



PLAINTIFF'S EXHIBIT

CON-81

1988 CONSUMER RESEARCH
INCLUDING TREND ANALYSIS FROM 1987 AND 1984

A STUDY CONDUCTED FOR
CONGOLEUM CORPORATION

June, 1988

TABLE OF CONTENTS

GOALS OF THE RESEARCH	i
CONDUCT OF THE RESEARCH	iii
NOTES ON READING THIS REPORT	iv
SECTION I: THE PURCHASE PROCESS	1
SECTION II: AWARENESS OF MANUFACTURERS	13
SECTION III: RATINGS OF MANUFACTURERS	21
SECTION IV: CHOOSING A BRAND	28
SECTION V: SOME MISCELLANEOUS ISSUES	39

APPENDICES

- A: Screen sheet
- B: Form A - Purchasers of Non-Sheet Vinyl Flooring
- C: Form B - Past Purchasers of Sheet Vinyl Flooring
- D: Form C - Intending Purchasers of Sheet Vinyl Flooring
- E: Demographic Characteristics of Respondents
- F: Interpretation of and Uncertainty in Survey Results

INTRODUCTION

Goals of the research

This research provides an ongoing aid to understanding the role consumers play in the selection of sheet vinyl floor covering.

The emphasis of this report is two-fold:

- * First, questions from previous consumer research were duplicated in order to track consumers awareness levels and decision-making processes. Findings from this study are compared to findings from consumer interviews conducted in June of 1987 and June of 1984.

Specifically, tracking questions were included to monitor:

- Incidence of households purchasing and intending to purchase sheet vinyl flooring;
- Sheet vinyl flooring brand awareness;
- Advertising awareness and recall;
- Brand preference and brand purchased;
- Reasons for brand choice;
- Ratings of manufacturers overall, and on specific product characteristics;
- The importance of sheet vinyl flooring characteristics (e.g. quality, durability, design, color, price);
- Replacement issues, including the type of flooring replaced, reasons for the replacement, and length of time previous flooring was in place;
- The type and number of rooms for which flooring is purchased;
- Number of stores visited;
- Role of the retailer in the purchase decision;
- Satisfaction with purchase decision;
- Decision issues involving length of purchase process and method of installation;
- Awareness of, and attitudes toward, "inlaid" sheet vinyl flooring and "never-wax" sheet vinyl flooring.

* Second, new questions were formulated to determine:

- Consumers' expectations of sheet vinyl flooring, including durability and cleanliness issues;
- Which of a selection of potential brand names evoke longevity in a flooring, and which names are preferred;
- Other flooring products consumers may have considered;
- Reasons for purchasing sheet vinyl flooring rather than other flooring products;
- Consumers' definitions of quality and durability in vinyl flooring;

Conduct of the research

A total of 1503 interviews were completed with female heads of households 18 years or older. Interviews were conducted during the period May 3 through May 24, 1988. (In comparison, 1518 interviews were completed in the 1987 research.)

A stratified random national telephone sample was utilized. In order to obtain a representative sample of households, 597 interviews were conducted among households with no past or intended purchasers of sheet vinyl flooring. Consistent with the weighting used in the 1984 and 1987 consumer studies, the total sample was weighted to 1982 census data demographic characteristics. The past and intended purchaser (referred to as "intenders" throughout this report) samples were also weighted to replicate the sample sizes of past and intending purchasers interviewed last year. Though a smaller proportion of intenders were interviewed this year compared to last (279 versus 320 in 1987), the difference is not statistically significant.

The distribution of completed interviews is as follows:

- 279 Intended purchasers, within the next two years, of sheet vinyl flooring;
- 325 Purchasers, within the past two years, of sheet vinyl flooring.
- 302 Purchasers of non-sheet vinyl flooring for demographic information and purchase information;
- 597 Non-qualified households for demographic information.

Interviews with purchasers and intenders averaged 21 minutes in length.

Questionnaires are included as Appendices A thru D at the end of this report. Demographic information on all respondents is included as Appendix E.

Notes on reading this report

This research is presented in the form of brief interpretive passages of text, supported by summary data tables. Comparative tables between this research and previous research are presented when appropriate. We mention improving and declining trends if these trends appear suggestive of real differences over time, or if the same trend appears in several questions.

A full set of computer tabulations is provided separately. Appendix F contains a detailed explanation of the uncertainty in, and interpretation of, the survey results.

All figures in the tables are percentages unless otherwise noted. The frequencies on which these percentages are based are shown at the top of each table.

As required by the Code of Ethics of the American Association for Public Opinion Research, we will maintain the anonymity of our respondents. No information can be released that will in any way reveal the identity of a respondent. Our authorization is required for any publication of the research findings or their implications.

SECTION I
THE PURCHASE PROCESS

Product use

The rooms for which sheet vinyl flooring is selected remained constant over the past year. Sheet vinyl flooring continues to be chosen most often for the kitchen area.

Overall, the percentage of respondents who have purchased, or plan to purchase, sheet flooring for more than one room decreased somewhat in 1988. A total of 33% of purchasers covered multiple rooms with sheet vinyl flooring while a higher percentage of intenders (43%) plan to cover more than one room with sheet vinyl flooring.

As in 1987, the majority of respondents from this research are replacing an existing floor.

- Q.17 For what room(s) or area(s) did you (are you planning to) purchase sheet vinyl flooring?
 Q.18 Was (is) the flooring a replacement or the first flooring to be laid down?

(NUMBER OF RESPONDENTS)	1988 (604)	1987 (600)
Kitchen	83%	82%
Full bath	38	42
Foyer	11	10
Family room	9	7
Half bath	8✓	10
Basement	4	2
Multiple rooms	38%	44%
Kitchen only	45%	41%
Full bath only	9	10%
Kitchen and bath	28%	30%
Replacement floor	89%	85%
Original	12	15

Total market size

Approximately the same proportion of people contacted in both 1988 and 1987 (15%) said they had purchased or intend to purchase sheet vinyl flooring. (Recall that in 1984 this proportion was approximately 17% of people contacted.) --Further, as the table above shows, the distribution of rooms for which flooring was purchased also stayed much the same from 1987 to 1988.

We conclude that there has been no statistically significant change in market size in the past year.

Replacement issues

The majority of respondents replace their flooring with a the same type of flooring product as was in place previously. Fifty-five percent (55%) of respondents have replace, or expect to replace, sheet vinyl with sheet vinyl, while 23% replace vinyl tiles with sheet vinyl.

In 1987, we asked respondents (in an open-ended manner) why they replaced or plan to replace their flooring. Worn flooring was the most mentioned reason. In contrast, in this study, we read response categories to the respondents. Along with worn flooring, the majority of consumers say they are replacing the flooring as part of an overall redecoration.

- Q.21 What kind of flooring was replaced (do you now have) in your (room)?
Q.22 Why did you (are you planning to) replace the flooring?

(NUMBER OF RESPONDENTS WHO REPLACED/WILL REPLACE FLOOR)	---ROOM REPLACED FLOORING 1988---							
	1988 TOTAL (535)	1987 TOTAL (505)	KIT- CHEN (494)	FULL BATH (216)	HALF BATH (46)	FOYR (67)	FMLY ROOM (49)	BASE MENT (22)
REPLACED								
Sheet vinyl	55%	52%	56%	52%	66%	62%	54%	37%
Vinyl tiles	23	30	24	32	30	29	19	38
Carpeting	15	15	14	20	29	18	28	17
Ceramic tiles	9	6	10	11	9	8	8	13
Wood flooring	6	6	6	6	3	11	20	2
Other	4	6	4	4	-	12	1	27
Don't know	3	1	3	3	-	-	-	-
REASON FOR REPLACEMENT								
Worn flooring	43%	53%	44%	42%	52%	39%	37%	24%
Overall re-decorating	42	16	42	49	41	51	52	47
Color	15	22	16	13	4	22	11	20
Wanted floor that was easier to care for	14	10	14	14	5	17	24	3
Design	10	10	10	8	8	12	21	8
Dislike type flooring	10	9	10	6	6	10	14	3
No-wax/never-wax finish	8	6	8	7	10	5	20	3

Purchase process

Consumers lived in their homes an average of 8 years before they began the process of replacing their flooring. As the table below shows, the number of years the replacement flooring had been in place averaged between 12 and 17 years, depending upon the room in which the flooring was replaced. These averages increased in this research compared to an average of approximately 11 years in 1987.

Q.20 How long was the previous flooring (has the current flooring) been in place in your (room)?

AVERAGE NUMBER OF YEARS

Kitchen	12.5
Full bath	12.5
Basement	12.5
Half bath	13
Foyer	14
Family room	16.5

The time between first considering purchasing flooring, and the actual purchase of that flooring, averaged 18 months in 1984 and 17.5 months in 1987. This year, intenders averaged a somewhat shorter time period from the time they first thought of purchasing until the time they expect to purchase (15 months.)

INTENDERS:

	<u>1988</u>	<u>1987</u>
Average number of months thinking of purchase	9	11
Number of months expect to decide on flooring	6	6.5
TOTAL MONTHS IN DECISION PROCESS	15	17.5

This year, as in 1987, the time between when purchasers first began thinking of purchasing until they visited a store was almost four months.

Stores visited

Purchasers visited an average of 3 stores prior to selecting a sheet vinyl floor.

AVERAGE NUMBER OF STORES VISITED BY PURCHASERS

1987	2.9 Stores
1988	2.8 Stores

The majority of both purchasers and intenders shop for sheet vinyl flooring in a flooring store that sells all types of flooring products.

Q.26 From which of the following types of stores did you (do you expect) to purchase your sheet vinyl flooring?

(NUMBER OF RESPONDENTS)	-TOTAL- (604)	-PURCHASERS- (325)	-INTENDERS- (279)
Flooring store that sell all types of floors	✓ 47	51	44
Home center, hardware store, lumberyard	✓ 16	19	14
Store that sells flooring, paint, wallpaper	✓ 13	12	14
Flooring that sells only sheet vinyl flooring and vinyl tiles	✓ 10	9	11
Store that specializes in decorating rooms	6	2	10
Other	6	7	5
Don't know	4	1	6

Purchase decision

The decision to purchase flooring is most often made by either the female head of household or by both heads of household. In 1988, there was an increase in respondents who said the purchase was or will be solely that respondent's decision (from 36% to 53%).

The family as a unit continues to be most involved in the areas of assessing cost or colors. (The decrease of percentages of the ways in which family members are active in the decision process resulted from fewer multiple responses from respondents.)

FORMS B AND C: Q.27 Who will decide which floor covering to purchase? Will the decision be made only by you, by you and other members of your family, or by a professional...? (Who will decide which floor covering to purchase?)
FORM A: Q.2,3

FORMS B AND C: Q.28 How did (will) _____ participate in the decision?

(NUMBER OF RESPONDENTS)	---TOTAL---		--PURCHASERS--		--INTENDERS--		PURCHASERS OF -NON-VINYL-
	1988 (604)	1987 (600)	1988 (325)	1987 (280)	1988 (279)	1987 (320)	1988 (302)
Respondent decision	53%	36%	49%	36%	56%	37%	45%
Respondent/family	45	56	47	56	43	56	52%
Respondent/professional	2	8	4	11	1	6	3
PARTICIPATION							
Cost	16%	24%	11%	20%	20%	27%	na
Color	16	22	18	30	14	15	na
Design	6	11	8	14	5	9	na
Manufacturer	4	6	3	7	4	6	na
Quality	5	4	4	3	6	5	na
Other	7	3	8	2	6	3	na
All aspects of decision	11	14	11	11	11	17	na

Method of installation of sheet vinyl flooring

We continue to see a small increase in the proportion of purchasers who have installed, or expect to install, the sheet vinyl flooring themselves compared to 1984.

Over one-half (51%) of intenders plan to install the sheet vinyl flooring themselves. In comparison, 43% of purchasers did the installation themselves.

"Do-it-yourself" installation was not affected by brand purchased.

Q.48 Who installed (do you think will install) the flooring in your...?

