

OPINION SURVEY

Politically Active Individuals,
Chemical Industry Neighbors and
Influential Opinion Leaders
Look at Chemical Issues

Overview and Summary

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Prepared for
The Chemical Manufacturers Association

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Overview and Summary

In general, the data from this survey show that the chemical industry is regarded by Americans in a relatively favorable light and is perceived to be reasonably truthful. At the same time the industry is seen as misdirecting its efforts toward such problems as product and worker safety instead of toward problems people see as more pressing such as chemical waste disposal.

Industry images in general

In terms of overall industry favorability, we see:

- * The chemical industry is rated fourth most favorably in a field of six (oil, nuclear, chemical, retail, banking, chemical) by politically active individuals and chemical industry neighbors, and fifth most favorably by media, government, and educator opinion leaders.

- * On the question of truthfulness, the chemical industry fares about the same. It is seen as fourth most truthful among politically active individuals, chemical industry neighbors, and two of three opinion leader groups. Only media opinion leaders rated the chemical industry as the least truthful of the six.

Chemicals and the chemical industry

When people were asked to articulate their feelings on the chemical industry in particular, we found that:

- * "Drugs" was the primary response to the open-ended query: "When you think of the chemical industry — what kinds of things do you think of?" among both politically active persons and chemical industry neighbors.
- * Three-quarters of all opinion leaders responded to the above question with generally neutral comments, while the balance of their comments were split nearly evenly between the positive and the negative.
- * "Drugs" was also the most frequently volunteered response among politically active individuals and chemical industry neighbors to the question of what they think of when they hear the word "chemicals".

On the question of whether the chemical industry is generally concerned about the public welfare, we saw:

- * Majorities in every sample category except educator opinion leaders felt the industry was, to some degree, "unconcerned" about the welfare of the average person.

The primary focus of the CMA's Chemical Communications Plan is the transmission of the industry's positions on five key issues: waste disposal, general air and water pollution, product safety, worker safety, and chemical transportation. We asked respondents to rate the level of concern they felt toward each issue and found:

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Cambridge Reports, Inc.

- * Waste disposal was far and away the issue that consistently garnered the highest levels of concern, ranging from 56% "extreme" concern among media opinion leaders to 27% "extreme" concern among chemical industry neighbors.
- * Fully 93% of politically active individuals said they were either "extremely" or "very" concerned about the disposal of waste material from chemical plants.

Interestingly, when we asked our respondents how concerned they think the chemical industry is about each of the five key issues, we found:

- * Waste disposal was perceived to be the issue of least industry concern by both politically active individuals and chemical industry neighbor samples.
- * All three groups of opinion leaders also rated the level of industry concern about waste disposal significantly lower than their personal concern.
- * The industry received the lowest ratings for concern about general air and water pollution from educators and government opinion leaders, while transportation of chemicals was seen as an area of least industry concern among media opinion leaders.

When asked to assess the efforts made by the chemical industry to reduce the dangers posed by the five key issues, we saw:

- * Generally, majorities in all sample groups felt the chemical industry had contributed at least "some effort" over the last two years to all five key areas.

- * Product and worker safety emerge as the perceived areas of greatest industry effort among politically active individuals and chemical industry neighbors.

Turning to the key question of what people want to know about the industry or chemicals in general, we found:

- * Among opinion leaders and politically active individuals, chemical waste disposal was the chief volunteered topic of desired information.
- * Among chemical industry neighbors, air and water pollution was the primary area of desired knowledge.

When asked to specify the most pressing overall environmental issue, we saw:

- * Most politically active individuals and chemical industry neighbors chose air pollution as their top environmental concern.
- * Water pollution was mentioned as the second most important environmental problem by both samples.
- * A majority of opinion leaders mentioned issues other than chemically related ones as their chief environmental concerns. About three in ten opinion leaders did offer a chemical-related response.

Communication issues

On the question of general awareness of already existing risk-reduction communications, we found:

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- * Fifty-five percent of politically active individuals say they are unaware of any efforts to communicate to the public any progress made in reducing the risks of potentially hazardous chemicals.
- * Forty-nine percent of chemical industry neighbors are similarly unaware.
- * Majorities of all three opinion leader groups say they are aware of such communications efforts.

Shifting our emphasis from general risk-reduction communications to specific advertising, we found:

- * Of those who recall having seen such risk-reduction advertising, most remember it as dealing with protection of the environment.
- * Majorities of politically active individuals and chemical industry neighbors cannot recall a specific sponsor.
- * Of those who can recall a sponsor, most politically active individuals and chemical industry neighbors say DuPont Chemical was the advertiser, while one in five opinion leaders recall Dow Chemical as the sponsor.
- * Forty-four percent of the politically active individuals, 32% of chemical industry neighbors and 38% of opinion leaders recalled receiving their risk-reduction advertising through the medium of television.

Turning to the chemical benefits advertising:

- * Fifty-four percent of politically active individuals, and 58% of chemical industry neighbors say they are unaware of any such advertising.

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- * Majorities in each opinion leaders category said they had seen chemical benefits advertising. In fact, more than three-quarters of government opinion leaders say they recall having seen such ads.
- * Primary content recall centered around the following themes: "We can't live without chemicals", "Chemicals help plants and vegetables grow", and "Chemicals are beneficial to humans".
- * A majority of politically active individuals (54%) could not recall the sponsorship of chemical benefits advertising they had seen, though among sponsors who could be recalled, DuPont Chemical was the primary choice among all three sample groups.
- * Once again, television was the predominant medium for these advertisements, being the prime source of majorities in each category.

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Interestingly, recall of specific news stories about chemicals or the chemical industry is relatively low:

- * Majorities of politically active individuals and neighbors — 53% in both cases — are unable to remember any news reports or stories they've seen recently.
- * The largest single mention in any of the sample groups was Love Canal, with one-quarter of the opinion leaders recalling stories of this incident.
- * Chemical dumps and waste disposal were the second and third most frequently recalled topics among the opinion leaders, with slightly less than 1 in 10 mentioning stories they had seen on these issues.

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It is significant that strong majorities in every sample group feel that news stories and feature articles on the chemical industry are at least "somewhat unfavorable" in their orientation.

In the area of general communication findings, we see:

- * Time and Newsweek are the most frequently read periodicals among all sample groups, with the highest readership among media opinion leaders (70%).
- * The New York Times and the Washington Post garner the top readership honors among newspapers tested, with fully 96% of all government opinion leaders "almost always" or "frequently" reading the Post. In addition, eight of ten media opinion leaders say they read the Wall Street Journal at least "frequently".
- * In addition, regular readers of these four news sources tend to be slightly more favorable toward the chemical industry than their counterparts who read them less frequently.