

The Gallup Organization, Inc.

PRINCETON, NEW JERSEY

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Roses, Inc.

Haslett, Michigan

Membership Study

February 1991

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AHLSTRAND 91

SECTION I
EXECUTIVE SUMMARY

Introduction

Roses, Inc. commissioned The Gallup Organization, Inc. of Princeton, New Jersey to conduct a member research project. The purpose of this study was to determine the attitudes and opinions of grower members toward the organization and its activities and benefits. This executive summary is designed to highlight key findings of this research project. Additional, more in-depth detail can be found in the accompanying narrative report, as well as in the tabular results.

Methodology

Telephone interviews were conducted with 150 grower members of Roses, Inc. during January and February 1991.

Major Findings:

Why did grower members originally join Roses, Inc. and why do they maintain their membership?

Members initially joined Roses, Inc. primarily for the information they derived from the organization. Almost all of their top-of-mind answers as to why they originally joined revolved around receiving some type of information from the organization. A different focus, however, takes place with regard to members' responses as to why they maintain their membership. Members were much more likely to cite research and the exchange of ideas with other growers as reasons why they maintain their membership than they were to cite these reasons for initially joining. It appears as if the Roses, Inc. members go through a "growth phase" with regard to their membership. Initially they joined to learn more

about the industry they are in and obtain basic levels of knowledge, but as they maintain their membership, they learn to "appreciate" more in-depth types of research and the contact opportunities that the organization provides.

Which services and benefits that Roses, Inc. provide are most important to its members?

Of all the various services and benefits tested in this study, those that were consistently rated highest in importance by the members were research sponsored by Roses, Inc., the Rose Manual, Roses, Inc. educational meetings, representation in the Roses, Inc. industry and regulatory matters, and Roses, Inc. Bulletin. Clearly, of all these benefits, the members are most "impressed" by research sponsored by Roses, Inc. Not only did research receive a significantly higher mean importance rating than all other services and benefits tested (4.34 on a 5.00 scale), but when members were limited to selecting the most important service or benefit provided by the organization, 32% named research as the top benefit. Educational meetings - 19% mention, was the only other service or benefit that received more than 12% mention. Further validation of the importance of research was generated when it was compared to the work of the Import Action Committee. Only 21% of the members believed the work of the Import Action Committee was more important than research, while 45% believed the Import Action Committee work was less important than the research work done by Roses, Inc.

Among the various types of research that Roses, Inc. could/does conduct, those that received highest importance ratings

included insect control (79% very important), disease control (77%), nutrition (75%), and mildew control (74%).

How satisfied are Roses, Inc. members with their membership?

The great majority (89%) of the members said they were either very satisfied (49%) or somewhat satisfied (40%) with their current Roses, Inc. membership. Only one percent (1%) of the membership said they were very dissatisfied with their membership. Canadian members and smaller growers (in terms of number of plants they grow) tended to have higher levels of satisfaction with Roses, Inc. than did members from California or larger growers.

In similar fashion, approximately nine-tenths (89%) of the members rated their membership dues from Roses, Inc. as either very reasonable (35%) or somewhat reasonable (54%). These numbers are extremely high for a membership group given the fact that one of the first areas that membership groups tend to complain about is the cost of being a member. Only three percent (3%) felt their current dues were very unreasonable. Again, members living outside the state of California and smaller growers tended to believe their dues were more reasonable than their counterparts in California or larger members.

Among potential services or benefits that Roses, Inc. could provide, which ones have the greatest appeal for its members?

Seven different potential services were tested with the grower members. Among these, three received what could be called moderately high to high levels of appeal from the respondents. They include: greenhouse tour trips (3.81); a research-only

"bulletin" published quarterly (3.76); and, access to a professional rose production consultant for advice on rose growing to include insect and disease control (3.73). All three of these services received high levels of appeal ratings from at least six-tenths of the members. In general, smaller growers tended to rate all of the prospective new services as having higher appeal than did their larger grower counterparts.

What activities should Roses, Inc. be involved in?

Table A below shows a list of aided activities that members were asked about. The table illustrates the percent of members who believe Roses, Inc. should be actively involved in each of the following activities.

TABLE A
Activities Roses, Inc. Should be Involved In
(n=150)

<u>Activity</u>	<u>% "yes"</u>
Educating retailers about the care and handling of roses	94%
Monitoring the effect of government regulations on growers	90
Paid consumer advertising of roses	55
National labeling of U.S. grown roses	65
Working with wire services	75
Fighting unfair practices by overseas growers	75
Our own public relations department within Roses, Inc.	75
Establishing grades and standards for roses	74
Paid advertising in the florist trade press	56
Sponsoring designers or commentators at florist design schools	54
Assist grower members in brand identification of their own roses	49
National marketing order for roses	47

How do members stand with regard to various issues currently being faced by Roses, Inc.?

Table B below is a summary table of some of the various issues that were tested with the members.

TABLE B
Summary Table
(n=150)

Have you ever served on a Roses, Inc. board or committee?

Yes	39%
No	61

The Floral Trade Council is a separate organization from Roses, Inc. and now represents all types of fresh flowers, including roses in matters of international trade. Their work is monitored by the Roses, Inc. Import Action Committee. Do you feel that the Floral Trade Council adequately represents you in this area?

Yes	63%
No	23
Don't know	13
Refused	1

Should Roses, Inc. Import Action Committee continue to only monitor this work or should it be more involved and carry on a separate program of its own?

Monitor work	64%
Involved in carry on a separate program of its own	21
Don't know	11
Refused	4

Should Roses, Inc. have a government affairs type committee through which federal regulation is monitored and explained to members when enacted, and which would represent the rose growers position on such legislation as is being considered by the government?

Yes	67%
No	25
Don't know	6
Refused	2

TABLE B (continued)
Summary Table
(n=150)

Starting in 1990, the Roses, Inc. board began a test of having only one spring meeting, rather than the earlier plan of one in the East Region and one in the West Region. This eliminated one educational meeting, rose display and tour set-up. Do you favor or oppose having only one spring meeting?