(NUMBER OF RESPONDENTS)	-----PURCHASERS-----			-----INTENDERS-----		
	1988 (325)	1987 (280)	1984 (125)	1988 (279)	1987 (320)	1984 (125)
PROFESSIONALLY INSTALLED (NET)	58%	61%	68%	51%	51%	61%
Retailer provided	39	35	41	36	37	na
Professional hired by you	19	25	26	16	14	na
DO-IT-YOURSELF (NET)	43%	42%	32%	53%	51%	38%

na - not asked

Purchase decision among non-sheet vinyl flooring purchasers

Of floor covering purchases that were not sheet vinyl flooring, carpeting continues to be the most-purchased product.

There was a decrease of the purchase of vinyl tiles among these respondents.

FORM A Q.D What kind of flooring did you purchase?

	1988 (302)	1987 (316)
(NUMBER OF RESPONDENTS)		
Carpeting	69%	64%
Vinyl tiles	16	29
Ceramic tiles	15	16
Wood flooring	4	5

In the 1987 study we asked consumers of non-sheet vinyl flooring why they chose a flooring product other than sheet vinyl. In this study, we first asked, in general, why they chose the flooring they did. Even though the questions were worded differently, responses to these questions varied little.

As the table on the following page shows, carpeting is chosen for warmth, appearance, and softness or noise absorption. There was an increase of purchasers who said carpeting was easy to care for.

Vinyl tiles are the flooring product most chosen because of ease of installation. Other reasons vinyl tiles were chosen include their appearance and ease of care.

Ceramic tile is chosen primarily for its appearance, and secondarily for its maintenance and durability.

Last year, wood was most often chosen for its appearance. This year, there was an increase of purchasers who chose wood in general for its durability, cost, and ease of maintenance.

Purchase decision among non-sheet vinyl flooring purchasers

1988: FORM A Q.1 Why did you choose (flooring)?

1987: FORM A Q.1 Why did you choose (type of flooring) instead of sheet vinyl?

	-----NON-SHEET VINYL FLOORING PURCHASED-----									
	-TOTAL-		-CARPET-		VINYL -TILE-		CERAMIC -TILE-		-WOOD-	
	88'	87'	88'	87'	88'	87'	88'	87'	88'	87'
Appearance	26%	24%	21%	24%	33%	16%	52%	52%	38%	64%
Warmth	22	14	32	22	-	1	2	2	8	7
Ease of care	24	12	22	13	33	6	36	20	23	11
Cost	14	9	13	6	15	20	11	2	31	9
Softer, quieter	12	8	16	12	-	-	2	2	-	5
Ease of installation	9	8	3	2	40	24	7	-	-	-
Durability	9	7	6	4	6	5	18	24	54	10
General preference	14	na	15	na	6	na	16	na	-	na
Considered a "non-vinyl room"	na	8	na	11	na	1	na	2	na	6
Design, pattern	na	6	na	2	na	16	na	14	na	-
Replace with same flooring	7	4	10	6	2	5	5	-	8	-
*Other	4	21	3	22	8	20	7	24	-	9

* "Other" combines a variety of reasons each mentioned by 4% or fewer respondents.

Other flooring products

As the table on the following page shows, 58% of sheet vinyl purchasers and intenders did not look at flooring products other than sheet vinyl. In comparison, the majority (65%) of purchasers of non-sheet vinyl flooring did not look at any other type of flooring prior to their purchase; further discussion of this follows.

Of the 42% of sheet vinyl consumers who did look at other flooring products, carpeting is mentioned most often as the product considered overall, and among intenders in particular. The only other significant factor affecting incidence of "carpet" as a mention appears to be the age of the respondent, that is, incidence of "carpet" as a mention increases with the respondent's age. The other flooring product which shows some relationship with demographic variables is ceramic tile, whose mention increases with both higher education and income.

In general, people choose sheet vinyl flooring over other flooring products because it is easier to clean and/or maintain. Price is most often mentioned by those who considered ceramic tile and/or wood in addition to sheet vinyl. Also mentioned is "appropriate for room"; this mention is most often made by those who had considered either carpeting or wood flooring in addition to sheet vinyl. Those who considered vinyl or ceramic tiles were more inclined to mention installation and the one piece/seamless qualities of sheet vinyl than those who considered carpet and wood in addition to sheet vinyl flooring.

Other flooring products

Q.12 Did (Have) you look at any other types of flooring in a store (before you purchased) (other than) sheet vinyl flooring?

(NUMBER OF RESPONDENTS)	TOTAL (604)	PURCHASERS (325)	INTENDERS (279)
Looked at other types of flooring	42%	43%	41%
Didn't look at other types of flooring	58	57	59
TYPE OF FLOORING LOOKED AT:	(247)	(134)	(113)
Vinyl tiles	37%	36%	37%
Ceramic Tiles	27	37	18
Carpeting	41	31	49
Wood	21	19	23
Other	5	4	6
Don't know	8	16	1

Q.12b Why did you purchase sheet vinyl instead of (other flooring looked at)?

Q.12c Why did you choose sheet vinyl flooring rather than some other type of flooring, such as carpet, vinyl or ceramic tile, or wood?

(NUMBER OF RESPONDENTS)	TOTAL (604)	---OTHER TYPE OF FLOORING LOOKED AT---				LOOKED AT NO OTHER FLOOR
		VINYL TILE (92)	CERAMIC TILE (73)	CARPET (98)	WOOD (49)	(357)
Easy to maintain	39%	32%	31%	42%	42%	43%
Appropriate for room	24	22	24	46	37	22
Durability	19	27	27	26	32	16
Price	17	31	44	18	50	10
Installation	10	22	24	6	7	8
Pattern/color/design	9	11	16	8	9	8
One piece/no seams	8	21	16	8	4	7
Texture	4	6	11	4	4	4
Shine	3	2	2	1	-	4
Other	19	26	25	20	25	18

Reasons for purchasing flooring products other than sheet vinyl flooring

Purchasers of non-sheet vinyl flooring did not choose sheet vinyl flooring for a variety of reasons. A combined percentage of 29% of purchasers of non-sheet vinyl flooring either said they had no interest in sheet vinyl, or specifically wanted the type of flooring they did purchase.

Purchasers of vinyl tile specifically mention lower cost and ease of installation as reasons for choosing vinyl tile rather than sheet vinyl.

Purchasers of carpeting see it as more decorative or suitable than sheet vinyl. Carpeting is also preferred for its warmth.

FORM A Q.6 Why didn't you choose sheet vinyl as a floor covering?

Q.8 Why didn't you consider sheet vinyl flooring?

(NUMBER OF RESPONDENTS)	TOTAL (302)	-----TYPE OF FLOORING PURCHASED-----			
		CARPET (208)	VINYL TILE (48)	CERAMIC TILE (44)	WOOD (13)
Decorating reasons	18%	22%✓	2%	14%	15%
Not familiar/no interest	14	13	21	9	31✓
Wanted this particular flooring	15	20✓	-	-	8
Cost	14	11	21✓	14	38✓
Appearance	13	10	15	20✓	31✓
Too cold	12	16	-	2	-
Bad prior experience with sheet vinyl	10	8	13✓	27✓	15
Installation	7	2	27✓	5	-
Hard to maintain	5	6	4	7	-
Poor selection	2	-	2	2	-
Other	9	7	15	16	15
Don't know	2	2	4	2	-

SECTION II
AWARENESS OF MANUFACTURERS

Unaided brand awareness

Top-of-mind brand awareness, or first unaided mention, of all manufacturers remained essentially unchanged between 1987 and 1988.

There was a continued improvement in total unaided awareness of Armstrong and Congoleum over the past four years. However, Mannington, which had improved the most in unaided awareness between 1984 and 1987, showed a slight drop in unaided mentions in this most recent survey.

While our previous report indicated a narrowing of the "awareness" gap between Mannington and Congoleum, in this study awareness of Mannington has lowered while Congoleum's awareness level has risen slightly. Congoleum's principal concern relative to name recognition continues to be Armstrong's stronger awareness among consumers of sheet vinyl flooring.

Unaided recall of Sears and Tarkett remains insignificant.

- Q.1 What company first comes to mind when you think of sheet vinyl floor covering?
Q.2 What other companies come to mind?

(NUMBER OF RESPONDENTS)	1988 (604)	1987 (600)	1984 (250)
UNAIDED, FIRST MENTION:			
Congoleum	12%	13%	14%
Armstrong	54	55	50
Mannington	3	5	2
Sears	1	1	-
GAF/Tarkett	1	*	-
Other	5	7	3
Don't know, none	27	21	30
UNAIDED, TOTAL MENTION:			
Congoleum	29%	25%	21%
Armstrong	65	61	57
Mannington	10	13	4
Sears	5	3	1
GAF/Tarkett	4	3	2
Other	10	13	5

* - Less than one-half of one percent.

Aided brand awareness

When aided, 1988 respondents were somewhat less likely to recall a specific brand than were respondents in the 1987 study; correspondingly recall of all brands decreased.

The gap between overall awareness (unaided and aided) of Armstrong and of Congoleum widened by 4%. Armstrong continues to hold a favorable "top of mind" advantage over all brands while Congoleum has an advantage over all brands except Armstrong.

*Q.3 Have you heard of (manufacturer) sheet vinyl flooring?

(NUMBER OF RESPONDENTS)	1988 (604)	1987 (600)
AIDED AWARENESS:		
Sears	54%	69%
Congoleum	54	64
Armstrong	29	37
Mannington	31	35
GAF/Tarkett	14	18
UNAIDED AND AIDED RECALL, TOTAL		
Armstrong	94%	98%
Congoleum	83% 82	90
Sears	60	73
Mannington	41	48
GAF/Tarkett	18	21

* This question was not asked in 1984.

Brand awareness: purchasers and intenders

Mirroring the results found among all respondents, total recollection of all brands among purchasers and intenders decreased slightly in 1988.

Over the past four years, unaided total mention of Armstrong and Congoleum have steadily increased among both purchasers and intenders, whereas the unaided mention of Mannington has fluctuated.

(NUMBER OF RESPONDENTS)	-----PURCHASERS-----			-----INTENDERS-----		
	1988 (325)	1987 (280)	1984 (125)	1988 (279)	1987 (320)	1984 (125)
UNAIDED, FIRST MENTION						
Congoleum	16%	17%	13%	8%	10%	15%
Armstrong	60	58	54	49	52	47
Mannington	4	4	3	2	5	1
Don't know, none	18	14	24	34	28	35
UNAIDED, TOTAL MENTION						
Congoleum	36%	32%	20%	22%	20%	21%
Armstrong	72	67	60	60	56	55
Mannington	13	17	6	7	9	3
AIDED RECALL						
Sears	52	62%	na	56%	75%	na
Congoleum	50	60	na	57	67	na
Armstrong	25	32	na	33	41	na
Mannington	37	37	na	27	34	na
GAF/Tarkett	18	22	na	10	16	na
TOTAL RECALL, AIDED AND UNAIDED						
Congoleum	85%	92%	na	80%	87%	na
Armstrong	96	99	na	93	97	na
Mannington	50	54	na	34	43	na

na = not available

Advertising awareness

Awareness of Congoleum advertising decreased in 1988, as has advertising awareness of all its competitors. Significantly, the relative awareness of one manufacturer's advertising compared to the others' advertising is unchanged.

- Q.4 Which manufacturers of sheet vinyl floor covering have you seen or heard advertisements for in the past three or four months?
Q.5 Have you seen or heard any advertisements for...?

(NUMBER OF RESPONDENTS)		1988 (604)	1987 (600)	1984 (250)
UNAIDED AWARENESS:				
	Congoleum	29%	33%	24%
	Armstrong	48	51	35
	Mannington	12	16	5
	Sears	6	13	6
	GAF/Tarkett	3	3	2
	Other	1	12	3
	Don't know, none	40	22	52
TOTAL MENTION, AIDED AND UNAIDED:				
	Congoleum	48%	58%	44%
	Armstrong	67	71	57
	Mannington	18	27	12
	Sears	19	36	23
	GAF/Tarkett	4	10	6

Major copy points recalled among those who are aware of advertising

Respondents continue to recall a variety of similar copy points about each of the three manufacturer's (Congoleum, Armstrong, and Mannington) advertising. Recall of the content of the advertising centers around durability, maintenance, and images of beautiful floors.

