

THE CHEMICAL INDUSTRY IN THE PUBLIC EYE: BETWEEN DEVIL'S WORK AND SOLUTIONS

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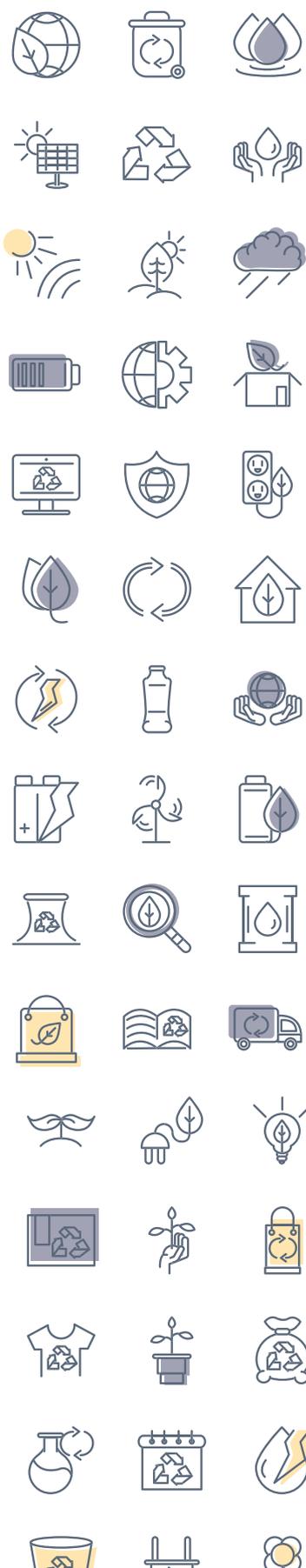
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BETWEEN DEVIL’S WORK AND SOLUTIONS – THE CHEMICAL INDUSTRY IN THE PUBLIC EYE

IMPRINT



FOREWORD



» In 2020, the coronavirus pandemic and its consequences changed the daily lives of millions of people in a way that had not been seen in Germany since the end of the Second World War. In many areas of life, this has made people reorient and reassess their own and general living conditions. At the same time, the pandemic – like any crisis – has reinforced existing attitudes and brought latent lines of conflict to light.

All of this has affected public perception of the chemical-pharmaceutical industry in Germany, prompting the German Chemical Industry Association and the Mining, Chemical and Energy Industrial Union to commission a study. First and foremost, we wanted to know: What makes Germany tick in the crisis? How do people view our industry? In addition, it was important for us to find out how our employees think and feel.

We deliberately chose the Cologne-based rheingold Institute for qualitative market research. The depth-psychological methodology the institute uses goes beyond purely statistical-quantitative surveys, enabling a broader understanding of what actually moves people with regard to the chemical industry. Deeper motives – whether behind radical positions or behind factually present-ed criticism – are also explored.

It has been demonstrated that such efforts to understand can give rise to surprising insights into the often-intricate ways in which judgments and prejudices about the chemical and pharmaceutical industries are formed. If one is willing to explore these paths, one can draw important conclusions for one's own dealings with the various stakeholder groups.

As an industry, we are convinced that we are making many important contributions to solving major challenges of the future, such as climate protection, the circular economy, and research into new vaccines. However, we know that we cannot solve these problems alone. With this study, we therefore also explored the following questions: Which misunderstandings need to be clarified and which divides need to be overcome in order as part of society to enable joint solutions to major issues of the future.

We would like to thank the entire rheingold team as well as the numerous participants in the study, some of whom underwent several hours of intensive questioning to make their image of the chemical and pharmaceutical industry transparent for us. The results are a source of insight and inspiration to break new ground.

With this in mind, we wish you a stimulating read.



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Christian Kullmann

President of the Chemical Industry Association



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Michael Vassiliadis,

Chairman of the Mining, Chemical and Energy Industrial Union

CHAPTER 1

THE STUDY - METHOD AND PROCEDURE

This study aims to provide an orientation framework for the positioning of the chemical-pharmaceutical industry (CI) in Germany after the coronavirus crisis ends. Chapter 2 intends to provide a deeper understanding of the upheavals experienced due to the coronavirus. A particular focus was on which values and attitudes are changing and how, what triggers these changes, and where the changing values can potentially lead.

