% of the membership) were returned and although there was still some under-representation of the small non-user company (Graph 1) this was five-eighths of previous levels. In addition, independently-owned companies were no longer under-represented and all types of products were covered. The novel questionnaire design did not appear to discourage responses since many managers who had not replied to previous studies did so to this one (Figure 7).

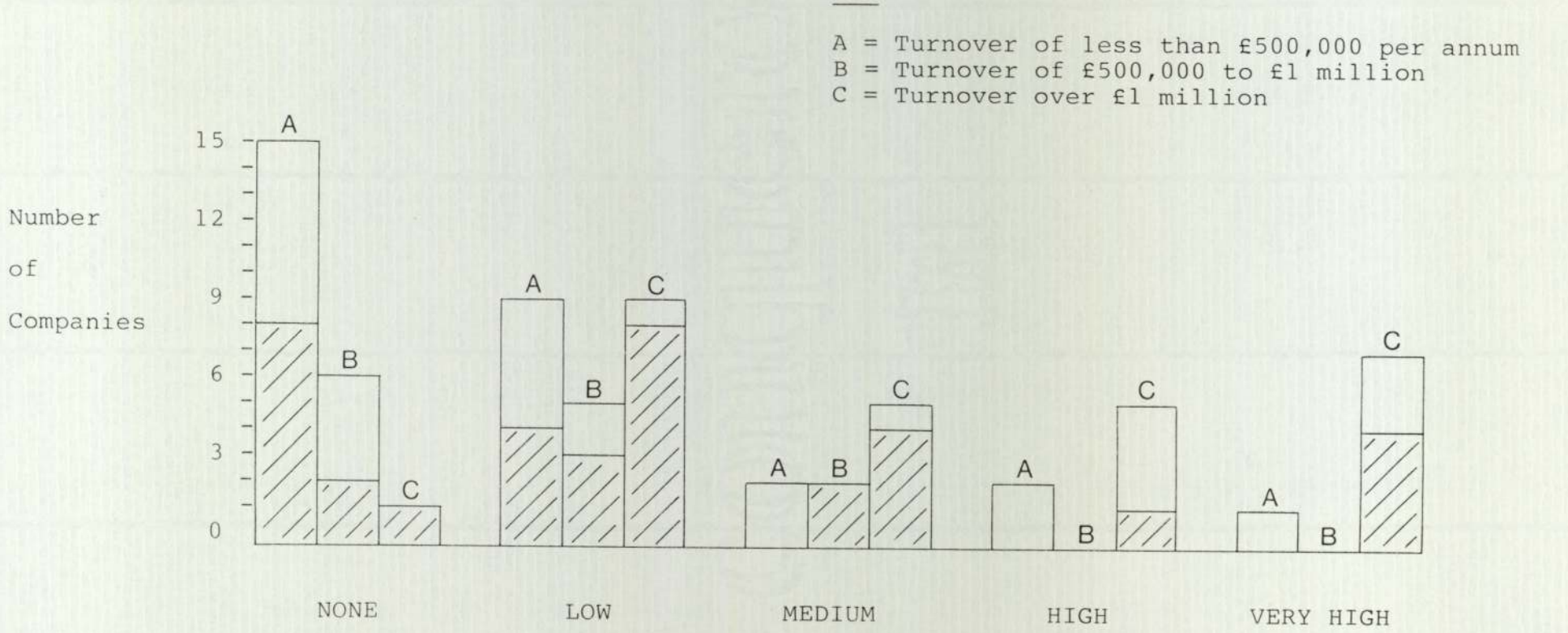
Figure 7: A Venn Diagram Depicting the Participation of Companies in the Three Stages of the Research Design

Universal Set = 80



Note: Some companies answering only one stage subsequently lapsed membership, merged with another member or were new members.

Graph 1: The Size and Research Use of Companies from the Whole Membership and those Responding to the Third Questionnaire(shaded)



Question A generated a total of 180 statements (Appendix Three). These were categorised, separately by two University lecturers and the researcher, into various information types (Table 18) on the basis that information collected by different research methods should not appear in the same group. So, for example, "My market share" and "A Competitor's market share" would be grouped separately because the former requires market size data and the latter market sizes plus competitors' sales information. Any contentious statements were referred back to their author for resolution.

Table 18 shows that over 80% of the respondents made at least one and many two, statements about their "markets". Many managers indicated a need for both market sizes and trends.

In ranking their statements, three-quarters of the respondents reported market information to be their primary research need and only four companies failed to rank it at all (Table 19). These four companies, which were of different profiles, all indicated primary needs for various types of consumer data.

Table 18: Managers Statements Concerning their Most Important Research Needs (Question A)

INFORMATION TYPE	NUMBER OF MANAGERS MAKING A STATEMENT	NUMBER OF STATEMENTS
MARKETS		
Market Size	12	15
Market Trends	2	2
Market Size and Trends	16	37
TOTAL	30	54
COMPETITORS		
Competitors' Shares	11	11
Competitive Activity	12	12
TOTAL	22	23
DISTRIBUTION DATA		
Best Outlets	9	11
Distribution and Stock	11	12
Trends	3	3
General	3	3
TOTAL	20	29
CONSUMER ATTITUDES		
Price	7	7
Promotion	2	2
Pack/Product	6	8
New Products	5	5
Brand Awareness	5	5
General	10	12
TOTAL	19	39
CONSUMER PURCHASES		
What Bought	3	3
Where Bought	3	3
Price Paid	4	4
Who Bought	3	3
Usage	1	1
General	2	2
TOTAL	13	16
CONSUMER ATTITUDES	5	6
WHAT TO MAKE	5	5
MISCELLANEOUS	4	8
GRAND TOTAL		180

Table 19: The Ranks Managers Gave to Each Information Type

INFORMATION TYPE	MANAGERS RANKING OPTION: IN TOP 5	1	2	3	4	5	TOTAL STATE-MENTS RANKED*	SCORE
Markets	33	28	15	3	3	3	52+	218
Distribution Data	25	2	6	9	9	9	35	88
Consumer Attitudes	24	1	8	10	13	13	45	106
Consumer Purchases	17	3	3	7	3	5	21	59
Competitors	15	1	3	5	5	3	17	45
What to Make	5	2	1	1	1	0	5	19
Customer Attitudes	4	0	1	1	3	1	6	14
Miscellaneous	2	0	0	1	0	1	2	4

* 2 companies did not rank their fifth option
+ Some managers ranked more than one statement about "Markets"

Question B generated only 138 statements, the most frequently occurring ones concerning finance, research accuracy and relevance (Table 20). These factors were also ranked as the most important influences on managers' research purchases (Table 21).

Table 20: Managers Statements Concerning Factors Affecting their Purchases of Market Research Data (Question B)

INFORMATION TYPE	NUMBER OF MANAGERS MAKING A STATEMENT	NUMBER OF STATEMENTS
FINANCE		
Cost	30	31
Funding	2	2
Cost/Benefits	3	3
Company-cash Availability	2	3
TOTAL	34	39
ACCURACY		
Overall accuracy	22	22
Accuracy of Sample	4	5
Reputation of Research Company	3	3
TOTAL	28	30
RELEVANCE		
Relevance to Products/Markets	11	19
Relevance to Company	12	18
Timing/Speed of Delivery	8	8
TOTAL	24	45
UNDERSTANDING		
Understandable	6	6
Aid in Understanding	3	4
TOTAL	9	10
TREND DATA	3	3
UNIQUENESS/COMPATIBILITY	5	5
CONFIDENTIALITY	2	2
MISCELLANEOUS	3	4
GRAND TOTAL		138

Table 21: The Relative Importance of Each Factor in Affecting Managers' Research Purchases

FACTOR AFFECTING RESEARCH PURCHASE	MANAGERS RANKING OPTION: IN TOP 5	1	2	3	4	5	TOTAL STATE-MENTS RANKED*	SCORE
Cost/Funding	32	16	6	5	5	3	35	132
Accuracy	28	9	7	8	4	2	30	107
Relevance: to Products	22	5	8	6	4	4	27	87
to Company	26	2	8	4	10	8	32	82
Understand-ability	14	0	5	6	3	2	16	46
Trends	11	0	0	2	2	7	11	17
Timing	5	0	0	3	2	0	5	13
Uniqueness	4	2	0	0	1	1	4	13
Cash available	2	1	1	0	1	0	3	11
Researcher's reputation	3	1	0	1	1	0	3	10
Miscellaneous	3	0	0	1	0	2	3	5

*16 ranks were not given

Generally there were no similarities between company profiles and the concerns of their managers. One exception was that managers requiring help in understanding research had used little or no research in the past and they were more concerned, than research users, about the benefits of research data.

3.5.4 Discussion

There were four main reasons why this third stage of the investigation into G.I.M.A. managers' information needs was thought necessary. These were (1) respondent bias in previous surveys, (2) the need for longitudual data, (3)

the relative importance of factors affecting research purchases, and (4) bias from research methods.

(1) Respondent Bias

One concern was the lack of data about the needs of small, independently-owned companies that bought little or no market research. The modified delphi technique, perhaps because it was run in conjunction with work of more tangible benefit, collected more data than previous surveys about this respondent group. At the end of the three-stage investigation more than two-thirds of G.I.M.A. member companies had indicated their relative preferences for research information and only seven companies had failed to respond to all the forms of questioning. All these companies had annual turnovers of below £1 million, spent nothing on research and all but one were independently owned.

(2) Longitudinal Data

In previous surveys managers had indicated a need for research data to be relevant to their current decision making. It was, therefore, thought possible that their information needs might change with time. The results of the modified delphi technique showed that priorities remained the same over time and confirmed that nearly all managers were looking for market size data with over half of them wanting it on a trend basis (Table 22).

Table 22: A Comparison Between the Results of Stage Two and Stage Three

INFORMATION TYPE	% OF MANAGERS PLACING TYPE IN TOP 5 CHOICE		% OF TOTAL SCORE GIVEN TO EACH TYPE	
	STAGE 2	STAGE 3	STAGE 2	STAGE 3*
Market size and trends	90	89	33	40
Consumer attitidues to existing products	70	65	14	19
Distribution data	60	68	12	16
Consumer purchases	57	46	11	11
Competitor information	53	41	7	8
Consumer attitudes to new products	40	24	7	4
Customer attitudes	23	11	4	3

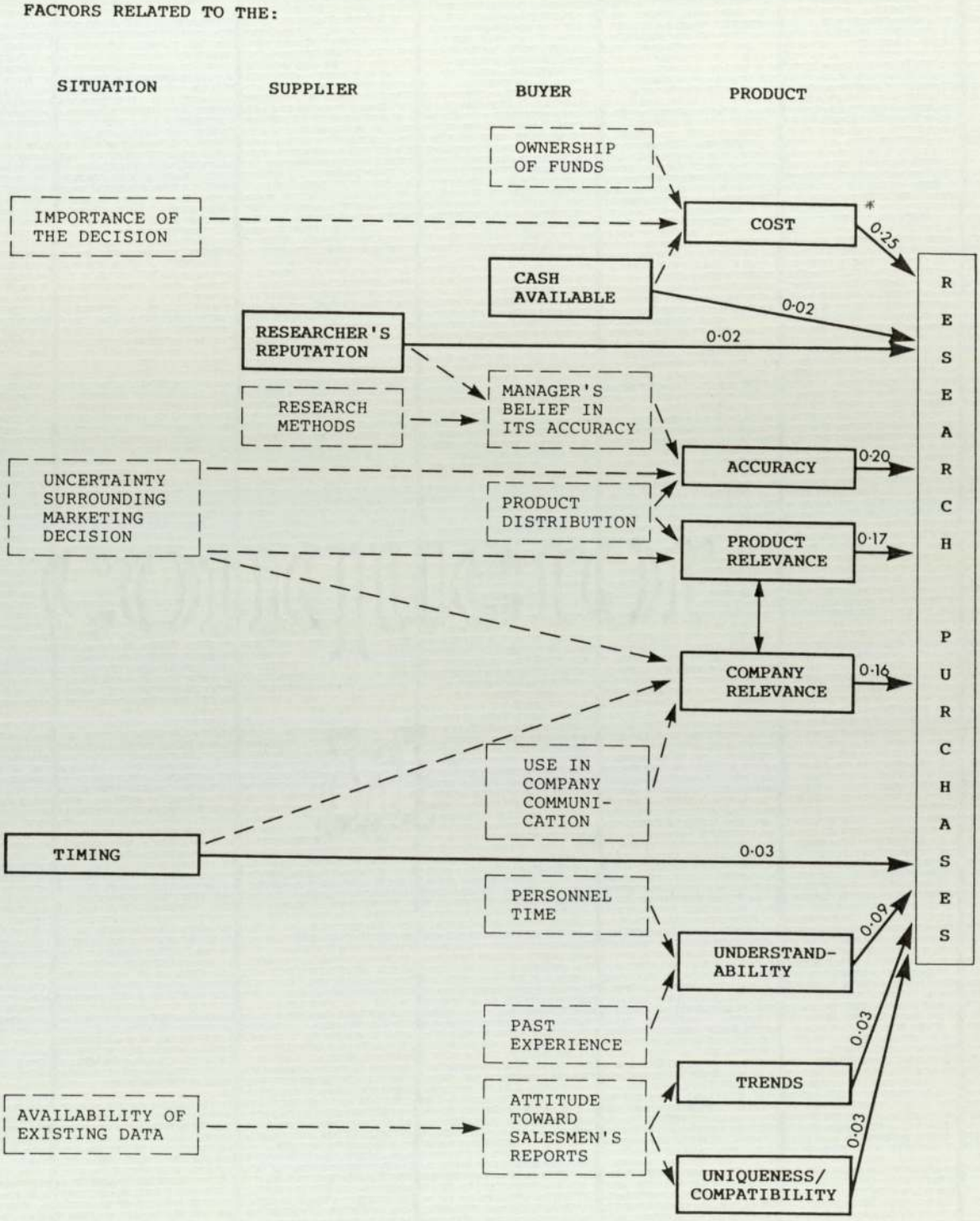
* Total exceeds 100% because of rounding

(3) Factors Affecting Research Purchases

This final stage was also important because, like Stage One, it collected information about the factors managers consider when purchasing research information. As found previously the most important factors were cost, accuracy and research relevance. The needs for trends and unique data (Stage One) were seen as less important. In addition, a number of other factors (for example, situational and buyer-related factors) which had been identified in earlier research were not mentioned at all by managers. This may have been because such factors had a less direct effect on purchases, as suggested in Figure 8.

Figure 8 depicits the numerical results of Stage Three of the investigation and uses previous studies on G.I.M.A. managers to explain their importance.

Figure 8 : Factors Affecting Research Purchases



SOLID LINES INDICATE DIRECT EFFECTS

DOTTED LINES INDICATE INDIRECT EFFECTS

*% score attributed to each factor (see Table 21)

Cost, for example, which was previously thought by researchers to be a relatively unimportant determinant of research purchases (Lehmann and O'Shaughnessy 1974) was shown to be the singularly most important. This may have been because it was not only the influence of price on buying decisions but also the availability of cash, its ownership and the importance (in terms of profit) of the decision to be taken that influenced it. The figure also shows that research accuracy not only depends on the statistical validity of the information in terms of the size and make-up of the sample but also managers' belief in its accuracy. This can be influenced by managers' opinion of the reliability of both the market research company collecting the data (as shown in section 4.3) and the research method used. The accuracy required may also depend on the information the manager has about the decision-making situation since he may already have general data and may require more specific and more accurate data about particular topics. The G.I.M.A. managers indicated that such topics may be relevant to the company or more often to the company's products. Figure 8 takes account of the Stage One results which showed that product distribution can affect product relevance because certain research methods are thought to be less suited to collecting information about particular products. Company relevance is also important since G.I.M.A. managers indicated that information may be required because it is relevant to the companies' decision-making process and, in particular, to the process of communication. Obviously, timing was seen as important here because for information to be relevant it must be timely.

The final factor covered in Figure 8 is the requirement for research to be understandable. This factor was more important for small firms because of their lack of personnel to process the data. However, even for managers from large companies past experience played an important role in their receptiveness to particular research data.

The need for trends and unique data were of less importance than Stage One had suggested and their mention at all may reflect the discontent with existing data.

(4) Research Bias

The first stage had sought qualitative data from a few managers and the second stage quantitative data from all G.I.M.A. members. The modified delphi technique sought to bridge the gap between the two and thereby minimise the effect of bias arising from the research method. Some factors which had been identified by the qualitative research were not found in the results of this final stage questionnaire and it is, therefore, suggested that both qualitative and quantitative research need to be undertaken. In this way complementary data can be collected (Payne 1964) and a broader picture of managers' research needs can be built.

3.5.5 Conclusions

The main objective of this third stage of the investigation was to assess the managers' primary needs for research information and the major factors affecting their information purchases. The Delphi technique was modified so that the data collected could be compared to those from Stages One and Two. An attempt was made to decrease the non-response from one sector of the membership by running the study in conjunction with other

work. This proved to be highly successful.

Most managers' primary research needs could be satisfied if market size data were defined by the relevant product markets and provided on an on-going basis. In addition, the right balance between the cost and accuracy of this data would have to be found. In view of the fact that over half of the membership had little or no experience of buying research it seemed most likely that, at least in the short term, low cost alternatives for collecting market data should be considered. Also methods of teaching managers about market research needed to be developed.

3.6 Chapter Summary

This chapter describes three methods of collecting information about the research needs of G.I.M.A. managers and the factors affecting their purchase decisions.

The first method looked in depth at the research practices of twelve companies by interviewing their research buyers. Although managers varied in their use and understanding of research there were a number of common factors which influenced their research purchases. These involved situation, supplier, research and buyer-related factors. Past research use seemed to be related to company size, structure and product field but, since it did not seem to influence future information needs, research into all G.I.M.A. managers' requirements was essential. Stage One showed that managers were generally concerned about the use of different product classifications and the ad hoc nature of available research and that they wanted to know more about the use of other types of market research. Before any co-operative research could be realistically

considered managers wanted to see alternative proposals for research, including its funding.

Stage Two of the investigation involved two questionnaires which showed that a primary research need for almost half the membership was for market sizes and trends. Stage Three substantiated this finding for a larger selection of the membership and showed that this was a consistent need over time. This third and final stage of the analysis also outlined the most important factors affecting managers' information purchases. As had been indicated during the initial interviews managers considered the cost and the benefits (accuracy, relevance and understandability) of research when considering its purchase.

Since over half of the G.I.M.A. members had used little or no market research it was suggested that low cost methods of collecting market size and trend data be considered first and that an education programme be developed.

CHAPTER FOUR

SITUATIONAL FACTORS

The last chapter considered managers' individual needs for market research information and factors likely to affect its purchase. Attention is now turned to the forces which might influence G.I.M.A. undertaking co-operative research activities.

There are four main areas of influence:

(1) factors limiting G.I.M.A.'s capacity to undertake research,

(2) G.I.M.A.'s future growth,

(3) the nature of available statistics, and

(4) the attitudes of existing and potential suppliers of market research.

4.1 FACTORS LIMITING G.I.M.A.'S RESEARCH CAPACITY

Chapter Two showed that two factors may be particularly important in limiting the co-operative market research activities in associations. Firstly, the fragmentation of an Industry's associations network leads to a large number of small bodies with limited funds available for co-operative activities. Secondly, the internal structure of an association may affect its organisational capacity to undertake services.

To understand how these forces worked in the Garden Industry a study of horticultural trade associations was undertaken. This was preceded by a background survey in which twenty British trade associations (varying in age, size and trade), were asked about their information services. It indicated that, whilst many of the

associations collected their members and government statistics, few collected primary data.

4.1.1 Study of Horticultural Trade Associations

INTRODUCTION

Seventeen horticultural trade associations were identified from a number of sources. Thirteen represented manufacturers, two retailers, one wholesalers and one all these trades.

Initially, personal interviews were to be carried out with all these associations. Seven visits were completed in the period, 15 June to the 22 June 1982, just prior to a national rail strike. It was envisaged that the industrial action would constitute a prolonged dispute and, therefore, a questionnaire was drawn up from the checklist used in the interviews.

METHOD

As recommended by Payne (1964) all associations were first contacted by telephone and the most senior or most relevant official was sought. Personal contact was seen as being very important because it was then possible to explain the precise nature of the information being sought, why it was required and what the association might ultimately gain from co-operating (Varble 1973). Originally, the telephone conversation was used to secure an interview but after the decision had been made to use a mailed questionnaire it was used to persuade the respondent to complete the document.

The checklist used in the interviews considered both the internal and external structure of associations (Table 23). Many of the questions were used were similar to those used by Dunham (1971) who studied the structure and

activities of American food-industry associations.

Table 23: Checklist Used for the Trade Association Survey

STRUCTURE OF ASSOCIATION NETWORK

(1) Name of association and date of origin
(2) Why the association was formed and its initial activities
(3) Present purpose and activities and their relative importance
(4) Most significant contributions to the Industry
(5) Links with any other organisations
(6) Links with the Garden Industry, number of members dealing with Garden Products, Garden committees
(7) Size of the association (i.e. number of members)
(8) Eligibility for membership
(9) Percentage of those eligible who are not yet members. Any differences between members and non-members.

INTERNAL STRUCTURE OF ASSOCIATIONS

(10) Number of staff of the association
(11) Budget
(12) How subscription fee arrived at
(13) Contact with members and changes in aims and activities in the last ten years
(14) Commitment to marketing research services, the types undertaken and why, the amount spent. The reasons if none is undertaken.

The responses to the interviews were used to design the questionnaire (Appendix Four). For example, respondents' reluctance to divulge financial matters led to the use of turnover bands and the placing of such questions toward the end of the questionnaire (Oppenheim 1966).

Questionnaires were mailed on 8 July 1982 with a covering letter typed on G.I.M.A. notepaper to authenticate the study (McKenna 1978). Only one association did not return the questionnaire but they did provide much of the information needed (Appendix Four). The results are used to describe the two main factors - fragmentation and

internal structure - limiting co-operative market research activity in trade associations.

RESULTS

Fragmentation of the Association Network

Recent years have seen a rapid growth in the numbers of trade associations and in particular, horticultural trade associations (Graph 2).

The early bodies were formed to protect trade but in latter years objectives have centred on promoting the interests of members. The associations' activities (Table 24) reflected these aims as did their most significant contributions to the industry. Interestingly, almost half the respondents considered some form of co-operation to be their main contribution.

Graph 2 : Growth of Horticultural Trade Associations

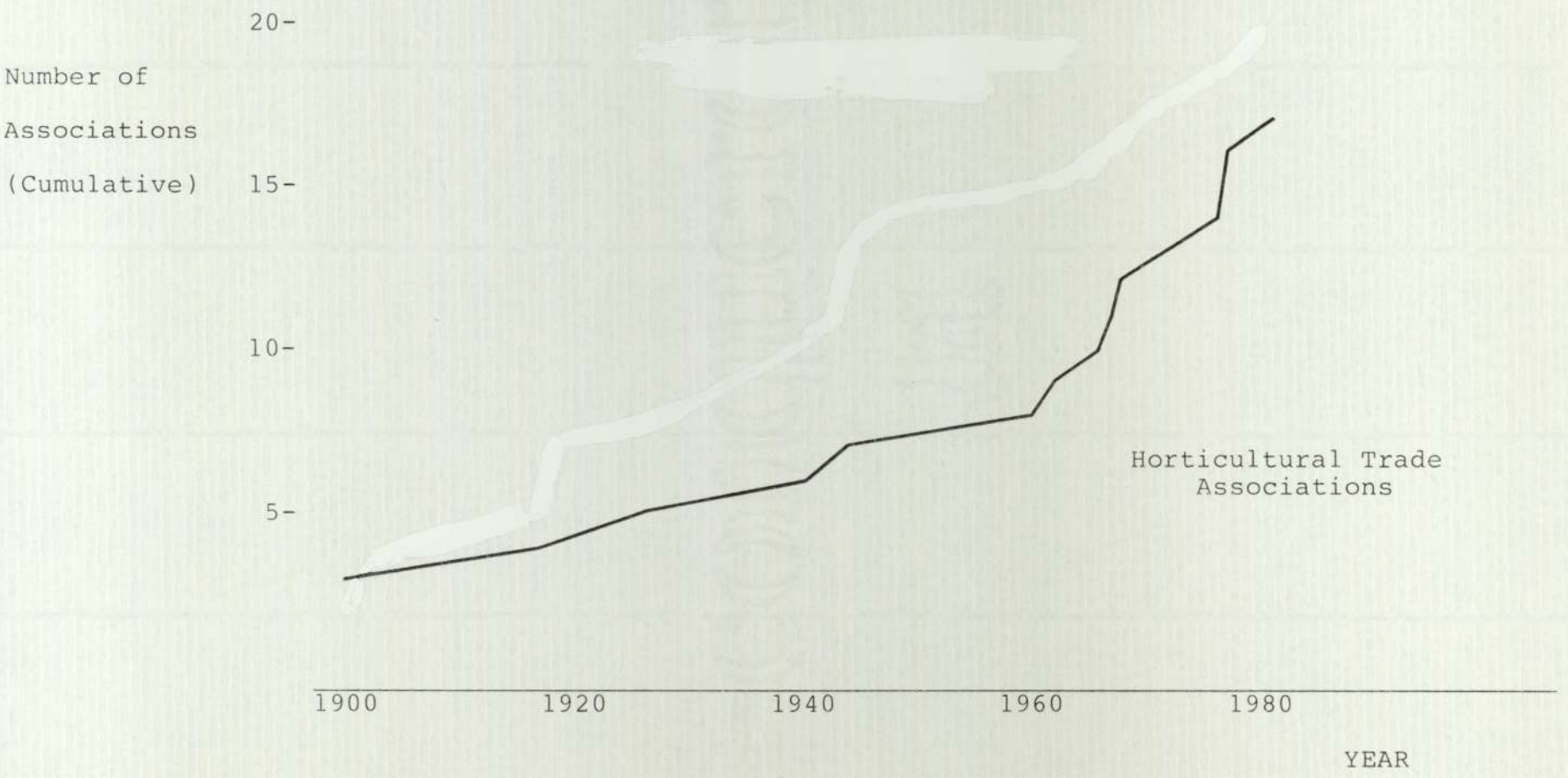


Table 24: The Activities of the Associations

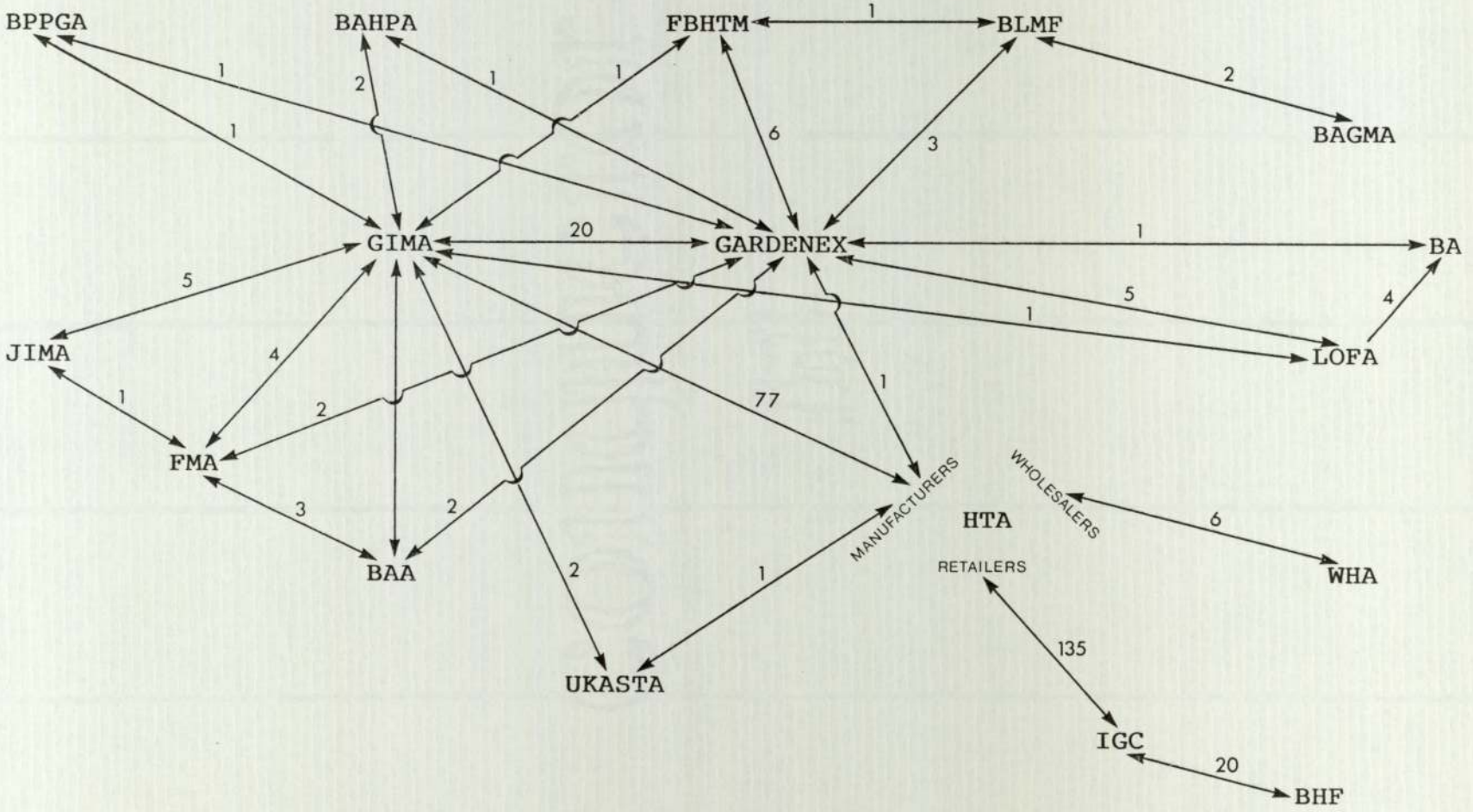
ACTIVITY	NUMBER UNDERTAKING ACTIVITY
Trade Promotion Meetings Representations to Government	8
Public Relations and Information to the Public	5
Information to Members Representations to Bodies other than Government	4
Marketing Research	3
Education/Training Standards	2
Trade Visits Abroad Business Services	1

As well as similarities in their aims and activities, many associations shared the same potential members; one measure of this being their qualifications for membership (Table 25). In the manufacturing sector, where the competition for members was the greatest, fourteen associations shared only 603 different firms, almost 25% of whom were members of more than one association (Figure 9). Although there was only a small number of companies who were members of an association Table 26 indicates that many of the manufacturers' groups could have greatly increased their members' numbers.

Table 25 : The Qualifications for Membership of Different Associations

ASSOCIATION NAME AND ABBREVIATION	CRITERIA FOR MEMBERSHIP					
	TRADE	PRODUCT SECTOR	BRITISH	SPECIFIED TURNOVER	SPECIFIED AGE	SPECIFIED STANDARD
Barbecue Association (BA)		Barbecues		+		
British Agricultural Association (BAA)		Agrochemicals	+			
British Agricultural & Garden Machinery Association (BAGMA)		Agricultural Machinery				+
British Agricultural & Horticultural Plastics Association (BAHPA)		Horticultural Plastics				
British Lawnmower Manufacturers' Federation (BLMF)		Lawnmowers	+			
British Pot Plant Growers' Association (BPPGA)	MANUFACT-URERS	Pot Plants	+	+		
Federation of British Hand Tool Manufacturers (FBHTM)		Hand Tools	+			
Fertiliser Manufacturers' Association (FMA)		Fertilisers				
Garden Industry Manufacturers' Association (GIMA)		Garden Hardware (inc. seeds)	+		+	
John Innes Manufacturers' Association (JIMA)		JI Compost				+
Leisure and Outdoor Furniture Association (LOFA)		Garden Furniture				
United Kingdom Agricultural Supply Trade Association (UKASTA)		Seeds	+			
British Hardware Federation (BHF)	RETAILERS	Hardware			+	+
International Garden Centre (IGC)		All Garden Goods	+	+		+
Wholesale Horticultural Association (WHA)	WHOLESALERS	Garden Sundries				
Horticultural Trades Association (HTA)	ALL TRADES	'Live' Goods				
Federation of Garden & Leisure Equipment Exporters (GARDENEX)	EXPORTERS	All Garden Goods	+			

Figure 9: The Membership Links Between the Associations



Numbers denote common members

Table 26: The Growth Capacity of Manufacturers' Associations

ASSOCIATION	NUMBER OF MEMBERS	NUMBER IN THE GARDEN INDUSTRY	PERCENTAGE OF POTENTIAL NUMBERS WHO ARE MEMBERS+
B.A.	5	5	60
B.A.A.	49	13	95
B.A.G.M.A.	947	379	85
B.A.H.P.A.	46	9	20
B.L.M.F.	13	13	90
B.P.P.G.A.	21	16	67
F.B.H.T.M.	96	8	*60
GARDENEX	71	71	*50
F.M.A.	32	16	*75
G.I.M.A.	77	77	15
H.T.A. (manufacturers)	108	108	33
J.I.M.A.	26	26	80
L.O.F.A.	45	29	70
U.K.A.S.T.A.	11	11	80
TOTAL	1547	781	47

+Assumes % for whole association holds true for garden sector

*Approximations based on membership lists

Internal Structure of Associations

Most of the Associations were run by full-time staff and had budgets of below £50,000 per annum (Table 27).

Table 27: Association Staff and Budgets

ASSOCIATION	TRADE	STAFF		ANNUAL BUDGET (£'000s)
		FULL-TIME	PART-TIME	
BA		0	1	Below 10
BAA		5	0	100-500
BAGMA		15	2	100-500
BAHPA		0	1	Below 10
BLMF		0	2	Below 10
BPPGA	Manufacturers	0	1	Below 10
FBHTM		Not available		
FMA		5	2	Not available
GIMA		1	0	10-50
JIMA		0	2	Below 10
LOFA		4	0	10-50
UKASTA		2	0	Below 10
BHF	Retailers	50	15	Above 500
IGC		1	3	50-100
WHA	Wholesalers	0	1	Below 10
HTA	All Trades	9	3	100-500
GARDENEX	Exporters	0	3	10-50

Communication between association staff and members generally occurred through local or specialist committees which met either once or twice a year. However, over half the associations representing more than one industry did not have a committee representing the garden trade. As a measure of how in touch the associations were with their members' needs they were asked if changes in their aims or activities had occured in the previous ten years. Three bodies had changed their aims leading to a broadening of

their activities and many more had just increased their activities; particularly in the marketing fields.

Nine associations undertook some kind of market research (Table 28), the most common source of regular statistics being from member and Government sources.