Favor	78%
Oppose	15
Don't know	6
Refused	1

Have you donated to the Joseph H. Hill Memorial Foundation in order to support research?

Yes	77%
No	20
Don't know	3

Would you say the paid staff at the Haslett office is doing an excellent, good, fair or poor job?

Excellent	32%
Good	45
Fair	19
Poor	2
Don't know	2

Do you favor or oppose maintaining the current board of governor structure of Roses, Inc., which has a large board meeting twice a year and places a high degree of responsibility on the paid staff?

Favor	79%
Oppose	12
Don't know	6
Refused	3

TABLE B (continued)
Summary Table
(n=150)

Roses, Inc. currently has an East and West region, with each having equal representation on the board. Do you think the regional representation is a fair method of representing the membership?

Yes	80%
No	17
Don't know	3

SECTION II
INTRODUCTION AND METHODOLOGY

Introduction

The Gallup Organization, Inc. of Princeton, New Jersey conducted a market research project for Roses, Inc. in order to determine the members' attitudes and opinions regarding the organization and the activities and services that it provides.

Methodology

Gallup executive interviewers contacted, by telephone, 150 grower members of Roses, Inc. during January and February 1991. Qualified respondents were current grower members selected from a list provided by Roses, Inc. Gallup interviewers made multiple callbacks in order to schedule interviews and maintain a representativeness of the sample selected.

Ten percent (10%) of all completed surveys were validated by supervisory callbacks. All completed questionnaires were coded and edited independently as part of quality control. Gallup executive personnel monitored interviews internally as part of the regular, ongoing evaluation process. All data were entered into and analyzed by the Gallup computer. Excellent interviewing and data recording are essential on a project of this nature. Roses, Inc. can be confident that the procedures and quality standards recommended by the Council of American Survey Research Organizations (CASRO) were followed.

Survey Instrument Design

Gallup and Roses, Inc. had joint responsibility for preparation of an appropriate survey instrument for this project. Roses, Inc. had responsibility for identifying question areas and

information desired, and Gallup had responsibility for writing items that were technically correct and without bias. A field-test of the questionnaire was used to check the workability of the individual items before the final study was initiated. Final approval rested with Roses, Inc.

Stability of Results

Because the great majority of grower members (150) were interviewed, at the 95% level of confidence, the maximum expected statistical error range for this sample size is approximately $\pm 4.0\%$. Stated more simply, if 100 different samples of 150 grower members were randomly chosen from the total grower member population, 95 times out of 100 the results obtained would vary no more than approximately ± 4.0 percentage points from the results that would be obtained if the entire grower population were surveyed.

Reports Prepared

Roses, Inc. has been provided a complete set of tabular results by frequency and percentage. These tabular data should serve as reference material and be consulted before important decisions are made. This narrative report focuses on what are felt to be the most meaningful and statistically significant findings of this study.

TABLE 1
Sample Characteristics
(n=150)

	<u>Percent</u>
Sex	
Male	95%
Female	5
Age	
25-34	14%
35-44	25
45-54	31
55-64	17
65 or older	13
Mean	48.6 years
Education	
Less than high school graduate	5%
High school graduate	17
Some college	17
Trade/technical/vocational training	2
College graduate	52
Postgraduate work	7
Income	
\$15,000-\$24,999	1%
\$25,000-\$34,999	8
\$35,000-\$44,999	9
\$45,000-\$54,999	15
\$55,000 or more	63
Refused	5
Mean	\$60,490
Area	
Canada	18%
Northeast	19
South Central	7
North Central	14
West	41

* A "typical" Roses, Inc. grower member had the following characteristics:

- male (95%)
- 35-54 years of age (56%; average age 48.6)
- incomes of \$55,000 or more (63%; average \$60,490)
- live in the western states (41%)

TABLE 2
Sample Characteristics - Business
(n=150)

<u>Type of Crops (other than roses)</u>	<u>Percent</u>
Carnations	11%
Lilies	10
Stephanotis plants	9
Poinsettias	7
Potted plants	7
Alstroemeria	7
Chrysanthemums	5
Cut flowers	5
Bedding plants	5
Foilage plants	4
Orchids	4
Potted mums	3
Mums	3
Freesia	3
Flowering bulbs	3
Field flowers	3
Easter lilies	3
Gardenias	2
Flowering plants	2
Blooming plants	2
Other	22
None	41
 <u>Number of Plants</u>	
Under 5,000	5%
5,000-9,999	5
10,000-19,999	9
20,000-29,999	7
30,000-39,999	11
40,000-49,999	9
50,000-59,999	5
60,000-69,999	9
70,000-79,999	5
80,000-89,999	1
90,000-99,999	1
100,000-124,999	7
125,000-149,999	5
159,000-174,999	3
175,000-199,999	4
200,000 or more	10
Don't know	3
 Mean	 90,630

- * Approximately four-tenths (41%) of the respondents said they grew no crops other than roses. The most popular "other" types of plants grown by Roses, Inc. members included:
 - carnations (11%)
 - lilies (10%)
 - stephanotis plants (9%)

- * Roses, Inc. members reported growing a wide variety of plants each year, with the average number of plants grown by each member being 90,630. Approximately one-half of the members said they grew more than 50,000 plants each year. Members who lived in California tended on average to grow more plants (137,540) than did their counterparts in either Canada or the rest of the United States.

"What were the two most important reasons why you initially joined Roses, Inc.?"

TABLE 3
Most Important Reasons for Initially Joining Roses, Inc.
(n=150)

<u>Response</u>	<u>1st Response</u>	<u>Two Responses</u>
Information	21%	36%
Background/interested	14	16
Share information among growers	11	25
Research	9	21
To learn more/education	9	17
Fellowship	7	8
Support industry	6	8
Well organized/strong organization	5	8
Keep up-to-date/in touch with industry	4	11
Bulletins/mailing list	2	6
Representation/promotion of rose industry	1	7
Other	7	11
Don't know	3	3

* Members initially joined Roses, Inc. primarily for the information they derived from the organization. Either directly (information 36% mention) or indirectly (to learn more 17%); almost all of the members cited some type of information as an important reason why they initially joined Roses, Inc. Of lesser importance as a reason for initially joining the organization was fellowship and support of the industry. Both of these responses were named by less than 10% of the members.

