

Study of American Attitudes Toward Ritualization and Memorialization January 2005

Prepared For Funeral and Memorialization Information Council

040-9489



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Background

- FAMIC commissioned the first study of consumers' attitudes toward memorialization and ritualization in September 1990 to:
 - Determine the personal values which drive consumer decision-making behavior,
 - Learn more about attitudes toward cremation and pre-planning, and
 - Study trends toward simplification in funeral and burial services, to assess emerging trends in shopping for funeral and burial services at non-traditional sources, and to track an increase in the preference for cremation.

Background (Continued)

- Tracking waves (1995, 1999 and 2004) have been guided by the following research objectives:
 - to discover differences among various segments of the market to aid in development of targeted communications and marketing,
 - to learn more about attitudes toward pre-planning, cremation, monuments, cemeteries, and other aspects of memorialization, and
 - to analyze changes in attitudes over time.

Methodology

- Telephone interviews were conducted among:
 - adult Americans, 40 years of age and older (this was a change from past waves when the age was 30 years and over)
- Sample was generated to reflect:
 - state by state representation of the nation's population,
 - a mixture of urban, suburban, and rural areas,
 - diverse age and ethnic groups,
 - various religious beliefs, and
 - 40% male and 60% female gender distribution as females are known to be the primary decision-makers regarding remembrance and memorialization.

Methodology (Continued)

- Telephone interviews were conducted as follows:

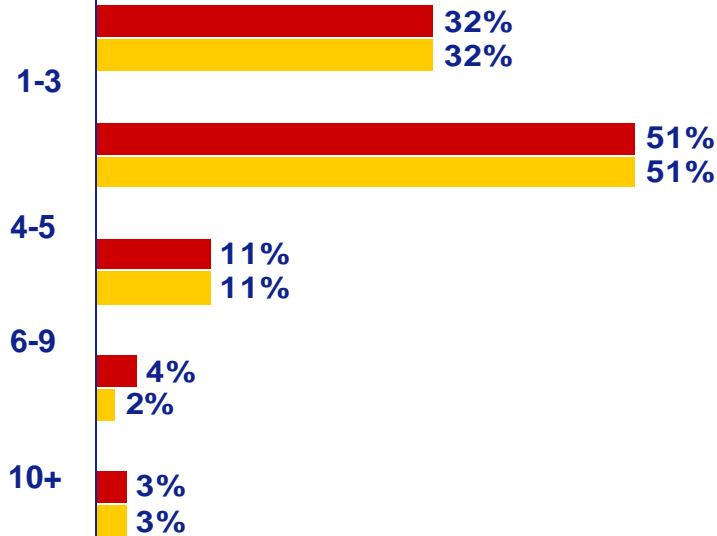
<u>Study</u>	<u>Date</u>	<u>Total Sample Size</u>	<u>Sample Size of Respondents Aged 40+</u>
Benchmark:	September 1990	1,000	635
Wave 1:	September 1995	1,001	584
Wave 2:	September 1999	1,002	615
Wave 3:	November 2004	961	961

- The 2004 sample contains 800 random (general population) respondents, plus 74 African American and 87 Hispanic additional respondents, all 40 years old or more.
- One new objective of the 2004 study is to provide readable measures among the African American and Hispanic audiences. This was accomplished through an over-sample of 74 African American and 87 Hispanic respondents, which produced totals of 120 completed interviews among each of these audiences.
- To accommodate the new age range change we have filtered out all under-40 respondents in the 1990 through 1999 waves of data.

1999: Comparison of Age 30+ vs. Age 40+ Sample

Number of memorial services attended in past 2 years

None



■ Age 30+
■ Age 40+

% Yes ever been involved in arrangements



% Yes made pre-arrangements for self



Q.1d Approximately how many memorial services (with a casket and body present) have you attended in the past two years?

Base: Have attended funeral or memorial service, Age 30+ n=964; Age 40+ n=590

Q.3 Have you personally ever been involved in making funeral or cremation arrangements for either a friend or relative?

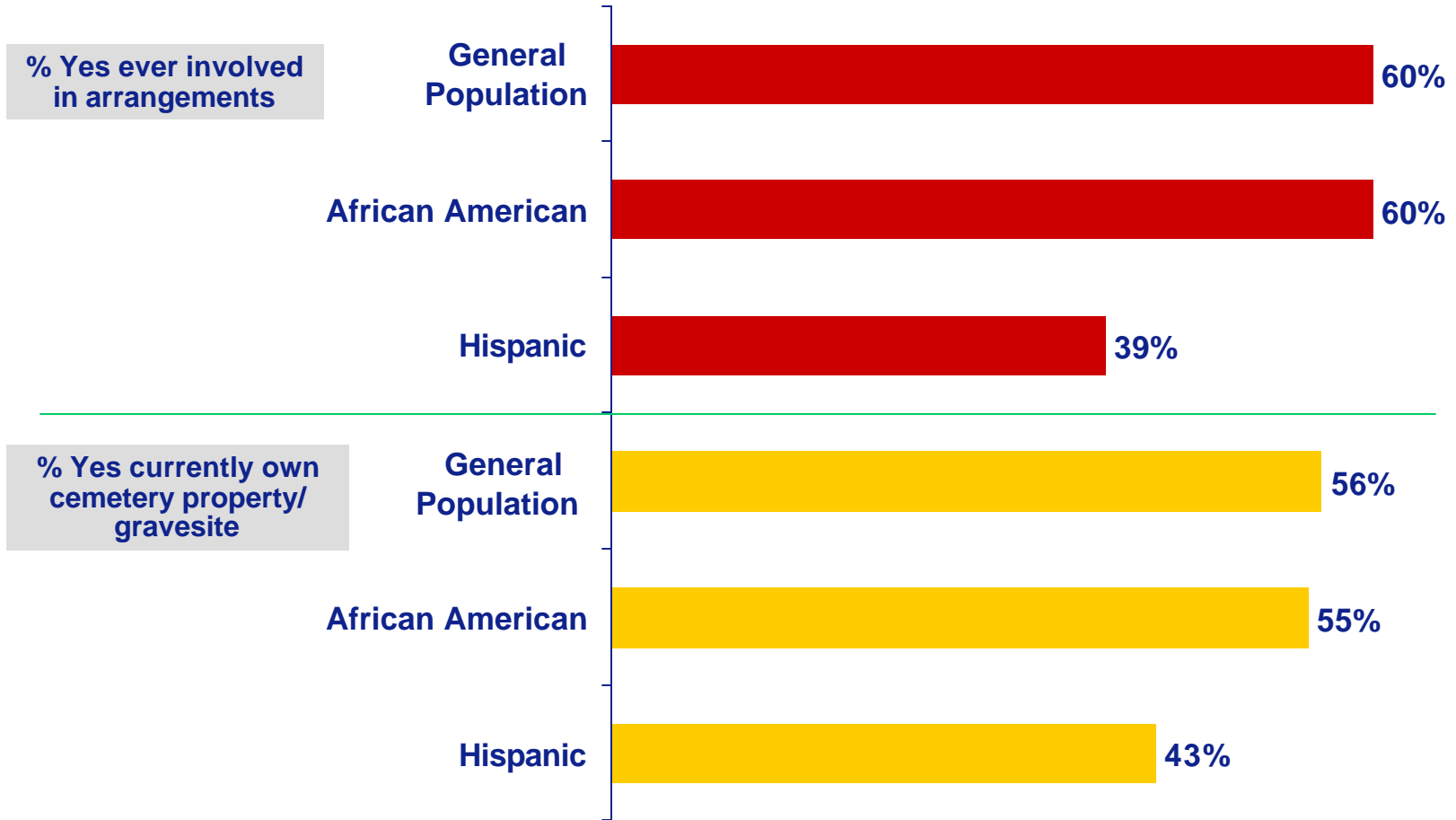
Base: Total Respondents, Age 30+ n=1002; Age 40+ n=615

Q.14b Have you made such pre-arrangements for yourself?

Base: Total Respondents, Age 30+ n=1002; Age 40+ n=615

2004: Random (General Population) Sample vs. Ethnic Sub-Groups

Building Measurable Value



Q.3 Have you personally ever been involved in making funeral or cremation arrangements for either a friend or relative?

