MANAGEMENT OF DAIRY PRODUCTS AND UTILIZATION OF POINT-OF-PURCHASE ADVERTISING IN RETAIL FOOD STORES

TEXAS AGRICULTURAL MARKET RESEARCH & DEVELOPMENT CENTER

Department of Agricultural Economics
MANAGEMENT OF DAIRY PRODUCTS AND
UTILIZATION OF POINT-OF-PURCHASE
ADVERTISING IN RETAIL FOOD STORES

by

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THE TEXAS AGRICULTURAL MARKET
RESEARCH AND DEVELOPMENT CENTER

in cooperation with

Department of Agricultural Economics
The Texas Agricultural Experiment Station

Texas A&M University
College Station, Texas
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Robert E. Branson
Coordinator

ACKNOWLEDGEMENTS

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Summary and Highlights

This study reports the results of a survey of 504 retail food stores in five South Central states in June and July 1980. The purpose of the study was to evaluate the management of retail displays of dairy products and the use of June Dairy Month point-of-purchase (POP) promotion materials. The questionnaire was developed and field work conducted by the Southern Region Promotion Division of Associated Milk Producers, Inc. (AMPI). The data were tabulated and analyzed by the Texas Agricultural Market Research and Development Center at Texas A&M University.

A wide range of data describing the types of dairy product displays found, the nature of management practices and quality of displays is presented. Conventional "chest type" of display cases with shelves were found in over 90 percent of the stores surveyed. The traditional "coffin type" chest freezer was found in ice cream displays in nearly two-thirds of the stores. These percentages were found to vary somewhat by the Chainstore's distribution area. Seventeen percent of the stores surveyed had deli-cateessen sections.

Over 88 percent of the dairy cases in surveyed stores were judged to have a generally neat appearance. Organization of displays was not consistent with a many failing to capitalize on techniques known to reduce customer traffic congestion or promote customer inspection of all products in the dairy case. Pull dates were found to be exceeded in 1.8 percent of stores for whole milk, 3.4 percent for low-fat and 3.6 percent for buttermilk. Beer or wine were found in dairy cases in 3.4 percent of the stores. Approximately 80 to 90 percent of the stores had adequately stocked displays at the time of the interview.

In general, 73 percent of store managers interviewed believed that POP promotional materials were useful in generating sales. The June Dairy Month POP materials were found in 38 percent of the retail stores at the time of the interview (from two to 8 weeks after the display was to have been initiated). This varied by market area. Stores where independent installers were used had a higher frequency of POP material (58 percent). Where store personnel were responsible for putting up material the frequency was much lower (26 percent). The most frequently observed item was the mobile;
each of the three (milk, cheese and ice cream mobiles) were found in approximately 30 percent of the stores. In those stores displaying material it was generally found to be installed properly and in good condition.
Introduction

This report summarizes results of a survey planned and conducted by the Southern Region Promotion Division of Associated Milk Producers, Incorporated (AMPI). The survey was conducted primarily during the months of June and July, 1980, for the purpose of providing information about (a) installation and effectiveness of June Dairy Month instore, point-of-purchase advertising materials and (b) related marketing techniques used by regional grocery stores.

Objectives

The agreement between AMPI and the Texas Agricultural Market Research and Development Center (MRC) provided that the MRC analyze results of the AMPI field survey in order to:

1. Determine the installation rate of June Dairy Month in-store display materials.
2. Describe the use made of alternative display materials and the attractiveness of such materials.
3. Analyze management practices and attitudes relevant to the effectiveness of in-store promotion materials.

Procedures

Some preliminary consultation with AMPI personnel on formulation of the questionnaire to use in the survey was provided. However, the ultimate form of the questionnaire, as well as administration of the survey, was the responsibility of AMPI. A copy of the questionnaire used is shown in Appendix B.

Upon receiving the original, unedited field questionnaires, the MRC (a) edited, coded, and entered these data into the computer system at Texas A&M University, (b) verified the accuracy of the computerized data, and (c) carried out analyses in accordance with the above objectives. Over 500 computer tabulations were made on the data, all of which were made available to AMPI personnel.

The remainder of this report is organized as follows: First, a description of the sample stores is given, with emphasis on the dairy depart-
ment. Then selected management practices are explored, stressing the house­keeping, stocking, and maintenance practices applicable to the dairy depart­ments. This is followed by an analysis of awareness and opinions about point­of-purchase (POP) promotional materials. Finally, utilization of the June Dairy Month POP materials in 1980 is examined.

Description of Sample

General Descriptive Data

The survey included stores located in six states (Texas, New Mexico, Oklahoma, Kansas, Arkansas, and Tennessee) and associated with 36 distinct food retailing organizations. A total of 504 food stores were surveyed by AMPI. A basic, pre-selected sample consisted of 307 stores. This was sup­plemented by random visitations to 197 additional stores. The total sample of 504 stores was used for deriving the results in the report (Appendix Table 1).

The promotional activities of AMPI are organized around designated "market areas", which are identified by the names of prominent cities within these areas. There were 17 market areas represented in this survey. These are given in Appendix Table 2, along with frequencies of representation by stores within each market area.

The stores may also be classified according to the geographic outreach of the food retailing organizations with which they are associated. The four main classifications used are national, interstate, intrastate, and metro stores. These were arbitrarily classified with national referring to chains with stores in most areas of the country while interstate were those having stores in more than one state but not national in scope. Intrastate were those with stores only in one state but not confined to a single met­ropolitan area. Metro were those where the retailing firm was confined to one metropolitan area. National and intrastate stores dominate the sample with a combined total of 73.4 percent of all stores interviewed (Table 1). A fifth, somewhat distinct classification is also shown: convenience stores. However, since only 1 percent of the sample was made up of these convenience stores, information collected on them is not adequate to make valid infer­ences from the data (Table 1).
Another useful classification is according to the size of individual stores. Stores with more than 25,000 square feet of floor space comprised 40.9 percent of the sample (Table 2). Stores of more than 6,000 square feet comprised 87.5 percent of the sample, leaving only 12.5 percent of the stores with 6,000 square feet or less.

Table 1  Frequency of Sampling Within Designated Classifications of Parent Retail Organizations.

<table>
<thead>
<tr>
<th>Classification</th>
<th>Share of Stores</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>---percent---</td>
</tr>
<tr>
<td>National</td>
<td>31.7</td>
</tr>
<tr>
<td>Interstate</td>
<td>13.7</td>
</tr>
<tr>
<td>Intrastate</td>
<td>41.7</td>
</tr>
<tr>
<td>Metro</td>
<td>11.9</td>
</tr>
<tr>
<td>Convenience</td>
<td>1.0</td>
</tr>
<tr>
<td></td>
<td>100.0</td>
</tr>
</tbody>
</table>

Source: Survey Data, Summer 1980

Table 2  Frequency of Sampling According to Estimated Square Feet of Floor Space in Stores.

<table>
<thead>
<tr>
<th>Size Class</th>
<th>Share of Stores</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>---percent---</td>
</tr>
<tr>
<td>1,000 sq. ft. &amp; smaller</td>
<td>3.8</td>
</tr>
<tr>
<td>1,001 - 6,000 sq. ft.</td>
<td>8.7</td>
</tr>
<tr>
<td>6,001 - 25,000 sq. ft.</td>
<td>46.6</td>
</tr>
<tr>
<td>25,001 sq. ft. &amp; larger</td>
<td>40.9</td>
</tr>
<tr>
<td></td>
<td>100.0</td>
</tr>
</tbody>
</table>

Source: Survey Data, Summer 1980
Dairy Products Departments

There are two major types of dairy cases. The "conventional" dairy case consists of upright refrigerated shelves which have no coverage in front so that the various diary products may be simply lifted off. These cases often have doors or curtains behind the shelves which may be opened for re-stocking. Alternatively, the dairy case may be an upright case with doors (usually glass) which seal the case much like a home refrigerator.

