



BY AUSTIN WEBER, SENIOR EDITOR

READER SURVEY IDENTIFIES THE BEST INSTRUMENTATION AND CONTROL PRODUCTS

CONTROL'S SIXTH ANNUAL READERS' CHOICE AWARDS

More than 50,000 end users, representing all geographic regions of the U.S. and every process industry segment, were asked to identify the top suppliers in 63 different product categories ranging from ambient analyzers to weight instrumentation.

This year, end users also were asked to rank vendors' customer service on a scale of 0 to 5, where 0=nonexistent and 5=excellent. In some cases, the company that received top vote for its products actually rated lower than its competitors when it comes to service.

For the third consecutive year, Emerson Electric's Fisher-Rosemount group of companies continues its stranglehold as the supplier of choice in the process control industry, garnering pole position in 17 different product categories (compared to only 12 in 1997), ranging from flowmeters to pressure transmitters to temperature instrumentation. Fisher-Rosemount companies cited by end users include Brooks Instrument, Fisher Controls, Fisher-Rosemount Systems, Intellution, Micro Motion, Rosemount Analytical, and Rosemount Measurement.

This year, Emerson's companies picked up first-place votes for stack gas analyzers (Rosemount Analytical) and variable area flowmeters (Brooks Instrument). The company also made significant strides in the competitive software arena, with Fisher-Rosemount Systems and Intellution finishing on top in the batch management software category. Intellution tied for first place (with Wonderware) in the area of supervisory control software.

Rockwell Automation's Allen-Bradley unit also improved its status in the annual

CONTROL rankings, garnering first-place votes in nine different categories (compared to seven last year). Its business units include Allen-Bradley, Reliance Electric, and Rockwell Software. This year, Allen-Bradley was cited for its input/output systems and training, in addition to other product categories where it has been leader of the pack in previous Readers' Choice Awards.

Among significant changes in this year's rankings, Panametrics surpassed Vaisala in the moisture/humidity analyzer category, while Allen-Bradley jumped out in front of Opto 22 in the input/output systems arena. In the infrared temperature instrumentation category, Raytek leapfrogged over Ircon. Another noteworthy change occurred in the area of training: Allen-Bradley tied for first place with long-time leader ISA.

On the service side, Emerson also received top billing from end users responding to the CONTROL survey. Indeed, its business units were cited in 16 different product categories, including some areas where its products were not chosen number one. For instance, in the vortex flowmeter product category, Rosemount Measurement (23%) finished second to Yokogawa Industrial Automation (28%). However, Rosemount Measurement received a 4.4 on the service scale, compared to a 3.6 for Yokogawa.

Not surprisingly, Allen-Bradley also ranked high on customer service, receiving top honors in eight different categories, such as small-scale integrated control systems and safety systems.

All companies that received at least 5% of the vote for number one are listed. In some product categories, such as radar level instrumentation, process control software, recorders, and thermocouples, two or more vendors tied for first-place honors. A representative product from the top vote-getter in each category is pictured.

The 1998 Readers' Choice Award ballots were sent in November via fax broadcast to approximately two-thirds of CONTROL's readers (if you didn't get a ballot, we don't have your fax number). The ballot asked each respondent to identify by name (i.e., fill in the blank) the leading supplier in each of more than 60 product categories. Respondents were cautioned to vote only in those areas in which they had experience.

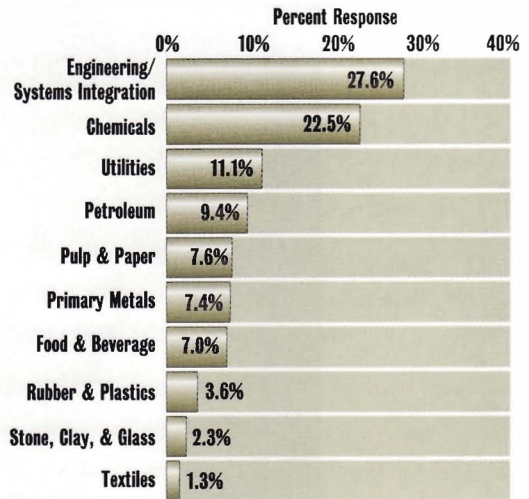
The margin of error of the survey, as indicated through the survey results, is an estimated 3% at a 90% confidence level. Respondents' demographic information is shown in the accompanying figures.