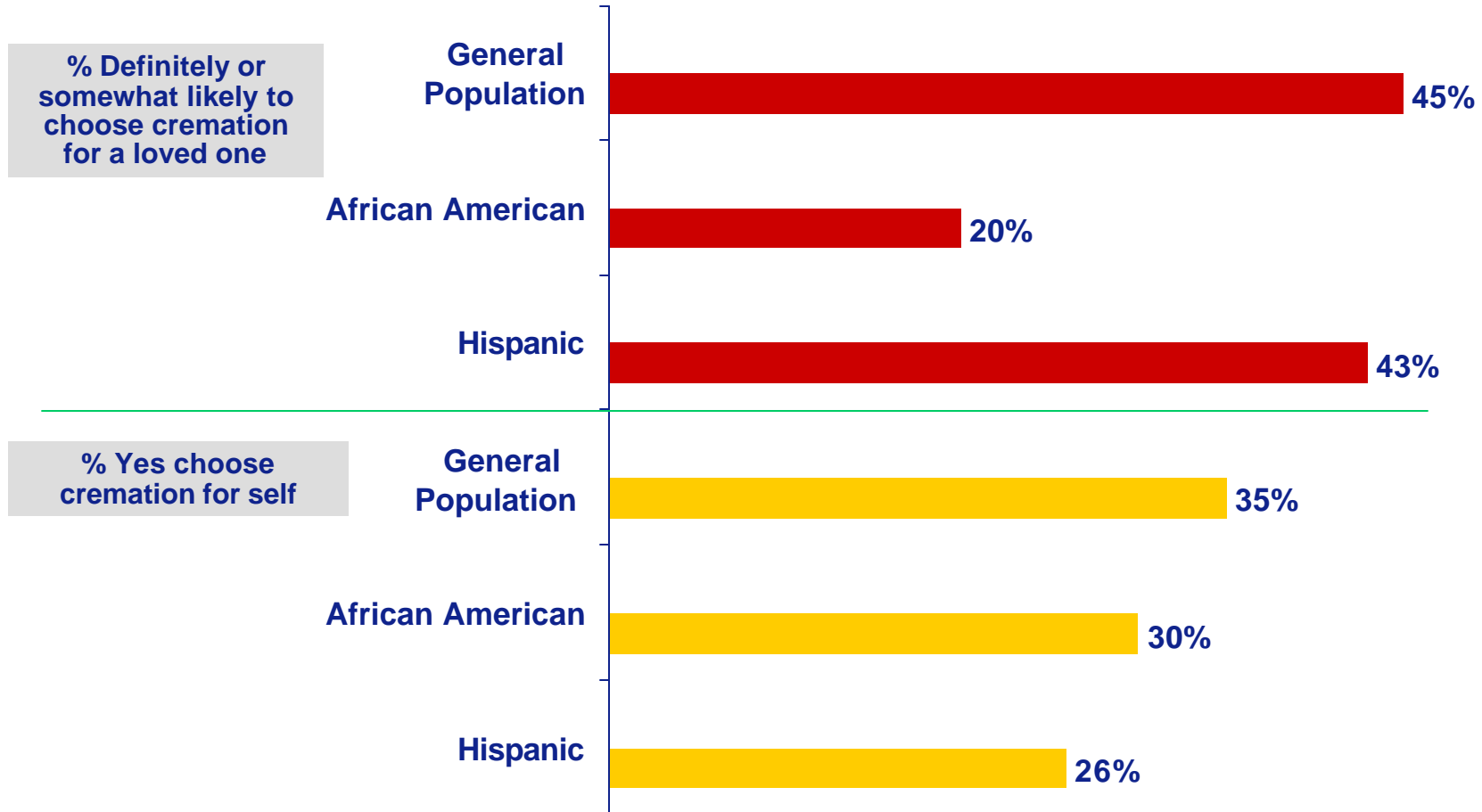
Base: Total Respondents, Random n=800; African American n=120; Hispanic n=120

Q.11c Do you or your family currently own cemetery property or a gravesite?

Base: Total Respondents, Random n=800, African American n=120; Hispanic n=120

2004: Random (General Population) Sample vs. Ethnic Sub-Groups (Continued)

Building Measurable Value



Q.12 How likely would you be to choose cremation for a loved one?

Base: Total Respondents, Random n=800; African American n=120; Hispanic n=120

Q.14b Have you made any such pre-arrangements for yourself?

Base: Total Respondents, Random n=800; African American n=120; Hispanic n=120

A Note on Statistical Testing

- **Statistical testing is used to determine if groups are statistically significantly different from each other. Significance tests determine if the differences between groups are likely to be due to random error or true group differences**
- **The larger the sample size, the smaller the difference required to be significantly different**
- **In this report, the data from various sub-groups have been significance tested at the 95% confidence level. A significant difference is indicated by capital letters (A/B/C...). A capital letter appears next to numbers that are significantly higher than the number in the column identified by that capital letter.**

Executive Summary

Executive Summary

Funeral Attendance Experience

- Nearly everyone (**99%**) in the target audience has attended at least one funeral.
 - African Americans attend more funerals than do other Americans.
 - A greater proportion of these attended by African Americans are held at a place of worship (average of **7.9** funerals at a place of worship in past 2 years as compared to **3.7** funerals for Whites and **3.9** funerals for Hispanics)
- The level of satisfaction with the funeral home experience remains very high (**87%** of Americans wouldn't change anything).
 - Hispanics are most dissatisfied (**16%** of Hispanics as compared to only **11%** of Whites would change something)
 - Those with past arrangement experience (**13%** with vs **8%** without) are more likely to desire changes with personal funeral home experience.

Executive Summary

Funeral Attendance Experience (Continued)

- About **2/3** of Americans would prefer a local, independently owned funeral home, while only **2%** would prefer one owned by a large, national corporation.
 - Hispanics and respondents who are younger or make more money are less likely to have a strong opinion on this subject, with **45%** of Hispanics, **34%** of people aged 40-54, and **45%** of those with an income of over \$125,000 saying funeral home type wouldn't make a difference.
- Consumers are receptive to funeral homes providing services beyond those that have traditionally been offered.
 - Of the three possible services, people exhibit most interest (**46%**) in having their funeral service provider offer a “reception hall or room”.
 - The majority of respondents are not as interested in their provider “catering food or beverages” (**24%**) or “set up hotel accommodations,” (**22%**) although Hispanics and African-Americans do exhibit more interest than Whites.
 - Interest in “Catering food & beverages”: Hispanics-**35%**, African-Americans-**41%**, Whites-**23%**
 - Interest in “Set up hotel accommodations”: Hispanics-**31%**, African-Americans-**36%**, Whites-**20%**

Executive Summary (Continued)

Arrangement Experience

- Most respondents have been personally involved with funeral or cremation arrangements in the past, but the number has declined since 1990 (60% in 2004, 66% in 1990).
- Gender, education, ethnicity and age all impact likelihood of past funeral arrangement experience.
 - Hispanics (39%) participate at a lower rate in the funeral arrangement process than do other sub-groups (White-62%, African-American-60%).
 - Women (63%), people with a college degree (69%), and not surprisingly those aged 75+ (82%) are more likely to be involved in making arrangements.

Executive Summary (Continued)

Arrangement Experience (Continued)

- When people are seeking information on funeral or service arrangements, they use funeral homes and funeral directors (**44%**) more than any other resource.
 - But there is a continuing decline in the reliance on funeral homes and funeral directors (as compared to **49%** in 1999, **59%** in 1995, and **60%** in 1990).
 - In this area of seeking information, the internet remains a tool used by only a small segment of consumers (**4%** in 2004).
 - African Americans (**33%**) rely more heavily on friends and relatives for this information than do other Americans (Whites-**22%**, Hispanics-**20%**)
 - Those who have arranged a funeral or memorial are less likely than those who have not to turn to friends/relatives (Have Arranged-**18%** vs Have not Arranged-**28%**) or others who've gone through the experience (Have Arranged-**6%** vs Have not Arranged-**11%**) for information.
- While those who choose to purchase the monument/gravestone before the death tend to do so more than 1 year before (**78%**), those who wait until after the death tend to do so less than 6 months afterwards (**65%**).

Executive Summary (Continued)

Arrangement Experience (Continued)

Monument builder (**32%**) and funeral home (**24%**) remain the first two preferred gravestone/marker sources.

- While Whites (**33%**) and African-Americans (**30%**) would rather go to a monument builder to purchase a gravestone or marker, Hispanics (**28%**) prefer to go to a funeral home.
- Those who own cemetery property or a gravesite are more likely than those who don't to purchase a gravestone or marker from a monument builder (**37%** vs **27%** respectively) or cemetery (**14%** vs **7%** respectively).
- Those who have arranged a funeral or memorial (**39%**) are more likely than those who haven't (**21%**) to purchase a gravestone or marker from a monument builder.

Executive Summary (Continued)

Funeral Industry Attributes

- Younger Americans are less familiar with the different components of the funeral industry other than the funeral home.
- There has been some erosion, over the past four waves of this study, in the positive perceptions consumers hold about people and businesses in the funeral industry.
 - This trend is important because of the strong role that word-of-mouth communication plays in the funeral arranging process: “friends and relatives” serve as the second most important source of information for consumers who have not had prior experience in arranging a funeral. Only a “funeral home or funeral director” is likely to be used more often.
- This study reaffirms that more experience with funerals results in more positive attitudes toward the industry.
 - Those who have had more experience with the funeral process (who own cemetery property or gravesite, have made pre-arrangements for themselves or were ever involved in making such arrangements) tend to agree more with these statements
 - “Help relieve stress” (14% disagree) and “Received good value for the dollars spent” (20% disagree) are the two attributes that are ranked the lowest by the most people.

Executive Summary (Continued)

Funeral Industry Attributes (Continued)

- Those who have pre-paid for some of their own arrangements are more likely to agree with the following attributes: “Shows concern for the family or survivors,” “Takes special care...wishes of the family,” “Gives me confidence that it’s handled well,” and “Received good value for the dollars spent.”
- Those likely to choose cremation for themselves or others are more likely to agree with “Will not take advantage of the situation” and “Received good value for the dollars spent.”
- Women are more likely than men to strongly agree with “Shows concern for the family or survivors,” “Takes special care to make ceremony and arrangements reflect the wishes of the family,” and “Helps relieve stress.”