Table 28: Market Research Activities of Horticultural Trade Associations

ASSOCIATION	SOURCE AND TYPE OF STATISTICS PROVIDED
BA	MEMBERS' annual sales turnovers
BAA	MEMBERS' annual production statistics
BAGMA	MEMBERS' warranty, income/expenditure and employment data
BAHPA	None
BLMF	None
BPPGA	SURVEY of attitudes towards pot plants, their availability and the value of modification costs
FBHTM	GOVERNMENT Import/Export and Business Monitor data, RETAIL AUDIT undertaken once
FMA	MEMBERS' annual statistics on fertiliser application rates, GOVERNMENT M.A.F.F. figures
GIMA	None
JIMA	None
LOFA	None
UKASTA	None
BHF	MEMBERS' sales, profits, staff, wages and stock figures, market SURVEY undertaken once
IGC	None
WHA	None
HTA	Wages SURVEY undertaken once
GARDENEX	GOVERNMENT figures on foreign economic climates collected. Ad-hoc SURVEYS on trading movements in foreign markets

Five bodies had carried out surveys or retail audits in the past but none were on a regular basis. The British Hardware Federation's 'Hardware goes to Market' survey was sold to members for £2. Its failure to sell, which was blamed on its low price and the apathy of members, led to

the study not being repeated. The retail audit undertaken by the Hand Tool Federation was also abandoned but this time the reason was one of high cost. Between them the nine associations undertaking market research services probably spent less than £20,000 a year on research. Only three of them provided these services at the request of their members.

Of those not carrying out any research the major reason given concerned the high costs involved. Only one (B.A.H.P.A.) had never discussed the possibility of providing a market research service and two (B.L.M.F. and W.H.A.) said that one was not necessary because of the research activities of individual members. The John Innes Manufacturers' Association felt that co-operative research might be difficult because large and small firms might want different information and U.K.A.S.T.A. felt that their staff were not sufficiently knowledgeable to overcome the problems of researching a market with a sale-or-return policy. Other association staff were also concerned about deciding what research was needed most, which market research company to use and generally about the costs and benefits of co-operative research. In order to reduce these concerns all but three of the associations were willing to co-operate further in an inter-association market research scheme.

DISCUSSION

The results showed that over half of the horticultural trade associations had been formed since 1960 (Graph 2). This rapid growth of trade associations had also occurred in other industries (Devlin 1972) although it had begun a decade or so earlier. It indicates that in recent years

companies have found it beneficial to unite to further their common interests and, in particular, to promote trade. Such needs have been caused by the changing pattern of world trade which has seen increases in both the flow of trade between markets and the number of countries manufacturing goods.

Many of the seventeen horticultural trade associations represented different product sectors but shared a number of common members (Figure 9). In fact, almost 25% of the total member-numbers belonged to more than one association, suggesting that the associations were unable to meet at least some of the needs of their members. Indeed, since over half of them were operating below 60% capacity, this also implied an inability to satisfy the needs of potential members.

Most of the associations had similar aims and activities and with many of them sharing the same potential members there was much duplication of effort. These aims and activities were similar to those of non-horticultural associations (Dunham 1971; Devlin 1972). Table 29, which compares Dunham's results to those of this study, shows that more horticultural associations changed their activities than the food associations and, although Dunham (1971) concluded that a lack of change in activity indicated asscociations were out of touch with their members' needs, a change in activity does not necessarily lead to need satisfaction. It may depend on the degree of communication between the association and its members since associations which held more frequent meetings and involved members in its management undertook a greater number and variety of activities than in other cases.

Table 29: A Comparison Between the Aims and Activities of American Food Associations (Dunham) and British Horticultural Associations

Food Association (n=76)	Horticultural Associations (n=17)
Main Objective of the Association	
To increase the economic returns of the members	To promote trade
Change in Aims in 10 Years	
40% said no change	69% said no change
Top Three Activities	
Representation to Government (59%) Trade promotion (32%) Education (29%) Research (24%) Information (24%) Trade Statistics (20%) Industry co-operation (13%) Public Relations (12%) Standards (12%)	Representation to Government (47%) Trade promotion (29%) Meetings (29%) Public Relations (29%) Information to members (24%) Representation to bodies (24%) Market Research (18%) Education and Training (12%) Standards (12%)
Changes in Activities in 10 Years	
65% said no change Of the 35% who said 'yes', 30% increased Government relations 15% increased education 11% increased public affairs	47% said no change Of the 53% who said 'yes', 33% increased commercial activities 13% increased representation to other bodies
In all cases this was accompanied by a broadening of the activities undertaken	
Marketing Research Activities	
5% ranked 'Trade Statistics' as their most important activity, 20% ranked it in their top three	0% ranked Market Research first, 18% ranked it in their top three
Most Significant Contribution	
46% were in legislative or regulatory areas 36% in intra-industry relations 32% in increased public acceptance of members products	44% were in intra- and inter-industry co-operation 19% in increasing standards and/or safety of products

However, this situation was restricted to two horticultural bodies (one of which was G.I.M.A.), the others meeting their members only once or twice a year. The dissatisfaction of members implied by the fragmentation of the associations network may, therefore, be because associations fail to communicate effectively with their members. They, therefore, do not undertake programmes which will satisfy existing and/or potential members.

One activity which was less developed in the horticultural associations than in the associations responding to the background study was the provision of market research services. This may have been because the average size of the horticultural bodies was almost half, and their median formation date twenty-five years later, than that of the earlier respondents (all of whom offered research services). Whilst there was little evidence of the effect of size and age on an association's ability to undertake research it seems reasonable to assume that smaller associations would have less funds, and newer ones may lack the procedures needed, to organise research.

Within the group of horticultural associations larger bodies were more likely to undertake the more expensive primary research. This was especially true of surveys which may require more organisation than collecting members' data (Crisp 1957). However, even relatively cheap and simple to organise research like interfirm comparisons or secondary data collection were undertaken by fewer associations than expected (Economic Development Committee 1967). This may have been because the associations lacked complete membership (making interfirm

comparisons difficult) and because the quality of the secondary data available was poor. Indeed, only five associations carried out interfirm comparisons and, as might be expected, their percentages of potential members joined were higher than average.

Concerning secondary data there was a lack of Government interest in collecting relevant data and even where statistics were collected they were often aggregated with that of other Industries making them less useful as a data base. This was shown by the fact that only three associations collected Government data none of which was directly related to the Horticultural Industry.

It may be because of the problems of using these less complicated and inexpensive techniques that associations were discouraged from starting a research service. This discouragement was evident from the number of uncertainties associations' staff held about undertaking research. In particular, many respondents were concerned about what research they should undertake, who should undertake it and what benefits it would provide. Most associations had few staff (nearly all of whom lacked market research experience) and budgets which were felt inadequate to cover the costs of research. Many staff also did not know where to obtain advice about the services they could provide.

By failing to discuss the idea of co-operative research, associations prevent members from appreciating the potential benefits of research and members may, therefore, fail to see a need for such a service. Such communication between the associations' staff and their members before undertaking research is crucial since a lack of

consultation can lead to the resultant research not being bought and/or accepted by the members (Opinion Research Corporation 1972). Certainly, when more expensive research was undertaken the horticultural associations did communicate more with their members, possibly because they required funding from them.

The fact that so many associations were willing to co-operate further in an inter-association market research scheme (Appendix Four) indicated a recognition of its need. In consideration of the problems mentioned, it appears that the first step needed to be one of intra-association communication to see if individual bodies should offer research services for their members.

CONCLUSIONS

The survey showed that the network of associations which represent the interests of firms in the Horticultural Industry is becoming increasingly fragmented. In the two years after the survey was undertaken in June 1982 four more associations and one Institute was formed. The fact that so many trade bodies shared a relatively small number of companies limited their financial capacity to undertake market research services.

In other industries associations are often able to offer relatively inexpensive services based on member, or Government statistics. Here too, the horticultural bodies were restricted by incomplete memberships and a lack of Government interest in horticultural goods. Fragmentation of the industry was, however, not the only problem. Some associations were limited in their research activities by the inexperience of their staff and their internal communication structure.

Despite some associations broadening their activities into the market research field, most did not consult their members before undertaking research services. The potential inadequacy of such services and the fact that over half provided no research at all may have discouraged members, through their lack of experience, from demanding co-operative research which satisfied their needs.

According to the respondents, by encouraging discussion the survey helped diminish some of their uncertainties about co-operative market research. In the two years following the study three associations began interfirm comparisons and two undertook consumer attitude surveys. It is believed that, in all cases, members were consulted.

Most association staff were willing to discuss inter-association research schemes further. However, the survey indicated that each association needed to first examine its own potential to provide research services before inter-association ventures could be attempted. In addition, G.I.M.A. recognised the need to attract potential members and satisfy existing ones and they, therefore, preferred not to co-operate so that they could offer a unique market research service.

4.1.2 Summary

Two factors appeared to limit the co-operative market research activities of G.I.M.A. - the fragmentation of the association network and G.I.M.A.'s internal structure. In the Horticultural Industry there were many trade associations with the same potential members as G.I.M.A. and each subsequently had limited memberships. This not only restricted the funds available for market research but also G.I.M.A.'s ability to undertake interfirm

comparisons. In terms of internal structure, quite apart from having a low budget, G.I.M.A. employed only one full-time staff. In addition, many of the association's decision makers (the Council) were uncertain about undertaking market research. Compared to other horticultural bodies, G.I.M.A.'s levels of communication with their members were good and many members participated in the management of the association. Despite this, however, no discussions about market research services had previously been undertaken.

4.2 G.I.M.A.'s FUTURE GROWTH

Chapter One considered the low growth rate of the G.I.M.A. membership. Aware of this and its potential to expand (Horticultural Associations' Survey), the G.I.M.A. Council expressed a wish to use the offer of a research service as a "recruitment lever." It was, therefore, necessary to study the research needs of potential G.I.M.A. members to see if they were different to those recorded for G.I.M.A. members (Chapter Three).

This research was undertaken by two groups of Aston University students at the Garden and Leisure Exhibition (October 1983). Their brief was to answer the following questions:

(1) Is market research required by potential G.I.M.A. member

(2) What information (if any) are these manufacturers looking for?

(3) What factors might affect their purchases of research?

(4) What approach should a market research

consultancy, interested in providing services for this market, take?

Group A interviewed 34 managers of different sized companies manufacturing barbecues, furniture, containers, netting or leisure products. Over half of the respondents felt that their company could benefit from more market research and certain information in particular (Table 30). There were no differences between the information needs of different sized companies but managers from larger firms often mentioned more than one information type and were more specific about what they wanted.

Some managers proposed factors which would affect their decisions to purchase data. In order of their frequency of mention these were cost, accuracy and detail, cash availability and reputation of the market research supplier.

Table 30: Information Types Wanted by Group A's Respondents

INFORMATION TYPE WANTED	NUMBER OF MENTIONS*
Market size and trends	9
Consumer attitudes to products, promotions, pricing or packaging	8
Relative importance of different outlets	5
Consumer attitudes to new products	3
Information on competitors and products	3

* Some answered more than one

Nearly all of the 15 companies who did not want more market research employed less than 51 people. Many of their managers felt that they received adequate market feedback from their sales representatives and in-house research. Indeed, the fact that only 15% of all respondents said they would use external research agencies to gather market data was just one indication of market researchers' poor image. Another was the frequent accusation that researchers did not understand the garden market and their research was poor value for money.

Group B interviewed 41 managers from various sizes of firm manufacturing chemicals, fertilisers, peat, compost, bulbs/seeds or tools. They gave their respondents a list of information options from which to choose and then rank (out of ten) for importance. All companies wanted some kind of data and again market size data was the most important (Table 31).

Table 31: The Importance of Different Information Types to Group B's Respondents

INFORMATION TYPE	NUMBER OF MANAGERS CHOOSING OPTION	MEAN SCORE	DEVIATION FROM MEAN
Market Size	41	7.6	2.5
Most Favourable Outlets	41	5.9	2.7
Geographical Distribution of Products	40	4.7	2.6
Pricing	39	6.1	2.7
Types of Consumer	38	7.1	2.3
Product Attributes	36	6.1	2.8

Unfortunately, Group B failed to offer their interviewees an information type - consumer attitudes - which previous

studies had shown to be important (Group A and Chapter 3). However, they did ask their respondents which types of research they presently bought and the most frequently mentioned were consumer attitudes. One assumes that had this information type been offered its score would have been very high.

Again there was no relationship between company size or previous research use and the data managers thought were important. Three factors were thought likely to affect purchases of research. These were costs, inaccurate research and unreliable research companies. Group B researchers also found that managers' attitudes towards research were also important.

In recommending the best approach for a consultancy wishing to provide research services the two groups suggested that:

(1) strategies need to be developed to counteract the poor image of both market research and its suppliers,

(2) a consultancy should attain a thorough knowledge of the market in order to understand the problems faced by manufacturers in the Garden Industry, and

(3) a consultancy should either consider an education programme for the smaller companies or concentrate its efforts on larger ones which understand research better and are more favourably disposed towards it.

Overall the results of the two surveys were very similar and resembled closely those already documented for existing G.I.M.A. members. Most potential members

indicated an interest in market research although this was less true of Group A's respondents. This was probably a reflection on the research experience of these managers since their product markets were known to be greatly under-researched. Managers of small companies also tended to lack research experience and were unconvinced of its value for money.

Most managers wanted market size and consumer attitude data and, although these were not related to company size, previous users held more favourable attitudes towards research generally. As well as attitudes and research cost, accuracy and supplier reputation were also important factors influencing purchase decisions.

In summary the surveys indicated that the research needs of potential members were similar to those of G.I.M.A.'s existing members. The Association's growth, therefore, would not invalidate research undertaken on the basis of existing members needs providing account was taken of any natural changes in companies' research needs over the course of time.

SUMMARY

The last section and Chapter Three confirmed that G.I.M.A.'s members and potential members shared a need for market size data, the purchase of which was influenced by the cost and accuracy of the research and the reputation of its supplier. The next two sections consider some of the market research agencies working in the Garden Industry and some of the data they supply.

4.3 SUPPLIERS OF MARKET RESEARCH

Another factor influencing the research activities of

associations is the attitudes of research suppliers. Co-operative market research, just because of the number of companies involved, can be a more time consuming and risky undertaking for a research supplier than individual-client services. Consequently, some research companies may hold unfavourable attitudes towards co-operative research schemes.

There was little evidence from the Horticultural Trade Association survey that market research companies had done anything to allay the uncertainties felt by associations' staff about research activities. Since the research suppliers did not make themselves known to these staff (or to many of G.I.M.A.'s members) and the staff lacked the experience of knowing how to find them - the situation was one of stalemate.

The apparant inactivity of the market research suppliers compared to other, non-co-operative situations (Haynes and Rothe 1974) is perhaps best explained by three case studies. Each is used to focus on a different problem of co-operative market research. These are:

(1) the need to define the research required,

(2) the need for a co-ordinator, and

(3) the financial arrangements.

4.3.1 Case Study One: Research Definition

INTRODUCTION

In September 1983 G.I.M.A. Council decided to commission a secondary data reporting service. The service, called 'G.I.M.A. Futures', was provided by the Henley Centre for Forecasting which also produced 'Leisure Futures' (the document upon which this service was based). The Centre reported bi-yearly on economic and social trends and

changes in the garden market using Government data from the Family Expenditure Survey and Business Monitors. Although G.I.M.A. Futures contained market sizes and trends, which were wanted by the members, the data were aggregated into six sectors:

Plants, Shrubs, Seeds and Bulbs,

Chemicals,

Lawnmowers,

Tools and Equipment,

Greenhouses and Sheds, and

Garden Furniture.

This made the information not only less accurate but also less relevant to G.I.M.A. managers. In describing its service the Centre wrote:

> "The inherent practical difficulties of obtaining accurate statistics on market size are compounded by definitional problems. The proportion of purchases (whether lawnmowers, plant pots or trowels . . .) which can be attributed to domestic consumers is still largely one of informed estimates based on observation of developments in the market.
> As mentioned above, the problems of obtaining accurate statistical data necessitates placing several related market segments under six broad headings. Unfortunately by grouping together several markets with different growth rates, there is some distortion of the performance of the broad product categories."
>
> G.I.M.A. Futures, April 1984, p16

The service, which cost G.I.M.A. £6,000 a year (not including handling and postage), was paid for from G.I.M.A. funds and was undertaken by the G.I.M.A. Council without prior consultation with other members or the author.

The provision of G.I.M.A. Futures offered a unique opportunity to examine the reaction of all members to the

same piece of research and, thereby, put the factors they had said would affect their research purchases (Chapter Three) to the test. A survey was carried out at the Autumn Seminar 1983, two months after the first report had been published.

THE SURVEY

Twenty-four senior managers were chosen to represent a cross-section of opinion. The sample was based on information collected in Chapter Three about the size, structure and research use of the companies. Managers were interviewed using a supervised questionnaire approach (Table 32).

Table 32: The G.I.M.A. Futures Questionnaire

(1) Have you read the report Yes No

(2) Please rate the report on the basis of its:

Accuracy	1	2	3	4	5
	BAD				GOOD
Relevance to your Marketing Problems	1	2	3	4	5
Relevance to your Products	1	2	3	4	5
Understandability	1	2	3	4	5
Use/Actionability	1	2	3	4	5

(3) What monetary value would you put on this report? £.....

Four managers had not read the report and their only similarity was that they were all from companies that had used market research in the past. The other twenty interviewees rated the document's accuracy, relevance,

understandability and use on a five-point semantic-differential scale.

The results showed that most managers were fairly satisfied with the accuracy of the report (Table 33) because they considered the Henley Centre to be a reputable company.

Table 33: How Managers Rated Different Aspects of G.I.M.A. Futures (5 = good)

ASPECT OF THE REPORT	MEAN SCORE*	DEVIATION FROM THE MEAN
Accuracy	3.7	1.2
Relevance to your Marketing Problems	1.8	1.0
Relevance to your Products	1.8	1.0
Understandability	4.3	0.6
Use/Actionability	2.4	1.1

* Some managers marked points between integers

Some had no data for direct comparison but those who did said the report reinforced what they already thought about the market. None were surprised by its content and this may have been because the report lacked relevance to both managers' marketing problems and their products (Table 33). Whilst managers rated the document's understandability highly, the average score attributed to it use was below the mid-point on the scale.

In view of the low scores for relevance and use it was perhaps not surprising that only two managers valued the report above £50 and only one of them was willing to pay for the next edition from his company's funds. Both managers were from large multi-divisional companies with large research budgets. Almost half the respondents

thought the report was worth less than £10.

DISCUSSION AND CONCLUSIONS

Generally the managers who had read the report were satisfied the Henley Centre for Forecasting had accurately portrayed the data available. They found the information 'readable', 'understandable' and 'very interesting'. However, they felt that it lacked specificity and, therefore, it was not very relevant to most companies' products. Indeed, the fact that they thought the research accurate despite its irrelevance, shows clearly the importance of a supplier's reputation in influencing the perceived quality of its work.

Managers gave low scores for relevance, but the slightly higher scores for use/actionability may have been for two reasons. Firstly, some felt that whilst the data was not immediately useful, it was 'nice to know' and might become useful in the future. Secondly, the report provided a reference for some of the data available and was used, particularly by the multi-divisional companies, in preparing budgets and reports.

Despite the fact that most respondents unknowingly valued the document below its actual cost per member, they thought the service should continue providing it was still paid for out of G.I.M.A.'s funds. However, if managers were asked to pay directly or if an alternative service, which provided more relevant data, was offered most would not wish to continue with G.I.M.A. Futures.

In conclusion, the study showed that to satisfy the requirements of research users its suppliers must assess and take account of the factors affecting research purchases. In G.I.M.A.'s case, cost, accuracy and

relevance were all important and whilst G.I.M.A. Futures was relatively inexpensive the market sizes it provided were not adequately relevant. This resulted in the report being valued below its actual cost.

The difficulties of firstly identifying the needs of groups of co-operating managers and secondly, understanding the relative trade-off of those needs may discourage market researchers from taking on co-operative market research.

4.3.2 Case Study Two: Co-ordination

Another factor which may discourage market researchers is the lack of a co-ordinator to liaise between the co-operating group and themselves. In this case study, two Garden Centre managers had recognised the advantages of obtaining accurate information about other companies' methods of controlling stock and overheads. In conjuction with a management consultant, they approached the Horticultural Trades Association and the Manpower Services Commission who agreed to sponsor a year of information collection. A proposal was circulated by the H.T.A.'s director in 1982, and 30 of the 1300 members responded.

The participants were divided into two groups, both of which collected data on a whole range of key productivity measures. One group met at monthly intervals to discuss the figures and how they might be used to improve performance. The second group had to rely on postal and telephone contact. At the end of the study participants were sent a questionnaire to find out how useful the experience had been.

The study, which is described elsewhere (Clutterbuck 1984), indicated the importance of the consultant who

played an important co-ordinating and advisory role. For example, many of the respondents lacked the necessary experience of collecting data and required help to meet the monthly deadlines. Aid was also needed in turning the resultant figures into action. Attending meetings was clearly advantageous in this respect but several participants from both groups felt the need for more guidance than they actually received.

The scheme was later extended for another year with fifty-three participating companies. The consultants designed a 'self-help package' for the Horticultural Trades Association to run the scheme itself but they were still available for co-ordination and advisory help.

In summary, the study emphasised the usefulness of having a co-ordinator (who understood market research) to make the co-operative scheme run more smoothly.

The role of co-ordinator need not, as in this case study, be undertaken by an external party. The Greeting Card and Calender Association, which receives continuous consumer panel data from A.G.B. Attwood Limited, co-ordindates its activities through a number of committees. The Statistical Committee negotiates with the research supplier and the Publicity and Promotions Committee uses the data by efficient co-ordination with the Post Office. Whether the role is undertaken by the research supplier or its buyers it is clear that the co-ordination of co-operative activities is highly desirable to both parties.

4.3.3 Case Study Three: Finance

So far the case studies have all involved the co-operative activities of trade associations. This section, which considers the financial aspects of co-operative market research, still involves groups of manufacturers but not as members of an association.

Some co-operative research was co-ordinated by ICI Paints Division who had identified a need for information on the decorative order of British homes. In order to lower their own costs their research division advertised (Hardware Trade Journal, 8 July 1983) the proposed survey and fifteen companies, which varied in size and product field, arranged to participate in the scheme. These companies not only varied in the type of data they actually needed but also in their understanding of the use of the information once they had received it. This raised two questions (a) who should advise the participators needing help and (b) how much should each be required to pay?

The advice was given by ICI personnel and the costs agreed individually according to the number of survey questions asked, their complexity and the amount of executive time used (this included giving advice). Small companies benefitted in two ways. Firstly, the price of executive time was often valued according to what the company could reasonably be expected to afford. Secondly, payments for the research could be staggered throughout the course of the study.

The flexibility of these arrangements were only possible because of the resources of the ICI Group (in terms of money and personnel) and the fact that the co-operative

group was relatively small.

Other co-operative schemes have approached the problem of finance slightly differently. Retail Audits Limited ran audits for a group of manufacturers of hair-care products. The five companies were co-ordinated by the Market Research manager of one participant company and each had its own R.A.L. executive to advise them. The total cost was divided into five portions despite the fact that each manufacturer received different data. If one participator pulled out of the scheme the remaining four were obliged to pay one quarter of the total cost. As had happened in another case, involving garden tool manufacturers, it can become cheaper for the remaining companies to seek data individually.

The problems of financing co-operative ventures have been tackled in various ways. Some schemes have failed and market research suppliers have become wary of similar undertakings preferring to deal with companies individually.

4.3.4 Summary of Case Studies

These case studies illustrate some of the co-operative work that has been undertaken by associations and research suppliers involved in the Garden Industry. They indicate a few of the difficulties of undertaking co-operative research and explain (at least in part) why some research suppliers may be reluctant to organise co-operative schemes.

To encourage potential suppliers it appears that associations need to:

(a) define their members' research needs,

(b) nominate a co-ordinator - preferably someone

with knowledge of research methods, and

(c) decide how a co-operative scheme would be financed.

These may be difficult undertakings in view of associations' lack of experienced personnel. However, even having negotiated these hurdles association staff still need to identify an appropriate market research supplier. Since there are no lists of suppliers who have experience of researching the Garden Market this too may constitute a difficult task. This problem is considered again in the next Chapter.

4.4 Defining the Nature of Available Statistics

Before undertaking any research service, trade associations are advised (e.g. Wage 1961) to examine existing market data for their potential to satisfy the research needs of their members. Since the major research need of the G.I.M.A. members was for market size data comments about the existing sources will concentrate on this area. Most of the sources reported in what follows were located by library research and from Trade Journals, but a few of the more expensive and confidential reports were provided by G.I.M.A. members. The statistics which came from these sources can be considered under three headings: syndicated services, Government statistics and other published sources (Crimp 1981).

4.4.1 Syndicated Sources

These sources include the more expensive methods of collecting data, for example, retail audits, consumer panels and surveys. Most G.I.M.A. managers were confident about the accuracy of these sources. However, some were

concerned about the small sample sizes of both consumer panels and surveys and the incomplete outlet coverage for retail audits (Chapter Three). It seems reasonable to assume that the low utilisation of these methods by G.I.M.A. companies (Appendix One) was because of their high cost and/or managers' lack of awareness of their uses.

4.4.2 Government Data

The sources of Government statistics range from general digests, for example 'Social Trends', to the more specific 'Business Monitors'. The main problem for Garden Industry manufacturers using these sources is that they do not recognise horticultural goods as a separate market. Therefore, no data exists for products which are used only in the garden (for example, gnomes) and data are combined for products which have other uses as well. For example, data on spades not only includes statistics for garden spades but also for spades used in the Construction Industry. Another problem with Government sources is that the data are often incomplete, making trends difficult to follow.

The effect of these problems on the use of Government data was clear from managers' opinions of them. Stage One results and the previously discussed G.I.M.A. Futures Study (a report which was primarily based on Government sources) both showed that managers felt the data was not relevant to their products. Indeed, only one-fifth of the managers had used any Govenment data in the previous five years (Appendix One).

Attempts by the author to encourage the Department of Trade and Industry to separate data on garden products

from other goods were unsuccessful. The main obstacle to this was that the "Monitors" had recently been aligned to European specifications and there were no plans to change them again.

4.4.3 Other Published Sources

A wide variety of other sources are available to Garden Industry manufacturers including reports from a number of market research agencies, Gardening from Which? and data from trade associations. Some manufacturers' estimates are also available from trade journals. In terms of their provision of market size data some of these sources cover the whole market but most (particularly data from trade associations) consider only part of it.

Table 34 compares four sources which purport to cover the whole market. Each uses a different classification of products and one of the problems of drawing up the table was in defining the products which comprised each category. Since the descriptions from the source reports were too vague the companies concerned were contacted directly. Some of their executives found it difficult to define each product group and further enquiry led to the discovery that certain product markets had been omitted from the totals. In addition to this problem and the difficulties of comparing data based on different classifications, doubt exists over the independence of the sources. All the companies providing this market data denied being strongly influenced by the others, each saying that they used a variety of secondary sources. With the scarcity of relevant Government data and with little other data available, it seems probable that the sources are interdependent.

Another factor - the accuracy of these data - could be considered by comparing them to data derived from different methods of data collection. Manufacturers' estimates of market sizes can only be used for comparisons if manufacturers' selling prices (m.s.p.) can be converted to retail selling prices (r.s.p.) which are used in all research reports. The conversion requires details of the discount structure of each product market which were available from a confidential survey undertaken by G.I.M.A. in 1980. Comparisons between figures at r.s.p. showed that the manufacturers' estimates were generally much lower than those from the published sources described in Table 34. In one case the difference was three hundred per cent. With these variations in the classifications, market estimates and methods of data collection, it is, therefore, difficult to make a useful statement about the accuracy of the published sources.

Perhaps more important than any real inadequacy of the data were G.I.M.A. managers' opinions of the data. Most had little confidence in their accuracy and criticised their lack of product relevance (Chapter Three and Section 4.3). Classifications of garden goods were inadequate they said, not only because they failed to cover some market sectors but also because of the aggregation of data to larger and less relevant data sets. The classifications were also thought in some cases to be inaccurate since, for example, all of them defined 'Peat' as a 'Growing Medium', evidence to G.I.M.A. managers that the researchers did not understand the Garden Market.

Table 34: A Comparison of Data from Four Published Sources (1982 £m)

	SOURCE OF MARKET SIZE DATA			
PRODUCT MARKET	MINTEL	MRGB	KEYNOTE	HENLEY CENTRE
SHEDS	20m	16m	20m	) 51m
GREENHOUSES	24m	28m	) 30m	)
-ACCESSORIES	5m	Omitted	)	
CHEMICALS	33m	24m	Omitted	)
FERTILISERS/ PEAT/COMPOST	65m	71m	70m	)100m
FURNITURE	40m	38m	40m	) 52m
BARBECUES	8m	Omitted	10m	)
PLANTS/SHRUBS	112m	88m	185m	)
HOUSEPLANTS	75m	Omitted	70m	)
SEEDS	25m	30m	) 60m	) 271m
BULBS	25m	30m	)	)
LAWNMOWERS	93m	105m	100m	100m
HANDTOOLS	42m	44m	30m	)
POWER TOOLS	20m	31m	13m (includes equipment)	)
HOSES	) 15m	) 13m	15m	) 66m
-ACCESSORIES	)	)	Omitted	)
BARROWS	3.5m	3m	2m	)
SUNDRIES	Omitted	9m	5m	)
TOTAL MARKET	605.5m	530m	650m	640m

The inadequacy of the classifications, or at least the belief in their inadequacy, outlined a limitation on G.I.M.A.'s research activities. The importance of the product relevance of data has been mentioned many times and it was concluded that a new product classification, which was acceptable to G.I.M.A. managers, was required. The construction of this new classification is considered

in Chapter Five.

4.5 CONCLUSIONS

Both external and internal forces limited G.I.M.A.'s capacity to undertake co-operative market research. There were three external factors at play.

Firstly, the fragmentation of the association network restricted member numbers and therefore limited (a) the funds available for research and (b) the usefulness of interfirm comparisons. Secondly, the nature of available statistics limited their use as a source of low cost data and thirdly, many market research suppliers were reluctant to organise co-operative activities. Another external factor which was a potential problem concerned the research needs of non-members. The needs of a variety of garden product manufacturers were found to be very similar to those of G.I.M.A. members. Thus, the possibility that an expansion of G.I.M.A. might invalidate the co-operative research proposal was not seen as a problem in this case.

Internal factors included G.I.M.A.'s lack of staff experienced in market research methods. Potentially this would have restricted G.I.M.A.'s ability to (a) define members' research needs, (b) provide a co-ordinator for co-operative activities and (c) select a method of financing a scheme. In addition, since no list of experienced research suppliers existed, G.I.M.A. was also restricted in its ability to select an agency from whom to seek advice or co-operation about collecting the market research they required.

CHAPTER FIVE

IMPROVING THE ASSOCIATION'S CAPACITY TO UNDERTAKE CO-OPERATIVE RESEARCH

The last Chapter examined situational factors which might influence G.I.M.A.'s research activities. Important factors included:

(a) the fragmentation of the Association's network,

(b) uncertainty felt by Council members about undertaking research services,

(c) the lack of communication between the Association's decision makers and members about market research,

(d) the reluctance of some market research agencies to organise co-operative activities, and

(e) the lack of available statistics.

This Chapter considers four strategies to diminish the limiting effect of these forces and, thereby, improve the likelihood of G.I.M.A. undertaking research.

The first strategy was to develop the communication links between G.I.M.A. Council and the members to facilitate discussions about co-operative market research. This development also served to diminish some of the uncertainties faced by Council members including what research could be undertaken and the reaction of members to a co-operative research service.

Another uncertainty faced by Council members concerned the choice of market research supplier. One important factor which determines this is a supplier's experience of researching the garden market (Chapter Three). The second strategy was, therefore, to identify companies with

relevant research experience.

Throughout the investigation G.I.M.A. managers consistently reported the need for information which was relevant to their product markets. Most managers felt that the definitions of product markets in the Industry were inadequate (Chapter Four). The third strategy planned to improve this situation by defining products in a way which was acceptable and relevant to G.I.M.A. managers.

These three strategies considered ways of improving G.I.M.A.'s ability to provide a research service of maximum potential benefit to its members. Their implementation reduced the risk of undertaking a service. The final strategy considered another method of risk reduction, that of decreasing the costs of research.

5.1 STRATEGY ONE: IMPROVING COMMUNICATION BETWEEN THE MEMBERS AND COUNCIL

Evidence from Chapter Three indicated that many G.I.M.A. members were unaware of the benefits of research. It was perhaps because of this that they failed to demand a service of their association who, in turn, failed to recognise the need to provide one. The initiative for a research service must, therefore, come from the association. Apart from promoting the idea and educating members in the use of research (Kapferer and Disch 1964) associations need to assess their members' research needs (Case Study One, Chapter Four). Since many associations meet their members infrequently (Trade Associations Survey) association staff are well advised to run a concurrent programme of research education and feedback to

help them plan for problems they may face later.

An all-day Seminar was organised for G.I.M.A. members in December 1982 with a view to achieve three objectives:

(1) to introduce managers to research methods and data and some of their uses in company management,

(2) to generally promote the idea of a co-operative market research service, and

(3) to give managers the opportunity to voice their opinions about the association undertaking a service.

5.1.1 Education in Market Research

To illustrate the different types of research available various educational aids were used. These included providing managers with an information booklet, showing slides and displays and inviting speakers from Industry

In designing the booklet (Annex One) the author took into account enquiries received from members in the previous year. These often concerned:

(a) the availability of secondary data and where to obtain such material, and

(b) the types of market research used by other firms in the Garden Industry.

Two of the more complicated research methods, consumer panels and retail audits, were considered in some detail in the booklet. The slides and displays were used to illustrate the differences between the methods of collecting data (for example, Table 35 and Plate 1).

Table 35: A Comparison of Research Techniques

MARKET RESEARCH TECHNIQUE	AMOUNT OF QUANTIT -ATIVE DATA	AMOUNT OF QUALIT -ATIVE DATA	FREE FROM USE OF MEMORY	COLLECTS TREND DATA	COVERS WIDE PRODUCT RANGE	HANDLES LARGE NUMBERS OF PRODUCTS	EASE OF CHANGING DATA COLLECTED	RELATIVE CHEAPNESS	COST-SAVING AS INCREASE PRODUCTS COVERED
	*		*	*					
RETAIL	*		*	*	*	*			
AUDIT	*	*	*	*	*	*	*	*	*
	*		*	*	*	*			
	*		*	*	*	*			
	*		*	*		*			
CONSUMER	*		*	*		*			
DIARY	*	*	*	*	*	*	*	*	*
PANEL	*	*	*	*	*	*	*	*	*
	*		*	*		*			
		*							
		*							
SURVEY	*	*	*	*	*	*	*	*	*
	*	*			*	*	*	*	
		*							

Plate 1 : Market Research; A Picture of the Garden Market

In inviting speakers from Industry, managers were chosen rather than market research company executives for three reasons. Firstly, many research executives have a limited experience of different research methods and a broad view was thought most desirable. Secondly, some executives might have used the opportunity to 'sell' their company's research and this was incompatible with the aims of the Seminar. Finally, researchers tend to use jargon some of which may not have been understood by the audience.

