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FERTILIZER FEEDS THE WORLD

THE CHEMICAL INDUSTRY AND PUBLIC IMAGE[1]

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Summary:

Recent surveys of public opinion of the chemical industry carried out in Western Europe and the United States of America are examined. These suggest that while the economic importance of the chemical industry is well recognised, the public, especially in the United Kingdom, has a generally unfavourable opinion of the industry. There are indications that this negative opinion is stronger than fifteen years ago, despite what the industry would see as their improving performance. It is apparent that relationships between individual production sites or areas and the local population can be satisfactory, while public perception of other more distant facilities is poor. Public opinion is strongly influenced by personal and local experience, but for non-local sites information from television and from pressure groups is believed considerably more than information from companies or other authorities. It is suspected that, while companies may issue reports of improvements in, for example, environmental performance, this information may include much data but insufficient explanation of the benefits to balance and counteract negative non-scientific information from other sources. Some activities and methods of communicating with the public are identified.

Introduction:

There is or should be concern within an industry for its public image, if for no other reason than that the public includes customers, shareholders and employees. Public opinion can carry considerable political influence, and industry therefore should consider it important to ensure its public image is an accurate one.

Public opinion of an industry is frequently based on an emotional rather than a scientifically logical perception, but in this context we must accept that 'Perception is Reality'. One of the great difficulties for a science-based industry is to alter emotional perceptions, particularly when that industry is used to discussing issues on the basis of scientific logic. This logic may be of little help in altering public opinion in the short term.

Public Attitudes:

United Kingdom:

World-wide, attitude surveys are carried out regularly, most examining public attitudes to the chemical industry as a whole. There is no doubt that attitudes to different sectors within the industry vary, although probably only moderately when considering production facilities. In the UK an annual survey has been carried out by Market & Opinion Research International (MORI) over the last decade on behalf of the Chemical Industries Association (CIA) in which approximately 4000 adults aged 15 or over were interviewed face to face. The most recently published of these studies, entitled The Corporate Image of the Chemical Industry, was conducted in the autumn of 1994.

This survey showed that public opinion divided thus:

- one quarter: favourable to the industry,
- one quarter: unfavourable,
- one half: neutral, reflecting the industry's low, and declining, familiarity.

[1] *Presented by D.C. Thompson at the IFA Technical Committee meeting in Prague, Czech Republic on 3 October 1995*

No other industry was viewed more unfavourably except the nuclear industry, and this unfavourable opinion was particularly strong among people under 35 and among activists. Environmental concern was a dominant reason for this opinion, with 80% believing that chemicals cause serious damage and only 25% considering that the industry is concerned about environmental protection.

Figure 1, taken from the MORI survey, compares familiarity with various industries against favourability towards each. The 'line of best fit' through the data points reflects the general correlation between the two factors: the better known an industry is, the more favourably it tends to be regarded. The chemical industry is not well regarded, and with only 10% of the public feeling that they know 'a fair amount' about it, is in fact less favourably regarded than even this limited familiarity would suggest. Plastics and, especially, pharmaceuticals are better regarded than the chemical industry as a whole; no more than 10% feeling unfavourable towards them.

Figure 2, also from the survey, shows the trends in public favourability and unfavourability towards the chemical industry and indicates that favourability has halved over the last 15 years. This finding should be viewed with concern, since over this period considerable improvements in emission levels, safety standards, environmental concern and plant performance have taken place. It would seem that either the public is unsatisfied with the progress made, or is unaware of the progress or its potential benefits. Moreover, the fact that opinion has not merely remained unchanged but has fallen, would imply that the public has been considerably more influenced by the critics of the industry than its promoters. It is possible that the messages from the latter have not been believed or understood.

Table 1, below, summarises the attitudes expressed by those interviewed for the UK survey, and it is of note that where comparisons can be made these attitudes have changed little since 1988. The most noticable change is that significantly fewer people (27%) agree today that the industry is concerned about the environment, compared with the 40% who agreed with the statement in 1988.