Ice cream cases are also of two major types. The conventional "coffin" type is simply a chest type freezer, with or without coverings for the top, which lets the customer reach down into the case for the ice cream. The other type of ice cream case is essentially identical to the upright case with doors described above. It is necessary to keep ice cream cases colder than general-purpose dairy cases in order to prevent thawing.

The frequency by types of dairy and ice cream cases is summarized in Table 3. The conventional dairy case dominates, comprising over 90 percent of the total. The conventional ice cream case is also dominant, but less so, with almost 64 percent of all ice cream cases being this type (Table 3).

Comparison of frequencies of dairy and ice cream cases across the different classes of stores reveals some differences. Thus, almost 99 percent of all dairy cases in the national store chains are the conventional type. Interstate chains' dairy cases are about 94 percent of the conventional type. The dominance within intrastate and metro stores is somewhat less, about 85-87 percent (Table 4).

The pattern among the classes of stores is somewhat similar for use of ice cream cases. The national stores are again the largest users of the conventional cases, with over 81 percent being this type. The interstate, intrastate, and metro stores are somewhat smaller in their use of the conventional cases, with 53-67 percent being this type (Table 5).

Cheese products are often displayed in various places in the stores. About 17 percent of the stores surveyed had delicatessen sections in which cheeses were sold, while four percent had cheese and wine sections. Additional detail on cheese products is given in the following discussion of management practices.
Table 3  Frequencies of Alternative Types of Dairy Cases and Ice Cream Cases.

<table>
<thead>
<tr>
<th>Type</th>
<th>Dairy Cases</th>
<th>Ice Cream Cases</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conventional type</td>
<td>90.3</td>
<td>63.7</td>
</tr>
<tr>
<td>Upright w/doors</td>
<td>8.9</td>
<td>28.6</td>
</tr>
<tr>
<td>Other</td>
<td>0.8</td>
<td>7.7</td>
</tr>
</tbody>
</table>

Source: Survey Data, Summer 1980

Table 4  Frequencies of Alternative Types of Dairy Cases, According to Store Classifications.

<table>
<thead>
<tr>
<th>Type</th>
<th>National</th>
<th>Interstate</th>
<th>Intrastate</th>
<th>Metro</th>
<th>Conventional</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conventional Type</td>
<td>98.8</td>
<td>94.2</td>
<td>85.2</td>
<td>86.7</td>
<td>20.0</td>
</tr>
<tr>
<td>Upright w/doors</td>
<td>0.0</td>
<td>5.8</td>
<td>14.3</td>
<td>11.7</td>
<td>80.0</td>
</tr>
<tr>
<td>Other</td>
<td>1.2</td>
<td>0.0</td>
<td>0.5</td>
<td>1.6</td>
<td>0.0</td>
</tr>
</tbody>
</table>

Source: Survey Data, Summer 1980

Table 5  Frequencies of Alternative Types of Ice Cream Cases, According to Store Classifications.

<table>
<thead>
<tr>
<th>Type</th>
<th>National</th>
<th>Interstate</th>
<th>Intrastate</th>
<th>Metro</th>
<th>Conventional</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conventional Type</td>
<td>81.3</td>
<td>53.6</td>
<td>53.8</td>
<td>66.7</td>
<td>20.0</td>
</tr>
<tr>
<td>Upright w/doors</td>
<td>8.7</td>
<td>43.5</td>
<td>36.7</td>
<td>31.7</td>
<td>80.0</td>
</tr>
<tr>
<td>Other</td>
<td>10.0</td>
<td>2.9</td>
<td>9.5</td>
<td>1.6</td>
<td>0.0</td>
</tr>
</tbody>
</table>

Source: Survey Data, Summer 1980
Management Practices

Interviewers observed several specified display case housekeeping-maintenance practices as well as stocking practices followed by the management of each store visited. These were mostly subjective, visual observations.

Dairy Cases

Housekeeping Practices

Several housekeeping practices observed in dairy cases are summarized in Table 6. Over 88 percent of all dairy cases were judged to have a generally neat appearance. However, the functional layout of dairy cases often left substantial room for improvement. Approximately 63 percent of the dairy cases were organized according to product categories; the others usually having all products of each particular brand name grouped together. Failure to organize displays by product categories makes it more difficult for consumers to evaluate and choose among the alternatives available. Also, only about 48 percent of the dairy cases had high volume items (esp. milk and eggs) at opposite ends of the dairy cases. Putting these at opposite ends helps alleviate congestion around the dairy case and tends to promote inspection of all items in the dairy case (Table 6).

Cleanliness is a constant challenge in dairy cases, as minor leakage and spillage are typical. About one-third of the shelves on which the milk was displayed were judged to be clean and about one-third of the dairy cases exhibited clean grating on bottom shelves. However, 10.5 percent of the dairy cases were not designed with this grating (Table 6); therefore, about 37 percent of the dairy cases that had grating were observed to be clean.

Only 16.5 percent of the dairy cases had dividers between layers of products (Table 6). While most conventional dairy cases have separate shelves for milk and other larger containers for dairy products, the bottom shelf is often stacked by store personnel in order to maximize the proportion of the inventory accommodated by the case. Smaller items, (such as sour cream, yogurt, cottage cheese, etc.) are also stacked in layers usually not more than two or three containers deep. Dividers were relatively more evident in the market areas of El Paso, Corpus Christi, Wichita, and Little Rock.
Table 6  Selected Housekeeping and Stocking Practices Pertaining to Dairy Cases.

<table>
<thead>
<tr>
<th>Type of Practice</th>
<th>Share of Stores</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td>Dairy case neat</td>
<td>88.3</td>
</tr>
<tr>
<td>Display organized by product categories</td>
<td>62.7</td>
</tr>
<tr>
<td>High-volume items in opposite ends of case</td>
<td>48.2</td>
</tr>
<tr>
<td>Shelf under milk clean</td>
<td>34.5</td>
</tr>
<tr>
<td>Grating on bottom shelf clean</td>
<td>33.3</td>
</tr>
<tr>
<td>Dividers between layers of products</td>
<td>16.5</td>
</tr>
<tr>
<td>Front doors closed</td>
<td>9.5</td>
</tr>
<tr>
<td>Rear door or curtains closed</td>
<td>45.0</td>
</tr>
<tr>
<td>Electrical wires concealed</td>
<td>95.6</td>
</tr>
</tbody>
</table>

**Stocking**

<table>
<thead>
<tr>
<th>Stocking</th>
<th>Share of Stores</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pull-dates on milk readable</td>
<td>85.9</td>
</tr>
<tr>
<td>All whole milk still fresh</td>
<td>87.9</td>
</tr>
<tr>
<td>All lowfat milk still fresh</td>
<td>81.5</td>
</tr>
<tr>
<td>All buttermilk still fresh</td>
<td>78.7</td>
</tr>
<tr>
<td>Imitation white milk present</td>
<td>7.9</td>
</tr>
<tr>
<td>Imitation chocolate milk present</td>
<td>10.7</td>
</tr>
<tr>
<td>Beer or wine present</td>
<td>3.4</td>
</tr>
</tbody>
</table>

Source: Survey Data, Summer 1980
Front doors on the dairy cases were observed to be open in 4.3 percent of the stores (Table 6). However, since 85.7 percent of the cases did not have front doors, this translates to about 29.4 percent of the cases with doors having the doors open, resulting in unnecessary energy losses. Likewise, 47.6 percent of the dairy cases did not have either doors or curtains in the rear (Table 6). Therefore, the fact that rear doors or curtains were observed to be open in 6.8 percent of the stores means that about 13 percent of existing rear doors or curtains were left open.