Recollection of Congoleum's "Scuff-Tuff" advertising campaign was very low (2%).

Mannington advertising, spotlighting Ed McMahon, is recalled by an average of 10% of respondents over the past two years.

There was a 7% increase of respondents who recall Armstrong the mention of durability or quality as a copy point in Armstrong advertisements.

*Q.7,9,11 What did the advertising for BRAND say or show?

(NUMBER OF RESPONDENTS AWARE OF ADVERTISING)	-----1988-----			-----1987-----		
	CONG (285)	ARMS (397)	MANN (117)	CONG (357)	ARMS (421)	MANN (158)
Durability/quality	21%	30%	11%	23%	23%	13%
No-wax	20	16	14	20	15	7
Easy to maintain	18	14	9	14	12	7
Picture of rooms	14	14	-	17	14	-
Looks, beauty	13	8	6	10	7	4
Patterns/colors	12	13	8	7	8	8
Shine	9	5	1	10	6	3
Installation	3	4	4	2	3	-
Scuffing or "scuff-tuff"	2	-	-	-	-	-
Ed McMahon	-	-	11	-	-	9
Other	9	14	12	13	18	23
Don't know	33	29	43	30	30	45

* We did not present 1984 data since the coding of these questions was altered in both 1987 and 1988 to provide in greater detail the copy points recalled.

Source of advertising

Recall of Congoleum and Armstrong magazine advertising have each decreased 12% in the last year. However, Congoleum magazine advertising recall, relative to Armstrong, has maintained an 8% favorable edge.

Recall of television advertising is significantly higher this year among all manufacturers. However, recollection of Congoleum's television advertising continues to be lower than recollection of either Armstrong or Mannington television advertising.

Mannington's television advertising continues to enjoy the highest television advertising recollection of the three major competitors.

Q.6,8,10 Where did you see or hear advertising for (manufacturer)?

(NUMBER OF RESPONDENTS AWARE OF ADVERTISING)	-----1988-----			-----1987-----		
	CONG (285)	ARMS (397)	MANN (117)	CONG (357)	ARMS (421)	MANN (158)
Magazines	57%	49%	30%	69%	61%	31%
Television	38	44	50	28	32	39
Newspapers	12	10	2	16	11	11
Store	5	6	6	8	10	11
Radio	2	1	1	3	2	8
Other	3	2	3	2	3	1
Don't know	6	6	16	1	4	16

Sources of information about sheet vinyl flooring

Magazine advertisements continue to be the most utilized source of information regarding sheet vinyl flooring in general - 35% of respondents have or expect to use magazine advertisements as a source of information.

In this survey there was an 8% increase of those who rely on friends or relatives as an initial source of information about sheet vinyl flooring. A comparable decrease was seen in respondents who seek this information from a retailer.

Manufacturer's brochures were mentioned by 14% of those responding, almost as many as those who seek the advice of retailers (16%).

Q.29 There are a variety of sources people can use to obtain information about vinyl floor covering. Please tell me which of the following sources you first used to find out about vinyl flooring.

Q.31 (IF MAGAZINES) Which magazines have you looked at?

(NUMBER OF RESPONDENTS)	1988 (604)	1987 (600)
Magazine advertisements	35%	36%
Retailer	16	24
Friends, relatives	29	21
Manufacturer's product brochures	14	na
Newspaper advertisements	9	10
Magazine articles	9	7
Other (volunteered)	7	8
Don't know	7	2
NET MAGAZINE ADVERTISING/ARTICLES	(251)	(385)
Better Homes and Gardens	37%	43%
Good Housekeeping	25	22
Women's Day	16	13
Family Circle	15	15
McCall's	9	9
Ladies Home Journal	9	na
Redbook	7	7
House Beautiful	6	7
Others	34	40

Magazines read

As stated previously, respondents find magazines are a useful source of general information about flooring. Better Homes and Gardens appears to be the magazine in which respondents most frequently recall reading sheet vinyl flooring articles and/or advertising.

SECTION III
RATINGS OF MANUFACTURERS

Overall rating of manufacturers

Although the majority of respondents are aware of both Congoleum and Armstrong, a higher proportion of respondents were able to rate Armstrong than Congoleum.

In general, respondents this year were less inclined to rate any manufacturer as "excellent." The decrease in "excellent" ratings resulted in small increases of both "good" and "fair/poor" ratings. Overall, however, ratings of Congoleum, Armstrong, and Mannington changed little compared to 1987 ratings.

Armstrong continues to be rated somewhat higher than Congoleum.

As in 1987, over one-half of respondents could not rate Mannington. Among those who were able to rate Mannington, it received somewhat lower overall ratings than did Congoleum and Armstrong.

Q.14 Based on your own experience and on everything you now know or have heard about vinyl floor covering, please rate each of the following companies overall as either excellent, good, fair, or poor.

	1988 (477)	1987 (483)	1984 (235)
(NUMBER OF RESPONDENTS AWARE OF CONGOLEUM AND RATED IT)			
CONGOLEUM			
Excellent	43%	50%	48%
Good	49	45	46
Fair, poor	8	6	6
(NUMBER OF RESPONDENTS AWARE OF ARMSTRONG AND RATED IT)	(560)	(548)	(242)
ARMSTRONG			
Excellent	52%	56%	59%
Good	44	42	38
Fair, poor	5	3	3
(NUMBER OF RESPONDENTS AWARE OF MANNINGTON AND RATED IT)	(244)	(245)	(na)
MANNINGTON			
Excellent	28%	37%	na
Good	54	49	na
Fair, poor	18	14	na

na = not asked

Brand imagery ratings

Respondents were asked to rate Armstrong, Congoleum, and Mannington on a variety of characteristics.

"Excellent" ratings of Congoleum have fluctuated between 1984 and 1988, with no significant trending seen. Armstrong shows slight increases in "excellent" ratings for each characteristic.

As in 1984 and 1987, Congoleum was given fewer "excellent" ratings in each area in comparison to Armstrong.

Of all areas asked about, Congoleum received its highest individual "excellent" rating for "being a leader in styles and designs."

Armstrong received its highest percentage of "excellent" ratings as "being a leading company in the sheet vinyl business."

Q.15 Now I'd like you to rate sheet vinyl floor covering by different manufacturers on each of the characteristics I'm going to read.

	--PERCENTAGE RATED MANUFACTURER EXCELLENT--					
	-----CONGOLEUM-----			-----ARMSTRONG-----		
	1988	1987	1984	1988	1987	1984
Being a company that is a leader in fashionable styles/designs	47%	46%	53%	55%	54%	55%
A company that makes flooring that looks good over time	40	45	40	52	46	46
A leading company in the sheet vinyl flooring business	46	48	46	57	51	54
A company that makes flooring that would look good in a number of rooms in the house	44	43	44	53	48	48
A company that makes flooring that is stain resistant	40	37	41	47	42	47

Comparative ratings among those who rate either Armstrong
or Congoleum over the other manufacturer

As in the 1987 study, respondents to this survey who gave an equally good overall rating to both Congoleum and Armstrong tended also to rate both manufacturers about equally on individual characteristics.

When respondents rate the manufacturer that they rate best overall on individual characteristics, bias is present; respondents who rate a manufacturer highest overall also consistently rate that manufacturer higher for individual characteristics.

Unless substantial rating differences are present throughout (.2 or more), rating questions are not so much indicators of which manufacturer is better they are indicators of which product characteristics are important enough to a purchaser to differentiate one manufacturer from another.

Between 1987 and 1988, the most significant shift has been in the perception of those who rate Armstrong better overall relative to the specific characteristic of "makes flooring that looks good over time." In this category, Armstrong's rating increased .3 between 1988 and 1987. With this exception, no other rating changed significantly between 1987 and 1988. (We note that, as discussed in the last section of this report, the majority of respondents characterize a "durable floor" as one that is easy to clean and looks good over time.)

*AVERAGES ARE LISTED BELOW. BASED ON A SCALE RATING OF 1 TO 4

(NUMBER OF RESPONDENTS)	-----OVERALL RATING OF MANUFACTURERS (Q14)-----					
	CONGOLEUM BETTER		ARMSTRONG BETTER		EQUAL	
	1988	1987	1988	1987	1988	1987
	(69)	(51)	(184)	(148)	(313)	(345)
LEADER IN FASHIONABLE STYLES/DESIGNS						
Congoleum	3.6	3.6	3.0	3.2	3.5	3.5
Armstrong	3.3	3.4	3.6	3.5	3.5	3.6
MAKES FLOORING THAT LOOKS GOOD OVER TIME						
Congoleum	3.6	3.7	2.9	3.0	3.3	3.5
Armstrong	3.1	3.2	3.7	3.4	3.4	3.5
LEADING COMPANY IN THE SHEET VINYL FLOORING BUSINESS						
Congoleum	3.6	3.6	2.9	3.3	3.5	3.5
Armstrong	3.3	3.2	3.6	3.5	3.5	3.5
MAKES FLOORING THAT WOULD LOOK GOOD IN A NUMBER OF ROOMS IN THE HOUSE						
Congoleum	3.4	3.5	3.0	3.2	3.4	3.4
Armstrong	3.2	3.2	3.5	3.5	3.5	3.5
MAKES FLOORING THAT IS STAIN RESISTANT						
Congoleum	3.4	3.4	3.0	3.0	3.4	3.3
Armstrong	3.2	3.1	3.6	3.5	3.4	3.3

Rating of manufacturers

We asked respondents to rate each manufacturer on a variety of characteristics. There were no significant changes in the ratings of either Congoleum or Armstrong.

Congoleum continues to rate highest in color, design, and quality, and is rated lowest in "good value for the price."

Armstrong receives somewhat higher average ratings than Congoleum for all descriptors, and received a .2 higher rating in the areas of durability, warranty, and ease of care.

Q.16 Based on what you know, or might think, and using a scale of 1 to 4, please rate each of these manufacturers on each of the following characteristics.

(MANUFACTURER RATED)	---CONGOLEUM---		---ARMSTRONG---	
	1988	1987	1988	1987
Designs	3.4	3.5	3.5	3.6
Colors	3.4	3.5	3.5	3.5
Good value for price	3.1	3.2	3.2	3.3
Durability of flooring	3.3	3.4	3.5	3.5
Warranty	3.2	3.2	3.4	3.4
Ease of care	3.3	3.5	3.5	3.5
Quality flooring	3.4	3.5	3.5	3.6

Rating of manufacturers

As noted previously both in this report and in the 1987 report - respondents who rate Armstrong and Congoleum equally overall rate them equally throughout, while those who prefer either Armstrong or Congoleum rate that manufacturer higher throughout.

Additionally, Armstrong ratings among Congoleum-preferer's are higher than Congoleum ratings among those who prefer Armstrong.

Average ratings for each characteristic decreased proportionately between 1987 and 1988.

Q.16 Based on what you know, or might think, using a scale of 1 to 4 where 1 stands for poor and 4 stands for excellent, please rate each of these manufacturers on each of the following....