In the subsequent chapters, we will look at the opportunities and potentials for the CI resulting from the developments described above with a view to the post-coronavirus era. The key question is: How can the CI position itself in order to be perceived more favorably in terms of its relevance and significance against the backdrop of changed values?

The core of the study was the qualitative basic study using rheingold depth interviews (Tiefeninterviews®). The latter are two-hour explorations in which unconscious mental efficacies and factors of influence that determine human behavior are revealed. The interview partners are encouraged to describe in their own words everything that occurs to them in connection with the topic. The interview thus becomes a joint research journey. Nevertheless, it is not a 'free' exploration. Conducting and evaluating the interviews is subject to explicit rules and requires special training.

In this study, 140 two-hour individual psychological explorations were conducted both online and in analog format with the various target groups (see below). In order to create a comprehensive and profound basis of understanding for repositioning, both the study and the evaluation were carried out from the respective perspectives of the various target groups: consumers, CI employees, and union members, as well as journalists and influencers. In addition, the insights gained by the German Chemical Industry Association (VCI) and the trade union IG BCE as part of their "Social Listening" project were included as background information in the preparation of the study.

In a second step, the study makers quantified selected core contents on the basis of a representative sample (n=1,500), whereby the method and survey contents were specifically adapted to the qualitative findings. As a result, many data and facts were obtained to support and quantify the qualitative findings.

Finally, in the third stage of the study, the explorations were condensed in several analysis steps using in-depth psychological analysis methods and tested for strategic relevance. This was followed by the development of strategic and concrete recommendations for strengthening the public image of the CI. The presentation of the results and their implementation took place in workshops prepared and moderated by rheingold.

CHANGING VALUES



CHAPTER 1

DEPTH- PSYCHOLOGICAL INTERVIEWS

The 140 depth- psychological interviews were divided into 100 online interviews conducted nationwide and 40 face-to-face interviews with consumers in Cologne. Equal numbers of women and men were interviewed, with the age of the participants ranging from 16 to 65.

The different target groups were:

1. OPINION LEADERS

10 journalists from the fields of politics, business, and knowledge

10 social media influencers from the fields of society, politics, ecology, and knowledge

2. EMPLOYEES IN THE CI/TRADE UNIONISTS

10 trade unionists (IG BCE)

30 employees in the chemical-pharmaceutical industry

3. CONSUMERS

60 consumers, 20–65 years old, differentiated according to:

- » socioeconomic status (education, income)
- » age, gender, marital status
- » residence city / country
- » residence in the vicinity of the chemical industry (approx. 50 percent)

as well as

20 young consumers aged 16–19 (mix of students and trainees; also differentiated by city / country and proximity to the chemical industry).

In the second step of the study (see above: “quantification”), 1,500 participants were interviewed for 15 to 20 minutes each in the online panel net, i.e. after data cleansing. rheingold’s software was available for this purpose, ensuring that the quality of the surveys could be continuously monitored and flexibly adjusted if necessary. The sample selected can be considered nationally representative of the total population of Germany aged 16 and over. The quotas for education, income, age, gender, and regions are also representative.

The results were evaluated both descriptively-statistically and analytically with a view to all relevant subgroup differentiations (e.g., by age, income, and education).

An additional driver analysis to evaluate different correlations between the public’s perception of the CI and possible factors of influence is optionally possible in order to gain more precise insight into which factors can drive positive or negative perceptions in individual cases.