There were no exposed electrical wires in 95.6 percent of the dairy cases (Table 6). This already high percentage should be even closer to 100 percent, because exposed electrical wires are not just unsightly -- they pose a potential danger to customers.

Readings of temperature gauges on dairy cases indicated temperatures of 32°F or lower (which, if accurate, suggests a possible threat to fluid and cultured dairy foods) in 63 percent of the stores. Readings of 42°F or lower occurred in over 93 percent of the stores. There were only minor variations in these readings across the alternative classes of stores considered (Table 7). Apparently, the dairy cases in convenience stores -- which are predominantly the upright-with-doors type -- are kept colder than

<table>
<thead>
<tr>
<th>Temperature Range</th>
<th>All Stores</th>
<th>National</th>
<th>Interstate</th>
<th>Intrastate</th>
<th>Metro</th>
<th>Convenience</th>
</tr>
</thead>
<tbody>
<tr>
<td>27°F or lower</td>
<td>42.4</td>
<td>26.9</td>
<td>46.4</td>
<td>47.1</td>
<td>58.3</td>
<td>100.0</td>
</tr>
<tr>
<td>28°F to 32°F</td>
<td>20.6</td>
<td>27.5</td>
<td>27.5</td>
<td>17.1</td>
<td>8.3</td>
<td>0.0</td>
</tr>
<tr>
<td>33°F to 37°F</td>
<td>15.5</td>
<td>17.5</td>
<td>15.9</td>
<td>14.8</td>
<td>13.3</td>
<td>0.0</td>
</tr>
<tr>
<td>38°F to 42°F</td>
<td>14.9</td>
<td>19.4</td>
<td>7.2</td>
<td>14.8</td>
<td>13.3</td>
<td>0.0</td>
</tr>
<tr>
<td>43°F to 47°F</td>
<td>2.6</td>
<td>3.7</td>
<td>1.5</td>
<td>1.4</td>
<td>5.0</td>
<td>0.0</td>
</tr>
<tr>
<td>48°F or higher</td>
<td>4.0</td>
<td>5.0</td>
<td>1.5</td>
<td>4.8</td>
<td>1.7</td>
<td>0.0</td>
</tr>
</tbody>
</table>

1/ Temperature recorded in Fahrenheit

Source: Survey Data, Summer 1980
Table 8  Stocking Levels Relative to Shelf Space for Selected Products in the Dairy Case.

<table>
<thead>
<tr>
<th>Product</th>
<th>Empty</th>
<th>Low</th>
<th>Adequate</th>
<th>Over-Stocked</th>
<th>No Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Whole Milk</td>
<td>0.4</td>
<td>11.7</td>
<td>83.9</td>
<td>3.8</td>
<td>0.2</td>
</tr>
<tr>
<td>Lowfat Milk</td>
<td>0.8</td>
<td>17.0</td>
<td>79.4</td>
<td>2.4</td>
<td>0.4</td>
</tr>
<tr>
<td>Yogurt</td>
<td>2.0</td>
<td>15.3</td>
<td>81.7</td>
<td>0.2</td>
<td>0.8</td>
</tr>
<tr>
<td>Cottage Cheese</td>
<td>1.4</td>
<td>16.9</td>
<td>80.5</td>
<td>0.2</td>
<td>1.0</td>
</tr>
<tr>
<td>Sour Cream</td>
<td>1.0</td>
<td>10.5</td>
<td>87.3</td>
<td>0.6</td>
<td>0.6</td>
</tr>
<tr>
<td>Cream</td>
<td>3.6</td>
<td>14.5</td>
<td>80.5</td>
<td>0.4</td>
<td>1.0</td>
</tr>
<tr>
<td>Butter</td>
<td>1.2</td>
<td>8.3</td>
<td>88.3</td>
<td>0.8</td>
<td>1.4</td>
</tr>
</tbody>
</table>

Source: Survey Data, Summer 1980
the other stores (Table 7). But, as previously emphasized, the small number of convenience stores surveyed makes conclusions about them difficult.

Stocking Practices

The pull-dates stamped on dairy cartons indicate when the products are no longer considered to be fresh. These dates were judged to be readable in almost 86 percent of the dairy cases. Observations on pull-dates for whole milk, lowfat milk and buttermilk were made; however, no answer was recorded in several instances (Table 6). Whole milk was verified to be fresh in only 87.9 percent of the stores with pull-dates exceeded in 1.8 percent and no answer in 10.3 percent. The percentage dropped to 81.5 percent for lowfat milk and dropped again to 78.8 percent for buttermilk. Pull-dates were exceeded in 3.4 percent of the stores for lowfat milk and in 3.6 percent for buttermilk. The higher percentages for lowfat milk and buttermilk may reflect either the lower turnover of these items or the absence of them in some dairy cases. Probably both explanations apply.

About 8 percent of the dairy cases stocked imitation white milk and almost 11 percent had imitation chocolate milk. Beer or wine were included in the dairy cases by 3.4 percent of the stores (Table 6).

Stocking levels of selected dairy case products relative to available shelf space are summarized in Table 8. An "adequate" notation was given when dairy case shelves were 80-100 percent full while "overstocked" was indicated when products were covering return air vents or sitting in the aisle. Approximately 80-90 percent of all products were adequately stocked. Lowfat milk and cottage cheese were most frequently understocked, while whole milk and lowfat milk were the only products exhibiting a slight tendency to be overstocked from time to time (Table 8).

Cheese Displays

Use of alternative store locations for displaying cheese are indicated in Table 9. The most common locations are in a separate cheese case (49.6 percent of the stores) and in the dairy case (45.0 percent of the stores). Cheese was stocked in only one location in the store about 69 percent of the time, in two locations about 25 percent of the time, and in three or more locations about five percent of the time. These other locations included delicatessens, cheese/wine boutiques, meat counters, etc. (Table 9).
Stocking levels were observed to be adequate in more than 86 percent of the stores. Imitation cheese products were on display with the cheeses in almost 78 percent of the stores (Table 9).

Cheese display areas were judged to be clean in almost 88 percent of the stores. However, expanded or moldy cheese was visible in 29 percent of the stores (Table 9).

Table 9  Selected Housekeeping and Stocking Practices Pertaining to Cheese Displays.

