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**U.S. COMMODITY PROMOTION ORGANIZATIONS: OBJECTIVES,
ACTIVITIES, AND EVALUATION METHODS**

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PREFACE

This study was initially undertaken, at the suggestion of Sermin Hardesty, to generate some information to be presented at the fall 1990 meeting of the NEC-63 Regional Committee on Commodity Promotion Programs, which was held at the Marines Memorial Club in San Francisco, California on October 25 and 26, 1990. A preliminary report of the survey results was presented at that gathering. Subsequent analysis of the survey data led to the present report.

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ABSTRACT

During the summer of 1990 we asked all of the U.S. commodity promotion organizations we could identify to complete a questionnaire about their objectives, program activities, and evaluation methods. The 116 organizations that responded had a total staff of 2,017 and invested over \$750 million in programs and administration in 1990. The responses indicated that producer boards of directors are very much involved in formulating program objectives. All of our respondents place a high priority on increasing aggregate commodity sales and on maximizing producer net returns. They use a variety of strategies and means to achieve their objectives, and also use a variety of evaluation methods. This report discusses in detail the relationships among objectives, activities, and evaluation methods. Our analysis of the responses leads us to conclude that those organizations that combine econometric analysis with a mix of other evaluation measures are likely to have a more comprehensive understanding of the role that their promotion programs play in changing consumer beliefs and attitudes, and subsequently, purchasing behavior.

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U.S. COMMODITY PROMOTION ORGANIZATIONS: OBJECTIVES, ACTIVITIES, AND EVALUATION METHODS

John E. Lenz, Olan D. Forker, and Susan Hurst*

INTRODUCTION

Producer-funded generic commodity promotion has been practiced for a variety of agricultural commodities for over a half-century in the United States. Among the oldest programs still in existence are the National Dairy Council and several affiliated State Dairy Council units, and the Florida citrus program (Frank). The early programs were modest by current standards; over the years the number, variety, and size of programs have increased substantially. The early programs lacked any legislative underpinnings; rather, they were simply arrangements in which groups of individual producers voluntarily contributed money to a promotion fund. The problem of free riders motivated producers to begin requesting and receiving first state and then federal legislative authority for mandatory checkoffs.¹ Enabling legislation for such programs typically included provisions allowing the funds to be used both for commodity promotion and commodity-related research of various types. Though legislation authorizing the early programs typically included provisions under which producers could request and receive refunds of the monies they paid into the promotion funds, there has recently been a movement toward mandatory programs with no refund provisions.

During the summer of 1990, we undertook a survey of commodity promotion organizations operating in the U.S. The purpose of the survey was to generate information about various aspects of the operations of commodity promotion organizations. In particular, we designed the survey instrument to elicit information about the promotion organizations' objective-setting processes, the methods they use to accomplish their objectives, and what, if anything, they do to evaluate the success of their programs.

For this study, we were primarily interested in program evaluation; however, since evaluation methods should not be studied in isolation, we designed our survey instrument to elicit information necessary for setting the proper context in which to examine existing approaches to program evaluation. Oversight and evaluation of program activities is important at all program stages, from design through implementation to *ex post* evaluation. However, formal evaluations to determine whether or not stated program objectives are being realized are not always conducted, most frequently due to perceived, and in many cases real, budgetary constraints.

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¹The checkoff mode of funding generic promotion is one in which a small portion is deducted from producers' checks for each unit of commodity that they market commercially.

Over the past half-century, a considerable body of literature relating to commodity promotion evaluation has developed. Hurst and Forker have compiled an annotated bibliography of over 100 articles relating to generic commodity promotion research, with a majority of these pertaining to the evaluation of specific commodity promotion programs. The present study is an attempt to provide descriptive information of a more general nature than previous commodity-oriented studies. More in-depth analysis is also being conducted and will be published in technical journals.

SURVEY METHODS

The survey instrument (see the Appendix) contained 15 questions of varying length and complexity. The focus of the questions started with the organizations' objective-setting processes and progressed through budgetary allocations to program delivery and evaluation methods, ending with requests for some descriptive organizational information.

The survey was administered by mail following the procedures set out by Dillman. The questionnaire and a cover letter were mailed, along with a stamped return envelope, on August 1, 1990. One week later a follow-up post card was sent to serve as a reminder to respond or as a thank-you if the questionnaire had already been returned. Three weeks after the initial mailing, a revised cover letter and another copy of the questionnaire were sent to each organization that had not responded. As the returned questionnaires were coded, follow-up phone calls were made when necessary to clarify ambiguous or incomplete responses. Of the 177 organizations included in the initial mailing, 116 organizations returned questionnaires containing useable responses. Excluding ineligible organizations,² this represents a response rate of 71 percent.

The following sections summarize the information provided by our respondents. Although our survey does not constitute a complete census of commodity promotion organizations operating in the U.S., our knowledge of generic promotion activities leads us to believe that the survey covered organizations responsible for about 80 percent of all generic commodity promotion funds expended during 1990.

COMMODITIES AND BUDGETS

Fifty-two different commodities are promoted by our 116 respondents. For expository convenience, each respondent was assigned to one of the seven commodity categories described in Table 1.

²Of the 177 organizations included in the original mailing, 14 either were not currently involved in promotion activities or contracted for all program activities to be performed by another organization that was included in the survey. Of the remaining organizations, 47 did not respond. Based on our knowledge of commodity promotion organizations, the nonrespondents were estimated to account for only a small proportion of U.S. promotion dollars and activity.

Table 1. Classifications Used to Construct Commodity Groups

GRAINS & OILSEEDS	VEGETABLES
Corn	Artichokes
Dry Beans	Asparagus
Grain Sorghum	Avocados
Rice	Lettuce
Soybeans and Soy products	Olives
Wheat and Wheat products	Onions
	Potatoes
	Tomatoes
DAIRY	FIBERS
Fluid Milk	Cotton
Manufactured Dairy Products	Mohair
	Wool
FRUITS & NUTS	MEAT, POULTRY, SEAFOOD, & EGGS
Almonds	Beef and Beef Products
Apples and Apple Products	Eggs and Egg Products
Apricots	Fish and Seafood
Tart Cherries	Lamb
Dates	Pork
Dried Figs	Turkey
Grapes and Grape Products	
Hazelnuts	OTHER
Melons	All Wyoming Agricultural Products
Nectarines	German Agricultural Products
Orange Juice	Honey
Papayas	Indoor Tropical Plants
Peaches	Nursery Stock
Peanuts	Sugar
Pears	
Pistachios	
Plums	
Prunes	
Raisins	
Strawberries	
Walnuts	
Watermelons	
Wine	

Dairy farmers support the largest combined program pertaining to a single raw commodity. At least 39 state, regional and national organizations are involved in promoting fluid milk and manufactured dairy products. The dairy promotion organizations responding to our survey reported a combined budget of \$209 million, which is 28 percent of the total expenditures reported by all our respondents. Table 2 contains information about the total staffs, total budgets, and the numbers of organizations for each commodity category.

Table 2. Number of Commodity Promotion Organizations, Total Staff, and Total Budgets, All Survey Respondents by Commodity Category, United States, 1990

COMMODITY CATEGORY	NUMBER OF RESPONDENTS	TOTAL STAFF	TOTAL BUDGET
			(\$THOUSANDS)
GRAINS & OILSEEDS	14	262	\$48,047
DAIRY	39	603	208,856
FRUITS & NUTS	30	410	217,903
MEAT, POULTRY, SEAFOOD, & EGGS	12	254	193,854
VEGETABLES	11	71	23,867
FIBERS	4	316	56,379
OTHER	6	101	3,070
TOTAL	116	2,017	\$751,976

Table 3 contains a further classification of the organizations in each commodity category based on their total budgets. Thirty of the organizations (26%) reported annual budgets of \$500,000 or less, while nine organizations (8%) reported budgets of \$25 million or more. Only the VEGETABLES and OTHER categories did not contain any organizations with a budget of \$25 million or more. Overall, total annual budgets ranged from \$25,000 to \$82 million. The median budget was \$1,285,350, while the mean was \$6,482,547.

