

# Perception of Solvents among Opinion Formers 2009

## Summary



### Background

The European Solvents Industry Group (ESIG) represents Europe's major solvent manufacturers including companies such as BASF, Dow Chemical, ExxonMobil Chemical Europe, Shell Chemicals and Total Fluides. Created in 1996, ESIG acts as focal point for all solvent-related questions in Europe and tailors its communications to its various audiences including regulators, solvent-using industries and selected media. The group fosters best practice in solvent usage, and in health, safety and environmental protection. ESIG members are committed to Responsible Care® and to the principles and practice of Product Stewardship.

ESIG member companies also participate in the work of the European Solvents VOC Co-ordination Group (ES-VOC-CG) which represents the views of roundabout 30 European solvent-using industries on issues relating to the safe management and use of solvents, health and the environment.

Integral to ESIG's programme is ensuring that it captures the views and opinions of its stakeholders. To this end, ESIG regularly undertakes surveys among opinion leaders: in the summer of 2009 an independent research institute was commissioned to carry out a study into the awareness and effectiveness of ESIG and its messages.

This is the fourth survey of its kind, enabling us to track progress over time. Below you will find the design of the survey and a summary of the main findings.

### Key Highlights

- There is a high awareness of ESIG and what it does, with increasing growth over the years. ESIG continues to be seen as a credible and responsible organisation showing a balanced view and supplying helpful information to those involved in any way with the solvents industry.
- The legislative agenda of the last few years has meant that solvents have been kept top of mind but there is increasing acceptance that solvent use is essential and that the industry is behaving responsibly. REACH has brought recognition of the need to act responsibly. Regulators are fully aware of the issues and seem less anxious than in the past.
- The environment is likely to stay the same; the industry is surviving and keeping its integrity via the actions of all stakeholders; regulation will stay but the industry is learning to be aware of it and work within it.
- There is still strong awareness of the issues relating to solvents – air quality, ozone & emissions and worker safety/protection remain top of mind though slightly fewer mention the environment and health issues generally than a few years ago.
- There seems to be an acceptance that solvent **producers** are doing their best in terms of behaving responsibly though smaller solvent **users** continue to cause some concern for some. There is a wish that smaller users and downstream users continue to be given encouragement.

- ESIG was seen as having promoted the industry with energy and even-handedly, comparing well to other Trade Associations despite some limitation on resources.
- Favourability to solvents is high with 94% saying they are very or fairly favourable.
- Most envisage that use of solvents will remain similar in the future with 57% saying they are likely to use them “the same as before”. Compared to 2005, twice as many (now 16%) said their solvent use is actually likely to increase. Large customers however are less likely to see their use of solvents increasing; it is the smaller customer that is more optimistic about solvent use.
- ESIG’s communication material is seen as useful, in particular the website (increasingly used as a reference resource) and the “Solutions” newsletter. All activities score highly in terms of usefulness though the communications are still not reaching as many in the industry as it would be useful to reach. In general ESIG is seen as communicating well and appropriately, being approachable and accessible, with its DVDs, information packs, awards, guidelines and newsletter all contributing to information flow and to the sense that the industry is behaving as well as possible.
- Stands and exhibitions and any opportunity for personal contact are very much appreciated and in particular by key opinion formers.
- Customers feel rather more remote from ESIG than in the past, though those in authority feel that ESIG has tried hard to communicate with downstream users. Customers themselves do not feel they are that close to ESIG, less close than they were. This is a major challenge in the future and one where Members can help actively promote what is available to those further down the chain with whom they have contact.

- ESIG and the industry seem to have navigated the last few years well, in particular given the tide of legislation. ESIG is seen as making a positive and balanced contribution during a period when the industry has been undergoing challenging times.
- ESIG is well thought of and continues to communicate important messages. We can say that at this time key opinion formers across Europe are rather more favourably than unfavourably inclined towards solvents and this is a good result.

### Research Methodology

Response Consulting Ltd conducted a total of 83 interviews with key opinion formers across Europe. Structured telephone interviews took place with 70 and a further 13 qualitative in-depth interviews were conducted.

#### Who did we speak to?

Customers	34
Distributors	18
Trade Associations	17
Regulators	5
Trade Journalists	5
NGOs	4
<b>Total</b>	<b>83</b>

The results for each main audience type are meaningful because of the small “universe” and the relative importance of the people interviewed. Respondents were spread across Europe and the interviews were conducted in several different languages. Those asked for an interview were generally very cooperative and more than happy to give their time, an indicator of the strength of goodwill felt towards ESIG. More could have been interviewed but in research terms it was better to keep the sample size and make-up consistent with previous waves of research – undertaken in 1999, 2002 and 2005 respectively.