<table>
<thead>
<tr>
<th>Display and Stocking Practices</th>
<th>Yes</th>
<th>No</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cheese displayed in:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Separate cheese case</td>
<td>49.6</td>
<td>50.4</td>
<td>--</td>
</tr>
<tr>
<td>Meat counter</td>
<td>15.1</td>
<td>84.9</td>
<td>--</td>
</tr>
<tr>
<td>Delicatessen</td>
<td>17.1</td>
<td>82.9</td>
<td>--</td>
</tr>
<tr>
<td>Dairy Case</td>
<td>45.0</td>
<td>55.0</td>
<td>--</td>
</tr>
<tr>
<td>Cheese/wine boutique</td>
<td>4.0</td>
<td>96.0</td>
<td>--</td>
</tr>
<tr>
<td>Other</td>
<td>4.0</td>
<td>96.0</td>
<td>--</td>
</tr>
<tr>
<td>Nothing (not displayed)</td>
<td>1.2</td>
<td>98.8</td>
<td>--</td>
</tr>
<tr>
<td>One location</td>
<td>68.6</td>
<td>31.4</td>
<td>--</td>
</tr>
<tr>
<td>Two locations</td>
<td>25.0</td>
<td>75.0</td>
<td>--</td>
</tr>
<tr>
<td>Three locations</td>
<td>4.6</td>
<td>95.4</td>
<td>--</td>
</tr>
<tr>
<td>Four locations</td>
<td>0.6</td>
<td>99.4</td>
<td>--</td>
</tr>
<tr>
<td>Stocking level adequate</td>
<td>86.3</td>
<td>13.5</td>
<td>0.2</td>
</tr>
<tr>
<td>Imitation cheese products present</td>
<td>77.8</td>
<td>22.0</td>
<td>0.2</td>
</tr>
<tr>
<td>Cheese display areas clean</td>
<td>87.9</td>
<td>11.1</td>
<td>1.0</td>
</tr>
<tr>
<td>Expanded or moldy cheese visible</td>
<td>29.2</td>
<td>69.8</td>
<td>1.0</td>
</tr>
</tbody>
</table>

Source: Survey Data, Summer 1980
Ice Cream Cases

About 73 percent of the ice cream cases were noted as having a neat appearance while the shelf under the ice cream was judged to be clean in only 33.5 percent of the stores. No answer was given on this for 22.4 percent of the stores (Table 10). Perhaps the reason for so many "no answer" situations is that the coffin type ice cream cases were often too full to permit observation.

Evidence of thawed or melted ice cream was found in over 57 percent of the ice cream cases (Table 10). Readings of the case temperature gauges, where possible, revealed only 2.4 percent of the ice cream cases registered 21\degree\ F or warmer with 92.5 percent of them registering 0\degree\ F or below (Table 11). Ice cream thawing may be due to inefficiencies of cooling in open-top cases, redistribution of ice cream by customers, temporary overstocking of cases, etc.

Vanilla ice cream stocks were observed to be adequate (i.e., 90-100 percent full) in over 80 percent of the stores. For frozen novelties, stocking levels were adequate in almost 79 percent of the stores (Table 10).

Table 10  Selected Housekeeping and Stocking Practices Pertaining to Ice Cream Cases.

<table>
<thead>
<tr>
<th>Practice</th>
<th>Yes</th>
<th>No</th>
<th>No Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ice cream case neat</td>
<td>72.8</td>
<td>25.4</td>
<td>1.8</td>
</tr>
<tr>
<td>Shelf under ice cream clean</td>
<td>33.5</td>
<td>44.1</td>
<td>22.4</td>
</tr>
<tr>
<td>Evidence of thawed or melted ice cream</td>
<td>57.3</td>
<td>40.3</td>
<td>2.4</td>
</tr>
<tr>
<td>Stocking level adequate for:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vanilla ice cream</td>
<td>80.2</td>
<td>17.8</td>
<td>2.0</td>
</tr>
<tr>
<td>Frozen novelties</td>
<td>78.6</td>
<td>18.0</td>
<td>3.4</td>
</tr>
</tbody>
</table>

Source: Survey Data, Summer 1980
Table 11  Temperature Readings in Ice Cream Cases, for All Stores and for Alternative Classifications.

<table>
<thead>
<tr>
<th>Temperature</th>
<th>All Stores</th>
<th>National</th>
<th>Interstate</th>
<th>Intrastate</th>
<th>Metro</th>
<th>Convenience</th>
</tr>
</thead>
<tbody>
<tr>
<td>-20 or lower</td>
<td>66.3</td>
<td>60.0</td>
<td>62.3</td>
<td>69.5</td>
<td>75.0</td>
<td>80.0</td>
</tr>
<tr>
<td>-21 to -10</td>
<td>12.7</td>
<td>16.9</td>
<td>10.1</td>
<td>9.5</td>
<td>16.7</td>
<td>0.0</td>
</tr>
<tr>
<td>-11 to 0</td>
<td>13.5</td>
<td>13.1</td>
<td>17.4</td>
<td>14.8</td>
<td>5.0</td>
<td>20.0</td>
</tr>
<tr>
<td>1 to 10</td>
<td>3.0</td>
<td>4.4</td>
<td>4.4</td>
<td>1.4</td>
<td>3.3</td>
<td>0.0</td>
</tr>
<tr>
<td>11 to 20</td>
<td>2.2</td>
<td>2.5</td>
<td>1.5</td>
<td>2.9</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>21 to higher</td>
<td>2.4</td>
<td>3.1</td>
<td>4.3</td>
<td>1.9</td>
<td>0.0</td>
<td>0.0</td>
</tr>
</tbody>
</table>

1/ Temperature recorded in Fahrenheit
Source: Survey Data, Summer 1980

Opinions About Point-Of-Purchase

The term "point-of-purchase materials" refers to graphic advertising materials placed in the store to attract attention at the location where consumers decide whether or not to select a product for purchase. Such materials may take the form of posters, stickers, mobiles, banners, tags, pamphlets, etc.

Several questions were asked of food store managers to elicit their opinions about point-of-purchase (POP) materials in general and the June Dairy Month materials supplied by the American Dairy Association (ADA) in particular. Also, some indications were obtained about their general awareness of availability and variety of POP materials.

POP Materials in General

Over 73 percent of the store managers believed that POP promotional materials were useful in generating sales (Table 12). Some reasons given for not using POP materials were: (1) clutters store, company policy against them, people do not notice them, etc. (mentioned by 9 percent of managers)
and (2) must be in correct place and in good taste or they will not help (mentioned by seven percent of managers).

Less than 22 percent of the managers indicated an awareness of any contests or prizes for supermarket personnel who develop POP displays for certain products (Table 12). Many of those who had been aware of such contests or prizes could not recall who had sponsored them. The only sponsors mentioned (by eight percent of the managers) were local food handlers or brokers. But almost 55 percent indicated that they would be willing to become involved in a contest that offered a $100 prize for the best cheese display (Table 12). There were, however, two major conditions: (1) would depend on approval from the district office (mentioned by 14.5 percent of managers) and (2) must not cause too much bother (mentioned by 5.6 percent of managers).

Table 12 General Attitudes and Awareness About POP Materials.

<table>
<thead>
<tr>
<th>Attitude</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Believes that POP materials help sales</td>
<td>Yes</td>
</tr>
<tr>
<td>Aware of Contests for best POP displays</td>
<td>73.2</td>
</tr>
<tr>
<td>Would be involved in contest paying $100 for best cheese display</td>
<td>21.6</td>
</tr>
<tr>
<td>Would use pads of dairy recipes if made available</td>
<td>54.6</td>
</tr>
<tr>
<td>POP materials put up by:</td>
<td></td>
</tr>
<tr>
<td>Store employee</td>
<td>35.9</td>
</tr>
<tr>
<td>Someone else</td>
<td>38.5</td>
</tr>
<tr>
<td>Both</td>
<td>25.6</td>
</tr>
</tbody>
</table>

Source: Survey Data, Summer 1980
Almost 82 percent of the managers indicated that they would make use of dairy recipe pads if they were available (Table 12). Qualifying comments indicated that the recipe pads must be attractively designed to go in a convenient place; e.g., on bulletin board or in consumer center (mentioned by nine percent of managers).