Table 3. Classification of Respondents by Commodity Category and Budget Size

COMMODITY CATEGORY	TOTAL BUDGET (\$MILLIONS)						ALL
	<.5	.5-1	1-5	5-10	10-25	>25	
GRAINS & OILSEEDS	4	4	5	0	0	1	14
DAIRY	8	6	18	1	5	1	39
FRUITS & NUTS	10	6	4	3	5	2	30
MEAT, POULTRY, SEAFOOD, & EGGS	2	0	2	3	2	3	12
VEGETABLES	5	1	3	2	0	0	11
FIBERS	0	1	1	0	0	2	4
OTHER	4	2	0	0	0	0	6
ALL	33	20	33	9	12	9	116

Note: 3 organizations in the <.5 column did not report their total budgets.

FUNDING AUTHORITY

The legal authority for funding is an important factor in determining the amount of money that can be collected from producers or processors to conduct a commodity promotion and research program. Many of the commodity promotion organizations that began in the 1920s were voluntarily funded, with interested producers agreeing on the amount each would contribute, usually based on the volume of their commodity marketings. During the 1930s some states passed commodity-specific enabling legislation authorizing mandatory payments by all producers of the affected commodity, though in many cases refunds were available upon request. These programs were referred to as state-mandated promotion checkoff programs. Also in the 1930s, Federal market order legislation began authorizing use of market-order funds to promote a few fruit and vegetable commodities.

Over the years, the number of voluntary and state-mandated promotion programs has grown rapidly, particularly during the 1960s and 1970s. However, both types of programs had one major shortcoming, namely the "free rider" problem. This occurred since all producers of a promoted commodity shared in the positive effects of the promotion program even if only a small percentage actually contributed to its funding. Over the past two decades, many commodity groups have been requesting and receiving federal legislative authority for promotion assessments on all producers of their specific commodities. Although legislation was enacted granting comprehensive assessment authority for some commodities, such legislation typically retained provisions for producers to receive refunds of their contributions upon request.

With the enabling legislation authorizing the National Dairy Promotion and Research Board, passed in 1983, Congress set the legislative precedent for mandatory, nonrefundable checkoff programs. Since then, many promotion organizations have sought and received the authority to collect nonrefundable assessments.

A variety of funding mechanisms, involving either mandatory or voluntary contributions from producers and/or processors, are in use at present. Table 4 classifies our respondents according to the funding authorities under which they operate. Table 5 lists the founding date for the first commodity promotion program for 15 major commodities and the date of the first federally mandated programs, where such exist, for these same commodities.

Table 4. Number of Organizations and Their Funding Basis, by Commodity Category

COMMODITY CATEGORY	FUNDING BASIS					TOTAL
	FEDERALLY MANDATED	STATE MANDATED	PROCESSOR CHECKOFF	VOLUNTARY CONTRIBUTIONS	OTHER	
GRAINS & OILSEEDS	0	13	1	2	2	18
DAIRY	31	20	1	5	1	58
FRUITS & NUTS	6	18	5	5	5	39
MEAT, POULTRY, SEAFOOD, & EGGS	8	3	1	3	3	18
VEGETABLES	4	5	1	2	1	13
FIBERS	4	0	0	2	1	7
OTHER	<u>1</u>	<u>2</u>	<u>2</u>	<u>2</u>	<u>1</u>	<u>8</u>
TOTAL	54	61	11	21	14	161 ^a

^aTotal is greater than 116 due to organizations with multiple funding bases.

Table 5. Date of Founding of the First Promotion Organization and of the First Federally Mandated Program, for Selected Commodities

COMMODITY	DATE OF	
	FIRST ORGANIZATION	FIRST FEDERALLY MANDATED PROGRAM ^a
SOYBEANS	1920	1990
WHEAT	1957	...
CORN	1978	...
DAIRY	1920	1983
CA TREE FRUITS	1933	...
ORANGE JUICE	1935	...
APPLES	1937	...
RAISINS	1949	...
WATERMELON	...	1985
BEEF	1922	1985
PORK	1967	1985
EGGS	1974	1974
POTATOES	1937	1971
COTTON	...	1966
HONEY	1952	1984

^aYear in which enabling legislation passed.

PROGRAM OBJECTIVES

Given the legal authority and the funds to conduct a promotion and research program, what objectives might we expect a typical organization to pursue, and what factors--parties involved in objective setting, commodity type, budget size, etc.--might affect the choice of objectives? A necessary precursor to any program evaluation effort is a well-defined objective to evaluate. To set the proper context in which to examine the methods employed for program evaluation it is necessary to first gain an understanding of the objective, or objectives, to be evaluated.

As Figure 1 shows, 84 percent of our respondents indicated that their producer board is involved in formulating program objectives. About 5 percent of our respondents indicated that their staffs alone set program objectives, and smaller percentages indicated that other approaches to objective setting are employed. Figure 2 indicates the types of information used when objectives are being formulated. The most frequently cited sources were general economic information about the commodity sector and information from consumer surveys, each of which was reported as being used by over two-thirds of our respondents. A smaller proportion, about one-third, reported using information from some type of econometric analysis. Many organizations indicated that the information which is incorporated into their objective-setting processes comes from multiple sources.

The rankings of objectives that our respondents reported, presented in Figure 3, provide some indication of the influence producers have on the objective setting process. Increasing commodity sales and maximizing producers' net returns were the most frequently indicated objectives, being ranked first or second by 62 percent and 56 percent of respondents, respectively. Changing consumer beliefs and attitudes about the commodity, presumably as a precursor to increased commodity sales, were ranked first or second by 35 percent and 34 percent of respondents, respectively.

FIGURE 1. PARTIES INVOLVED IN SETTING OBJECTIVES
(PERCENT OF RESPONDENTS, 116 TOTAL)

