

essencia Image and satisfaction survey

Report – Wave 12

At the request of Isabelle Descamps, essencia – 25.03.2019



essencia



Conclusions & Recommendations (1)

✓ **Positive results, in line with previous years**

However:

- **Participation level lower in 2019** versus previous years

In 2019:

- ✓ **Excellent satisfaction score: 91%**, among which 30% are very satisfied
- ✓ **Average satisfaction score: 4,2/5**, in line with previous years (since 2012)
- ✓ **Image: 92%** have a positive image, among which 33% excellent
- ✓ Average image score: 4,2/5, in line with previous years (since 2012)
- ✓ **44% perceive a positive evolution** (progress) of essencia **vs last year**. Essencia go on with the positive trend
- **However: slight decrease on 'very satisfied' on a few KPI's** (see *infra*)



Conclusions & Recommendations (2)

Key strengths: (spontaneous) Continuity with previous years, and in line with members' expectations

- ✓ **Representation chemical industry / defends the interests** of its members / Image sector
- ✓ **Information / Communication:** complete, up-to-date and 'to the point' information
- ✓ **Expertise / Competence / Knowledge** (essenscia staff)
- ✓ **Service to member** / Partner / Support and advice (tailor made)
- ✓ **Facilitates networking / Working groups / Study days-workshops**
- ✓ **Long term vision** (for some / also opportunity for improvement)

Key weaknesses / Opportunities to improve: (spontaneous) (NB. Less comments vs strengths)

- **Image of the sector: still relative 'bad' image** among general public (cf. environmental impact) /Opportunity to organize more actions to attract youth
- **Website/ extranet still not enough user-friendly** for some: lack of overview, complex search, not attractive
- **Lack of interest for SME** (focus: Big)
- **Scope/role of essenscia a.o. sustainability / climate** (NB. even more in 2019) → Even more attention on this important topic is expected!
- **Heterogeneity of the sector** / sometimes conflict of interest
- **Challenge to adapt to fast changing environment** (even more in 2019)
- **Gap between 'theory' and 'practice'**
- **Service (few issues):** availability, staff rotation + challenge to stay 'ahead of things' in this fast changing environment

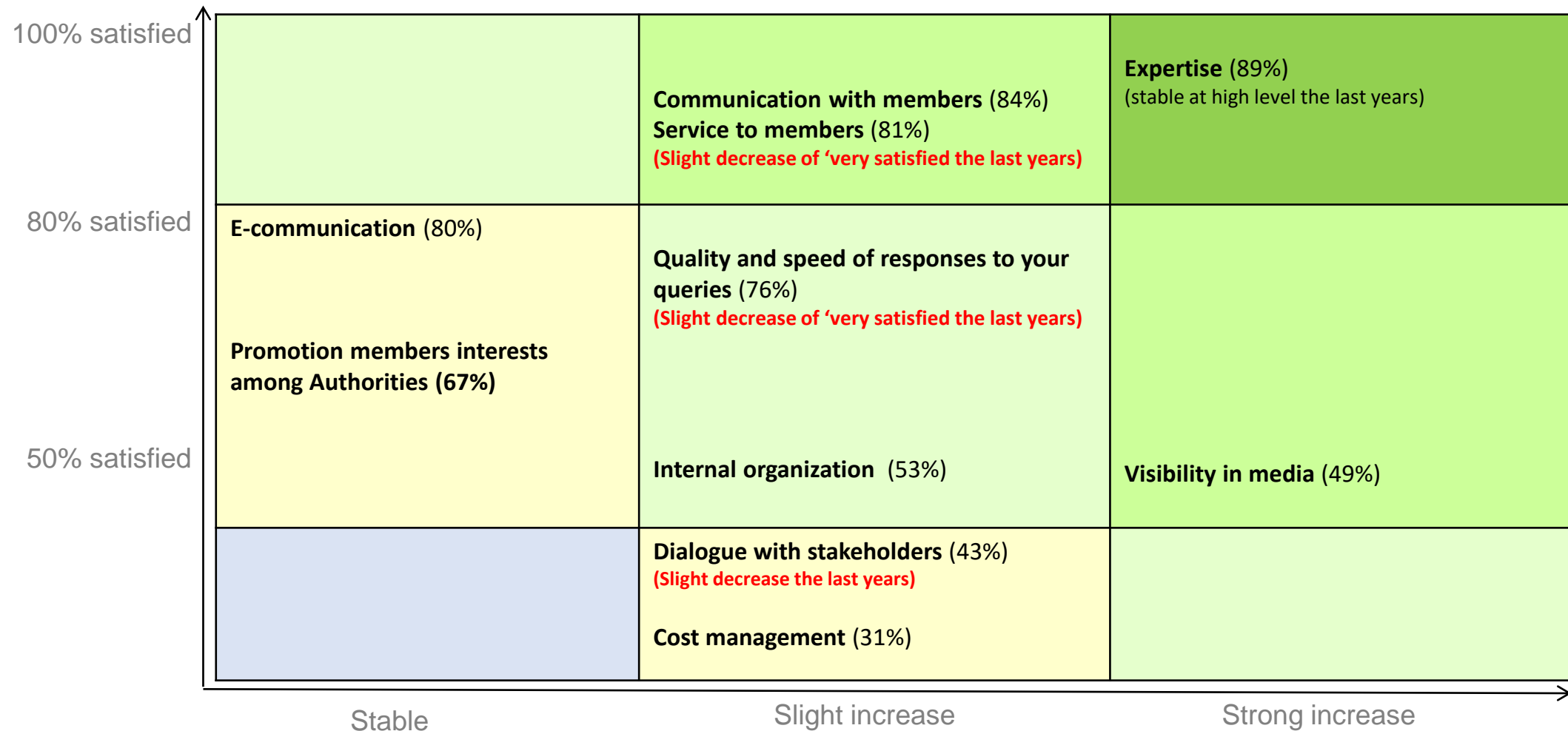


Conclusions & Recommendations (3)

Satisfaction on several criteria (prompted)

+ LT evolution (2008-2019): Overview

SATISFACTION The LT trend is positive for most KPI's / Watch-out: slight decrease of some KPI's on short term



LT EVOLUTION 2008-19

Conclusions & Recommendations (4)

- There is a **great fit between the strengths of essenscia and the priorities**
The TOP action pillar becomes the promotion of members interest:
 - ✓ N°1 : The promotion of members' interests among Authorities
 - ✓ N°2: The service level towards its members
 - ✓ N°3 : The expertise of essenscia staff
- **Other action pillars (on top of the list tested):**
 - **Promotion image sector**/value chemistry among public opinion + Make it **attractive for Youth/ Link with schools**
 - **A vision**/ more future oriented / **Sustainability / societal role**
 - **Extranet / app / webinars / 'one pagers'**
 - **Active collaboration between members**, essenscia + Best practices
 - **Synergies with other Organizations + European** scope
 - More interest for **SME's**

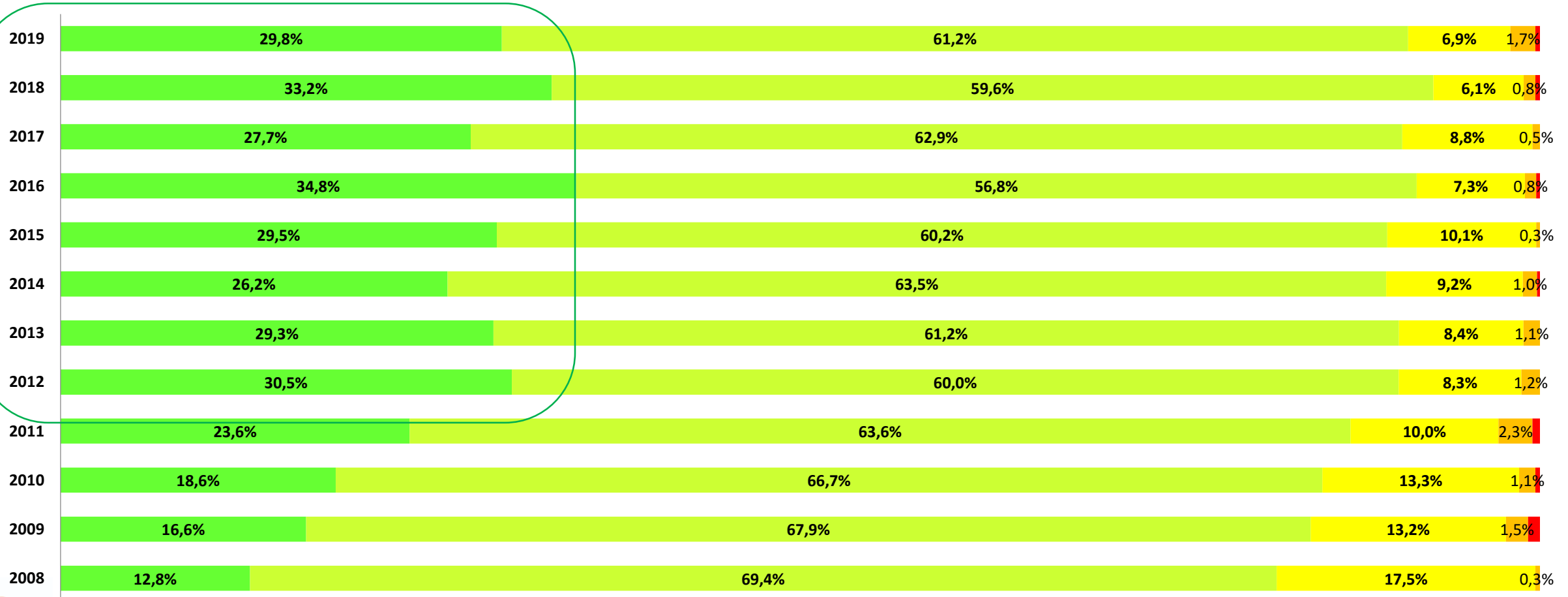
essencia: global satisfaction: excellent satisfaction score: 91%