In response to a question about the store's policy about who puts up POP materials, an approximately equal number of managers (35-40 percent) indicated that store personnel did it or that someone else besides store personnel did it, while slightly over 25 percent of them said that both store personnel and others could do it (Table 12). Apparently, if a sponsoring organization wanted to do the installation there would be no objections from about 75 percent of the stores.

**June Dairy Month Materials**

About 22 percent of the store managers said they believed that the June Dairy Month POP materials had increased sales of dairy products. About 12 percent said they believed they had not increased sales, with no answer given by almost 66 percent of the managers (Table 13). The primary reason for so many "no-response" answers is that—as will be made clear in the next section—almost 62 percent of the stores had never installed the POP materials for June Dairy Month. Therefore, they had no basis for an opinion. However, 4.5 percent of the managers did comment that it was impossible for them to measure any impact the POP materials may have on sales. Also, about six percent said that the materials did not last long enough to determine an impact and/or that the materials needed improvement in design and durability.

When asked if they would use a larger quantity of the POP materials furnished by ADA, 22 percent of the managers again responded affirmatively. However, almost 18 percent said they would not and 60 percent gave no answer (Table 13). Some comments were that the materials would have to be altered, that more mobiles would be welcomed, that all materials except the mobiles would be used, etc.
Table 13  Attitudes and Awareness About June Dairy Month POP Materials.

<table>
<thead>
<tr>
<th>Attitude</th>
<th>Yes</th>
<th>No</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Believe that POP materials have increased sales of dairy products</td>
<td>22.2</td>
<td>12.1</td>
<td>65.7</td>
</tr>
<tr>
<td>Would use more of the POP materials if they were available</td>
<td>22.2</td>
<td>17.7</td>
<td>60.1</td>
</tr>
</tbody>
</table>

Source: Survey Data, Summer 1980

Use of Point-Of-Purchase Materials

One of the important areas of interest in the survey was to determine the usage patterns for point-of-purchase (POP) advertising material provided to retail stores. This included an inventory of materials which were found in each store and an assessment of the appropriateness of their placement within the store and selected appearance factors.

POP materials were to be placed in three different areas of the store; dairy case, cheese case and ice cream case. The POP kit includes 10 pieces relating to products usually found in the dairy case, three pieces for the cheese case and one for ice cream. These pieces were of four types: mobiles to be hung from the ceiling, rail strips and wag-tags to be attached to the rail or shelf under the product and general purpose banners.

Dairy Case

Installation

Of the 504 stores, 61.9 percent had no dairy case materials displayed at the time of the interview. Approximately seven percent of the stores had all ten pieces displayed while 27 percent had six or more pieces. Eleven percent displayed from one to five pieces (Table 14). If a store had
Table 14  Frequency and Amounts of Dairy Case POP Materials Found in Sample Stores.

<table>
<thead>
<tr>
<th>Number of Pieces</th>
<th>Share of Stores ---percent---</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>61.9</td>
</tr>
<tr>
<td>1</td>
<td>1.6</td>
</tr>
<tr>
<td>2</td>
<td>1.2</td>
</tr>
<tr>
<td>3</td>
<td>2.2</td>
</tr>
<tr>
<td>4</td>
<td>2.0</td>
</tr>
<tr>
<td>5</td>
<td>4.0</td>
</tr>
<tr>
<td>6</td>
<td>5.4</td>
</tr>
<tr>
<td>7</td>
<td>4.6</td>
</tr>
<tr>
<td>8</td>
<td>6.1</td>
</tr>
<tr>
<td>9</td>
<td>4.6</td>
</tr>
<tr>
<td>10</td>
<td>6.5</td>
</tr>
</tbody>
</table>

Source: Survey Data, Summer 1980

any material at all, there were typically several pieces used. The most frequently observed item was the milk mobile which appeared in 30 percent of the stores (Table 15). The butter mobile, rail strips and banners were found in 25 to 30 percent of the stores, with the wag tags appearing in 20 to 23 percent.

The frequency of appearance varied greatly among the 18 market areas checked. Three areas (Tulsa, Little Rock and Ft. Smith) showed more than 90 percent of the stores with no materials. Only five market areas (Albuquerque, El Paso, Memphis, Houston and Tyler) had some materials appearing in more than one-half of the stores checked. It should be noted that all of the stores in the sample were scheduled to have received materials.

Approximately 36 percent of store managers interviewed indicated that store employees install point-of-purchase materials. Of those stores 74 percent had no dairy case POP material displayed. Of the stores where
someone other than store employees put up POP material approximately 42 percent had no dairy case material at the time of the interview. It confirms the conventional wisdom that depending on store employees to install the material is not a good way of insuring that it will be used.

Table 15  Frequency of Appearance of Dairy Case POP Materials in Sample Stores.

<table>
<thead>
<tr>
<th>Dairy Case POP Item</th>
<th>Share of Stores Displaying</th>
</tr>
</thead>
<tbody>
<tr>
<td>Milk mobile</td>
<td>30</td>
</tr>
<tr>
<td>Butter mobile</td>
<td>28</td>
</tr>
<tr>
<td>Rail Strips</td>
<td></td>
</tr>
<tr>
<td>&quot;Calcium&quot;</td>
<td>30</td>
</tr>
<tr>
<td>&quot;Teeth&quot;</td>
<td>28</td>
</tr>
<tr>
<td>&quot;Bones&quot;</td>
<td>28</td>
</tr>
<tr>
<td>Wag tags</td>
<td></td>
</tr>
<tr>
<td>Milk</td>
<td>20</td>
</tr>
<tr>
<td>Butter</td>
<td>21</td>
</tr>
<tr>
<td>Cottage Cheese</td>
<td>23</td>
</tr>
<tr>
<td>Banners</td>
<td></td>
</tr>
<tr>
<td>Milk case</td>
<td>26</td>
</tr>
<tr>
<td>Butter</td>
<td>25</td>
</tr>
</tbody>
</table>

Source: Survey Data, Summer 1980

Condition and Location

In those stores where the dairy case POP materials were found, it was usually installed properly and in good condition (Table 16). The one major problem was that the case banners in the 42 percent of the stores where they appeared were not folded correctly to give them a three-dimensional appearance.

The height and location of milk and butter mobiles were also evaluated. In most cases they were hung at the proper height (7-10 ft.) but in about
20 percent of the stores they were hung higher than 10 feet (Table 17). In over 90 percent of the stores these mobiles were hung out over the aisle and not over the dairy case itself.

Table 16  Selected Observation Regarding Condition and Appearance of Dairy Case POP Materials.

<table>
<thead>
<tr>
<th>Observation</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td>--percent--</td>
<td></td>
</tr>
<tr>
<td>1. General appearance is clean and attractive</td>
<td>94</td>
</tr>
<tr>
<td>2. Enhances dairy case decor</td>
<td>81</td>
</tr>
<tr>
<td>3. Case banners attached with magnets</td>
<td>93</td>
</tr>
<tr>
<td>4. Case banners in proper places</td>
<td>94</td>
</tr>
<tr>
<td>5. Case banners folded properly</td>
<td>58</td>
</tr>
<tr>
<td>6. Rail strips properly placed in milk section</td>
<td>93</td>
</tr>
<tr>
<td>7. Waz tags placed under proper products</td>
<td>91</td>
</tr>
</tbody>
</table>

Source: Survey Data, Summer 1980

Table 17  Height of Milk, Butter, Cheese and Ice Cream Mobiles Installed in Retail Stores.