The first speaker - the Group Product Manager of Fisons Horticultural Division - represented the view of the large manufacturer. He described a number of research methods and many of their uses. It was his experience that retail audits were 'probably the most reliable method of data collection for the Garden Industry', but he added that consumer diary panels accurately measured 'the Universe' and their costs were lower. In discussing the value of continuous research in the Garden Industry the speaker concluded that manufacturers need to:

(1) track market size and trends,

(2) monitor competitive performance, and

(3) measure trends in the size and importance of retail and wholesale distribution.

Without such data, he said, managers would lack guidance to make the right decisions.

The second speaker, the General Manager of The Fyba Pot Company, represented the view of the small manufacturer. He recounted a survey which he had undertaken in conjunction with Manchester University. He concluded that now he had used market research he valued its contribution and would continue to carry out similar surveys in future

years.

Whereas the first two speakers were from manufacturers of garden products, the last speaker was from a manufacturer of toys. It was thought important to obtain the view of someone outside the Industry and the choice of the toy market was based on the fact that both the Garden and Toy markets are highly seasonal and had extremely fragmented distribution. As considered in Chapter One these factors influence the ease of researching a market.

The Marketing Director of the toy manufacturer (the Mettoy Company plc) explained that:

> "market research is palpably incapable of solving intransigent business problems related to exchange rates and international competitiveness. On the other hand, all of us will make better business decisions if we understand the market in which we are trading and maintain a dialogue with our consumers."

After considering some pitfalls of attitude research the speaker conluded that:

> "G.I.M.A. are approaching it about right. Good co-operative research which is what the better research organisations like Nielsen and AGB offer the grocery companies is generally lacking to the more fragmented industries like yours and mine."

The three speakers answered many questions about their research experiences and about how other companies might tackle the problems they encountered. In accepting the speakers comments, G.I.M.A. managers seemed particularly impressed by practical examples of data from their own Industry.

5.1.2 Promoting the Idea of Co-operative Research

An important part of encouraging people to co-operate is to make them feel involved in the proceedings (Varble 1973). This was done at the Seminar by presenting managers with the results of the first all-member survey

(Appendix One). This enabled managers not only to compare their own research needs with those of others but, also, to see that their needs were to form the basis of a proposed service.

Managers were then given the opportunity to comment on the idea of G.I.M.A. undertaking a co-operative market research service. Most were in favour of such an undertaking and through discussion they agreed four essential characteristics of the service. These were that the scheme must be:

(1) operational within G.I.M.A.'s resources,

(2) flexible enough to meet members' research needs,

(3) able to collect data on all members products, and

(4) preceeded by research proposals which had been accepted by the membership.

More specifically, managers' comments concerned (a) who would finance the research (b) what advice/help would be given to aid managers' use of the data and (c) what type of research would be undertaken and how that would be decided.

In terms of financial proposals, few of the managers from the large companies were in favour of the research being paid solely from G.I.M.A. funds. This was because such an arrangement meant that the larger companies contributed more, as a result of their higher subscriptions, than the smaller ones. The most equitable solution was for a small sum to be paid from G.I.M.A. funds and the rest would be paid by each member according to the amount of data he received.

Views about the arrangements to help individual managers interpret the data were more disparate. The difficulty

was how such a service would be financed and whether it should be paid for by the group or by the individuals using it. It appeared that managers wished to have the facility to obtain advice, but did not necessarily wish to pay for it as a group because some felt they might not ever have need of it.

Other questions also addressed at the Seminar concerned what research was going to be undertaken and how this would be decided. Managers were assured that further research would take place to find out more about their information needs and a proposal would be presented to them before a service was undertaken.

5.1.3 Summary

The press articles (Exhibit 2) indicate that the Seminar succeeded in introducing managers to market research and promoted the idea of co-operative market research. The managers' reactions to the idea were, on the whole, favourable but there were three areas of concern. These involved the financial and advisory arrangements and the process by which the specific nature of the research would be decided. These areas were discussed and some useful suggestions made.

Exhibit 2 : Press Articles About the Research Seminar

GIMA seminar assesses need for further market research

Wanted: the market facts behind the garden goods trade

MEMBERS of the Garden Industry Manufacturers Association may be asked to give a commitment to co-operative market research in the coming year, delegates to GIMA's autumn seminar at Crick on December 9 learned from their chairman Edgar Ward. This follows from a three year study into the subject at Aston University now being conducted by post-graduate Penrose Courtney-Wildman with the support of GIMA.

That GIMA members want and need market research data is evident from the survey of members by Miss Courtney-Wildman. This showed that while some 79% of members received some market data on the garden industry in the past five years, 50% received this erratically, (less than annually), but that 98% wanted market data in the future. Nearly all wanted information on market sector values but there was no significant difference in numbers wanting retail or consumer data; the main breakdown of information needed was on product or brand sales.

The seminar which looked at the question of market research was led by Miss Courtney-Wildman, who set out to convince delegates that co-operative market research was the best way to get the information they needed at the lowest cost.

Market research was all about understanding the market, and then ensuring that you had the right product at the right place at the right time. But it was necessary to have continuous research to obtain meaningful data, she said.

Ian Buchanan, Group Products Manager for Fisons, agreed that market research was vital in the garden market. No company could plan objectively unless they invested heavily in market research, he said.

Looking at the garden market in particular he said that there were a number of problems to overcome. It was not a large market compared to other industries, and it comprised a number of small production units selling to a large number of outlets. The industry was also fragmented in distribution and the cost of getting to some 31,000 retail outlets was becoming prohibitive.

Lawnmowers	£47m	Department Stores	4%
Hardy nursery stock	£43m	F. W. Woolworth	9%
Chemicals/ fertilisers	£39m	Co-op	3%
Houseplants	£32m	Asda	4%
Garden tools	£15m	Tesco	2%
Garden furniture	£14m	Other Grocery	5%
Bedding plants	£14m	DIY Multiples	5%
Seeds	£11m	Garden Centres	21%
Bulbs	£10m	Garden Shops/Hardware Shops	23%
Greenhouses	£10m	Nurseries	6%
Garden sheds	£8m	Allotment and Garden Society	9%
Hoses and accessories	£4m	All Others	9%
Wheelbarrows	£1.5m	(Garden Products Source of Purchase—Attwood, 1981)	
(Sales at MSP — Mintel 1981)			

Garden trade facts: left, size of markets; right, fragmentation of distribution. But both clearly illustrate the problems of obtaining meaningful — to individual companies — market research data, without spending a fortune. The very diversity of the trade, both in source and outlet, that gives the garden trade its strength, is the cause of the market research problem

Of the types of research he said that these fell into three broad categories, internal, independent and ad hoc. Of the first method, which relied upon the company's own sales statistics/salesforce reports, industry data and published data, this could be dangerous in long term planning unless other market criteria was taken into account. Published data also was only as good as the supplier could make it.

Of the continuous independent research by companies, retail/wholesaler audits and diary panels (consumer panels) were the most reliable. However retail audit was costly since with the large number of retailers, it was not possible to get to everyone and size of market was difficult to measure. The diary panel of consumers could give a more accurate picture of your universe (the size of the market) at a lower cost than retail audits, he told the audience.

Ad hoc research looked at concept/packaging, product testing, users attitudes, advertising awareness, and the trade (attitudes of traders to a product).

This was vital in getting the product right.

"We are in a leisure market which is going to grow," Mr Buchanan said, "and the industry needs a quantum leap in investment and performance. How else will you and I make the right decisions without reliable, independent data to guide those decisions?" he asked his audience.

Geoff Hall of The Fyba Pot Co agreed on the benefits of market research. His company had embarked on such an exercise, using consumer (face to face) interviews, and questionnaires, mailings and telephone calls, and gained some valuable information. Apart from pinpointing the type of customer buying the products it also enabled the company to build up a wider circle of new buyers who could provide feedback information. The scheme they applied was simple and comparatively low cost. It would certainly be used again next year.

CO-OPERATION COULD CUT COST OF RESEARCH

Testing the market

THE need for continuous, reliable market and marketing research is hightened in a fragmented, seasonal industry such as garden and leisure — but because the industry consists of so many small sectors with differing requirements the cost to individual companies could be high.

These facts emerged strongly from a Garden Industry Manufacturers' Association seminar in Rugby.

However, a year ago GIMA began a marketing research project in conjunction with Aston University, Birmingham, sponsoring post graduate student Miss Penrose Courtney-Wildman, who explained to the seminar that the project's aim was to examine the feasibility of co-operative research.

Reporting on the first year of her three-year sponsorship, Miss Courtney-Wildman said that one of the problems of marketing research in the garden industry was to discover what information members needed most.

To help solve this, a questionaire had been sent to all GIMA members, more than 75% of whom had replied. Results showed that 93% of members wanted information about market sector values and she hoped to be able to pinpoint the most effective way of obtaining it, she said.

As part of the programme presented by Miss Courtney-Wildman, Fisons' product group manager Ian Buchanan outlined the problems of researching the garden market. The small-sized and seasonal markets, fragmented distribution and low frequencies of purchase all made it expensive, said Mr. Buchanan.

Co-operation was a vital factor in solving the cost problem. So far as market sector values were concerned, in his opinion consumer diary panels were the only way of accurately measuring market sizes.

Giving his perspective view fro the toy industry, Richard Hall of the Mettoy Company, described as a fallacy the view that manufacturers could do without market research.

"It is like radar — it does not usurp your job as pilot, but I'd hate to think that any flight I was on was being determined by guess and by God," he commented.

Penrose Courtney — Wildman, Edgar Ward (GIMA chairman), Richard Hall (Mettoy) and Ian Buchanan (Fisons) discuss market research.

How one firm benefitted

A GRAPHIC example of how a small company with limited finances can benefit from conducting its own market research was given by Geoff Hall, managing director of the Fyba Pot Company.

"A couple of years ago we felt the need for some professional research and engaged a group of post graduate students and a tutor from Manchester Polytechnic on a low-cost basis," he explained.

Among information required was the ages of customers, their social status, their opinions of Fyba products, what they used them for and opinions of the trade as a whole on the products. However, this data would have been useless unless it was relative to similar information about other companies.

"Our team interviewed people anonymously at two large garden centres, one smaller one and a 'big shed' DIY outlet with strong gardening section. In addition we mailed 300-400 questionaires to consumers whose addresses were on file and made phone calls to 40 wholesalers.

"Much useful information was gathered which, when analysed, helped to improve our sales. For example we learned that our main customer group were married people of around 40, with the over-60s the second best group, and that 75% of them put gardening as their main interest."

"It was a very low-cost and effective exercise which is still helping sales because all those who took part are mailed bi-annually with colour brochures," Geoff concluded. "A great deal of work was put into the project but we are considering doing the same again this year."

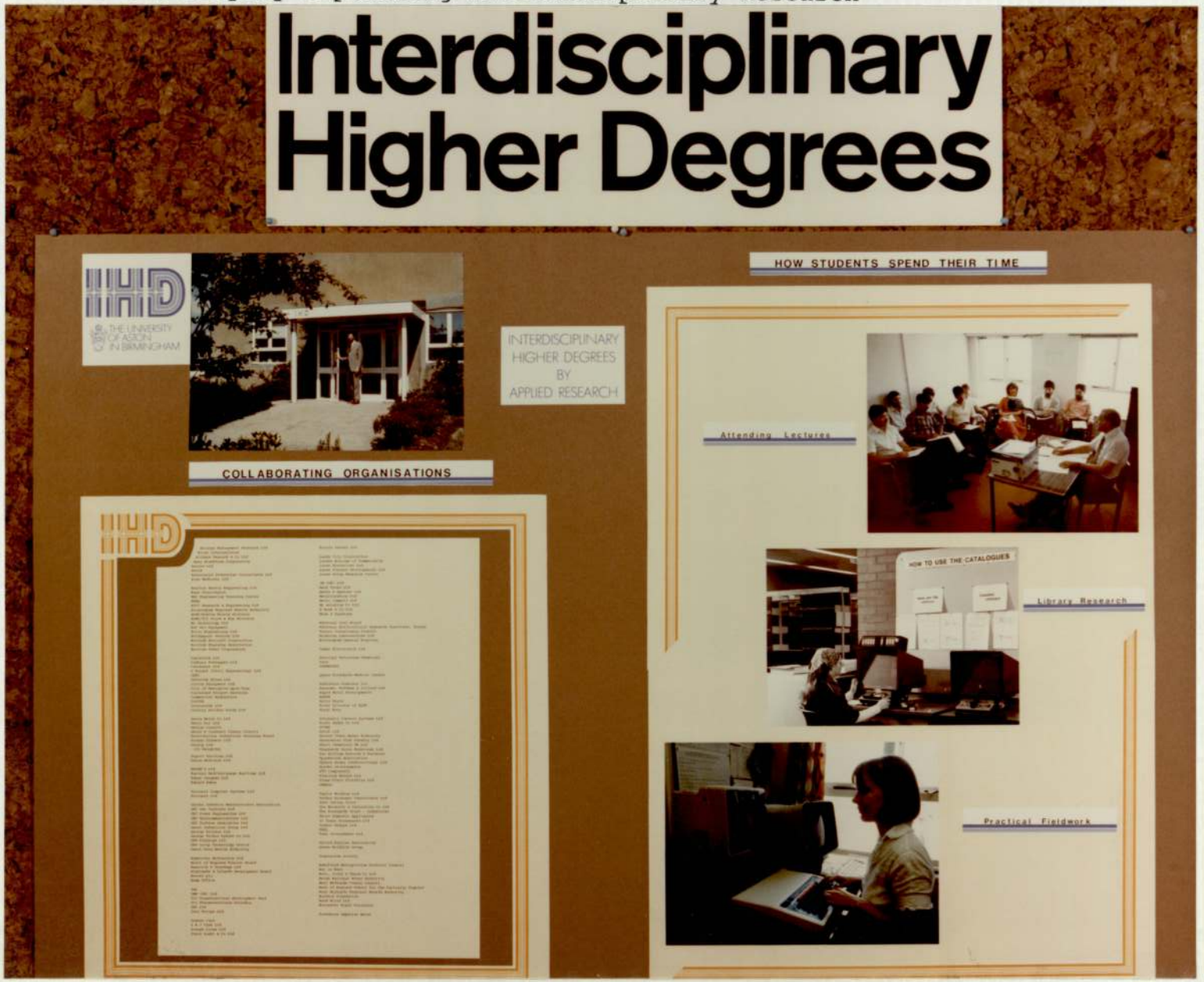
5.1.4 Other Communication

The extent of the communication between the author and the members was not restricted to this Seminar and the questionnaires reported in Chapter Three. Every March and December the author was called upon to speak to the members about the on-going research and, in the final year of the project, two further seminars were held. These seminars, which are described in Chapter Six, again involved a variety of communication methods including displays (Plates 2 and 3).

It was on these occasions that members had the opportunity to ask advice about research methods, their use and suppliers. Other opportunities to seek counsel arose at the trade shows and when the author visited company's premises.

Plate 2 : An Information Display of some Secondary Data and Research Findings

Plate 3 : A Display Explaining Interdisciplinary Research



Managers asked a variety of questions about market research and two companies' problems are briefly considered here as examples of managers' thinking behind their responses to the questionnaires (Chapter Three).

(1) The product-line of a small, owner-managed company - Garotta Products Limited - consisted in 1983/4 of a compost maker (which was their main revenue earner), an animal repellent and a compost bin. The Managing Director was concerned that his company was too dependent on the compost maker and he decided to develop the product-line. With the help of a group of M.B.A.'s the author was able to suggest a number of directions for development including fertilisers and chemicals. The Director then wished to examine the size, growth and competitiveness of each market. Secondary data, provided by the author, enabled him to reduce the choices but more accurate market size data were required to select lawn and rose fertilisers as having the greatest market potential.

(2) The Australian parent company of a high-turnover G.I.M.A. member - Croxden Compost Company - wanted to review diversification opportunities into the garden chemical market. The Marketing Manager sought advice from the author about inexpensive research which was available and about the cost and suppliers of more detailed market data. Market sizes and trends were used to identify potential opportunities to diversify and, as in the previous example, secondary data was useful in broad market terms but primary data was needed for product level decisions.

5.2 STRATEGY TWO: IDENTIFYING RELEVANT MARKET RESEARCH SUPPLIERS

By improving the communication between the Association and the members it was possible to reduce some of the uncertainties surrounding the decision to undertake co-operative research services. However, the problem of identifying potentially suitable market research agencies to carry out research still remained.

5.2.1 The Need to Identify Suppliers

As with most associations, G.I.M.A. had a limited staff capacity (in terms of number and research experience) to administer research. Even with an expansion of this capacity, or the use of members' staff as administrators, research agencies would still be required to collect the field data. Kapferer and Disch (1964) supported the use of agencies by suggesting that associations should, in view of their principles of neutrality and common utility of information, set the research function apart. The essential task was, therefore, to identify potential research suppliers.

5.2.2 Identifying the Suppliers

Most research suppliers are judged on the likelihood that they will provide accurate research and this is determined by their general reputation (G.I.M.A. Futures Study) and their specific experience of researching the Garden Market (Chapter Three). Locating suppliers with relevant qualifications can be a more difficult task for associations than for their members since members appear to identify relevant suppliers by asking competitors' advice (Chapter Three). This was despite the fact that some competitors are reluctant to recommend companies who

have knowledge of their products. Many research agencies specialise in researching certain products and/or use certain research methods, therefore, at the association level identifying all relevant suppliers can be difficult. Since there was no record, for the Garden Industry, of the experience of research suppliers their identification had to be achieved through a number of personal references.

Each of the research suppliers named was contacted by the author and their skills were summarised in a handbook called the "Who's Who in Market Research in the Garden Industry" (Annex Two). The handbook, which was sponsored by some of the contributors, was published in December 1984. It was distributed to all G.I.M.A.. members and, with external press coverage announcing its availability, it was free to any interested party.

Extensive discussions with all of the contributors revealed a general willingness to co-operate in setting up a research service for G.I.M.A.. Many were encouraged by the presence of a co-ordinator - in the form of the researcher - who they thought would improve communication and reliably assess managers' research needs.

5.2.3 Summary

This second strategy aimed to identify and record the experiences of the market research companies to see which would be suitable to support G.I.M.A. in undertaking a research service. In the process of making this information available to G.I.M.A. it was thought useful to document it for their members who faced similar problems in identifying relevant research agencies. The result was thought useful by the members and the G.I.M.A. Council decided to update the document in future years.

5.3 STRATEGY THREE: CLASSIFYING GARDEN PRODUCTS

Previous Chapters have noted the importance of both providing managers with information which is relevant to their products and the inadequate classifications of garden products used by market research companies. Just one example of the poor quality of these classifications was that many researchers considered peat as a growing medium when it is actually a soil conditioner. Such a criticism emphasised the need to classify products according to their similarity of use and this became the rationale behind a new product grouping.

5.3.1 Initial Attempts to Devise a Classification

In the process of talking to managers, at their company offices or at exhibitions, many product brochures were collected. From these brochures and three wholesalers catalogue's it was possible to gain a broad idea of the variety of goods in the Industry.

In order to aid the classification of these goods by their similarity of use, the Encyclopedia of Gardening (Huxley 1981) was used. Tools, for example, were firstly grouped into those for maintenance and those for cultivation and then divided further into smaller categories.

The first draft of the classification was taken to the Horticultural Training College in Birmingham where a variety of staff were asked their opinions. A number of alterations were suggested particularly involving the technical aspects of weedkillers, fertilisers and so on. The revised version was then sent to some G.I.M.A. managers for comment. After a few relatively minor amendments the final copy was sent to the whole membership with the first all-member survey (Appendix One).

Most of the comments about the classification centred on the importance of not grouping too many products together. For example, one manager thought seed kits should be separate from seeds and another sprinklers from hose fittings.

5.3.2 Classifying Members' Products

This classification was used as a basis to categorise all the products manufactured by G.I.M.A. member companies. Each member was asked to submit product brochures from which all brands were listed, each being followed by a short description of its differentiating characteristics. The list comprised about 1,500 different products (excluding differences in pack size or colour) which were grouped into product types (Table 36) and were cross-referenced by company. This was a difficult process since many companies raised objections about the classification of their products, some because they genuinely thought their product was different and some because they perceived a marketing advantage in having their products in a class of their own.

After around six months of debate a compromise, which suited all companies, was reached and this final classification was used to reference the 1983/4 product ranges of the G.I.M.A. members. The resulting document was called the G.I.M.A. Trade Directory (Plate 4). The Directory was distributed to all major buyers and British Embassies and was available to other interested parties for £100 per copy.

Table 36 : Index of Product Types

INDEX

BARBECUES
- Barbecues
- Charcoal
- Equipment
- Lighting Fuel

BUILDINGS
- Greenhouses
- Sheds
- Summerhouses/Chalets

BOOKS

CHEMICALS
- Animal Repellents
- Compost Makers
- Fumigants
- Fungicides
  - general
  - rose
  - vegetable
- Houseplant Chemicals
- Pesticides
  - ant killer
  - fruit/vegetable
  - general insecticide
  - rodenticide
  - rose
  - slug/snail
  - vaporisers
  - wasp killer
  - wormkiller
- Plant Growth Regulators
- Rooting Compounds
- Tree Wax/Grease/Compounds
- Weedkillers
  - lawn (including moss killer)
  - non-residual
  - residual

CLOCHES/COLDFRAMES
- Cloches
- Coldframes

CLOTHING/PERSONAL AIDS
- Clothing
- Personal Aids

CONTAINERS
- Biodegradeable Pots
- Bottle Gardens/Vases/Floral Containers
- Compost Containers
- Decorative Pots
- Fruit/Vegetable Tubs
- Incinerators

CONTAINERS (Continued)
- Plant Pots
- Propagators
  - electric
  - non-electric
- Seed Trays/Gravel Trays
- Self-watering Pots
- Window Boxes

FENCING/WALLING
- Fencing
- Lawn Edging/Chains
- Walling
- Wood Protectors

FERTILISERS
- General
  - solid; compound
  - solid; straight
  - liquid
  - soluble
  - spikes/tablets
- Houseplant
- Lawn
- Lawn and Weedkiller
- Manures
- Rose
- Tomato

FURNITURE
- Chairs
- Tables

GREENHOUSE ACCESSORIES
- Staging/Shelving
- Temperature Control
- Water Drainage

GROWING MEDIA
- Bulb Growing Media
- Compost
- Growing/Rooting Bags
- Hydroponics

HANGING BASKETS/BRACKETS
- (including pedestal baskets)
- Baskets/Holders
- Brackets/Accessories

LABELS

LEISURE
- Bird's Items
- Children's Items
- Lighting
- Masonry/Ornaments

NETTING
- Netting
- Other Plant Protectors

PONDS/POOLS
- Fountain/Waterfall Equipment
- Lighting
- Pools/Ponds
- Pumps

SEEDS/BULBS
- Bulbs
- Flower Seeds
- Grass Seeds
- Herb Seeds
- Kits - Bulb and Seed
- Sprouting Seeds
- Vegetable Seeds

SOIL CONDITIONERS
- Alginates
- Bark
- Clay Separators
- Horticultural Aggregate
- Peat
- Peat and Fertilisers
- Perlite and Vermiculite
- pH Changers
- Sand/Grit
- Trace Elements

SOIL TEST/PLANT CARE METERS

SPRAYERS
- Pump
- Trigger

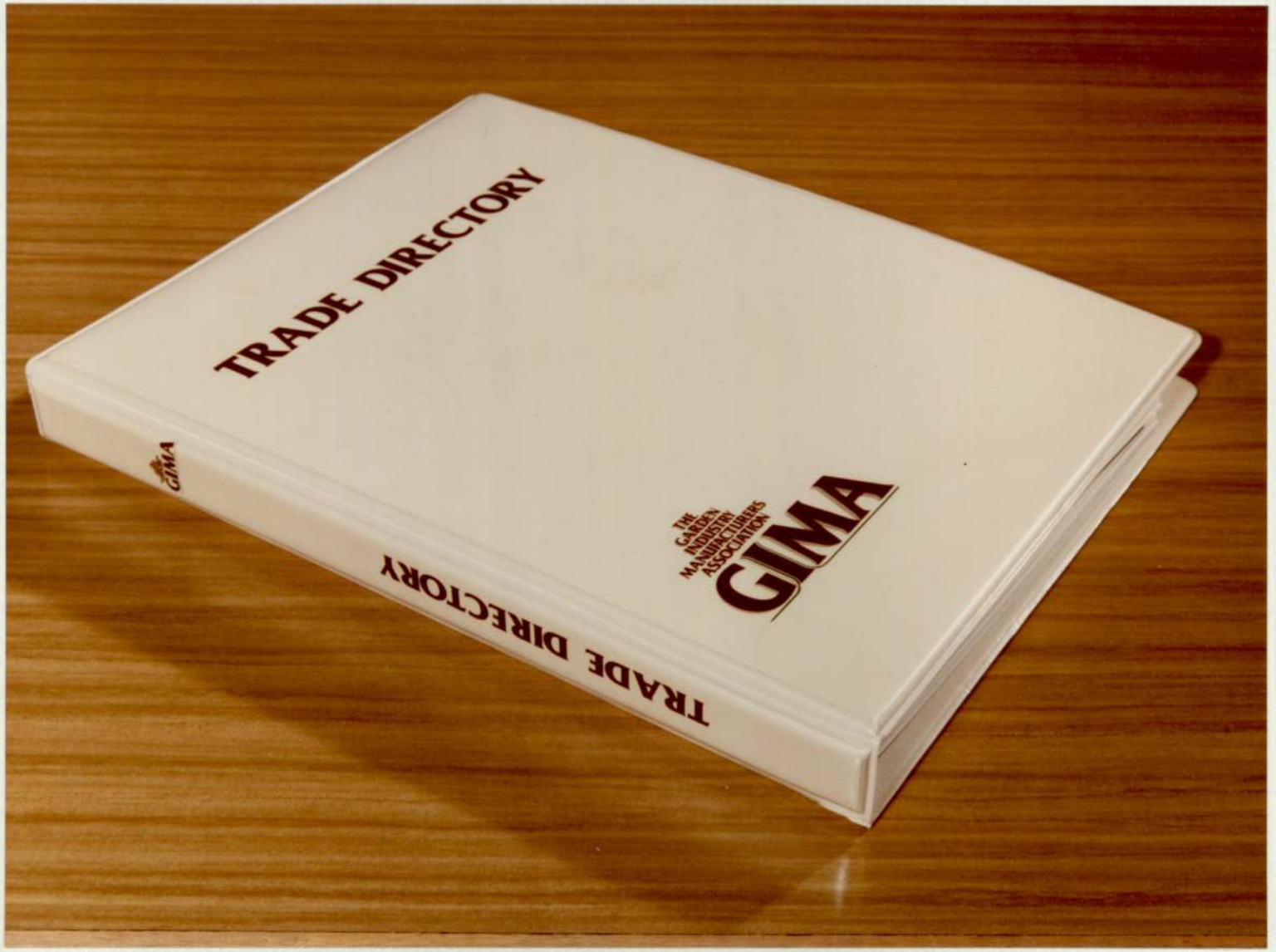
SUPPORTS
- Frames/Trellis
- Stakes
- Ties

TOOLS
- Cultivators - non-powered

TOOLS (Continued)
- Cultivating Tools
  - fork
  - hoe
  - lawn aerators
  - lawn edger
  - lawn spreader
  - spade
- Hand Tools
  - block-making device
  - brooms
  - bulb planter
  - cultivator
  - dibber
  - fork
  - hoe
  - leaf collector
  - sieve/riddle
  - transplanting tool (widger)
  - trowel
  - weeder
- Hedgetrimmer
- Lawnmowers
- Pruning Tools
  - knife
  - loppers
  - pruners
  - saw
  - secateurs
  - shears
  - sickle
  - wire cutters
- Rakes
- Rollers
- Tool Accessories
- Trimmers
- Wheelbarrows
  - wheelbarrows
  - accessories

WATERING AIDS
- Capillary Matting/Aggregate
- Dilutors
- Hose/Hose on Reels
- Hose Accessories
- Spray-Guns
- Sprinklers
- Water Butts
- Watering-Cans
- Water Carriers/Containers

Plate 4 : The G.I.M.A. Trade Directory



5.3.3 Summary

The importance of the G.I.M.A. Trade Directory lay not only in classifying garden products in a meaningful way, but also in presenting a product list of all members' products to major buyers in Great Britain and abroad. Again, the usefulness of the document was indicated by the decision to up-date its entries every year. Further evidence of its use also came from the fact that two market research agencies used it when undertaking market research in the Garden Industry.

5.4 STRATEGY FOUR: ATTEMPTS TO FIND ADDITIONAL FUNDING

When purchasing a product like market research the buyer is not only faced with a number of uncertainties about which product to buy and who to buy from but also whether the potential benefit of the buy will outweigh its cost (Chapter Two). We have already considered that the main benefit of buying research lies in decreasing the uncertainties surrounding marketing decisions, thereby, making them more profitable. Managers appear to measure the risk of undertaking research by weighing the likelihood of achieving this benefit against the cost of the research (Chapter Three). They may attempt to reduce this risk by maximising potential benefits or by minimising the costs. Strategies to maximise benefits include (a) seeking information about research to ensure a purchase matches the requirements and (b) identifying the information suppliers most likely to provide accurate and relevant research. These two strategies have been considered earlier in this Chapter. In terms of minimising costs, companies may co-operate with others to

share the cost of research or they may seek some sort of sponsorship.

Associations also have the option to co-operate with each other but as discussed in Chapter Four this was not feasible at that time. Strategy Four considers the possibility of G.I.M.A. finding a sponsor to share the costs of a research programme, and thereby reduce the risk of its undertaking.

5.4.1 Sponsorship

Unlike the search for relevant market research suppliers there was a comprehensive document listing grants available for all types of schemes (Walker and Allen 1982). Unfortunately, the only market research ventures which were eligible for financial support were those for companies in the depressed areas of the North, for example, Newcastle.

One of the case studies considered in Chapter Four noted the support of the Manpower Services Commission to a scheme run in conjunction with the Horticultural Trades Association. The terms under which the M.S.C. had become involved concerned the potential of market research to improve the profitability of Garden Centres so that they could take on more staff. Although there was potential for the same undertaking in manufacturing companies the M.S.C. declined sponsorship.

Another source of potential support was from the Marketing Boards and, in particular, the Central Council for Agricultural and Horticultural Co-operation which offered grants for co-operative ventures (Economists Advisory Group 1983). However, although "producers" were eligible for grants manufacturers were not.

5.4.2 Summary

At the time the potential sources for sponsorship were approached, manufacturers were unable to obtain grants for co-operative market research schemes. Although this strategy was unsuccessful, sponsorship can serve to decrease associations costs, thereby reducing their risk of undertaking a research programme.

5.5 CONCLUSIONS

The four strategies considered in this Chapter were implemented to improve G.I.M.A.'s ability to provide a research service. Implementation of the first three strategies provided a base for G.I.M.A. to consider research of maximum potential benefit to its members. The first served to diminish a number of uncertainties faced by the members and Council members about the benefits of G.I.M.A. undertaking a service. The second strategy overcame another concern of Council members, that of identifying potential research suppliers. The strategy led to the production of the "Who's Who" directory which not only facilitated G.I.M.A.'s selection of the most suitable agencies but also provided the members with a reference document for their own research activities. The third strategy considered an important limitation in defining members' research needs in terms of their product markets. As a result of this strategy the G.I.M.A. Trade Directory was published which provided a classification of garden products and itemised all members' products. These strategies attempted to maximise the potential benefits of research. The final strategy examined the potential to minimise its cost. Although the fourth strategy was

unsuccessful, further development of co-operative marketing ventures may encourage sponsorship in the future.

The strategies served to reduce the risk of G.I.M.A. undertaking a research programme and placed them in a position to consider a service which would satisfy their members' research needs (considered in Chapter Three). The primary need of the members was for market size data and the various methods to collect such data will be the subject of the next Chapter.

CHAPTER SIX

PROVIDING A CO-OPERATIVE MARKET RESEARCH SERVICE

This chapter considers the use of various market research methods capable of satisfying G.I.M.A. members' primary need (Chapter Three) for market size data. The provision of such information on a trend basis was not only required by half the respondents to the investigation but has also been recommended as an integral part of co-operative research schemes (e.g. Retornaz 1961). In order to fully satisfy the members' requirement for market sizes, the data also needed to be accurate, product relevant and of reasonable cost (Chapter Three).

From talking to the managers it was apparent that there was a trade-off between these factors. For example, some managers indicated that £500 to £1,000 was a reasonable cost for obtaining the size of their product markets to an equal or greater accuracy than data already available (Chapter Three). However, it was obvious that different research methods could provide market sizes at various levels of accuracy, relevance and cost and it was important to understand what levels of trade-off were acceptable to G.I.M.A. members. A model which could identify the trade-off between various product attributes did exist (Bradley 1982) but its application to G.I.M.A.'s situation would have required G.I.M.A. to purchase market sizes collected by different research methods. G.I.M.A. could not be pursuaded to sponsor a trade-off analysis but the author, by examining each of the relevant research methods, was able to recommend the most likely compromise. Each of these methods, which include secondary data

collection, interfirm comparisons and "market surveys" (Kapferer and Disch 1964), will be considered in terms of its potential to provide G.I.M.A. members with accurate low-cost data about their product markets.

6.1 SECONDARY DATA COLLECTION

Most writers on the subject of market research recommend a thorough examination of existing or secondary data before any new research is undertaken. Although the secondary sources in the Garden Industry are relatively sparse they are supplemented by some researchers' interpretations of market movements. This information which is derived from available data will be considered as secondary data since no primary research is involved.

Studies have shown (Chapter Three) that despite the perceived inadequacy of the secondary sources the data were still sought by G.I.M.A. managers. Every effort was, therefore, made to ensure that managers were fully aware of the research available to them (Annex One and Two). One of the problems of these data concerned their use of various product classifications which hindered data comparisons and the assessment of market trends (Section 4.4).