Above 90% since 2012 / 30% very satisfied

Question: "What is your global satisfaction of essencia?"

Global satisfaction essencia 2008-2019

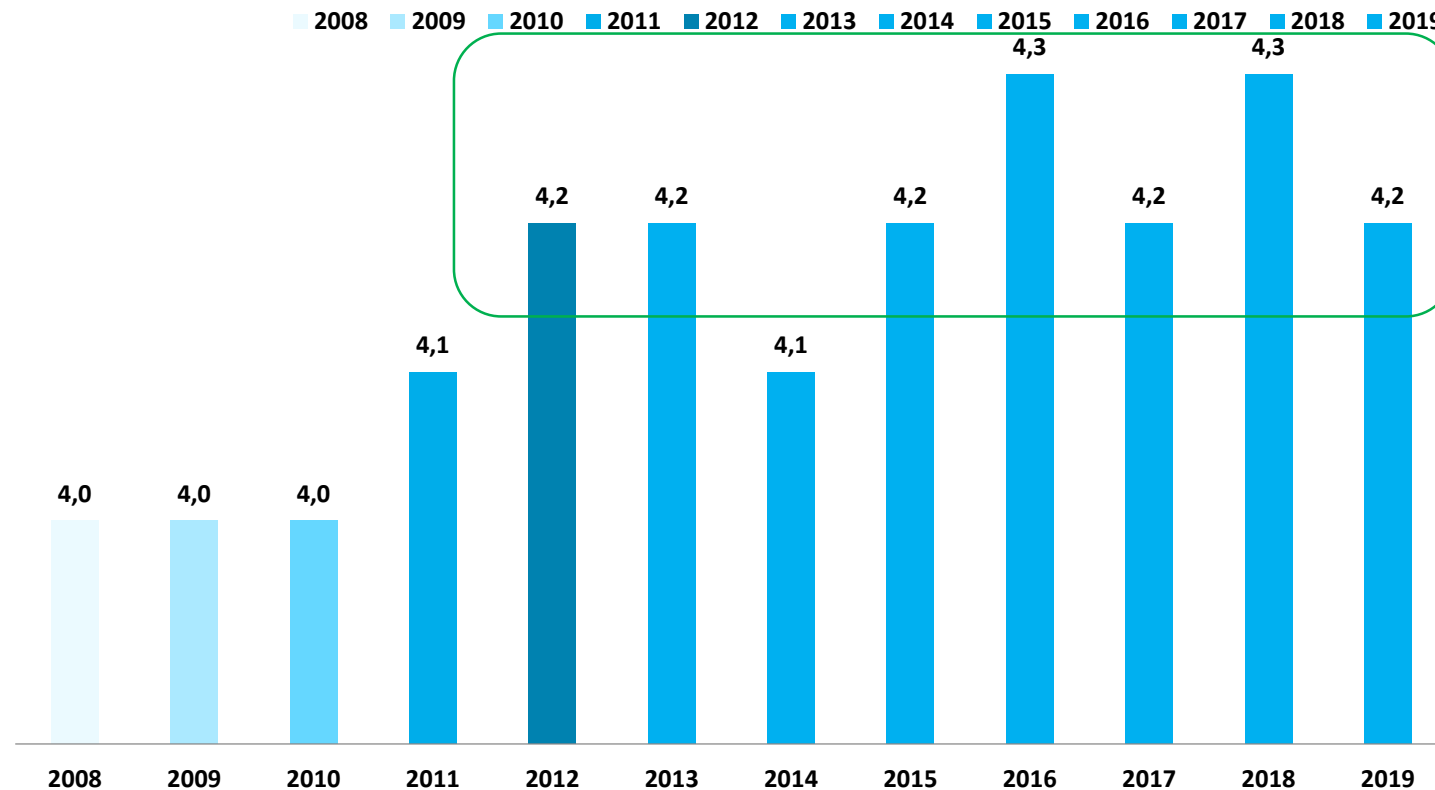
Très satisfait Satisfait Neutre Pas satisfait Pas du tout satisfait



Average satisfaction score: 4,2 on 5 = in line with previous years (since 2012)

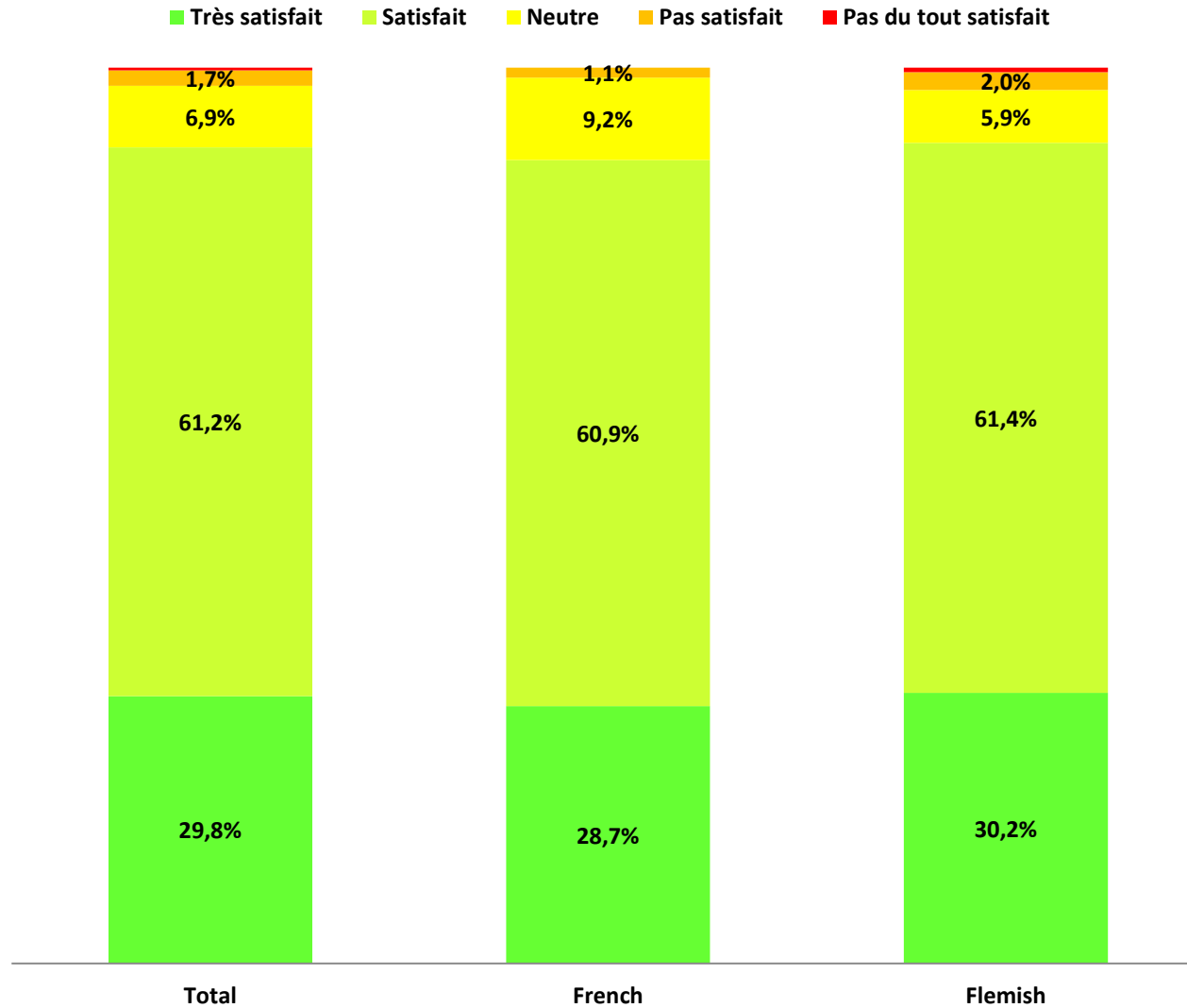
Question: "What is your global satisfaction of essenscia?"