## Main Findings

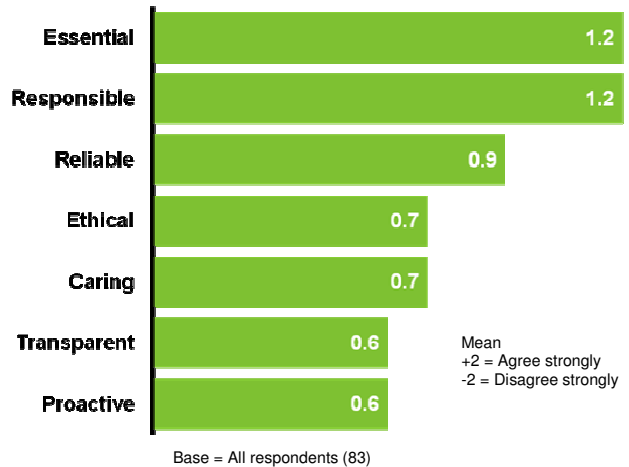
### 1. Knowledge and perception of the Solvents Industry

One of the aims of ESIG is to improve understanding of the industry.

- Knowledge about ESIG and its products has increased over time for most opinion formers. The regulators in particular are much more knowledgeable than in the past – now 80% of them say they know “a fair amount” about the industry compared to 25% six years ago. Three quarters of customers, however, say they only know “just a little”.
- Looking more broadly at the solvents industry and its products, most do feel **reasonably** knowledgeable, although maybe not surprisingly, only a fifth of those interviewed feel they know the industry or its products “very well”. Regulators seem better informed than in the past.
- Thirty five percent of customers continue to say they only know “a little” about the industry, so there are still opportunities for greater communication about the industry and what is happening.
- Solvents remain associated with the same areas of use as in previous surveys: paints and coatings, cleaning, adhesives, detergents, printing, household products. Their association with crop protection and water treatment in particular continue to be less well known.
- The solvent industry today is strongly associated with positive characteristics - the industry is seen in particular as being essential, responsible and reliable, these being even slightly stronger associations than transparency and proactivity.

### Perceptions of the Solvent Producing Industry

Thinking about the Solvent Producing Industry to what extent would you agree that it is . . .

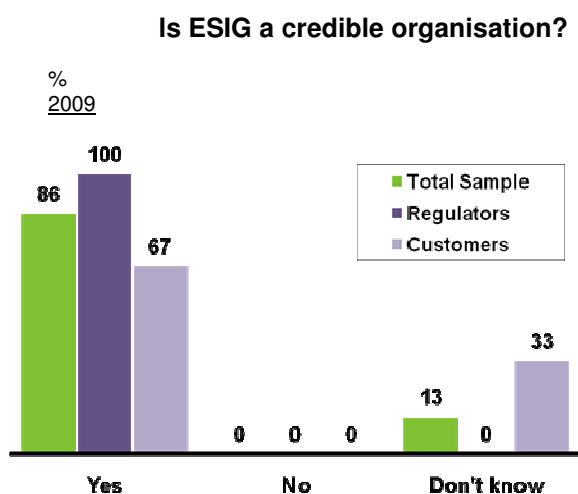


- There was widespread recognition of the efforts solvent producers are making to behave responsibly. There remain some concerns, particularly amongst Regulators, with regard to solvent users in small companies, an area that should continue to be addressed by ESIG in the future. “*Smaller companies do the job first and then think of the environment*” Regulator.
- There is however strong acknowledgement that the industry is making an effort to behave responsibly and well and evidence that, due to REACH and the way the industry has reacted, regulators are less anxious about solvents than before.
- The need for ESIG and companies to promote communications materials and share information with downstream users was strongly expressed this year. It is crucial that members of ESIG increase access to helpful materials and information to the end users.

### 2. Knowledge and awareness of ESIG

- ESIG is but one of several channels of information about solvents. Personal experience is the most important followed by producers, though literature and the web, knowledge of the solvents industry in general, meetings, acquaintance with ESIG, users, and legislation are all spontaneously mentioned by around/just under 10%.

- Consistent with previous years, close to 90% of the sample view ESIG as a credible organisation that represents industry views with authority. This credibility comes in particular from the good record on REACH and good communication materials. Regulators again register the biggest increase. A third of customers however say they “do not know” about ESIG’s credibility, more than in 2005. In this context, member companies could well act as multipliers of ESIG messages and material.