Executive Summary (Continued)

Property Ownership

- The level of cemetery property ownership has remained very consistent over time (**56%** in 2004, **55%** in 1999, **57%** in 1995, and **59%** in 1990).
 - Cemetery property ownership is significantly higher for Whites, African Americans, respondents with lower household incomes and older or religious respondents.
 - Whites-**56%**, African-Americans-**55%**, Hispanics-**43%**
 - Less than \$40K-**61%**, \$40K to \$75K-**54%**, \$75K to \$125K-**52%**, More than \$125K-**40%**
 - Aged 40 to 54-**45%**, 55 to 74-**64%**, Older than 75-**77%**
 - Protestant-**67%**, Catholic-**61%**, Baptist-**73%**, No Religion-**50%**
- While the top reason for Americans for not owning cemetery property or a gravesite is “Never thought of purchasing,” (**28%**), the primary reason for African-Americans is “Cannot afford” (**26%**).
 - While **21%** of Whites and **17%** of Hispanics say they don’t own property or a gravesite because they “Plan to be cremated,” only **2%** of African-Americans agree

Executive Summary (Continued)

Opinions Relating to Cremation

- The role of cremation continues to expand. During the past fifteen years we have watched an ever-broader group participate in cremation and regard cremation as a process they would personally select. (46% in 2004, 45% in 1999, 39% in 1995, and 31% in 1990)
 - Two groups that are notable exceptions to this trend are the African American group (20%) and members of the Baptist religion (29%).
 - At least 4 in 10 Hispanics and Whites are likely to choose cremation for themselves or a loved one
 - Those with a lower income or are less educated are also less likely to choose cremation for themselves or a loved one
 - Although the number of people likely to choose cremation for themselves and for others is similar, they express stronger preferences (by selecting “definitely” or “not at all likely” more often) when considering it for themselves
 - Those with previous arrangement experience are less likely to choose cremation for themselves
- Whites (28%) have the most exposure to the process of cremation, while African-Americans (13%) have the least.

Executive Summary (Continued)

Opinions Relating to Cremation (Continued)

- Of those who have helped arrange a cremation in the past, more women are very likely to select cremation again (**63%** women vs **45%** men).
- Top two reasons for choosing cremation remain “Saves money” (**30%**) and “Saves land” (**13%**).
- Respondents are most interested in some type of monument (**28%**) or a living memorial (**19%**) to memorialize cremated remains
 - Those 75+ (**56%**) are most interested in some type of monument to memorialize the cremated remains, while those who make over \$125,000 (**32%**) prefer a living memorial.
- Top two reasons for not choosing cremation for self over the past 14 years are “Do not believe in it” and “Personal preference/don’t like it.”
 - Top reason for Catholics (**26%**) and Hispanics (**31%**) not to choose cremation is “religion does not allow.”
 - More practicing Baptists (**16%**) are more likely to shun cremation because it “destroys the body” than any other religion.

Executive Summary (Continued)

Pre-Arrangement

- Although the number of people who believe it's better to pre-arrange their own service has declined, the proportion of the target audience that is planning to pre-arrange has grown.
 - “Funeral services” remains the first priority (51%).
 - While a strong majority of respondents agree that it is better to pre-arrange for themselves (72% of respondents), most of those (64%) have not taken any specific pre-arrangement steps.
 - Younger respondents are more likely to prefer to pre-arrange their own service.
 - When pre-arranging, women (57%) are more likely than men (41%) to make “funeral services” the first priority, while men (11%) are more likely than women (5%) to prioritize the “monument/gravestone.”
 - Those who are less educated are less likely to prioritize “funeral services” and more likely to prioritize “cemetery property.”
 - Those unlikely to choose cremation for themselves or others, those who've made pre-arrangements for themselves, and those who've pre-paid for some arrangements are more likely to prioritize “cemetery property” and less likely to prioritize “funeral services.”
- Those with higher incomes are least likely to have made pre-arrangements for themselves.

Executive Summary (Continued)

Pre-Arrangement (Continued)

- “Chosen a cemetery plot or grave space,” (33%) “Told another person of your plans,”(32%) and “Selected a monument or gravestone”(24%) are the three most frequently mentioned actions taken by those who’ve already made pre-arrangements for themselves.
 - Women are more likely than men to have selected the gravestone/monument (29% vs 16%) or chosen the casket (10% vs 2%).
 - Those more educated are more likely to have “chosen cemetery plot.”
 - Those less educated are less likely to have “included directions in will or letter” or “chosen an urn.”
- More people in 2004 (63%) have pre-paid for some of their arrangements than in past years (1999-54%, 1995-60%, 1990-57%).
 - Those who are older and those with a smaller household income are more likely to have pre-paid
 - A significantly higher number of those who have pre-paid have paid for “everything” than in 1999 (28% in 2004 as compared to 5% in 1999)

Executive Summary (Continued)

Pre-Arrangement (Continued)

- Of the people likely to pre-arrange details of their funeral, more than 1 in 2 would “tell another person of their plans” (86%), “include specifications in will or letter” (70%), “choose a cemetery” (56%), “select a funeral home” (53%), “set aside money for a funeral” (52%) or “choose a cemetery plot or grave space” (51%).

Detailed Findings

Funeral Attendance/Experience

Funeral or Memorial Service Attendance

- The number of respondents who have ever attended a funeral service is fairly consistent over time.

	2004 %	1999 %	1995 %	1990 %
Yes	99	96	98	100
No	2	4	2	*
Base: Total Respondents	(800)	(615)	(584)	(635)

**Indicates less than .5%*

2004 Q.1a *Have you ever attended a funeral or memorial service?*

1990-1995 Q.1a *Have you ever attended a funeral service?*

Funeral Attendance Past Two Years

	2004** %	1999 %	1995 %	1990 %
One	21 ↑	18	18	13
Two	15	19	17	14
Three	13	14	16	13
Four	7	8	9	11
Five	5	3	6	7
Six	3	2	2	6
Seven	1	1	1	1
Eight	1	1	*	2
Nine	*	--	--	--
Ten+	10	3	2	10
None	24	32	27	18
Base: Have attended funeral or memorial service	(788)	(590)	(571)	(633)

**In a funeral home

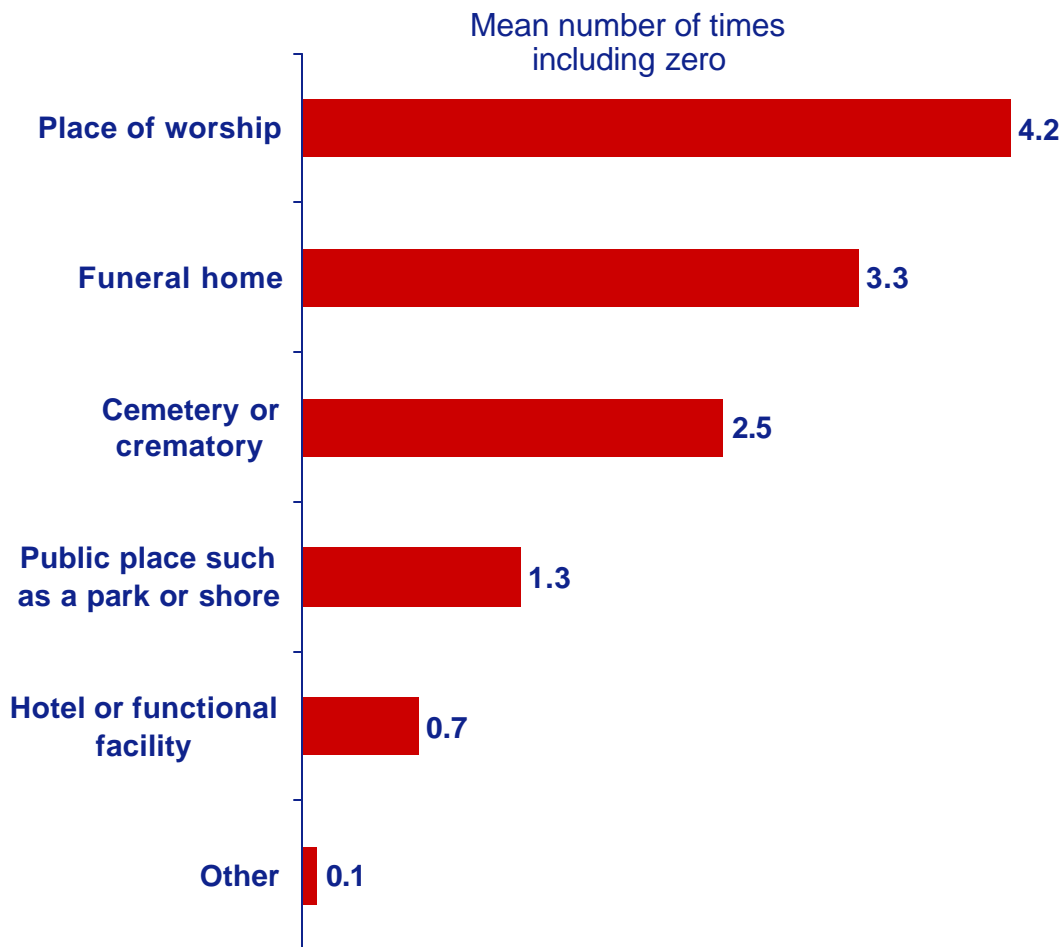
* Less than 1%

Arrows indicate significant shift over time

Q.1b

How many of these have you attended at each of these locations over the past 2 years?

Past Two Years Attendance and Location



NOTE: Multiple mentions (occasions) per respondent were allowed

Base: Have attended funeral or memorial service (n=788)

All four years: Q.1b How many of these have you attended at each of these locations over the past 2 years?

Building Measurable Value

Past Two Years Attendance and Location: 2004

- African Americans attend more funerals at places of worship than Whites or Hispanics.