"What are the two most important reasons why you maintain your membership in Roses, Inc.?"

TABLE 4
Most Important Reasons Membership is Maintained
(n=150)

<u>Response</u>	<u>1st Response</u>	<u>Two Responses</u>
Information	19%	33%
Research	15	24
Meet others/exchange ideas	11	27
Keep up-to-date/in touch with industry	8	15
Support	6	13
Fellowship	6	9
Well organized/strong organization	6	9
Background/interested	5	5
Printed materials/ mailing list	4	5
Education	4	10
Representation/promotion of rose industry	4	9
Monitors imports	2	4
Greater contacts/resources	1	3
Other	5	9
Don't know	3	3

- * Although information was also the most frequently mentioned reason why members maintain their membership in Roses, Inc. (as opposed to why they initially joined), research and having the opportunity to meet other growers and exchange ideas became strong secondary themes. Approximately one-fourth of the members cited research (24%) and meeting other/exchanging ideas (27%) as reasons why they maintain their Roses, Inc. membership. It appears as if growers go through a "growth phase" with regard to their Roses, Inc. membership, initially joining to get their feet wet in the industry and to learn more about the industry and maintaining their membership for more in-depth types of research and the contact opportunities it provides.

**"HAVE YOU EVER SERVED ON A ROSES, INC. BOARD OR
COMMITTEE?"**

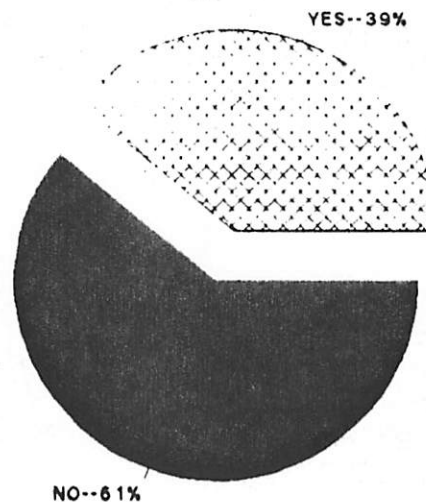


FIGURE 1

* Approximately four-tenths (39%) of the members said they have served on a Roses, Inc. board or committee. Those who were most likely to have served on a committee included:

- respondents who had household incomes over \$55,000 (49%)
- respondents who grew more than 50,000 plants (50%)
- respondents from states/countries other than California or Canada (50%)

"Roses, Inc. provides many different services and benefits to their members. On a one-to-five scale, where "5" is very important and "1" is not at all important, please rate how important each of these association services and benefits are to you. How about (____)?"

TABLE 5
Importance of Association Services and Benefits
(n=150)

<u>Service</u>	<u>Mean*</u>	<u>% 4/5</u>
Research sponsored by Roses, Inc.	4.34	82%
Rose Manual	4.15	78
Roses, Inc. Bulletin	3.97	70
Care and handling recommendations	3.83	66
Roses, Inc. educational meetings	3.83	65
Representation of the rose industry in regulatory matters, such as testimony before the International Trade Commission on Imports	3.79	65
"Newsbriefs" to members	3.65	57
Membership directory	3.59	55
Public relations materials and programs	3.16	41
Listing of rose varieties	3.17	36
Floral index information and Market Place Newsletter	2.86	32
Bulletin Index of past articles	2.95	30
Printed materials, such as rose care tags, flyers, etc.	2.85	27
Miscellaneous "rose" items such as Christmas cards, bumper stickers, etc.	2.13	11

* 5=very important, ... 1=not at all important

* According to the members, the two most important services or benefits offered by Roses, Inc. are:

- research sponsored by Roses, Inc. (4.34)
- Rose Manual (4.15)

These two services received significantly higher mean ratings of importance from the respondents than did all the others tested. Research was particularly important to members who had served on a board or committee (4.53) and members who were very satisfied with their Roses, Inc. membership (4.51). The Rose manual tended to be more important to respondents who did not live in California or Canada (4.36) and members who grew less than 50,000 plants annually (4.28).

- * A "secondary" tier of important services and benefits among members included:
 - Roses, Inc. Bulletin (3.97)
 - Care and handling recommendations (3.83)
 - Roses, Inc. educational meetings (3.83)
 - Representation of the rose industry in regulatory matters (3.79)

- * Benefits and services of those that received relatively low ratings of importance from the members included:
 - miscellaneous "rose" items such as Christmas cards, bumper stickers, etc. (2.13)
 - printed materials such as rose care tags, flyers (2.85)
 - bulletin index of past articles (2.95)

"Of all the services and benefits we've discussed, and any others you can think of, which one is the most important to you?"

TABLE 6
Most Important Service/Benefit
(n=150)

<u>Response</u>	<u>Percent</u>
Research sponsored by Roses, Inc.	32%
Roses, Inc. educational meetings	19
Representation of the Rose industry in regulatory matters such as testimony before the International Commission on Imports	12
Roses, Inc. Bulletin	10
Promotion of rose industry	5
Overall information	3
Care and handling recommendations	2
Listings of rose varieties	2
Other	10
Don't know	5

* When limited to a single service or benefit to rate as the most important service or benefit of a Roses, Inc. membership, members tended to cite research sponsored by Roses, Inc. (32%). The only other benefits that received at least 10% mention were educational meetings (19%), representation and regulatory matters (12%) and Roses, Inc. Bulletin (10%).

"How often do you read each of the following regular columns or articles that appear in the Bulletin? Do you read them always, usually, sometimes, or rarely? How about (____)?"