CHAPTER 2

BETWEEN VULNERABILITY AND EXPECTATION OF PUNISHMENT: WHAT HAS CHANGED DUE TO THE CORONAVIRUS

In recent months, many studies and investigations have been published focusing on the changes in people's basic sensitivities and value orientations in connection with COVID-19. The study presented here is based on extensive surveys and analyses on this topic that were conducted by the rheingold Institute. The main takeaway: the coronavirus pandemic and its effects have had a contradictory, or at least ambivalent, impact on society. On the one hand, people experience the spread of the virus as a confrontation with their own vulnerability. On the other, the "second wave" in particular – as a metaphor also linguistically associated with the Biblical Flood – is unconsciously experienced as divine punishment for an expansive lifestyle. In the interviews, these connections are expressed by statements such as:

» NATURE STRIKES BACK, SETS LIMITS ON PEOPLE BECAUSE THEY OVERDO IT. «

Or:

» I HAVE THE FEELING THIS IS ALSO DUE TO UNHEALTHY LIFESTYLES – FACTORY FARMING, MINDLESS CONSUMPTION, GLOBALIZATION. «

As a consequence, this leads to a desire for "purification." In particular, there is a need to align one's own life and collective life with other values in the future. For example, the respondents want to show more appreciation for "little things," for things that are otherwise taken for granted, and for friends and family. They want to pay more attention to nature and live more sustainably. They want to move away from the principle of "higher, faster, further" and sort out (both in reality and metaphorically) and de-clutter. Foregoing consumption is often experienced as liberating, and values such as regionality or local proximity are emphasized more strongly than before.

Globalization in the sense of dependence on other countries (especially China), e.g. for medicines and medical aids, is also coming under further criticism as a result of the coronavirus crisis.



CHAPTER 2

In sum, there are eleven clear trends in the response to the pandemic:

In the private sphere one can observe:

1. A RETURN TO THE TRIED AND TRUE
2. A RENAISSANCE OF THE “DO IT YOURSELF” LIFESTYLE
3. A QUEST FOR A NEW WORK-LIFE BALANCE
4. A REVISION OF PERSONAL RELATIONSHIPS

In the professional sphere, the focus is on:

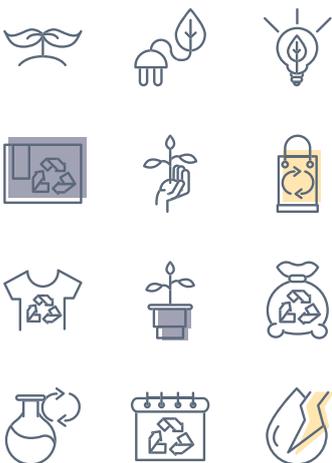
5. THE DIGITIZATION OF BUSINESS
6. THE HOME OFFICE AND THUS EMANCIPATION FROM THE COLLECTIVE
7. THE DESIRE FOR A NEW LEADERSHIP CULTURE IN WHICH “ROLE MODEL” REPLACES “AUTHORITY”

In economic terms, the following are particularly relevant:

8. A REASSESSMENT OF MANY VALUES, ESPECIALLY THE DESIRE FOR A NEW SENSE OF PURPOSE TO REPLACE THE PRINCIPLE OF “HIGHER, FASTER, FURTHER”
9. AN EMPHASIS ON “SUSTAINABILITY” AS A GENERAL HYGIENE FACTOR AND BASIC ORIENTATION FOR AN ENTREPRENEURIAL “PURPOSE,” WHICH IS GAINING IMPORTANCE AS A SPECIAL DIFFERENTIATING FACTOR
10. NEW CONFIDENCE IN CHANGE IN TERMS OF CONVICTION: “WE CAN DO THINGS DIFFERENTLY!” OR “CHANGE IS FEASIBLE”

as well as

11. STRENGTHENING REGIONALITY AND ECONOMIC AUTONOMY.



CHAPTER 2

Apart from the direct and indirect consequences of almost every one of these value shifts for companies in the chemical industry and in other sectors (e.g., new workplace and time models, realigned communications, mission statements that may need to be revised, changed corporate culture, altered products and services, etc.), the change outlined above presents very specific challenges to the chemical and pharmaceutical industry related to the particular perception and valuation of the industry by a wide variety of stakeholders (see the following chapter).

Analogous to the ambivalent effects of the coronavirus pandemic as a whole (“own vulnerability” vs. “divine punishment”), the public’s perception of the CI can also be described as ambivalent. On the one hand, the industry is experienced as a kind of “knight in shining armor” that can save the day because its products are potentially able to alleviate the widespread feeling of vulnerability – an aspect that applies especially to pharmaceutical chemistry, which is countering the pandemic threat with vaccines and medicines. But products and measures that “save” people are also expected from the CI with regard to climate change and environmental destruction. Thus, overall, the respondents are receptive to CI messages that promise rescue, safety, and protection.