<i>Mean Number of Times (Including Zero)</i>	<i>Total</i>	<i>Ethnicity</i>		
		<i>White A</i>	<i>African American B</i>	<i>Hispanic C</i>
Place of worship	4.2	3.7	7.9 A	3.9
Funeral home	3.3	3.2	3.4	4.1
Cemetery or crematory	2.5	2.3	2.7	2.7
Public place such as park or shore	1.3	1.2	1.7	1.0
Hotel or functional facility	0.7	0.7	0.9	0.7
Other	0.1	0.1	*	0.3
Base: Have attended funeral or memorial service	(788)	(694)	(117)	(112)

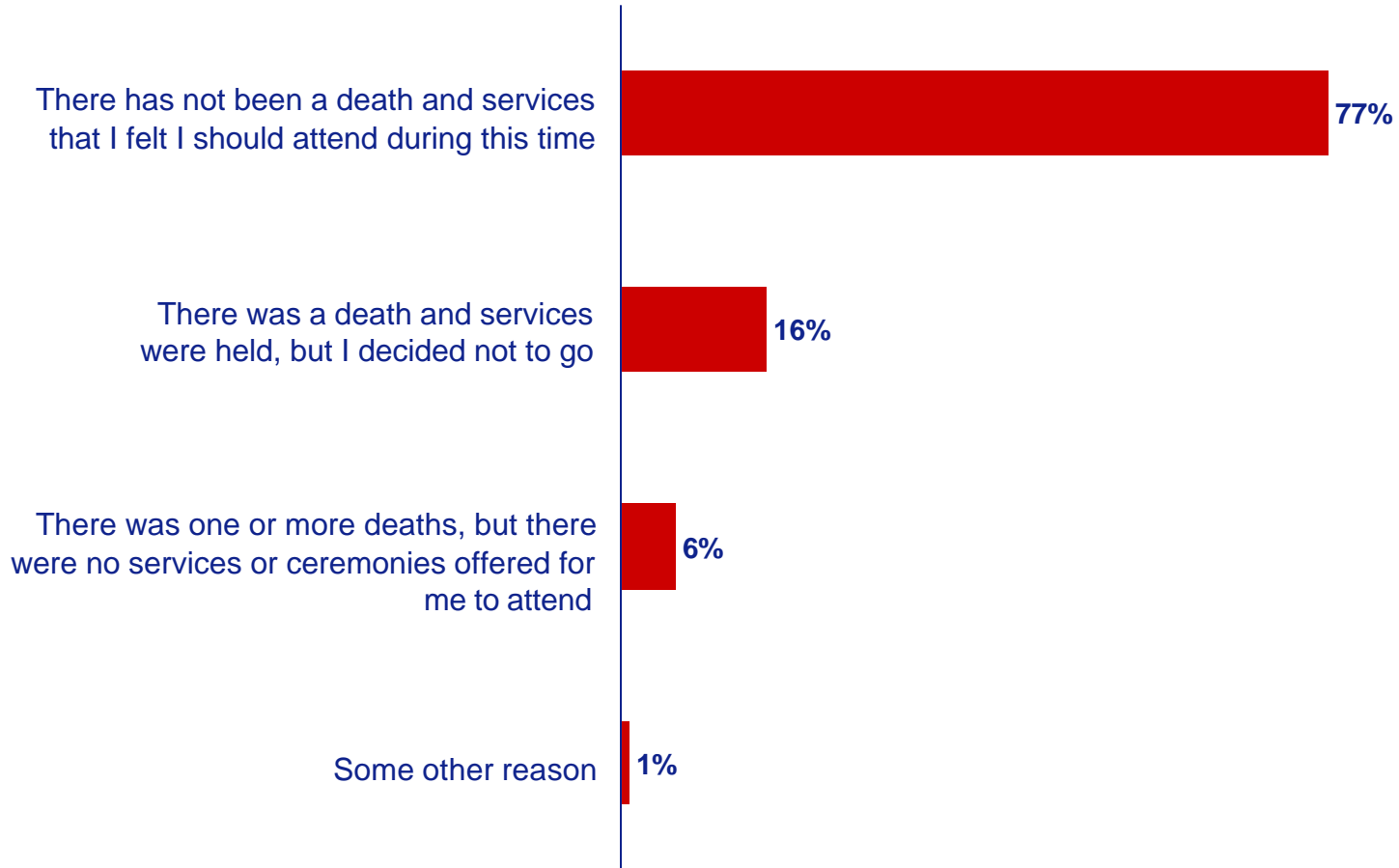
A/B/C=Significant at 95% confidence level

*Indicates less than .5%

Q.1b How many of these have you attended at each of these locations over the past 2 years?

Why Not Attended Funeral or Memorial Services in Past Two Years

Building Measurable Value



Base: Have not attended funeral or memorial services in past 2 years (n=103)

2004: Q.1dd

Which of the following reasons is the one that best describes why you have not attended any funeral or memorial services in the past two years?

Satisfaction with Funeral Home Experience

	2004 %
Anything would change about personal experience	
Yes	11
No	87
Base: Total Respondents	(800)
What would change	
Less expensive	34
Respecting family's wishes	11
More personal services	11
Better organization/attention to detail	8
Shorten process/faster to funeral	6
Not being rushed	6
More compassion	5
Not being pressured into spending more	5
Dislike viewings	3
Cremation instead of funeral	3
Being able to shop around	3
Less gloomy/More lively service	3
Eliminate funerals	3
Base: Would change personal experience with funeral homes	(87)

- The majority of all respondents (87%) indicated that they wouldn't change anything about their personal experience.
- 3% of total respondents, or about 1/3 of the 87 people who would change something about their experience, indicated that cost was their primary concern.

*All four years Q.11a
All four years Q.11b*

*Is there anything that you would change about your personal experience with funeral homes?
What would you change?*

Satisfaction with Funeral Home Experience: 2004

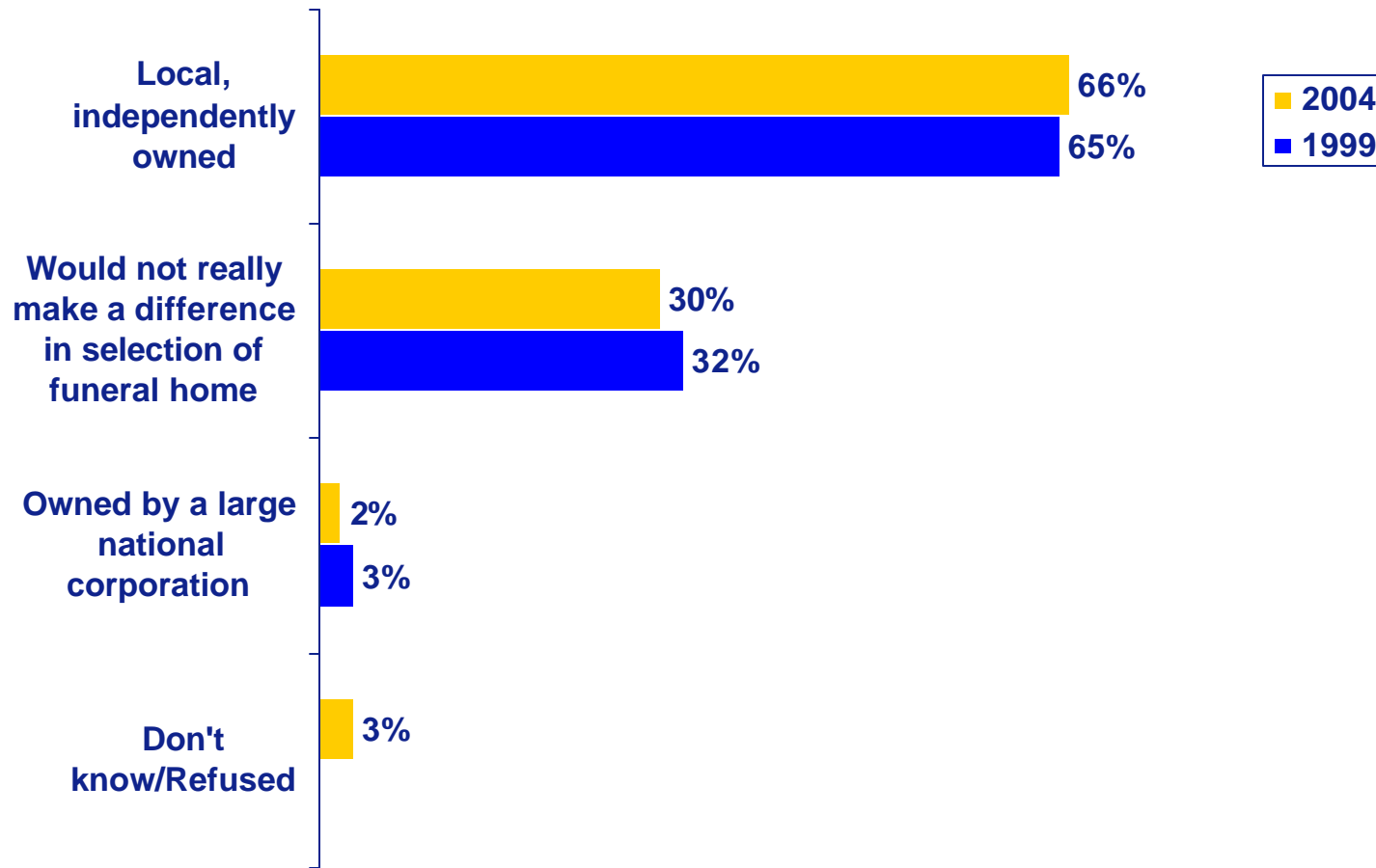
	<i>Total %</i>	<i>Ever Involved in Arrangements</i>		<i>Ethnicity</i>		
		<i>Yes % A</i>	<i>No % B</i>	<i>White % C</i>	<i>African American % D</i>	<i>Hispanic % E</i>
Anything would change about personal experience						
Yes	11	13 B	8	11	15	16
No	87	85	89	87 E	83	76
Base: Total Respondents	(800)	(481)	(318)	(704)	(120)	(120)

A/B/C=Significant at 95% confidence level

*Indicates less than .5%

Q.11a *Is there anything that you would change about your personal experience with funeral homes?*

Preference of Funeral Home Type



Base: Total Respondents (n=800)
2004

1999 Q.21b In selecting a funeral home for yourself or for someone else, would you prefer a funeral home that was (Read list)?