The G.I.M.A. Trade Directory had provided one classification of products which was acceptable to the G.I.M.A. membership (Table 35). The secondary data from sixteen sources were, therefore, re-classified (as far as possible) using this index so that market sizes from each source could be looked at by product. These comparative data were published in a document called "Market Sizes", the first limited edition of which was produced in

December 1983. High demand encouraged the publication of updated editions in February and September 1984 (Annex Three and Four). Initially, "Market Sizes" was distributed free to G.I.M.A. members only. However, because of requests from non-members and the trade, it was subsequently sold for £45 per copy.

Other secondary data proved useful in supplementing the figures reported in "Market Sizes" and due to requests for information from members two other documents were produced. The first was called the "Market Facts Sheet" which reported basic consumer statistics (Table 37).

Table 37: Market Facts Sheet

Home population (1982)	:	54,773,000 (Great Britain)	
Number of households (1983)	:	20,405,000 (Great Britain) 20,900,000 (United Kingdom)	
Ownership of garden or allotment	:	84.5-89% of households	
Percentage growing flowers	:	74%	
vegetables	:	38%	
fruit	:	33%	
Garden sizes	:	Up to 3,000 sq ft	67%
		3,000-10,000 sq ft	16%
		Over 10,000 sq ft	10%
		Unstated	7%
Responsibility for upkeep of garden	:	Mainly man	25%
		Mainly woman	17%
		Shared	23%
		Other	35%
Visited a Garden Centre last year	:	52%	
Bought anything in a Garden Centre last year	:	43%	

SOURCES: OPCS Monitor PP1 83/3
AGB Home Audit
NOP 1978
Schlackman 1979
Advertising Association 1984
MRGB 1979
CACI 1984

The second was the "Market File" (Plate 5) which contained cuttings and reports from over fifteen published sources, including trade journals, newspapers and "Gardening, Which?" The clippings contained in the file described product markets in terms of, for example, the products available, the competition, prices and developments in trading. Both documents were, again, free to G.I.M.A. members but they were not available to non-members.

Reports from managers about the use of these market documents were very favourable. The most direct value statements were volunteered by five managers who considered "Market Sizes" to be more valuable than G.I.M.A. Futures. The latter document cost the Association more than twenty times that of the former.

Although most managers thought that these documents were useful for reference, they failed to completely satisfy their needs for market sizes and trends. This was because the data often lacked product specificity and continuity and/or managers were uncertain about the accuracy of some sources (Section 4.4). It was necessary, therefore, for G.I.M.A. to collect some new data in order to meet members' information needs.

Plate 5 : The G.I.M.A. Market File

6.2 GARDEN CENTRE STATISTICS

One potential source of statistics was from retail outlets selling garden goods. A particularly promising sector were the Garden Centres, some of which were already involved in an information study with a management consultancy (Section 4.3). A possible extension of this study involved the breakdown of outlets' sales by product type. Although initially products were to be grouped together for simplicity of accounting, the consultant's aim was for each outlet to break down its sales by particular items. The development of this process was, unfortunately, only in its formative stages. However, it presented a potentially useful source of data for G.I.M.A. managers for the future.

6.3 INTERFIRM COMPARISONS

One inexpensive way of collecting data which could satisfy G.I.M.A. members' needs was by using an interfirm comparison. The study of Horticultural Associations confirmed Hyman's view (1970) that members are the most frequently used source of data by trade associations. Undoubtedly, the attraction of the interfirm comparison technique lies not only in its low cost of operation but also the simplicity of its undertaking. There are, however, circumstances which affect the accuracy of the data collected (Kapferer and Disch 1964). The relevance of these to the G.I.M.A. situation were shown by a pilot study which tested the use of the interfirm comparison technique. Before the study was undertaken some observations were made about the likely accuracy of interfirm data.

6.3.1 The Accuracy of Interfirm Comparisons

Three trade bodies had submitted interfirm comparison data in response to the survey of British trade associations (Section 4.1). It was possible to compare data from one of these associations (Association of Manufacturers of Domestic Electrical Appliances) to similar data collected by the Business Statistics Office (Table 38).

Table 38: A Comparison Between Government and Interfirm Comparison Data (1979)

PRODUCT	UNITS SOLD (Millions)	
	BUSINESS MONITOR PQ 368	AMDEA
Irons	2.07	2.1
Washing Machines	1.18	0.6
Vacuum Cleaners	1.78	1.75

The only major difference between the two data sets was for washing machines, which is perhaps because the Government counts machines passing through Great Britain and A.M.D.E.A. does not. A.M.D.E.A. staff estimated that their 1979 figures for washing machines were within 90% of the actual market size but that those for smaller appliances were only around 60%.

The accuracy, they said, depended on the number of members contributing sales statistics. If the staff were correct, the close agreement of the two sources on sales of a small appliance, like an iron, was perhaps surprising. The possibility that the Association staff had been influenced by the Government data proved, through enquiry, to be

unfounded. The most likely explanation was that both data sets were approximations to the market size; the Government only collecting data from firms employing more than one hundred staff and A.M.D.E.A. only collecting members statistics. It was also true that since most of A.M.D.E.A.'s members had workforces of over one hundred staff, the two data sources shared a number of common respondents. There can, therefore, be high agreement between interfirm comparison and Government data but both are only approximations of actual market size.

Data from two other associations, the British Agrochemicals Association and the Fertilisers Manufacturers Association, were 20% and 30% respectively lower than comparable Government data. Again staff noted that incomplete memberships affected the accuracy of the interfirm data. In all three cases the trend data from the associations and the Government were fairly similar and it is concluded that in industries where Government data exists associations would be well advised to use them rather than collect their own statistics. However, in markets like the Garden Industry, where Government data is inadequate (Section 4.4), the interfirm comparison is a potentially useful source of market trends. In addition, where memberships are almost complete the technique may also provide an inexpensive source of accurate market sizes.

To assess the performance of the interfirm comparison under the constraints of the G.I.M.A. membership, a pilot study was undertaken in August 1983.

6.3.2 The Pilot Study

Two factors, cost and management workload, determined the

number of product groups to be studied. Most G.I.M.A. companies manufactured a range of product types, thus, to minimise the number of managers receiving questionnaires for more than one product type, four different products were selected. It was hoped that this strategy would keep non-response to a minimum (by sharing the workload amongst the managers) and, thereby, facilitate a broad response at low cost.

As far as was possible the product types were chosen where existing statistics were available so that the study's results could be examined for their accuracy. The four products - hoses, decorative pots, composts and general fertilisers - involved thirty-four managers, only twelve of whom represented more than one product category. The number of participants in each group ranged from eight (for decorative pots) to seventeen (for compost).

The managers were asked, using similar terms of reference to those used by other horticultural associations (Section 4.2), to submit their sales figures. To make this data more immediately useful a general impression of the change in trade over the past year was also sought (Figure 10).

Figure 10: The Interfirm Comparison Form Used in the Pilot Study

CONFIDENTIAL

INTERFIRM COMPARISON

(1) What are your U.K. sales of .....
from August 1982 to August 1983 in value and volume.
£ ..... millions
*Number/volume .....*thousands/tonnes.

(2) Taking account of inflation, what percentage *increase/decrease is this on 1981/1982 performance.
*Increase/decrease .....

(3) The total of all the replies to question 1 will give an estimate of the market size. However, since only G.I.M.A. members are involved in this survey, the market size will be under-estimated. To calculate the extent of this under-estimation, please state your share of the market.....%.

*Delete as applicable

Most horticultural associations estimate market size by collecting only their members' statistics. However, market sizes would be more accurate if the contribution of non-members' sales, to the overall market size, could be assessed. In order to do this association staff need to know (a) which members have contributed data to an intefirm comparison and their sales and (b) the turnovers of both non-responding members and any non-members.

G.I.M.A. Council made two important decisions which influenced the process of estimating market size by an interfirm comparison. Firstly, they said that non-members would not be involved in any comparison, a statement contrary to their original thinking (Section 1.3). Since there were no accurate data concerning the turnovers of non-member firms, it was difficult to see how one could estimate total market size. Secondly, the Council thought it was essential to assure confidentiality of the pilot

study data by employing accountants to collect the statistics. It was not, therefore, possible to identify non-co-operative member companies, many of which were significant sellers in the marketplace.

In view of these decisions an attempt to gain some idea of the quality of the market size reported was essential. Managers were, therefore, asked to estimate their market share (Figure 10).

In view of the high costs of employing accountants for a pilot study it was decided to test the adequacy of the form (Figure 10) on a trial run. G.I.M.A. managers were asked in a letter (Exhibit 3) to consider the form and note any problems they might have in completing it.

THE FINDINGS

Fourteen of the thirty-four managers reported that they would not participate in an interfirm comparison. Over half said that it was either against company policy to disclose their sales data or that they thought the statistics collected by the technique would be inaccurate. Other reasons for not participating included an inability to collect the necessary statistics and concerns about confidentiality.

Most of the companies refusing to co-operate had large market shares or were active in researching their markets. Their managers were confident in their knowledge of market sizes and trends and were reluctant to lose any competitive advantage by helping others to understand them also.

THE GARDEN INDUSTRY MANUFACTURERS ASSOCIATION

GIMA

Exhibit 3 : Letter Accompanying Interfirm Comparison Form

Registered Office: 18 Westcote Road, Reading, Berks, RG3 2DE Tel: Reading (0734) 586575

17 August 1983

Dear Member,

You have indicated that you want market size data. One way of getting this information is by participating in an interfirm comparison.

Basically, you send your product sales data to an accountant (who assures you 100% confidentiality) and all participating companies receive an aggregated figure i.e. an estimate of the market's size. To get market trends - this is repeated at regular intervals.

To begin with, 4 product sectors have been chosen for a trial run:

(1) Composts
(2) Decorative Pots
(3) General Fertilisers
(4) Hoses and Hoses with reels

These are defined by the Trade Directory section enclosed. Before the accountant is brought in, it is essential to check that all managers are able to provide the necessary information.

Please, therefore, LOOK at the enclosed form and note any problems you might have completing it.

By participating in an interfirm comparison you would receive:

(a) total sales (from GIMA members),
(b) sales trends since last year, and
(c) the market share accounted for by GIMA members.

Any suggestions or additional questions would be welcome.

Please either send your comments right away to:

Miss P Courtney-Wildman
IHD Aston University,
Birmingham B4 7ET

Tel: 021 359 3611 Ex.4586

or, if not received by 25 August I will give you a ring.

I look forward to hearing from you,

Yours sincerely

Penrose Courtney-Wildman

ration No. 1664796, England Bankers: National Westminster Bank PLC, 13 Market Place, Reading, Berks. RG1 2EP VAT No.: 301 3468 02
Account No. 67533507

Some of the twenty managers who agreed to co-operate did so on the understanding that all major manufacturers in their product market also co-operated. This required the participation of all member companies and some non-members, a situation which, in view of Council's decisions, was clearly unlikely to arise. However, the exercise was still useful because a number of comments were made about the use of the interfirm comparison technique. For example, managers reported annual sales in sterling from September rather than August. Manufacturers of relatively standard-sized products (like pots) thought unit measurements were useful but, because chemicals and compost are sold in many sizes, sterling value was considered a better overall measure for comparisons. Concerning the question about market shares, many respondents were unable to report them, saying that their willingness to participate in an interfirm comparison was in order to gain this very information.

As well as these comments some managers were concerned about confidentiality. This centred not on a mistrust of the co-ordinator collecting the data but on the possibility that other G.I.M.A. managers could identify their company's data from the results. Most managers agreed that a minimum of four participants was necessary to prevent this from happening. In addition, it was agreed that co-operating companies should account for at least seventy-five per cent of a market's sales to ensure some accuracy in the data.

SUMMARY

Chapter Three concluded that G.I.M.A. members sought accurate market size data and potentially one way of

collecting such information was by an interfirm comparison. Under the particular circumstances of the G.I.M.A. membership (prevailing at the time of the study), an interfirm comparison could not be used to satisfy the members' information needs. The major reasons for this were incomplete memberships in many product markets and/or an unwillingness on the part of some G.I.M.A. members to participate.

The study was extended to include all the product groups listed in the G.I.M.A. Trade Directory, and again the same problems arose. It may be useful for G.I.M.A. to reconsider this technique in future years, however, in view of the Association's slow growth (Chapter One) it may be some time before the necessary criteria for an interfirm comparison could be met.

6.3.3 Other Uses of Members' Statistics

Although it was not possible to collect market size data from members, it was still possible to collect general trend data. In March every year each member company renews its subscription to G.I.M.A. by paying a sum proportional to its sterling sales of garden products. However, since managers do not submit their sales data, the Treasurer cannot check whether the appropriate subscription has been paid. This had become an increasingly unacceptable situation so the author proposed that each company should be obliged to submit their turnover figures as a pre-requisite to their acceptance as members.

An additional advantage to such a scheme was that the Treasurer would be able to annually total members' sales figures and, therefore, obtain a market trend. One

potential problem concerned new members since the addition of their sales would alter the data base. To overcome this, it was suggested that each new recruit would submit sales figures from the first year the data was collected, each yearly total being changed accordingly.

6.4 MARKET SURVEYS

Secondary data and interfirm comparison data could not satisfy the members' needs for information. G.I.M.A., therefore, needed to collect some new data by what Kapferer and Disch (1964) described as "Market Survey" methods. These encompass a variety of market research techniques including, surveys, consumer panels and retail audits. One decision, therefore, concerned which technique could best satisfy G.I.M.A. managers' needs. A second decision involved the best method of undertaking the research since G.I.M.A. could either: (a) commission a new survey for themselves, or (b) extend an existing survey service. A third option, could have been to buy existing survey research at a syndicated price, but this was not feasible because current market surveys did not cover a sufficient range of products.

The definition of 'best' depended on how cost-effective a method was at satisfying the members' needs. At one end of the scale, the retail audit provided accurate market size data but at a high cost. At the other end, the survey technique was of lower cost but was thought (by G.I.M.A. managers) to provide less accurate data. The consumer panel method offered some compromise in terms of both cost and accuracy. These three techniques were each considered for their suitability.

6.4.1 Retail Audits : High Cost, High Accuracy

The major cost associated with retail audits is the amount of time the 'auditors' spend in the retail outlets. This is determined by the number of items in a product market to be checked. One way of assessing exactly what would be involved in a co-operative audit was, therefore, to select one product group and study it in depth.

A previous survey (Appendix One) had shown chemicals to be the most promising group since more than half the responding chemical manufacturers had used retail audits in the past. Retail Audits Limited were already auditing a substantial list of chemicals and, therefore, the terms of a co-operative audit were discussed with them. The terms agreed were that:

(a) a minimum of four companies would be involved,

(b) four audits a year would be undertaken,

(c) the cost would be around £10,000 per annum, and

(d) the cost per member would not be less than £2,000.

Stage One of the Investigation had showed that £2,000 was a higher price than some members were willing to pay for market size data. However, both Stages Two and Three indicated that many managers placed a value on the additional distribution data collected by the retail audit technique (Table 22).

In January 1984 the terms of the audit were discussed with G.I.M.A.'s ten chemical manufacturers each of whom were invited to join the co-operative scheme. Two manufacturers were already receiving audit data from R.A.L. and both wanted to share their costs through co-operation. Six other companies were interested in the

data but four of them felt that their presence in the market was not sufficient (in either product range or turnover) to warrant the expenditure. The other two both wished to receive audit data but neither wanted four audits a year. The remaining two firms were not interested in the information provided by a retail audit. Although it was not, therefore, possible to meet the terms laid down by Retail Audits Limited, a number of useful points emerged from the study.

For example, it was possible to compare managers' reactions to the audit proposal to their previously reported information needs (Chapter Three). Table 39 indicates the strong similarities between the two measures, lending validity to the results of the questionnaires.

The fact that the two managers already using retail audits did not report a need for such data on their questionnaire returns, further implied that managers only reported information needs which could not be satisfied by their current research systems. The study confirmed the importance of the cost of information and showed that if managers were not interested in the additional data provided by a retail audit, the price was too high to pay for market size and trend data alone. There was no mention of the selection of retail outlets affecting the accuracy of audit data, however, these concerns (Stage One) may have contributed to the unfavourable reactions to the audit scheme.

Table 39: Managers' Reactions to the Proposed Retail Audit and Previous Questionnaires

COMPANY NUMBER	REACTION TO RETAIL AUDIT	MAIN REASON	PREVIOUS REACTIONS TO DISTRIBUTION DATA
1	No	High Cost	No response (no previous research undertaken)
2	Yes	Already involved	Distribution not ranked in top five needs
3	Yes (1 audit)	Low Cost	Distribution data ranked 5
4	Yes	Already involved	Distribution data not ranked in top five needs
5	No	High Cost	Breakdown of sales by outlet type ranked 4
6	Yes	Low Cost	Actual sales ranked 1; Stock held ranked 2
7	No	No interest in information	Distribution and availability of products ranked 5
8	No	High Cost	Sales data ranked 2; Distribution data ranked 3
9	No	High Cost	No response (no previous research undertaken)
10	No	No interest in information	Distribution data not ranked in top five needs

6.4.2 Consumer Diary Panels : Medium/High Cost and Accuracy

The use of consumer panels has certain advantages over retail based methodologies. These include,

(a) total outlet coverage,

(b) relative ease of Universe definition,

(c) reflection of exact time periods,

(d) recording of domestic purchases only,

(e) information on consumer demographics, and

(f) research costs are often lower.

However, despite these advantages fewer G.I.M.A. managers had experienced using panel data compared to retail audit data (Appendix One). This may have been because of dissatisfaction (Stage One) with the size of consumer panels (and, therefore, the perceived accuracy of the data) or the incomplete product coverage of the current panel systems coupled with the long lead time before trends could be established.

There were two research agencies offering similar services in terms of panel size (around 4,000 consumers) and products covered. Both companies monitored extensive lists of very different products. The addition of a further one hundred and thirty product-types manufactured by G.I.M.A. members may not have been desirable since there is evidence to suggest that as lists become longer and more complex consumers become less diligent at completing the diary (Sudman and Ferber 1980). The cost of adding the G.I.M.A. list of garden products was estimated by Attwood Statistics Limited to be in the region of £1,500 per member, a sum in excess of what some managers were willing to pay for market sizes and trends

(Chapter Three). However, a large number of secondary and tertiary needs could also be satisfied by consumer panel data (more so than in the case of retail audits).

In view of managers' comments about panel sizes, product lists and costs, it seemed likely that co-operation to receive consumer panel data could only be achieved if these problems were solved. G.I.M.A. managers would also require education in the use of the technique and in the benefits of receiving panel data.

6.4.3 Surveys: Moderate Cost, Moderate Accuracy

The survey technique has the advantage of being less expensive than retail audits or consumer panels. However, survey data are often considered less reliable because they depend on the accuracy of consumers' recall and are affected by sample variations (e.g. Incorporated Society of British Advertisers 1979)

In terms of the experience of G.I.M.A. managers the survey was the most frequently used method of primary data collection and had been used by a broad variety of managers (Appendix One). The advantages of low cost and management experience indicated that a consumer survey could provide an acceptable basis for a co-operative research proposal.

There are a number of methods of making consumer contact; by mailed questionnaire, telephone or in person, either on the street or at their home. Most consumer contact is made by market researchers on behalf of one particular manufacturer. However, since interviewers account for a large proportion of research costs, many companies prefer to share the same interviewer. This fourth type of survey (called an omnibus) is particularly useful to managers who

have only one or two questions to ask the consumers.

To assess the relative costs of these methods seven companies, each specialising in at least one of the four survey methods, were selected from an agency directory (Market Research Society 1984). Each company was asked to estimate the cost of undertaking the following proposal:

> "Ask 2,000 randomly selected main garden-product purchasers about their purchases of items on the enclosed product list over the last twelve months."

The G.I.M.A. Trade Directory Index (Table 36) was enclosed. Previous gardening surveys had used samples of 2,000 gardeners and had considered purchases in the twelve months immediately prior to the survey. It appeared that these values were not only acceptable to the market research companies which used them (Schlackman Research Organisation and N.O.P. Market Research Limited) but also the G.I.M.A. managers who purchased the resultant research (Stage One).

Table 40 shows the agencies' estimated costs for undertaking the proposed research, the least expensive method being the omnibus survey.

The mailed questionnaire, a method generally associated with low costs, was the most expensive. This was because the research agencies planned follow-up procedures to obtain a reasonable response rate. In particular, it was felt that the length of the product list would contribute to a poor return of self-administered questionnaires.

Table 40: Estimated Costs of Undertaking the Proposed Research

RESEARCH AGENCY	RESEARCH METHOD	COST(Excl. VAT)
Audience Selection	Telephone	£10,385
British Market Research Bureau	Omnibus	£ 4,500
Business Decisions	Mail	£15,000
Gallup Surveys	Omnibus	£ 3,380
Gordon Simmons	Interview	£ 8,500
National Opinion Polls	Omnibus	£ 6,000
Research Services	Mail and Telephone	£25,000 each

In-depth discussions were undertaken with Gallup Surveys, the company proposing the least expensive research. It was known from previous gardening surveys (N.O.P. 1983) that a random selection of consumers would contain approximately forty to fifty per cent of main garden-product purchasers. Thus, to achieve the same sample sizes as previous surveys that is, two thousand consumers, four thousand needed to be approached. This random sample of consumers would be asked whether they were the main garden-product purchaser. The two thousand or so buyers would then be shown a number of show-cards detailing products manufactured by G.I.M.A. members and asked which of them they had bought in the previous twelve months.

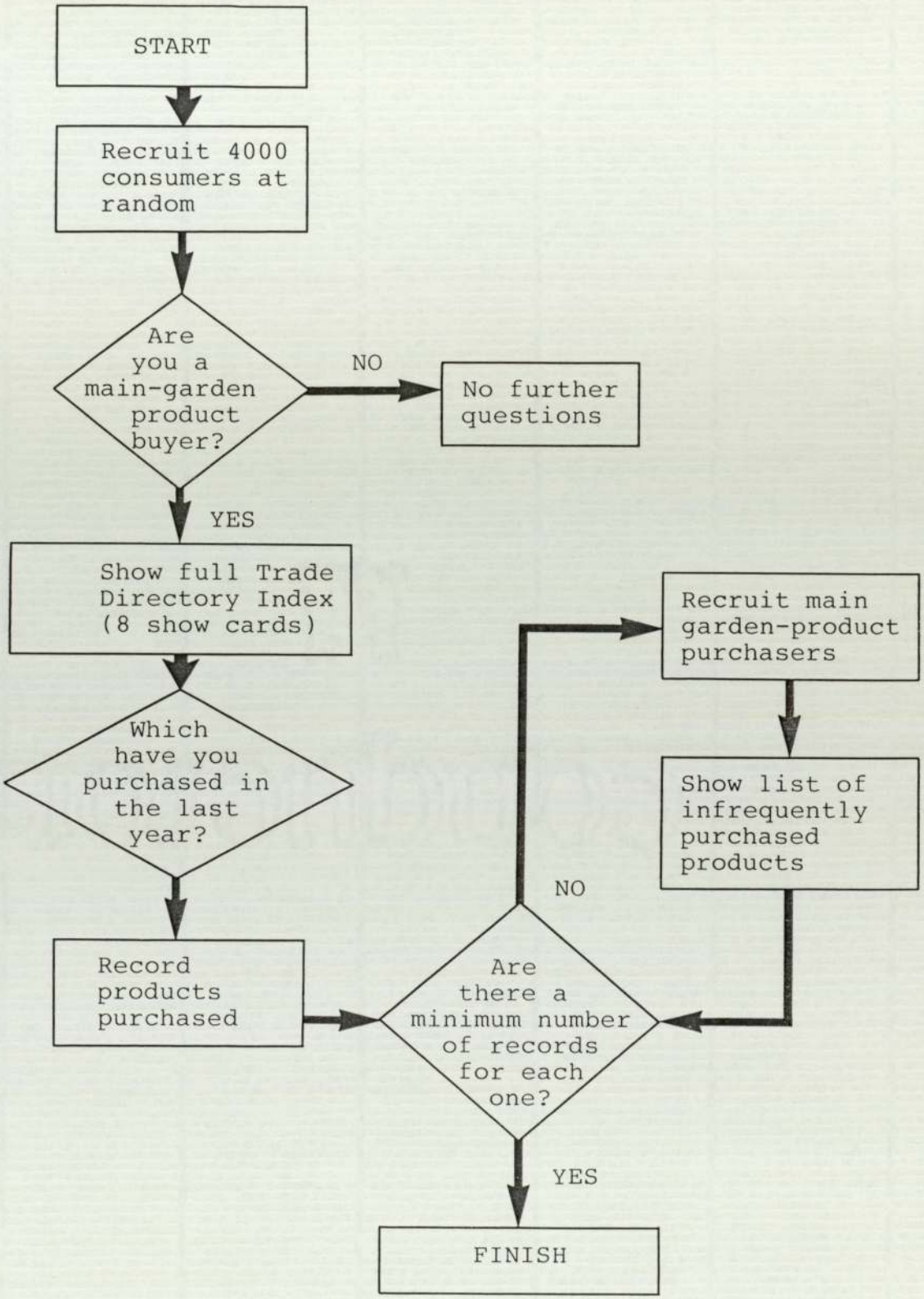
This could result in very few records of infrequently purchased items and, in particular, those bought only by certain types of consumer (Schlackman 1979). For example, a sample of two thousand purchasers might generate only

thirty records of flower gatherers or forty-four records of terrarium purchases (ibid). For such cases it would be possible (because of the flexibility of the omnibus technique) to begin the research process again the following week with a reduced number of products on the show-cards. A minimum number of purchases for each product could then be achieved enabling each manager to segment purchases by various demographics (collected as part of the omnibus procedure). It was proposed that the eight show-cards used would be taken from the G.I.M.A. Trade Directory Index (Table 36) and updated annually in line with the Index. Figure 11 describes this process.

The cost after the first stage was £3,380 (plus VAT) with additional, but smaller, costs arising from the second stage of the procedure. The total cost was likely to be less than £6,000 per annum.

It was apparent that by repeating this process every year it would be possible to collect market trends of product purchases. However, G.I.M.A. managers also required market sizes (Chapter Three) and these could be measured either in volume or value. There were two complications with collecting these data by the method described in Figure 11. Firstly, in any one year consumers may purchase more than one size of a particular product type, thus making volumes difficult to assess. Secondly, they may not be able to remember the price of products making the assessment of market values unreliable.

Figure 11: An Omnibus Procedure for Questioning Garden-Product Purchasers



In order to overcome these problems consumers would have to be asked to recall each purchase and be prompted (by line drawings or photographs) to remember its size. This would achieve market sizes in volume terms which either manufacturers could use directly or consumers could be asked to recall purchase prices. Gallup surveys had experience of using these recall methods and estimated that the cost of obtaining market sizes by volume would be around £250 per member per year.

In May 1984 a pilot study was undertaken to examine the overall feasibility of the survey described. The objective was to test the understandability of the show-cards and the ease with which consumers recalled garden-product purchases. The study, which involved forty consumers, showed that:

(a) certain terms used in the Trade Directory Index, for example, Hydroponics, were not understood,

(b) only forty-five per cent of the respondents could remember purchase prices (Schlackman 1979 had previously recorded an average of sixty per cent), and

(c) particularly purchases made the previous summer were difficult to recall.

In general, show-cards were considered a good way of presenting the list of products and terms which were difficult to understand were simplified. It was suggested that, since most garden products are bought in the summer, undertaking the survey in September would minimise the need to recall purchases made more than six months before. Since less than half the respondents could recall actual prices the photograph/drawing method was selected as the

best way to measure market sizes by measuring market volumes.

6.5 RECOMMENDATIONS TO G.I.M.A.

The arguments presented in this Chapter were initially put to the G.I.M.A. Council and later, at the Annual Seminar (November 1984) to the membership as a whole. Over seventy-five per cent of the member companies were represented at the seminar. The seminars, in which the recommendations for action were made, began by considering some important questions. These were:

(1) What is market research?

(2) What are the factors to consider in co-operative research?

(3) Do the potential co-operators have common information needs?, and

(4) If they do, what are the ways of collecting the information needed?

In answering these questions much of the work of the previous three years was brought together, including further education in market research, a summary of the findings concerning G.I.M.A. manager's information needs and the potential ways of satisfying these. In order to further interest the managers, the author also undertook some desk research to find out some market information about such markets as Soil Test Kits which had never been formally researched.

Against this background, the members were asked to consider a short-term package of proposals, the long-term possibilities and the question of finance.

6.5.1 Short-Term Proposals

In the short-term G.I.M.A. were recommended to fully exploit the existing data by continuing the "Market Sizes" booklet and the "Market File" (Section 6.1). This required the utilisation of either (a) Association staff, (b) member-company staff or (c) an outside agency. One external agency, Apcut Limited, costed the data collection necessary for the two documents at £132 for every hundred clippings, a clipping being defined as articles of two or more pages or an individual market size figure. Where a clipping could be used in both documents, or where two clippings reported almost identical information only the cost of one would be incurred.

As well as continuing "Market Sizes" and the "Market File" it was recommended that G.I.M.A. begin a "Trend Indicator" by collecting members' annual turnover figures. The first year of the indicator was to be in 1985 and members joining in subsequent years would be required to submit turnover figures from 1985 onwards. In this way the base data could be changed and the previous years' revised.

Another useful source of data were the retail outlets. However, since a method of collecting data from this source had not yet been developed, G.I.M.A. was recommended to set up a Council action-group to look at its feasibility.

The author argued that these proposals could not fully satisfy G.I.M.A. managers' information needs and, under the circumstances prevailing within the membership, the most effective way of doing so was by undertaking an omnibus survey as described in the previous section. In view of some members' need for an advice service the

company undertaking the omnibus survey agreed to meet the initial requirements for advice free of charge. After a period of assessing the likely level of demand any additional cost would be discussed with the Association.

6.5.2 Long-Term Proposals

Two or three years after implementing the short-term proposals, G.I.M.A. were recommended to assess whether the data provided were (a) useful and (b) sufficient. One possible scenario was that after the managers had experienced the benefits of the research data provided, they would be willing to pay a higher premium for it. In addition, G.I.M.A. having experienced the process of co-operative market research might see the benefits of expanding the service.

In the long-term, therefore, it was suggested that G.I.M.A. undertake a consumer panel. This would provide managers with a variety of data which would satisfy their primary information needs as well as many of their secondary and tertiary ones. The need to overcome the perceived inadequacies of the current consumer panels has already been discussed. In view of these problems, G.I.M.A. was recommended to set up a panel in conjunction with other leisure markets.

The construction of a consumer panel involves:

(a) the selection and maintenance of the responding consumer group,

(b) the processing of the data collected, and

(c) the presentation and interpretation of the results.

These processes require market research expertise and one suitable agency was, at that time, discussing a new panel

with hi-fi and video companies. With the foundations of a "leisure panel" taking place, it was feasible to suggest that G.I.M.A. use consumer panel data in the longer term. It was pointed out, however, that all methods of research contain some bias (for example Wind and Lerner 1979) and G.I.M.A. members may consider it valuable to continue the survey alongside the panel method.

6.5.3 Finance for the Proposals

The members at the Seminar restated their wish (Market Research Seminar 1982) that part of the cost of co-operative research should come from G.I.M.A. funds. In order to raise this money, G.I.M.A. had two options, either to raise subscriptions or to phase out an ongoing project. Obviously, one project which was coming to an end, was the University of Aston research, but the funds available from this were not sufficient to cover the short-term package of recommendations. A previous study of the benefits of another project, G.I.M.A. Futures (Section 4.3), showed managers wanted the data to be more product-relevant. The indication from the members that the recommended omnibus survey would provide more product-relevant data, identified G.I.M.A. Futures as a potential project to be terminated. Such action would release £6,000 a year to cover the cost of the package of short-term proposals.

The question of finance was openly discussed when the recommendations were put to the whole membership. To get an indication of members' willingness to contribute both financially and operationally to the proposals, the Council had devised a questionnaire which is shown with the results in Table 41.

Table 41 : G.I.M.A. Council's Market Research Questionnaire

SHORT-TERM		Would you be prepared to co-operate?	If so, would You Chair an Action Group?
A.	Market Size Booklet	78%	13%
B.	Trend Indicator	78%	13%
C.	Retail Data Action Group	61%	13%
D.	Survey (to supplement existing sources)	65%	9%

TOTAL SHORT TERM PACKAGE Are you prepared to pay estimated cost per company £200 per annum? **74%**

LONG-TERM: Own Consumer Panel			If so, would You Chair an Action Group?
A.	Selection and maintenance	43%	9%
B.	Data processing	30%	9%
C.	Presentation and interpretation	30%	9%
D.	Market research personnel	22%	9%

TOTAL LONG TERM PACKAGE Are you prepared to pay estimated cost per company £1,000 per annum? **22%**

Sixty-two per cent of the members present at the seminar returned the questionnaire, indicating their wish that G.I.M.A. undertake the package of short-term proposals. Three-quarters of the respondents were willing to commit at least £200 per annum in support of these services and over half of them were willing to commit much larger sums, many up to £1,000 a year. The promise of financial support

from the G.I.M.A. managers plus a contribution from G.I.M.A. funds (of around the same order as "G.I.M.A. Futures") would be sufficient to pay for the recommended services.

The fact that fewer respondents were willing to contribute to the long-term proposals may have been because members needed to experience the results of the short-term recommendations first. This implies that many of the respondents were inexperienced in using market research. Although it was not possible to examine respondents' previous research experience (because the company's names had been removed), comments on the questionnaire returns showed that the willingness to contribute to the long-term proposals depended on the perceived cost/benefit of the short-term package.

6.6 SUMMARY

This Chapter considered various market research methods potentially capable of satisfying G.I.M.A. members' needs for market size and trend data.

Low cost options were examined first, involving secondary data collection and interfirm comparisons. A number of useful documents were produced based on available statistics but, since their data often lacked product specificity and continuity, primary data collection was necessary. Interfirm comparisons can provide a useful source of trend data and under certain circumstances accurate market sizes. However, under the constraints of the G.I.M.A. membership it was only possible to recommend the implementation of a general market indicator.

Three other primary research methods were examined for

their suitability; retail audits, consumer panels and surveys. The retail audit was found to be too expensive and, whilst the consumer panel showed potential to satisfy members' needs, managers were concerned about the small sample sizes and excessive product coverage of existing panels. In addition, few managers had any experience of the technique and the costs (although lower than the audit) were above what many would pay for research.

The survey technique, therefore, offered the best opportunity to collect low cost data which managers and G.I.M.A. could afford thus allowing both parties to experience the benefits of co-operative market research. A proposal was presented to the membership and a subsequent questionnaire showed that the short-term package, including the survey, should be undertaken.

After two years of data collection the author recommended G.I.M.A. to assess the success of the proposals in satisfying managers' information needs. It would be at this stage that a decision to begin the longer-term proposals should be taken.