TABLE 7
Frequency of Reading Columns/Articles in Bulletin
(n=150)

<u>Column/Article</u>	<u>Mean*</u>	<u>% Always/ Usually</u>
Research Progress Reports	3.26	79%
News Briefs	3.13	74
Import Watch	3.10	73
Management articles	3.01	71
Table of Contents	2.94	67
Editorials	2.79	57
Rosemark Review	2.76	58
Face to Face	2.68	52
SAF's Washington Report	2.57	51

* 4=always read, 3= usually read, 2=sometimes read, 1=rarely read

* Roses, Inc. members tended most frequently to read research progress reports (79% reported reading this either always or usually), News Briefs (74% always/usually), and import watch (73%). Of lesser interest to them (based upon the frequency of reading) were SAF's Washington Report (51% always or usually), Face to Face (52%) and editorials (57%). It should be noted, however, that all of the columns and articles tested in Bulletin had at least 50% of the members saying they either always or usually read that particular column or article.

* For the most part, larger (in terms of number of plants they grow) growers and growers who had served on a committee or board tended to be more frequent readers of the Bulletin's columns and articles. This is true for all of the columns and articles tested with the exception of table of contents.

"The Floral Trade Council is a separate organization from Roses, Inc. and now represents all types of fresh flowers, including roses in matters of international trade. Their work is monitored by the Roses, Inc. Import Action Committee. Do you feel that the Floral Trade Council adequately represents you in this area?"

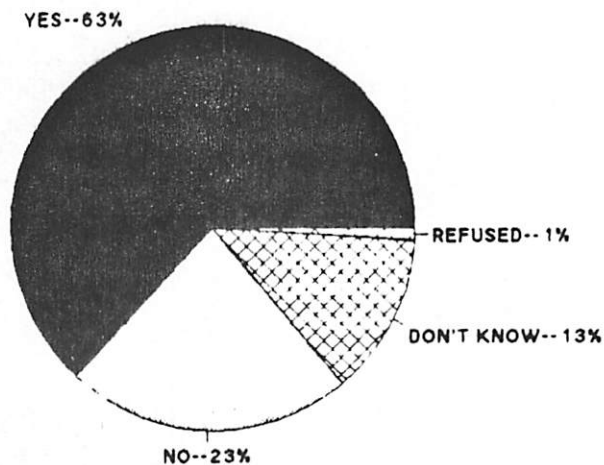


FIGURE 2

- * Almost two-thirds (63%) of the respondents said they felt the Floral Trade Council adequately represented them. Again, larger growers, and growers who had served on a committee or board were particularly likely to feel the Floral Trade Council had adequately represented them. It should be noted that while approximately one-fourth (23%) of the growers felt they were not adequately represented by the Floral Trade Council, more than one-tenth (12%) were unable to express an opinion with regard to their Floral Trade Council representation. This indicates that these individuals do not have a high enough degree of familiarity to be able to "rate" the current representation provided by the Floral Trade Council. Grower members in Canada (19% don't know) and smaller grower members were particularly likely to be unable to rate the representation of the Floral Trade Council.

"Should Roses, Inc. Import Action Committee continue to only monitor this work, or should it be more involved and carry on a separate program of its own?"

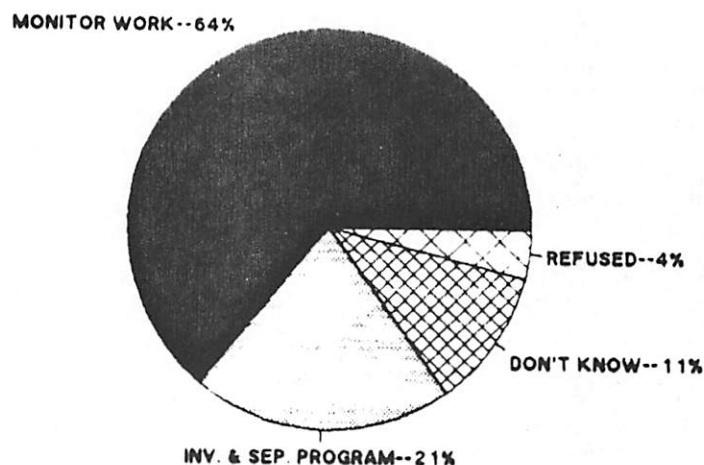


FIGURE 3

- * Almost two-thirds (64%) of the respondents believed that Roses, Inc. Import Action Committee should only monitor the work of the Floral Trade Program rather than be involved in carrying on a separate program of its own. Only one-fifth (21%) of the members favor Roses, Inc. Import Action Committee developing and carrying on a program separate from the Floral Trade Council. Again, approximately one-tenth of these approximately 11% of the members felt they were unable to answer this question specifically, apparently due to a lack of awareness of the Floral Trade Council's work.

"Do you think the work of the Import Action Committee is generally more important, less important or about the same in importance to you than (____)?"

TABLE 8
Importance of Import Action Committee
Relative to Other Activities
(n=150)

<u>Activities</u>	<u>% Import Action Committee is</u>	
	<u>More Important</u>	<u>Less Important</u>
Research	21%	45%
Care and handling	33	33
Marketing	25	47
Membership services	25	36
Government relations	19	28

- * Relative to other activities, the Import Action Committee's work was deemed of equal importance as care and handling activities (33% rating it more important, 33% rating it less important), but less important than either research (21% more important, 45% less important = net difference 24% less important), marketing (22% net less important), membership services (11% net less important), and government relations (9% net less important). Members in California tended to rate the importance of the Import Action Committee counterparts either in the rest of the continental United States or in Canada.

"Should Roses, Inc. have a government affairs type committee through which federal regulation is monitored and explained to members when enacted, and which would represent the rose growers' position on such legislation as is being considered by the government?"