Table 1

Statement	Agree	Neutral	Disagree
The use of chemicals causes serious damage to the environment:	82%	13%	5%
The chemical industry is working hard to develop techniques to solve environmental problems:	45%	35%	20%
The chemical industry is more open and informative than it used to be:	41%	30%	29%
Chemicals improve the quality of life:	37%	34%	29%
The chemical industry is concerned about protecting the environment:	27%	23%	50%
The chemical industry deserves to be trusted:	21%	31%	48%

Thus only 21% believed that the industry was worthy of trust. However there was substantial agreement that the industry is developing techniques to combat pollution and that it is more open than in the past, with over a third acknowledging its contribution to improving the quality of life. Television documentaries and news broadcasts are seen as particularly credible main sources of information about the industry, along with national newspapers. Pressure groups and environmental organisations also have relatively high credibility, and are well ahead of the industry itself.

Western Europe:

The European Chemical Industry Council (CEFIC) instigated a survey - the CEFIC Pan European Image Survey - in 1992 and have repeated it in 1994. Face to face interviews were conducted with at least 1000 adults in 7 countries (8 in 1992, included Norway) namely Belgium, France, Germany, Great Britain, Italy, The Netherlands and Spain, giving a total of 7281 interviews.

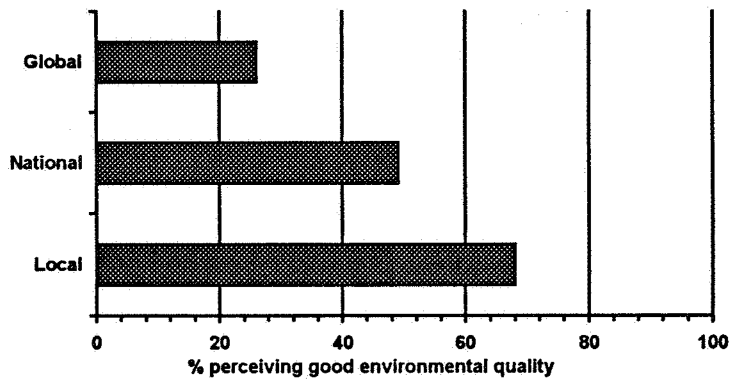
This CEFIC survey comprised three main parts:

- respondents' perception of the quality of the environment,
- their opinion of several industries, to establish the creation of a benchmark for the chemical industry,
- sixteen statements based on concerns, perceptions, credibility and trust.

The survey found that there was generally a positive perception of the industry's economic importance, although all respondents considered that control and regulation was not strict enough. There was considerable variation in the responses between the different countries, suggesting that a pan-European corporate policy on addressing public attitudes may not be appropriate.

Referring to the earlier comment that local influences may be more achievable, it is of note that the majority of all respondents (68%) believed that the quality of the environment in their local community was considerably better than in their country as a whole (49%), and this again was much better than in the world as a whole (26%). This would suggest that positive attitudes to the environment may be acquired by personal experience, whereas environmental concern is conveyed by the media and pressure groups.

Figure 3: Perceived Quality of Environments *(from CEFIC Survey)*



CEFIC concluded from the survey that, overall, the economic importance of the chemical industry is largely recognised, and that the reputation of the industry is perhaps less negative than is generally thought. They also inferred that the industry is seen as a credible source of information, and that the public recognises its progress in environmental and safety matters. However there is a clear opinion that more and tougher regulations and controls are required.

The main conclusions from this 1994 survey were:

- Perception of the chemical industry's economic importance is positive. Statements related to 'economic input and effect of the industry' are well accepted.
- Teacher's ratings of the chemical industry on environmental matters are better than those of the general public, demonstrating better factual knowledge.

- Control and regulation are not strict enough, state all respondents.
- A surprisingly large minority claim to trust the chemical industry.
- Press and TV attacks on the industry are often seen as too tough.
- There is no evidence or proof of 'general public hostility to the chemical industry'.
- Since the last survey (1992), the acceptance of information given by the industry appears to have increased. However, the theory that more information generates more trust is not a proven conclusion.