CHAPTER SEVEN

SUMMARY AND CONCLUSIONS

This final Chapter considers the practical and the theoretical implications of the work described in this thesis. It begins with a brief summary of the objectives of the study, the approach used to achieve them and the results of this approach. Some of the restrictions on the research undertaken are considered and a retrospective look taken at the research methodology. Practical advice is then offered to both trade associations and research sellers.

The research findings are then interpreted in terms of marketing theory and, in particular, current thinking about the purchase of market research information and co-operative market research in trade associations. The Chapter concludes with some observations regarding the direction of future research.

PART ONE

PRACTICAL CONSIDERATIONS

7.1 ACHIEVING THE PRACTICAL OBJECTIVES OF THE STUDY

The G.I.M.A. study set out to examine the feasibility of a particular trade association undertaking co-operative market research. An action-research approach provided a learning situation for the actors involved and an opportunity to implement change. The main objective of the research was to enable G.I.M.A. to offer information services which were of benefit to their members. It was, therefore, essential to understand members' requirements

for market research and G.I.M.A.'s constraints in satisfying them.

Various methods of investigating managers' information requirements showed a consistent and important need for market size and trend data, subject to considerations about its cost, relevance and accuracy. Managers indicated that G.I.M.A. needed to provide data which were (a) more accurate than were currently available, (b) relevant to all members' products and (c) cheaper than companies could purchase it individually.

G.I.M.A. comprises manufacturers of numerous product types and, therefore, relatively small savings on the cost of collecting data for individual products could be made. This situation perhaps made the concept of co-operative market research more difficult to sell than maybe would have been the case in an association representing only one product market. However, this was not the only constraint on G.I.M.A. providing useful market research services. In addition, the Industry had no product classification which could be used to provide members with relevant data. Secondly, there were few secondary sources diminishing G.I.M.A.'s chances of offering an inexpensive research service and contributing to the fact that a number of members had little or no research experience. Thirdly, both the staff and the elected G.I.M.A. Council lacked experience of finding out what research was needed and how it could be provided. Finally, the members had few opportunities to meet as a group, making a debate about their various needs more difficult to achieve.

The researcher, by undertaking certain tasks, offered G.I.M.A. members the opportunity to learn about market

research methods, the low cost research available and where more specific (and, therefore, more expensive) research and advice could be obtained. In order to facilitate this learning process, seminars were devised, reference documents were produced (Annexes 1-4) and managers could seek advice from the researcher about their market research needs.

At the end of the research programme G.I.M.A. were provided with a package of proposals about how they might develop market research services. In the short-term this would enable them to continue offering the research facilities set up by the researcher and to undertake inexpensive primary data collection to develop their members' research knowledge. In the longer-term G.I.M.A. were recommended to collect more detailed data which incurred a higher cost but was also of greater potential benefit to the members. Many managers indicated (Table 41) that the proposals could offer the research they wanted and they recommended Council to undertake the short-term package.

7.2 A RETROSPECTIVE LOOK AT THE RESEARCH METHODOLOGY

Before considering how the research approach might have been different it should be remembered that practical constraints were placed on the research process which influenced what could be achieved. The first and most important were the financial constraints because if money had been available, the author could have commissioned the collection of market sizes and trends. This would have given G.I.M.A. managers the opportunity to judge how closely their requirements were met by co-operative

research. In addition, because all managers would be assessing the same data, the researcher would have had the opportunity to more accurately assess managers' trade-off between the accuracy, relevance and cost of research. Providing these opportunities were particularly important because some of the G.I.M.A. managers had not used research data before and although their lack of provision was a constraint on assessing the benefits of the more expensive types of research, some real data were provided in the form of the G.I.M.A. Futures reports. Managers' assessment of their benefit lay in their use as reference documents but this did not, because of a lack of relevance, outweigh their cost.

Another constraint concerned two aspects of the Association's organisation, the infrequency with which the geographically fragmented membership and Council met and the annual change of the Council's President. The former aspect made it difficult to keep regular contact with the members and Council, often delaying decisions that needed to be made. The latter aspect caused changes in the Council's attitude toward the research, sometimes to the point of reversing decisions which had been made earlier.

A third constraint on the research process was imposed by the G.I.M.A. Council who wanted all managers involved in the development of the co-operative research scheme.

It was under these constraints that the first stage interviews were undertaken, the results of which indicated that companies of the same size and product group did not share the same views on market research. This was important since had it not been so, bases for sampling the managers could perhaps have been found and a quite

different approach taken to the research situation.

Taking all these factors into account it is suggested that the questionnaire method was the best approach and that no less than two questionnaires, addressing the whole membership, would have been required. The first would have been similar to that described in Appendix One, collecting information about each company's product, its size and structure, managers' past experiences of research and their future needs for it. However, one improvement over what was undertaken would be to consolidate the two questionnaires in Stage Two so that managers ranked their information needs at the same time. All these pieces of information would be important to interpret the results of the second questionnaire which would take the form of the modified delphi technique (Stage Three; Chapter Three).This technique would assess what information managers sought and the factors affecting their research purchases. The results of this process would be a complement of qualitative and quantitative data which would suggest the most appropriate techniques for co-operative market research.

7.3 PRACTICAL ADVICE FOR TRADE ASSOCIATIONS

As the structure of the association network becomes more fragmented (Chapter Four) associations may find it increasingly difficult to attract members unless they can offer differential benefits. Co-operative market research is one way that associations can provide tangible gains for their members which, because this is an under-developed aspect of co-operative marketing, can be discriminated from services offered by other associations.

Although some associations (for example, one-product types) may find it simpler to undertake market research than others, the G.I.M.A. study (because G.I.M.A.'s membership is so varied) shows that it is probably feasible for most associations to undertake co-operative research.

The first responsibility of associations is to understand their members' needs (and, if they substantially under-represent a market, those of non-members) for information. Whilst their staff are generally in a good positional situation to identify these needs two factors limit their ability to do so. The first concerns their inexperience of market research which may cause them either not to offer research services at all, or to provide services which are not wanted and consequently not used. The second arises from the infrequency with which most associations meet (Horticultural Trade Association Survey). Where members meet frequently association staff may, through discussion, be able to understand their information needs. However, where all the members do not meet very often staff require an effective way of assessing members requirements. The modified delphi technique described in Chapter Three can diminish both these limitations since it can identify all members' research needs and compare them with, for example, those of a small working group who have discussed their own requirements in-depth. In terms of gaining response from all members the G.I.M.A. study showed that, coupling questionnaire distribution with some other work and avoiding managers' busy times of year, were important.

The second responsibility of trade associations wishing to

undertake research services is to identify research methods which both collect the data required and take due account of the factors affecting information purchases. Cost is likely to be a primary factor and, therefore, associations are advised to search secondary research sources thoroughly to establish the potential of such sources to satisfy their members' information needs. Despite the fact that in the Horticultural Industry these sources could not fully satisfy G.I.M.A. members' needs, they were still useful as reference and provided a base for primary data collection.

If members' research needs involve productivity measures, interfirm comparisons can cost-effectively collect data but certain criteria may need to be met. In G.I.M.A.'s case the managers agreed that these should include a minimum of four participating companies which together accounted for more than seventy-five per cent of market sales. Although these criteria could not be satisfied in any product group it was still possible to track movements (by undertaking a more general interfirm comparison) in the total market - an opportunity which is available to any trade association.

Where interfirm data are not required or where the use of the technique is not possible it may be necessary to employ other primary research methods and this can be expensive. It then becomes more important, particularly to the non-research user, to show that the benefits of research in terms of its accuracy, relevance and the variety of data collected (Chapter Three) justify the high cost. Perhaps the best way to achieve this is to gain access to data collected by the recommended technique and

explain to the members the ways in which it can be used. As discussed in the next section this may require the co-operation of the research suppliers.

The final responsibility of associations considering market research services is to ensure that their members are involved in the decision about what research service is finally offered. This is important since the service may depend on the members for their financial support and the evidence suggests (Opinion Reseach Corporation 1972) that the greater their involvement the more likely is the commitment of members' funds. This, coupled with their other responsibilities, implies a fairly continuous cycle of assessment, feedback and, perhaps, education (depending on members' experience and knowledge) between members and association staff. As has been suggested, depending on the size of the association a combination of questionnaires, discussion groups and seminars (as occurred in the G.I.M.A. study) can be most effective in achieving this cycle. Having assessed their members' needs, association staff may find that either managers want different data or want the same data but for different markets. Under such circumstances associations may find it useful to co-operate with other associations in similar markets to jointly provide market research data. This was not, however, possible in G.I.M.A.'s case because the Council wished the provision of market research services to be a unique feature of the Association.

7.4 PRACTICAL ADVICE FOR RESEARCH SELLERS

Undoubtedly the first task of a research seller is to identify potential buying organisations and within them the key buying influences. Examination of both G.I.M.A. member and non-member companies (Appendix One and Chapter Four) showed that larger companies (and particularly multi-divisional ones) are more likely to buy research than smaller ones. However, research agencies who, because of this, concentrate their efforts on larger firms may find difficulties in identifying their key buying influences. This is because the buying centre of large firms is larger and more variable than those of small firms. One consistent participant of the buying centre is the research purchaser who acts as gatekeeper to important information and plays an active role in the purchase decision.

There are four ways that a research seller can influence buyers' decisions:

(a) by improving his reputation as a seller,

(b) by reinforcing buyers' needs for research data,

(c) by diminishing buyers' uncertainties surrounding the buying situation, and

(d) by communicating relevant and sufficient information about his products.

7.4.1 Improving Sellers' Reputation

Chapter Three showed that managers buy market research to improve the amount of profit made from their decision making and measure the likelihood of research achieving this benefit against its potential cost. The most important measures were the relevance of the data to the company's products and decisions, the accuracy and the

understandability of the data. Obviously, sellers known to provide information with such qualities are most likely to succeed and to gain this reputation research agencies would do better to concentrate on particular groups of manufacturers (for example, within one industry) rather than on certain research methods which is what happens currently. This is because reputation is passed by word-of-mouth and managers prefer research companies which they perceive, from previous work, to understand their industry.

7.4.2 Reinforcing Buyers' Needs for Data

One factor affecting purchases of information is a manager's perception of whether he requires it or not. Managers, and particularly those from smaller firms, may rely almost exclusively on salesmen's reports about changes in the marketplace. By their own admission (Chapter Three) such reports can be inadequate and inaccurate. Research sellers may, therefore, find it useful to reinforce managers' doubts about relying solely on salesmen as a source of information and, thereby, encourage the purchase of market research.

Undoubtedly, managers with little or no experience of research need education about research methods and the use of the data they collect. In particular, they need to appreciate the benefits of research and this can be done in two ways. Firstly, research sellers could offer data at a reduced price to encourage managers to experience the benefits of research directly or secondly, they could put together case studies of the research used by satisfied customers. Progress has been made on the latter point with, for example, A.C. Nielsen's 'Research in Action'

booklet which describes the experiences of industries related to the grocery trade. Whilst such efforts are relevant to those in the grocery industry to make any real impact on other tradesmen the experiences described must be extended so that they relate to the potential buyers' own industry.

7.4.3 Diminishing Buyers' Uncertainty

G.I.M.A. managers mentioned two important situational factors affecting their research purchases. These were the importance of the marketing decisions to be made and the degree of uncertainty they faced. Research sellers need to be much more aware of managers' level of certainty about facts relating to the decision for which research may or may not be bought. In order to convince managers that research is needed they must be able to question managers' preconceptions about a market. This can only be possible if researchers keep abreast of the market situation and only practical if they restrict themselves to one or two markets.

7.4.4 Providing Relevant Information

Managers are not only uncertain about the decision-making situation but also about what research (if any) they should buy and how much they should spend. Researchers need to be aware of such uncertainties and transmit relevant and sufficient data to negate them. As a first step market research agencies need to market themselves better to make sure that their customers are aware of their services and, in particular, their fields of experience. To target their marketing effort researchers need to understand their user segments and transmit reassuring information to diminish managers'

uncertainties, especially those concerning their choice of supplier.

In summary, research sellers need to communicate more effectively with managers and, thereby, undertake more aggressive marketing of the products they sell. Having gained their confidence researchers will be better able to understand the uncertainties managers face and to provide them with the research they need. Because communication costs money it was suggested earlier that researchers target their marketing to specific groups of companies. Trade associations offer great potential here particularly if research agencies are willing to help the staff to define what research is needed and to co-ordinate activities. The initial cost of participating in such ventures may be higher than selling market research to existing buyers but the potential pay-offs are substantial. In addition, as an under-utilised source of business, a research agency investing in co-operative research would be etching its own marketing niche.

PART TWO

THEORETICAL CONSIDERATIONS

The findings of this thesis impact on two main areas of theory; organisational buyer behaviour and co-operative market research in trade associations.

7.5 ORGANISATIONAL BUYER BEHAVIOUR

7.5.1 The Purchase of Industrial Products

It was suggested in Chapter Two that the purchase of market research could be considered within an organisational buyer behaviour framework. The G.I.M.A. study found evidence to support this and, in particular, some of the main features of industrial buying. For example, the rational and non-rational uses of research, identified in the preliminary interviews with G.I.M.A. managers, were the same as the economic (task) and psychological (non-task) variables propounded by Webster and Wind (1972a). Also, Sheth's suggestion (1973) that product, company and situation-related factors were important in influencing industrial buying behaviour was borne out by the G.I.M.A. research.

Concerning this last influence - the buying situation - evidence of three of Cardozo's (1980) dimensions were found. The fourth - the importance of the product type - was only substantiated to the extent that co-operative research, as a non-standard product, requires slightly more marketing effort than individually commissioned market research because of the need for compromise. Of particular note were the similarities between the types of uncertainties surrounding the purchase of products for an

organisation. G.I.M.A. managers and staff were anxious about all five types of uncertainty suggested by Cardozo (ibid) from product definition to transaction details. As with the sale of industrial products (Chapter Two), vendors of research can increase the likelihood of selling their products by trying to diminish these concerns.

One primary difference between industrial products and market research is the recognition of their need. The requirement for an industrial product is often driven by a specific job of work and, although this can be true of market research it generally has a number of uses some of which may not become clear for some time. This is particularly true of trend data since its main benefit comes long after its initial undertaking. This difficulty in pinpointing the specific use of market research may make it more difficult to sell than industrial products.

7.5.2 The Purchase of Market Research Information

One significant achievement of the G.I.M.A. research was the collection of data about small firms and the differences between their buying behaviour and those of large companies. For example, in the large multi-divisional companies the buyer (who could authorise research expenditures) formed part of a buying centre which was both larger and more variable in its constituents than those of small independently-owned companies. In the latter case, the buyer (often the head of the business) was usually the only member of the buying centre.

The differences between the two types of company reflected two decision-making processes and, perhaps because of this, two approaches to the purchase of market research

information. Managers in the large multi-divisional companies tended to take decisions by committee and often used market research to reconcile differences between decision makers. In addition, their experiences of market research were broad and their attitudes towards purchasing it were, generally, favourable. The heads of small, independent businesses, however, who displayed more autocratic decision-making processes, purchased market research less often and their experience of it was correspondingly low. Many, therefore, lacked knowledge about the benefits of research and were less inclined to purchase it.

One particularly important point concerned the source of revenue for market research expenditures. The large multi-divisional companies generally had set procedures for undertaking research and budgets were, on the whole, allocated on an annual basis. However, in the small independent companies not only were there no research budgets but, since many business heads were also shareholders, expenditures were viewed as coming from their own pocket.

Despite these differences companies of all sizes, structure and product lines consistently asked for the same data - market sizes and trends. Although this may simply reflect the inadequacies of this type of data in the Garden Industry, it is suggested that similar findings would result from studies of other industries because basic market data provides a common base for all companies to do their own specialised research.

The second significant achievement of the G.I.M.A. study was to provide association staff with methods of assessing

their members' needs for information. It has already been suggested that one of the most important limitations of trade associations in undertaking co-operative market research is the experience of their staff. The questionnaires used in the study outline the most important questions that need to be asked, namely what are managers' individual experiences of research, what information does each want and what factors affect their purchases of research. In particular, the modified delphi technique offers a new way of gaining managers' attention and enables association staff to compare subjective data (for example, the opinions of a working committee) with managers' requirements. This, by means of the ranking process, provides the information to achieve the compromise necessary for co-operation.

Another aspect of the results of the G.I.M.A. study is their impact on the theory of research buying. It is known that organisatonal buyer behaviour involves a complex interaction between the buyer or buying centre and a number of factors which emanate from both inside and outside the company. Figure 8 showed which factors G.I.M.A. managers thought were the most important and many of their inter-relationships. Some factors were defined more explicity than previously in the literature. For example, research relevance applies not only to products but also to company planning, activities and objectives. Relevant data also requires the research to be timely which, at least for some managers, means fairly continuous data collection. Other factors were defined in a different manner than previously. For example, understandability was not determined by the quantifiability, consistency or

comparability of the research (Snavely 1967). One of its determinants - simplicity - was important particularly to managers of small companies who lacked the time to analyse data and the knowledge of how to do so. Previous research knowledge was important not only because managers with experience could use the research more readily but also because favourable experiences were coupled with a greater receptivity for the research content.

Two other research factors considered in the literature, significance (Bellenger 1979) and sufficiency (Blyth 1978), were only mentioned indirectly by G.I.M.A. managers. Research which met the criteria of accuracy, relevance and understandability was expected to be significant. In addition, if such research was being sold at the right price for the decision to be made, it was thought sufficient and therefore of value. As had been suggested in the literature this sort of subjective analysis of research worth was the only type of evaluation undertaken by managers.

The model (Figure 8) is significant not only because it attempts to explain the origin and interaction of the various influences on managers' purchases of market research but also because it is the first attempt to rank their importance. Cost, for example, was identified as much more important than market researchers had previously thought (Lehmann and O'Shaugnessy 1974) and was weighed against three important parameters of research namely its accuracy, relevance and understandability. Although much more research could be done to understand the relationship between these and other influences, the model does explain the basic motivations behind research purchases.

The G.I.M.A. study not only has a major impact on the theory of buying behaviour but also on the feasibility of co-operative market research in trade associatons.

7.6 THE FEASIBILITY OF CO-OPERATIVE MARKET RESEARCH

Chapter Two suggested that the lack of co-operative marketing activity between British firms was partly due to their ignorance of the benefits of co-operation. Although there was evidence that G.I.M.A. managers lacked an awareness of these benifits, a potentially more important phenomenon was their lack of knowledge about how to establish co-operative marketing services. Staff of trade associations are undoubtedly in a good position to initiate and co-ordinate co-operative activities, but they may lack the experience to define those services which will be of maximum benefit within the constraints of their restricted resources. Evidence (Horticultural Trade Association Survey) suggests that the structure of the association network is becoming increasingly fragmented, diminishing resources still further and, by virtue of a greater choice of associations to join, increasing the need for associations to offer competitive services. Effective competition can be achieved by not only offering services which both members and non-members want but also ones which are not provided by other associations.

The G.I.M.A. survey showed that both members (Chapter Three) and non-members (Chapter Four) wanted market research services and that the few associations in the Industry offering such services provided fairly elementary data about specific markets (H.T.A. Survey). Since so many companies manufactured products in more than one

market the provision of more broad ranging research was also needed.

Having recognised that market research services could provide members with tangible benefits, association staff need to assess managers' information requirements to see if a common need can be satisfied. This may be a problem since the indications (H.T.A. Survey) are that staff may lack the knowledge necessary to do this. As previously discussed (Section 7.3) the research methods developed in the G.I.M.A. study can help staff achieve this understanding. Apart from their difficulty in assessing members needs, Chapter Two suggested that association staff may face three other problems. These are inter-company competition, members' needs for advice and the funding of co-operative services.

7.6.1 Inter-Firm Competition

The only mention of inter-company competition concerned the use of the interfirm comparison technique since some managers felt that by submitting data they would loose their competitive advantage. Perhaps by virtue of the fact that all companies needs were taken into account, thereby maintaining an edge over non-members, inter-member competition was not seen as very important in the G.I.M.A. study.

In Chapter Two it was suggested that the provision of basic data would minimise inter-firm jealousy (Johnson 1973) and it would be acceptable to all types of management sophistication (Cox and Good 1967). It could then be used by individual companies as a base to collect more specific data (Kapferer and Disch 1964) and would be particularly useful if it were collected on a trend basis

(Retornaz 1961). It may, therefore, simply have been fortuitous that almost all members, irrespective of their research sophistication, wanted basic market data or, as has been suggested earlier, their common need may have reflected the inadequacies of the research data available in the Garden Industry.

7.6.2 Advice

The importance of advice in the G.I.M.A. study was paramount because almost one quarter of the managers had no experience of market research. Educating and advising members is one of the more difficult responsibilities of associations undertaking co-operative research (Willsmore 1950) probably because members differ in their needs for help. The suggestion (Kapferer and Disch 1964) that sending explanatory documents out with research data would aid the situation may not be very useful, unless managers have reached a common level of understanding. A potentially better approach was recommended by the G.I.M.A. managers who suggested (Section 5.1) that advice should be available to all companies as and when they needed it. Although managers were not particular about which market researcher gave the advice it was suggested (Chapter Six) that, in order to preserve associations' principles of neutrality, an independent body should undertake this role.

Associations have a number of options concerning market research training. Firstly, they could employ a consultant to give individual advice to each member. Secondly, they could run research seminars or workshops in conjunction with either market researchers and/or experienced research users in their own or other industries. Finally, they

could send out monthly newsletters with examples of how market data had been usefully used by various companies. Which option or combination of options is used will depend on members' needs for advisory services.

As well as co-ordinating the advisory aspect of a research service, associations also need to keep members informed and involved in the planning of a research scheme. Kapferer and Disch's suggestions (1964) to promote co-operative market research and educate members about the benefits of market data proved to be very useful in the G.I.M.A. study. By keeping members informed about the planning of services, associations can increase the likelihood of their utilisation and create favourable attitudes towards the association. These are important factors in securing funding from their membership (Opinion Research Corporation 1972).

7.6.3 Funding

Various methods of paying for co-operative market research services have been suggested (Chapter Two). The G.I.M.A. managers favoured part payment by an equal subscription from each member and part payment by their Association if the information received by each member was the same. If, however, individuals sought additional information or analysis or advice was required they should incur the additional cost.

The few horticultural trade associations that undertook any market research paid for it out of the general budget rather than asking members for financial support. This may be because association staff cannot depend on members' funds when the members have not been consulted about the undertaking of a service. In addition, Johnson (1973)

suggested that members' willingness to commit funds depends on the relevance of the data collected. It is difficult to conceive that information will be highly relevant if managers have not been consulted about their needs.

These problems of inter-firm competition, advice and funding have been previously mentioned (albeit briefly) in the literature. However, there are other factors of which associations need to be aware. These include the breadth of their members' product coverage and the completeness of their representation in each product market. These factors define the number of industries that may need to be researched and the number of members within each market who will support the research programme. In the G.I.M.A. study these factors were critical because they dictated that certain research methods, like the interfirm comparison, could not be used and that expensive techniques may not (even if managers had greater research experience) have been desirable.

7.7 FUTURE RESEARCH

A number of directions for future research can be recommended. The first could look at the stage following the study of the feasibility of co-operative market research by monitoring the implementation of a research programme and its development over time. Such research would need to consider changes in managers' needs for information as they become more sophisticated and the necessary changes in the programme to account for them. In addition, the development of a scheme would have implications for the association itself, and its

developing role in the provision of research services would be an interesting topic for study.

Another direction could involve associations' general assessment of which services they should offer and how each should be marketed. As the number of associations grow it may be that they have to co-operate more with each other in order to satisfy sufficient members to justify their existence. Indeed, the whole future of representative bodies, their structure and interaction could form a third avenue of study.

In describing the G.I.M.A. case study, market research was considered as an organisational purchase. The similarites and differences between the purchase of industrial products and market research could justify a fourth line of investigation.

A further theme of the study was the importance of factors affecting research purchases. Of interest would be whether the same factors apply to other companies and how the factors interact to affect purchases of market research. This might not only help associations understand the needs of their members but may indicate more clearly to market researchers which factors are likely to be most influential in the marketing of their products.

Finally, one of the most interesting aspects of the G.I.M.A. study was the relationship between market researchers and association staff. Further research into the role of each party in co-operative research ventures could encourage more schemes to be set up. A particularly important area is likely to be the education of members since associations may be reluctant to accept responsibility for research training (Fournis 1961). Only

by encouraging co-operation between market research companies and trade associations will both parties be able to see the potential benifits of co-operation.

APPENDIX ONE

STAGE TWO: THE SELF-ADMINISTERED QUESTIONNAIRE

PART ONE - September 1982

A.1.1 INTRODUCTION

To identify the full diversity of the G.I.M.A. members, some basic information (based on parameters found in the Stage One interviews) was sought. The most efficient method of collecting this data was by a self-administered questionnaire (Table 8) which was handed to the relevant personnel at the September 1982 Trade Show. The potential respondents were identified as those managers who could authorise research expenditures (Stage One). The nature and importance of the research was explained during the distribution process and reinforced in an accompanying letter. Assurances of confidentiality were also given.

A.1.2 METHOD

The questionnaire covered three topics, company information, past research experience and future research wants (Exhibit A1).

A.1.2.1 Company Information

Company-related factors thought to influence research purchases (Stage One) included size, structure and products manufactured. Size was measured in annual sterling turnover (Question 7) and products by a more detailed classification than previously used (Question 10). Structure was measured as before by the definition of marketing roles and inter-relations with other firms. These were established respectively from personal interview and Who Owns Whom (1982).

Exhibit A1 : Membership Questionnaire and Results

Market Research, in this context, includes all means by which your company gains information about the Garden Industry, including research done by a Market Research agency, by executives within your company and all desk research, excluding information gained from internal company sources (e.g. sales-force reports, company records etc.) and that derived from scanning journals.

(1) Has your company, in the last 5 years, received or undertaken any Market Research? (please tick)

YES **45** NO **12**

(2a) Was the Market Research received:-

On a planned and fairly continuous basis	15
OR On an erratic and irregular basis	30
Once a month	8
OR Once a year	12
OR Less frequently than annually	25

(2b) What type of Market Research data have you received? (you may tick more than one)

Government data only	12
Published data not primarily concerned with gardening	11
Published data primarily concerned with gardening	25
Research commissioned for your company only	24
Research commissioned for a syndicate of companies	7
Research done by a Market Research firm, which was not commissioned and was available to any interested party	23
Other (Please state)	2

(2c) What methods were used to collect this data? (you may tick more than one)

Consumer diary panel	6
Panel of Retailers	7
Retail Audit	16
Distribution check	17
Consumer attitude survey	21
Group discussions with consumers	14
Test Market	12
Desk Research	28
Other (please state)	4

(2) Why have you not received or undertaken any Market Research? (you may tick more than one)

Too expensive	8
Your company does not need Market data	1
Lack of personnel	9
Data which is presently available is not relevant to your company's products	2
Data which is presently available is not accurate and/or reliable	0
Other (please state)	

PLEASE TURN OVER TO TABLE A

Table A lists some of the information that can be derived from Market Research data.

(3) Using Table A, please tick the information that you have received in the PAST and that which you may need in the FUTURE, even if you have not received any to date (you may tick more than one).

TABLE A	RESEARCH USERS n=45		NON-USERS n=12	TOTAL
	PAST	FUTURE	FUTURE	FUTURE
MARKET SIZE				
The value of the market sectors in which you are competing	30	38	9	47
The value of the market sectors in which you may wish to enter	19	30	11	41
PRODUCTS				
Attitudes towards existing products/pricing/promotions etc.	20	28	8	36
Attitudes towards new products	19	34	8	42
The competitive characteristics of your products	18	25	6	31
Information concerning your competitors products	21	30	7	37
CUSTOMERS				
The characteristics of the consumers who buy/do not buy your products	16	25	7	32
Information concerning the frequency of purchase/usage	17	26	6	32
MARKETING				
Information concerning the distribution of your products	25	31	8	39
Attitudes towards new and/or existing advertisements	12	21	7	28
Opinions of the Trade towards products/advertising etc.	17	32	5	37
Others (please state)	1	1	0	1

(4) If you have NOT placed ANY ticks in the future column, can you forsee any circumstances when your company will need Market Research data? (If Yes, please state these circumstances) YES 0 NO 1

(5) With respect to the information you may need in the FUTURE, will you want information by:-

Product Group	17	Country	15	Consumer Type	17
Brand	2	Region	7	Garden Type	3
Both	38	Both	35	Both	37

(6) Most Market Research data will tell you the age, sex, social class and home region of the consumer. In addition to these characteristics, which of the following do you consider to be essential pieces of Market Research data (you may tick more than one).

Size of family, its composition and age groups	15	Occupations of adults in the family	12
Ownership of certain household products	12	Household amenities	9
Ownership of garden products	42	Ownership of houseplants	31

Ownership of a garden/balcony/conservatory/window box/patio/allotment/greenhouse	45
Number of hours spent in the garden and chores done according to the family member doing them	22
Size of the garden and/or allotment	24
% of garden used for flowers, vegetables, lawn, play area etc.	27
Whether plants are grown from seed	21
Others (please state)	7

(7) What is your turnover from the sale of Garden Products?

Less than £500,000 per annum	15
Between £500,000 and £1 million	14
Greater than £1 million	28

(8) On average how much do you spend on Market Research a year? (See Graph A1)

(9) Do you have a budget put aside

(a) especially for Market Research	11
(b) for Market Research plus another outgoing	10
(c) no Market Research budget	36

(10) Which of the following market sectors are relevant to your company's product range. A more detailed classification can be found overleaf (please tick)

Chemicals	18	Tools	11	Decorative items	12
Growing media	21	Supports/Netting/Fencing	6	Furniture	4
Growing media improvers	16	Buildings and Structures	3	Leisure Products	9
Containers	19	Greenhouse accessories	11	Plant Material	11
Watering aids and sprayers	20	Personal equipment	3	Information	6

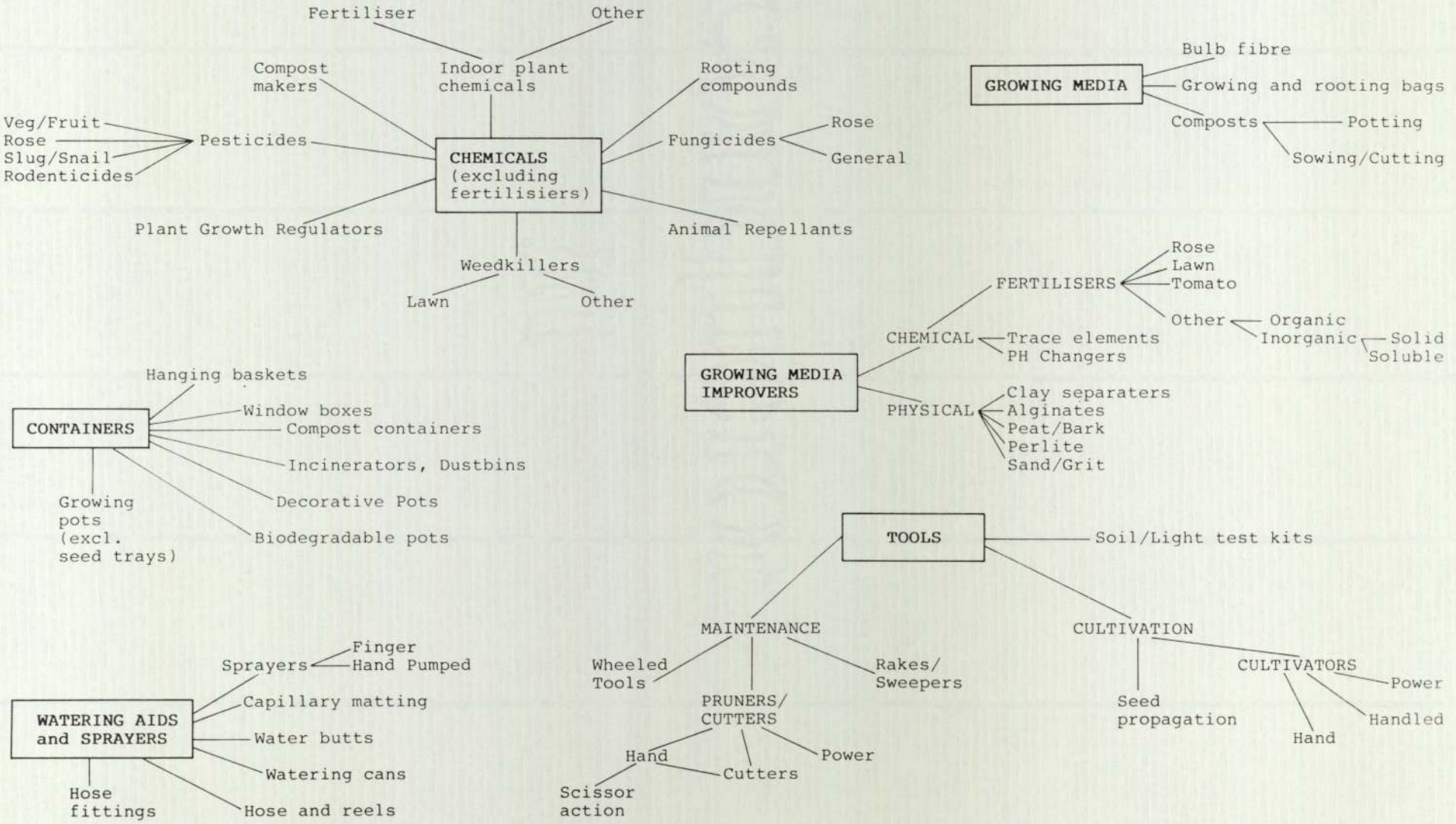
All comments are welcome.

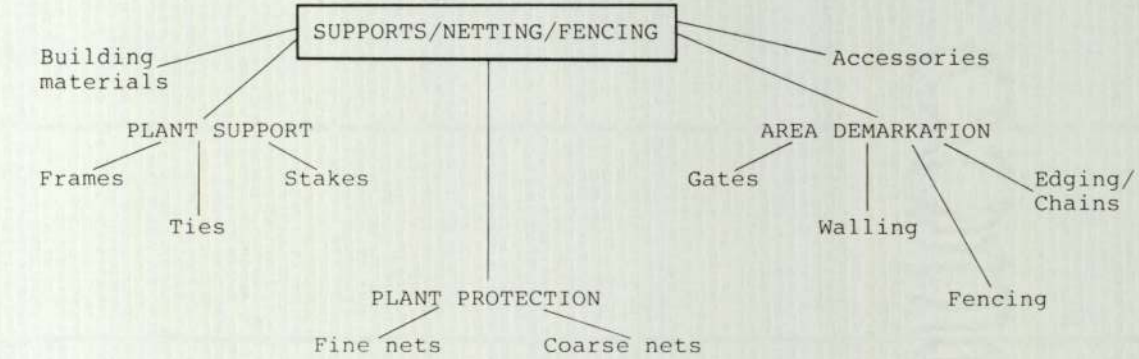
Thank you for your co-operation.