Global satisfaction - Average score /5



essencia: Satisfaction is comparable NL/FR (very slightly higher among NL)

Global satisfaction essencia



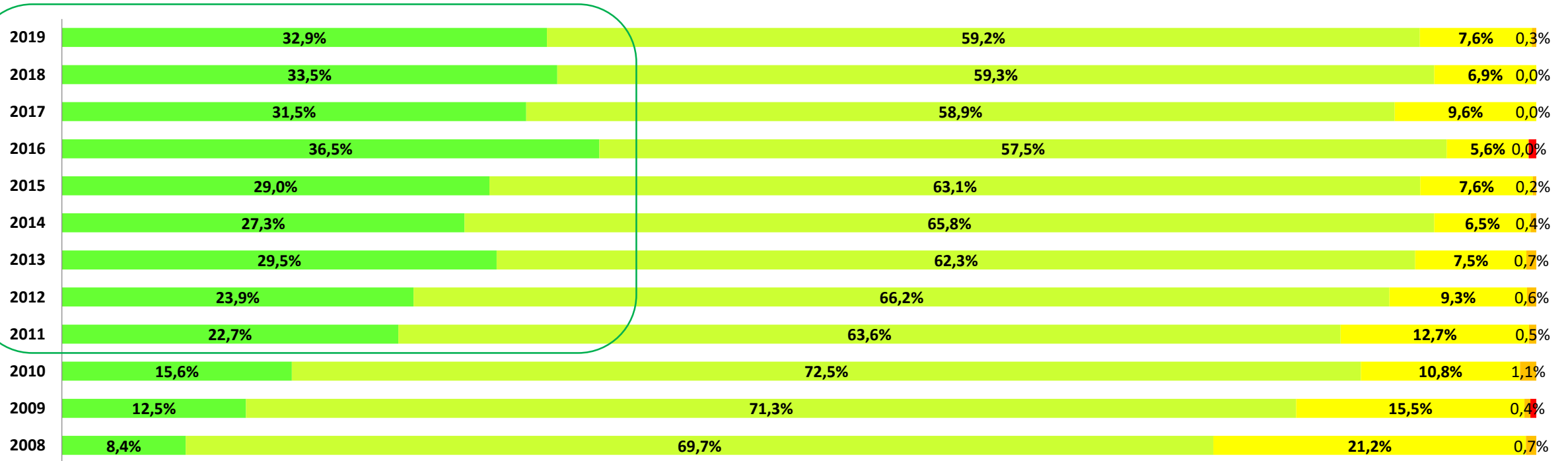
essencia: global image: 92% have a positive image, among which 33% excellent

Average image score: 4,2/5

Question: "What is your global image of essencia?"

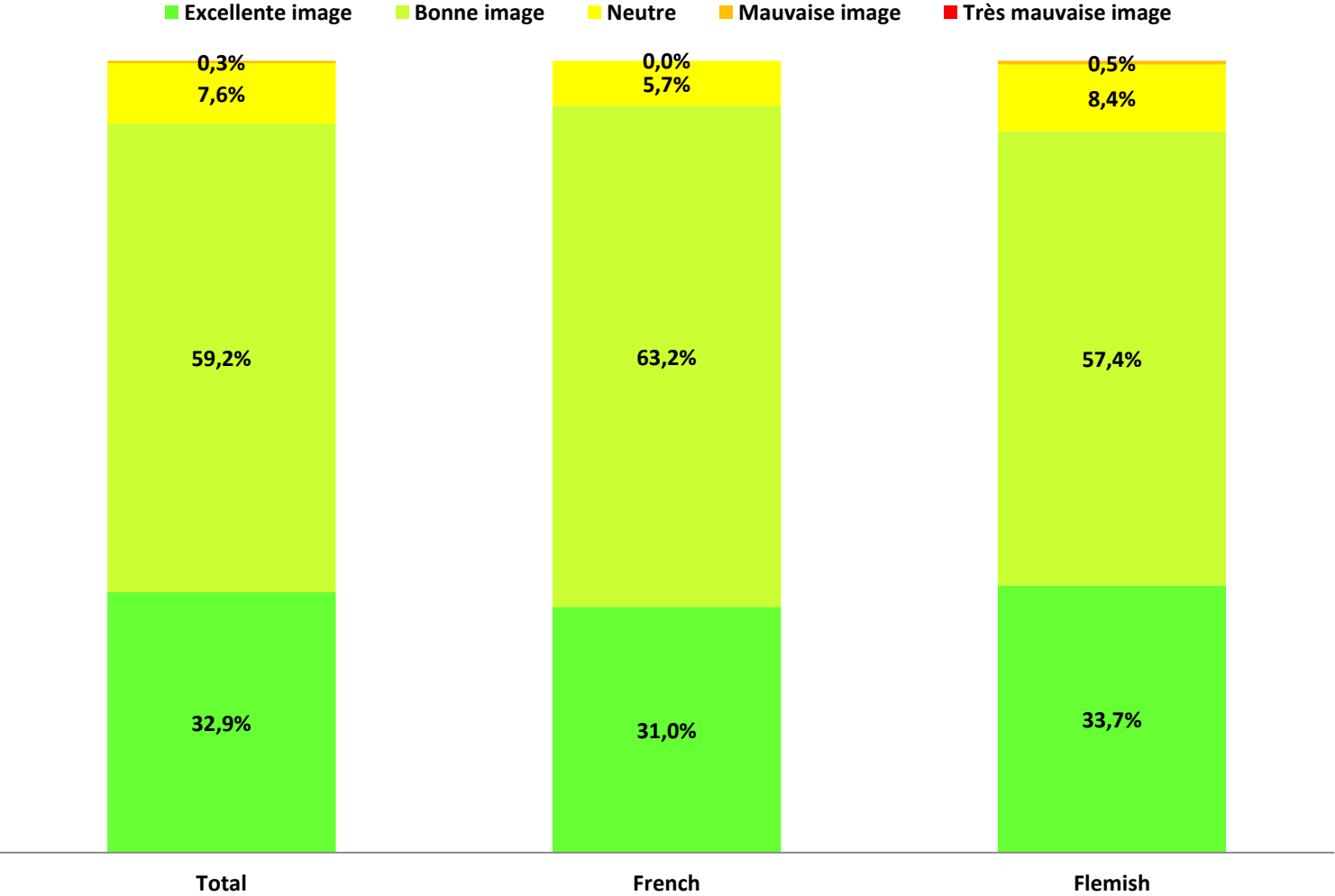
Global image essencia 2008-2018

■ Excellente image ■ Bonne image ■ Neutre ■ Mauvaise image ■ Très mauvaise image



essencia: global image is comparable NL/FR (slightly better among NL)

Global image essencia



essencia: strengths: overview (spontaneous)

Open question: "According to you, what are the strengths of essencia?"

Results in continuity with previous years / Many strengths, in line with members' expectations:

Representation chemical industry / defends the interests of its members / Image sector

Information / Communication

Expertise / Competence / Knowledge

Service to member / Partner / Support and advice

Facilitates networking / Working groups

Long term vision

essenscia: weaknesses: overview (spontaneous)

Open question: "According to you, what are the weaknesses of essenscia?"