		-----OVERALL RATING OF MANUFACTURERS (Q14)-----					
		CONGOLEUM BETTER		ARMSTRONG BETTER		EQUAL	
		1988	1987	1988	1987	1988	1987
(NUMBER OF RESPONDENTS)		(69)	(51)	(184)	(148)	(313)	(345)
DESIGNS							
	Congoleum	3.6	3.7	3.1	3.3	3.5	3.5
	Armstrong	3.3	3.3	3.6	3.7	3.6	3.6
COLORS							
	Congoleum	3.4	3.6	3.1	3.4	3.5	3.6
	Armstrong	3.4	3.4	3.6	3.6	3.5	3.5
GOOD VALUE FOR PRICE							
	Congoleum	3.2	3.4	2.9	3.1	3.2	3.2
	Armstrong	3.1	3.2	3.4	3.4	3.2	3.2
DURABILITY OF FLOORING							
	Congoleum	3.7	3.7	2.9	3.2	3.4	3.5
	Armstrong	3.2	3.3	3.6	3.7	3.5	3.5
WARRANTY							
	Congoleum	3.3	3.7	2.8	3.0	3.3	3.3
	Armstrong	3.0	3.4	3.5	3.4	3.4	3.4
EASE OF CARE							
	Congoleum	3.6	3.6	3.1	3.3	3.4	3.6
	Armstrong	3.3	3.5	3.7	3.6	3.5	3.5
QUALITY FLOORING							
	Congoleum	3.7	3.7	3.0	3.3	3.5	3.6
	Armstrong	3.3	3.3	3.7	3.6	3.5	3.6

Importance ratings of sheet vinyl flooring characteristics

Durability, color, quality, and ease of care receive the highest importance ratings among characteristics asked about. However, the majority of characteristics receive high ratings.

Once a respondent is reminded of the many flooring characteristics potentially available, they all become at least somewhat important. In order to distinguish which characteristics are of particular importance in the purchase process, we asked respondents to tell us which one characteristic was most important to them, and which is next in importance. Durability distinguishes itself as the most important characteristic in 1988 compared to 1987, when durability and color were seen as equally important.

- Q.32 Using a scale of 1 to 4, please rate the importance of each of the following characteristics of sheet vinyl when making your product selection.
- Q.33 Which one or two of these characteristics of sheet vinyl flooring was most important when you made your selection (is most important to you when selecting a vinyl floor)?
- Q.34 Assuming two or more manufacturers were equal in the characteristics just mentioned, what would be the next most important characteristic?

*AVERAGES ARE LISTED BELOW IN THE FIRST TWO COLUMNS.

(NUMBER OF RESPONDENTS)	1988 (604)	1987 (600)	-----IMPORTANCE-----					
			---MOST---		---NEXT---		-MOST + NEXT-	
			'88	'87	'88	'87	'88	'87
Durability	3.8	3.9	35%	30%	18%	14%	53%	44%
Colors	3.8	3.9	28	30	15	15	43	45
Quality	3.8	3.9	9	13	8	7	17	20
Ease of care	3.8	na	8	na	7	na	15	na
Designs	3.7	3.7	11	9	17	18	28	27
Stain resistance	3.7	3.7	2	1	2	3	4	4
No-wax	3.7	3.7	4	4	4	6	8	10
Scuff resistance	3.7	na	3	na	3	na	6	na
Seamless	3.5	3.6	3	2	3	1	6	3
Price	3.5	3.5	6	9	13	17	19	26
Warranty	3.4	3.4	3	4	8	11	11	15
Brand name reputation	3.2	3.1	2	*	1	1	3	1

na = not available

* = less than one-half of one percent

SECTION IV
CHOOSING A BRAND

Mind-set when enter store
Retailer involvement
Brand purchased and reason for purchase
Satisfaction with purchase
Brand which stands out among intenders
Brand preference

Specific manufacturer in mind when went to store

In 1988, there was an increase of purchasers who said they had a manufacturer in mind when they went into the store, from 21% in the two previous studies to 27%. Armstrong is the only brand which increased in mention as the brand purchasers had in mind. The small percentage of purchasers who had either Congoleum or Mannington in mind prior to entering the store remained unchanged.

Most purchasers (96%) who had Armstrong in mind did purchase an Armstrong product. Ten of the thirteen purchasers who had Congoleum in mind purchased Congoleum flooring.

We continue to believe that the high unaided awareness of Armstrong coupled with the high purchase rate indicates that, though not expressed, potential purchasers have some concept of brand "preference" or "identity" when they enter the store.

FORM B ONLY - Q.37 When you went to the store to buy your sheet vinyl flooring, did you have a specific manufacturer in mind?
Q.38 Which manufacturer did you have in mind?

(NUMBER OF RESPONDENTS WHO PURCHASED SHEET VINYL IN PAST 2 YRS)	1988 (325)	1987 (280)	1984 (125)
HAD SPECIFIC MANUFACTURER IN MIND	27%	21%	21%
Congoleum	7	6	7
Armstrong	21	14	14
Mannington	2	3	-
Other	1	1	1
HAD NO MANUFACTURER IN MIND/DON'T KNOW	73%	79%	78%

Manufacturers looked at prior to purchase

There was an increase in 1988 of respondents who looked at Armstrong and Congoleum products prior to purchase. The percentage who looked at Mannington did not change over the past year.

The percentage of Congoleum purchasers who looked at Armstrong products increased by 6% this year compared to last, while the percentage who looked at Congoleum products increased a significant 20%.

Overall, Armstrong continues to be the brand looked at most often. Congoleum is looked at more often than Mannington by a ratio of 2:1.

Q.40 Which manufacturers of sheet vinyl flooring (did you look at before you made your selection) (have you looked at)?

(NUMBER OF RESPONDENTS)	TOTAL 1988 (604)	TOTAL 1987 (600)	-----PURCHASED-----			
			CONGOLEUM		ARMSTRONG	
			'88	'87	'88	'87
			(68)	(58)	(172)	(133)
LOOKED AT						
Armstrong	57%	51%	58%	52%	74%	73%
Congoleum	38	33	72	52	33	46
Mannington	16	15	13	17	21	21
GAF/Tarkett	6	5	5	7	6	8
Solarian	4	3	2	2	6	5
Others	10	14	7	18	9	10
Don't know, none	26	36	12	16	14	18

Retailer involvement

The number of brands consumers discussed with retailers decreased proportionately past year.

Consumers do not seem to be discussing multiple brands with retailers as often as they had previously. The percentage of Congoleum purchasers who discussed Armstrong with a retailer decreased from 46% in 1987 to 25% in 1988. Likewise, 17% of Armstrong purchasers discussed Congoleum, compared to 29% in 1987.

In the 1988 study, respondents recalled more specific brand qualities related to them by retailers than in 1987. Retailers continue to tell consumers about the durability of both Armstrong (37%) and Congoleum (24%). Secondary qualities discussed include price for both brands, and color or design for Congoleum.

Very few respondents recall what retailers told them about Mannington flooring.

Q.41 Which manufacturers of sheet vinyl flooring did you talk about with a retailer?

(NUMBER OF RESPONDENTS)	TOTAL 1988 (604)	TOTAL 1987 (600)	-----PURCHASED-----			
			CONGOLEUM		ARMSTRONG	
			'88 (68)	'87 (58)	'88 (172)	'87 (133)
Talked about Congoleum	19%	24%	43%	75%	17%	29%
Armstrong	31	38	25	46	51	73
Mannington	8	12	7	15	8	14
Other	5	11	3	17	7	12
Don't know, none	58	50	52	42	42	24

Q.42 What did the retailer tell you about...?

(MANUFACTURER DISCUSSED)	---CONGOLEUM---		---ARMSTRONG---		---MANNINGTON---	
	1988 (112)	1987 (144)	1988 (195)	1987 (228)	1988 (57)	1987 (72)
Acceptable brand	19%	20%	16%	24%	9%	22%
Best brand	1	6	6	9	-	9
Durability	24	21	37	25	-	16
Price	16	13	18	13	11	11
Color	14	8	3	7	6	7
No-wax/never-wax	7	7	9	9	3	9
Quality	2	6	7	6	-	3
Warranty	8	7	7	6	-	1
Design/Pattern	14	3	5	4	4	6
Other	5	7	7	10	-	7
Don't recall	25	11	22	33	77	46

Retailer recommendation

As found in 1987, only a small proportion of respondents this year said a retailer recommended a particular brand of sheet vinyl flooring. Armstrong continues to be the brand most recommended to consumers by retailers who do recommend a brand.

In 1988, no respondent recalled being recommended more than one brand of flooring, accounting for the decrease of recommendation of all brands.

Also this year, the percentage of purchasers of Congoleum who were recommended a brand decreased. Conversely, the percentage of Armstrong purchasers who were recommended a brand increased slightly.

Q.43 Did the retailer recommend any particular manufacturer?

Q.44 Which one?

(NUMBER OF RESPONDENTS)	TOTAL 1988 (604)	TOTAL 1987 (600)	-----PURCHASED-----			
			CONGOLEUM		ARMSTRONG	
			88'	87'	88'	87'
			(68)	(58)	(172)	(133)
Retailer did recommend a manufacturer	12%	10%	6%	13%	18%	15%
Retailer didn't recommend manufacturer	51	51	88	86	76	78
Don't know, did not talk with retailer	38	39	7	1	6	6
(ANY RECOMMENDATION)	(70)	(60)	(15)	(8)	(46)	(20)
Armstrong	65%	68%	BASES TOO			
Congoleum	21	31				
Mannington	10	14	SMALL FOR			
Other	-	8	MEANINGFUL			
Don't know	4	10	COMPARISONS			

Brand purchased

Between 1984 and 1988, the percentage of respondents who purchased Congoleum sheet vinyl flooring remained stable at approximately 22%. In comparison, the percentage who have purchased Armstrong has increased from 43% in 1984 to 54% in 1988.

The growth in market share Mannington had between 1984 and 1987 did not continue in 1988. Allowing for statistical error, Mannington at best maintained its market share this past year.

FORM B ONLY - Q.45 Who manufactured the sheet vinyl flooring you purchased for your ...?

Q.46 Why did you choose (manufacturer) for your (room)?

(NUMBER OF RESPONDENTS WHO PURCHASED SHEET VINYL IN PAST 2 YRS)	1988 (325)	1987 (280)	1984 (125)
Congoleum	22%	22%	23%
Armstrong	54	46	43
Mannington	7	10	2
GAF/Tarkett	3	2	1
Other	2	3	5
Don't know	13	19	26

Room brand purchased for

Because the percentage of respondents who purchased flooring for rooms other than the kitchen or full bath are small, the following table combines the data from the 1987 research with the data from this research to increase the sample sizes. The results indicate that Armstrong is the most frequently purchased brand of sheet vinyl flooring, regardless of which room the flooring is purchased for.

(NUMBER OF RESPONDENTS)	--ROOM PURCHASED FLOORING-1987 AND 1988--					
	KIT- CHEN (483)	FULL BATH (234)	HALF BATH (36)	FOYR (63)	FMLY ROOM (42)	BASE MENT (18)
Congoleum	23%	23%	22%	18%	18%	9
Armstrong	50	56	52	49	59	65
Mannington	8	6	10	7	8	8
GAF/Tarkett	3	3	5	6	9	-
Other	3	1	-	5	2	-
Don't know	16	19	21	22	17	19

Reason for purchase

Overall, consumers say they purchase brands for four main reasons: color, design or pattern, price, and durability or quality.

We found (in the research conducted among sheet vinyl flooring retailers) that durability or quality most determines a retailer's preference for a particular brand. Keeping this in mind, we note that 31% of Armstrong purchasers chose Armstrong for its durability or quality. Conversely, only 15% of Congoleum purchasers mentioned the durability or quality of Congoleum flooring. Mannington was also chosen more often for its durability or quality than was Congoleum, though the sample size is very small.

Aesthetics are important to the consumer - all purchasers (regardless of the brand purchased) indicate so. However, though Congoleum is chosen most often for its color or design, it is not the most frequently chosen brand.

Q.46 Why did you choose (manufacturer) for your room?

(BRAND PURCHASED)	---CONGOLEUM---		---ARMSTRONG---		---MANNINGTON---	
	1988 (68)	1987 (58)	1988 (172)	1987 (133)	1988 (24)	1987 (29)*
Color	41%	40%	33%	47%	43%	35%
Design/Pattern	37	37	26	34	51	53
Price	25	18	22	17	20	23
Durability	7	15	22	14	12	19
Quality	8	9	9	5	14	2
Looks	6	9	7	2	7	6
Brand reputation	10	5	16	10	24	6
Recommended, previous experience	9	5	8	6	11	-
Ease of care	11	na	11	na	7	na
Other	10	10	12	18	12	12

* Care should be taken when comparing Mannington to Armstrong and Congoleum. Due to the small sample size the margin of error is greater.