- ESIG’s messages are seen by the great majority as being clear and understandable. The one exception are Customers who are more likely not to know.
- When asked spontaneously, those aware of ESIG believe its key messages are:
  - > Communicating health and safety information
  - > Advice on safer solvents and danger
  - > The importance of solvents and how essential they are (a newer & stronger message this year)
  - > Encouragement of best practice
  - > Education on environmental issues.

The theme was one of guidance, education and safety but this year also coming through was the message about how **essential** solvents are, a new message compared to previous years.

- All except Regulators and Business Journalists were asked about how supported by ESIG they felt. The majority feel well supported by ESIG with Distributors, other Trade Associations and NGOs giving a particular strong response; but fewer Customers this year say they feel well supported, only a quarter of them saying they do. Most Customers just “do not know”; again, this points to a requirement for more focus on supporting customers. It is evident that most of those ESIG deals with however feel very well supported by the organisation in terms of contact and information.
- Asked about how ESIG compares with other trade associations, most feel it compares well: *“They (ESIG) seem very proactive in involving the press and their membership and in producing useful literature”* Journalist.

Examples of ESIG comparing well included ESIG’s proactivity, communicating well with downstream users, its enthusiasm (in the face of a possibly contracting industry), its translating its information into many languages, its sense of mutual dialogue and sharing, its production of useful literature, its professionalism and good organisation and its European stretch. Several commented however that compared for instance to the German national association VCI, ESIG seems rather under-resourced.

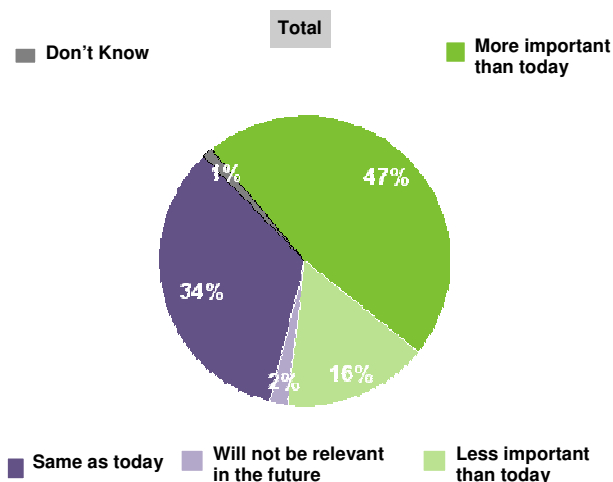
- Most feel that ESIG has been constructive in the regulatory debate; when asked spontaneously about what legislation they are aware of, 48% of customers and distributors mention REACH – higher than last time and eclipsing other Directives, but it remains true that not everyone is as highly aware of legislation as one might expect.

### 3. Image & Perceptions of Solvents

Perceptions of the solvent industry are improving

- Environmental, Health/Social and Safety/ Worker protection concerns continue to be the issues most commonly associated with solvents.
- With regard to the environment, VOCs and ozone/air quality remain the most common concerns although overall there were rather fewer environmental mentions than in recent years. Stratospheric ozone depletion & global warming, indoor air quality and water damage were not as salient as the other issues but were all mentioned by a small percentage. For Health and Safety issues, no specific one issue was picked out, but just a general feeling by about a quarter that there are issues in this area. Safe handling (flammability, accident control, transportation) were the issues associated in particular with worker protection. Other issues were legislation (and keeping up with it), the cost and the need to maintain the profile of the industry.
- Solvents continue to be very important in the issues they raise with 51% saying they are “top of the list” or “more important” than issues relating to other chemicals and products. All the regulators said that the issues raised by solvents are “the same as others” i.e. no more and no less important. The situation seems to be stable, though the regulators are keeping a watching brief on air quality, ozone and emissions.
- In terms of the future (see below), there was a relatively even split generally in terms of those who see solvents becoming more important than today and those who see them remaining the same or just not being able to answer. Of the Regulators, only one saw solvent issues becoming more important over the next 3 to 5 years and four saw them as “staying the same”.

How do you see things changing over the next 3 – 5 years – will issues relating to solvents become . . .



Base = Total (83)

- For those who are knowledgeable enough to answer, ESIG is widely seen as having been constructive in discussions on lobbying about legislation.
- The three main product benefits of solvents cited were, as in 2005, product effectiveness (solvency), good cleaning power and quick/ tailored drying speed. More benefits were mentioned spontaneously this year than in previous years. There is now far more acceptance that solvents are “here to stay”.