On the other hand, the CI is experienced as a “purification substitute.” This means that respondents unconsciously expect the CI to bring about the desired and / or longed-for changes in values and behavior in their stead and on their behalf. In other words, when the CI ensures sustainability and environmental protection, consumers feel relieved. The industry is particularly welcomed when it takes responsibility. For example, the sentence “In climate protection, the chemical industry is both a polluter and a solution provider” was given a conspicuously high rating.

At the same time, it became clear that the respondents would like to see further progress on the way to a redemption strategy and expect a change in thinking that – analogous to their own change in values – will lead away from the principle of “higher, faster, further” and toward more sustainability, considerateness, and reflection on what is really important.

In order to understand how such inner expectations are constituted, it is necessary to get to know and analyze the preceding inner images, which are independent of the coronavirus issue, associated with the CI. Accordingly, this was the focus of the study.

CAUSER AND
SOLUTION
PROVIDER



CHAPTER 3

BETWEEN PURIFICATION AND REDEMPTION - THE CHEMICAL-PHARMACEUTICAL INDUSTRY'S TWO FACES IN THE EXPERIENCE OF CONSUMERS AND CUSTOMERS

A preliminary remark on terminology: In the context of this study, the term “chemical industry” (CI) refers to both the actual chemical industry and the pharmaceutical industry, although significant differences in the perception of the two groups were often observed in the interviews. For example, chemicals and pharmaceuticals were often viewed as separate industries, each with distinct characteristics. While pharma is more tangible and present than chemistry in the eyes of many, chemistry is often perceived as more dangerous and environmentally harmful. In other cases, pharma is understood as a subdivision of the chemical industry, and some respondents considered the pharmaceutical industry (initially) to be larger than the chemical industry.

That both sectors are nevertheless dealt with together as CIs here is justified by the fact that the respondents predominantly identify common basic principles in their overall dealings with chemicals and pharmaceuticals.

An initial conclusion based on the interviews prior to the detailed analysis was the insight that a closed, uniform image of the CI does not exist. Rather, the interviews were characterized by a dynamic course with frequent changes between pro and con images. This is illustrated by general characterizations of the CI such as:

» A LOT OF GOOD AND A LOT OF HARM... CHEMISTRY CAN GIVE LIFE AND IT CAN KILL.
I THINK OF CHEMICAL ACCIDENTS, BUT ALSO MY HAIR COLOR. CHEMISTRY IS INCALCULABLE. «

Or

» THE PHARMACEUTICAL INDUSTRY IS CONTROVERSIAL. FOR THEM, IT'S MORE WORTHWHILE TO KEEP A DISEASE THAN TO STOP IT. I WELCOME SMALL BREAKTHROUGHS OF COURSE. A VACCINE AGAINST THE CORONAVIRUS WOULD BE GREAT. «

The interviews ranged from ignorance (“*I can't think of anything to say about that*”), to negative cases, to positive ideas (“*we need chemistry*”) and ubiquity (“*everything is chemistry*”). Some respondents vacillated during the interview or continuously weighed pros and cons.

The positive perceptions were characterized by images of a “solutions industry” and an “elementary necessity of life.” In the context of negative evaluations, many referred to the CI as being “abstract and incomprehensible” or “devil's work.”

Indeed, the further course of the interviews and the analysis of the conversations showed that people's perception of the CI moves in a paradoxical field of tension determined by these four central aspects of meaning:

- 1) ABSTRACT INCOMPREHENSIBILITY
- 2) DEVIL'S WORK
- 3) SOLUTIONS INDUSTRY
- 4) ELEMENTARY NECESSITY OF LIFE



CHAPTER 3

The first aspect – abstract incomprehensibility – often shapes people’s first spontaneous assessment of the CI. To them, it is largely unfathomable. This is less true of the pharmaceutical industry, with its comparatively “visible” products, than of CI proper, but in terms of concrete comprehensibility and tangibility, both rank well behind the automotive industry, which is the leader in this respect.