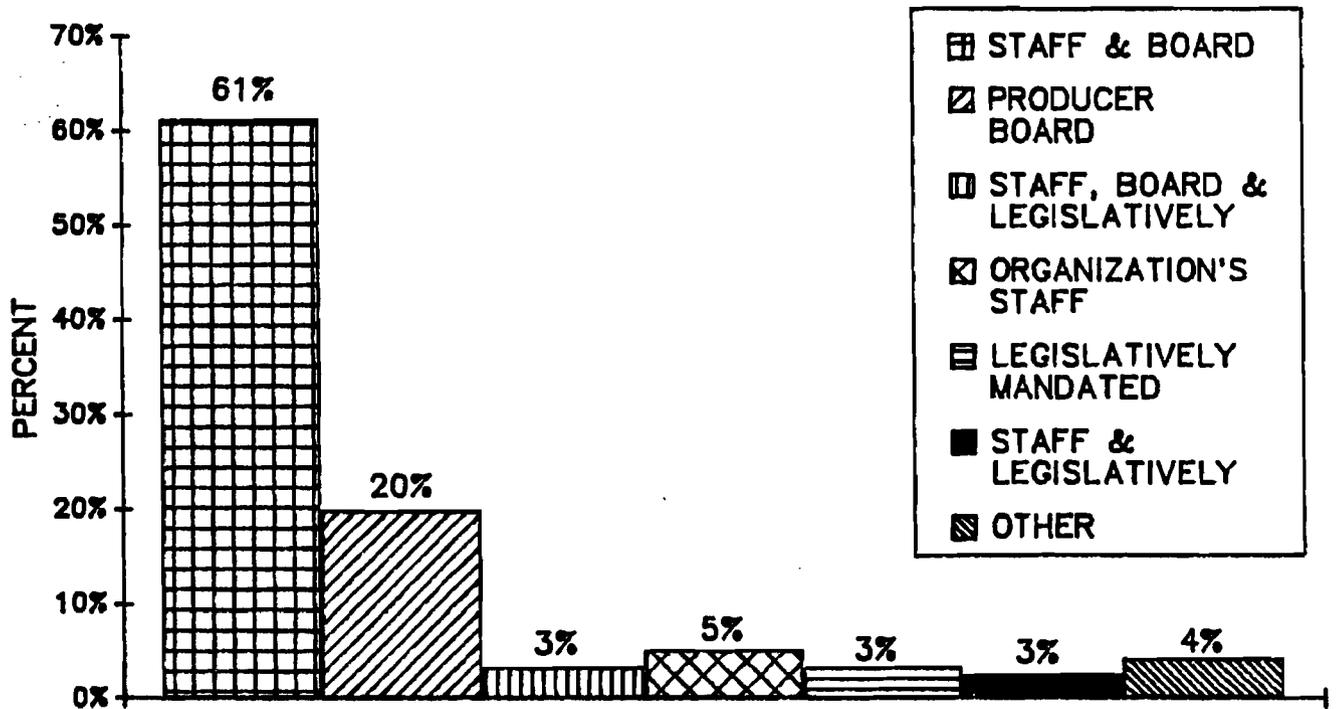


FIGURE 2. TYPES OF INFORMATION USED IN SETTING OBJECTIVES
(PERCENT OF RESPONDENTS, 116 TOTAL)

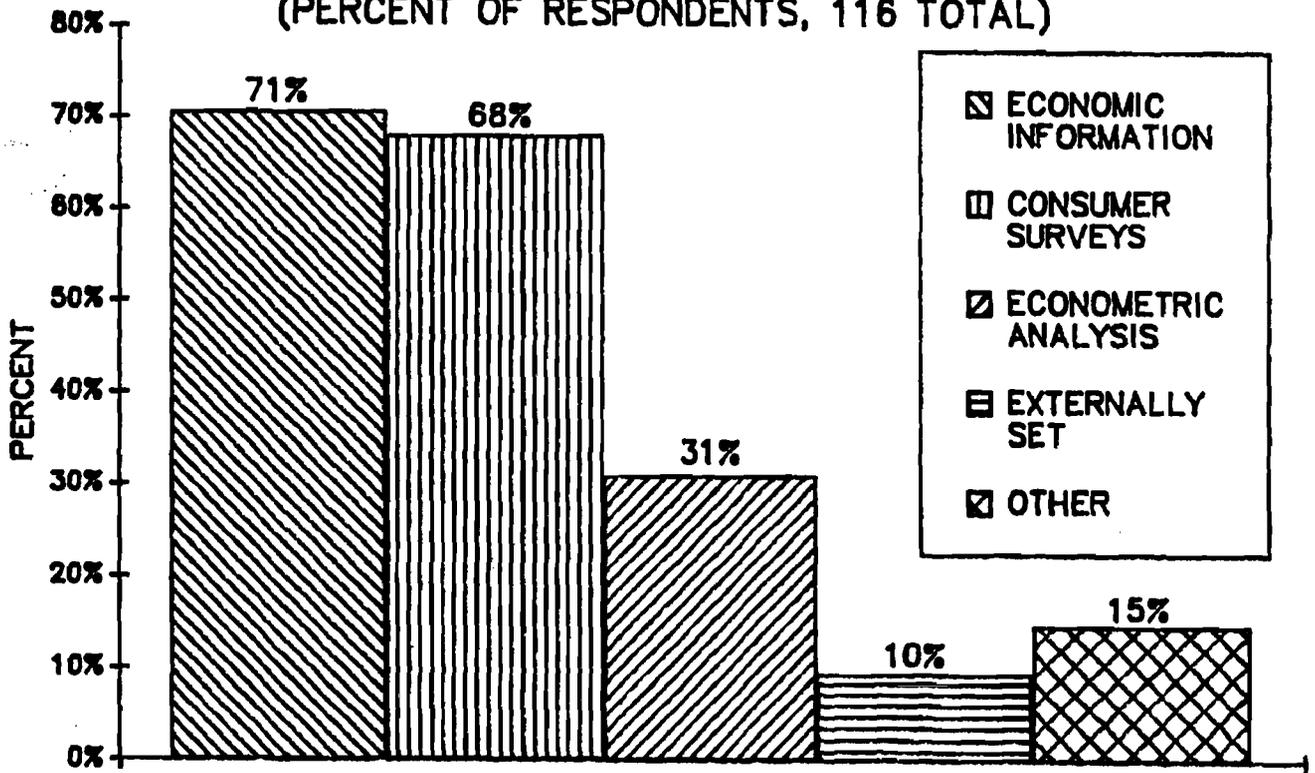
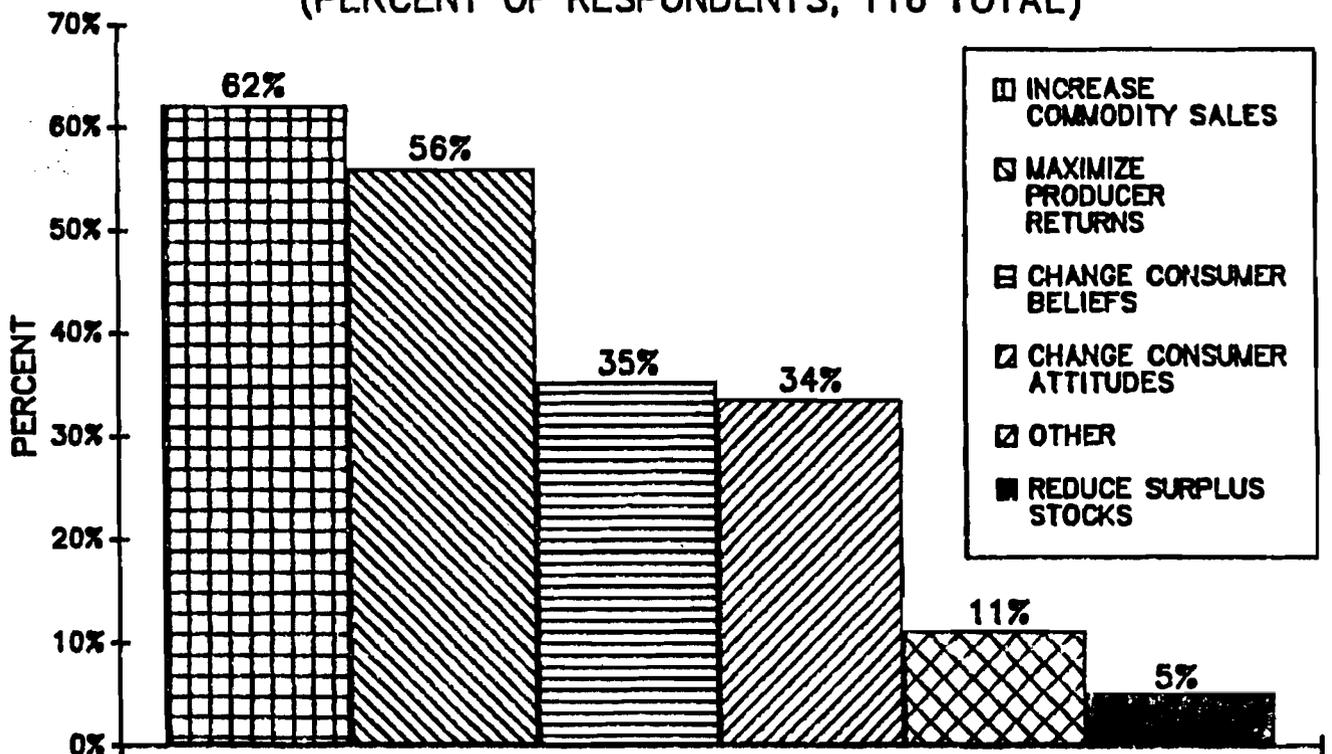


FIGURE 3. RESPONDENTS RANKING OBJECTIVES AS 1 OR 2
(PERCENT OF RESPONDENTS, 116 TOTAL)



As Table 6 indicates, this pattern of responses generally holds across commodity groupings. The exceptions are the MEAT, POULTRY, SEAFOOD AND EGGS and OTHER commodity categories, where a relatively greater emphasis is placed on changing consumer beliefs and attitudes about the commodity.

