

Edward Howard & Co.

Public Relations Counselors
in affiliation with Hall and Knowlton, Inc.
3021 Euclid Avenue
Cleveland, Ohio 44115
216-781-2400
FAX 781-8810

to: Roy Gottesman
from: Stan Ulchaker
subject: Vinyl Institute
Proactive Program Assessment

date: February 8, 1991
copies to: Nora Jacobs
Dan Stanowick
Pat Gallagher

This recommendation responds to your request for suggestions as to how the Vinyl Institute might assess the effectiveness of its proactive communications programs. As you phrased it, the Institute's board is asking, "How do we know that we're doing anything worthwhile?" What they really want to know is whether these programs are helping to achieve the objectives that the Packaging Council, Electrical Materials Council and PRO were established to meet: that is, to promote the use of vinyl in these three important markets. From a communications standpoint, there are two questions to ask:

- 1) Have we helped increase awareness for the use of vinyl in these markets, and have we increased awareness of the benefits vinyl brings to these markets?
- 2) Have we helped create greater understanding about vinyl's true performance in these markets (have we added to understanding or corrected misperceptions)?

We think it's also important to find out whether our audiences are aware, in general terms, of the activities that the vinyl industry has undertaken to promote the use of the material in their market. That is, have we become a visible player in the market?

Recommended Approach

To determine this, we recommend that the Institute conduct a focused opinion research study of several well-defined audiences within each market, using telephone interviews. Telephone interviews will enable us to complete the project on a timely basis, and assures that we reach the correct individuals within each target group. Because of its familiarity with the industry, and its demonstrated ability to deliver a professional product on time and on budget, we recommend that the firm of Cambridge Associates be retained to conduct the work.

Although each of the three task forces have different audiences, have undertaken different work, and are in different stages of their programs, we believe that they can be effectively evaluated as part of the same research project. However, each group will likely be treated separately within the project.

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It should also be noted that this research will not be designed as be a direct comparison to the findings uncovered in the original studies conducted by the three groups. As you'll recall, especially in the case of PRO and the Electrical Materials Council, the original studies primarily served as market research studies. That is, they enabled the groups to identify appropriate target markets and key messages. As it turned out, the groups that PRO and EMC eventually targeted for their programs were a small segment of the studies. As a result, we can make general conclusions about what their awareness levels were two years ago, but it would not be valid to quantify those levels and make a direct comparison to today's awareness among a larger sample of the same audience. The study will reference those initial awareness levels in a qualitative manner and, as much as possible, will be designed to gauge increased awareness by probing this area with the interviewees. In the following sections, we've outlined how we would construct an assessment of each group.

Pipe Resource Organization

PRO's program has been constructed around four product attributes, which were identified in the benchmark research conducted in June 1989. They are:

- durability
- strength
- cost-effectiveness
- ability to maintain water quality

The research will be designed to gauge awareness of these attributes among those individuals who have been targeted throughout PRO's communication's program. That is:

- public works officials and consulting engineers
- members of standards organizations

We will also want to determine what awareness these individuals have for the efforts that the vinyl industry has undertaken in the past two years. Because of the types of activities that PRO has undertaken, we feel the following groups should be included in this portion of the study:

- trade media editors
- key pipe industry influentials

A list of interview candidates would be developed from the following sources:

- *American Water Works Association Journal* subscribers
- existing media lists
- PRO's key influentials mailing list
- PRO'S data base

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Based on the estimated size of the four audiences listed above, a total of 160 phone interviews would be conducted.

Electrical Materials Council

The Council has consistently communicated three major messages about the use of vinyl in this market, based on the benchmark research conducted in April 1989:

- fire safety
- general electrical and physical performance properties
- established record of safe use

Awareness for these attributes would be measured among:

- electrical consulting engineers and specifiers
- code officials

In addition, the following groups should be surveyed to gauge awareness for heightened industry activity:

- trade media editors
- vinyl industry customers

A list of interview candidates would be developed from the following sources:

- Council data base
- *EC&M* subscribers
- existing media lists
- special customer list (would need to generate)
- special code officials list (if not available as part of *EC&M* subscriber list or Council data base)

A total of 260 phone interviews would be conducted.

Vinyl Packaging Council

The Council has built its campaign around the following product attributes:

- aesthetics (clarity and gloss)
- design versatility
- low odor and taste

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Awareness for these attributes would be measured among:

- packaging engineers and designers
- packaging users (product and marketing managers)
- packaging manufacturers (blow molders)

In addition, trade media editors should also be surveyed to gauge awareness for heightened industry activity.

A list of interview candidates would be developed from the following sources:

- Council data base
- selected SIC code subscribers of *Food & Drug Packaging*
- existing media lists
- Council blow molder list

A total of 260 phone interviews would be conducted.

In the case of the Packaging Council, it should be noted that the recent bottled water survey provides some indication of success in that market segment. Sections of that study will be incorporated in this research report as appropriate.

Format of the Final Report

Cambridge Associates will prepare a standard report of the project, including a description of how the project was structured, the content of the questionnaires, the individuals contacted and an analysis of results.

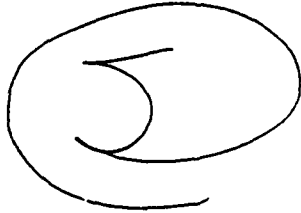
In addition, we recommend that the project include a review of the groups' major activities to date, results generated and an analysis of the markets in which they have operated -- now, and at the times the various programs began. Edward Howard & Co. would prepare this section of the report.

Timetable and Estimated Costs

Cambridge Associates estimates that it will need four to six weeks to conduct the survey and complete the analysis and report once the survey is approved and the list of interviewees has been compiled. Accordingly, we should budget about eight to ten weeks to undertake the entire project. Cambridge Associates has provided an estimate of \$22,950 to conduct a study of the magnitude described above -- that is, telephone interviews (approximately five minutes in length) with 680 individuals. In addition, we estimate \$7,000 in EH&Co. fees to work with Cambridge Associates in development of the study and to prepare the other program evaluation components described above. Although it may not be necessary, we should also earmark about \$500 to purchase lists from the three

publications listed. The project total -- \$30,450 -- is below what each group might expect to invest in individual follow-up benchmark research, and having these results likely will mean that these groups can delay further broad-based work of this nature until FY 92-93.

I will call you Tuesday to follow up.



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