United States of America:

The Fertilizer Institute (TFI) conducted a series of local focus group meetings in the spring of 1995 on attitudes towards the fertiliser industry, rather than the more general chemical industry. (The focus groups comprised members of the public who were voters and were not connected to newspapers or other information media). These meetings concluded that environmental issues and industrial practices are of much less importance than problems with crime and education. There was a generally positive opinion about local ammonia facilities, with local companies being well regarded, and with the public giving them the benefit of the doubt on their safety procedures. Details provided by local companies about their safety record and procedures will be trusted by the community as objective, believable information.

General conclusions from the Surveys: (note that quantitative comparisons are unsound)

1. The chemical industry is recognised as being necessary, but there appears an underlying wish that it was not so. Perhaps some consider it a 'necessary evil'.

2. The apparent low familiarity with the industry may well be a major reason for the relative suspicion with which its practices and pronouncements are viewed. This unfamiliarity may not, or need not, apply to local facilities, which are more often seen as responsible and careful.

3. The public attitude to local installations is often much more positive than that towards distant or unknown facilities. This is a significant finding, and suggests that public opinion is not strongly negative to the industry *per se*, but that it is susceptible to suggestions of poor practice where it does not have personal knowledge.

4. Several of the findings are in conflict, which suggests that not all the opinions of the industry are held for rational reasons, but that many are emotional or perceived opinions. There are strong indications that the public does not necessarily need to know the science and detail behind the business, but needs to be reassured that the management is competent and responsible, and that all information is available if required.

5. It is clear that good public opinion can be earned at a local level. It is reasonable to suppose that if this good local opinion is generally held, then national and international opinion can be improved by building on this local goodwill and understanding. It would be unlikely that such broadly based more positive opinion could be developed without a sound local base.

6. It is certain that public opinion cannot be influenced unless the individuals who make up 'the public' are aware of the sound practices which the industry employs. However the public does not appear as interested in the techniques and detail, which we may call the features, so much as the benefits which result from this good practice.

7. For the individual company within an industry there are opportunities to influence the opinions of individuals such as those living nearby, customers, employees and local schools. It is more practically feasible to inform and work with identifiable groups and individuals and thereby to affect public opinion, than to attempt to influence opinion generally.

Activities which can influence opinion positively:

These are the activities which, over and above legal requirements, can usefully be carried out to improve not only public perception and relationships, particularly locally, but also to improve internal attitudes and working conditions. As has been inferred from the surveys, it is unlikely to be sufficient just to carry out these activities; the local population must be individually aware and ideally be to some extent involved, and the public at large continually informed.

The activities, or the provision of information, can in the main be divided into those which are best supplied by the industry as a whole, for example by IFA, EFMA, or in the UK for example by the FMA, and those which may best be provided by individual companies or production sites. It has been earlier concluded that both routes must be adopted, and that merely expecting central bodies alone to perform this function is unlikely to prove successful.

Examples of industry-wide initiatives:

EFMA BAT Booklets.
Codes of Practice.
Emergency responses/procedures, e.g. Chemsafe (UK), TUIS (D).
Responsible Care.
Accreditation Schemes:
  Sales representative training, e.g. UK FACTS scheme, US CCA.
  Fertiliser Spreading Quality schemes, e.g. UK SP Rating scheme.
Provision of data and statistics.
Public meetings.
Lobbying.
Targetted quality literature, e.g. for schools, legislators, food industry etc.

Examples of locally targetted initiatives:

Open Days.
Public declarations of emissions.
ISO 9000.
Independent environmental audits (e.g. Hydro Agri).
Environmental assurance (BS 7750, EMAS).
Local environmental liaison committees.
Community actions/involvement.
Schools liaison/adoption.
Relevant sponsorships.

Conclusions:

People appear to have reasonable confidence that precautions are taken against major events, which are in any case relatively rare except for road traffic accidents. It is likely that their concerns are about insidious, unmeasured, unknown effects, and particularly about perceived effects on distant environments.

No battle for 'hearts and minds' is ever really won, and continual reinforcement of positive perceptions is essential to counter continuing negative influences. It is probable that the erosion of the relatively reasonable public perception that existed 15 or so years ago is as much attributable to a lack of positive messages as it is to an increase in negative ones. An impartial opinion of an industry or part of it constitutes a valuable position which should be protected by active promotion.