Table 6. Percent of Respondents Ranking Objectives as 1 or 2, by Commodity Category

OBJECTIVE	COMMODITY CATEGORY							ALL
	GRAINS & OILSEEDS	DAIRY	FRUITS & NUTS	MEAT, ETC.	VEGE- TABLES	FIBERS	OTHER	
	(% of respondents within commodity category)							
INCREASE AGGREGATE COMMODITY SALES	57	64	73	33	73	50	50	62
MAXIMIZE PRODUCER NET RETURNS	71	51	57	50	73	75	17	56
CHANGE CONSUMER BELIEFS	29	36	30	42	18	25	100	35
CHANGE CONSUMER ATTITUDES	29	41	23	58	9	25	50	34
REDUCE SURPLUS COMMODITY STOCKS	21	3	0	0	18	0	0	5
NUMBER OF ORGANIZATIONS	14	39	30	12	11	4	6	116

The objective rankings are categorized in Table 7 according to budget size. Organizations with budgets in excess of \$25 million most frequently ranked maximizing producer net returns as a primary or secondary objective, while those with budgets of \$500,000 or less most frequently ranked increasing commodity sales and changing consumer beliefs as primary or secondary objectives. Organizations in the intervening budget categories most frequently ranked increasing commodity sales and maximizing producer net returns as their primary or secondary objectives.

Table 7. Percent of Respondents Ranking Objectives as 1 or 2, by Budget Size

OBJECTIVE	ORGANIZATION BUDGET (\$ MILLIONS)						ALL
	<.5	.5-1	1-5	5-10	10-25	> 25	
	(% of organizations in budget category)						
INCREASE AGGREGATE COMMODITY SALES	68	58	69	70	42	44	62
MAXIMIZE PRODUCER NET RETURNS	39	68	60	40	58	89	56
CHANGE CONSUMER BELIEFS	58	26	26	30	33	22	35
CHANGE CONSUMER ATTITUDES	39	32	29	30	42	33	34
REDUCE SURPLUS COMMODITY STOCKS	0	16	9	0	0	0	5

NUMBER OF ORGANIZATIONS	28	19	35	10	12	9	116

MEDIA USAGE

Availability of funds is an important factor in determining whether or not a promotion organization uses paid media as part of its program. As Table 8 indicates, 65 percent of our respondents use one or more forms of paid media. Larger organizations are more likely to use all forms of paid media except radio, which is used by a relatively constant proportion of organizations regardless of budget size. Nearly half of all respondents with budgets under \$1 million use no paid media in their programs.

Table 8. Media Usage by Size of Budget

MEDIUM	ORGANIZATION BUDGET (\$ MILLIONS)						ALL
	<.5	.5-1	1-5	5-10	10-25	> 25	
	(% of organizations in group)						
TELEVISION	16	21	40	70	83	100	42
RADIO	32	42	51	30	58	44	43
PRINT	35	42	49	60	42	100	48
OUTDOOR	3	5	20	10	25	11	12
NO PAID MEDIA	52	47	37	10	17	0	35

NUMBER OF ORGANIZATIONS	28	19	35	10	12	9	116

BUDGETARY ALLOCATIONS

To examine how promotion organizations use their funds, our respondents were asked to provide information about how they allocate their total annual budgets among a list of 16 budget items. The responses are presented in two ways. Table 9 gives total expenditures on each item, grouping the organizations by commodity category, and Table 10 provides the percentage allocated to each item, grouping the organizations by budget size. It should be noted here that only the budgetary categories were supplied in the questionnaire, decisions as to appropriate categorizations of activities were left to the respondents.

Table 9. Total Expenditures Budgeted for Various Items, by Commodity Category

BUDGET ITEM	COMMODITY CATEGORY							TOTAL
	GRAINS & OILSEEDS	DAIRY	FRUITS & NUTS	MEAT, ETC.	VEGE- TABLES	FIBERS	OTHER	
	(\$MILLIONS)							
TV	7.1	89.8	71.1	48.8	1.7	17.5	0.0	236.0
RADIO	0.1	9.0	8.5	7.2	0.0	0.0	0.0	24.8
PRINT	3.8	15.2	10.4	23.6	7.0	1.7	0.1	61.9
BILLBOARDS	0.0	3.0	1.4	0.5	0.0	0.0	0.0	4.9
TRADE ADVERTISING	2.8	3.2	7.9	9.2	2.7	2.3	0.2	28.3
POINT OF PURCHASE	3.7	8.2	18.0	20.3	1.3	0.3	0.3	52.2
COUPONS	0.0	0.2	1.3	0.0	0.1	0.0	0.0	1.7
SWEEPSTAKES	0.0	3.3	4.4	0.1	0.7	0.1	0.3	8.9
NUTRITION EDUCATION	2.3	21.3	5.1	12.5	0.7	0.0	0.1	41.9
NUTRITION RESEARCH	0.4	5.5	2.1	6.5	0.2	0.0	0.0	14.7
NEW PRODUCT DEVELOPMENT	4.5	8.0	1.8	8.1	0.9	14.8	0.0	37.9
PUBLIC RELATIONS	2.8	9.4	32.7	11.9	2.1	0.8	1.2	61.0
PROGRAM EVALUATION	1.9	4.5	4.3	6.2	0.3	0.3	0.0	17.6
CONTRIBUTIONS TO OTHER ORGANIZATIONS	3.8	6.3	3.0	0.5	0.0	2.2	0.1	15.9
ADMINISTRATION	3.4	7.9	17.1	8.9	3.8	5.8	0.7	47.6
OTHER	<u>11.5</u>	<u>13.9</u>	<u>28.8</u>	<u>18.5</u>	<u>2.3</u>	<u>10.5</u>	<u>0.1</u>	<u>85.7</u>
TOTAL	48.0	208.9	217.9	182.9	23.9	56.4	3.1	741.0

Note: One organization with a total budget of \$11 million did not report any budgetary allocations and is not included in this table.

Table 10. Percentage Allocated to Various Budget Items, by Size of Total Budget

BUDGET ITEM	ORGANIZATION BUDGET (\$MILLIONS)						ALL
	<.5	.5-1	1-5	5-10	10-25	> 25	
	(Average % allocated to each item)						
TV	4	11	11	33	27	39	32
RADIO	5	3	5	2	6	2	3
PRINT	6	2	5	11	6	10	8
BILLBOARDS	0	0	1	2	1	0	1
TRADE ADVERTISING	3	6	5	5	2	4	4
POINT OF PURCHASE	6	9	4	10	10	6	7
COUPONS	0	0	1	0	0	0	0
SWEEPSTAKES	0	4	2	4	2	0	1
NUTRITION EDUCATION	7	16	16	5	5	4	6
NUTRITION RESEARCH	4	1	1	1	0	3	2
NEW PRODUCT DEVELOPMENT	2	4	2	2	2	8	5
PUBLIC RELATIONS	19	20	9	10	15	4	8
EVALUATION	1	1	2	2	2	3	2
CONTRIBUTIONS TO OTHER ORGANIZATIONS	6	3	13	0	2	1	2
ADMINISTRATION	24	15	12	8	5	5	6
OTHER	12	5	11	5	14	12	12

Note: Totals may not add to 100% due to rounding. The \$11 million organization not reporting budgetary allocations was left out of these calculations.