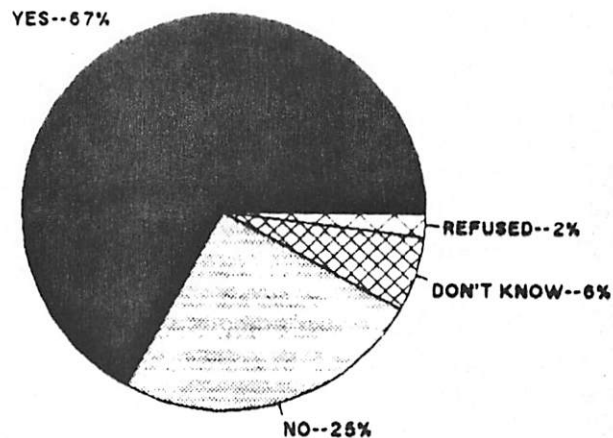


FIGURE 4

- * Approximately two-thirds (67%) said they felt Roses, Inc. should have a government affairs type committee to which federal regulations would be monitored and explained to members when enacted and that would represent the roses growers' position on such legislation as being considered by the government. Those members who tended to most favor having such a "government affairs" type committee included:
- smaller growers (72%)
 - growers living in state/areas other than California or Canada (70%).

"Starting in 1990, the Roses, Inc. board began a test of having only one spring meeting, rather than the earlier plan of one in the East Region and one in the West Region. This eliminated one educational meeting, rose display and tour set up. Do you favor or oppose having only one spring meeting?"

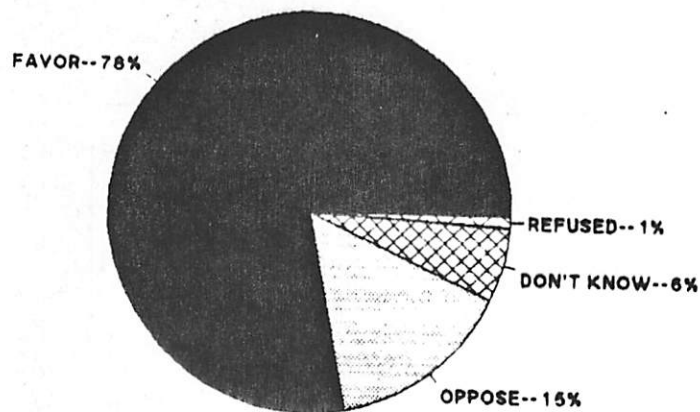


FIGURE 5

- * The great majority (78%) of the members said they favored having only one spring meeting rather than the earlier plan of having one in the East Region and one in the West region. This plan of having only one meeting was particularly popular among members from Canada (85% favor) and members who had served on a board or committee (90%).

"Please tell me if you think it is very important, somewhat important, somewhat unimportant, or very unimportant for Roses, Inc. to be involved in the following types of research. How about (____)?"

TABLE 9
Importance of Roses, Inc. Involvement
in Various Types of Research
(n=150)

<u>Type</u>	<u>Mean*</u>	<u>% Very Important</u>
Insect control	3.75	79%
Disease control	3.73	77
Nutrition	3.68	75
Mildew control	3.64	74
Integrated pest management	3.47	61
Environmental control	3.49	59
Rose care and handling	3.40	51
Market research	3.33	50
Energy conservation	3.18	39
Hybridizing	2.89	35

* 4=very important, 3=somewhat important, 2=somewhat unimportant, 1=very unimportant

* Those types of research that were deemed most important for Roses, Inc. to be involved in (according to their members) included insect control (79% very important), disease control (77%), nutrition (75%), and mildew control (74%). All four of these issues received nearly identical ratings of importance from the members with each having more than seven-tenths say this type of research is very important for Roses, Inc. to be involved in. Research that was deemed to be relatively less important for Roses, Inc. to be involved in included hybridizing (35%), energy conservation (39%), and market research (50%).

* It should be noted that only two of ten types of research tested among members received less than 50% very important ratings for Roses, Inc. involvement. This further validates earlier findings of the importance the individual members are placing on research activities.

"What type of research projects would you like to see Roses, Inc. involved in? What would you like to see them doing that they're not doing?"

TABLE 10
Type of Research Would Like to
See Roses, Inc. Involved In
(n=150)

<u>Response</u>	<u>Percent</u>
Pest/disease control	15%
More research on mildew	7
Chemicals/nutrients research	6
Import research	3
Producing new varieties	3
Growing aspects	2
Other	27
Don't know	9
Nothing	29

* On an unaided basis, members would most like to see additional research being performed on pest/disease control (15% mention). The only other types of research mentioned by more than five percent (5%) of the members were additional research on mildew (7%) and chemicals/nutrients research (6%). Approximately one-third of the respondents were unable to name a type of research project they would like to see Roses, Inc. involved in.

**"HAVE YOU DONATED TO THE JOSEPH H. HILL MEMORIAL
FOUNDATION IN ORDER TO SUPPORT RESEARCH?"**

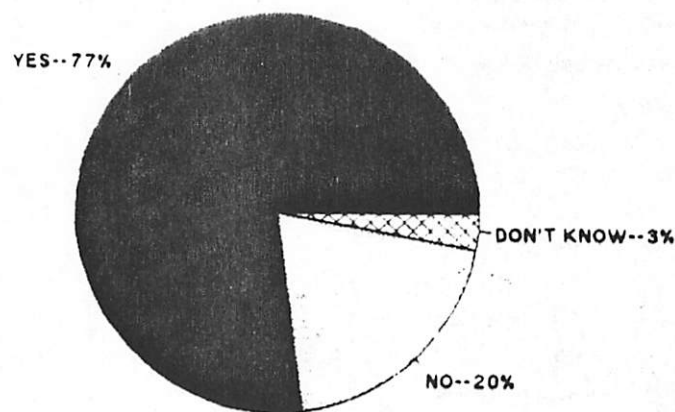


FIGURE 6

- * Slightly more than three-fourths (77%) of the respondents said they have donated to the Joseph H. Hill Memorial Foundation in order to support research. Donation behavior was most common among respondents who lived outside of California or Canada (81%), larger growers (84%) and members who had served on a board or committee (97%).
- * Among respondents who had not donated to the Joseph H. Hill Memorial Foundation, the most common reasons cited were that they lacked money (27%) or that they did not see the practical benefit/results of such a donation (20%).