Satisfaction among purchasers

The percentage of Congoleum purchasers who say they would purchase the same brand again decreased in 1988 as a result of an increase of "don't know" responses. However, the number of Congoleum purchasers who would recommend Congoleum and who are satisfied with their Congoleum floor remains high.

Satisfaction with Armstrong sheet vinyl flooring is also high and continues to be somewhat higher than is the satisfaction with Congoleum flooring.

- Q.58 Would you purchase the same brand if you were going to buy vinyl flooring for another room in your home?
 Q.60 Would you recommend the brand you purchased to a friend or relative?
 Q.61 How would you rate your satisfaction with the vinyl flooring you purchased?

(NUMBER OF PURCHASERS)	---TOTAL---		-----PURCHASED-----			
	1988	1987	CONGOLEUM		ARMSTRONG	
	1988	1987	1988	1987	1988	1987
	(325)	(280)	(68)	(58)	(172)	(133)
Would purchase same brand	75%	79%	69%	80%	81%	88%
Wouldn't purchase same brand	10	11	12	11	9	6
Don't know	14	10	19	9	10	7
Would recommend purchased brand	86%	88%	86%	88%	89%	93%
Very satisfied with purchase	78%	76%	76%	71%	82%	79%
Somewhat satisfied	14	19	15	19	12	19
Not at all satisfied	5	4	7	10	3	1

Brand which stands out in intenders' minds

There was a 7% increase among 1988 respondents who intend to purchase Congoleum sheet vinyl flooring compared to last year. Intent to purchase Armstrong or Mannington was unchanged.

Armstrong is the brand which most often stands out in the minds of intenders.

Reasons why a manufacturer stands out varied this year compared to 1987. The brand reputation of both Congoleum and Armstrong as a reason decreased among intenders. However, brand reputation continued to be the most-cited reason that Armstrong stands out, along with advertising and design.

Among 1988 respondents, Congoleum stands out for its color and design, and advertising.

We note the increase of responses naming both Armstrong and Congoleum colors and advertising in 1988 compared to 1987.

Mention of design, durability, price, and the look of the product fluctuated over the past year.

FORM C ONLY: Q.40a Of the manufacturers you've looked at, which one stands out in your mind?

Q.40b Why does that one stand out in your mind?

(NUMBER OF INTENDERS WHO HAVE LOOKED AT MANUFACTURERS)	---INTENDERS---	
	1988 (183)	1987 (179)
BRAND WHICH STANDS OUT		
Armstrong	49%	50%
Congoleum	27	20
Mannington	6	6
Other	6	6
Don't know, none	17	19

(MANUFACTURER THAT STANDS OUT)	--CONGOLEUM--		--ARMSTRONG--	
	1988 (43)	1987 (36)	1988 (91)	1987 (91)
Reputation	8%	30%	24%	39%
Design	23	18	23	18
Durability	15	18	14	9
Price	11	16	8	3
Attractive	13	11	7	3
Color	23	8	17	8
Advertisement	19	2	23	15
Ease of care	6	7	5	1
First looked at	2	6	2	6
Warranty	6	3	5	2
Other	26	6	14	15

Brand preference

Armstrong continues to be the brand the majority of respondents would consider first.

First preference for Armstrong among purchasers increased significantly in 1987 compared to 1984 and increased somewhat more this year. Preference for Armstrong among intenders has steadily increased over the past four years.

First preference for Congoleum has changed insignificantly among purchasers. Preference for Congoleum did increase among intenders to 20% compared to an average of 15% in the two previous studies.

Reflected in the decrease of "don't know" responses, intenders from this research are more focused on brands they would consider than previously.

As in 1987, if a respondent's first preference is Congoleum, their second preference is generally Armstrong. Likewise, if Armstrong is the first preference, Congoleum is the second preference.

Q.13A If you were going to buy sheet vinyl flooring in the next two years, which company's products would you consider first?

(NUMBER OF RESPONDENTS)	-----PURCHASERS-----			-----INTENDERS-----		
	1988 (325)	1987 (280)	1984 (125)	1988 (279)	1987 (320)	1984 (125)
FIRST PREFERENCE						
Congoleum	18%	19%	21%	20%	14%	15%
Armstrong	55	52	39	61	48	34
Mannington	7	8	1	5	3	1
Other	4	4	10	4	5	8
Don't know	16	18	30	12	31	42

SECTION V
SOME MISCELLANEOUS ISSUES

Durability in a flooring
Brand name appeal
Never-wax flooring
Inlaid flooring

Durability issues

On average, respondents believe that the sheet vinyl flooring product they purchase will keep its shine for 8 years.

There was no appreciable difference among those who purchased Armstrong and those who purchased Congoleum in their opinion of how long their floor would keep its shine.

For both "how long ... before colors fade" and "how long ... before floor shows stains" there were no significant differences between Armstrong and Congoleum purchasers.

The general public does expect a floor to keep its color between 1 and 2 years longer than they expect it to keep its shine, or to show dirt from wear.

Both purchasers of sheet vinyl flooring and those who plan to purchase sheet vinyl flooring expect to have to clean it with more than water about once every two weeks (average 2.1 weeks).

The majority of respondents expect sharp objects to puncture or cut sheet vinyl floorings on impact. Promotion of a product which resists tearing or puncturing should be appealing to consumers.

- Q.12Ea About how long do you think your sheet vinyl floor will keep its shine?
 Q.12Eb How long do you expect it to be before the colors start to fade?
 Q.12Ec Before the floor shows stains from dirty shoes or spills that you can't easily get out?
 Q.12Ed How often do you expect to have to clean the floor with more than just water?
 Q.12f If someone in your household drops a knife or pointed object on your sheet vinyl floor, do you think it will puncture or cut the floor?

	TOTAL 1988 (604)	-----PURCHASED----- CONGOLEUM (68)	ARMSTRONG (172)
(NUMBER OF RESPONDENTS)			
KEEP SHINE:			
Average number of years	8.0	8.8	8.7
COLORS START TO FADE:			
Average number of years	9.6	10.4	10.4
SHOWS STAINS:			
Average number of years	8.9	9.7	10.1
CLEAN FLOORING WITH MORE THAN WATER:			
Average number of weeks	2.1	2.2	2.0
IF DROP SHARP OBJECT:			
Floor will puncture or cut	63%	69%	58%
Floor will not puncture or cut	28	24	31
Don't know	9	7	11

What "quality and durability" mean to consumers

The words "quality" and "durability" mean many different things to different people. Definitions were generally vague, and sometimes confusing. For example, 22% of respondents define quality/durability as the design, color, or flooring pattern. Many others reiterated the words without providing a clear definition.

Over one-third of respondents say a durable floor is one that is easy to maintain. An additional 20% define a durable floor as one that looks clean or shiny for a long period of time.

Though 18% of respondents define a durable floor as one that "stands up to traffic", the absence of specific issues such as denting, cutting, or scuffing is somewhat surprising.

Clearly, a floor that is easy to clean and looks good is foremost in the minds of consumers when they think of a quality or durable floor.

Q.12D. What are the most important characteristics of quality and durability you look for in a vinyl floor?

(NUMBER OF RESPONDENTS)	TOTAL 1988 (604)
General comments re: "durability", "holds up", "stands up"	41%
Easy to clean/maintain	37
Looks cleaner longer	20
Stands up to traffic, children	18
No-wax, never-wax	16
Thickness	6
No seams	5
No denting	3
No cutting	2
Brand Name	2
Design/pattern/color	22
Other	12
Don't know	6

Brand Name Appeal

Respondents were read a series of potential floor covering names and were asked 1) which of the names they thought would last longer, and 2) which of the names they liked best. All respondents were read a list of five names with the prefixes "Perma", "Dura", "Eterna", "Ever", and "Tuff". The sample of respondents were then divided so that one-half were read the prefixes with the suffix "Last" and one-half were read the prefixes with the suffix "Life".

When the suffix "last" is used, respondents are about evenly divided between "Permalast", "Eternalast", and "Duralast" in terms of which they perceive to represent a longer lasting product. "Permalast" and "Duralast" are the names they like best.

When the suffix "life" is used in replacement of "last", respondents clearly perceive "Permalife" as the product most likely to last longer. Respondents like the names "Permalife" and "Duralife" about equally, and show a slight preference for either name over "Eternalife."

Reasons given for name choice generally centered around the name prefix itself. For example, 52% of those who favored "Permalife" did so because it made the product sound "permanent." Perceptions of general durability were mentioned often, as all products suggested durability in their prefix.

When the responses are averaged together, the prefix "Perma" connotes "long-lasting" flooring among the highest majority of respondents. It is also the name liked best. Though "Eterna" is perceived as lasting longer somewhat more than is "Dura", the name "Dura" is preferred. We recommend that "Perma" be considered first for potential use of a brand name while "Dura" be considered as an alternative.

Q.12H Which of the following brands of vinyl flooring do you think would last longer...?

Q.12I Which of these names do you like best for a vinyl floor?

(NUMBER OF RESPONDENTS)	TOTAL ASKED "LAST" (304)	TOTAL ASKED "LIFE" (300)	AVERAGE TOTAL (604)
LASTS LONGER:			
Perma	26%	35%	30%
Eterna	24	27	25
Dura	23	21	22
Ever	15	8	12
Tuff	8	7	7
LIKES BEST:			
Perma	25%	30%	27%
Dura	25	27	26
Eterna	21	22	22
Ever	17	13	15
Tuff	7	7	7

Never-wax flooring

The concept of never-wax flooring is believable to the majority of respondents. However, never-wax flooring is not associated with Mannington.

Over the past two years, almost two-thirds of all respondents more often say that Armstrong or Congoleum manufacture never-wax flooring than does Mannington. In addition, two-thirds of recent purchasers of Armstrong or Congoleum claim that their flooring is "never-wax."

The percentage of respondents who believe there is a difference between no-wax flooring and never-wax flooring did increase to 27% in 1988 compared to 18% in 1987. Nevertheless, the majority of respondents still do not know, or do not believe there is, an actual difference.

- Q.49 If a manufacturer claimed that its sheet vinyl flooring never needed waxing, do you think this claim would be ...?
- Q.50 Are you aware of any manufacturers who currently claim their flooring never needs waxing?
- Q.52 Do you think there is a real difference between no-wax and never-wax floors?

(NUMBER OF RESPONDENTS)	1988 (604)	1987 (600)	1984 (250)
Very believable	22%	34%	33%
Somewhat believable	49%	34	33
Not too believable	16	24	24
Not at all believable	9	4	9
Don't know	4	3	2
There is a difference between no-wax and never-wax floors	27%	18%	31%
No difference/don't know	72	82	69
AWARE OF MANUFACTURERS WHO CLAIM NEVER-WAX	61%	63%	58%
Congoleum	24%	25%	29%
Armstrong	35	34	37
Mannington	12	15	4
Other	3	3	15
Don't know	16	16	14
NOT AWARE OF MANUFACTURER/DON'T KNOW	40	37	41

Awareness of "inlaid"

Respondents' awareness of inlaid vinyl flooring has steadily decreased over the past four years. the lower awareness level among respondents is reflected in the significantly smaller percentage of intenders who are likely to purchase inlaid, as well as in the somewhat smaller percentage of purchasers of inlaid flooring.

Armstrong is most often named as a manufacturer of inlaid flooring. The percentage of respondents who have heard of inlaid flooring, and who name Congoleum as a manufacturer, has decreased to 19% in 1988 compared to 29% in 1984.

- Q.54 Have you ever heard of inlaid sheet vinyl flooring?
 Q.55 What manufacturers of sheet vinyl flooring offer inlaid vinyl flooring?
 FORM C: Q.56 How likely is it that you will purchase an inlaid vinyl floor?
 FORM B: Q.56 Did you purchase inlaid sheet vinyl flooring?