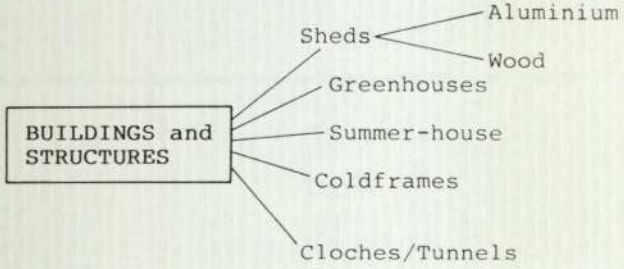
COMPANY NAME:.....

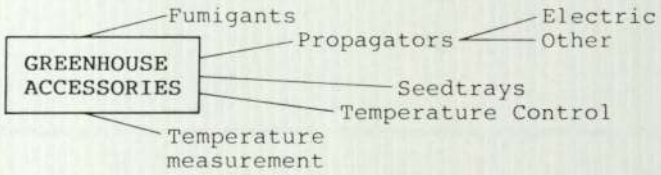
SIGNATURE: .....

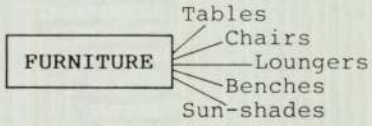
Classification of Garden Products



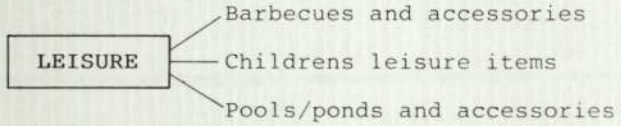


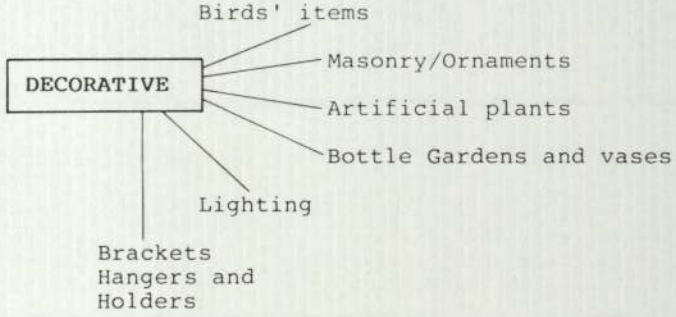


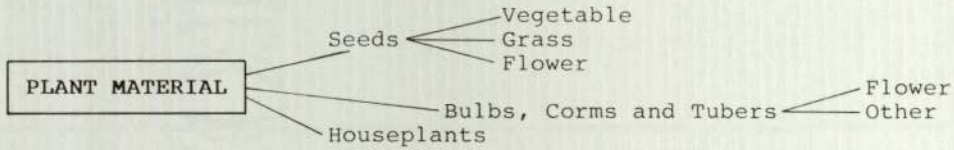


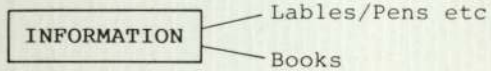


PERSONAL EQUIPMENT









A.1.2.2 Past Research Experience

A further factor thought to affect research purchases was managers' past experiences of research. This was measured by a number of dimensions including:

(a) the frequency of research undertakings (Questions 1 and 2a),

(b) the source, method and type of information taken (Questions 2b, 2c and 3),and

(c) the research budget (Questions 8 and 9).

A.1.2.3 Future Research Wants

Finally, respondents were asked to consider their future wants for certain research types which were detailed on a list (Question 3). The list was compiled from the results of Stage One and a survey of companies' common research activities (Twedt 1978). Indications of the level of detail sought by managers was also collected (Questions 4, 5 and 6).

The questionnaire was piloted on Council members whose main criticism concerned it length. By improving the layout, the length of the questionnaire was considerably shortened. The final questionnaire and the results collected are shown together in Exhibit A1.

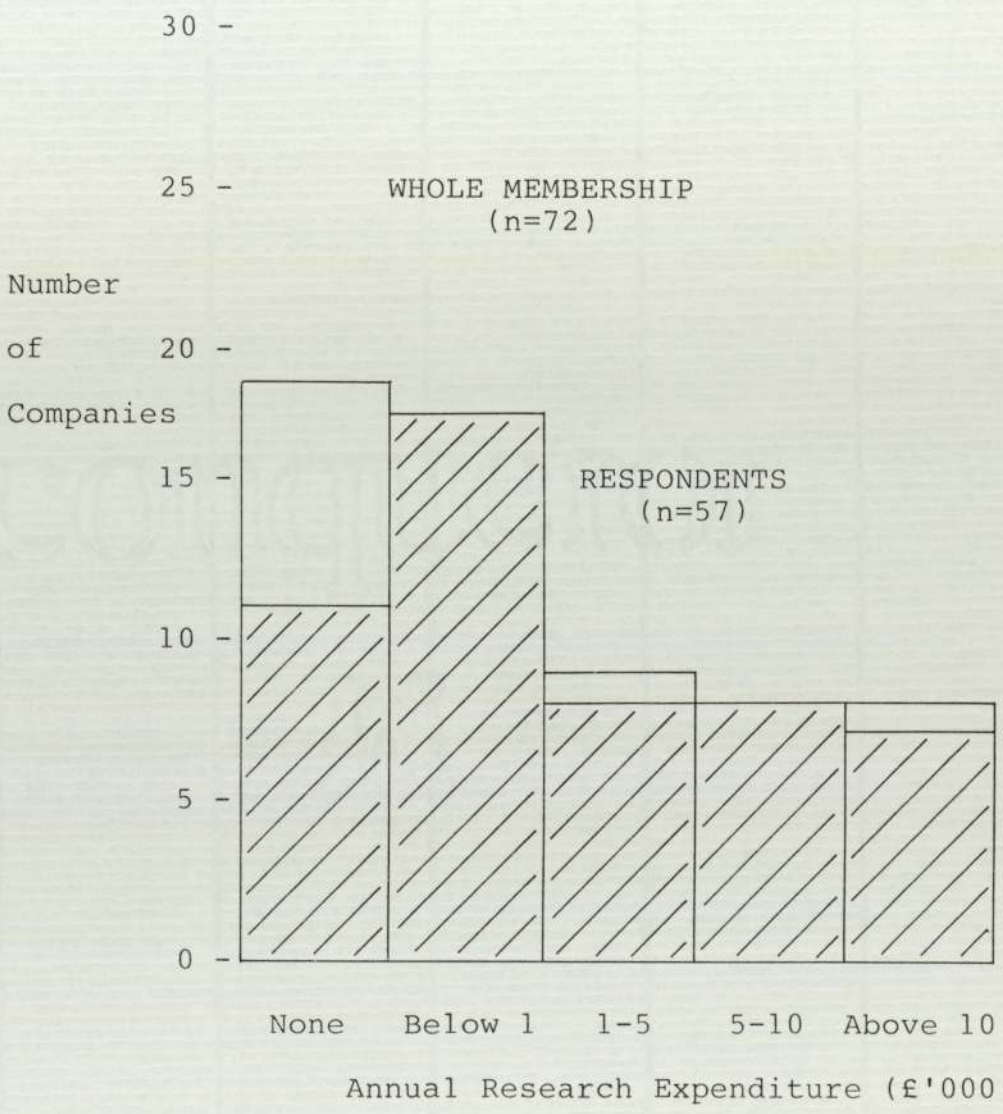
A.1.3 RESULTS

A.1.3.1 Company Information

Fifty-seven questionnaires were returned (79% response rate) and the remaining 15 managers were telephoned to assess the nature of the non-response. Lack of time was the primary reason given but with most of the non-respondents having little or no experience of research (Graph A1) some may have felt the initial questions

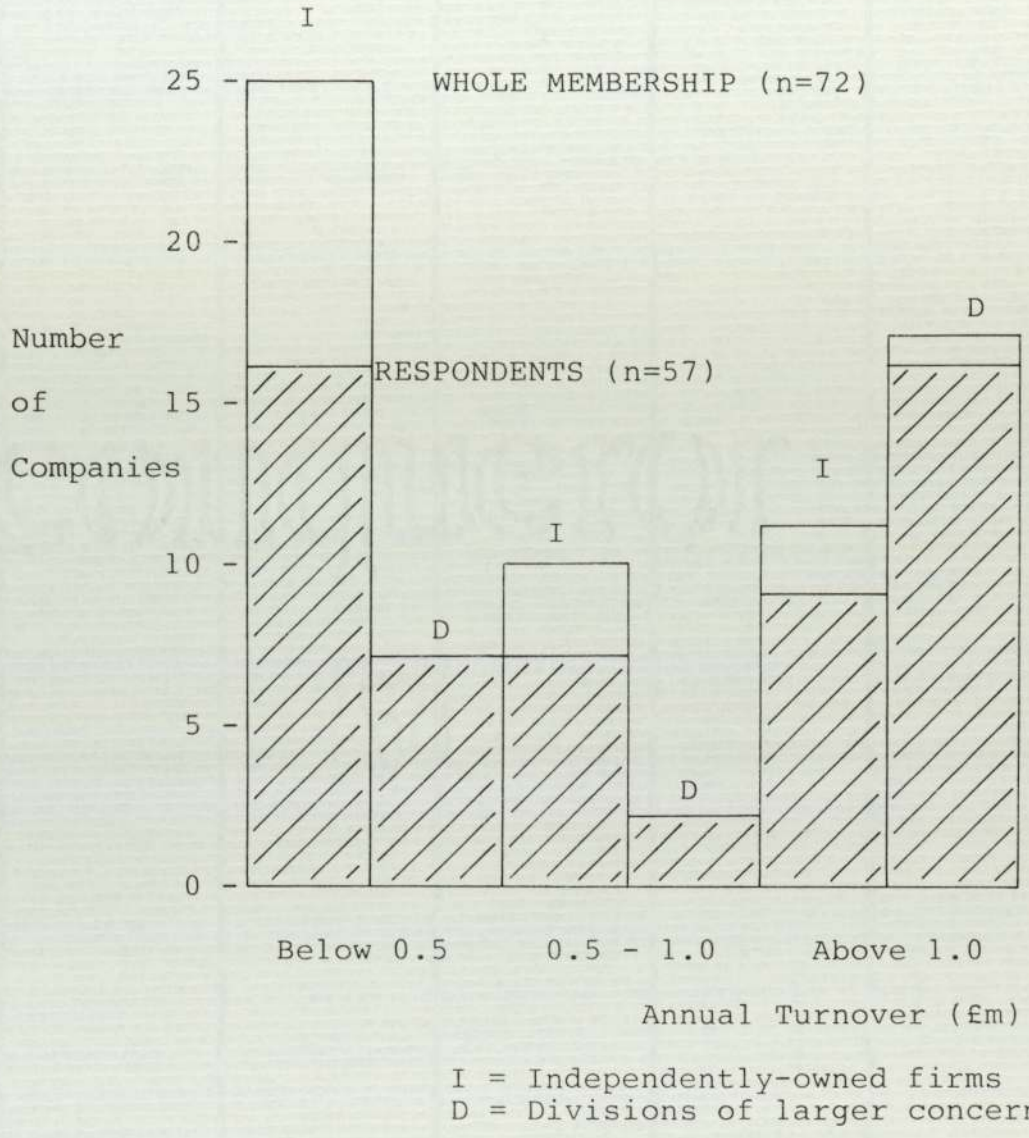
irrelevant.

Graph A1: A Comparison Between the Respondent Companies (shaded) and the Whole Membership on the Basis of Annual Research Expenditure.



Sixty per cent of the non-respondents were, in fact, from companies with annual turnovers of below £500,000 and all but one were independently-owned (Graph A2). In terms of products manufactured all sectors were represented by the respondents and it was noted that nearly all the companies were active in more than one sector and some in as many as ten.

Graph A2: A Comparison Between the Respondent Companies (shaded) and the Whole Membership with Respect to Annual Turnover and Ownership



I = Independently-owned firms
D = Divisions of larger concerns

A.1.3.2 Past Experience of Research

Sixty per cent of the responding companies spent less than £1,000 each year on research and three-quarters of them spent less than £250 a year.

The larger companies were more likely than the smaller companies to have a research budget and to spend some

money on research. However, the amounts they spent varied from almost zero to £100,000 per annum. It appeared that almost half the companies with turnovers over £1 million per annum undertook research on an ad hoc basis, some not buying research every year.

Overall, the most frequently used data sources were published gardening reports and commissioned research. Syndicated services and, in particular, continuous data collection methods were used primarily by the large multi-divisional companies. Firms of all types used desk research - this being the most commonly used method of research - the most frequently collected information being market size data. Generally companies collected an equal amount of consumer and trade information with about two-thirds of the respondents obtaining both types of data.

The twelve managers who reported no research undertakings were all from companies turning over less than £1 million per annum and all but two were independently owned. They attributed their lack of purchases to the high cost of research and a lack of personnel. In addition, eight research users explained why they did not do more research and of particular importance was the unavailability of relevant research.

A.1.3.3 Future Wants for Information

Both the users and the non-users of research wanted the same amount of future information, with one quarter of each group wanting an average of around seven of the information types listed. All but five companies (from both groups) wanted market size values, these five preferring consumer or trade opinions on products.

Comparisons with a hypothetical, random selection of information types confirmed that the only significant preference was for current market sector values.

Prior research use did not seem to be related to the level of detail required by managers. Company size, however, was important to the extent that managers from large companies wanted branded data and those from small, regional companies preferred data on certain regions. In general, most companies wanted the maximum amount of detail.

In terms of consumer information over three-quarters of the respondents wanted data about garden-product ownership and where plants were grown.

A.1.4 DISCUSSION

Stage One had indicated that company size, internal and external structure, research experience and the products manufactured can all affect research purchases. This study showed that two factors, the products made and internal structure, may be less important than the others. Unlike the last survey, no relationship was found between research methods used and the products produced but, with the high diversity of companies' product ranges, trends may have been obscured. Internal structure, as defined by the presence of marketing personnel, also proved to be a poor indicator of research use, with some "Marketing Managers" reporting little or no research use.

Concerning the remaining three factors there was a link between company size, external structure and past use of research. A number of dimensions of research use were measured including expenditure, frequency and type of

information taken. The relationship shown below (Table A1) was found to be true in all but one case. This was where a frequent desk-research user reported receiving a large number of information types on a planned and frequent basis whilst spending little or no money on its collection. After discussions with the manager, it was concluded that the 'low' research use category most closely described his activity because the research often lacked depth, relevance and accuracy.

Table A1: The Relationship Between Different Measures of Research Use

RESEARCH USE	EXPENDITURE (£'000's pa)	FREQUENCY		NUMBER OF DATA TYPES TAKEN
		Planned/ Erratic	Month/Year/ Less than yearly	
NONE	0	n/a	n/a	0
LOW	BELOW 1	Erratic	Less than yearly	1-3
MEDIUM	1-5	Planned	Less than yearly	4-5
		Erratic	Yearly	
HIGH	5-10	Planned	Yearly	6-7
		Erratic	Monthly	
VERY HIGH	ABOVE 10	Planned	Monthly	8-11

Table A2 indicates the median level of research use for companies of the same size and structure. It shows that the large multi-divisional companies were likely to have done more research than either smaller companies or 'independent' companies of a similar size. Additional information from the fifteen non-respondents (collected by follow-up interviews) made no change to this pattern. Again, it is suggested that the need for intra and

inter-company communication in larger and divisionalised companies has an effect here.

Table A2: The Median Level of Research Use for Companies of a Certain Size and Ownership

		COMPANY STRUCTURE Independent Unit	Multi-Divisional	NUMBER OF COMPANIES
ANNUAL TURN-OVER (£M p.a.)	Below 0.5	NONE	LOW	23
	0.5-1.0	LOW	LOW	9
	Above 1.0	MEDIUM	HIGH	25
NUMBER OF COMPANIES		32	25	57

The final factor considered in the last survey was the influence of research experience on managers' attitudes to future purchases. In this study, past users felt that research relevance was important in influencing purchase decisions whereas non-users were more concerned about cost and personnel factors. Perhaps then, after experiencing the benefits of research managers become less concerned about cost factors and more about potential benefits. It is possibly this transition which explains the more favourable attitudes of users than non-users towards research purchases. Managers' concerns about insufficient personnel also highlighted the previously mentioned (Stage One) need to help members to understand and use the research provided. In addition, the fact that over half the respondents had little or no experience reinforced the need for education in market research methods.

Whatever their level of past experience, however, it appears that managers wanted to receive the same types of

information. Future information wants were similar to data collected by other companies (Chisnall 1981; Twedt 1978). However, the level of market research activity of the G.I.M.A. companies, even taking into account the different turnovers of the companies involved, was far below that of American consumer-goods companies (Twedt 1978). This was particularly true of consumer-oriented studies, advertising research and the whole variety of continuous data collection techniques. Overall, American consumer-goods companies spent at least eight times that of G.I.M.A. companies of a similar size.

The most frequently requested information types concerned market sizes and attitudes to new products (Exhibit A1). Another measure of the most needed research type was the difference between research users' past and future information wants. This represented the area of greatest hitherto unsatisfied need and occurred in the new product and trade research areas. Evidence elsewhere indicates that managers are dissatisfied with new product research (Simmons 1982) but it had been thought that managers, in relying on salesforce reports, often fail to see the need for trade research (Simmons 1980). It is possible that, in an Industry like the Garden Trade which depends so heavily on wholesalers as well as retailers, trade research is seen as more important than in other types of Industry.

Which of these two measurements was correct and, indeed, which information type was the most needed was impossible to assess with any certainty especially since some managers indicated a requirement for all types of information. In addition, the results of this survey

differed from those of Stage One which had indicated a primary need for consumer attitudes. This may have been because of sample bias in Stage One but may have equally have been indicative of the fundamental differences in the methods of questioning. For example, during the interviews of Stage One, managers were able to freely put forward their information needs and may, by virtue of the fact that they were the first to mind, have only mentioned those which were of most importance to them. The options list used in this second stage questionnaire, however, may have prompted more than just managers' primary needs. Clearly, to resolve these concerns further research, which encouraged managers to rank their information preferences, was necessary.

Another area for future research concerned the fact that managers wanted information detailed at the product level. Although the product classification used (Exhibit A1) was more detailed than previously it still failed to adequately define companies' product ranges. Thus, the construction of a more detailed product classification was also necessary.

A.1.5 CONCLUSIONS

There appears to be a relationship between both the size and structure of a company and the amount of research it purchases. The larger companies which operate as a division of a larger concern are far more likely to purchase research than smaller independently-operating firms. Another factor - past use of research - seems to influence managers' overall receptiveness to future purchases but decisions concerning which information to

buy were independent of previous experience.

Companies of all types wanted to know the value of their markets in terms of products, regions and consumer types. However, further research was needed to substantiate whether this type of information was not only required by the majority but that it was also of primary importance to them. In addition, a more precise product classification was needed to provide a workable definition of the product markets.

The inexperience of managers and the importance of personnel shortages reinforced the need to help managers understand and use market research. Two methods have already been suggested; the design of a Market Research Seminar to educate managers in the use of research and the provision of an advice service as an integral part of a co-operative research system. A Market Research Seminar was run in December 1982 and is described in Chapter Four.

APPENDIX TWO

STAGE 2: THE SELF-ADMINISTERED QUESTIONNAIRE

PART TWO - December 1982

A.2.1 INTRODUCTION

The aim of this second questionnaire was to find out which of a manager's information options were most important to him. So that comparisons could be made with previous data, the same option list as appeared in the preceeding questionnaire (Appendix One) was used.

A.2.2 METHOD

The questionnaire (Exhibit A2), which was distributed at the 1982 December Seminar asked managers to indicate their information needs (as before) and then rank the five which were most important to them ('1' being most important). In addition, managers were asked to put forward information types not included on the list and where these would have ranked in their top five choices.

The results were analysed by:

(1) comparing the overall results of this questionnaire with those of the previous one (Appendix One),

(2) comparing the information choices of the managers who answered both this and the previous questionnaire to look for consistent needs for information, and

(3) examining the frequency with which the options were ticked and their ranks to see if all managers displayed similarities in their preferences.

Exhibit A2: Example of the Second Questionnaire Form

G.I.M.A. MARKET RESEARCH PROJECT

1) Please tick in column (A) the Market Research data which your company needs (you may tick more than one)

2) In column (B) please rank the five most important needs of your company ('1' is the most important)

	(A)	(B)
MARKET SIZE		
The value of the market sectors in which you are competing	___	___
The value of the market sectors in which you may wish to enter	___	___
PRODUCTS		
Attitudes towards existing products/pricing/promotions etc.	___	___
Attitudes towards new products	___	___
The competitive characteristics of your products	___	___
Information concerning your competitors' products	___	___
CUSTOMERS		
The characteristics of the consumers who buy/do not buy your products	___	___
Information concerning the frequency of purchase/usage	___	___
MARKETING		
Information concerning the distribution of your products	___	___
Attitudes towards new and/or existing advertisements	___	___
Opinions of the Trade towards products/advertising etc.	___	___

3) Does your company need any information which is not on the list above? If 'Yes' please state what this is.....

4) Would this information (from question 3) have ranked in the top five needed by your company? If 'Yes', where would it have ranked? .....

COMPANY NAME ..... SIGNATURE.....

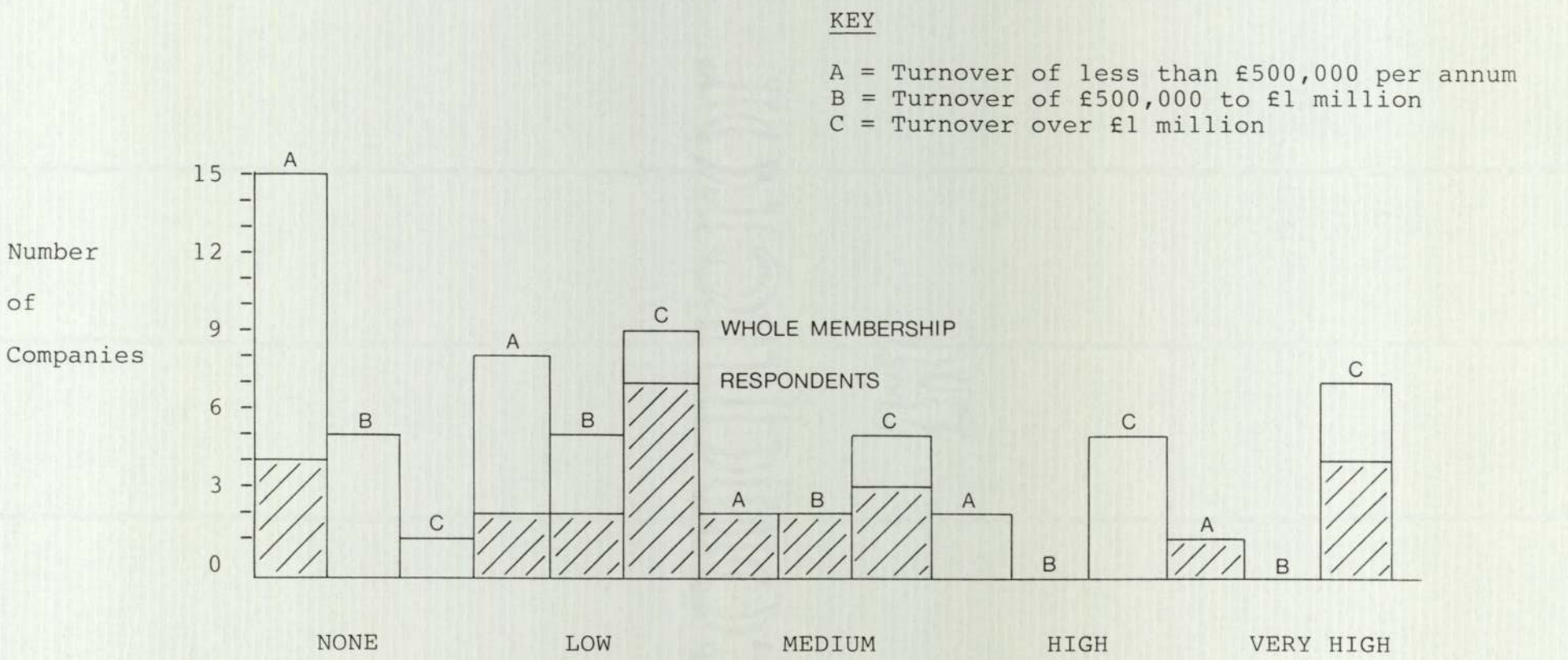
The effect of the additional information types on the ranket daa was also examined.

A.2.3 RESULTS

The initial distribution which resulted in the return of twelve questionnaires, was followed by a mailing which generated a total of thirty replies (45% of the membership). Compared to the characteristics of the whole G.I.M.A. membership the responding managers under-represented the small company (below £500,000 turnover per annum) which operated as an independent unit and did not use research (see Graph A3). All product sectors were covered by the responding companies.

The lower response rate compared to the last questionnaire (Appendix One) may have been due to a number of factors. Firstly, it may have been a more difficult time of year for the managers and, with the approach of Christmas, some questionnaires may have been lost either at the company or in the post. What is more probable, however, is that a small number of managers (for one reason or another) did not answer questionnaires on market research. As one might expect, this group was identified in this and the previous study (Appendix One) to be small firms with little or no previous experience of research. In fact, only two of the non-responding companies from the first survey answered the second one and both managers may have been prompted into action by their attendance at the Market Research Seminar (Chapter Four) which occurred in the interim.

Graph A3: The Size and Research Use of Companies from the Whole Membership and those Responding to the Second Questionnaire(shaded)



A.2.3.1 Analysis One

Table A3 shows the overall results of this questionnaire and those of the previous study (Appendix one).

Table A3: The Results of the Stage Two Questionnaires

	OPTION NUMBER	NUMBER OF RESPONDENTS TICKING OPTIONS IN THE: FIRST QUESTION-NAIRE (n=57)	SECOND QUESTION-NAIRE (n=30)
MARKET SIZE			
The value of the market sectors in which you are competing	1	47	27
The value of the market sectors which you may wish to enter	2	41	21
PRODUCTS			
Attitudes towards existing products/pricing/ promotions etc.	3	36	24
Attitudes towards new products	4	42	22
The competitive characteristics of your products	5	31	23
Information concerning your competitors' products	6	37	25
CUSTOMERS			
The characteristics of the consumers who buy/do not buy your products	7	32	21
Information concerning the frequency of purchase/usage	8	32	18
MARKETING			
Information concerning the distribution of your products	9	39	23
Attitudes towards new and/or existing advertisements	10	28	14
Opinions of the Trade towards products/advertising etc.	11	37	20

Two tests can be used to compare these results, the F-test and the chi-squared test. The first indicated that the mean number of ticks given in each survey was not significantly different and on the second that only option

5 had significantly changed in popularity (5% significance level).

In both surveys the need for market sector values was widespread. In the first survey 93% of the respondents wanted information about either current and/or potential market sizes. The corresponding figure for this survey was 100% of respondents.

There were also a number of other similarities between the two sets of results. For example, the percentage of managers indicating a requirement for all data types was 23% and those wanting all but one data type was 10% in both cases. As can be seen from Table A3, option 1 was consistently the most popular and option 10 the least. In addition, option 9 remained in fourth place. Despite these three options remaining in the same places there was no overall correlation between the ranked positions of the options in the two surveys.

A.2.3.2 Analysis Two

Twenty-three of the managers answering this second questionnaire had previously answered the first one (Appendix One).

Only four managers chose exactly the same options both times. The other nineteen managers chose mostly the same, plus or minus a median of two options. Table A4 shows the consistency with which the managers chose their options in the two questionnaires.

Table A4: A Comparison Between the Options Chosen in the First and Second Questionnaires

INFORMATION TYPE		NUMBER OF MANAGERS TICKING OPTIONS IN: BOTH QUESTION-NAIRES	FIRST ONLY	SECOND ONLY	NEITHER QUESTION-NAIRE
1	Current-market sizes	21	1	0	1
2	Potential-market sizes	14	4	0	5
3	Attitudes to existing products	14	2	5	2
4	Attitudes to new products	13	3	3	4
5	Product characteristics	14	2	5	2
6	Competitor-product characteristics	17	1	4	1
7	Consumer profile	12	2	6	3
8	Usage data	13	2	1	7
9	Distribution data	14	5	3	1
10	Attitudes to advertisements	10	5	2	6
11	Opinion of the Trade	12	3	4	4

The results of this chi-squared test showed which options were consistently ticked both or neither times and which were inconsistently chosen. They showed that options 1, 6, 8, 2 and 4 (in that order) were the most consistently chosen, with option 1 (current market sizes) and option 6 (characteristics of competitors' products) showing the highest favourable choice.

A.2.3.3 Analysis Three

Table A5 shows the ranked importance which managers' attributed to each information type.

Table A5: Managers' Information Requirements and their Ranked Importance (n=30)

OPTION NUMBER	INFORMATION TYPE	NUMBER TICKING OPTION	NUMBER RANKING OPTION: 1	2	3	4	5	TOTAL RANKING OPTION	SCORE*
1	Current market sizes	27	14	6	2	3	1	26	107
2	Potential-market sizes	21	6	3	0	0	1	10	43
3	Attitudes to existing products	24	6	2	4	5	4	21	64
4	Attitudes to new products	22	1	3	1	6	1	12	33
5	Product characteristics	23	1	3	3	2	5	14	35
6	Competitor-product characteristics	25	1	0	4	4	7	16	32
7	Consumer profile	21	0	6	7	1	3	17	50
8	Usage data	18	0	0	1	4	1	6	12
9	Distribution data	23	1	6	6	3	2	18	55
10	Attitudes to advertisements	14	0	0	0	0	3	3	3
11	Opinion of the trade	20	0	1	2	2	2	7	16

* Obtained by assigning a first choice with 5 points, a second with 4 points and so on.

The significance of current market size information is seen by the high number of managers ranking it first or second. The peculiar distribution of ranks for potential-market sizes may reflect the fact that the need for it only arises when a manager is considering entering a new market. In terms of primary needs then, current and potential-market sizes and attitudes to existing products were important. Consumer profile and distribution data were generally secondary and tertiary needs.

Spearman's rank correlation showed that companies varying in size, research use and ownership exhibited no

significant differences in the ranks given.

Managers were finally asked to put forward additional data types not included on the inventory and the ranks they would have assigned to them. Ten managers put forward additional information types (Table A6).

Table A6: Additional Information Types Put Forward by Managers

INFORMATION TYPE	INDICATING DATA TYPE	ASSIGNED
MARKETS		
Market Shares - ours plus competition's	2	2, 2
PRODUCTS		
Why garden-owners buy seeds	1	3
CUSTOMERS		
Potential consumer sales by product type	2	3, 3
Actual consumer sales	1	1
Consumer profiles	1	2
DISTRIBUTION		
Future role of different outlet types	1	1
PROMOTION		
Average advertising expenditure by product group	1	5
OTHER		
European Market statistics	1	2
TOTAL	10	

Taking account of these information types and their ranks the order of the top 10 information options are the same. The eleventh option, attitudes to advertisements, scored only three points, thus all the additional data types (except advertising expenditure) would have been positioned above it.

A.2.4 DISCUSSION

The results of this and the previous questionnaire showed an important and primary need for market sizes and trends. It seems likely that the differences between these results and those of Stage One were due to sampling bias in the first stage of the investigation.

As in the first quenstionnaire (Appendix One) this second survey contained some bias due to non-response from small and non-research-user companies. The effects of such bias on the results is difficult to assess since no evidence has been collected to support the hypothesis that different types of firms have different research needs.

Analysis One showed that the results of the two questionnaires were not significantly different and that the most important fact emerging was the need for market sector values. Compared to the results of the previous survey (Appendix One) there was a slight increase in the popularity of information concerning products' competitive characteristcs. This may have been due to the different times in the Trade year when the two surveys were mailed. The first went out in September when the manufacturers sell their products to the wholesalers and retailers. By January, the time the second questionnaire was mailed, manufacturers are planning their promotions for when the 'Trade' sell to the consumer (around April).

The most consistently chosen information types for the two questionnaires concerned current-market sizes and characteristics of competitors' products. However, the former data type was by far the most important, scoring over three times the number of points of the latter type. The results also showed that all but three managers

required current-market size data and all but four considered it important enough to be placed among their top five information needs. Indeed, almost half the respondents put current-market size information as their top priority.

Some managers did suggest alternative information types in which they would be interested. These were varied but their addition to the ranks did not affect the main results.

A.2.5 CONCLUSIONS

The objective of this second questionnaire was to find out which information options were most important to each manager. Nearly all the respondents thought that information about the value of their current markets was important enough to rank in their top five options. In fact, two-thirds of them considered this a primary or secondary need. Overall, this option received one quarter of the total possible score, almost twice that of consumer attitudes to products which came second with 14%.

Since factors like company size, structure, research use and products manufactured were again (first questionnaire and Stage One results) not found to be linked to future research needs, it was difficult to assess the effect of non-response bias. With only 45% of the membership responding to the questionnaire and a large number of the non-respondents again coming from the small, independently owned, non-research users, a further effort to understand these managers' needs was clearly desirable.

In addition, although respondents both to this and the previous questionnaire had indicated needs for market size

data, the first had not asked managers to rank their options and it was not clear whether managers' priorities for information would change with time. In fact, since Stage One had clearly indicated the need for data to be relevant to current marketing problems it was indeed possible that priorities would shift with time. Another concern lay in the possible influence of different methods of questioning on managers' responses.

It was desirable to allow managers the freedom to state their future research needs (as in Stage One) whilst constraining them sufficiently (as in Stage Two) to secure longitudinal data. Thus a final research stage was proposed which also sought to assess the relative importance of different factors affecting managers' research purchases. Such information had been collected in the first stage and had important implications for the final research proposals.

APPENDIX THREE

RESULTS OF STAGE THREE: THE MODIFIED DELPHI TECHNIQUE

Managers were asked to state their information needs and the factors most likely to affect their information purchases. Then, after considering statements from the Stage One results, they were asked to rank the five which were most important to them. These statements have been divided into various categories.