As Table 9 indicates, except for those organizations promoting OTHER commodities, television advertising is the budget item with the largest total allocation of funds. In each commodity grouping except OTHER, annual expenditures for television advertising exceeded \$1 million. DAIRY organizations reported the heaviest use of television, with combined expenditures of approximately \$90 million.

Print advertising, point of purchase promotions, and public relations are also items with large allocations. Overall, reported total expenditures on each of these items were in the \$50 million to slightly over \$60 million range. Significant expenditures were reported for the "other" budget category by organizations in most commodity groupings, providing some indication of the wide range of activities undertaken by promotion organizations and the difficulty of including all possible activities in any single list. Among the items included in the "other" category were industry, trade and producer communications, market research, foodservice promotions, production research, special projects, domestic and foreign market development, and merchandising programs.

Nutrition education and nutrition research are most heavily invested in by organizations in the MEAT, POULTRY, SEAFOOD, AND EGGS, and DAIRY commodity groupings. The growing consumer awareness of and concern over fat and cholesterol in the diet in recent years has likely provided the impetus for such expenditures.

The organizations in the FIBERS grouping reported the largest absolute expenditures for new product development. Organizations in the MEAT, POULTRY, SEAFOOD, AND EGGS and DAIRY commodity groupings also reported relatively large expenditures for new product development.

The total amounts allocated for program evaluation ranged from zero by those organizations in the OTHER commodity grouping to over \$6 million by those organizations in the MEAT, POULTRY, SEAFOOD, AND EGGS commodity grouping. The subject of program evaluation will be examined in more detail in the following section of this report.

Table 10 provides percentage allocations for the various budgetary items by organizations of different sizes. It appears that the smaller organizations have a different strategic program orientation than the larger organizations. Those with smaller budgets spend proportionally less on paid media, such as television and print advertising, and more on public relations and administration. Public relations is an effective means for smaller groups to get publicity and circulate information about their commodities within the confines of a limited budget.

As budget size increases, both the percentage and the absolute amount spent on television advertising increases. Spending on print advertising follows a similar pattern with both the percentage and absolute allocation increasing with increasing total budget.

In contrast to television and print advertising, the percentages allocated to radio advertising, trade advertising, nutrition research and program evaluation are relatively constant across budget size categories. Although these allocations are relatively constant in percentage terms, the total dollars allocated to these activities do increase with increasing budgets.

Some promotion organizations are able to leverage their limited funds by participating in federations of various types. One example of such an arrangement is the United Dairy Industry Association (UDIA). UDIA is an organization that undertakes a cooperative program of advertising production and also provides other services to its member organizations; it has no funding other than that contributed by member units. Services provided under such an arrangement allow some promotion organizations to undertake a more wide-ranging program than would appear possible based on the funds they have available.

PROGRAM EVALUATION

An important element of any commodity promotion activity is an evaluation conducted to determine whether or not the activity is achieving its intended effect. To gauge the extent of our respondents' evaluation activities, we asked them to provide information about the amount they budget for evaluation, the methods they use to evaluate particular objectives, and their usage of various types of consumer surveys.

Of the total program expenditures of \$752 million reported by our respondents, \$17.6 million (about 2 percent of total expenditures) was budgeted for program evaluation. While only 46 percent of our respondents reported program evaluation as a budgeted item, responses to a subsequent question relating evaluation methods to program objectives suggest that nearly 97 percent do undertake some form of program evaluation. Table 11 shows the distribution of organizations budgeting for and performing evaluation.

Table 11. Number of Organizations Budgeting for and Performing Evaluation

FUNDS BUDGETED FOR EVALUATION	EVALUATION UNDERTAKEN		TOTAL
	YES	NO	
YES:			
ORGANIZATIONS	51	2	53
(PERCENT)	(43.97)	(1.72)	
NO:			
ORGANIZATIONS	61	2	63
(PERCENT)	(52.59)	(1.72)	
TOTAL	112	4	116

The important effect of the level of financial resources on budgeting for program evaluation suggested by Table 12 is supported by a simple linear regression of evaluation expenditures on total budget. The result of this regression is the estimated equation

$$EVALEXP = -46865 + .031*BUDGET$$

(-1.72) (17.25)

where *EVALEXP* is total budgeted evaluation expenditures and *BUDGET* is total budget. The adjusted R^2 for this equation is .72 and the estimated *t*-values (the numbers in parentheses) indicate that both the intercept and *BUDGET* are significant at the .10 level. This estimated equation suggests that budgeting for evaluation requires a total budget of at least \$1.5 million.

Table 12. Evaluation Expenditures, by Budget Size

TOTAL BUDGET (\$MILLIONS)	% BUDGETING FOR EVALUATION	TOTAL EVALUATION EXPENDITURES (\$THOUSANDS)	TOTAL EXPENDITURES (\$THOUSANDS)	EVALUATION EXP. AS A % OF TOTAL
0 TO .5	26%	\$84	\$6,387	1%
.5 TO 1	26	126	13,900	1
1 TO 5	54	1,399	71,818	2
5 TO 10	50	977	66,699	1
10 TO 25	75	3,276	181,031	2
25 AND UP	78	<u>11,697</u>	<u>412,140</u>	3
ALL	46%	\$17,559	\$751,975	2%

No clear relationship exists between the type of commodity being promoted and budgeting for evaluation. As indicated in Table 13, with the exception of the FIBERS and OTHER commodity categories, approximately half of the organizations in any commodity category budget for program evaluation, with evaluation expenditures ranging from 1 to 4 percent of total expenditures.

Table 13. Evaluation Expenditures, by Commodity Category

COMMODITY CATEGORY	% BUDGETING FOR EVALUATION	TOTAL EVALUATION EXPENDITURES (\$THOUSANDS)	TOTAL EXPENDITURES (\$THOUSANDS)	EVALUATION EXP. AS A % OF TOTAL
GRAINS & OILSEEDS	50%	\$1,896	\$48,047	4%
DAIRY	44	4,505	208,856	2
FRUITS & NUTS	53	4,258	217,903	2
MEAT, POULTRY, SEAFOOD, & EGGS	50	6,278	193,854	3
VEGETABLES	55	275	23,867	1
FIBERS	25	345	56,379	1
OTHER	0	<u>0</u>	<u>3,070</u>	0
ALL	46%	\$17,557	\$751,976	2%

As to the specific types of analysis performed for particular objectives, our respondents indicated that they practice a variety of evaluation approaches depending on the size of their organizations and the objectives they are pursuing. For the objectives of increasing commodity sales and maximizing producers' net returns our respondents rely heavily on changes in sales as an indication of success (Tables 14 and 15). While such an approach may be an adequate indicator of success in a carefully designed analysis, we also included "econometric analysis" as a choice that we intended

to be used as a response indicating a more rigorous analysis, that is, one in which the effects of other explanatory factors can be explicitly controlled. The more rigorous analysis would provide an estimate of the net effect of advertising regardless of whether aggregate sales increased or decreased.

Table 14. Methods Used to Evaluate Objective of Increasing Commodity Sales (Objective Included in Rankings by 97 Organizations)

METHOD	ORGANIZATION BUDGET (\$MILLIONS)						ALL
	< .5	.5-1	1-5	5-10	10-25	> 25	
	(% of organizations in budget category using method)						
CONSUMER SURVEYS	11	31	30	22	57	75	30
ECONOMETRIC ANALYSIS	7	25	37	11	14	50	24
CHANGE IN SALES	70	94	67	89	86	100	78
OTHER	4	6	3	11	14	25	7
NO ANALYSIS	19	6	17	0	0	0	11

NUMBER OF ORGANIZATIONS	27	16	30	9	7	8	97

Note: Percentages may total more than 100 due to some organizations using multiple evaluation methods.