Results in continuity with previous years. However, some topics get more attention¹



Image of the sector
(even more in 2019)

Communication (website/
extranet, others)

Lack of interest for SME
(focus: Big)

Scope/role of essenscia a.o.
sustainability / climate
(even more in 2019)

Heterogeneity of the sector /
sometimes conflict of interest

Challenge to adapt to fast
changing environment
(even more in 2019)

Gap between 'theory' and
'practice'
(even more in 2019)

Service (few issues)

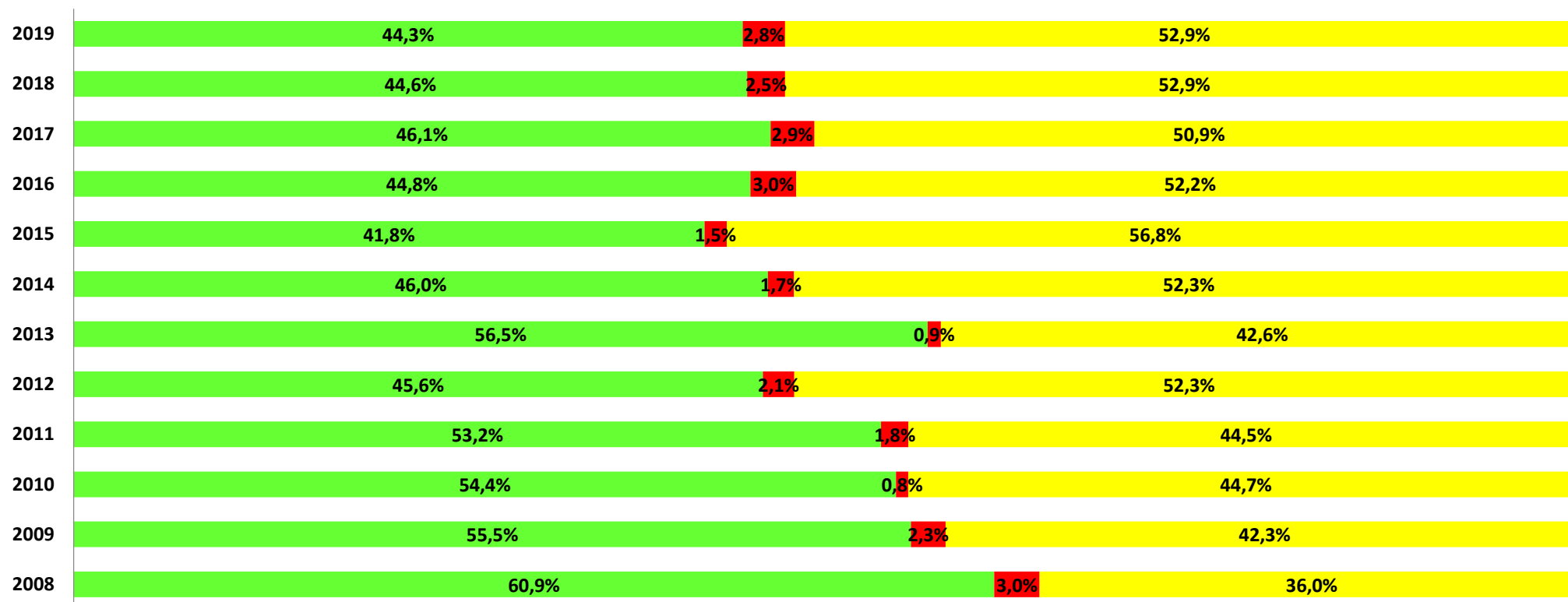
Others

essencia: evolution: 44% perceive a positive evolution (progress) of essencia vs last year. Essencia go on with the positive trend

Question: "Globally and according to your own criteria, would you say that essencia is rather "in progress" or "in decline" versus last year?"

Progrès vs recul

■ En progrès ■ En recul ■ Sans opinion



essencia: progress perceived: overview (spontaneous)

Open question: "What are, if any, the elements of progress you have perceived?"

Results in continuity with previous years:

Image sector / Visibility in media / Link with schools

More impact on Authorities

Communication / Workshops / Trainings / Seminars (incl webinars)/ Newsletters

(New) initiatives / Working groups with results

Service / Speed / Collaboration with members

More proactivity towards current 'hot topics' and vision for the future / clearer objectives setting

essencia: decline perceived: overview (spontaneous)

Open question: "What are, if any, the elements of decline you have perceived?"

Overall: few answers, only 4% perceive a decline. More 'attention points/challenges/opportunities' than real 'decline':

Sustainability / climate: a key challenge !

**Lack of interest for SME
(focus: Big)**

Others

essenscia: satisfaction on several criteria - 2019

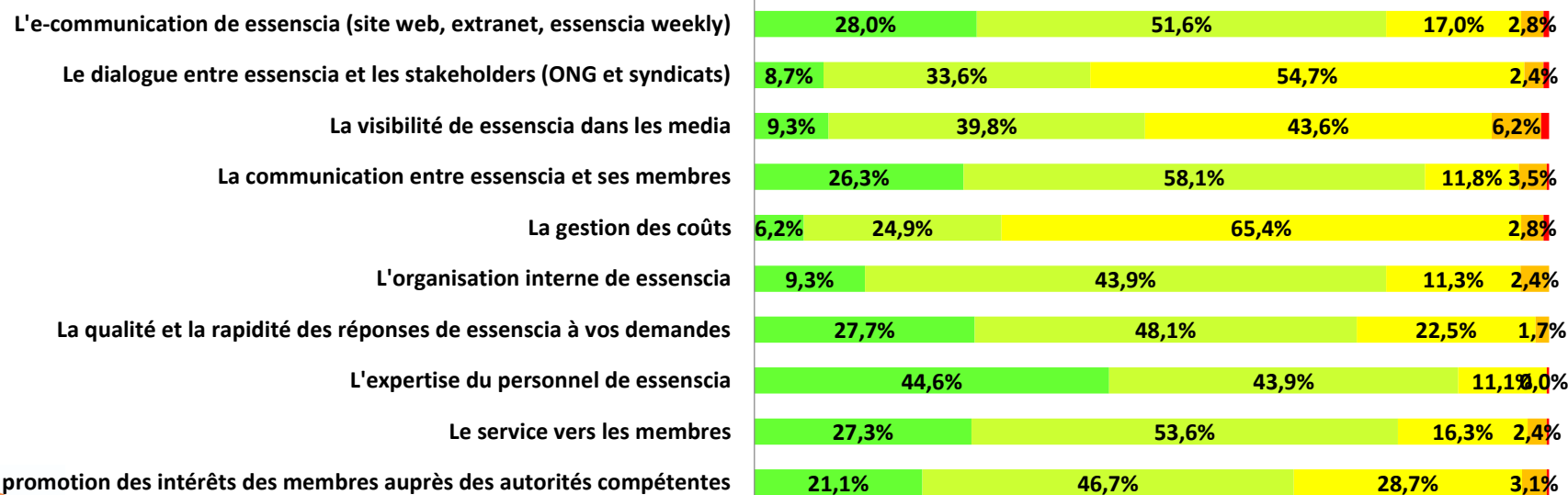
TOP STRENGTHS:

- **1. Expertise of the staff** (89% satisfaction, among which 45% very satisfied)- satisfaction score: 4,3/5
- **2. Service to members + quality/speed of answers to queries** – satisfaction score 4,1/5
- **3. Communication with members & e-communications** – satisfaction score 4,1/5
- **4. The quality and speed of answer to the members** – satisfaction score 4,0/5
- **5. The online communication of essenscia** – satisfaction score 4,0/5