<table>
<thead>
<tr>
<th>Height</th>
<th>Shares of Stores</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>milk mobile</td>
</tr>
<tr>
<td>Under 7 feet</td>
<td>10 8 8 4</td>
</tr>
<tr>
<td>7-10 feet</td>
<td>72 71 67 66</td>
</tr>
<tr>
<td>Over 10 feet</td>
<td>18 21 25 30</td>
</tr>
</tbody>
</table>

Source: Survey Data, Summer 1980
Cheese Case

Installation

Approximately the same number of stores (37 percent) were found to have cheese POP material as those which displayed dairy case material (38 percent). Those which had cheese POP material were equally divided among those displaying 1, 2 or all 3 available pieces (Table 18).

Table 18  Frequency and Amount of Cheese POP Materials Found in Sample Stores

<table>
<thead>
<tr>
<th>Number of Pieces of Cheese POP</th>
<th>Share of Stores</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>---percent---</td>
</tr>
<tr>
<td>0</td>
<td>62.9</td>
</tr>
<tr>
<td>1</td>
<td>11.3</td>
</tr>
<tr>
<td>2</td>
<td>12.9</td>
</tr>
<tr>
<td>3</td>
<td>12.9</td>
</tr>
</tbody>
</table>

Source: Survey Data, Summer 1980

The cheese mobile was the most frequently used (30 percent) while the cheese wag tag was least (20 percent). Combinations of the three pieces appeared in a smaller share of the stores checked. The effect of personnel installing material was the same as observed for dairy case material. A lower share of stores were found to display the cheese POP among those stores where the manager indicated that store personnel put up the material.

Frequency of installation varied among market areas in a similar pattern to that described earlier for dairy case POP. The range was from no stores displaying materials in Lubbock to 100 percent of stores sampled in Memphis and 81 percent of stores in Albuquerque.

Condition and Location

The appearance of the cheese POP material was observed to be clean and attractive in nearly all (96 percent) of the stores where it was used. The
range in cheese mobile height was about the same as that noted for milk and butter mobiles (Table 17).

Ice Cream Cases

The only ice cream POP material supplied in the kit was a mobile. It was in place in about 28 percent of the stores surveyed and, similarly to the other material, was more likely to be observed in stores where someone other than store employees did the installation. The ice cream mobile appeared in more than 50 percent of sample stores in three market areas (Albuquerque, El Paso and Memphis). It appeared in less than 10 percent of the stores in five market areas, most of which were the same as those listed earlier for dairy and cheese POP.

The ice cream mobiles seen were in good condition in over 90 percent of the instances. It was hung over the aisle in about 75 percent of the stores and at the appropriate height (7 to 10 ft) in two-thirds of them.

Summary

Two main points should be emphasized. First, the POP materials were found in less than 40 percent of the retail stores. In those stores where the materials were installed, more than half of the individual items were used and they were generally found to be placed properly and in good condition. Significant variation occurred among market areas in the percent of stores displaying the POP materials and there was also a positive association with the use of persons other than store employees as installers.
Table A-1  Frequency of Various Food Retailing Organizations Included in the AMPI Survey, Summer 1980.

<table>
<thead>
<tr>
<th>Store Name</th>
<th>Basic Sample</th>
<th>Supplemental Sample</th>
<th>Total Sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>Skaggs</td>
<td>2.2</td>
<td>1.2</td>
<td>3.4</td>
</tr>
<tr>
<td>Albertson's</td>
<td>2.0</td>
<td>0.4</td>
<td>2.4</td>
</tr>
<tr>
<td>Smith's</td>
<td>1.4</td>
<td>1.0</td>
<td>2.4</td>
</tr>
<tr>
<td>Full's</td>
<td>0.8</td>
<td>1.4</td>
<td>2.2</td>
</tr>
<tr>
<td>Safeway</td>
<td>11.7</td>
<td>9.3</td>
<td>21.0</td>
</tr>
<tr>
<td>Piggly Wiggly</td>
<td>1.6</td>
<td>0.4</td>
<td>2.0</td>
</tr>
<tr>
<td>Food City</td>
<td>0.4</td>
<td>0.0</td>
<td>0.4</td>
</tr>
<tr>
<td>Winn-Dixie</td>
<td>3.4</td>
<td>0.2</td>
<td>3.6</td>
</tr>
<tr>
<td>Tom's</td>
<td>0.0</td>
<td>0.4</td>
<td>0.4</td>
</tr>
<tr>
<td>Happy</td>
<td>0.4</td>
<td>0.2</td>
<td>0.6</td>
</tr>
<tr>
<td>Humpty Dumpty</td>
<td>1.0</td>
<td>1.2</td>
<td>2.2</td>
</tr>
<tr>
<td>Fleming</td>
<td>3.0</td>
<td>3.2</td>
<td>6.2</td>
</tr>
<tr>
<td>Affiliated</td>
<td>7.1</td>
<td>3.2</td>
<td>6.2</td>
</tr>
<tr>
<td>Family</td>
<td>0.6</td>
<td>0.6</td>
<td>1.2</td>
</tr>
<tr>
<td>Weingarten</td>
<td>2.8</td>
<td>2.2</td>
<td>5.0</td>
</tr>
<tr>
<td>Kroger</td>
<td>2.2</td>
<td>1.0</td>
<td>3.2</td>
</tr>
<tr>
<td>Brookshire Brothers</td>
<td>0.8</td>
<td>0.2</td>
<td>1.0</td>
</tr>
<tr>
<td>Big Star</td>
<td>0.6</td>
<td>0.0</td>
<td>0.6</td>
</tr>
<tr>
<td>Dillon's</td>
<td>0.0</td>
<td>0.8</td>
<td>0.8</td>
</tr>
<tr>
<td>IGA</td>
<td>0.0</td>
<td>3.6</td>
<td>3.6</td>
</tr>
<tr>
<td>Minyard's</td>
<td>1.8</td>
<td>0.0</td>
<td>1.8</td>
</tr>
<tr>
<td>J.R. Beadel</td>
<td>1.2</td>
<td>0.0</td>
<td>1.2</td>
</tr>
<tr>
<td>H.E.B.</td>
<td>5.6</td>
<td>1.0</td>
<td>6.2</td>
</tr>
<tr>
<td>Tom Thumb</td>
<td>1.6</td>
<td>0.0</td>
<td>1.6</td>
</tr>
<tr>
<td>Handy Andy</td>
<td>2.0</td>
<td>0.2</td>
<td>2.2</td>
</tr>
<tr>
<td>Eagle (or Lucky)</td>
<td>1.2</td>
<td>0.6</td>
<td>1.8</td>
</tr>
<tr>
<td>Super Duper</td>
<td>0.4</td>
<td>0.4</td>
<td>0.8</td>
</tr>
<tr>
<td>Stanley</td>
<td>0.2</td>
<td>0.8</td>
<td>1.0</td>
</tr>
</tbody>
</table>

CONT.
<table>
<thead>
<tr>
<th>Store Name</th>
<th>Basic Sample</th>
<th>Supplemental Sample</th>
<th>Total Sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dick's</td>
<td>0.2</td>
<td>0.2</td>
<td>0.4</td>
</tr>
<tr>
<td>Gerland's</td>
<td>1.4</td>
<td>1.2</td>
<td>2.6</td>
</tr>
<tr>
<td>Foodtown</td>
<td>0.0</td>
<td>0.4</td>
<td>0.4</td>
</tr>
<tr>
<td>Lewis &amp; Coker</td>
<td>0.4</td>
<td>0.4</td>
<td>1.0</td>
</tr>
<tr>
<td>Randall's</td>
<td>0.6</td>
<td>0.4</td>
<td>1.0</td>
</tr>
<tr>
<td>Jack &amp; Jill</td>
<td>0.2</td>
<td>0.4</td>
<td>0.6</td>
</tr>
<tr>
<td>Brookshires Grocery</td>
<td>2.4</td>
<td>2.0</td>
<td>4.4</td>
</tr>
<tr>
<td>Other</td>
<td>0.0</td>
<td>0.8</td>
<td>0.8</td>
</tr>
</tbody>
</table>

---percent---
Table A-2  Frequency of Sampling Within Designated AMPI Market Areas, Summer 1980.