*“They’re indispensable for the pharmaceutical industry as well as for the extraction industry” Distributor .*

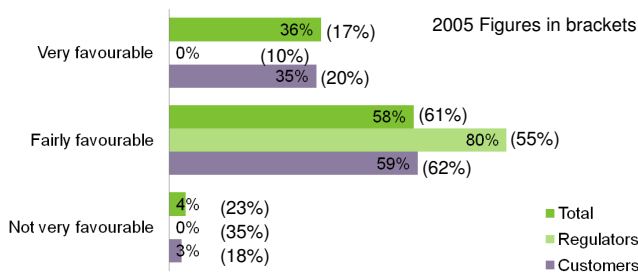
*“Many formulations stand or fall with solvents as reactants or converting medium” Customer.*

- Perceptions of the solvents industry are improving – in 2009 there has been a marked increase in those feeling favourably disposed towards solvents with 94% saying they feel very or fairly well disposed compared to just 78% in 2005. Those expressing the highest favourability were the Distributors and interviewees from Spain and the UK.

- Regulators feel “fairly well disposed” to solvents or very favourable (compared to 2005 where a third said they were not favourable). In part this favourability on behalf of regulators is due to the fact that there are sometimes options: *“Fairly favourable. Sometimes you cannot use anything other than solvents but often now you can”* Regulator.

**Thinking of all you have read about solvents to what extent are you favourably disposed to them?**

Favourability to solvents - %



Base = Total Sample (83) / remainder no answer

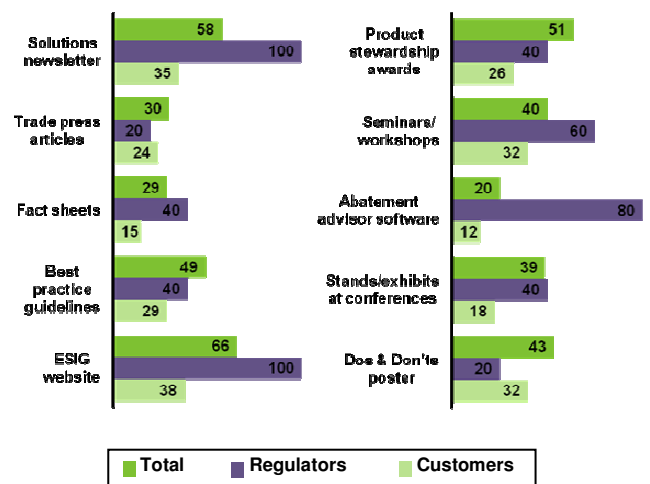
- Future use: 57% of the Customers interviewed are likely to use solvents to the same extent in the future, while 24% are less likely to use solvents (compared to 30% in 2005). A higher number of **large** Customers however, (41%), thought they would use solvents less – it is the smaller customers and distributors especially who are more optimistic about continuing levels of use.

**4. Awareness of ESIG’s Communication Activities/Initiatives**

- There is high spontaneous and prompted knowledge of the various ESIG communications materials and activities. They are seen very positively and play an important role in keeping information on what is happening in the industry, on legislation and key events flowing across the various constituencies and different countries.

- ESIG’s website is now the best known of ESIG’s communication initiatives, followed by (in order):
  - > The “Solutions” newsletter
  - > ESIG Product Stewardship Award
  - > Best Practice Guidelines
  - > Do’s and Don’ts poster.
- Awareness of the ESIG website has grown substantially, providing a constant form of reference about the industry, people, best practice and events. Though the website is the most widely known, the top two most useful materials are the Dos and Don’ts poster and the Best Practice Guidelines. All the activities and materials score well however in terms of usefulness. Some support tools such as the Abatement Advisor or the DVD on safe handling are very useful to those that use them but these are in the minority. The new materials such as information pack and brochures are well received. Overall communication activities and initiatives score high on usefulness for those that know about them, the greatest challenge, as before, being to extend general awareness and cascade the information to a greater extent through the industry.

**High Prompted & Spontaneous Awareness of ESIG Communications Activities or Initiatives**



Base = All respondents (83)

- Personal contact continues to be very important - *“Personal contact is essential for us” Regulator; “The emails are useful but the personal contact keeps you in mind a long time” NGO.*
- Presence at conferences, trade fairs and seminars gives the opportunity for more dialogue – *“They have helped me to understand the environmental implications regarding ozone impact and VOCs” Trade Association.*
- ESIG continues to be seen as using the right tools and channels to communicate in today’s world and remains a first port of call for many when they are looking for information and a major source of information and reference.

**Once again we would like to thank all those who participated and contributed to the ESIG Opinion Survey.**

If you require further information about the European Solvents Industry Group or the results of this survey, please contact:

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