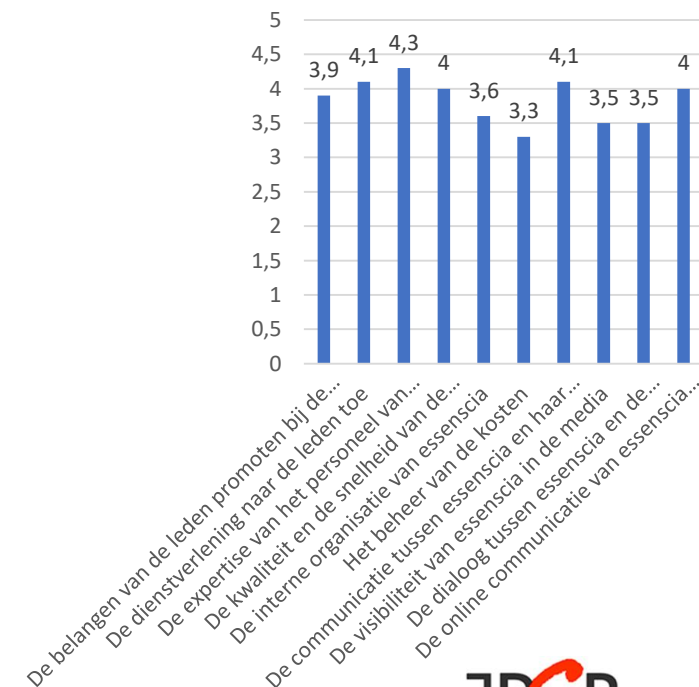
No key dissatisfaction

Satisfaction on several criteria

■ Très satisfait ■ Satisfait ■ Neutre ■ Pas satisfait ■ Pas du tout satisfait



Satisfaction on several criteria: average score /5

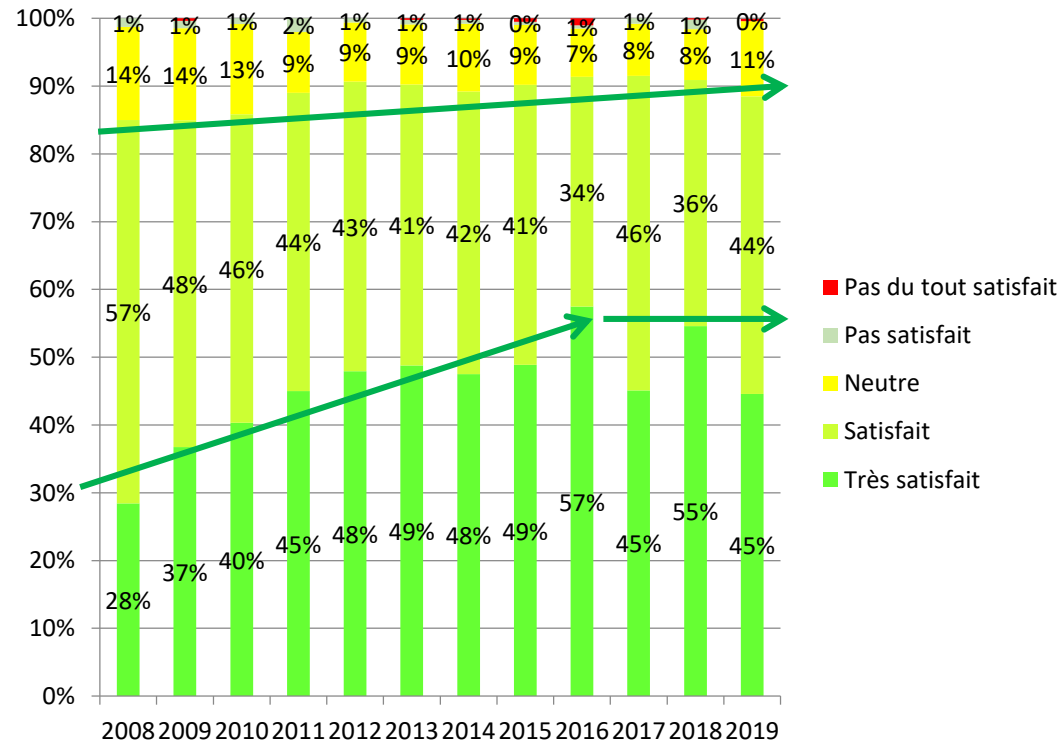


essenscia: satisfaction en several criteria: evolution 2018-2019 (1)

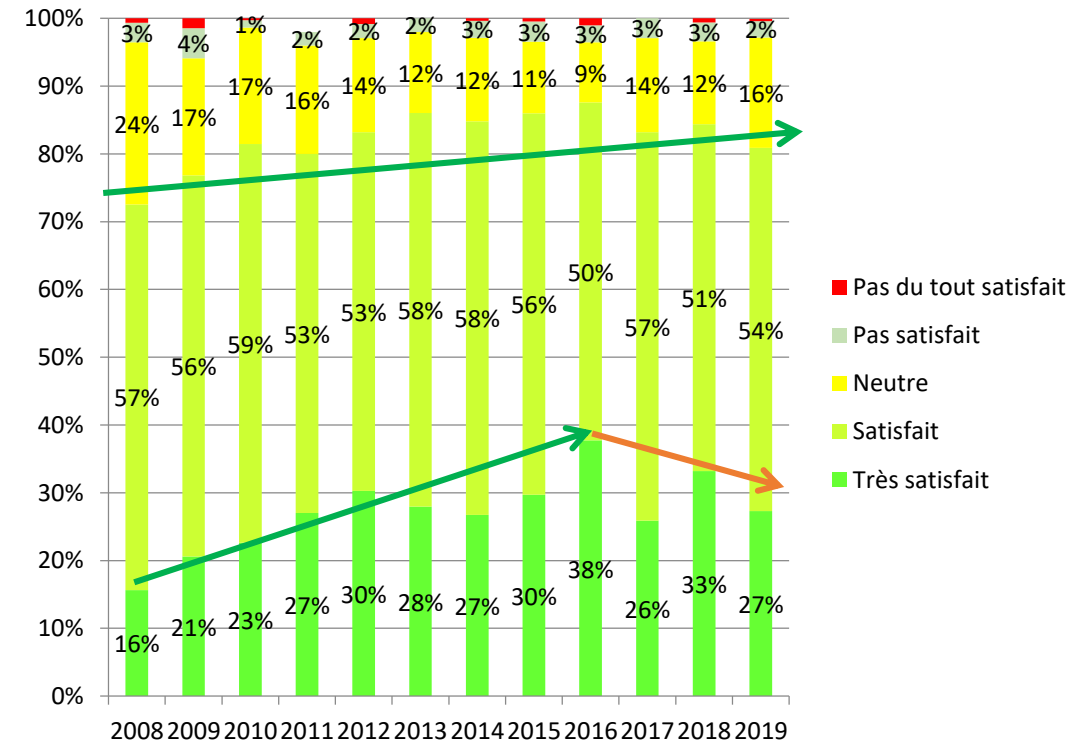
Service level and expertise: positive on long term – high level

- High Expertise: 89% satisfaction - stabilisation the last years
- Good Service level: 81% satisfaction – slight decrease of 'very satisfied' the last years

L'expertise du personnel de essenscia



Le service vers les membres

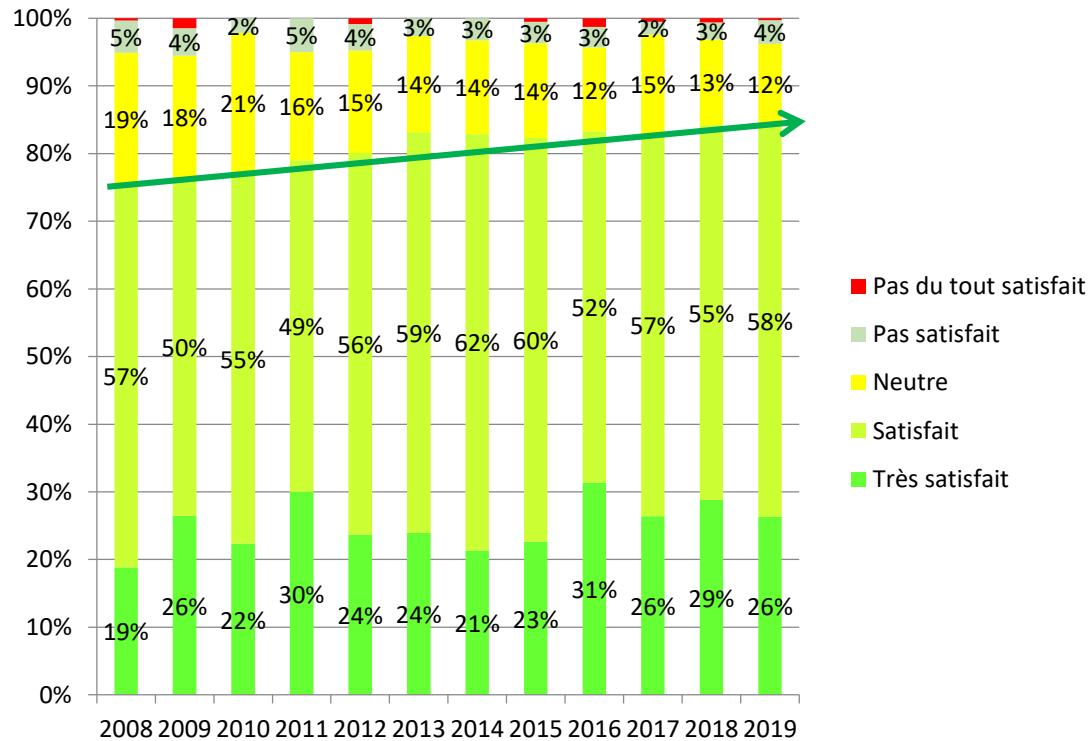


essenscia: satisfaction en several criteria: evolution 2018-2019 (2)