Table 15. Methods Used to Evaluate Objective of Maximizing Producer Net Returns (Objective Included in Rankings by 87 Organizations)

METHOD	ORGANIZATION BUDGET (\$MILLIONS)						ALL
	< .5	.5-1	1-5	5-10	10-25	> 25	
	(% of organizations in budget category using method)						
CONSUMER SURVEYS	5	24	4	0	14	25	10
ECONOMETRIC ANALYSIS	14	24	41	14	14	75	30
CHANGE IN SALES	48	59	52	71	71	38	54
OTHER	10	18	15	14	43	25	17
NO ANALYSIS	33	12	15	14	0	0	16

NUMBER OF ORGANIZATIONS	21	17	27	7	7	8	87

Note: Percentages may total more than 100 due to some organizations using multiple evaluation methods.

Based on the information presented in Tables 16 and 17, it appears that, regardless of program size, our respondents rely heavily on consumer surveys to evaluate the objectives of changing consumer beliefs and attitudes about their commodities. For these two objectives this type of analysis is clearly the best choice since it is difficult to assess the degree to which beliefs and attitudes are altered with any analysis based on secondary data.

Table 16. Methods Used to Evaluate Objective of Changing Consumer Beliefs
(Objective Included in Rankings by 102 Organizations)

METHOD	ORGANIZATION BUDGET (\$MILLIONS)						ALL
	< .5	.5-1	1-5	5-10	10-25	> 25	
	(% of organizations in budget category using method)						
CONSUMER SURVEYS	70	56	69	100	89	100	74
ECONOMETRIC ANALYSIS	17	17	10	0	11	25	14
CHANGE IN SALES	17	61	17	13	0	25	24
OTHER	7	6	10	0	0	0	6
NO ANALYSIS	17	11	10	0	11	0	11

NUMBER OF ORGANIZATIONS	30	18	29	8	9	8	102

Note: Percentages may total more than 100 due to some organizations using multiple evaluation methods.

Table 17. Methods Used to Evaluate Objective of Changing Consumer Attitudes
(Objective Included in Rankings by 101 Organizations)

METHOD	ORGANIZATION BUDGET (\$MILLIONS)						ALL
	< .5	.5-1	1-5	5-10	10-25	> 25	
	(% of organizations in budget category using method)						
CONSUMER SURVEYS	69	67	72	100	78	100	75
ECONOMETRIC ANALYSIS	10	17	10	0	11	25	12
CHANGE IN SALES	28	61	24	13	11	25	30
OTHER	3	11	7	0	0	0	5
NO ANALYSIS	14	6	3	0	11	0	7

NUMBER OF ORGANIZATIONS	29	18	29	8	9	8	101

Note: Percentages may total more than 100 due to some organizations using multiple evaluation methods.

For an objective of reducing surplus commodity stocks, which was included in the rankings of objectives by less than half of our respondents, no one evaluation method stands out as the method of choice. As indicated in Table 18, consumer surveys, econometric analysis, and change in sales are all used to varying degrees by organizations of different sizes to evaluate this objective.

Table 18. Methods Used to Evaluate Objective of Reducing Surplus Commodity Stocks (Objective Included in Rankings by 50 Organizations)

METHOD	ORGANIZATION BUDGET (\$MILLIONS)						ALL
	< .5	.5-1	1-5	5-10	10-25	> 25	
	(% of organizations in budget category using method)						
CONSUMER SURVEYS	8	15	6	0	100	50	12
ECONOMETRIC ANALYSIS	15	23	28	0	100	50	24
CHANGE IN SALES	46	62	39	33	0	50	46
OTHER	8	15	6	0	0	0	4
NO ANALYSIS	23	23	28	67	0	0	26

NUMBER OF ORGANIZATIONS	13	13	18	3	1	2	50

Note: Percentages may total more than 100 due to some organizations using multiple evaluation methods.

In an attempt to gain more insight into the influences of program size and objectives on the choice of evaluation methods, a set of logistic regressions was performed. In general, program size, as measured by total budget, was the only consistently significant explanatory variable. The apparent relationships among objectives and evaluation methods that could be inferred from Tables 14 through 18 are not as apparent in any of the logit models.

Table 19 contains estimated coefficients and summary statistics from one set of logistic regressions. In these equations the dependent variables took values of 0 or 1, indicating, respectively, nonuse or use of the particular evaluation method. The independent variables are organization budget, measured in millions of dollars, and objective rankings for five objectives, with a 1 being the highest ranking, a 5 being the lowest ranking, and a 6 indicating that the objective was not ranked.

Table 19. Logit Estimates for Choice of Evaluation Methods.

VARIABLE	PARAMETER ESTIMATE	STANDARD ERROR	CHI-SQUARE	PROB
Dependent variable: CONSUMER SURVEYS				
Independent variables:				
INTERCEPT	2.2800	1.4297	2.54	0.1108
BUD	0.1122	0.0583	3.70	0.0544
OBJ1	-0.0025	0.1383	0.00	0.9854
OBJ2	0.1743	0.1369	1.62	0.2029
OBJ3	-0.2873	0.2054	1.96	0.1619
OBJ4	-0.2579	0.2084	1.53	0.2157
OBJ5	0.1020	0.2044	0.25	0.6179
LIKELIHOOD RATIO			110.31	0.3677
Dependent variable: ECONOMETRIC ANALYSIS				
Independent variables:				
INTERCEPT	-0.2272	1.2393	0.03	0.8546
BUD	0.0393	0.0206	3.63	0.0569
OBJ1	-0.0986	0.1301	0.57	0.4485
OBJ2	-0.1507	0.1191	1.60	0.2060
OBJ3	-0.2287	0.1716	1.78	0.1828
OBJ4	0.5055	0.2006	6.35	0.0118
OBJ5	-0.0954	0.1945	0.24	0.6238
LIKELIHOOD RATIO			126.22	0.0879
Dependent variable: CHANGE IN SALES				
Independent variables:				
INTERCEPT	3.5393	1.5963	4.92	0.0266
BUD	0.0969	0.0521	3.46	0.0627
OBJ1	-0.4325	0.1375	9.89	0.0017
OBJ2	-0.0539	0.1349	0.16	0.6897
OBJ3	-0.2828	0.2330	1.47	0.2249
OBJ4	0.0573	0.2193	0.07	0.7938
OBJ5	0.0453	0.2173	0.04	0.8349
LIKELIHOOD RATIO			96.98	0.7231
Dependent variable: OTHER ANALYSIS				
Independent variables:				
INTERCEPT	-0.1298	1.5063	0.01	0.9313
BUD	-0.0107	0.0184	0.34	0.5621
OBJ1	-0.0719	0.1352	0.28	0.5951
OBJ2	-0.1628	0.1343	1.47	0.2253
OBJ3	0.1499	0.2077	0.52	0.4703
OBJ4	-0.0667	0.2037	0.11	0.7432
OBJ5	-0.2411	0.2066	1.36	0.2432
LIKELIHOOD RATIO			124.47	0.1063

Note: OBJ1=increase aggregate commodity sales; OBJ2=maximize producer net returns; OBJ3=reduce surplus commodity stocks; OBJ4=change consumer beliefs; and OBJ5=change consumer attitudes.

With the exception of the OTHER ANALYSIS equation, total budget (*BUD*) is significant at the .10 level. The positive coefficients on *BUD* indicate that organizations with larger budgets are more likely to use consumer surveys, econometric analysis, and change in sales for evaluating their programs. Organizations with larger budgets have more options to choose from and they need better information to make the optimum choices. The magnitude of loss from making incorrect program and program-allocation decisions is much larger for an organization with a large budget. Some might also argue that large-budget organizations invest more in evaluation because they have the money to do so.