Building Measurable Value

Preference of Funeral Home Type: 2004

Building Measurable Value

	Total %	Ethnicity			Age			Income			
		White % A	African American % B	Hispanic % C	40-54 % D	55-74 % E	75+ % F	Less than \$40,000 % G	\$40,000- \$75,000 % H	\$75,000- \$125,000 % I	\$125,000+ % J
Local, independently owned	66	67 C	63 C	46	62	69 D	76 D	69 J	69 J	65	51
Owned by a large national corporation	2	1	2	4	2	1	--	*	1	2	2
Would not really make a difference in selection of funeral home	30	29	32	45 AB	34 EF	27	17	28	29	31	45 GH
Base: Total Respondents	(800)	(704)	(120)	(120)	(417)	(295)	(88)	(244)	(202)	(127)	(47)

A/B/C=Significant at 95% confidence level

*Indicates less than .5%

Q.21b In selecting a funeral home for yourself or for someone else, would you prefer a funeral home that was (Read list)?

Preference of Funeral Home Type: 2004

	Total %	Own Property or Gravesite		Cremation (Loved One)		Cremation (Self)		Ever Involved in Arrangements	
		Yes % A	No % B	Likely % C	Not Likely % D	Likely % E	Unlikely % F	Yes % H	No % I
Local, independently owned	66	71 B	59	60	73 C	60	74 E	68	63
Owned by a large national corporation	2	1	2	2	1	2	1	1	2
Would not really make a difference in selection of funeral home	30	25	35 A	36 D	24	36 F	23	27	33
Base: Total Respondents	(800)	(445)	(341)	(362)	(377)	(371)	(379)	(481)	(318)

Q.21b In selecting a funeral home for yourself or for someone else, would you prefer a funeral home that was (Read list)?

Services Would Like to See Offered: 2004

	Total %	Ethnicity			Gender		Age			Ever Involved in Arrangements	
		White % A	African American % B	Hispanic % C	Male % D	Female % E	40-54 % F	55-74 % G	75+ % H	Yes % I	No % J
Catering food or beverages											
Definitely interested	10	10	16 A	17 A	12	9	12	9	7	10	10
Probably interested	14	13	25 A	18	13	14	15	13	10	12	16
Not much interest	76	77 BC	59	65	75	77	73	78	83	78	73
Reception hall or room											
Definitely interested	26	26	27	33	32 E	23	28	26	20	27	25
Probably interested	20	21	23	22	22	19	23 H	19 H	10	17	25 I
Not much interest	53	53	50	46	46	58 D	49	55	69 FG	55	50
Set up hotel accommodations											
Definitely interested	9	8	17 A	12	10	8	11 H	7	3	8	9
Probably interested	13	12	19 A	19 A	14	12	18 G	6	9	11	15
Not much interest	79	80 BC	64	69	76	81	72	86 F	88 F	81	76
Base: Total Respondents	(800)	(704)	(120)	(120)	(319)	(481)	(417)	(295)	(88)	(481)	(318)

Building Measurable Value

Q.21c Which of the following services would you like to see your funeral service provider offer? Would you say you would definitely be interested, probably be interested, or not have much interest in that service? (Read List)

Places Visited for Funeral Information

- The percentage of consumers using the Internet for funeral-related information is remarkably low.

	2004 %	1999 %
Personally visited store not located in funeral home where caskets /other funeral related products were sold		
Yes	20	16
No	80	84
Ever visited web-site on the Internet for buying caskets/other related funeral products		
Yes	3	1
No	97	99
Ever visited web-site on the Internet to locate a funeral home		
Yes	3	1
No	97	99
Base: Total Respondents	(800)	(615)

NOTE: 67% of the US population has used the Internet and over 1 in 3 US Internet users have used a search engine (39%) according to Nielsen NetRatings. According to a Spring 2004 MRI CyberStats Study, 46% of those aged 35-54 and 17.2% of those aged 55+ have used the Internet in the past 30 days.

2004 Q.20a Have you, personally, ever visited a store not located in a funeral home, where caskets or other funeral related products were sold?

2004 Q.20b Have you ever visited a web-site on the Internet for buying caskets or other related funeral products?

2004 Q.20c And, have you ever visited a web-site on the Internet to locate a funeral home?

Places Visited for Funeral Information (Continued)

	2004 %	1999 %
Ever visited web-site on the Internet to locate a crematory/cremation provider		
Yes	1	*
No	98	100
Ever visited web-site on the Internet to locate a cemetery		
Yes	3	NA
No	96	NA
Base: Total Respondents	(800)	(615)

NOTE: The percentage of people visiting website for funeral-related information is remarkably low. 67% of the US population has used the Internet and over 1 in 3 US Internet users have used a search engine (39%) according to Nielsen NetRatings. According to a Spring 2004 MRI CyberStats Study, 46% of those aged 35-54 and 17.2% of those aged 55+ have used the Internet in the past 30 days.

*Indicates less than .5%

2004 Q.20d Have you ever visited a web-site on the Internet to locate a crematory or cremation provider?

2004 Q.20e Have you ever visited a web-site on the Internet to locate a cemetery?

Arrangement Experience

Preferred Source of Funeral Arrangement Information

Building Measurable Value

	2004 %	2004 %	1999 %	1995 %	1990 %
Funeral home/director	45	44 ↓	49	59	60
Friends/relatives	22	28 ↑	21	20	17
Own experience	12	3	1	--	1
Church/church leaders	10	10	7	6	NA
Others who have gone through the experience	8	11	2	3	3
Advertisement/phone book	8	6	9	*	NA
Depends on wishes of the deceased	8	7	1	NA	NA
Internet	4	6	2	NA	NA
Library/book/magazine	2	4	*	*	1
No one to turn to	*	--	*	2	*
Other	1	1	9	3	8
Don't know/Refused	5	3	7	11	15
Base:	(800)	(318)	(261)	(227)	(218)
	Total Respondents	Not personally involved in making arrangements			

Arrows indicate significant shift over time

*Less than .5%

All four years Q.3e If you needed information on making funeral or service arrangements, where would you look for that information?

Preferred Source of Funeral Arrangement Information: 2004

- African Americans are more likely to turn to friends/relatives for advice and information than Whites or Hispanics.

	Total %	Ethnicity			Gender		Have Arranged Funeral/Memorial	
		White %	African American %	Hispanic %	Male %	Female %	Yes %	No %
		A	B	C	D	E	F	G
Funeral home/director	45	45	41	41	43	46	46	44
Friends/relatives	22	22	33 AC	20	22	22	18	28 F
Own experience	12	12	8	8	12	12	18 G	3
Church/church leaders	10	11	11	10	11	10	11	10
Others who have gone through the experience	8	8	11	5	8	8	6	11 F
Advertisement/Phone book	8	7	3	14 AB	10 E	6	8	6
Internet	4	4	2	4	5	3	3	6 F
Base: Total Respondents	(800)	(704)	(120)	(120)	(319)	(481)	(481)	(318)

A/B/C=Significant at 95% confidence level

*Indicates less than .5%

Q.3e If you needed information on making funeral or service arrangements, where would you look for that information?

Involvement in Making Arrangements

- The majority of respondents have been personally involved with funeral or cremation arrangements at some point in the past. However, this number has declined from 1990.

	2004 %	1999 %	1995 %	1990 %
Personally involved in selecting provider for most recent funeral/cremation				
Yes	60↓	58↓	61	66
No	40↑	42↑	39	34
Base: Total Respondents	(800)	(615)	(584)	(635)
	(funeral or cremation)	(funeral or cremation)	(funeral arrangements)	(making arrangements)

Arrows indicate significant shift over time

2004 and

1999 Q.3

1995 Q.3

1990 Q.3

Have you personally ever been involved in making funeral or cremation arrangements for either a friend or relative?

Have you personally ever been involved in making funeral arrangements for either a friend or relative?

Have you personally ever been involved in making arrangements for either a friend or relative?

Involvement in Making Arrangements: 2004

Building Measurable Value

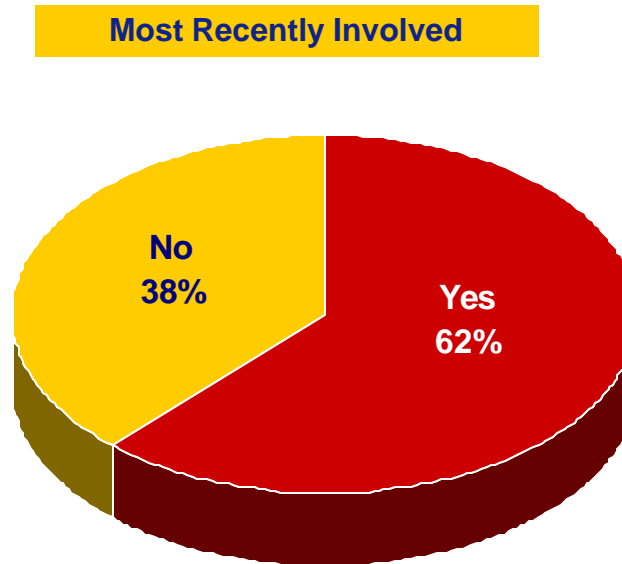
	Total %	Ethnicity			Gender		Age		
		White % A	African American % B	Hispanic % C	Male % D	Female % E	40-54 % F	55-74 % G	75+ % H
		Yes	60	62 C	60 C	39	55	63 D	49
No	40	38	40	61 AB	45 E	37	51 GH	30 H	17
Base: Total Respondents	(800)	(704)	(120)	(120)	(319)	(481)	(417)	(295)	(88)

	Total %	Income				Education		
		Less than \$40,000 % I	\$40,000 – \$75,000 % J	\$75,000 – \$125,000 % K	\$125,000+ % L	High school or less % M	Some college/College Grad % N	Grad School + % O
		Yes	60	57	61 L	62 L	45	56
No	40	43	39	38	55 JK	44 O	40	31
Base: Total Respondents	(800)	(224)	(202)	(127)	(47)	(297)	(361)	(128)

Q.3 Have you personally ever been involved in making funeral or cremation arrangements for either a friend or relative?