Many consumers, for example, conjure up images of deserted factories with huge plants, tanks, pipes, and chimneys; inaccessible, hidden behind “high walls,” where one does not know what is produced there. Therefore, the respondents almost always speculate that almost no people work there. In addition, the idea that a dubious deal might be involved is also expressed frequently in the conversations:

» THE CI DOESN'T TELL US ANYTHING, AND CONSUMERS DON'T ASK. «

or

» THEY OPERATE IN STEALTH MODE AS IF UNDER A CLOAK OF INVISIBILITY. «

This is bolstered by experiences from their own life: Even in chemistry lessons, most of the respondents did not really understand the formulaic world of chemistry. Students who were good at chemistry were regarded as “nerds” who were not very socially integrated and lived “in their own world.” Accordingly, the CI is often perceived as a phenomenon that is outside of their everyday lives and alien.

This aspect is reflected by statements like:

» A FRIEND OF MINE WORKS AS A CHEMICAL TECHNICIAN. HE ONCE TRIED TO EXPLAIN TO ME WHAT HE WAS DOING. I DIDN'T UNDERSTAND. «

Or:

» THE CHEMICAL INDUSTRY? HMM, I CAN'T THINK OF ANYTHING. «

Only in a second understanding is this incomprehensibility as the most prominent feature overlaid by another assessment: the rather destructive idea of CI as devil’s work. Smoking chimneys, gigantic and sinister-looking industrial complexes, images of smog and yellow snow determine perception and make CI a potentially dangerous or even destructive industry in the eyes of the respondents.

They think of warning signs such as a “skull and crossbones.” There are associations such as chemistry can destroy all life, whereby concrete accidents or incidents are usually no longer remembered, but only that “something happened often in the past.” The keywords “Monsanto” and “glyphosate” serve as current evidence for incidents in this category. The role of IG Farben in the context of National Socialism was also mentioned comparatively frequently.



CHAPTER 3

Overall, these perceptions give rise to a rather diffuse sense of threat. Despite the acknowledged high safety standards in Germany, the CI is still associated with residual risk classified as dangerous in consumers' perception. Chemistry itself seems "somehow" dangerous, harmful, threatening, sinister, and potentially uncontrollable.

Added to this is the view that there is a lack of a moral compass in the CI. Instead, there is "unscrupulousness" and / or "greed for profit" or something that endangers or damages human health and the environment.

Characteristic of this position are statements such as:

»» THEY'RE NOT INTERESTED IN HEALING, THEY WANT TO KEEP DISEASES CHRONIC SO THEY CAN EARN MONEY OFF OF THEM. ««

Or:

»» THE SOIL IS INFERTILE, EVERYTHING IS GRAY AND ARTIFICIAL, PEOPLE VEGETATE. AIR, COLOR, AND LIFE ARE LACKING. ««

In an extension of the "devil's work" perception, the CI is also experienced as an "evil seducer" that makes life pleasant and comfortable, but for which the "small consumer" has to accept "downsides" and "side effects."

Depending on one's attitude toward the CI, this form of interaction is seen as a "pact with the devil" or a "deal." Consumers get a nice, comfortable life but concede a "gray area" to the CI in return: People suspect or complain about environmental sins, dangerous additives in food, cancer caused by pesticides, etc., but their supposed knowledge or suspicions are neither subjected to a more detailed analysis nor even actively fought against.

Typical of this kind of perceptual orientation are sentences like:

»» I'M A REALIST. I KNOW THAT THE CI IS NOT COMPLETELY CLEAN, BUT ULTIMATELY OUR PROSPERITY IS BASED ON IT. ««

Or:

»» I THINK THEY BLOCK THE FACT THAT CANCER IS CURABLE. THEY EARN TOO MUCH FROM CHEMOTHERAPY. ««

Only in a third understanding does the image of the CI change. People recognize that the CI is an important solutions industry that creates jobs as an innovation driver and is a welcome rescuer in times of need, especially in the current coronavirus crisis.