**"WHICH OF THE FOLLOWING STATEMENTS BEST
DESCRIBES YOUR USAGE OF ROSES, INC.
RESEARCH FOUNDATION?"**

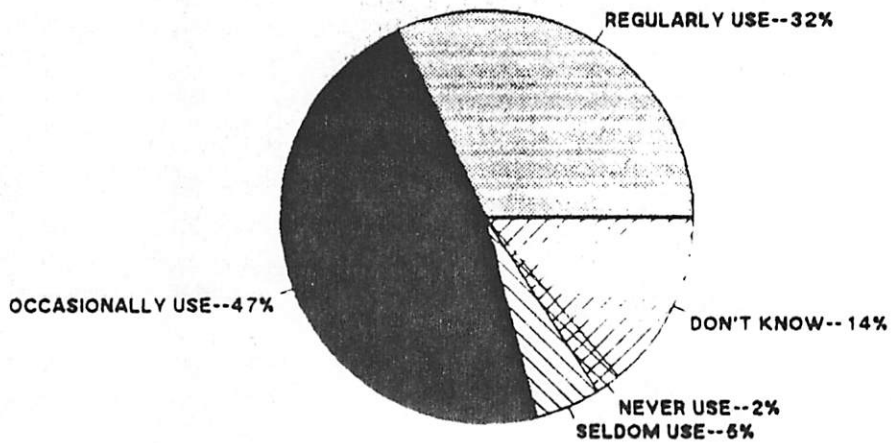


FIGURE 7

* According to the members, the majority regularly or occasionally use Roses, Inc. research information. Approximately five-tenths (47%) said they occasionally use such research while 32% said they were regular users of Roses, Inc. research information. Less than one-tenth of the members said they either seldom used Roses, Inc. research information (5%) or that they never used Roses, Inc. research information (2%).

"Please tell me if you think the following trade and public relations programs are excellent, good, fair, or poor. How about (____)?"

TABLE 11
Ratings of Trade and Public Relations Programs
(n=150)

<u>Program</u>	<u>Mean*</u>	<u>% Excellent</u>
Trade press releases on the association activities and events, etc.	2.84	18%
America's perfect gift program	2.81	19
Florist convention displays (SAF convention)	2.82	13
"All About Roses" seminar in conjunction with SAF	2.71	13
Rose donations for consumer or government events and special projects	2.69	13
Floral index information	2.48	5

* 4=excellent, 3=good, 2=fair, 1=poor

* Five of the six trade and public relations programs received nearly identical ratings from the members and overall should be viewed as receiving "moderate to moderately high" evaluations. The exception to this being the Floral Index Information. Only five percent (5%) of the members rated this as excellent, with more than four-tenths (42%) rating this program as either only fair (33%) or poor (9%). This program was particularly criticized by members from Canada (50% fair or poor) and members who had served on a board or committee (46% fair or poor).

"Do you think Roses, Inc. should be actively involved in the following activities? How about (____)?"

TABLE 12
Activities Roses, Inc. Should be Involved In
(n=150)

<u>Activity</u>	<u>% "yes"</u>
Educating retailers about the care and handling of roses	94%
Monitoring the effect of government regulations on growers	90
Our own public relations department within Roses, Inc.	75
Working with wire services	75
Fighting unfair practices by overseas growers	75
Establishing grades and standards for roses	74
National labeling of U.S. grown roses	65
Paid advertising in the florist trade press	56
Paid consumer advertising of roses	55
Sponsoring designers or commentators at florist design schools	54
Assist grower members in brand identification of their own roses	49
National marketing order for roses	47

* Almost all of the respondents believed that Roses, Inc. should be actively involved in the following programs:

- educating retailers about the care and handling of roses (94%)
- monitoring the effect of government regulations on growers (90%)
- having their own public relations department within Roses, Inc. (75%)
- working with wire services (75%)

- * There tended to be less support, however, for active involvement by Roses, Inc. in:
 - assisting grower members in brand identification of their own roses (49%)
 - national marketing order for roses (47%)
 - sponsoring designers or commentators at florist design schools (54%)
 - paid consumer advertising of roses (55%)
 - paid advertising in the Florist Trade Press (56%)

- * In almost all cases, a majority of members favored active involvement by Roses, Inc. Unlike earlier issues, there was very little variance among larger and smaller growers with regard to attitude toward Roses, Inc. being actively involved in these activities. For the most part, both larger and smaller growers agreed on the relative importance of Roses, Inc. being actively involved in the tested activities.

"I'm going to read you a list of services that Roses, Inc. could offer. For each service, please tell me on a one-to-five scale, where "5" is very appealing, and "1" is not at all appealing, how appealing each service is to you. How about?"

TABLE 13
Appeal Ratings of Various Potential
Roses, Inc. Services
(n=150)

<u>Service</u>	<u>Mean*</u>	<u>% 4/5</u>
Access to a professional rose production consultant for advice on rose growing to include insect and disease control	3.73	64%
A research/only "bulletin" published quarterly	3.76	62
Greenhouse tour trips	3.81	60
A new committee to keep track of government affairs and regulations on the rose industry	3.31	47
Programs for young, newer owners and managers	3.38	45
Business management seminars	3.09	36
Trade fairs	2.84	22

* 5=very appealing,1=not at all appealing

* Of the potential services that Roses, Inc. could offer, the ones that had the greatest level of appeal to members were:

- greenhouse tour trips (3.81)
- a research-only "bulletin" published quarterly (3.76)
- access to a professional rose production consultant for advice on rose growing to include insect and disease control (3.73)

All three of these services received high levels of appeal from at least six-tenths of the members. Of lower appeal to the members were services such as business management seminars (3.09), trade fairs (2.84), a new committee to keep track of government affairs and regulations on the rose industry (3.31) and programs for young, newer owners and managers (3.38). In general, smaller growers tended to rate all of the perspective new services higher than their larger grower counterparts.

"Would you say that the paid staff at the Haslett office is doing an excellent, good, fair or poor job?"