Personally Involved in Provider Selection

- Among those involved with previous arrangements, over half were personally involved in selecting a provider.



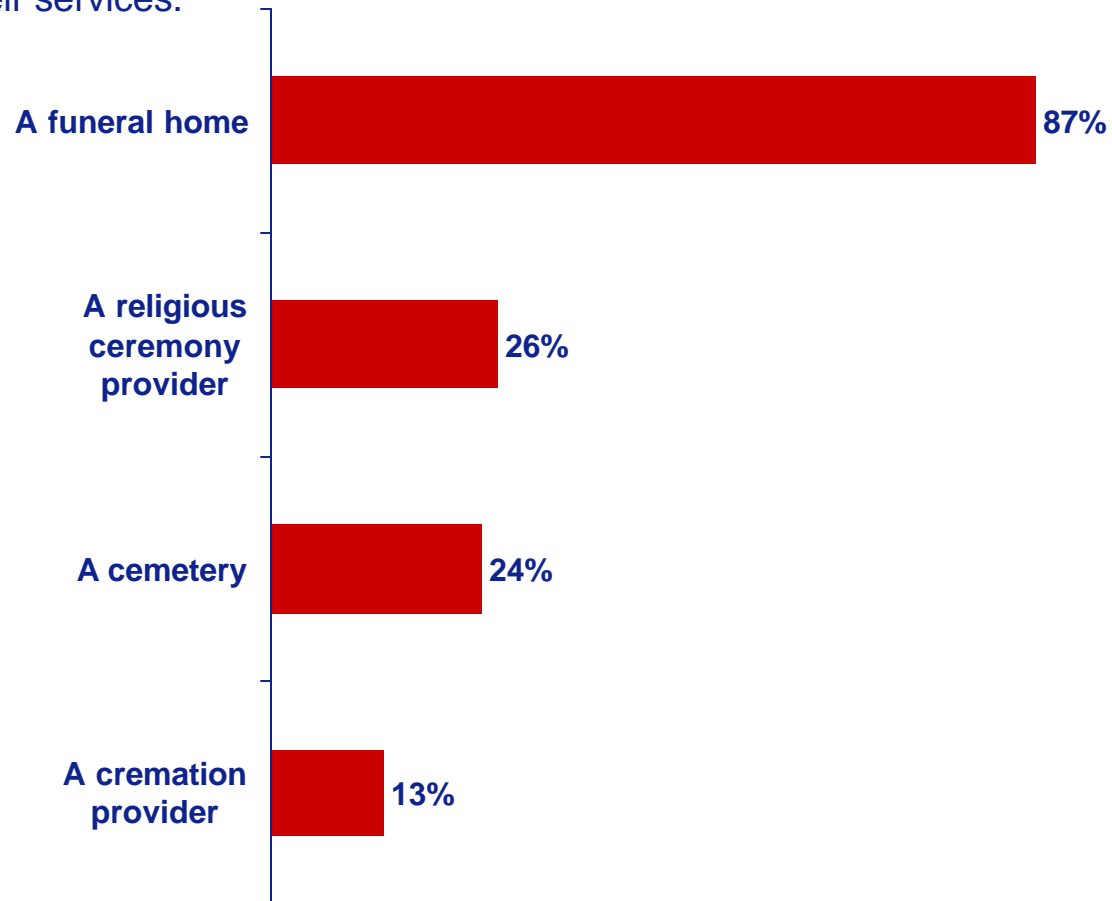
Base: Was involved with making past arrangements (n=481)

2004 Q.3a

Please think about the most recent funeral or cremation you were involved with. Were you personally involved in selecting a provider for those arrangements?

Provider Used on Most Recent Occasion

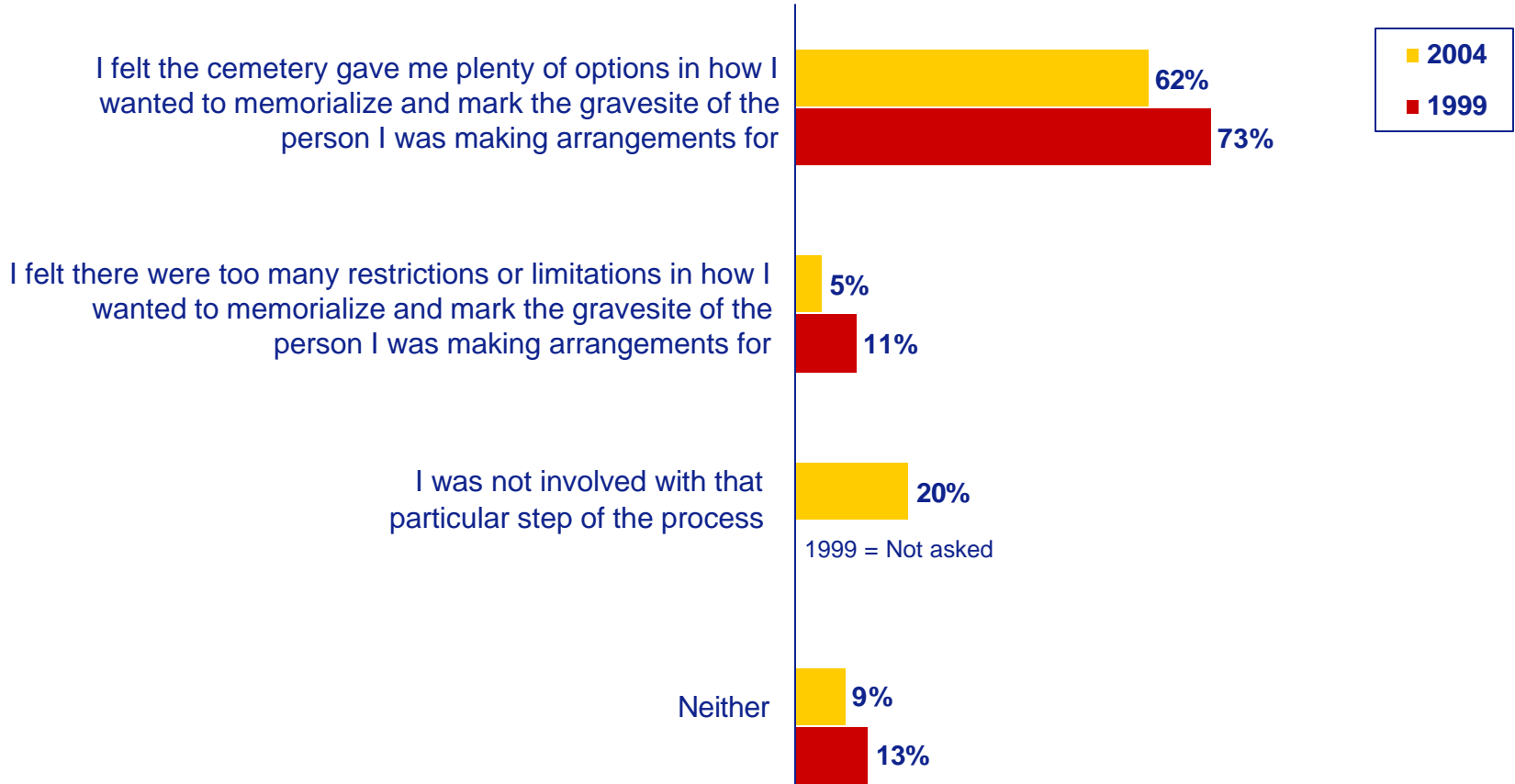
- A funeral home was by far the most common provider selected, with nearly 9 out of 10 using their services.



Base: Was personally involved in making recent arrangements (n=300)
2004 Q.3aa Which of the following providers did you use?

Cemetery Arrangements

- Most respondents were satisfied with the range of options given by the cemetery.



NOTE: The inclusion of the additional response "I was not involved with that particular step of the process" in 2004 can account for some of the decline in the other answer selections.