Thanks once again go out to Professor James Talaga, chair of the marketing department at LaSalle University, Philadelphia, and Jim White, White Marketing Inc., Huntingdon Valley, Pa., for their help in devising a CONTROL Readers' Choice Award survey that gives a clear picture of the leaders in the process control marketplace.

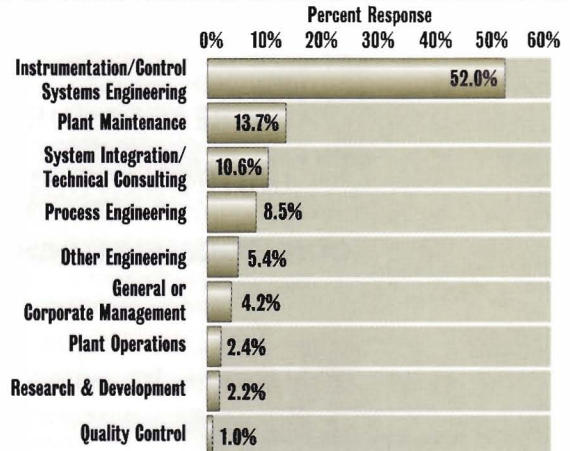
Congratulations to all of the 1998 Readers' Choice Award winners and thanks to all who responded to our survey. Award listings, arranged alphabetically by product category, begin on p38.

SURVEY RESPONDENT DEMOGRAPHICS

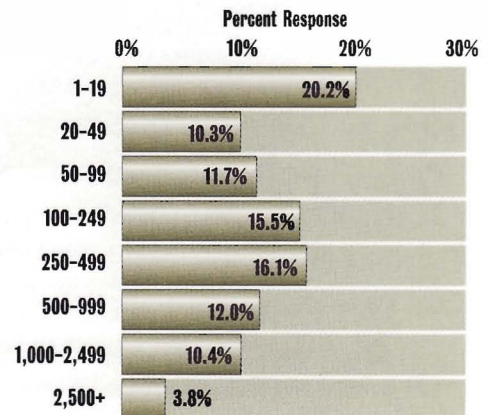
IN WHAT INDUSTRY DO YOU WORK?



WHAT IS YOUR PRIMARY AREA OF RESPONSIBILITY?



WHAT IS THE TOTAL NUMBER OF EMPLOYEES AT YOUR LOCATION?





MSA's Ultima Ambient Air Gas Monitor

ANALYZERS, AMBIENT

1. MSA	32% (3.6)
2.* Sierra Monitor	6% (4.3)
Draeger	5% (4.0)

* Differences of fewer than 3% are of marginal statistical significance.



Micro Motion's Elite

ANALYZERS, DENSITY/CONCENTRATION

1. Micro Motion	21% (4.5)
2. TN Technologies/Kay-Ray/Sensall	13% (3.7)
3. Solartron	9% (3.2)



Rosemount Analytical's Models 3081 & 81

ANALYZERS, PH/ORP/CONDUCTIVITY

1. Rosemount Analytical	28% (4.0)
2.* Great Lakes Instruments	12% (4.0)
Foxboro	10% (3.8)
4. Yokogawa	8% (4.3)
5. Honeywell	5% (3.4)
TBI Bailey	5% (4.1)

* Differences of fewer than 3% are of marginal statistical significance.



Panametrics' Series 1

ANALYZERS, MOISTURE/HUMIDITY

1. Panametrics	19% (3.8)
2. Vaisala	12% (4.1)
3.* Honeywell	7% (4.2)
Rosemount Analytical	7% (3.7)
Endress + Hauser	6% (3.8)
General Eastern	6% (4.0)

* Differences of fewer than 3% are of marginal statistical significance.



Applied Automation's Advance

ANALYZERS, PROCESS CHROMATOGRAPHS

1. Applied Automation/Elsag Bailey	33% (4.1)
2. ABB Process Analytics	12% (3.8)
3. Daniel	5% (3.8)
Foxboro	5% (4.0)

SERVICE TAKES ON NEW IMPORTANCE

In an era when many instrumentation and control products look the same, service is the great differentiator in the minds of many end users and vendors. Today, service after the sale (e.g., training, technical support, etc.) is considered just as important as technology. "Customer service has deteriorated considerably over the past few years," claims a veteran process control engineer at a chemical plant in the Midwest.

At many companies, customer service is changing from a reactive stance to a proactive marketing strategy. Industry observers claim the extent to which an organization is able to effectively manage and deliver customer service will greatly determine its growth, profit, and success in the future. "Just because your current market research indicates that your existing customers are satisfied with your products doesn't mean that you have a competitive edge and can rest on your laurels," warns Barry Maners, president, Matrix Marketing Inc., Indianapolis.