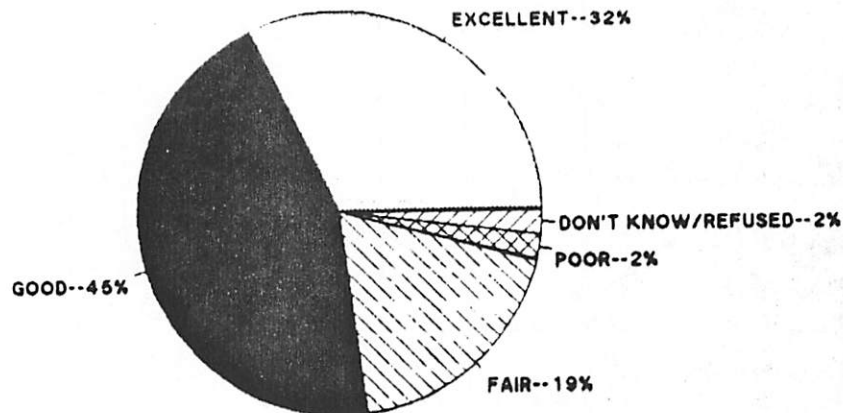


FIGURE 8

- * For the most part, respondents gave the paid staff at the Haslett office high ratings for the job they are performing. More than three-fourths of the members said the paid staff at the Haslett office is either doing an excellent (32%) or a good (45%) job and only two percent (2%) of the members interviewed felt the paid staff was doing a poor job. Those respondent groups who tended to rate the paid staff higher included members from Canada (3.24), members who grew under 50,000 plants (3.26), members who have not served on a committee or board (3.14), and members who feel the membership dues are very reasonable (3.39).

"How responsive do you think the Haslett office staff is? Do you think they are very responsive, somewhat responsive, not very responsive, or not at all responsive to the needs of Roses, Inc. members?"

TABLE 14
Responsiveness Ratings of the
Haslett Office Staff
(n=150)

<u>Response</u>	<u>Percent</u>
Very responsive	61%
Somewhat responsive	26
Not very responsive	8
Not at all responsive	1
Don't know	3
Mean*	3.54

* 4=very responsive, ... 1=not at all responsive

* For the most part, the Haslett office staff was considered very responsive to members' needs. Almost nine-tenths of the members said the Haslett office had been either very responsive (61%) or somewhat responsive (26%) to the needs of Roses, Inc. members. Only one percent rated the Haslett office as being not at all responsive. Again, those member groups that tended to rate the Haslett office as being more responsive included:

- smaller growers (3.67)
- Canadian members (3.80)
- members who were very satisfied with their membership (3.79)
- members who felt that members dues were very reasonable (3.81)

"Do you favor or oppose maintaining the current Board of Governors structure of Roses, Inc. ,which has a large board meeting twice a year and places a high degree of responsibility on a paid staff?"

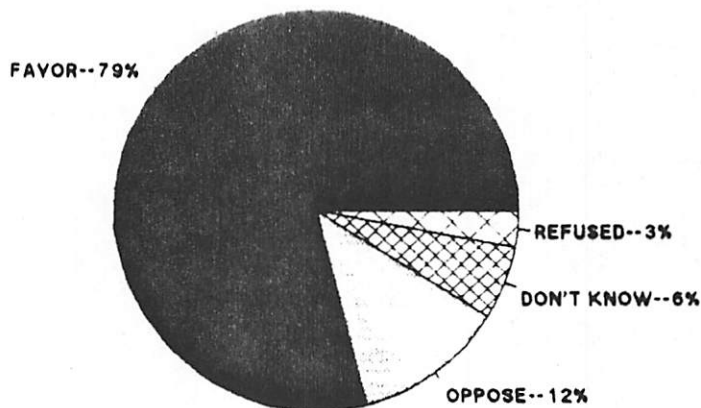


FIGURE 9

* Almost four-fifths (79%) of the members said they favored maintaining the current board of governors structure of Roses, Inc., which has a large board meeting twice a year and places a high degree of responsibility on the paid staff. Only 12% of the members said they opposed maintaining the current board of governors structure. Those most likely to oppose the current board include members from California (17% oppose) and members who rate the paid staff as doing a fair job (29%).

"There are currently 22 positions on the Roses, Inc. board, ten of which are appointed by the president. Do you think that (____)?"

TABLE 15
Attitudes on Number of Positions
on Roses, Inc. Board
(n=150)

<u>Statement</u>	<u>Percent</u>
It's just right the way it is	65%
More positions should be elected by members	24
The president should be able to appoint more positions	1
Don't know	7
Refused	3

* With regard to the number of positions on the Roses, Inc. board and the proportion of which are appointed by the president, almost two-thirds of the members said they favor the current system. Only one-fourth (24%) say more positions should be elected by members, while just one percent (1%) of the members favor the president being able to appoint more positions. Clearly there is a consensual agreement that the current system is accepted by members. Larger growers (74%) and members who had served on a board or committee were particularly likely to approve of the current format.

"Roses, Inc. currently has an East and West Region, with each having equal representation on the board. Do you think the regional representation is a fair method of representing the membership?"

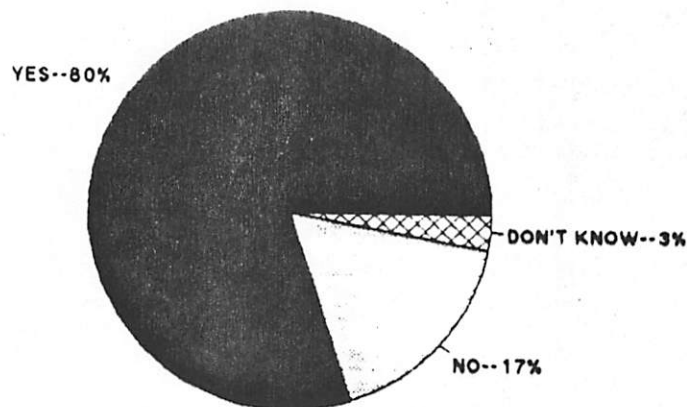


FIGURE 10

- * Four-fifths (80%) of the respondents say they felt the current East/West regional representation of the board was a fair method of representing the membership. This was particularly the opinion of respondents who lived in Canada (88%) and larger growers (82%). Members who resided in California were most opposed to the current regional representativeness of the board (32% opposing this system). This is most likely due to the fact that California makes up a greater proportion of the total member population than any other state.