2004 Base: Was personally involved in making recent arrangements (n=300)

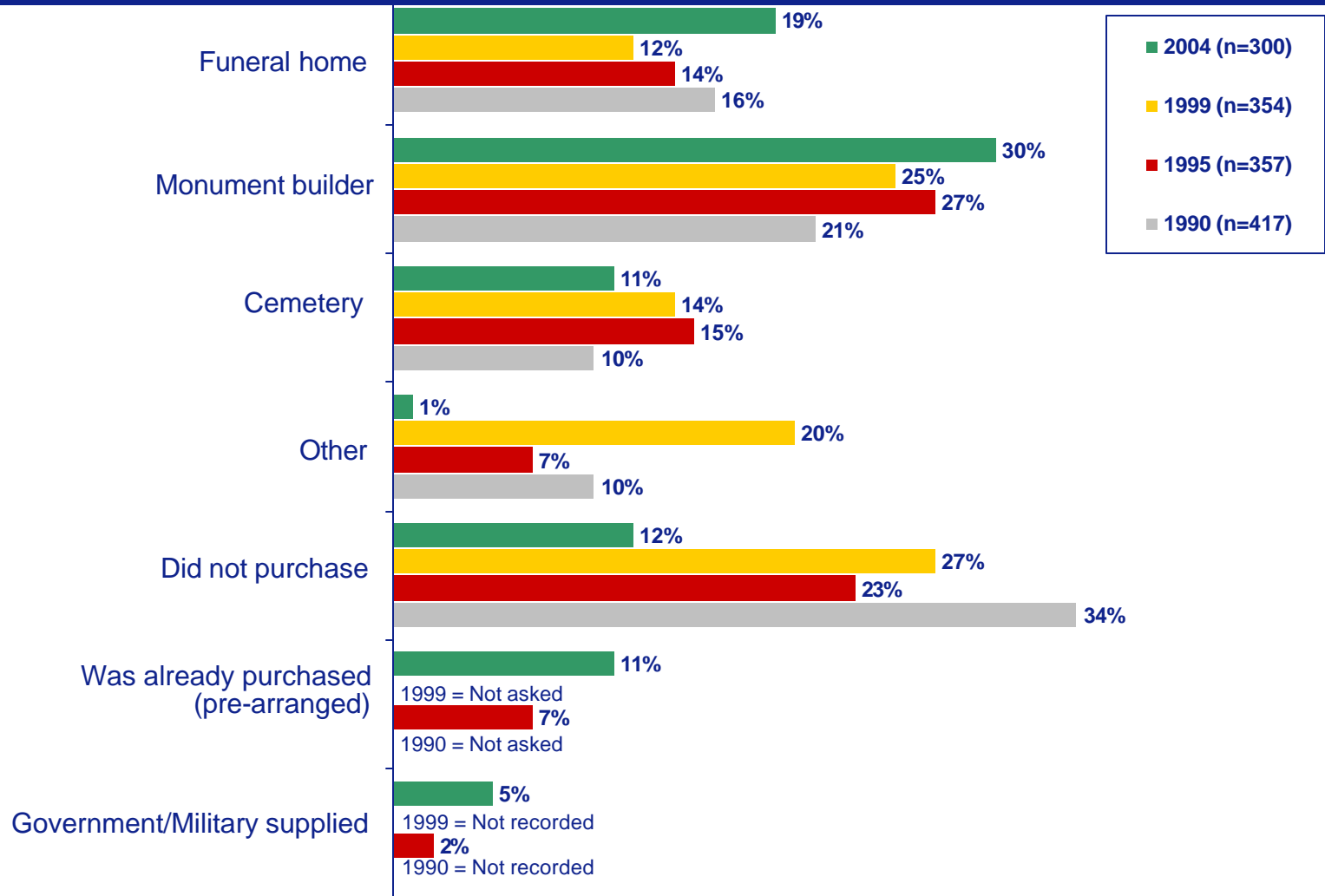
1999 Base: Ever involved in funeral/cremation arrangements (n=354)

2004 and

1999 Q.3bb Which of the following statements best describes how you felt about the arrangements you made at the cemetery?

Where Purchased Gravestone or Marker

Building Measurable Value



NOTE: In the 2004 wave, we instructed the interviewers to probe and clarify if a respondent's initial answer was "other".
 Base: Was personally involved in making recent arrangements (1999, 1995, 1990). Personally involved in selecting provider for recent arrangements (2004)
 All four years: Q.3c When you last made these arrangements, where did you go to purchase the gravestone or marker?

Why Used That Source for Gravestone/Marker

Building Measurable Value

	2004 %
We know them/Used them before/Old family friends	16
Location	15
It's their business/Expertise	15
The cost/Gives a good deal	11
They give you more options/choices/selection	6
Better qualified in their job/know what they're doing	4
Reputation	4
Quality of monument	4
Better service/compassionate	3
Ensure that monument has correct information/name/date	3
You get what you want/see what you're getting	2
Cuts out the middle man	2
They would pay special attention to it/special care	2
Funeral director/cemetery did not handle monuments	2
Better information	1
Don't know	12
Base: Purchased gravestone/marker	(232)

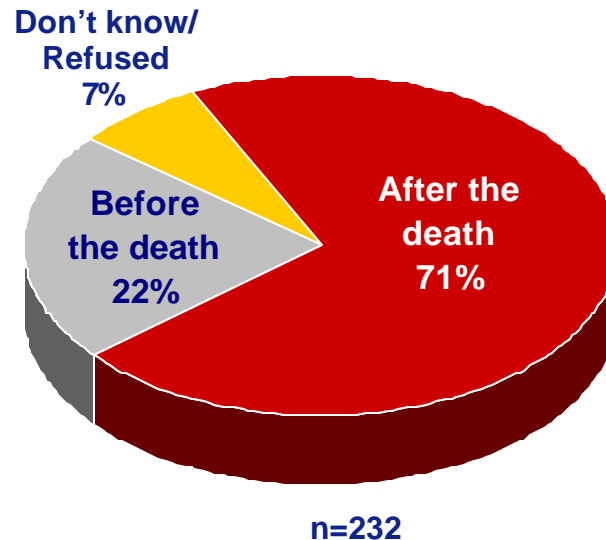
- Trust (based on past experience or presumed expertise) and location are the primary reasons for purchasing the gravestone or marker from a specific vendor.
 - “We know them/used them before/Old family friends”, “It’s their business/Expertise”, “Better qualified in their job/know what they’re doing”, and “Reputation”, all factors of Trust, was selected by 39% of respondents who’d purchased a gravestone or marker
- Cost is also an important factor.

2004 Q.3cb Why did you buy it from there?

When Gravestone/Marker Purchased

- While those who choose to purchase the monument/gravestone before the death tend to do so more than 1 year before (78%), those who wait until after the death tend to do so less than 6 months afterwards (61%).

<i>Length of time gravestone/marker made before the death</i>	<i>%</i>
More than 10 years before	50
5 to 10 years before	15
1 to 5 years before	13
6 months to 1 year before	4
1 to 6 months before	6
1 week to 1 month before	4
Don't know/Refused	8
Base: Purchased gravestone or marker	(52)



<i>Length of time gravestone/marker made after the death</i>	<i>%</i>
More than 10 years after	2
5 to 10 years after	1
1 to 5 years after	9
6 months to 1 year after	8
1 to 6 months after	37
1 week to 1 month after	24
Don't know/Refused	4
Base: Purchased gravestone or marker	(164)

Future Purchase Location for Gravestone/Marker

- Over time an increasing number of first-time arrangers are looking to their selected funeral home as the source for purchasing a gravestone or marker.

	2004 %	2004 %	1999 %	1995 %	1990 %
Monument builder	32	21	24	31	22
Funeral home	24	26 ↑	20	20	15
Cemetery	11	11	11	13	11
Friends/relatives	8	13	11	1	NA
Wouldn't purchase	6	5	5	3	NA
Advertising (2004/includes phone books)	5	7	9	1	NA
Internet	2	3	3	NA	NA
Other	1	1 ↓	7	9	17
Don't know/Refused	12	14	9	22	35
Base:	(800)	(318)	(261)	(227)	(218)
	Total Respondents		Not personally involved in making arrangements		

Arrows indicate significant shift over time

All four years Q.3f In the future, if you were to purchase a gravestone or marker, where would you go?

Future Purchase Location for Gravestone/Marker: 2004

	Total %	Ethnicity			Age		
		White %	African American %	Hispanic %	40-54 %	55-74 %	75+ %
		A	B	C	D	E	F
Monument builder	32	33 C	30 C	14	30	34	35
Funeral home	24	22	29	28	27 F	22	15
Cemetery	11	11	12	12	9	14 D	11
Friends/relatives	8	8	4	9	10 E	5	7
Wouldn't purchase	6	6 B	2	3	4	7 D	8
Advertising (including phone books)	5	5	7	8	7 F	4 F	--
Base: Total Respondents	(800)	(704)	(120)	(120)	(417)	(295)	(88)

A/B/C=Significant at 95% confidence level

*Indicates less than .5%

Q.3f In the future, if you were to purchase a gravestone or marker, where would you go?

Future Purchase Location for Gravestone/Marker: 2004

	<i>Total %</i>	<i>Own Property or Gravesite</i>		<i>Have Arranged Funeral/Memorial</i>	
		<i>Yes % A</i>	<i>No % B</i>	<i>Yes % C</i>	<i>No % D</i>
Monument builder	32	37 B	27	39 D	21
Funeral home	24	23	24	22	26
Cemetery	11	14 B	7	11	11
Friends/relatives	8	7	9	5	13 C
Wouldn't purchase	6	4	8 A	6	5
Advertising (including phone books)	5	3	8 A	4	7
Base: Total Respondents	(800)	(445)	(341)	(481)	(318)