»» WITHOUT THE CI, WE'D STILL BE LIVING IN THE MIDDLE AGES AND WOULD HAVE NEITHER DISINFECTANTS NOR VACCINES TODAY. ««

Or:

»» THE CI IS LIKE AN INQUISITIVE TINKERER WHO IS KNOWLEDGEABLE ABOUT COMPLICATED THINGS. INVENTIVE, COURAGEOUS, TRIES THINGS OUT. ««



CHAPTER 3



The result, according to this aspect of perception, is that something new is created in this way – innovations that are thoroughly believed to be able to help humankind solve and overcome the pressing problems of the day – climate change, for example, as well as the current threat posed by the pandemic. The chemical and pharmaceutical industries are ranked second and third in a list of industries with the highest problem-solving potential – behind the electronics and telecommunications industries.

However, this assessment is also subject to reservations. More than 80 percent of those surveyed believe that the CI only taps its problem-solving potential to the extent that it can generate sufficiently large profits. By contrast, only around a third of the respondents agree with the statement “The CI will master the problems of the future (e.g. climate change, environmental pollution, world food supply, diseases) actively and on its own initiative.”

At the same time, there is another psychological problem that arises in conjunction with the inherently positive perception of CI as a solutions industry in terms of its positioning. The problem’s paradoxical structure is characteristic and of central importance for the development of an effective positioning strategy.

Because the bigger and more significant an industry’s solutions are for the consumer’s own existence, the smaller and more incapable the consumer feels. The CI shares this fate with other Industries that are “protective powers” such as insurance companies and utilities. Like them, the CI almost inevitably makes people feel offended. Because in view of the perceived size, importance, and, above all, indispensability of CI, people feel small and incapable. Statements like:

» TODAY, THANKS TO PHARMA, YOU CAN LIVE WITH HIV. IN THE PAST, IT WAS A DEATH SENTENCE. «

illustrate that, behind the initially purely positive-sounding assessment, the often vitally important solutions of the CI make consumers realize that, despite all their personal autonomy or emancipation, they are dependent on the support of such a protective power.

Important for an understanding of the psychological framework within which any positioning of the CI operates, therefore, is the realization that this offending aspect elicits defensiveness and repression. The chemical industry is literally blocked out and made invisible – a “psychological measure” facilitated by chemistry’s objective of being “invisible.”

This paradox – acceptance of the competence to find solutions simultaneously causes emotional distress – takes shape even more in a fourth understanding of consumers of the CI. They realize that the CI is not only an industry that solves individual problems, but an elementary necessity that impacts all of life. This realization is reflected by statements such as:

» OH GOD, WE’RE REALLY ONLY SURROUNDED BY CHEMICALS. «

Or:

» WITHOUT CHEMISTRY THERE WOULD BE NO LIGHT BULBS AND REFRIGERATORS, NO ELECTRIC CARS AND WIND TURBINES, AND CERTAINLY NO TELEVISIONS OR SMARTPHONES. «

CHAPTER 3

This even more comprehensive significance of chemistry as an elementary necessity of life reinforces the hurt feelings described. People feel a general dependence that goes beyond this. It becomes clear that they do not want to and cannot do without the achievements of chemistry. But this fact – and this ties in with another important psychological motive – also makes them feel guilty. They feel partly responsible for negative developments (climate change, environmental pollution) that they attribute to chemistry, and realize they can be corrupted by its “seductive products and services.”