<table>
<thead>
<tr>
<th>Market Area</th>
<th>Basic Sample</th>
<th>Supplemental Sample</th>
<th>Total Sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>---percent---</td>
<td>---percent---</td>
<td></td>
<td>---percent---</td>
</tr>
<tr>
<td>Albuquerque, NM</td>
<td>3.0</td>
<td>2.2</td>
<td>5.2</td>
</tr>
<tr>
<td>El Paso, TX</td>
<td>2.0</td>
<td>3.4</td>
<td>5.4</td>
</tr>
<tr>
<td>Oklahoma City, OK</td>
<td>6.0</td>
<td>6.5</td>
<td>12.5</td>
</tr>
<tr>
<td>Tulsa, OK</td>
<td>5.9</td>
<td>5.0</td>
<td>10.9</td>
</tr>
<tr>
<td>Little Rock, AR</td>
<td>2.8</td>
<td>0.4</td>
<td>3.2</td>
</tr>
<tr>
<td>Fort Smith, AR</td>
<td>0.8</td>
<td>1.6</td>
<td>2.4</td>
</tr>
<tr>
<td>Memphis, TN</td>
<td>1.6</td>
<td>0.0</td>
<td>1.6</td>
</tr>
<tr>
<td>Wichita, KS</td>
<td>0.4</td>
<td>6.4</td>
<td>6.8</td>
</tr>
<tr>
<td>Arlington, TX</td>
<td>10.7</td>
<td>0.4</td>
<td>11.1</td>
</tr>
<tr>
<td>Austin, TX</td>
<td>5.2</td>
<td>0.0</td>
<td>5.2</td>
</tr>
<tr>
<td>Corpus Christi, TX</td>
<td>1.6</td>
<td>0.2</td>
<td>1.8</td>
</tr>
<tr>
<td>Houston, TX</td>
<td>9.7</td>
<td>8.5</td>
<td>18.2</td>
</tr>
<tr>
<td>Lubbock, TX</td>
<td>0.6</td>
<td>0.2</td>
<td>0.8</td>
</tr>
<tr>
<td>Midland, TX</td>
<td>3.0</td>
<td>0.8</td>
<td>3.8</td>
</tr>
<tr>
<td>San Antonio, TX</td>
<td>3.6</td>
<td>0.4</td>
<td>4.0</td>
</tr>
<tr>
<td>Tyler, TX</td>
<td>4.2</td>
<td>2.0</td>
<td>6.2</td>
</tr>
<tr>
<td>Dodge City, KS</td>
<td>0.0</td>
<td>1.2</td>
<td>1.2</td>
</tr>
</tbody>
</table>

TOTAL  60.9  39.1  100.0

Source: Survey Data, Summer 1980
DCI MERCHANDISING SURVEY

Staff Code ________________________

Date ________________________________

Address ____________________________

City/State/Zip _______________

Day of Week _______________

Time of Day ____________

If ADA point of purchase material is not installed, do not do questions in boxes.

I. STORE MANAGER

Introduce yourself to the store manager or assistant manager as follows:

"I am ____________________________, a ____________________________ with the Dairy Council. We are doing a survey of 1900 supermarkets for the American Dairy Association who recently placed some point of purchase (POP) material in your store. ADA will use the information from this survey to improve its services to supermarkets. I would like to check your dairy and frozen food cases and ask you to answer these short questions about point of purchase material. Your answers and the information on this survey will be confidential and will be averaged with the responses from other supermarkets in this state.

A. Do you feel point of purchase (POP) materials are useful in generating sales? (ie. Kraft cheese materials, Del Monte canned fruits, in Texas, TAP)

   1. yes
   2. no

   Comments:

B. Are you aware of any contests or prizes for supermarket personnel who develop point of purchase displays for certain products?

   3. yes
   4. no

   Who:

C. Would you become involved in a contest that offered a $100 prize for the best cheese display?

   5. yes
   6. no

   Comments:

D. Do you feel that the American Dairy Association point of purchase material has increased sales of dairy products since they were installed?

   7. yes
   8. no

   Comments:

E. Who puts the POP materials up in your store?

   9. Store Employee
   10. Someone else

F. Would you use a greater quantity of these ADA POP materials if they were available? (ie. 5 more wag tags, 2 more milk case banners, etc.)

   11. yes
   12. no

   Comments:

G. If pads of dairy recipes were available, would you use them?

   13. yes
   14. no
H. To the nearest thousand feet, what is the square footage of _____ sq. ft. this store? (If the manager does not know, give the number of check out stands.)

For purposes of this survey, the dairy case is the refrigerated case where fluid milk, butter, sour cream, yogurt and other items such as yeast and pickled herring are displayed. (Cheese may be located in this case or displayed elsewhere).

A. What type of dairy case is this? .......................... 15. conventional

B. Can the top of this case be used to display ....... 17. yes

C. Check the pieces displayed ................................. 19. milk mobile

D. How high is the milk mobile hung above the floor?..... 29. under 7 ft.
(Use your own height to help determine this)

E. Where is the milk mobile hung? ......................... 32. over the case

F. How high is the butter mobile hung above the floor?... 34. under 7 ft.

G. Where is the butter mobile hung? ....................... 37. over the case

H. Are the case banners attached with magnets? ........... 39. yes

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>What type of dairy case is this?</td>
</tr>
<tr>
<td>B</td>
<td>Can the top of this case be used to display?</td>
</tr>
<tr>
<td>C</td>
<td>Check the pieces displayed</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
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<tr>
<td></td>
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<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>D</td>
<td>How high is the milk mobile hung above the floor?</td>
</tr>
<tr>
<td></td>
<td>(Use your own height to help determine this)</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>E</td>
<td>Where is the milk mobile hung?</td>
</tr>
<tr>
<td>F</td>
<td>How high is the butter mobile hung above the floor?</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>G</td>
<td>Where is the butter mobile hung?</td>
</tr>
<tr>
<td>H</td>
<td>Are the case banners attached with magnets?</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
I. Are the top of the case banners displayed close to the proper products?  41. yes
   42. no
J. Are the case banners folded to achieve a three-dimensional effect?  43. yes
   44. no
K. Are the rail strips displayed in the milk section?  45. yes
   46. no
L. Are the wag tags displayed over or under the appropriate products?  47. yes
   48. no
M. Is the general appearance of the point of purchase material clean and attractive?  49. yes
   50. no
N. Does the ADA point of purchase material enhance the dairy case decor?  51. yes
   52. no
O. Is other point of purchase material (such as shelf talkers or price tags) present?  53. yes
   54. no

HOUSEKEEPING AND STOCKING
A. Do you consider this dairy case to be neat?  55. yes
   56. no
B. Is the shelf under the milk as clean as you would keep your kitchen?  57. yes
   58. no
C. Is there any evidence of leaking milk containers?  59. yes
   60. no
D. Can you read the product pull dates on half gallon cartons of milk?  61. yes
   62. no
E. What pull dates do you see on the following private brand products?