Leading instrumentation and control vendors are well aware of this fact, and have stepped up their customer service efforts in the last few years. "Service is a huge piece of the life-cycle value we deliver to customers," says Steve Mankus, vice president of worldwide operations, Fisher-Rosemount Systems Inc., Austin, Texas. "It's the key to longevity and to creating solid customer relationships. Service is more of a differentiator in today's market.

"In the past, service was looked upon as an extra," adds Mankus. "Today, it's expected. Several years ago, responding to customers in days may have been acceptable, but now, customers want answers in a matter of hours."

According to many instrumentation and control vendors, delivering customer service is becoming increasingly difficult, especially because of today's multi-vendor, open-systems environment. "The challenge for service providers is to be able to lower the overall cost of delivery, while at the same time improving customer responsiveness and the quality of support," explains Anthony Pichnarcik, manager of business development, services business unit, Honeywell Industrial Automation & Control, Phoenix.

"Ideally, no one needs service," concludes Joe Owen, director of commercialized engineering, global technical services, Rockwell Automation/Allen-Bradley, Milwaukee. "The trend in service is toward preventative and predictive areas, as opposed to reactive. The emphasis is on keeping end users productive by reducing the amount of downtime."



Rosemount's Series 68Q, 68, & 78 Platinum RTDs

TEMPERATURE INSTRUMENTATION, RTDS

- 1. Rosemount Measurement 27% 4.3
- 2.* JMS Southeast 6% 4.3
- Pyromation 6% 4.1
- Omega 5% 4.1

* Differences of fewer than 3% are of marginal statistical significance.



Omega's Quick Connect Special Probes

TEMPERATURE INSTRUMENTATION, THERMOCOUPLES

- 1.* Omega 11% 4.4
- Pyromation 9% 4.2
- 3. JMS Southeast 7% 4.4
- Rosemount Measurement 7% 4.3

* Differences of fewer than 3% are of marginal statistical significance.

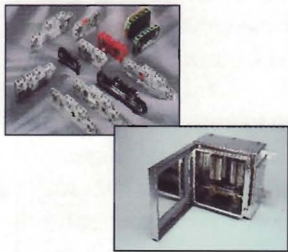


Rosemount's Model 3244MV

TEMPERATURE INSTRUMENTATION, TRANSMITTERS

- 1. Rosemount Measurement 48% 4.2
- 2.* Honeywell 8% 3.8
- Moore Industries 7% 4.5
- 4. Foxboro 5% 4.3

* Differences of fewer than 3% are of marginal statistical significance.

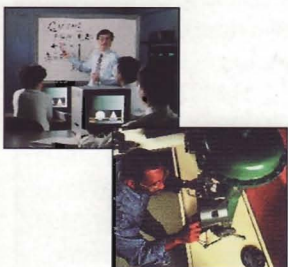


Allen-Bradley's QuickClamp Family
Weidmuller's WDU 2.5 Terminal Blocks

TERMINAL BLOCKS

- 1.* Allen-Bradley 25% 4.2
- Weidmuller 24% 4.2
- 3.* Phoenix Contact 12% 4.0
- Entrelec 10% 4.0

* Differences of fewer than 3% are of marginal statistical significance.



Allen-Bradley's Training
ISA's Training

TRAINING

- 1.* Allen-Bradley 16% 4.3
- ISA 15% 3.9
- 3. Fisher-Rosemount 10% 5.0
- 4. Honeywell 6% 4.5

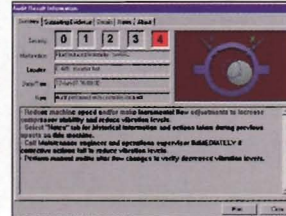
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Fisher Control's FloView

VALVES

- 1. Fisher Controls 61% 4.2
- 2. Valtek 6% 4.5



Bently Nevada's Machine Condition Manager 2000

VIBRATION INSTRUMENTATION

- 1. Bently Nevada 58% 3.9
- 2. IRD Mecanalysis 9% 3.5



Mettler Toledo's Flexmount Weigh Module

WEIGHING SYSTEMS/LOAD CELLS

- 1. Mettler Toledo 14% 3.5
- 2. Hardy Instruments 10% 3.8
- BLH 10% 3.5
- 4. Kistler Morse 5% 2.9