	1988 (604)	1987 (600)	1984 (250)
(NUMBER OF RESPONDENTS)			
AWARE OF INLAID	34%	44%	54%
MANUFACTURER OF INLAID	*(217)	(261)	(135)
Armstrong	39%	35%	35%
Congoleum	19	21	29
Mannington	10	11	2
Don't know	53	57	58
NOT AWARE OF INLAID/DON'T KNOW	67	56	46
PURCHASE OF INLAID AMONG INTENDERS:	*(95)	(124)	(na)
Very likely	22%	33%	
Somewhat likely	31	30	
Not at all likely	26	24	
Don't know	21	14	
ACTUAL PURCHASE OF INLAID	*(122)	(137)	(na)
Did purchase inlaid	28%	32%	
Didn't purchase inlaid	57	55	
Don't know	15	14	

* Bases are those respondents who have heard of inlaid flooring.

na = not available

APPENDIX A
SCREEN SHEET

SCREEN SHEET FLOOR COVERING SURVEY -- RI005

TELEPHONE NO. _____
 TIME BEGUN _____ LOCATION CODE _____ (105-109) (101-104)
 FOR RL USE ONLY

1=110

Hello, this is _____, calling for R L Associates, a marketing research firm in Princeton, New Jersey. We are doing a study with women in your area about home decorating. May I speak with the woman in the house who is primarily responsible for making decisions about decorating the home?

GO THROUGH INTRODUCTION AGAIN, IF NECESSARY

Your answers will be completely confidential. They will be summarized with the responses of other women before they are given to the company for which we are conducting the research.

- A. Are you over 18 years of age? 1 YES -- GO TO B
 2 NO -- TERMINATE
- B. Is anyone in your household employed by an advertising agency, a public relations firm, a market research firm, or a manufacturer/distributor of home furnishings?
 1 YES -- GO TO FORM A, QA IF DEMOS REQUIRED.
 TERMINATE IF DEMOS NOT REQUIRED. (111)
 2 NO -- GO TO C
- C. Have you purchased any type of floor covering for your kitchen, bath, foyer, family room or basement within the past two years? 1 YES -- GO TO D (112)
 2 NO -- GO TO E
- D. What kind of covering did you purchase? (READ LIST)
 1 Wood flooring -- GO TO E (113)
 2 Ceramic tiles -- GO TO E
 3 Sheet vinyl, that is, floor covering that comes in large sections or sheets -- GO TO FORM B
 4 Linoleum -- GO TO FORM B
 5 Vinyl tiles -- GO TO E
 6 Carpeting -- GO TO E
 0 OTHER ----- -- GO TO E
- E. Do you plan to buy sheet vinyl covering or linoleum, that is the type of floor covering that comes in large sections or sheets, not tiles, for your kitchen, bath, foyer, family room, or basement within the next two years?
 1 YES -- GO TO FORM C (114)
 2 NO } IF YES IN C, GO TO FORM A, Q1.
 3 DK } IF NO IN C AND DEMOS NEEDED, GO TO FORM D.
 IF NO IN C AND IF DEMOS NOT NEEDED, TERMINATE

APPENDIX B

FORM A: PURCHASERS OF NON-SHEET VINYL FLOORING

FORM A -- DID NOT PURCHASE SHEET VINYL WITHIN THE PAST TWO YEARS
PURCHASED OTHER FLOORING

401:404 (BALLOT)

4=410

1. Why did you choose (FLOORING FROM Q.D ON SCREEN)?

(411/412)

2. Was the choice of floor covering made only by you, by you and other family members, or by someone else?

- 1 SELF (413)
2 SELF AND FAMILY
3 SOMEONE ELSE
4 DK, REFUSED

IF SOMEONE ELSE, ASK:

3. Who else participated in the decision?

- 1 INTERIOR DECORATOR (414)
2 ARCHITECT
3 OTHER (SPECIFY):

4. Before you purchased (FROM D ON SCREEN), did you consider sheet vinyl flooring as a potential covering?

- 1 YES - GO TO Q4 (415)
2 NO - GO TO Q7
3 DK - GO TO Q7

IF YES TO Q4, ASK:

5. Did you look at sheet vinyl flooring in a store?

- 1 YES (416)
2 NO 3 DK

6. Why didn't you choose sheet vinyl as a floor covering?

(417)
GO TO Q.9

IF NO TO Q.4, ASK:

7. What other types of floor coverings did you look at in a store?

- 1 VINYL TILES (418)
2 CERAMIC TILES
3 CARPETING
4 WOOD
5 NONE 6 DK

8. Why didn't you consider sheet vinyl flooring?

(419)

9. Was the flooring you purchased for a new home or was it a replacement for existing flooring?

- 1 NEW HOME (420)
2 REPLACEMENT

10. Did you purchase flooring for a residence you own or rent?

- 1 OWN (421)
2 RENT
3 REFUSED

11. Is that residence a (READ LIST)

- 1 Single family house (422)
2 Multi-family house
3 Townhouse
4 Condominium
5 Apartment
6 REFUSED

APPENDIX C

FORM B: PAST PURCHASERS OF SHEET VINYL FLOORING

- 1 -
 FLOOR COVERING SURVEY -- RI004
 FORM B -- PURCHASED SHEET VINYL FLOORING WITHIN TWO YEARS

What company first comes to mind when you think of sheet vinyl floor covering? (DO NOT READ LIST -- ACCEPT ONE ANSWER ONLY. RECORD BELOW IN COLUMN UNDER Q1)

2. What other companies come to mind? (PROBE: Any others?) (DO NOT READ LIST. RECORD BELOW IN COLUMN UNDER Q.2)

FOR EACH COMPANY NOT NAMED IN Q.1 OR Q.2. ASK:

3. Have you heard of COMPANY sheet vinyl flooring? (RECORD BELOW IN COLUMN UNDER Q.3)

	<u>Q.1</u> (115)	<u>Q.2</u> (116)	<u>Q.3</u> (117)
ARMSTRONG	1	1	1
CONGOLEUM	2	2	2
MANNINGTON	3	3	3
GAF/TARKETT	4	4	4
SEARS	5	5	5
OTHER: -----	6	6	6
OTHER: -----	7	7	7
DON'T KNOW, NONE	8	8	

Which manufacturers of sheet vinyl floor covering have you seen or heard advertisements for in the past three or four months? (DO NOT READ LIST -- CIRCLE ANY MENTIONED UNDER "UNAIDED" COLUMN)

	<u>UNAIDED</u> (118)	<u>AIDED</u> (119)
ARMSTRONG	1	1
CONGOLEUM	2	2
MANNINGTON	3	3
GAF/TARKETT	4	4
SEARS	5	5
OTHER -----	6	
OTHER -----	7	
NONE	8	
DON'T KNOW	9	

FOR EACH COMPANY NOT MENTIONED IN Q.4. ASK:

5. Have you seen or heard any advertisements for COMPANY sheet vinyl flooring in the past three or four months? (IF YES, CIRCLE NUMBER UNDER "AIDED" COLUMN ABOVE)

IF CONGOLEUM MENTIONED IN 4 OR 5. ASK:

6. Where did you see or hear advertising for Congoleum? (DO NOT READ LIST -- CIRCLE ANY MENTIONED)

1	TELEVISION	(120)
2	MAGAZINES	
3	NEWSPAPERS	
4	RADIO	
5	STORE	
6	OTHER: -----	
7	DON'T KNOW	

12. Did you look at any types of flooring in a store before you purchased sheet vinyl flooring?
- 1 YES - GO TO Q.12a
2 NO - Q.12c (126)
3 DK - Q.12c

IF YES, ASK:

- 12a. What other types of flooring did you look at? (CIRCLE AS MANY AS APPLY)
- 1 Vinyl tiles (127)
2 Ceramic tiles
3 Carpet
4 Wood
5 OTHER (SPECIFY):
6 DK - GO TO Q12c

FOR EACH CIRCLED IN Q.12a, ASK:

- 12b. Why did you purchase sheet vinyl instead of...(PROBE: What qualities did you like and dislike about each.)

- 1 Vinyl tiles: (128)
- 2 Ceramic tiles: (129)
- 3 Carpet: (130)
- 4 Wood: (131)
- 5 OTHER: (132)

GO TO Q12d

- 12c. Why did you choose sheet vinyl flooring rather than some other type of flooring, such as carpet, vinyl or ceramic tile, or wood?

(133)

- 12d. What are the most important characteristics of quality and durability you look for in a vinyl floor?

(134)

- 12e. Thinking about the sheet vinyl floor you recently purchased,

- a) About how long do you think your sheet vinyl floor will keep its shine? ☒ MONTHS ☐ YRS (135)
☒ FOREVER ☐ DK
- b) About how long do you expect it to be before the colors start to fade? ☒ MONTHS ☐ YRS (136)
☒ NEVER ☐ DK
- c) About how long do you expect it to be before the floor shows stains from dirty shoes or spills that you can't easily get out? ☒ MONTHS ☐ YRS (137)
☒ NEVER ☐ DK
- d) How often do you expect to have to clean the floor with more than just water? EVERY ☐ WEEK(S) (138/39)
EVERY ☐ MNTH(S)
☒ NEVER ☐ DK

15. Now I'd like you to rate sheet vinyl floor covering by different manufacturers on each of the characteristics I'm going to read. Based on what you know, or might think, please rate the products of these manufacturers of vinyl floor covering as excellent, good, fair, or poor. How would you rate COMPANY on CHARACTERISTIC? Would you rate it as excellent, good, fair, or poor? (IF RESPONDENT SAYS "Don't know" LEAVE BLANK FOR THAT CATEGORY AND COMPANY)

	----CONGOLEUM----				----ARMSTRONG----				----MANNINGTON----			
	EXC	GOOD	FR	PR	EXC	GOOD	FR	PR	EXC	GOOD	FR	PR
Being a company that is a leader in fashionable styles and designs	----(152)----				----(153)----				----(154)----			
	4	3	2	1	4	3	2	1	4	3	2	1
Being a company that makes flooring that keeps looking good over time	----(155)----				----(156)----				----(157)----			
	4	3	2	1	4	3	2	1	4	3	2	1
Being a leading company in the sheet vinyl flooring business	----(158)----				----(159)----				----(160)----			
	4	3	2	1	4	3	2	1	4	3	2	1
Being a company that makes flooring that would look good in a number of rooms in the house	----(161)----				----(162)----				----(163)----			
	4	3	2	1	4	3	2	1	4	3	2	1
Being a company that makes flooring that is stain resistant	----(164)----				----(165)----				----(166)----			
	4	3	2	1	4	3	2	1	4	3	2	1

16. Based on what you know, or might think, using a scale of 1 to 4 where one stands for Poor and 4 stands for Excellent, please rate each of these manufacturers on each of the following:

	POOR				EXCELLENT				DK	
DESIGNS										
Armstrong	1	2	3	4					5	(167)
Congoleum	1	2	3	4					5	(168)
Mannington	1	2	3	4					5	(169)
COLORS										
Armstrong	1	2	3	4					5	(170)
Congoleum	1	2	3	4					5	(171)
Mannington	1	2	3	4					5	(172)
GOOD VALUE FOR THE PRICE										
Armstrong	1	2	3	4					5	(173)
Congoleum	1	2	3	4					5	(174)
Mannington	1	2	3	4					5	(175)
DURABILITY OF FLOORING										
Armstrong	1	2	3	4					5	(176)
Congoleum	1	2	3	4					5	(177)
Mannington	1	2	3	4					5	(178)

cont'd on next page

END CARD 1

22. Did you replace the flooring in your (ROOM) ... (READ CATEGORIES, RECORD NUMBER(S) FOR EACH ROOM/AREA CIRCLED IN 17)

- 1 As part of overall re-decorating,
- 2 because the flooring was worn,
- 3 you didn't like the color
- 4 you didn't like the design
- 5 you didn't like type of flooring
- 6 you wanted a no-wax finish
- 0 you wanted a floor that was easier to take care of
- X OTHER: _____

KITCHEN _____ (241)

FOYER _____ (242)

FULL BATH _____ (243)

FAMILY ROOM _____ (244)

HALF BATH (POWDER ROOM) _____ (245)