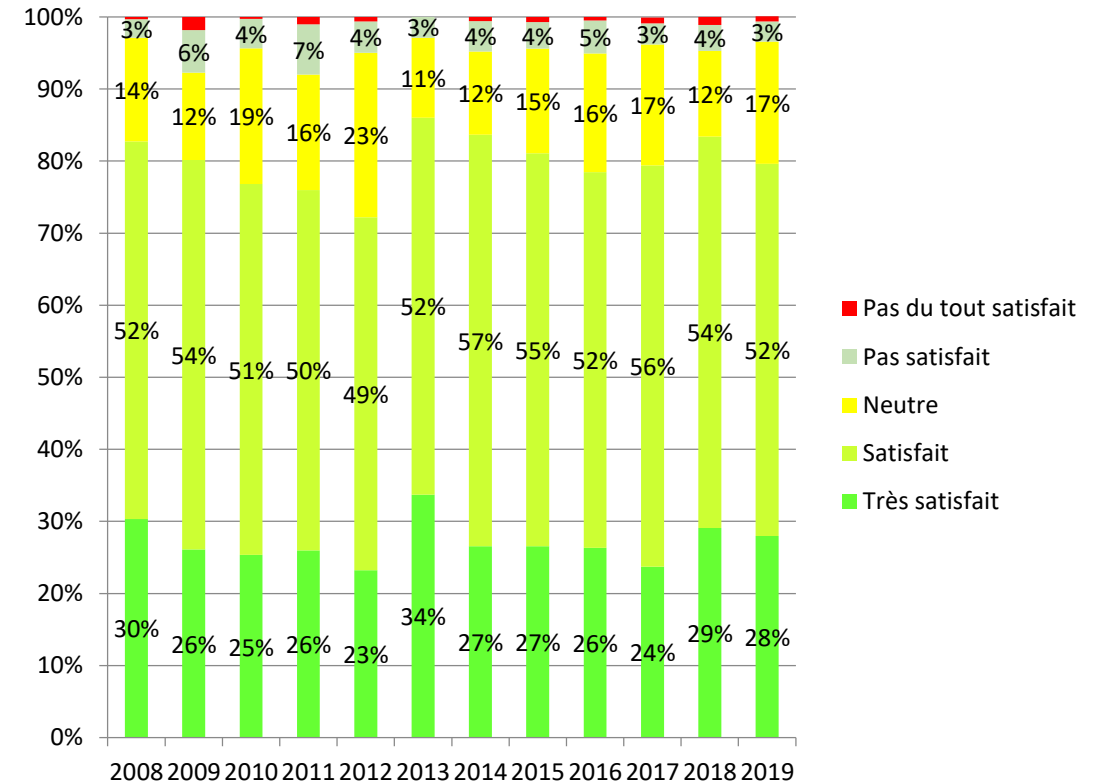
Communication & e-communication: rather high

- Communication: 84% satisfaction – slight progression on long term
- E-communication: 80% satisfaction - rather stable

La communication entre essenscia et ses membres



L'e-communication de essenscia (site web, extranet, essenscia weekly, médias sociaux)

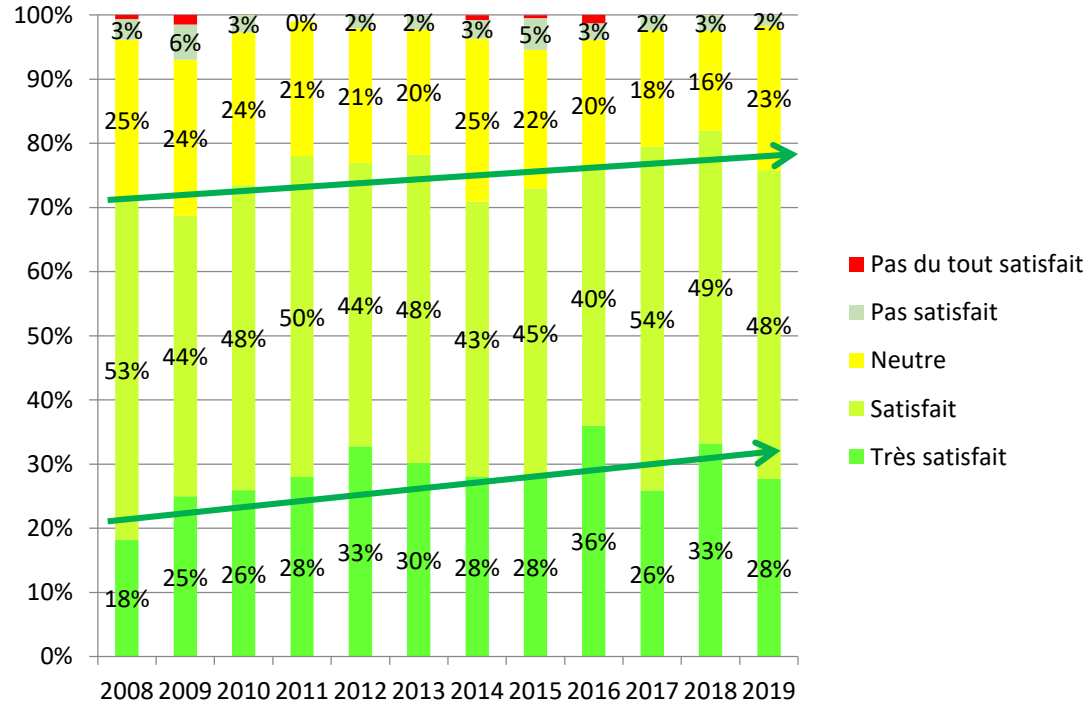


essenscia: satisfaction en several criteria: evolution 2018-2019 (3)

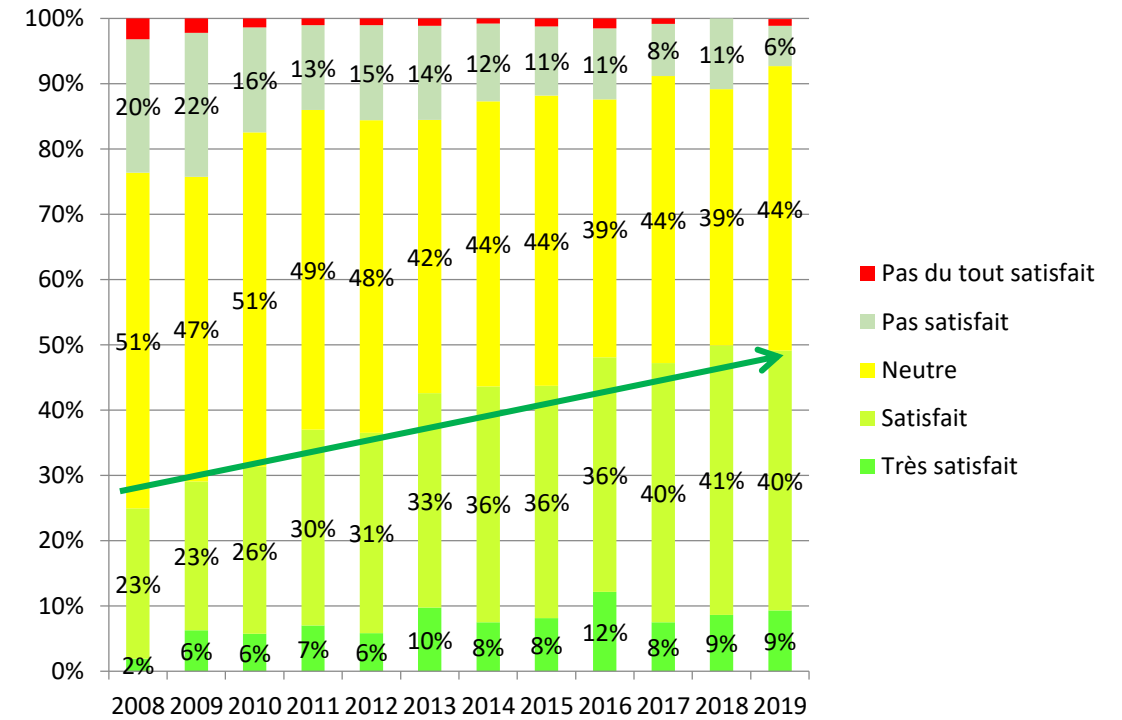
Responsiveness to queries and visibility in media:

- **Quality and speed of essenscia responses to your queries: 76% satisfaction, positive LT evolution (slight decrease of 'very satisfied' the last year)**
- **Visibility in media: 49% satisfaction, positive long term evolution**