<table>
<thead>
<tr>
<th>Product</th>
<th>Earliest</th>
<th>Latest</th>
</tr>
</thead>
<tbody>
<tr>
<td>whole milk, 1/2 gal.</td>
<td>63.</td>
<td>64.</td>
</tr>
<tr>
<td>lowfat milk, 1/2 ga.</td>
<td>65.</td>
<td>66.</td>
</tr>
<tr>
<td>buttermilk, quart</td>
<td>67.</td>
<td>68.</td>
</tr>
<tr>
<td>only</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
F. Is the grating at the front of the bottom shelf dirty? ...... ____________ 69. yes
   (dirty= dried milk or food, dust and other UFO's) ____________ 70. no
   ____________ 71. NA, no grating

G. Are there any exposed wires on the front edge of the dairy case near the floor? ...... ____________ 72. yes
   ____________ 73. no

H. Are there any torn metal edges on the dairy case that might injure someone? ...... ____________ 74. yes
   ____________ 75. no

I. Are there dividers between the layers of dairy products? .... ____________ 76. yes
   ____________ 77. no

J. If there are dividers between layers of dairy products, are there holes to allow air circulation? ____________ 78. yes
   ____________ 79. no
   ____________ 80. NA, no dividers

K. If there are doors at the front of the case are they closed? ____________ 81. yes
   ____________ 82. no
   ____________ 83. NA, no doors

L. If there are doors or curtains behind the shelves, are they closed? ____________ 84. yes
   ____________ 85. no
   ____________ 86. NA, no doors

M. Is imitation white "milk" present in the dairy case? .......... ____________ 87. yes
   ____________ 88. no

N. Is (imitation) chocolate "milk" present in the dairy case? .... ____________ 89. yes
   ____________ 90. no

O. Is beer or wine located in the dairy case between the milk and the eggs? ...... ____________ 91. yes
   ____________ 92. no

P. Is beer or wine in a refrigerated case adjacent to the dairy case? ____________ 93. yes
   ____________ 94. no

Q. Has shelving been set at staggered heights in the dairy case to break up horizontal lines? ____________ 95. yes, various heights
   ____________ 96. little variety in ht.
   ____________ 97. no, all horizontal
R. Are products organized or departmentalized by product (rather than brand) in the dairy case?
   yes, by product 
   no, by brand

S. Has vertical display been used? 
   (milk/cream, cottage cheese/yogurt, butter/margarine 
   stocked top to bottom in case)
   yes
   no

T. Are high volume items like eggs and milk placed at 
   opposite ends of the dairy case?
   yes
   no

U. Within the outline given below, indicate briefly the placement 
of only the following products: milk, butter/margarine, eggs, biscuits and 
and juice and if cheese, wine or beer is placed here add them also.

V. Check the status of the shelf space for the following products. (Adequate 
means 80-100% full and overstocked means product sitting on the grating or 
in the aisle.)

<table>
<thead>
<tr>
<th>Product</th>
<th>Empty</th>
<th>Low</th>
<th>Adequate</th>
<th>Overstocked</th>
</tr>
</thead>
<tbody>
<tr>
<td>Whole milk</td>
<td>104.</td>
<td>105.</td>
<td>106.</td>
<td>107.</td>
</tr>
<tr>
<td>Lowfat milk</td>
<td>108.</td>
<td>109.</td>
<td>110.</td>
<td>111.</td>
</tr>
<tr>
<td>Yogurt</td>
<td>112.</td>
<td>113.</td>
<td>114.</td>
<td>115.</td>
</tr>
<tr>
<td>Cottage Cheese</td>
<td>116.</td>
<td>117.</td>
<td>118.</td>
<td>119.</td>
</tr>
<tr>
<td>Sour Cream</td>
<td>120.</td>
<td>121.</td>
<td>122.</td>
<td>123.</td>
</tr>
<tr>
<td>Cream</td>
<td>124.</td>
<td>125.</td>
<td>126.</td>
<td>127.</td>
</tr>
<tr>
<td>Butter</td>
<td>128.</td>
<td>129.</td>
<td>130.</td>
<td>131.</td>
</tr>
</tbody>
</table>
W. If you can see a temperature gauge at the top or sides of the dairy case, what does it read. If there are several gauges, give the reading for each.

X. Looking at only the dairy case, would you buy products from it?

III. Cheese Display

The cheese display is any refrigerated area containing process, natural and imitation cheeses. (doesn't include cottage cheese)

A. Check the places where cheese is displayed in this supermarket.

B. Check the pieces displayed.

C. How high is the cheese mobile hung above the floor?

D. Where is the cheese mobile hung?

E. Is the general appearance of the point of purchase material clean and attractive?

F. Is there other point of purchase material present?
G. Is the cheese display area clean? ..................... 158. yes
   159. no

H. Are there any expanded and/or moldy packages of ... 160. yes
   (check Swiss cheese particularly) 161. no

I. Are there any imitation cheese products in the ..... 162. yes
   cheese case. (ie. Kraft's Golden Image, Fisher
   Cheese Co.'s Count-Down or Cheeseola, or imitation
   mozzarella) 163. no

J. Check the status of display space for cheese ....... 164. empty
   (Adequate means 80-100% full and overstocked means
   product sitting on the grating or in the aisle.) 165. low
   166. adequate 167. overstocked

The ice cream case is the area in the frozen food section where ice
cream and frozen novelties (ice cream sandwiches, ice cream sticks,
etc.) are displayed.

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Is the ice cream mobile displayed? ............... 168. yes</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>B. How high is the mobile hung above the floor? ...... 170. under 7 ft.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>C. Where is the mobile hung? ............................ 173. over the case</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>D. Is the general appearance of the mobile clean and ... 175. yes</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>E. Is other point of purchase material present? ........ 177. yes</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>F. What type of ice cream freezer is this? ............ 179. coffin style</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

HOUSEKEEPING AND STOCKING

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Is the ice cream case neat? ....................... 181. yes</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>B. Is the shelf under the ice cream clean? .......... 183. yes</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
C. Is ice cream stocked over the loadline in the case? ____ 185. yes
      ____ 186. no

D. Check the outside of more than one brand of ice cream, do the containers show ice crystals the texture of granulated sugar or leaking ice cream indicating that the product has been refrozen? ____ 187. yes
      ____ 188. no

E. Check the status of the case for the following products.

<table>
<thead>
<tr>
<th></th>
<th>empty</th>
<th>low</th>
<th>adequate</th>
<th>overstocked</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vanilla ice cream</td>
<td>189.</td>
<td>190.</td>
<td>191.</td>
<td>192.</td>
</tr>
<tr>
<td>Frozen novelties</td>
<td>193.</td>
<td>194.</td>
<td>195.</td>
<td>196.</td>
</tr>
</tbody>
</table>

F. If you can see a temperature gauge in the ice cream case what does it read?
   ____ 197. _____
   ____ 198. _____
   ____ 199. _____
   ____ 200. _____
   ____ 201. no gauge visible

G. Looking at only the ice cream case, would you buy products from it? ____ 202. yes
      ____ 203. no

V. GENERAL HOUSEKEEPING

A. On the basis of cleanliness and appeal to you as a consumer, if this store were convenient for you, would you shop here? ____ 204. yes
      ____ 205. no