QUESTION A

COMPANY CODE	INFORMATION CATEGORY	RANK
	MARKET DATA	
	MARKET SIZE ONLY	
1	Size of market	0
2	Market size	3
5	The overall market for peat and peat based products	1
7	The size of the U.K. market for Garden wheelbarrows	1
13	Market size; Market share	1; 2
22	Market share - Overall	1
28	Size of market	0
29	How many gardens are there in the UK	1
30	Market size	1
31	Total size of market for my type of product; Our share of market	1; 2
34	Market size in particular areas	1
35	The size of my market; The % I have now	0; 0

MARKET TRENDS

11	Trade market trends	1
15	Market potential	0

MARKET SIZE AND TRENDS

3	The size of the market; Its growth/ decline for a 5 year period (TRENDS)	2; 1
4	The size of the Horticultural label market; Future trends	1; 2
6	The total weedkiller market; The general trend of chemicals	0; 0
8	Market size; Market growth; Market segments and relative growth	1; 2; 4
9	Total market size; Our share of market; Market movement	1; 3; 2
10	Potential market; Actual market; Our share of actual market	1; 2; 0
14	Volumes; Trends	1; 2
16	Size of market; Market trend (increase or decrease); Current market share	1; 2; 3
19	Market size (by sector); Market trends (by sector)	1; 2
20	Size of market and breakdown by product group; Trends of market	1; 2
25	Market size; Market trends	0; 0
26	Potential growth in market; Market size and our share	0; 0
27	Size of market and our share; How our share has changed; Overall trends	0; 2; 5
32	Market size and trends	5
33	Size of market (existing); Potential for growth in market	1; 2
37	Size and trend of garden market; Size and trend of our sector of garden market; Our market share	4; 1; 2

COMPETITOR DATA

COMPETITORS' SHARES

2	Market share of competition etc.	0
3	Competitors market shares	4
8	Other market shares	3
10	Competitors shares	0
18	Market shares (own & competitors)	1
20	Breakdown by brand share	3
22	Share of competitive products	2
27	Competitors shares	0
28	% Market shares by supplier	2
35	The % my competitors have	2
37	Other companies market share	3

COMPETITIVE ACTIVITY

1	Competition	0
3	Competitors strengths and weaknesses	5
6	New products being introduced	0
7	What % of the market do imports take	5
11	Competitor activity in the market	4
13	Number of manufacturers in product group	4
15	Competitors penetration	3
19	Competitive activity	3
29	How much competition in the business is there?	5
30	Products on the market from competitors	0
31	Relative growth rate of competitive types of growing media	4
34	How well competitors alternative products are selling	4

DISTRIBUTION DATA

BEST OUTLETS

5	Percentage of overall market that goes through nurseries, Garden centres and multiple D.I.Y.	3
7	% market held by wholesalers; multiples; cash & carry outlets	2; 3; 4
10	Shares held by different types of retailers	0
13	Potential outlets	0
14	Outlet selection	3
20	Breakdown of sales to Garden Centres, Multiples, etc.	4
22	Shares by retailer outlet	3
23	Which is the most favourable outlet for the product	5
25	Actual sales by type of outlet	2

DISTRIBUTION AND STOCK

1	Outlets where product is sold	0
8	Distribution pattern	0
11	Trade distribution and stockholding of product range	5
13	Availability of product from current manufacturers	3
19	Position of own products	5
21	Retail stock levels by sector, brand, season, region, outlet	2
22	End of season stock at retailer level; and wholesaler level	5; 4
24	Distribution and availability of products	5
25	Depth of distribution by type of outlet	3
28	Channels of distribution	0
31	Distribution coverage	3

TRENDS

25	Changing patterns (distribution) over a period of years	4
27	Change in selling trends	0
28	Trends in market structure	3

GENERAL

2	Lists and breakdowns of producers and retailers	0
5	The % of the overall market taken by the grower industry, including L.A.s and Landscaping	2
34	How well products are selling	0

CONSUMER ATTITUDES

PRICE

12	The measurement of price sensitivity (consumer) - bulbs, roses and nursery stock	1
14	Pricing	4
17	Price range	3
23	To what extent will price influence sales	2
26	Relative importance of quality, service and price	0
29	How much would the public consider paying for a Garden pool?	4
31	Importance of price vs. quality	5

PROMOTION

18	Acceptability of consumer promotion	0
24	The effects of publicity, advertising etc. on consumer purchases	4

PACK/PRODUCT

12	Instructions/advice/problem solving required by consumer on pack;	4
	Packaging for roses (n/s) preferred by consumer	3
14	Styling	5

17	Pack design? ; Size of pack?	0; 0
18	Acceptability of packs	4
23	To what extent does display packaging affect sales appeal	4
26	Consumer reaction to colour of plastic horticultural products	3
	NEW PRODUCTS	
17	Possible demand	0
18	Acceptability of potential new products	3
23	Will it appeal to households in C + D income groups?	3
24	Attitudes towards our company's new products	3
30	Consumer attitudes towards new products	2
	BRAND AWARENESS	
15	Brand awareness	0
18	Brand awareness	2
21	Brand awareness/image - heavy vs. light users	4
26	How important is a brand name in horticulture?	5
37	Degree of brand awareness	5
	GENERAL	
9	Consumer opinion of the product	4
11	Acceptance and desirability of products by consumers	2
15	Are purchases impulse or premeditated (of our products)	0
16	Consumer market requirement; Consumer perception of existing brand	4; 5
24	Attitudes towards our company's existing products	2
28	Trends in consumer attitudes	0

29	How many people with a garden would consider buying a garden pool?	2
30	Consumer attitudes to products	0
34	Attitudes towards certain products; Attitudes towards competitors alternative products	0; 5
35	Am I selling the products the public want to buy?	3

CONSUMER PURCHASES

PRODUCTS BOUGHT

4	Number of plants sold with or without a label	5
11	New product and consumer purchasing market trends	3
12	Varieties most sought after by consumer-hierarchy of wants	5

WHERE BOUGHT

12	Retail outlets most favoured by consumer for purchasing garden products	2
15	Consumer preferences for types of retail outlet	0
29	Where would the public go to buy a garden pool?	3

PRICE PAID

1	Price bands	0
2	Costs, prices of products. Retail prices etc.	4
19	Price data	4
30	Market prices and trends	0

WHO BUYS

21	Consumer sales - sector, brand, region, outlet type	1
24	Consumer purchases	1
33	Profile of garden product purchasers	4

	USAGE	
21	Consumer usage/habits/attitudes by age and socio-economic class	3
	GENERAL	
2	Geographical areas of market, areas of prosperity	5
6	The average amount a gardener spends on weeds	0
	CUSTOMER ATTITUDES	
4	Demand for picture labels vs "type only"; Market for in-house labelling machines	3; 4
5	What currently is the estimation of % over capacity in production of peat	4
21	Retailer attitudes - products/ manufacturers/promotional and merchandising techniques	5
31	Customer attitudes to marketing vehicles i.e. Trade Show catalogues; Attitudes of wholesalers/retailers to future trends	2; 4
	WHAT TO MAKE	
17	What to make	2
23	What products to manufacture in my field	1
32	Identification of possible markets to enter	1
33	New areas for development/diversification	3
35	Where can I find additional markets	4
	MISCELLANEOUS	
3	Advertising expenditure	0
20	Effect current economy has on market	5
32	Importance of marketing strategies	3
36	How best to apply marketing methods; What marketing methods to apply in a given situation; Clearer definitions of marketing methods; How best to apply marketing methods to the small company; How best to interpret the results of MARKET research	0; 0 0; 0 0

QUESTION B INFLUENCING FACTOR

FINANCE

COST

1/2/3/ 8/9/10/ 11/13/14/ 15/16/17/ 18/20/21/ 22/25/26/ 27/28/31/ 33/34/35/ 37	Cost/price of research	0; 3; 3 1; 4; 4 4; 2; 0 0; 1; 0 3; 1; 4 0; 0; 0 0; 0; 1 1; 0; 0 1
30	How expensive	1
7	Initial cost; Annual cost	0; 0
32	Relative cost - solus or shared?	5

FUNDING

12	Possibility of cost sharing - e.g. HTA, IGCA	5
24	Who funds the survey	3

COST/BENEFIT

16	All decisions would be cost/benefit related	2
19	Cost - versus potential profit	2
23	% cost of research in relation to 2 years sales	2

CAPITAL AVAILABLE

12	Cash available; Whether cash available can adequately buy research required	1; 2
17	Capital available	4

ACCURACY

1	Accuracy of information	0
2	If the information is reliable	0
4	Accuracy	0
7	Confirmation of its reliability	0
9	Confidence in the information available	1

10	Confidence in data provided	3
11	Accuracy of research and information	5
12	Demonstrably adequate research techniques	3
13	Accuracy of information	1
14	Belief in it	1
18	Accurate	1
19	Accuracy and acceptability by the trade	1
20	Accuracy of information	4
21	Accuracy/statistical validity	3
23	Accuracy of information obtained	1
25	Anticipated accuracy	0
26	Can we believe the results	0
31	Reliability	4
32	Confidence in the accuracy of research completed	1
34	Will the information be accurate	0
35	Is the information reliable	0
37	Anticipated accuracy	2
	ACCURACY OF THE SAMPLE	
15	Accuracy (scale of research)	0
22	Size of sample	0
24	Size and make-up of sample	1
33	Source; Size of sample	2; 3
	REPUTATION OF MARKET RESEARCH COMPANY	
3	The quality of the researcher (REPUTATION)	1
12	Full presentation by Horticulturally aware agency (Pre-research)	4
30	Is the survey conducted by specialists who know the market	3

UNDERSTANDING

UNDERSTANDABILITY

14	"Understandability"	2
18	Understandable	2
22	Data to be supplied in an understandable form	3
24	Clarity and comprehensibility of information and results	2
26	How well presented is the information (easy to absorb)	0
35	Can it be understood	0

HELP IN UNDERSTANDING

19	Advice on sources of data	4
31	Time to study it; Staff available to use it	3; 5
34	Firm not large enough to make use of information effectively	3

RELEVANCE

PRODUCTS/MARKETS

2	Is there information relative to the products and market we are in; Is information of the products we produce in depth and accurate	0; 4
3	The relevance of the research to my products; The depth of the research; The geographical areas covered	2; 4; 5
11	Relevance of the research to own business	3
14	Ease of identifying own products	3
23	Is information obtained specific rather than general; Can research pinpoint likely sales volume for a specific product; What geographical area does info cover, i.e. local, national, international	3; 4; 5
25	Relevance to our business	0
25	Is it precisely relevant to our market	0

28	Does data apply to our products?	0
30	Is the information from the survey relevant?; Are my products correct to the survey?; How deep is the survey into the market?	2; 0; 0
31	Relevance to our part of the market	2
34	Will the information relate to our particular products; Market research tends to be nationwide. Not for one specific area	0; 1
	COMPANY	
2	% of information	2
5	To assist Company planning and forward thinking on both sales and production sectors of our company	1
11	Importance of the information to current activity and planning	2
15	Relevance to our current plans	0
17	Production capacity	5
20	Relevance to own company information	2
26	Do we really need it to succeed	2
27	Genuine interest	5
28	Is it likely to increase our profits; Curiosity in the information	3; 0
29	To improve our outlets; To improve our turnover; To ensure that we are selling what the public wants to buy; To find out what the potential is for future sales	0; 0; 0; 0; 0
32	Relevance of research in future planning; Relevance to corporate objectives	3; 2
35	What use is the information likely to be	4
	TIMING/SPEED	
4	How soon the data could be provided	3
9	Date of availability	0
20	Availability of information i.e. annually or otherwise	3

21	Fast reporting (consumer sales)	0
24	Timing and speed of return	4
25	Frequency	0
32	Timing of the research	4
37	Frequency	3
	TRENDS	
9	Whether one off or on-going	0
19	Continuum - not once off data	3
22	Guarantee of continuing research	0
	UNIQUENESS/COMPATIBILITY	
1	Information supplied we don't already know	0
10	Inability to discover all items on Question A ourselves	1
11	Availability from other sources	1
24	Whether data is compatible with past or future survey	5
27	Must provide information unavailable elsewhere	4
	MISCELLANEOUS	
13	Research for new products	
15	Confidentiality (i.e. who else is this information available to)	5
21	Confidentiality	0
28	Will it list names of prospective customers	5
36	Prior information about the market from market research; Prior information about the consumer; Prior information about the trade	0; 0; 0

APPENDIX FOUR

HORTICULTURAL TRADE ASSOCIATION SURVEY

A.4.1 ALPHABETICAL ORDER OF ASSOCIATIONS

B.A.	Barbecue Association
B.A.A.	British Agrochemicals Association
B.A.G.M.A.	British Agricultural and Garden Machinery Association
B.A.H.P.A.	British Agricultural and Horticultural Plastics Association
B.H.F.	British Hardware Federation
B.L.M.F.	British Lawnmower Manufacturers Federation
B.P.P.G.A.	British Pot Plant Growers Association
F.B.H.T.M.	Federation of British Hand Tool Manufacturers
GARDENEX	Federation of Garden and Leisure Equipment Exporters
F.M.A.	Fertiliser Manufacturers Association
G.I.M.A.	Garden Industry Manufacturers Association
H.T.A.	Horticultural Trades Association
I.G.C.	International Garden Centre (British Group) Ltd
J.I.M.A.	John Innes Manufacturers Association
L.O.F.A.	Leisure and Outdoor Furniture Association
U.K.A.S.T.A.	United Kingdom Agricultural Supply Trade Association, Consumer Packet Seed Committee
W.H.A.	Wholesale Horticultural Association

A.4.2 TRADE ASSOCIATION QUESTIONNAIRE

GENERAL

NAME:_____

ADDRESS OF H.Q:_____

_____

_____

NUMBER OF MEMBERS:_____(indiv's)_____(firms)_____(associates)

QUALIFICATIONS FOR MEMBERSHIP:_____

_____

_____

WHAT PERCENTAGE OF THE POTENTIAL MEMBERSHIP ARE MEMBERS?____%

WHAT PERCENTAGE OF THE MEMBERS ARE IN THE GARDEN INDUSTRY?__%

IN WHAT WAYS DOES YOUR PRESENT MEMBERSHIP UNDER-REPRESENT THE POTENTIAL MEMBERSHIP:_____

_____

_____

_____

HOW IS THE SUBSCRIPTION FEE ARRIVED AT? flat fee ☐

turnover ☐

other (please state) ☐

NUMBER OF ASSOCIATION STAFF: Full-time:_____

Part-time:_____

ARE YOU ASSOCIATED WITH ANY OTHER ORGANISATION? Yes ☐

No ☐

IF YES, WHO ARE THEY and IN WHAT WAYS ARE YOU ASSOCIATED?

_____

_____

PURPOSE

LIST IN ORDER OF IMPORTANCE THE ASSOCIATION'S OBJECTIVES:

PRIMARY:_____

_____

SECONDARY:_____

_____

TERTIARY:_____

_____

OTHERS:_____

_____

DATE OF ORIGIN:_____

PURPOSE OF ORIGIN:_____

_____

ACTIVITIES:

LIST IN ORDER OF IMPORTANCE THE ASSOCIATION'S ACTIVITIES:

_____

_____

_____

_____

_____

WHICH OF THE THREE MOST IMPORTANT ACTIVITIES WERE LESS IMPORTANT 10 YEARS AGO? (OR SINCE ORIGIN)?_____

WHY?_____

HAVE THERE BEEN ANY CHANGES IN AIMS OR PURPOSE IN THE LAST TEN YEARS?(OR SINCE ORIGIN)_____

_____

WHY DO YOU THINK THIS IS?_____

_____

HOW DO YOU KEEP ABREAST OF THE CHANGING NEEDS OF THE MEMBERSHIP?_____

DO YOU HAVE ANY SPECIALIST GARDEN INDUSTRY COMMITTEES? YES ☐
NO ☐

IF YES, HOW MANY?_____

WHAT ARE THEIR FUNCTIONS?_____

BUDGET

HOW MUCH IS THE ANNUAL BUDGET: LESS THAN £10,000
£10,000-£50,000
£50,000-£100,000
£100,000-£500,000
GREATER THAN £500,000

HOW MUCH IS SPENT ON (a) COLLECTING, COLLATING AND DISTRIBUTING TRADE STATISTICS AND/OR MARKET INFORMATION?____%
(b) INTERNAL MEMBERSHIP EDUCATION? (services, pamphlets)____%

DO YOU OR ANYONE DESIGNATED BY YOU, UNDERTAKE MARKET RESEARCH ON BEHALF OF YOUR MEMBERS? YES ☐
NO ☐

IF YES, WHAT TYPE OF RESEARCH IS IT?_____

WHY DID YOU DECIDE ON THAT TYPE OF MARKET RESEARCH?

IF NO, HAVE YOU DISCUSSED THIS POSSIBILITY? YES ☐
NO ☐

WHAT WERE YOUR REASONS FOR NOT UNDERTAKING SUCH A PROJECT?

WOULD YOUR ASSOCIATION CO-OPERATE IN FURTHER TALKS ABOUT A CO-OPERATIVE MARKET RESEARCH SCHEME YES ☐
NO ☐

WHAT HAVE BEEN THE MOST SIGNIFICANT CONTRIBUTIONS OF YOUR ASSOCIATION TO THE INDUSTRY?_____

WOULD YOU PLEASE SEND ANY PUBLIC MATERIAL WHICH MAY HELP MY UNDERSTANDING OF YOUR ASSOCIATION, ITS ORGANISATION AND ITS OBJECTIVES.

SIGNATURE_____

POSITION_____ Thank You

A.4.3 RESULTS OF THE HORTICULTURAL TRADE ASSOCIATION SURVEY

In alphabetical order:

NAME: **Barbecue Association**

ADDRESS OF H.Q.: 60 Claremont Road
Surbiton
Surrey

NUMBER OF MEMBERS: 5 firms plus 3 associates

QUALIFICATIONS FOR MEMBERSHIP: Full members must be prime importers and/or distributors of barbecues and/or charcoal. Associate membership is open to bona-fide retailers of barbecues plus related products.

PERCENTAGE OF POTENTIAL MEMBERSHIP WHO ARE MEMBERS: Approximately 60%

PERCENTAGE OF MEMBERSHIP WHO ARE IN THE GARDEN INDUSTRY: 100%

WAYS IN WHICH THE POTENTIAL MEMBERSHIP IS UNDER-REPRESENTED: 3 to 4 other prime importers and/or distributors have yet to join

SUBSCRIPTION FEE: Flat fee

NUMBER OF ASSOCIATION STAFF: Part-time Secretariat

ASSOCIATIONS WITH OTHER ORGANISATIONS: None

OBJECTIVES OF THE ASSOCIATION: Primarily to enlarge the barbecue market by increasing public awareness of barbecue products.
Secondly to meet compeititors in a friendly atmosphere to achieve primary objective.
Thirdly to achieve wider publicity in the consumer press of an accurate nature.
Others: To achieve additional publicity on the Radio and T.V.

DATE OF ORIGIN: 1977/1978, orgiginally called "SKEWER"

PURPOSE OF ORIGIN: To pull together to achieve the above objectives

ACTIVITIES: Primary: Organising seminars in conjunction with the National Institute of Hardware to instruct retailers' staff so that they are able to give 'live' demonstration of equipment.
Secondary: To liaise with the media to ensure accurate reporting and factual editorial.

ANY CHANGES IN PURPOSE IN THE LAST 10 YEARS: None

WHY DO YOU THINK THIS IS: Our Industry is in its embryonic stages of development with quite substantial untapped potential.

RECOGNITION OF CHANGING MEMBERSHIP NEEDS: Not applicable because only 5 members.

GARDEN COMMITTEES: None

ANNUAL BUDGET: Less than £10,000 (very much so)

MARKET RESEARCH UNDERTAKEN: Submission to the secretariat details of members market share/turnover etc. confidentially to enable some estimates of market size to be prepared.

WHY WAS THE ABOVE TYPE OF MARKET RESEARCH DONE: Costs nothing

WILLINGNESS TO CO-OPERATE: Possibly

MOST SIGNIFICANT CONTRIBUTIONS TO THE INDUSTRY: Co-operation between competitors plus the instructional seminars.

Completed by Mr. Brian Lee, Chairman of the Barbecue Association.

NAME: **British Agrochemicals Association**

ADDRESS OF H.Q.: Alembic House
93 Albert Embankment
London SE1 7TU

NUMBER OF MEMBERS: 49 firms

QUALIFICATIONS FOR MEMBERSHIP: Companies manufacturing or with technical control of the manufacture of pesticides in the U.K. or who are substantial distributors of pesticides marketed under their own name are eligible for membership.

PERCENTAGE OF POTENTIAL MEMBERSHIP WHO ARE MEMBERS: Greater than 95% of pesiticides producers in the U.K. are members.

PERCENTAGE OF MEMBERSHIP WHO ARE IN THE GARDEN INDUSTRY: 27%

WAYS IN WHICH THE POTENTIAL MEMBERSHIP IS UNDER-REPRESENTED: Representation in the Garden Industry is pretty comprehensive.

SUBSCRIPTION FEE: By turnover

NUMBER OF ASSOCIATION STAFF: 5 full-time staff

ASSOCIATIONS WITH OTHER ORGANISATIONS: Chemical Industries Association is the B.A.A.'s parent association. The B.A.A. is a member of the C.B.I. and the British Crop Protection Council.

OBJECTIVES OF THE ASSOCIATION: Primarily to establish and maintain channels of communication with Government, Government Departments, associated industries, consumers and others at home and abroad.
Secondly to provide information to the consumers and other interested bodies.

DATE OF ORIGIN: 1926

PURPOSE OF ORIGIN: 7 or 8 pesticide manufacturers joined together to provide a united voice in discussions with the Government.

ACTIVITIES: Primary: The monitoring of changes in the U.K. and European legislation and the feeding of companies' views into the appropriate channels, particularly the Ministry of Agriculture, the Department of Industry and the Health and Safety Executive. Involvement in the initial discussions with the E.E.C. Directive on relevant legislation and with the British Government on the implementation of legislation in this country.
Secondary: Representing companies views to other associations in the pesticide industry.
Tertiary: Publications to the press regarding pesticides and to schools and colleges. Also the provision of information to the public.

WHICH WERE NOT AS IMPORTANT 10 YEARS AGO: Public relations are much more important now, therefore more information is published.

WHY: About 10 years ago there was a lot of concern about the enviroment and pesticides, particularly with respect to DDT.

ANY CHANGES IN THE AIMS OF THE ASSOCIATION IN THE LAST 10 YEARS: No

RECOGNITION OF CHANGING MEMBERSHIP NEEDS: Achieved by General Meetings and correspondence with the membership.

GARDEN COMMITTEES: Garden Products Committee produces a directory of Garden chemicals, which gives details of the products and explains the new symbols on product labels resulting from the new EEC legislation. The committee also liaises with the Ministry of Agriculture.

BUDGET: Annually between £100,000 and £500,000

PERCENTAGE SPENT ON MARKETING INFORMATION: 0.5-1.0%

PERCENTAGE SPENT ON MEMBERSHIP EDUCATION: Including correspondence and circulars, 25%

MARKET RESEARCH UNDERTAKEN: Interfirm Comparison

WILLINGNESS TO CO-OPERATE: Happy to be used to distribute ideas and mediate in discussions.

MOST SIGNIFICANT CONTRIBUTIONS TO THE INDUSTRY: A considerable contribution to the U.K.'s record of safe use of garden chemicals. This has been achieved by observance of the BAA's Code of Practice and in particular compliance with the Government's Pesticides Safety Precautions Scheme. Also by guidance to wholesalers and retailers on safe storage of garden chemicials, and guidance for the gardener and garden journalist in the form of the Directory of Garden Chemicals.

Completed by Dr. V. Kendall, Secretary to the British Agrochemicals Association.

NAME: **British Agricultural and Garden Machinery Association**

ADDRESS OF H.Q.: Church Street
Rickmansworth
Herts
WD3 1RQ

NUMBER OF MEMBERS: 947 firms (including branches) and 190 associates.

QUALIFICATIONS FOR MEMBERSHIP: Dealer holding tractor franchise with premises, workshops, skilled workers, transport, stocks of new machines and spare parts to a minimum (inspected and checked) standard.

PERCENTAGE OF POTENTIAL MEMBERSHIP WHO ARE MEMBERS: 85% of the Agricultural side.

PERCENTAGE OF MEMBERSHIP WHO ARE IN THE GARDEN INDUSTRY: 40% because agricultural members sometimes have a horticultural section.

WAYS IN WHICH THE POTENTIAL MEMBERSHIP IS UNDER-REPRESENTED: One main grouping is not in the membership.

SUBSCRIPTION FEE: Achieved by flat fee plus a fee according to turnover plus a surcharge for additional places of business (branches).

NUMBER OF ASSOCIATION STAFF: 15 full-time plus 2 part-time staff

OBJECTIVES OF THE ASSOCIATION: Primarily to encourage, promote and protect the trade.
Secondly to communicate information
Thirdly to promote or oppose legislation affecting the trade.

DATE OF ORIGIN: 1917

PURPOSE OF ORIGIN: As in above ojectives

ACTIVITIES: Primary: Liaison with Government, other organisations in agriculture (A.E.A., N.F.U.) and garden machinery (BLMF, small engine manufacturers, chainsaw committee of B.H.T.M.A).
Secondary: Education and training, Secretariat for National Joint Apprenticeship Council for the Trade.

WHICH WERE NOT AS IMPORTANT 10 YEARS AGO: Work with Westminster and Brussels (EEC)

WHY: Legislation has a major effect on the members' businesses

ANY CHANGES IN AIMS OF THE ASSOCIATION IN THE LAST 10 YEARS: Yes, due to the move away from the Industrial Training Board

RECOGNITION OF CHANGING MEMBERSHIP NEEDS: There are 15 agricultural and 6 garden machinery branches which meet at least twice a year. Also delegates on Council and committees from the membership.

GARDEN COMMITTEES: There are 6 branches of the Garden Machinery Division Committee which functions nationally. The Division controls policy subject to Council approval. There is an annual national meeting for Garden Machinery dealers.

BUDGET: Annually between £100,000 and £500,000

PERCENTAGE SPENT ON MARKET INFORMATION: A little for the publication of statistics.

MARKET RESEARCH UNDERTAKEN: Warranty, Income and Expenditure, Employment.

WHY WAS THE ABOVE MARKET RESEARCH DONE: Warranty work is often undertaken at a loss, therefore figures are needed. Income and expenditure comparisons show the cost of doing business and employment figures are needed for training and education.

WILLINGNESS TO CO-OPERATE: Yes

MOST SIGNIFICANT CONTRIBUTIONS TO THE INDUSTRY: Government and Institutional lobby and technical and legal services.

Completed by Mr Pawley, Information Officer.

NAME: **British Agricultural and Horticultural Plastics Association**

ADDRESS OF H.Q.: 5 Belgrave Square
London
SW1X 8HP

NUMBER OF MEMBERS: 46 firms plus associates

QUALIFICATIONS FOR MEMBERSHIP: Manufacturer, converter or distributor of plastic materials used in agriculture, horticulture and produce packaging and distribution.

PERCENTAGE OF POTENTIAL MEMBERSHIP WHO ARE MEMBERS: Not known

PERCENTAGE OF MEMBERS IN THE GARDEN INDUSTRY: Around 20%

WAYS IN WHICH THE POTENTIAL MEMBERSHIP IS UNDER-REPRESENTED: There could be a wider coverage of manufacturers, converters and distributors of plastics used in agriculture and horticulture, especially in the garden industry.

SUBSCRIPTION FEE: A flat fee of £50 per annum

NUMBER OF ASSOCIATION STAFF: No full-time and one part-time staff

ASSOCIATIONS WITH OTHER ORGANISATIONS: Affiliated to the British Plastics Federation at the national level and the Comite International des Plastiques en Agriculture, Paris, at international level.

OBJECTIVES OF THE ASSOCIATION: Primarily to provide a forum for the dissemination of information on developments on applications of plastics in the fields of agriculture and horticulture particularly by the means of conferences, exhibitions and by liaison with the Ministry of Agriculture and the N.F.U.
Secondly to disseminate export enquiries.

DATA OF ORIGIN: 1967

PURPOSE OF ORIGIN: To provide a forum for agricultural and horticultural plastics industries.

ACTIVITIES: Primary: To maintain a presence at B.G.L.A. a conference which each year discusses a different theme concerning the Plastics Industry. Also to organise national conferences.
Secondary: To liaise with the National Farmers Union and agricultural department in the Ministry and also with international bodies.
Thirdly: A number of publications have been produced.

ANY CHANGES IN AIMS OF THE ASSOCIATION IN THE LAST 10 YEARS: Yes, because it was felt (by the Secretary) that the developments of plastics applications in agriculture and horticulture may have largely run its course.

RECOGNITION OF CHANGING MEMBERSHIP NEEDS: Achieved through the B.A.H.P.A. Buyers Guide.

GARDEN COMMITTEES: None

BUDGET: Anually less than £10,000

MARKET RESEARCH UNDERTAKEN: None

HAS THE POSSIBILITY OF MARKET RESEARCH BEEN DISCUSSED: No

WILLINGNESS TO CO-OPERATE: This would depend upon a decision by the Executive Committee.

MOST SIGNIFICANT CONTRIBUTIONS TO THE INDUSTRY: Dissemination of information on the development of applications of plastics in the fields mentioned.

Completed by Mr. Sellers, Secretary to the British Agricultural and Horticultural Plastics Association.

NAME: **British Hardware Federation**

ADDRESS OF H.Q.: 20 Harborne Road
Edgbaston
Birmingham
B15 3AB

NUMBER OF MEMBERS: 5,000 firms and 400 associates

QUALIFICATIONS FOR MEMBERSHIP: the business must meet at least one of the following categories: Ironmonger, Builders' supplies, Plumbers' supplies, Decorators and Drysalter, Domestic hardware, China and Glassware, Electrical Supplies and Appliances, Mill Furnishings, Agricultural Supplies and Machinery, Poultry Appliances, Ship's Chandlery, Yacht and Dinghy Fittings, Fancy Goods. It must have a well-assorted stock and must provide full time employment to at least one experienced adult person in the distribution of Ironmongery or Hardware. The business should have been established for a period of 12 months.

PERCENTAGE OF POTENTIAL MEMBERSHIP WHO ARE MEMBERS: Approximately 57%

PERCENTAGE OF MEMBERSHIP WHO ARE IN THE GARDEN INDUSTRY: Probably less than 50%

WAYS IN WHICH THE POTENTIAL MEMBERSHIP IS UNDER-REPRESENTED: Do not represent the majority of D.I.Y. Homecentres.

SUBSCRIPTION FEE: Fee achieved according to the number of staff in the retail business.

NUMBER OF ASSOCIATION STAFF: 50 full-time and 15 part-time staff.

ASSOCIATIONS WITH OTHER ORGANISATIONS: Members of the Retail Consortium and National Retail trade for negotiation with Government concerning legislation. Also associated with the National Association of Tool Dealers and Building Suppliers.

OBJECTIVES OF THE ASSOCIATION: Primarily to make members more profitable and to keep them in business and running efficiently.

DATE OF ORIGIN: 1899

PURPOSE OF ORIGIN: For Trade protection

ACTIVITIES: Primary: The association undertakes many business services, the most important being the Finance company.
Secondary: The shop design service.
Tertiary: The consultancy an computeq services.
Others: The association acts as a clearance house for cheques. The association has a journal 'Hardware Today'. There is a conference programme each year.

WHICH WERE NOT AS IMPORTANT 10 YEARS AGO: None

ANY CHANGES IN AIMS OF THE ASSOCIATION IN THE LAST 10 YEARS: There is now a greater need for sales promotion activity of hardware retailers.

RECOGNITION OF CHANGING MEMBERSHIP NEEDS: Achieved by conferences and meetings at local, regional and national level. Also by the presence of specialist committees.

GARDEN COMMITTEES: None yet. Questionnaire is currently being circulated in order to find out how many members have dealings in the Garden Industry and whether a specialist committee is needed.

BUDGET: Annually in excess of £1,000,000

PERCENTAGE SPENT ON MARKET INFORMATION: Not known, but at least 4 market research jobs are done each year.

MARKET RESEARCH UNDERTAKEN: Market Research is undertaken internally as far as it is possible on important issues. If the project is beyond the capabilities of the association then an outside Market Research company is brought in. For example, the Government proposed to increase the price of paint so a complete survey of relevant stores was necessary. Internally inter-firm comparisons are done for (1) sales performance as compared to last year, (2) gross profit; average rate of increase, (3) changes in the number of staff since last year (4) wages changes, and wages as a percentage

of sales, and (5) changes in stock levels since last year. Only about 100 firms join in on the inter-firm comparisons which are called 'Today's Trading Trends' and are provided free to the members.

WHY WAS THE ABOVE TYPE OF MARKET RESEARCH DONE: With respect to the staff data, the membership asked for this information. Two other Market Research projects were done with the Hardware Alliance, involving comprehensive long range forecasts in the hardware trade but no-one used them, mainly because of apathy and partly because they only cost £2.

WILLINGNESS TO CO-OPERATE: None, the apathy that went before would probably be present again.

MOST SIGNIFICANT CONTRIBUTIONS TO THE INDUSTRY: Keeping together a strong and independent hardware association, that is independent from the multiples.

Completed by Mr R. Petitjean, Managing Director of the British Hardware Federation.

NAME: **British Lawnmower Manufacturers Association**

ADDRESS OF H.Q.: 99 Aldwych
London
WC2B 4JY

NUMBER OF MEMBERS: 13 firms and 3 associates

QUALIFICATIONS FOR MEMBERSHIP: Full members must be U.K. Lawnmower manufacturers. Associate members are U.K. Lawnmower engine manufacturers.

PERCENTAGE OF POTENIAL MEMBERSHIP WHO ARE MEMBERS: Over 90%

PERCENTAGE OF MEMBERSHIP WHO ARE IN THE GARDEN INDUSTRY: 100%

WAYS IN WHICH THE POTENTIAL MEMBERSHIP IS UNDER-REPRESENTED: No specific reasons

SUBSCRIPTION FEE: Flat fee

NUMBER OF ASSOCIATION STAFF: 2 part-time staff

ASSOCIATIONS WITH OTHER ORGANISATIONS: None

OBJECTIVES OF THE ASSOCIATION: Primarily to promote the interests of the British lawnmower industry.
Secondly to provide a channel of approach to Government and other organisations.
Thirdly to represent the industry in its relations with all organisations on matters of general importance.
Others: To provide technical information for the formulation of standards by U.K. and international organisations.

DATE OF ORIGIN: 1940

PURPOSE OF ORIGIN: To provide a means for U.K. lawnmower manufacturers to approach Government departments and others on matters of general importance.

ACTIVITIES: Primary: To carry out activities such that the above objectives can be achieved.

WHICH WERE NOT AS IMPORTANT 10 YEARS AGO: They are the same as 10 years ago.