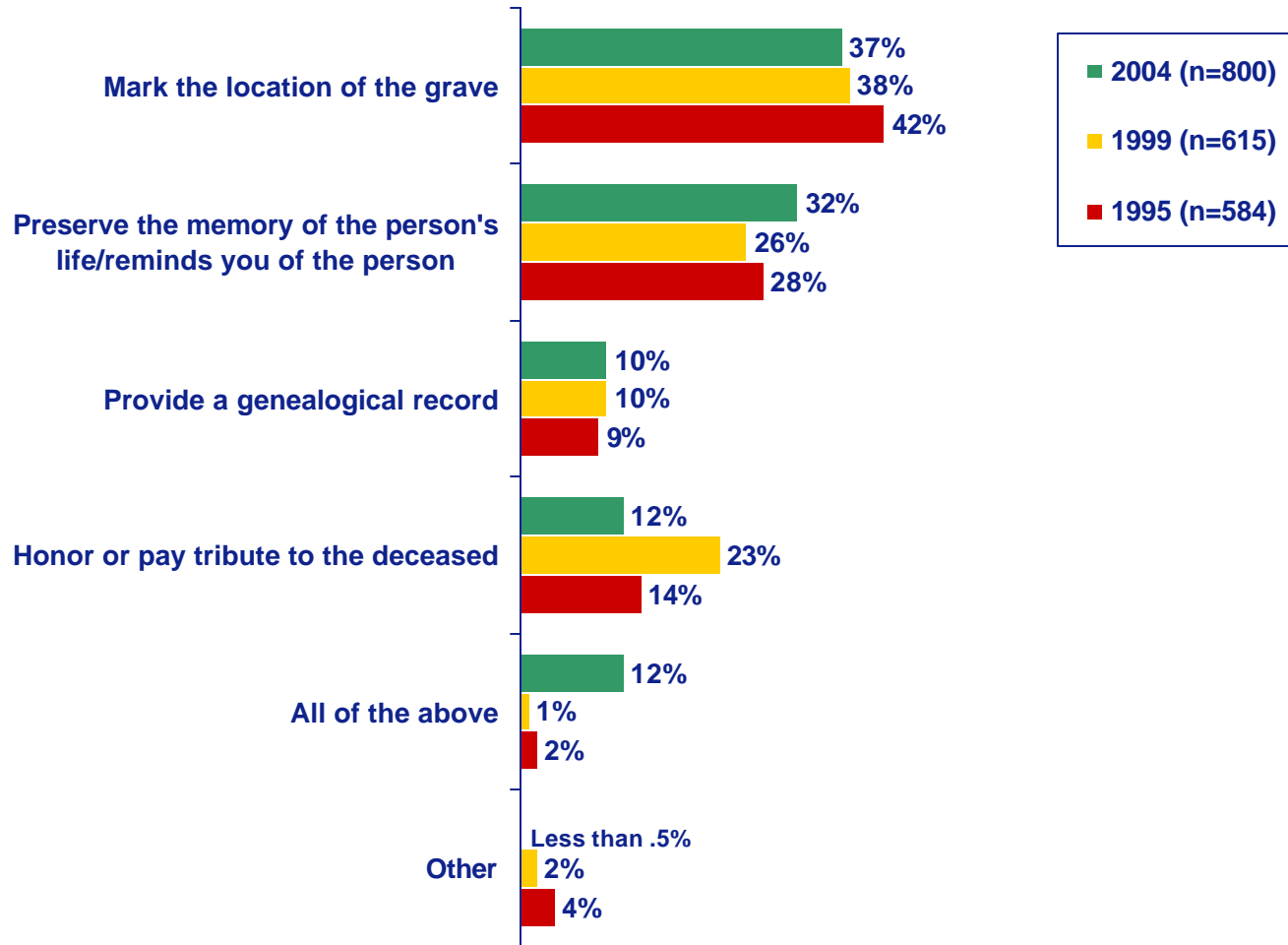
A/B/C=Significant at 95% confidence level

*Indicates less than .5%

Q.3f In the future, if you were to purchase a gravestone or marker, where would you go?

Most Important Function of Monument or Gravestone

Building Measurable Value



Base: Total Respondents

**NOTE: In 2004 changed to 'do not read list' to conserve survey length*

2004, 1999, & 1995 Q.11f Now I'd like you to think about the monument or gravestone placed at the cemetery. what do you think is the most important function of a monument or gravestone?

Funeral Industry Attributes

Funeral Industry Attributes – People/Businesses

- Perceptions toward the industry are generally positive, but there are visible declines from 1990.

	2004 %	1999 %	1995 %	1990 %
Show concern for the family or survivors				
Total Agree (Top 2 Box)	91	92	92	92
Strongly agree	58 ↓	61	60 ↓	66
Somewhat agree	33 ↑	31	32	26
Take special care to make ceremony and arrangements reflect the wishes of the family				
Total Agree (Top 2 Box)	90 ↓	94	96	93
Strongly agree	57 ↓	68	72	72
Somewhat agree	33 ↑	26	24	21
Give me confidence that its handled well				
Total Agree (Top 2 Box)	90	91	91	90
Strongly agree	53 ↓	53 ↓	59	63
Somewhat agree	37 ↑	38 ↑	32	27
People in the industry are professional and competent				
Total Agree (Top 2 Box)	86	86	91	86
Strongly agree	52 ↓	51	59	58
Somewhat agree	34 ↑	35	32	28
Base: Total Respondents	(800)	(615)	(584)	(635)

Arrows indicate significant shift over time

All four years Q.7 I am going to read you a list of attributes which may or may not describe people or businesses in this profession. For each description I read, I'd like you to tell me if you agree or disagree with the description.

Funeral Industry Attributes – People/Businesses (Continued)

	2004 %	1999 %	1995 %	1990 %
Will not take advantage of the situation				
<u>Total Agree (Top 2 Box)</u>	65	69	64	64
Strongly agree	34	38	34	38
Somewhat agree	31	31	30	26
Help relieve stress				
<u>Total Agree (Top 2 Box)</u>	75	79	77	77
Strongly agree	34 ↓	40	38	43
Somewhat agree	41 ↑	39	39	34
Received good value for the dollars spent				
<u>Total Agree (Top 2 Box)</u>	62	NA	NA	NA
Strongly agree	32	NA	NA	NA
Somewhat agree	30	NA	NA	NA
Base: Total Respondents	(800)	(615)	(584)	(635)

Arrows indicate significant shift over time

All four years Q.7

I am going to read you a list of attributes which may or may not describe people or businesses in this profession. For each description I read, I'd like you to tell me if you agree or disagree with the description.

Funeral Industry Attributes – People/Businesses: 2004

Building Measurable Value

	Total %	Gender		Own Property or Gravesite		Cremation (Loved One)		Cremation (Self)	
		Male % A	Female % B	Yes % C	No % D	Likely % E	Not Likely % F	Likely % G	Not Likely % H
Show concern for the family or survivors									
Total Agree (Top 2 Box)	91	89	92	93 D	88	91	92	90	93
Strongly agree	58	51	62 A	61 D	52	56	58	56	59
Somewhat agree	33	38 B	30	32	35	36	33	35	34
Take special care to make ceremony and arrangements reflect the wishes of the family									
Total Agree (Top 2 Box)	90	90	90	93 D	87	89	92	89	93 G
Strongly agree	57	49	63 A	60 D	53	55	60	55	61
Somewhat agree	33	42 A	27	33	34	34	32	33	32
Give me confidence that it's handled well									
Total Agree (Top 2 Box)	90	89	90	92 D	86	89	92	88	92
Strongly agree	53	49	55	56 D	48	50	56	50	56
Somewhat agree	37	40	35	37	38	39	36	39	36
Base: Total Respondents	(800)	(319)	(481)	(445)	(341)	(362)	(377)	(371)	(379)

Q.7 I am going to read you a list of attributes which may or may not describe people or businesses in this profession. For each description I read, I'd like you to tell me if you agree or disagree with the description.

Funeral Industry Attributes – People/Businesses: 2004 (Continued)

	Total %	Pre-Arrange Self		Pre-paid for Arrangements		Pre-Arrange Next 5 Years		Ever Involved in Arrangements	
		Yes % A	No % B	Yes % C	No % D	Likely % E	Not Likely % F	Yes % G	No % H
Show concern for the family or survivors									
Total Agree (Top 2 Box)	91	94	90	96 D	88	91	89	94 H	86
Strongly agree	58	60	58	63	54	65 F	53	63 H	50
Somewhat agree	33	34	32	34	35	27	36 E	31	37
Take special care to make ceremony and arrangements reflect the wishes of the family									
Total Agree (Top 2 Box)	90	94	89	96 D	88	91	87	93 H	86
Strongly agree	57	64 B	55	66	58	64 F	46	62	50
Somewhat agree	33	30	34	30	31	27	41 E	31	36
Give me confidence that it's handled well									
Total Agree (Top 2 Box)	90	93	89	96 D	88	92 F	86	94 H	83
Strongly agree	53	55	52	57	51	61 F	43	57 H	46
Somewhat agree	37	38	37	39	37	31	43 E	37	37
Base: Total Respondents	(800)	(222)	(409)	(139)	(78)	(218)	(179)	(481)	(318)

Q.7 I am going to read you a list of attributes which may or may not describe people or businesses in this profession. For each description I read, I'd like you to tell me if you agree or disagree with the description.

Funeral Industry Attributes – People/Businesses: 2004 (Continued)

	Total %	Gender		Own Property or Gravesite		Cremation (Loved One)		Cremation (Self)	
		Male % A	Female % B	Yes % C	No % D	Likely % E	Not Likely % F	Likely % G	Not Likely % H
People in the industry are professional and competent									
Total Agree (Top 2 Box)	86	85	86	88 D	82	86	86	85	88
Strongly agree	52	51	53	55	48	50	54	51	54
Somewhat agree	34	34	33	33	34	36	32	34	34
Help relieve stress									
Total Agree (Top 2 Box)	75	71	77	77	73	74	76	73	77
Strongly agree	34	27	38 A	38 D	28	32	34	32	35
Somewhat agree	41	44	40	39	45	43	42	41	42
Base: Total Respondents	(800)	(319)	(481)	(445)	(341)	(362)	(377)	(371)	(379)

Building Measurable Value

A/B/C=Significant at 95% confidence level

Q.7 I am going to read you a list of attributes which may or may not describe people or businesses in this profession. For each description I read, I'd like you to tell me if you agree or disagree with the description.