**LEVEL OF SATISFACTION WITH ROSES, INC.
MEMBERSHIP
(n=150)**

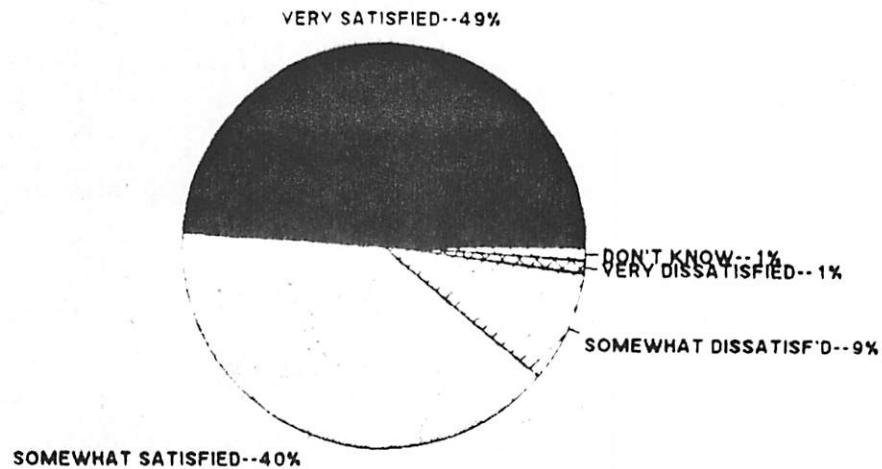


FIGURE 11

* Almost nine-tenths (89%) of the members said they were either very satisfied (49%) or somewhat satisfied (40%) with their Roses, Inc. membership. Only one percent (1%) of the membership said they were very dissatisfied with their membership. Satisfaction tended to be highest among Canadian members (65% very satisfied) and smaller growers (59%). Members from California tended to be the least satisfied group (17% somewhat or very dissatisfied).

"Overall, would you say that the Roses, Inc. membership dues are very reasonable for the value received, somewhat reasonable, somewhat unreasonable, or very unreasonable for the value received?"

TABLE 16
Reasonableness of Roses, Inc.
Membership Dues
(n=150)

<u>Response</u>	<u>Percent</u>
Very reasonable	35%
Somewhat reasonable	54
Somewhat unreasonable	7
Very unreasonable	3
Don't know	1
Mean*	3.22

* 4=very reasonable, ... 1=very unreasonable

* Approximately nine-tenths (89%) of the respondents rated their membership dues from Roses, Inc. as either very reasonable (35%) or somewhat reasonable (54%). These numbers are extremely high given the fact that one of the first areas that membership groups typically complain about is the cost of being a member. Only three percent (3%) of the members felt their current dues were very unreasonable. Believing that the dues were reasonable was highest among members living outside the state of California (3.33), smaller growers (3.31) and members who had served on a committee or board (3.29). As was the case with satisfaction, California members tended to see dues as the most unreasonable (2.95).

"For the current fiscal year, Roses, Inc. has asked its grower members to pay a dues surcharge of \$50 to \$200. This was put in place July 1, 1990, after four years of no dues increase, to cover inflation and maintain budgeted programs. Which of the following statements best describes your view of this increase? Is it that (____)?"

TABLE 17
Attitudes Toward Surcharge Increase
(n=150)

<u>Response</u>	<u>Percent</u>
You don't like the surcharge approach and would prefer a "per plant" or "dollars per thousand plants" basis, like the rest of the dues	46%
You agree with the surcharge set up	34
You agree with the surcharge, but the set up needs to be done on a different basis	15
Don't know	4

- * There was quite a level of disagreement among the members with regard to the surcharge. Almost one-half (46%) said they did not like the surcharge approach and would prefer a "per plant" or "dollars per thousand plants" basis like the rest of the dues, while another one-half (49%) said they either agreed with the surcharge set up (34%) or agreed with the surcharge, but believe the set up needed to be done on a different basis (15%). What is evident, is that the current surcharge set up is not favored by the majority of the membership. Those most opposed to the current surcharge set up include members outside of the state of California.

"DO YOU PLAN ON MAINTAINING YOUR MEMBERSHIP IN
ROSES, INC.?"
(n=150)

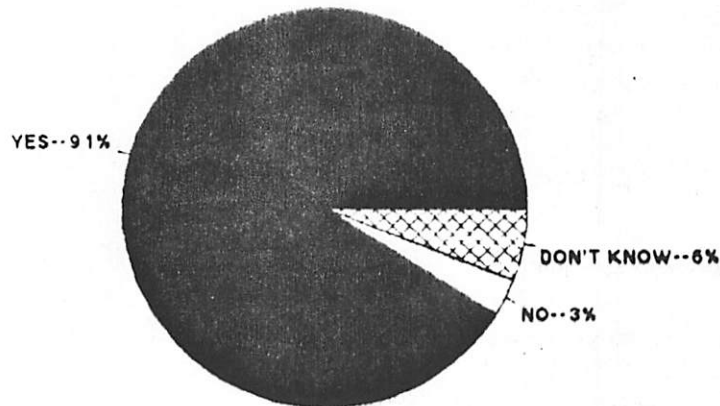


FIGURE 12

- * Almost all (91%) of the members said they plan on maintaining their membership in Roses, Inc. Three percent (3%) of the membership do not plan on maintaining their membership, while six percent (6%) are unsure. None of the smaller members (in terms of household income) plan on letting their membership lapse in Roses, Inc. The larger growers (in terms of household income and number of plants grown) tended to be much more uncertain about their future in Roses, Inc. than their smaller counterparts.

- * The primary reason stated by individuals who were not sure if they would maintain their association membership was that dues were too high.