With two exceptions, the objectives being pursued by the organization do not have a statistically significant impact on the probability of using particular evaluation methods. One exception is *OBJ4* (change consumer beliefs) in the ECONOMETRIC ANALYSIS equation, which indicates that the more highly ranked the objective of changing consumer beliefs (the lower its numerical value), the lower the probability of using econometric analysis as an evaluation method. If one is to determine the extent to which consumer beliefs are changing, consumers must be asked. This is done through consumer surveys of various types. The various types used will be discussed more in the next section. Collecting information about consumer beliefs is a necessary step to understanding and empirically measuring what is going on in the marketplace. However, only if the organization also conducts some form of economic analysis will it be able to determine if the change is a result of its program effort or because of some other factor at work in the marketplace. And, of course, this measure does not in itself indicate the extent of the sales impact of the promotion effort.

The second exception is *OBJ1* (increase aggregate commodity sales) in the CHANGE IN SALES equation, which indicates that the more highly ranked the objective of increasing aggregate commodity sales (the lower its numerical value), the greater the probability of using change in sales as an evaluation method. This is logical. Changes in sales must be monitored to understand how consumers are behaving. This is a necessary first step in monitoring consumer behavior. However, an increase in sales over time can occur because of price decreases for the commodity in question, changes in consumer purchasing abilities, and less competition from other commodities, for example. Some additional analysis is necessary to determine the extent to which the increase in sales resulted from the efforts of the promotion organization. More importantly, an observed decrease in sales could lead the organization's board of directors to conclude that their program was ineffective. Further analysis might indicate that the decrease was due to economic factors other than promotion even though the promotion program might have been very effective.

USE OF CONSUMER SURVEYS

In a well-designed promotion program, consumer surveys can be used to provide information about and guidance for a variety of program aspects. In addition to their use in *ex post* program evaluation, consumer surveys can, among other things, provide information for the objective-setting process, provide guidance for advertising development, be used to continuously monitor attitudes about advertising in use, and guide product-development efforts.

Nearly 70 percent of our respondents indicated that they use information from consumer surveys. Table 20 shows the percentages of organizations in the different budget size categories that use various types of consumer surveys. The information in this table suggests that, for all but mail surveys, there is a strong positive correlation between program size and the usage of the various types of consumer surveys. Given the costs involved in performing most types of consumer surveys, it is not surprising that the smaller organizations use them less frequently. It seems likely that some of the smaller organizations that indicated they use consumer surveys may in fact be using the results of consumer surveys that are performed by "parent" organizations or federated organizations of which they are members.

Table 20. Types of Surveys Used by the 80 Organizations Using Consumer Surveys

TYPE OF SURVEY	ORGANIZATION BUDGET (\$MILLIONS)						ALL USERS
	< .5	.5-1	1-5	5-10	10-25	> 25	
	(% of organizations in budget category)						
TRACKING STUDIES	29	8	67	33	89	100	53
FOCUS GROUPS	41	50	83	78	100	100	73
MALL INTERCEPTS	6	8	38	67	78	67	38
PHONE SURVEYS	41	50	42	67	56	89	53
MAIL SURVEYS	59	50	42	56	44	56	50
PERSONAL INTERVIEWS	35	50	38	22	56	67	43

NUMBER USING SURVEYS	17	12	24	9	9	9	80

The one exception to the general association of consumer survey usage with larger budgets is mail surveys. Mail surveys can be performed in a relatively low cost way, which may explain their more widespread use.

SUMMARY AND CONCLUSIONS

Our survey has highlighted several salient features of a majority of the generic commodity promotion organizations currently operating in the United States. The 116 responding organizations employed a total staff of 2,017 persons and invested over \$750 million in programs and administration in 1990. They represented 52 different commodities and had budgets ranging from a low of \$25,000 to a high of \$82 million. Although our survey does not include all of the organizations operating commodity promotion programs in the U.S., we believe that our respondents control about 80 percent of the total dollars being invested in U.S. agricultural commodity promotion activities.

The responses to our survey indicate that producer boards of directors are very much involved in formulating program objectives. Most of the promotion organizations place high priority on increasing aggregate commodity sales and on maximizing producer net returns. Some of the organizations also place high priority on changing consumer beliefs and attitudes. A few place high priority on moving surpluses of their commodity into commercial market channels, especially those representing vegetables, and grains and oilseeds.

Sixty-five percent of our respondents invested in media advertising in 1990. Organizations with large budgets tend to invest more in media advertising, while those with small budgets tend to invest a relatively larger percentage of their funds in public relations.

When we analyzed the data on evaluation, we found that less than 50 percent made specific budget allocations for program evaluation. On average, our respondents invested 2 percent of their budget in evaluation. However, 96 percent indicated that they evaluate their programs in some formal way. This probably means that evaluation is included as a part of a program activity or that the outside agencies that develop and implement the programs also do the evaluation.

Our respondents indicated that they use a variety of evaluation methods. Organizations with greater financial resources are more likely to include formal evaluation procedures in their budget than those with more limited means.

The evaluation methods our respondents reported using appear to be somewhat consistent with their objectives. However, of the possible relationships among objectives and methods, only two are statistically significant. The use of changes in sale as an evaluation method is closely linked to the objective of increasing aggregate commodity sales. And, those organizations that place high priority on changing consumer beliefs are less likely to use econometric methods to analyze success in achieving that objective.

These latter observations indicate that some organizations may need to do a thorough and systemic review of the way they set objectives, and even more importantly, the way they measure success in achieving them. Changes in sales or changes in consumer beliefs by themselves do not measure the extent to which the promotion effort causes the consumers to change their purchase behavior. The observed changes could be caused by other economic and social forces at work in the marketplace. Organizations that use some form of econometric analysis, or some other controlled experimental approach to evaluation, are more likely able to obtain a measure of the causal relationship between their promotion effort and the objective they wish to achieve. Those that combine econometric analysis with a mix of the other measures are likely to have a more comprehensive understanding of the role that their promotion program plays in changing consumer beliefs and attitudes, and subsequently behavior.

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APPENDIX: The Survey Instrument

Q-1 Depending on the organizational structure, a variety of groups may be involved in setting promotion program objectives. Among the groups involved in setting objectives may be the organization's staff, external producer boards, and legislators. Which of the following best describes the objective setting process for your organization's programs? (Circle the number of the most appropriate statement)

- 1 OBJECTIVES ARE SET BY THE ORGANIZATION'S STAFF
- 2 OBJECTIVES ARE SET BY A PRODUCER BOARD
- 3 OBJECTIVES ARE SET BY STAFF IN CONSULTATION WITH A PRODUCER BOARD
- 4 OBJECTIVES ARE LEGISLATIVELY MANDATED
- 5 OTHER (please specify _____
_____)

Q-2 As with the groups involved in setting program objectives, the types of information used in the objective setting process can be quite varied. Trends in per capita consumption, stock levels, and prices, results of previously sponsored consumer surveys, and results of previously sponsored econometric analyses are among the types of information incorporated into the objective setting process. Which of the following statements best describes the type, or types, of information used in determining your program's objectives? (Circle the number for all which apply)

- 1 GENERAL ECONOMIC INFORMATION ABOUT YOUR COMMODITY SECTOR
- 2 INFORMATION OBTAINED FROM CONSUMER SURVEYS
- 3 INFORMATION OBTAINED FROM ECONOMETRIC ANALYSES
- 4 OBJECTIVES ARE EXTERNALLY SET
- 5 OTHER (please specify _____
_____)

Q-3 Commodity promotion organizations pursue a variety of objectives, often more than one at a time. Please rank the following objectives from the perspective of your organization. (Use a 1 to indicate your primary objective, omit any which do not apply to your program)