La qualité et la rapidité des réponses de essenscia à vos demandes



La visibilité de essenscia dans les media

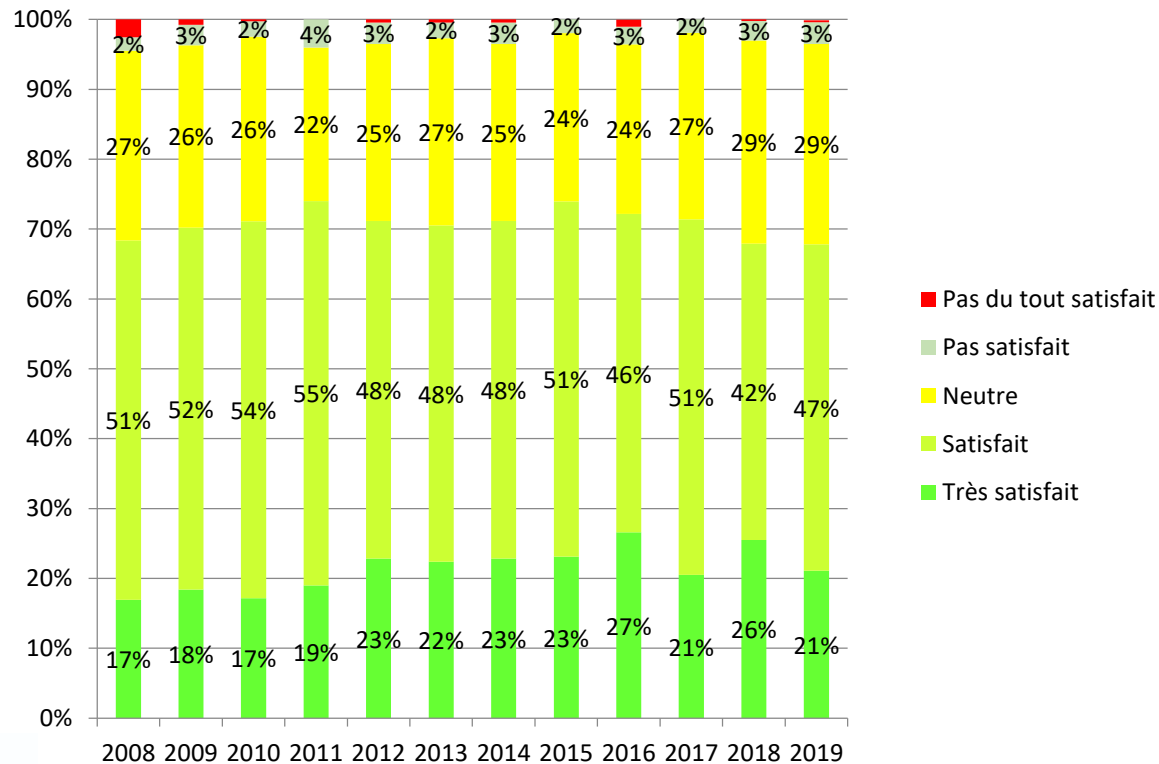


essenscia: satisfaction en several criteria: evolution 2018-2019 (4)

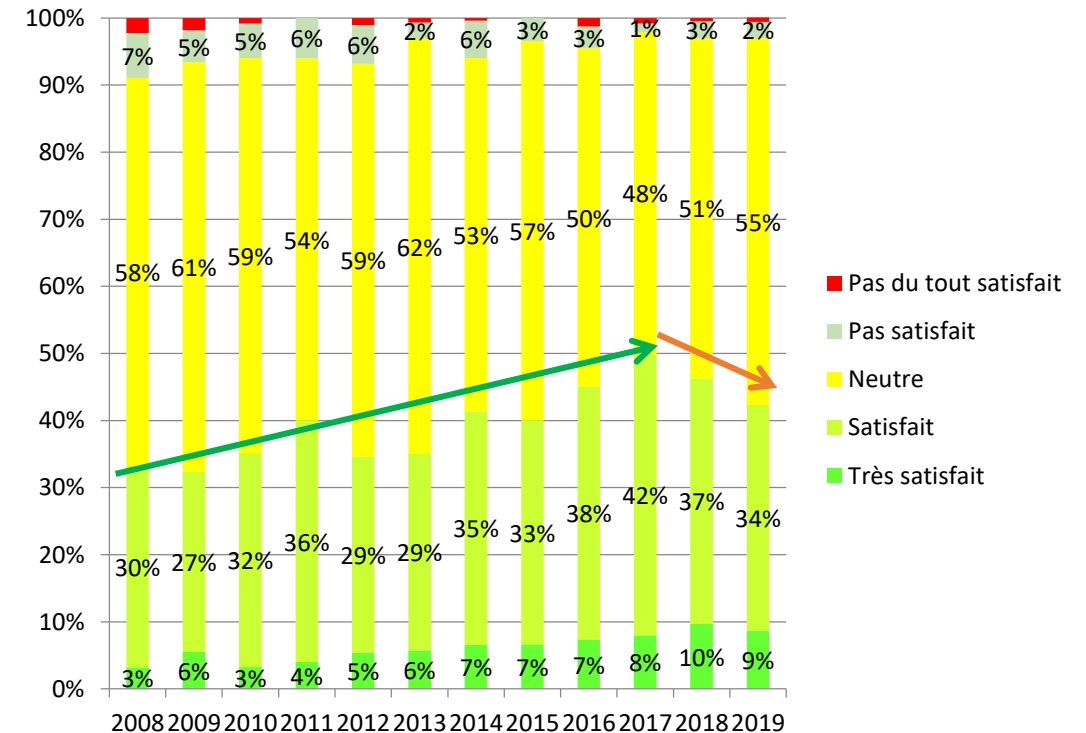
External relationships:

- Promotion of the members interests among the authorities: **67% satisfaction, rather stable**
- Dialogue with stakeholders (ONG and syndicates): **positive long term evolution until 2017, slight decrease the last 2 years – 43% satisfaction in 2019**

La promotion des intérêts des membres auprès des autorités compétentes¹



Le dialogue entre essenscia et les stakeholders (ONG et syndicats)

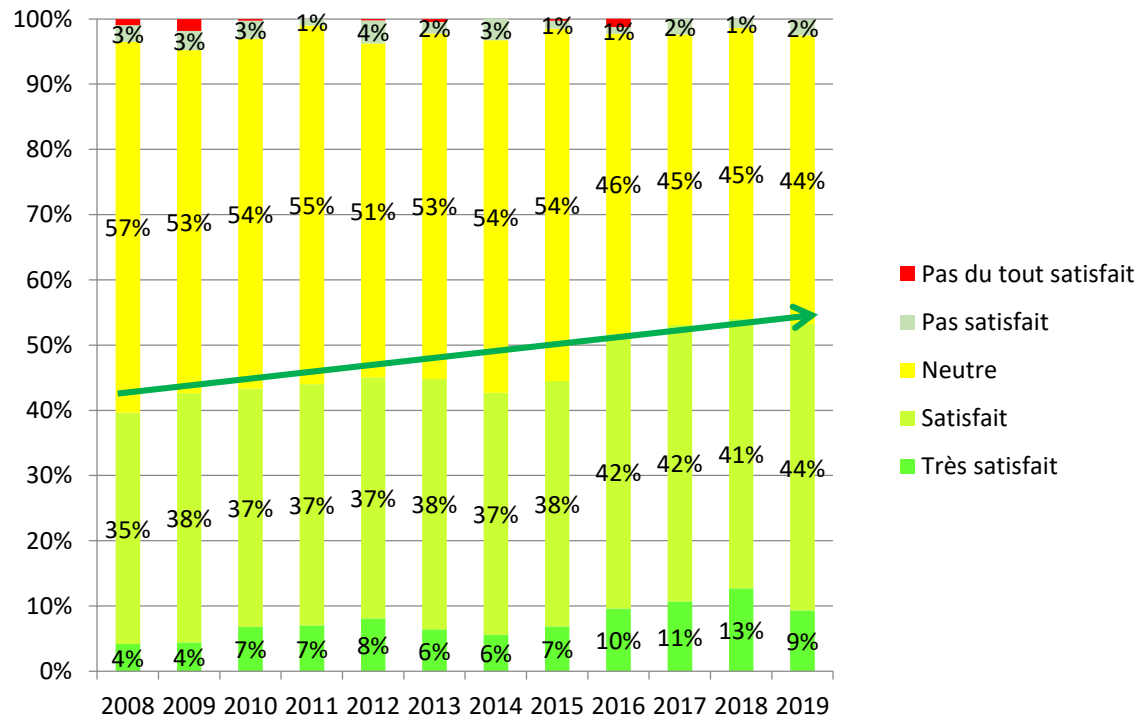


essenscia: satisfaction en several criteria: evolution 2018-2019 (5)