ANY CHANGES IN AIMS OF THE ASSOCIATION IN THE LAST 10 YEARS: Only to add engine manufacturers as associate members, in order to provide additional expertise with regard to lawnmower engines.

RECOGNITION OF CHANGING MEMBERSHIP NEEDS: Achieved by regular general and technical meetings at which all members are represented.

GARDEN COMMITTEES: There is a technical committee for liaison with and input to British International standards and other organisations and general technical matters relating to the Federation members.

BUDGET: Annually less than £10,000

PERCENTAGE SPENT ON MARKET INFORMATION: Nil

PERCENTAGE SPENT ON MEMBERSHIP EDUCATION: Nil

MARKET RESEARCH UNDERTAKEN: None

HAS THE POSSIBILITY OF MARKET RESEARCH BEEN DISCUSSED: yes, no market research is undertaken because research is done by member companies.

WILLINGNESS TO CO-OPERATE: Not at present

MOST SIGNIFICANT CONTRIBUTIONS TO THE INDUSTRY: Co-operation with and technical contribution to Government and U.K. and overseas standards and other organisations.

Completed by Mr P.N. Briggs, acting Secretary to the British Lawnmower Federation.

NAME: **British Pot Plant Growers' Association**

ADDRESS OF H.Q.: c/o Tanner Farm
Goudhurst Road
Marden
Kent

NUMBER OF MEMBERS: 21 firms and 19 associates

QUALIFICATIONS FOR MEMBERSHIP: Bona-fide pot plant producers with pot plant constituting the major part of the crop turnover. The person or firm must occupy agricultural or horticultural land for the use of producing plant pots. Also applicants from England and Wales should be members of the N.F.U. of England and Wales

PERCENTAGE OF THE POTENTIAL MEMBERSHIP WHO ARE MEMBERS: 65-70% of the production area.

PERCENTAGE OF THE MEMBERSHIP WHO ARE IN THE GARDEN INDUSTRY: Most of the members are involved in bedding and patio plants.

WAYS IN WHICH THE POTENTIAL MEMBERSHIP IS UNDER-REPRESENTED: An increasing number of producers are becoming distributors as well and therefore this side of the trade could perhaps be better represented.

SUBSCRIPTION FEE: Achieved by a flat fee of £25 with an addition of £50 to the Association's Publicity Fund.

NUMBER OF ASSOCIATION STAFF: 1 part-time staff

ASSOCIATIONS WITH OTHER ORGANISATIONS: Members of the B.P.P.G.A. are also members of the N.F.U.
B.P.P.G.A. has a seat and a vote on the N.F.U.'s Glasshouse and Flowers Committee. B.P.P.G.A. are a board member of the Flowers and Plants Council.

OBJECTIVES OF THE ASSOCIATION: Primarily to protect the political, promotional and marketing position of the British plant pot industry.
Secondly to expand public awareness to houseplants, particularly, the British products.
Thirdly to inform on care and maintenance of houseplants.
Others: To provide a bilateral platform for both producers and ancillary suppliers within the British industry.

DATE OF ORIGIN: 1972

PURPOSE OF ORIGIN: To bring greater strength to what was a fragmented industry. This has largely been achieved.

ACTIVITIES: Primary: Activities which pertain to general political aspects which affect the industry e.g. energy
Secondary: Public promotions and promotional work structured in an annual program.
Tertiary: Marketing advice to members.
Others: Overseas study trips for managers, to enable them to have a closer look at a foreign market structure, this is usually done annually. To set up the Angus Valentine Memorial Award.

WHICH WERE NOT AS IMPORTANT 10 YEARS AGO: Promotional activities, overseas study and the memorial fund.

WHY: Marketing advice has become necessary because of the sharp rise of energy costs. Overseas study has become important because of the competition from abroad. The memorial fund has been started to mark the death of a prominent member.

ANY CHANGE IN AIMS OF THE ASSOCIATION IN THE LAST 10 YEARS: Possibly in the area of marketing awareness. This has probably arisen due to streamlining of businesses in order to achieve greater profitability against increasing costs.

RECOGNITION OF CHANGING MEMBERSHIP NEEDS: Achieved by weekly contact by 'phone plus monthly meetings and special seminars.

BUDGET: Annually less than £10,000

PERCENTAGE SPENT ON MARKET INFORMATION: 16%

PERCENTAGE SPENT ON MEMBERSHIP EDUCATION: 84%

MARKET RESEARCH UNDERTAKEN: Market research is done to describe product availability and the value of costs of modification. A one-off study has also been done which was shared with the Flowers and Plants Council. It was an attitudinal survey and was carried out in 1976.

WHY WAS THE ABOVE TYPE OF MARKET RESEARCH DONE: It is what the membership in general agreed would produce results of use to them.

WILLINGNESS TO CO-OPERATE: Possibly

MOST SIGNIFICANT CONTRIBUTIONS TO THE INDUSTRY: Greater awareness of British Production. Also the drawing together of British producers into one specialist organisation.

Completed by Mrs L. Mannington, Secretary/Press Officer to the British Pot Plant Growers Association.

It should be noted that the following entry is not copied from a completed questionnaire since the Federation of British Hand Tool Manufacturers were unwilling to provide the depth of information sought. The entry has, therefore, been compiled from the Federation's handbook ('Who we are, what we do . . . and why you should join'), the Federation's Annual Report 1980, a letter addressed to the author from the Secretary concerning the questionnaire and information from CBD Research Limited.

NAME: **Federation of British Hand Tool Manufacturers**

ADDRESS OF H.Q.: Light Trades House
Melbourne Avenue
Sheffield
S10 2QJ

NUMBER OF MEMBERS: (1981 figure) 96 full members and 8 associate members.

QUALIFICATIONS FOR MEMBERSHIP: Full membership is open to U.K. manufagturers of hand tools and certain allied products. Associate membership may be granted in exceptional cases to those whose activities are directly concerned with the Hand Tool Industry.

PERCENTAGE OF THE MEMBERSHIP WHO ARE IN THE GARDEN INDUSTRY: Approximately 8%

ASSOCIATIONS WITH OTHER ORGANISATIONS: The Federation is made up of 6 associations, the Engineers' Hand Tools Association, the File Association, the Horticultural and Contractors' Tool Association, the Saw Association, the Woodworkers' Builders' and Miscellaneous Tools Association, and the Powder Actuated Systems Association. The Federation co-operates with the C.B.I. on industrial trend information. Federation representatives are present on the B.S.I. Committees, on the Hardware Manufacturers Association Council and on the joint liaison committee with the F.B.E.T.M. (engineers) and the Department of Industry.

OBJECTIVES OF THE ASSOCIATION: Primarily to represent the views of the Hand Tool Industry to the Government, and to help determine Government and EEC policies affecting the industry's current and future operations.

DATE OF ORIGIN: 1944

ACTIVITIES: Primary: Representation to the Government by liaison with the Department of Industry and to the EEC by liaison with the Comite European de l'Outillage (which speaks for the European Hand Tool industry as a whole).
Secondary: To provide a forum where exporters can exchange information and where the Federation can help members find out if they are eligible for government subsidies on export activities.
Tertiary: Activities which lead to the improvement of product standards by liaison with the B.S.I. Members are consulted about proposals for standards affecting their tools.
Fourthly: To provide members with cheaper stands at the Spring Fair.
Fifthly: To produce a monthly bulletin of general information. Typical subjects covered include export activities, the effects of government legislation and reports of meetings of the Executive Council.

MARKET RESEARCH UNDERTAKEN: In conjunction with the C.B.I. industrial trends information is obtained. Import and export statistics are obtained for the UK, France, Germany, Japan, Sweden and the USA. Quarterly sales statistics are received from firms employing more than 75 persons, and this information is published in Business Monitor PQ 391. The Federation also provides up-to-date information on import penetration of the home market by-products. Some years ago a number of tool manufacturers combined in a retail audit scheme but this was abandoned when the cost became prohibitive.

WILLINGNESS TO CO-OPERATE: Should any proposal for combined research be put forward which would indicate the likely interest of tool manufacturers, then the Federation may be able to discuss it with their members.

Correspondence was from B.J. Machen, Secretary to the Federation of British Hand Tool Manufacturers.

NAME: **Federation of Garden and Leisure Equipment Exporters (GARDENEX)**

ADDRESS OF H.Q.: 96 Church Street
Great Bedwyn
Wiltshire
SN8 3PF.

NUMBER OF MEMBERS: 71 firms

QUALIFICATIONS FOR MEMBERSHIP: Exporters of British manufactured products for garden and horticultural use, seedsmen of growers produce and producers of plants and bulbs.

PERCENTAGE OF THE POTENTIAL MEMBERSHIP WHO ARE MEMBERS: Not known

PERCENTAGE OF THE MEMBERSHIP WHO ARE IN THE GARDEN INDUSTRY: 100%

WAYS IN WHICH THE POTENTIAL MEMBERSHIP IS UNDER-REPRESENTED: A tendency to service the smaller company. The large organisations rely on their own export expertise. There is also a smaller number of members from the fertiliser and chemical industries and from the lawnmower industry.

SUBSCRIPTION FEE: Trade journals pay on a flat fee basis. Others pay according to their turnover.

NUMBER OF ASSOCIATION STAFF: 3 part-time (but shared) staff

ASSOCIATIONS WITH OTHER ORGANISATIONS: The Hardware Manufacturers Association is an affiliated member.

OBJECTIVES OF THE ASSOCIATION: Primary; To promote the export of British garden products to all parts of the world.
Secondary: To assist members to increase their share of the export market.

DATE OF ORIGIN: 1962 (Formally the Federation of British Horticultural Exporters).

PURPOSE OF ORIGIN: As stated in the objectives

ACTIVITIES: Primary: To provide 'hot-line' advice on export problems.
Secondary: To undertake joint ventures sponsored by Government to overseas Trade Fairs.
Tertiary: Inward and outward Trade missions with the aid of the British Overseas Trade Board. These are to locate the really important buyers.
Other: GARDENEX mini exhibitions, the newsletter and Market Research. Joint publicity is also carried out. Directory of members' products is sent to embassies.

WHICH WERE NOT AS IMPORTANT 10 YEARS AGO: All were as important

ANY CHANGES IN AIMS OF THE ASSOCIATION IN THE LAST 10 YEARS: None

RECOGNITION OF CHANGING MEMBERSHIP NEEDS: By telephone conversations and meeting with the members.

GARDEN COMMITTEES: None

BUDGET: Annually between £10,000 and £50,000

PERCENTAGE SPENT ON MARKET INFORMATION: 15%

PERCENTAGE SPENT ON MEMBERSHIP EDUCATION: 15%

MARKET RESEARCH UNDERTAKEN: Market information is gathered concerning the legislation, the politics and the economic situation of foreign countries using Government papers, newsletters from trade associations etc. This has been done for Japan, Europe, France, Germany, Netherlands, Belgium. The type of information obtained include types of marketing outlet, consumer patterns, national characteristics of gardening, types of products sold, market structure and other foreign manufacturers exports.

WHY WAS THE ABOVE TYPE OF MARKET RESEARCH UNDERTAKEN: Consultation between the members and the Council

WILLINGNESS TO CO-OPERATE: May be interested depending on the slant towards or away from foreign markets.

MOST SIGNIFICANT CONTRIBUTIONS TO THE INDUSTRY: The encouragement of small companies to start exporting.

Completed by Yvonne Slade, Secretary to the Federation of Garden and Leisure Equipment Exporters.

NAME: **The Fertiliser Manufacturers Association Limited**

ADDRESS OF H.Q.: Greenhill House
90-93 Cowcross Street
London
EC1M 6BH

NUMBER OF MEMBERS: 32 firms

QUALIFICATION FOR MEMBERSHIP: Manufacturers of fertilisers

PERCENTAGE OF THE POTENTIAL MEMBERSHIP WHO ARE MEMBERS: 98% of the potential production

PERCENTAGE OF THE MEMBERSHIP WHO ARE IN THE GARDEN INDUSTRY: 50%

SUBSCRIPTION FEE: Levy per product tonne

NUMBER OF ASSOCIATION STAFF: 5 full-time and 2 part-time staff

ASSOCIATIONS WITH OTHER ORGANISATIONS: Associated with various organisations

OBJECTIVES OF THE ASSOCIATION: Primarily to act as a trade association of manufacturers of fertilisers, to promote their common interests, to endeavour to settle their common problems, to represent them and, in particular, to facilitate sales and increase the consumption of fertilisers. Representation is on a national scale, on a European scale through the EEC and on an international scale through UNIDE, FAD, UNCTAD.

DATE OF ORIGIN: 1875

PURPOSE OF ORIGIN: As above, in the objectives of the association.

ACTIVITIES: Production of literature on regulations, storage, the environment and fertilisers.

GARDEN COMMITTEES: A small packs committee

MARKET RESEARCH UNDERTAKEN: Average application rates based on members sales and Ministry figures.

HAS THE POSSIBILITY OF A MARKET RESEARCH BEEN DISCUSSED: Yes

WILLINGNESS TO CO-OPERATE: Not willing to co-operate

Completed by Mr. H.S.S. Few, Director General of the Fertiliser Manufacturers Association Limited

NAME: **Garden Industry Manufacturers' Association**

ADDRESS OF H.Q.: 18 Westcote Road
Reading
Berkshire
RG3 2DE

NUMBER OF MEMBERS: 77 firms

QUALIFICATIONS FOR MEMBRSHIP: British Manufacturers of products (not plants) for sale to a Gardening Outlet and sole distributors of imported goods. Manufacturing must be on a 'substantial' scale and the manufacturers of these products must have been going on for a stated amount of time prior to application for membership.

PERCENTAGE OF THE POTENTIAL MEMBERSHIP WHO ARE MEMBERS: Probably less than 20%

PERCENTAGE OF THE MEMBERSHIP WHO ARE IN THE GARDEN INDUSTRY: 100%

WAYS IN WHICH THE POTENTIAL MEMBERSHIP IS UNDER-REPRESENTED: The potential membership consists of a few large firms and many small firms. G.I.M.A. has roughly equal proportions of each and therefore the large, small-firms sector is under-represented. Not included at present are lawn-mower and greenhouse manufacturers and only a few tool and furniture manufacturers. All these sectors have their own separate associations.

SUBSCRIPTION FEE: By turnover

NUMBER OF ASSOCIATION STAFF: 1 full-time staff

ASSOCIATIONS WITH OTHER ORGANISATIONS: Associate members of the H.T.A. Regular meetings with the I.G.C. and the W.H.A.

OBJECTIVES OF THE ASSOCIATION: Primarily to provide a forum for manufacturers of Garden products to meet to discuss their mutual interests, and to represent their views to other bodies both within and outside the Industry.
Secondly to undertake projects which will lead to the increased efficiency of individual businesses e.g. discount analysis, Trade show questionniares, Market Research project.
Thirdly to discuss the cost, to individual members, of Trade shows and trade catalogues and to increase their effectiveness.

DATE OF ORIGIN: 1977/1978

PURPOSE OF ORIGIN: To enable manufacturers to unite and discuss their unique problems (as opposed to manufacturer and wholesaler groups together).

ACTIVITIES: Primary: Regional meetings, conference and social meetings.
Secondary: G.I.M.A. exhibition and joint GLEE venture.
Tertiary: Credit control scheme.
Others: Market Research project and promotional projects.

WHICH WERE NOT AS IMPORTANT 10 YEARS AGO: Credit control and promotion, because it has taken some time to prepare what is needed.

ANY CHANGES IN THE AIMS OF THE ASSOCIATION SINCE ORIGIN: None

RECOGNITION OF CHANGING MEMBERSHIP NEEDS: Regular meetings, in particular the Regional meetings.

BUDGET: Annually between £10,000 and £50,000

PERCENTAGE SPENT ON MARKET INFORMATION: Nil

PERCENTAGE SPENT ON MEMBERSHIP EDUCATION: Nil

MARKET RESEARCH UNDERTAKEN: None

HAS THE POSSIBILITY OF MARKET RESEARCH BEEN DISCUSSED: yes, as yet no Market Research has been undertaken because the cost has been too high.

WILLINGNESS TO CO-OPERATE: Yes

MOST SIGNIFICANT CONTRIBUTIONS TO THE INDUSTRY: To bring together manufacturers in a very fragmented Industry.

Completed by Mr E. Ward, President to the Garden Industry Manufacturers' Association.

NAME: **Horticultural Trades Association**

ADDRESS OF H.Q.: 18 Westcote Road
Reading
Berkshire
RG3 2DE

NUMBER OF MEMBERS: 1314 firms

QUALIFICATIONS FOR MEMBERSHIP: Firms or individuals must be engaged as:
(a) Nurserymen or Seedsmen; Growers, Wholesalers or Retailers
(b) Garden Centre Operators
(c) Retail Horticultural Shopkeepers
(d) Manufacturers and Suppliers of Horticultural

products and services
(e) Wholesale Horticultural Sundriesmen

PERCENTAGE OF POTENTIAL MEMBERSHIP WHO ARE MEMBERS: 33%

PERCENTAGE OF THE MEMBERSHIP WHO ARE IN THE GARDEN INDUSTRY: 100%

WAYS IN WHICH THE POTENTIAL MEMBERSHIP IS UNDER-REPRESENTED: The small specialist outlet is under-represented

SUBSCRIPTION FEE: By turnover

NUMBER OF ASSOCIATION STAFF: 9 full-time and 3 part-time staff

ASSOCIATIONS WITH OTHER ORGANISATIONS: Members of the C.B.I., N.F.U., the National Chamber of Trade and the Reading Chamber of Commerce.

OBJECTIVES OF THE ASSOCIATION: Primarily to promote and protect the interests of the Horticultural Industry and all persons engaged in that or any allied trade, particularly by representation to Government.
Secondly to provide a range of commerical services, including the distribution of information, research and education.
Thirdly to provide a meeting place for persons in the Horticultural Industry.

DATE OF ORIGIN: 1898

PURPOSE OF ORIGIN: To look after the interests of nurserymen particularly with respect to improved conditions of transport of nursery stock and representation to Government.

ACTIVITIES: Primary: The Gift Token Scheme. This has a turnover of over £1 million a year.
Secondary: The organisation of Branch meetings and the Annual General Meeting.
Tertiary: The provision of the numerous products and services.

WHICH WERE NOT AS IMPORTANT 10 YEARS AGO: The commercial activities are of greater importance.

ANY CHANGES IN AIMS OF THE ASSOCIATION IN THE LAST 10 YEARS: Development of the commerical activities and increased importance in the need to justify the existence of the association.

RECOGNITION OF CHANGING MEMBERSHIP NEEDS: Branch feedback and committee meetings.

GARDEN COMMITTEES: Retail stock, nursery stock committees.

BUDGET: Annually between £100,000 and £500,000

PERCENTAGE SPENT ON MARKET INFORMATION: Nil

PERCENTAGE SPENT ON MEMBERSHIP EDUCATION: Approximately 1%

MARKET RESEARCH UNDERTAKEN: Have previously undertaken a wages survey for managers. The association is presently discussing interfirm comparisons of sales performance and staff costs.

WHY WAS THE ABOVE TYPE OF MARKET RESEARCH DONE: The Retail Committee decided the information would be useful.

WILLINGNESS TO CO-OPERATE: Yes, in principle.

MOST SIGNIFICANT CONTRIBUTIONS TO THE INDUSTRY: The Gift Token Scheme, 1 and 2 day seminars on merchandising and discussions with the Government regarding plant health.

Completed by Mr. A. Strickland, Director General to the Horticultural Trade Association.

NAME: **International Garden Centre (British Group) Limited**

ADDRESS OF H.Q.: 18 Westcote Road
Reading
Berkshire
RG3 2DE

NUMBER OF MEMBERS: 135 Garden Centres and 130 associate members

QUALIFICATION FOR MEMBERSHIP: Garden Centres must be of a particular size, over 500 sq.meters of plant area and over 100 sq.meters of covered area. The centre must also offer a comprehensive range of good quality garden plants and a wide range of garden equipment and sundries. Associate members are suppliers to the Garden Centres.

PERCENTAGE OF POTENTIAL MEMBERSHIP WHO ARE MEMBERS: 60%

PERCENTAGE OF THE MEMBERSHIP WHO ARE IN THE GARDEN INDUSTRY: 100%

WAYS IN WHICH THE POTENTIAL MEMBERSHIP IS UNDER-REPRESENTED: None

SUBSCRIPTION FEE: Flat fee for the full members of £275 each and £110 for associates

NUMBER OF ASSOCIATION STAFF: 1 full-time and 3 part-time staff

ASSOCIATIONS WITH OTHER ORGANISATIONS: The association is part of the International Garden Centre Group in Spain. It also has close links with the H.T.A. with all members of the Association being compulsory members of the H.T.A.

OBJECTIVES OF THE ASSOCIATION: Primarily to provide training facilities, special purchasing opportunities, financial information and I.G.C. promotion.
Secondly to represent the interests of its members to Government, for example, about the Sunday Trading Bill.

DATE OF ORIGIN: 1968

PURPOSE OF ORIGIN: Maintain and improve the standards in the Garden Centre operations.

ACTIVITIES: Primary: To provide a forum for similar types of businesses.
Secondary: The distribution of the Newsletter, organisation of seminars and conferences.
Tertiary: Distribution of special point-of-sale material.

WHICH WERE NOT AS IMPORTANT 10 YEARS AGO: The provision of commercial services is now more important.

ANY CHANGES IN AIMS OF THE ASSOCIATION IN THE LAST 10 YEARS: None

RECOGNITION OF CHANGING MEMBERSHIP NEEDS: By local and group meetings plus one delegate from each area (there are 7 of them) sits on the national committee.

GARDEN COMMITTEES: None

BUDGET: Anually between £50,000 and £100,000

PERCENTAGE SPENT ON MARKET INFORMATION: 4%

PERCENTAGE SPENT ON MEMBERSHIP EDUCATION: 2%

MARKET RESEARCH UNDERTAKEN: An interfirm comparison and a barometer of trade. 27 firms take part in the interfirm comparison. It comprises wages and profit as a % of turnover and the barometer of trade comprises a monthly turnover check.

WHY WAS THE ABOVE TYPE OF MARKET RESEARCH DONE: It provides basic information about the Garden Centre business.

WILLINGNESS TO CO-OPERATE: Yes, in principle, but individual members must be pursuaded to do something positive.

MOST SIGNIFICANT CONTRIBUTIONS TO THE INDUSTRY: Raising the standards of retailers in the Garden Industry.

Completed by Mr D. Nickel, Secretary to the International Garden Centre (British Group) Limited.

NAME: **John Innes Manufacturers Association**

ADDRESS OF H.Q.: 18 Westcote Road
Reading
Berkshire
RG3 2DE

NUMBER OF MEMBERS: 26 firms

QUALIFICATIONS FOR MEMBERSHIP: Established manufacturers of John Innes Compost, subject to satisfactory inspection report from an independent consultant on the materials, production methods and quality control systems used to ensure a satisfactory quality compost.

PERCENTAGE OF POTENTIAL MEMBERSHIP WHO ARE MEMBERS: Over 80%

PERCENTAGE OF THE MEMBERSHIP WHO ARE IN THE GARDEN INDUSTRY: 100%

WAYS IN WHICH THE POTENTIAL MEMBERSHIP IS UNDER-REPRESENTED: A few of the smaller local manufacturers of J.I. compost have not yet joined the Association but we have recently begun an active campaign to recruit them.

SUBSCRIPTION FEE: A flat fee of £110 plus £11 per 1000 tonnes

NUMBER OF ASSOCIATION STAFF: 2 part-time staff, a secretary and a consultant

ASSOCIATIONS WITH OTHER ORGANISATIONS: J.I.M.A. is associated with, but at the present time is not officially part of, the H.T.A.. J.I.M.A. members do not have to be members of the H.T.A., although in practice many of them are.

OBJECTIVE OF THE ASSOCIATION: Primarily to uphold the standards of quality which have given John Innes compost its popularity and repeated recommendations for a wide range of plant species.
Secondly to promote the merits of J.I. compost to the trade and to the general public.
Thirdly to arrange a technical consultancy so as to advise members and consumers on any problems or queries that may arise.
Others: To represent the interests of members in dealing with external matters such as legislation etc.

DATE OF ORIGIN: 1976/77

PURPOSE OF ORIGIN: As above.

ACTIVITIES: Primary: Advertising and public relations activities to promote J.I. compost.
Secondary: Raising standards of quality of J.I. compost where necessary.
Tertiary: Arranging meetings for members to discuss the above points and others of common interest.

ANY CHANGES IN AIMS IN THE LAST 10 YEARS: Only slight change of emphasis due to the fact that originally the Association had to promote its existence and explain the significance of the Seal of Approval. Now the object is more to raise the standards of quality and hence to improve profitability for the Industry.

RECOGNITION OF CHANGING MEMBERSHIP NEEDS: Regular quarterly meetings of all members, plus regional meetings at least once a year to discuss local topics.

GARDEN COMMITTEES: An advertising and PR committee and a Quality control committee.

BUDGET: Annually less than £10,000

PERCENTAGE SPENT ON MARKET INFORMATION: Not measurable

PERCENTAGE SPENT ON MEMBERSHIP EDUCATION: Less than 5%

MARKET RESEARCH UNDERTAKEN: None

HAS THE POSSIBILITY OF MARKET RESEARCH BEEN DISCUSSED: Yes

WHY WAS THE PROJECT NOT UNDERTAKEN: Cost, and the conflicting interests of very large and very small members in the industry

WILLINGNESS TO CO-OPERATE: Yes

MOST SIGNIFICANT CONTRIBUTIONS TO THE INDUSTRY: The introduction and publication of the 'Seal of Approval' for JI composts which has served to greatly reduce the number of poor quality composts in the market.

Completed by Mr B. Dunsby, Chairman of the John Innes Manufacturers Association.

NAME: **Leisure and Outdoor Furniture Association**

ADDRESS OF H.Q.: 60 Claremont Road,
Surbiton
Surrey

NUMBER OF MEMBERS: 40-50 firms

QUALIFICATION FOR MEMBERSHIP: Manufacturers of Garden or outdoor furniture in the United Kingdom or importers and wholesalers who sell from stock and who are acceptable to the membership.

PERCENTAGE OF THE POTENTIAL MEMBERSHIP WHO ARE MEMBERS: 70% One or two quite large manufacturers are still not members.

PERCENTAGE OF THE MEMBERSHIP WHO ARE IN THE GARDEN INDUSTRY: All are to some extent. Between 60% and 70% of the production capacity lies within the membership.

WAYS IN WHICH THE POTENTIAL MEMBERSHIP IS UNDER-REPRESENTED: Those manufacturers who sell direct to the public are generally not members of L.O.F.A. because one of the main reasons for joining is to take advantage of the facility to exhibit to the trade.

SUBSCRIPTION FEE: Flat fee, which varies from year to year.

NUMBER OF ASSOCIATION STAFF: 4 full-time staff shared with other associations

ASSOCIATIONS WITH OTHER ORGANISATIONS: Members of the Hardware Manufacturers Associations and represented on the Hardware Council (runs the Spring Fair) and on International Garden promotions (runs GLEE).

OBJECTIVES OF THE ASSOCIATION: Primarily to promote the market for outdoor and leisure furniture by means of exhibitions and public relations.
Secondly to look after the interests of the membership with respect to legislation and other factors which affect them.

DATE OF ORIGIN: 1966

PURPOSE OF ORIGIN: Primarily to establish an exhibition for Garden Furniture.

ACTIVITIES: Primary: Promotion of the market through the encouragement of suitable trade fairs for example GLEE and Spring Fair, and SPGA and GARTEN.
Secondary: Representation to Government.

ANY CHANGES IN AIMS OF THE ASSOCIATION IN THE LAST 10 YEARS: Not a great deal, any changes have been due to different Governments who have changed the legislation relevant to the membership.

RECOGNITION OF CHANGING MEMBERSHIP NEEDS: Through the annual general meeting and round-table meetings which are held each quarter.

GARDEN COMMITTEES: The Association does not distinguish between garden and other furniture.

BUDGET: Annually between £10,000 and £50,000

PERCENTAGE SPENT ON MARKET INFORMATION: Very little, less than 1%

PERCENTAGE SPENT ON MEMBERSHIP EDUCATION: Nil

MARKET RESEARCH UNDERTAKEN: An interfirm comparison has been done and failed for two reasons. Firstly, the classification had too many categories, that is to say, too many questions were being asked and secondly, the co-operators lost interest.

HAS THE POSSIBILITY OF MARKET RESEARCH BEEN DISCUSSED: yes, the possibility of visiting members and finding out their turnovers, sales, products and trends in the business has been discussed.

WILLINGNESS TO CO-OPERATE: Possibly

MOST SIGNIFICANT CONTRIBUTIONS TO THE INDUSTRY: Setting up the L.O.F.A. exhibition which has now become GLEE.

Completed by Mr. Walker, Secreatry to the Leisure and Outdoor Furniture Association.

NAME: **United Kingdom Agricultural Supply Trade Association's Consumer Packet Seed Committee**

ADDRESS OF H.Q.: 3 Whitehall Court
London
SW1A 2EQ

NUMBER OF MEMBERS: 11 firms

QUALIFICATIONS FOR MEMBERSHIP: Firms producing and distributing packet seeds in the U.K. to the Garden Market.

PERCENTAGE OF THE POTENTIAL MEMBERSHIP WHO ARE MEMBERS: 80%

PERCENTAGE OF THE MEMBERSHIP WHO ARE IN THE GARDEN INDUSTRY: 100%

WAYS IN WHICH THE POTENTIAL MEMBERSHIP IS UNDER-REPRESENTED: Two major seed companies are not currently members of the committee.

SUBSCRIPTION FEE: By turnover

NUMBER OF ASSOCIATION STAFF: 2 full-time staff

ASSOCIATIONS WITH OTHER ORGANISATIONS: The Committee is only one of U.K.A.S.T.A.'s Standing Committees, it therefore draws on all U.K.A.S.T.A.'s services.

OBJECTIVES OF THE COMMITTEE: Primarily to produce publicity to increase the overall use of packet seeds in the U.K.
Secondly to monitor Government legislation as it affects marketing of packet seeds in the U.K.
Thirdly to undertake joint Market Research on the packet seeds industry as a whole.
Others: Trade seminars and Trade Public Relations.

DATE OF ORIGIN: October 1981

PURPOSE OF ORIGIN: To achieve the above objectives

ACTIVITIES: As above

ANY CHANGES IN THE AIMS OF THE COMMITTEE SINCE ITS ORIGIN: Yes, due to EEC legislation and market changes in distribution, products and volume.

RECOGNITION OF CHANGING MEMBERSHIP NEEDS: By regular meetings

GARDEN COMMITTEES: Just this one within U.K.A.S.T.A.

BUDGET: Annually less than £10,000

PERCENTAGE SPENT ON MARKET INFORMATION: Nil

MARKET RESEARCH UNDERTAKEN: None at present

HAS THE POSSIBILITY OF MARKET RESEARCH BEEN DISCUSSED: Yes, it has been proposed that packet seed companies will feed volume and RSP figures to a neutral source to ascertain market size. This has not been undertaken yet because of the sale or return aspects of the Trade which makes the estimates of volume sales very difficult to ascertain.

WILLINGNESS TO CO-OPERATE: Yes

MOST SIGNIFICANT CONTRIBUTIONS TO THE INDUSTRY: Too early to say. Anticipate that the Committee's Public Relations will improve the high standing image in the U.K. packet seed trade.

Completed by Innes Mathieson, Secretary to the United Kingdom Agricultural Supply Trade Association's Consumer Packet Seed Committee.

NAME: **Wholesale Horticultural Association**

ADDRESS OF H.Q.: c/o Spread Garden Supplies Limited
Edward Street
Sutton
St. Helens
Merseyside

NUMBER OF MEMBERS: 25 firms

QUALIFICATIONS FOR MEMBERSHIP: Membership of the Association shall be confined to Persons, Firms or bodies corporate who in the opinion of the Executive Council are bona-fide Wholesale Distributors of one or more of the following, Horticultural Sundries, Insecticides, Fungicides and Fertilisers, for distribution through the retail trade to the public.

PERCENTAGE OF THE POTENTIAL MEMBERSHIP WHO ARE MEMBERS: Uncertain, maybe 25%

PERCENTAGE OF THE MEMBERSHIP WHO ARE IN THE GARDEN INDUSTRY: 100%

WAYS IN WHICH THE POTENTIAL MEMBERSHIP IS UNDER-REPRESENTED: Horticultural Sundries are handled by Hardware, Petfood, Paint, Grocery and other wholesalers as secondary ranges of products and in very various depths of range. Without individual investigation it is difficult to ascertain the eligibility of individual firms for membership.

SUBSCRIPTION FEE: Flat fee

NUMBER OF ASSOCIATION STAFF: 1 part-time staff.

ASSOCIATIONS WITH OTHER ORGANISATIONS: Affiliated to the F.W.I.D.

OBJECTIVES OF THE ASSOCIATION: Primarily to protect and further the mutual trade interests of the members, to promote the sales of horticultural products through the retail trade selling to the amateur grower, to promote closer co-operation between and interchange information amongst the members.
Secondly to support the retail trade for the better distribution of horticultural sundries.
Thirdly to collect and circulate statistics of general interest to the trade.
Others: To support members in disputes and to consider relevant legislation.

DATE OF ORIGIN: Around 1960

PURPOSE OF ORIGIN: To safeguard the interests of the horticultural wholesaler members.

ACTIVITIES: Primary: Campaigning to persuade manufacturers to recognise the function of a wholesale distributor and supply him at terms showing at least 12.5% more than retail level.
Secondary: Committee meetings.
Tertiary: Delegates meetings with delegates from G.I.M.A. and I.G.C.A.

WHICH WERE NOT AS IMPORTANT 10 YEARS AGO: Campaigning to the manufacturers, because in the last 10 years the multiple discount houses have grown tremendously.

ANY CHANGES IN AIMS OF THE ASSOCIATION IN THE LAST 10 YEARS: Yes, because of the above.

RECOGNITION OF CHANGING MEMBERSHIP NEEDS: By committee meetings.

GARDEN COMMITTEE: None

BUDGET: Annually less than £10,000

MARKET RESEARCH UNDERTAKEN: Individual member firms carry out their own research exercises necessary for them to run their businesses.

HAS THE POSSIBILITY OF MARKET RESEARCH BEEN DISCUSSED: Yes the W.H.A. and G.I.M.A. are discussing joint Market Research.

WILLINGNESS TO CO-OPERATE: Yes

MOST SIGNIFICANT CONTRIBUTIONS TO THE INDUSTRY: To bring wholesalers together to form a united front.

Completed by Mr F. Foster, Chairman to the Wholesale Horticultural Association.

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