- ___ INCREASE AGGREGATE COMMODITY SALES
- ___ MAXIMIZE PRODUCER NET RETURNS
- ___ REDUCE SURPLUS STOCKS OF THE COMMODITY
- ___ CHANGE CONSUMER BELIEFS (KNOWLEDGE) ABOUT THE COMMODITY
- ___ CHANGE CONSUMER ATTITUDES ABOUT THE COMMODITY
- ___ OTHER (please specify _____)

Q-4 The methods which commodity promotion organizations use to achieve their objectives are, perhaps, more varied than the objectives themselves. What percentage of your total budget is currently allocated to each of the following? (Omit any categories which do not apply, the total should be 100%)

- ___% TELEVISION ADVERTISING
- ___% RADIO ADVERTISING
- ___% PRINT ADVERTISING
- ___% BILLBOARD AND OTHER OUTDOOR ADVERTISING
- ___% TRADE ADVERTISING
- ___% POINT-OF-PURCHASE AND OTHER IN-STORE PROMOTIONS
- ___% COUPONS
- ___% SWEEPSTAKES AND CONTESTS
- ___% NUTRITION EDUCATION
- ___% HEALTH AND NUTRITION RESEARCH
- ___% NEW PRODUCT RESEARCH
- ___% PUBLIC RELATIONS
- ___% PROGRAM EVALUATION
- ___% CONTRIBUTIONS TO OTHER PROMOTION ORGANIZATIONS
- ___% PROGRAM ADMINISTRATION (INCLUDING SALARIES)
- ___% OTHER (please specify _____)

100% TOTAL

Q-5 Which of the following are emphasized in your current advertising?
 (Circle the types of advertising in which each emphasis is used, omit any emphasis which is not employed)

Emphasized in (Circle all that apply)
--

- | | | | | |
|---|---|-------------|-----------|-----------|
| 1 | Health and nutrition | .TV ADS | RADIO ADS | PRINT ADS |
| 2 | Taste | .TV ADS | RADIO ADS | PRINT ADS |
| 3 | Positive association
(i.e. celebrity endorsements) | .TV ADS | RADIO ADS | PRINT ADS |
| 4 | Product appearance. | .TV ADS | RADIO ADS | PRINT ADS |
| 5 | Fun and excitement. | .TV ADS | RADIO ADS | PRINT ADS |
| 6 | Product quality | .TV ADS | RADIO ADS | PRINT ADS |
| 7 | Convenience | .TV ADS | RADIO ADS | PRINT ADS |
| 8 | Other (please specify
_____). | . . .TV ADS | RADIO ADS | PRINT ADS |

Q-6 The methods used to determine whether or not program objectives are being met depend, in part, on what the objectives are. Which of the following methods does your organization use to determine if your objectives are being achieved? (Circle all methods that apply, omit objectives which do not apply to your program)

Methods used (Circle all that apply)

Increase aggregate commodity sales . . .	.CONSUMER SURVEYS	ECONOMETRIC ANALYSIS	CHANGE IN SALES	OTHER (specify _____)
Maximize producer net returns . . . . .	.CONSUMER SURVEYS	ECONOMETRIC ANALYSIS	CHANGE IN SALES	OTHER (specify _____)
Reduce surplus stocks of the commodity . . . . .	.CONSUMER SURVEYS	ECONOMETRIC ANALYSIS	CHANGE IN SALES	OTHER (specify _____)
Change consumers' beliefs about the commodity . . . . .	.CONSUMER SURVEYS	ECONOMETRIC ANALYSIS	CHANGE IN SALES	OTHER (specify _____)
Change consumers' attitudes about the commodity . . . . .	.CONSUMER SURVEYS	ECONOMETRIC ANALYSIS	CHANGE IN SALES	OTHER (specify _____)
Other (please specify _____) . . .	.CONSUMER SURVEYS	ECONOMETRIC ANALYSIS	CHANGE IN SALES	OTHER (specify _____)

Q-7 Does your organization use consumer surveys?

1 NO ----->

IF YOU DO NOT USE CONSUMER SURVEYS SKIP TO Q-9 BELOW

2 YES



(If you use consumer surveys)

Q-8 Of the following types of consumer surveys, which do you use and why? (Circle the number of each type used and indicate the purpose for which that type of survey is used in the space provided)

Reason for use:

1 TRACKING SURVEYS

2 FOCUS GROUPS

3 SHOPPING MALL INTERCEPTS

4 TELEPHONE SURVEYS

5 MAIL SURVEYS

6 PERSONAL INTERVIEWS

7 OTHER (please specify

_____)

Q-9 What additional information or analysis would you like to have to determine program effectiveness?

Finally, we would like to ask a few questions about your organization to help us interpret the results.

Q-10 What is the primary commodity covered by your organization's programs?

Q-11 Please list any additional commodities for which your organization operates promotion programs.

Q-12 What year was your program founded?

19 _____

Q-13 What is the total size of your organization's staff?

_____ persons

Q-14 How is your program funded? (Circle the number of each funding source that applies to your program, omit those which do not apply)

- 1 FEDERALLY MANDATED PRODUCER CHECK-OFFS
- 2 STATE MANDATED PRODUCER CHECK-OFFS
- 3 MANDATORY PROCESSOR CHECK-OFFS
- 4 VOLUNTARY CONTRIBUTIONS
- 5 OTHER (please specify _____)

Q-15 What is your organization's total budget for the current fiscal year?

\$ _____

The information gathered with this survey will be used in a manner which maintains the confidentiality of individual respondents. However, we would like your name and phone number so that we can contact you if we need any clarification or additional information.

(Name, please print)

(phone number)

Is there any other information you would like to share with us regarding the successful operation of commodity promotion programs? If so please use this space for that purpose.

Also, any comments you wish to make concerning how outside research could be made more useful for your organization will be appreciated, either here or in a separate letter.

Your contribution to this effort is greatly appreciated.

It is the policy of Cornell University actively to support equality of educational and employment opportunity. No person shall be denied admission to any educational program or activity or be denied employment on the basis of any legally prohibited discrimination involving, but not limited to, such factors as race, color, creed, religion, national or ethnic origin, sex, age or handicap. The University is committed to the maintenance of affirmative action programs which will assure the continuation of such equality of opportunity.

Other Agricultural Economics Research Publications

No. 90-9	Agricultural Risk Modeling Using Mathematical Programming	Richard N. Boisvert Bruce McCarl
No. 90-10	Organic Field Crop Production, A Review of the Economic Literature	Wayne A. Knoblauch Rebecca Brown Martin Braster
No. 90-11	Dairy Farm Management Business Summary, New York, 1989	Stuart F. Smith Wayne A. Knoblauch Linda D. Putnam
No. 90-12	Strategic Directions in Supermarket Deli/Prepared Foods	John W. Allen Edward W. McLaughlin Thomas R. Pierson
No. 90-13	Evaluation of Wine Trails in New York State	Brian Henehan Gerald B. White
No. 90-14	List of Available Agricultural Economics Publications July 1, 1989 - June 30, 1990	Dolores Walker
No. 90-15	A Social Accounting Matrix for Cameroon	Madeleine Gauthier Steve Kyle
No. 90-16	An Analysis of Consumer Trends and Employee Training in the U.S. Supermarket Delicatessen Industry	Gene German Gerald Hawkes
No. 91-1	The Feasibility of Producing and Marketing Fresh Vegetables in Central and Western New York	Raymond Barnes Gerald B. White
No. 91-2	1991 Budget Guide Estimated Prices for Crop Operating Inputs and Capital Investment Items	Darwin P. Snyder
No. 91-3	Meeting the Need: A Summary and Evaluation of NY FARMNET	John R. Brake Bill Phelan