BASEMENT _____ (246)

Q.23 OMITTED

SKIP 247

24. How many months went by from the time you first thought about purchasing floor covering to the time you looked at it in a store? _____ MONTHS (248)
 _____ YEARS
 Y DON'T KNOW

25. How many months went by from the time you looked in a store to the time you made a selection? _____ MONTHS (249)
 _____ YEARS
 Y DON'T KNOW

26. From which of the following types of stores did you purchase your sheet vinyl flooring? [READ CATEGORIES] (250)

- 1 A flooring store that sells only sheet vinyl and vinyl tile flooring?
- 2 A flooring store that sells all types of flooring, including carpeting?
- 3 A store that sells flooring, paint, and wallpaper products?
- 4 A home center, hardware store, or lumberyard?
- 5 A store that specializes in decorating rooms such as kitchens or baths?
- 6 OTHER (volunteered): _____
- 7 DON'T KNOW, REFUSED

27. Was the choice of floor covering made only by you, by you and other members of your family, or by a professional such as an interior decorator or architect? 1 SELF -- GO TO 29 (251)
 2 SELF AND FAMILY -- GO TO
 3 PROFESSIONAL Q.28

IF SELF AND FAMILY OR PROFESSIONAL TO 27, ASK:

28. How did FROM Q27 participate in the decision? For example, chose the manufacturer, chose the color, determined the amount of money to be spent, etc. (LIST EACH PERSON AND HOW EACH PARTICIPATED)

(252)

33. Which one of these characteristics of sheet vinyl flooring was most important when you made your selection? (READ LIST BELOW, IF NECESSARY)

34. Assuming 2 or more manufacturers were equal in the characteristics just mentioned, what would be the next most important characteristic? (READ LIST BELOW, IF NECESSARY)

	Q.33 (267)	Q.34 (268)
Color	1	1
Design	2	2
Durability	3	3
Quality	4	4
Manufacturer's warranty	5	5
Price, including any special sales or rebates	6	6
Brand name reputation	7	7
Stain resistance	8	8
No seams in flooring	9	9
No-wax	0	0
Ease of care	X	X
Scuff resistance	Y	Y

35. You said that (FROM Q33) was most important when you made your selection: Where did you FIRST receive information about that characteristic? (DO NOT READ CATEGORIES. RECORD BELOW)

	Q.35 FIRST (269)	Q.36 OTHERS (270)
MAGAZINE ADS	1	1
NEWSPAPER ADS	2	2
MAGAZINE ARTICLES	3	3
RETAILER	4	4
FRIENDS, RELATIVES	5	5
BROCHURE	6	6
OTHER _____	7	7
OTHER _____	8	8
NO INFORMATION	0	0
DON'T KNOW	X	X

IF MAGAZINE ADS OR ARTICLES (1 OR 3) CIRCLED ABOVE UNDER FIRST/OTHER, ASK:

31. From which magazines did you receive information?

(271)

37. When you went into the store to buy your sheet vinyl flooring, did you have a specific manufacturer in mind whose flooring you wanted to look at?

1 YES (272)
2 NO
3 DON'T KNOW

IF YES, ASK:

38. Which manufacturer(s) did you want to look at? (DO NOT READ CATEGORIES)

1 ARMSTRONG (273)
2 CONGOLEUM
3 MANNINGTON
4 TARKETT
5 OTHER _____ 6 DK

39. About how many stores did you visit before you made your purchase?

_____ STORES (274)

45. Who manufactured the sheet vinyl flooring you purchased for your _____?
(READ EACH ROOM/AREA MENTIONED IN 17 AND RECORD NUMBER OF MANUFACTURER ON
LINE -- DO NOT READ LIST OF MANUFACTURERS)

- 1 ARMSTRONG
- 2 CONGOLEUM
- 3 GAF/TARKETT
- 4 MANNINGTON
- 5 OTHER _____
- 6 OTHER _____
- 7 DON'T KNOW

KITCHEN _____ (313) FOYER _____ (314)

FULL BATH _____ (315) FAMILY ROOM _____ (316)

HALF BATH (POWDER ROOM) _____ (317) BASEMENT _____ (318)

INTERVIEWER: LOOK BACK TO Q37/38. IF "NO" OR "DK" RESPONSE IN Q37 OR Q.38
RESPONSE OF MANUFACTURER IS SAME AS Q.45 CONTINUE WITH Q.46

IF Q.38 ANSWERED, AND MANUFACTURER DIFFERENT THAN IN Q.45, ASK Q48

46. Why did you choose (MANUFACTURER) for your (ROOM)? (LIST MANUFACTURER,
ROOM, AND RESPONSE)

(319)

(320)

(321)

(322)

GO TO Q48

47. Why did you buy a different brand from the one you had in mind when you
went to the store?

(323)

48. Who installed the flooring in your (FROM 17)? (READ LIST -- CIRCLE ANY
MENTIONED)

	<u>KITCHEN</u>	<u>FULL BATH</u>	<u>HALF BATH</u>	<u>FOYER</u>	<u>FAMILY ROOM</u>	<u>BASE MENT</u>	
You	1	2	3	4	5	6	(324)
Your husband/partner	1	2	3	4	5	6	(325)
A member of your family, friends	1	2	3	4	5	6	(326)
The retailer provided the installation	1	2	3	4	5	6	(327)
A professional installer hired by you	1	2	3	4	5	6	(328)

50. Would you recommend the brand you purchased to a friend or relative? 1 YES (341)
2 NO
3 DON'T KNOW (342)
61. How would you rate your satisfaction with the vinyl flooring you purchased? 1 VERY SATISFIED - GO TO A BELOW
2 SOMEWHAT SATISFIED - GO TO Q62
Are you very satisfied, somewhat satisfied, or not at all satisfied? 3 NOT AT ALL SATISFIED GO TO 62

IF SOMEWHAT OR NOT AT ALL SATISFIED TO 61, ASK:

62. Why aren't you satisfied?

(343)

Now, I'd like to ask you a few final questions for statistical purposes.

- A. How long have you been living at your present address? 1 1 YEAR OR LESS (344)
2 BETWEEN 1 AND 2 YEARS
3 BETWEEN 2 AND 3 YEARS
4 3 TO LESS THAN 6 YEARS
5 6 TO LESS THAN 10 YEARS
6 10 YEARS OR LONGER
0 REFUSED
- B. Do you plan on moving within the next two years? 1 YES (345)
2 NO
3 DON'T KNOW
- C. Into which of the following age groups does your age fall? 1 18 - 24 6 50 - 59 (346)
2 25 - 29 7 60 - 64
3 30 - 34 8 OVER 65
4 35 - 39 9 REFUSED
5 40 - 49
- D. What is the last grade you completed in school? (READ CATEGORIES IF RESPONDENT HESITATES) 1 Grade school (347)
2 Some high school
3 Completed high school
4 Some college
5 Completed college
6 Graduate school or more
7 REFUSED

APPENDIX D

FORM C: POTENTIAL PURCHASERS OF SHEET VINYL FLOORING

FLOOR COVERING SURVEY -- RI004
FORM C -- POTENTIAL PURCHASER OF SHEET VINYL FLOORING WITHIN TWO YEARS

What company first comes to mind when you think of sheet vinyl floor covering? (DO NOT READ LIST -- ACCEPT ONE ANSWER ONLY. RECORD BELOW IN COLUMN UNDER Q1)

2. What other companies come to mind? (PROBE: Any others?) (DO NOT READ LIST. RECORD BELOW IN COLUMN UNDER Q.2)

FOR EACH COMPANY NOT NAMED IN Q.1 OR Q.2, ASK:

3. Have you heard of COMPANY sheet vinyl flooring? (RECORD BELOW IN COLUMN UNDER Q.3)

	<u>Q.1</u> (115)	<u>Q.2</u> (116)	<u>Q.3</u> (117)
ARMSTRONG	1	1	1
CONGOLEUM	2	2	2
MANNINGTON	3	3	3
GAF/TARKETT	4	4	4
SEARS	5	5	5
OTHER: -----	6	6	6
OTHER: -----	7	7	7
DON'T KNOW. NONE	8	8	

Which manufacturers of sheet vinyl floor covering have you seen or heard advertisements for in the past three or four months? (DO NOT READ LIST -- CIRCLE ANY MENTIONED UNDER 'UNAIDED' COLUMN)

	<u>UNAIDED</u> (118)	<u>AIDED</u> (119)
ARMSTRONG	1	1
CONGOLEUM	2	2
MANNINGTON	3	3
GAF/TARKETT	4	4
SEARS	5	5
OTHER -----	6	
OTHER -----	7	
NONE	8	
DON'T KNOW	9	

FOR EACH COMPANY NOT MENTIONED IN Q.4, ASK:

5. Have you seen or heard any advertisements for COMPANY sheet vinyl flooring in the past three or four months? (IF YES, CIRCLE NUMBER UNDER 'AIDED' COLUMN ABOVE)

IF CONGOLEUM MENTIONED IN 4 OR 5, ASK:

6. Where did you see or hear advertising for Congoleum? (DO NOT READ LIST -- CIRCLE ANY MENTIONED)

- 1 TELEVISION (120)
- 2 MAGAZINES
- 3 NEWSPAPERS
- 4 RADIO
- 5 STORE
- 6 OTHER: -----
- 7 DON'T KNOW

12. Have you looked at any types of flooring in a store other than sheet vinyl flooring?
- 1 YES - GO TO Q.12a (126)
2 NO - Q.12c
3 DK - Q.12c

IF YES, ASK:

- 12a. What other types of flooring did you look at? (CIRCLE AS MANY AS APPLY)
- 1 Vinyl tiles (127)
2 Ceramic tiles
3 Carpet
4 Wood
5 OTHER (SPECIFY):
6 DK - GO TO Q12c

FOR EACH CIRCLED IN Q.12a, ASK:

- 12b. Why do you expect to purchase sheet vinyl instead of...(PROBE: What qualities did you like and dislike about each.)

- 1 Vinyl tiles: (128)
2 Ceramic tiles: (129)
3 Carpet: (130)
4 Wood: (131)
5 OTHER: (132)

GO TO Q12d

- 12c. Why do you expect to purchase sheet vinyl flooring rather than some other type of flooring, such as carpet, vinyl or ceramic tile, or wood? (133)

- 12d. What are the most important characteristics of quality and durability you look for in a vinyl floor? (134)

- 12e. Thinking about the sheet vinyl floor you plan to purchase,

- a) About how long do you think your sheet vinyl floor will keep its shine? MONTHS YRS (135)
 X FOREVER Y DK
- b) About how long do you expect it to be before the colors start to fade? MONTHS YRS (136)
 X NEVER Y DK
- c) About how long do you expect it to be before the floor shows stains from dirty shoes or spills that you can't easily get out? MONTHS YRS (137)
 X NEVER Y DK
- d) How often do you expect to have to clean the floor with more than just water? EVERY WEEK(S) (138/39)
EVERY MONTH(S)
 X NEVER Y DK

15. Now I'd like you to rate sheet vinyl floor covering by different manufacturers on each of the characteristics I'm going to read. Based on what you know, or might think, please rate the products of these manufacturers of vinyl floor covering as excellent, good, fair, or poor. How would you rate COMPANY on CHARACTERISTIC? Would you rate it as excellent, good, fair, or poor? (IF RESPONDENT SAYS "Don't know" LEAVE BLANK FOR THAT CATEGORY AND COMPANY)

	----CONGOLEUM----				----ARMSTRONG----				----MANNINGTON----			
	EXC	GOOD	FR	PR	EXC	GOOD	FR	PR	EXC	GOOD	FR	PR
Being a company that is a leader in fashionable styles and designs	4	3	2	1	4	3	2	1	4	3	2	1
Being a company that makes flooring that keeps looking good over time	4	3	2	1	4	3	2	1	4	3	2	1
Being a leading company in the sheet vinyl flooring business	4	3	2	1	4	3	2	1	4	3	2	1
Being a company that makes flooring that would look good in a number of rooms in the house	4	3	2	1	4	3	2	1	4	3	2	1
Being a company that makes flooring that is stain resistant	4	3	2	1	4	3	2	1	4	3	2	1