Such support and influence of public opinion cannot just be the responsibility of trade associations and major companies; all must assist to promote the industry or sector. Individual companies have local opportunities and responsibilities; if all local people understand and are involved, then the public, which is of course comprised of individuals, is personally better informed and less likely to have or be susceptible to a negative viewpoint.

One European manufacturer reports that adverse comment in the local press was widely discredited by the residents themselves, apparently as a result of the company's adoption of an 'open' policy and their efforts over many years to cultivate justifiable trust in the local population.

One thing is certain; if no concerted, continual and all-embracing action is taken, then the public opinion of the chemical industry will remain low and perhaps decline further. We know that there is little justification for such a low opinion, but nobody except ourselves will alter it. If we do not all actively address this issue, we should not be surprised if the public puts further pressure on governments to increase the regulations and controls which the European surveys consistently report people to believe are necessary.

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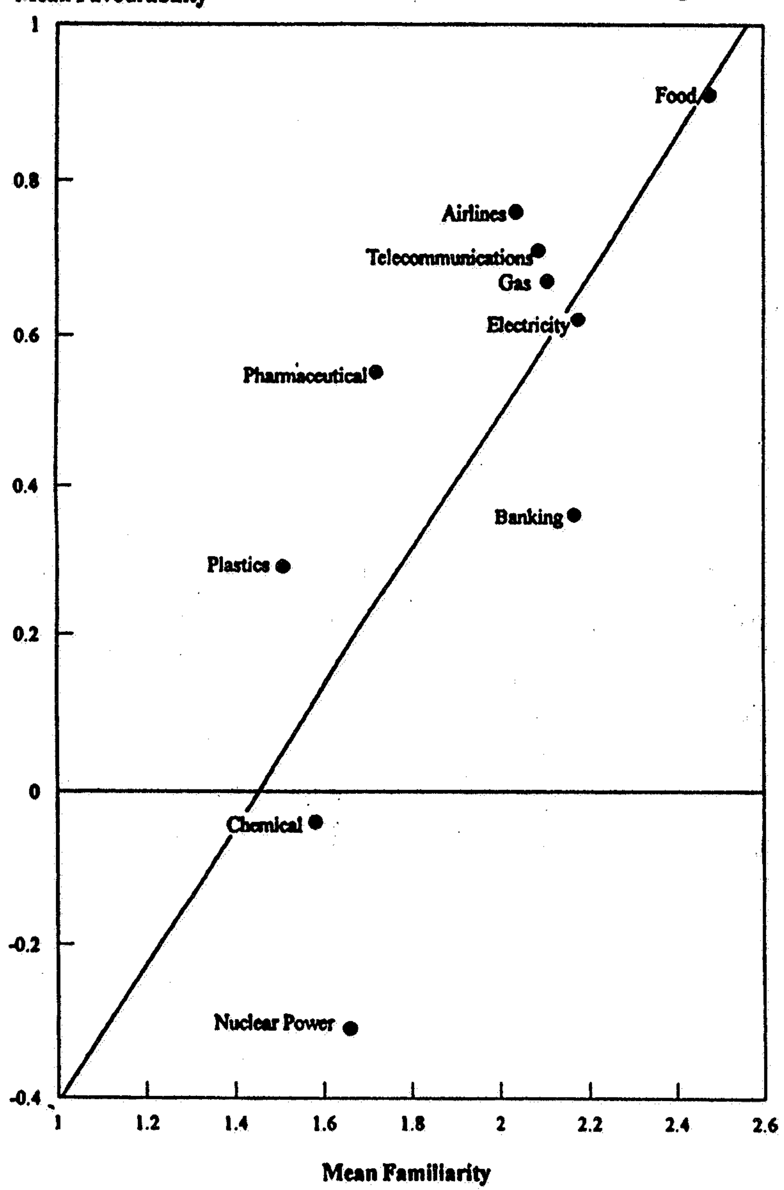
Industry Familiarity and Favourability
General Public Autumn 1994

Figure 1



Favourability to the Chemical Industry
General Public - Trends

Figure 2