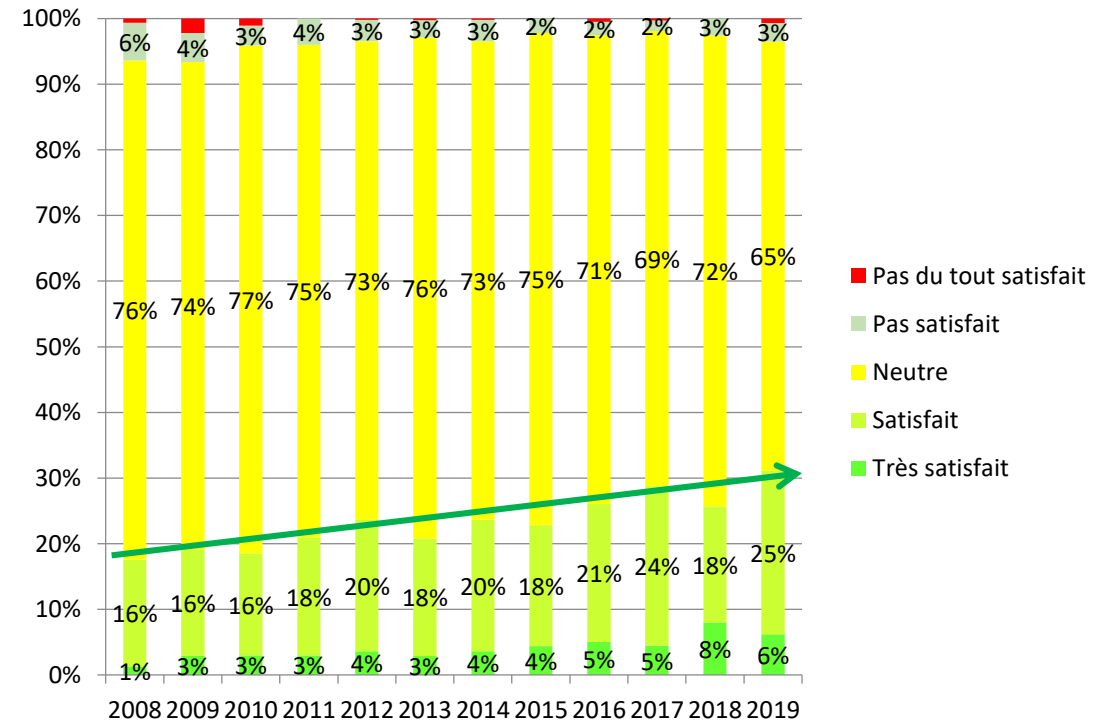
Internal organization and cost management: rather neutral, slightly improving

- Internal organization: 53% satisfaction – positive long term evolution
- Cost management: 31% satisfaction (continuous improvement since 2008) but most (65%) are neutral.

L'organisation interne de essenscia



La gestion des coûts



Essenscia: priorities / most important action pillars

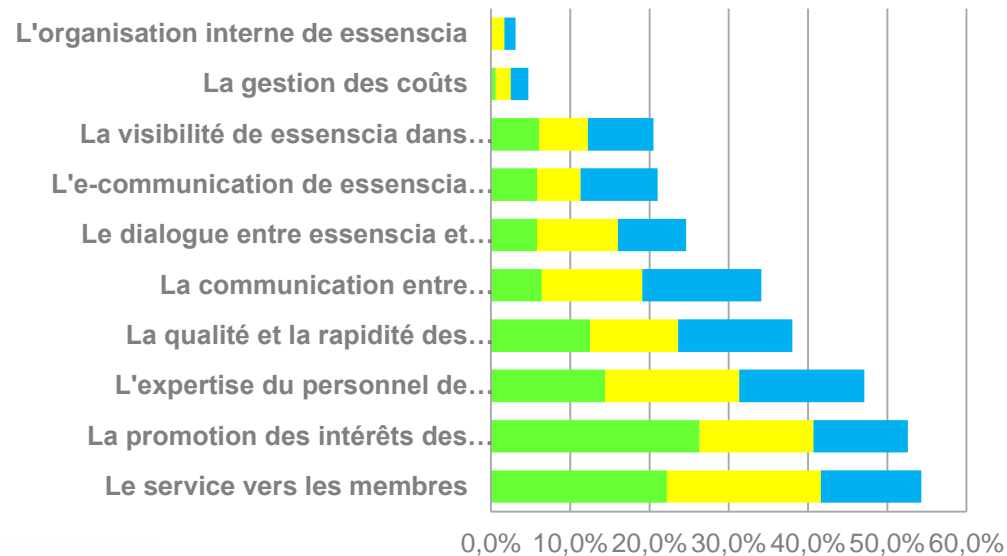
The promotion of members' interests becomes the most important action pillars

Great fit between the strengths of essenscia and the priorities / The TOP action pillar becomes the promotion of members interest:

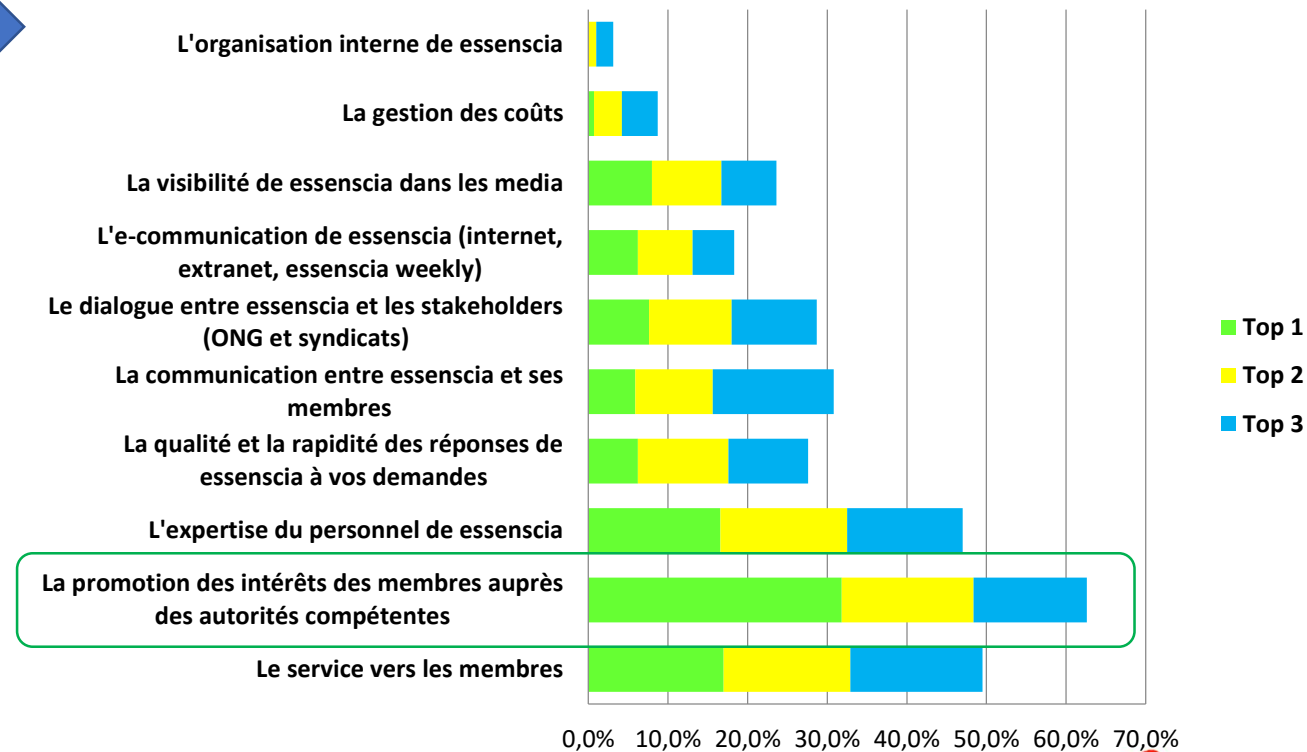
- N°1 : The promotion of members' interests among Authorities
- N°2: The service level towards its members
- N°3 : The expertise of essenscia staff



TOP 3 in 2018



TOP 3 in 2019



essencia: other important action pillars and suggestions: overview (spontaneous)

Open question: "Are there other action pillars that are important for you, and not included on the previous list? If positive, please specify which one(s)."

+ "What are all your ideas, suggestions for improvement, for essencia?"

Results in continuity with previous years:

Promotion image sector/value
chemistry among public
opinion
+ Make it attractive for Youth/
Link with schools

A vision/ more future oriented
/ Sustainability / societal role

Extranet / app / webinars /
'one pagers'

Active collaboration between
members, essencia + Best
practices

Synergies with other
Organizations + European
scope

More interest for SME's



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