16. Based on what you know, or might think, using a scale of 1 to 4 where one stands for Poor and 4 stands for Excellent, please rate each of these manufacturers on each of the following:

	POOR		EXCELLENT		DK	
DESIGNS						
Armstrong	1	2	3	4	5	(167)
Congoleum	1	2	3	4	5	(168)
Mannington	1	2	3	4	5	(169)
COLORS						
Armstrong	1	2	3	4	5	(170)
Congoleum	1	2	3	4	5	(171)
Mannington	1	2	3	4	5	(172)
GOOD VALUE FOR THE PRICE						
Armstrong	1	2	3	4	5	(173)
Congoleum	1	2	3	4	5	(174)
Mannington	1	2	3	4	5	(175)
DURABILITY OF FLOORING						
Armstrong	1	2	3	4	5	(176)
Congoleum	1	2	3	4	5	(177)
Mannington	1	2	3	4	5	(178)

cont'd on next page

END CARD 1

22. Are you planning to replace the flooring in your (ROOM) ...
(READ CATEGORIES, RECORD NUMBER(S)
FOR EACH ROOM/AREA CIRCLED IN 17)

- 1 As part of overall re-decorating,
- 2 because the flooring is worn,
- 3 you don't like the color
- 4 you don't like the design
- 5 you don't like type of flooring
- 6 you want a no-wax finish
- 0 you want a floor that is
easier to take care of
- X OTHER: _____
- Y DON'T KNOW

KITCHEN _____ (241)

FOYER _____ (242)

FULL BATH _____ (243)

FAMILY ROOM _____ (244)

HALF BATH _____ (245)

BASEMENT _____ (246)

23. How many months have you been thinking of purchasing vinyl flooring?

_____ MONTHS
_____ YEARS (247)

24. How many months have gone by from the time you first thought about purchasing flooring to the time you looked at it in the store?

_____ MONTHS (248)
X NOT LOOKED IN STORE
Y DON'T KNOW

25. In about how many months do you expect to make a decision?

_____ MONTHS (249)
_____ YEARS Y DK

26. From which of the following types of stores do you expect to purchase your sheet vinyl flooring? [READ CATEGORIES]

(250)

- 1 A flooring store that sells only sheet vinyl and vinyl tile flooring?
- 2 A flooring store that sells all types of flooring, including carpeting?
- 3 A store that sells flooring, paint, and wallpaper products?
- 4 A home center, hardware store, or lumberyard?
- 5 A store that specializes in decorating rooms such as kitchens or baths?
- 6 OTHER (volunteered): _____
- 7 DON'T KNOW, REFUSED

27. Who will decide which floor covering to purchase? Will the decision be made only by you, by you and other members of your family, or by a professional such as an interior decorator or architect?

- 1 SELF -- GO TO 29 (251)
- 2 SELF AND FAMILY --GO TO
- 3 PROFESSIONAL -- Q.28

IF SELF AND FAMILY OR PROFESSIONAL TO 27, ASK:

28. How will FROM Q27 participate in the decision? For example, chose the manufacturer, chose the color, determined the amount of money to be spent, etc. (LIST EACH PERSON AND HOW EACH PARTICIPATED)

(252)

33. Which one of these characteristics of sheet vinyl flooring is most important to you when selecting a vinyl floor? (READ LIST BELOW, IF NECESSARY)

34. Assuming 2 or more manufacturers were equal in the characteristics just mentioned, what would be the next most important characteristic? (READ LIST BELOW, IF NECESSARY)

	Q.33 (267)	Q.34 (268)
Color	1	1
Design	2	2
Durability	3	3
Quality	4	4
Manufacturer's warranty	5	5
Price, including any special sales or rebates	6	6
Brand name reputation	7	7
Stain resistance	8	8
No seams in flooring	9	9
No-wax	0	0
Ease of care	X	X
Scuff resistance	Y	Y

35. You said that (FROM Q33) would be most important to you when you made your selection. Have you talked to anyone or obtained any information about that (those) characteristic(s)?

- 1 YES - GO TO Q36 (269)
2 NO - GO TO Q37

IF YES, ASK:

36. Who did you talk to or where did you look for that information? (READ LIST BELOW IF RESPONDENT HESITATES. RECORD BELOW)

IF NO, ASK:

37. Who do you think you will talk to or where do you think you will look for that information? (READ LIST BELOW IF RESPONDENT HESITATES)

	Q.36 (270)	Q.37 (271)
MAGAZINE ADS	1	1
NEWSPAPER ADS	2	2
MAGAZINE ARTICLES	3	3
RETAILER	4	4
FRIENDS, RELATIVES	5	5
BROCHURE	6	6
OTHER _____	7	7
OTHER _____	8	8
NO INFORMATION	0	0
DON'T KNOW	X	X

IF MAGAZINE ADS OR ARTICLES (1 OR 3) CIRCLED ABOVE, ASK:

38. Which magazines have you or will you look at?

(272)

Q.45:47 OMITTED

(SKIP 313:323)

48. Who do you think will install the flooring in your (FROM 17)? (READ LIST, CIRCLE ANY MENTIONED)

	<u>KITCHEN</u>	<u>FULL BATH</u>	<u>HALF BATH</u>	<u>FOYER</u>	<u>FAMILY ROOM</u>	<u>BASE MENT</u>	
You	1	2	3	4	5	6	(324)
Your husband/partner	1	2	3	4	5	6	(325)
A member of your family/friends	1	2	3	4	5	6	(326)
The retailer provided the installation	1	2	3	4	5	6	(327)
A professional installer hired by you	1	2	3	4	5	6	(328)

49. If a manufacturer claimed that its sheet vinyl flooring never needed waxing, do you feel this claim would be: (READ CATEGORIES)

1 VERY BELIEVABLE (329)
2 SOMEWHAT BELIEVABLE
3 NOT TOO BELIEVABLE
4 NOT AT ALL BELIEVABLE
5 DON'T KNOW

50. Are you aware of any manufacturers who currently claim their flooring never needs waxing?

1 YES (330)
2 NO - GO TO Q52
3 DON'T KNOW - Q52

IF YES, ASK:

51. What manufacturers currently claim that their sheet vinyl never needs waxing? (DO NOT READ CATEGORIES)

1 ARMSTRONG (331)
2 CONGOLEUM
3 MANNINGTON
4 OTHER _____
5 DON'T KNOW

52. Would you prefer a no-wax or a never-wax floor?

1 No-wax (332)
2 Never-wax 3 DK

53. Do you think there is a real difference between no-wax and never-wax floors?

1 YES (333)
2 NO 3 DK

54. Have you ever heard of inlaid sheet vinyl flooring?

1 YES (334)
2 NO - GO TO A (DEMOS)
3 DON'T KNOW - GO TO A

55. What manufacturers of sheet vinyl flooring offer inlaid sheet vinyl flooring? (DO NOT READ CATEGORIES)

1 ARMSTRONG (335)
2 CONGOLEUM
3 MANNINGTON
4 OTHER _____
5 DON'T KNOW

56. How likely is it that you will purchase an inlaid vinyl floor? (READ CATEGORIES)

1 Very likely (336)
2 Somewhat likely
3 Not at all likely
4 DON'T KNOW
(SKIP 337:343)

I. Is that residence a (READ LIST)

- 1 Single family house (353)
- 2 Multi-family house
- 3 Townhouse
- 4 Condominium
- 5 Apartment
- 6 REFUSED

J. How many years do you expect to live at the residence
for which you are planning to purchase flooring? _____ yrs(354:55)

K. Do you have any children under
18 years of age living at home?

- 1 YES (356)
- 2 NO -- GO TO M
- 3 REFUSED -- M

IF YES TO K, ASK:

L. How many are (READ LIST)

- | | | |
|----------|-------|-------|
| Under 5 | _____ | (357) |
| 5 to 9 | _____ | (358) |
| 10 to 12 | _____ | (359) |
| 13 to 17 | _____ | (360) |

M. Finally, counting the income of ALL family members who live in your
household and including income from ALL sources, is your total annual
family income (READ LIST)

- 1 Under \$15,000 (361)
- 2 \$15,000 to under \$20,000
- 3 \$20,000 to under \$25,000
- 4 \$25,000 to under \$30,000
- 5 \$30,000 to under \$40,000
- 6 \$40,000 to under \$50,000
- 7 \$50,000 or more
- 8 DON'T KNOW, REFUSED

That completes the interview. Thank you very much for your time.

TIME COMPLETED _____

INTERVIEWER INITIALS _____

APPENDIX E
DEMOGRAPHIC CHARACTERISTICS

Demographic profile of respondents

(NUMBER OF RESPONDENTS)			-----PURCHASED-----				-----PURCHASED----	
	TOTAL 1988 (604)	TOTAL 1987 (600)	CONGOLEUM		ARMSTRONG		NON-SHEET VINYL	
			88' (68)	87' (58)	88' (172)	87' (133)	88' (302)	87' (316)
RESPONDENT AGE								
18 - 34	36%	39%	31%	44%	33%	35%	25%	29%
35 - 59	55	48	62	53	55	52	51	48
60 or older	9	12	7	12	12	12	23	22
EDUCATION								
Some high school or less	18%	22%	16%	30%	20%	14%	9%	21%
High school complete	38	39	43	35	36	49	38	36
Some college or more	44	38	40	35	45	37	51	43
INCOME								
Under \$15,000	8%	11%	5%	11%	8%	11%	5%	10%
\$15,000 - under \$25,000	19	20	14	20	19	18	18	13
\$25,000 - under \$40,000	30	29	26	24	29	23	26	24
\$40,000 or more	29	28	38	33	33	35	32	26
MARRIED	80%/	85%	86%	85%	83%	87%	81%	84%
OWN RESIDENCE	91%	91%	94%	95%	93%	93%	93%	90%
SINGLE FAMILY HOUSE	91%	87%	90%	92%	92%	86%	87%	87%
CHILDREN IN HOUSEHOLD	55%	52%	60%	54%	50%	52%	na	na
YEARS EXPECT TO LIVE IN RESIDENCE								
2 years or less	8%	14%	6%	10%	7%	17%	19%	na
3 - 9 years	17	18	11	10	16	15	28	na
10 years or longer	59	58	71	66	63	57	52	na

na - not asked

APPENDIX F

INTERPRETATION OF AND UNCERTAINTY IN SURVEY RESULTS

INTERPRETATION OF AND UNCERTAINTY IN SURVEY RESULTS

Survey research provides a summary, simplified view of complex behaviors and attitudes of large groups of people. Uncertainty both in the summary view and in predictions of future behavior based on that view results from several different steps in the research process. In order to aid the interpretation of our results, we list several of the major sources of uncertainty:

- Specification of the research problem. Research is conducted to aid a specific set of decisions. The populations studied and their particular attitudes and behaviors should be the ones most critical to prediction of future behavior given one decision versus another, but may be tangential to prediction of other behaviors. This kind of uncertainty is minimized when the research project is designed in advance with a particular decision in mind as the end goal of the data obtained.

- Design of the questionnaire and wording of individual questions. A respondent answers any given question in the context of all that has preceded it. In addition, the particular wording of a question affects the response, especially so when the respondent has no strong opinion. This uncertainty is minimized through careful design, but in most cases remains the primary source of problems in interpreting the results. It can be further reduced at the report stage through attention to the context of the questions, and through emphasizing only results that form consistent patterns across several questions.

- Generalization from a small sample to a large population. Individuals speak for themselves, yet are taken as representative of many others similar to them. Sampling error results. The mean response rate of a sampled population will, in general, be close to the "true" mean response rate of the whole population, but will rarely equal it exactly. This kind of error can be quantified, and we present the sampling tolerances applicable to this study. But we stress that this is only one source of uncertainty in the results. Regardless of the statistical significance of an isolated finding, it is less meaningful than a pattern of results across several questions, especially when that pattern complements additional information from sources outside the particular research project.