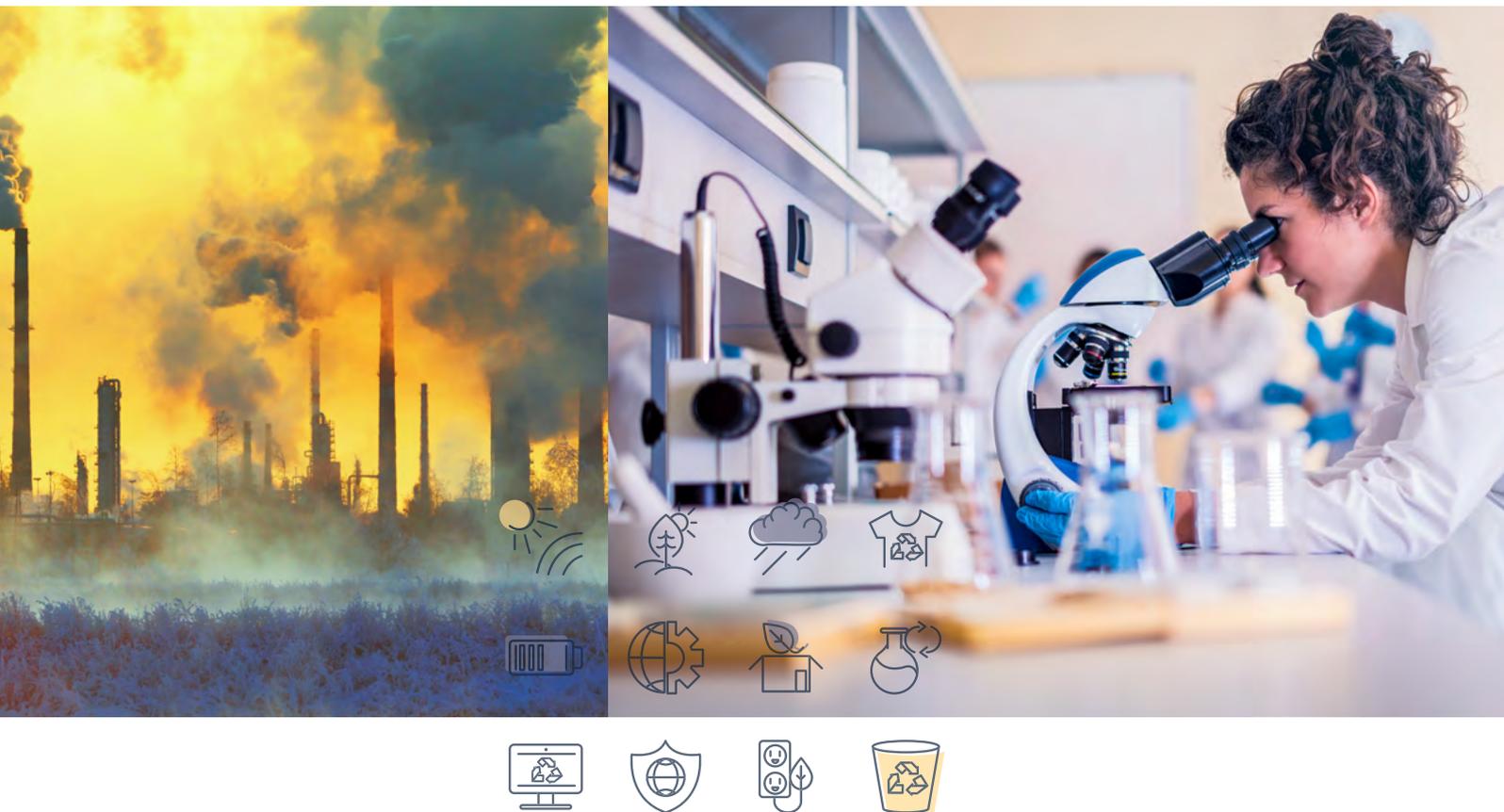
Such feelings of inferiority, dependence, and (co-)guilt are difficult to bear for most consumers. To relieve themselves, they either try to suppress the issue by making CI abstract and incomprehensible or by assigning blame to CI and branding it as devil’s work. Ultimately, they are better able to deal with the negative aspects – “abstract incomprehensibility” and “devil’s work” – than with the positive aspects “solutions industry” and “elementary necessity of life.”

Any CI positioning work is confronted with this paradox: The bigger and more important the CI makes itself out to be as a problem solver and a bringer of progress, the smaller and more incapable consumers feel. And the more CI emphasizes its elementary relevance for everyday life (“CI is in everything”), the more consumers feel dependent and guilty. The psychological reaction is to shift the blame onto the CI itself, which then becomes a scapegoat enabling people to consume without having (constant) guilt feelings.

The strategic challenge for CI is therefore to embrace its great importance, its innovative power, and its increasingly important role as a problem solver without triggering feelings of dependency, smallness, or incapability among people.

ELEMENTARY
NECESSITY OF LIFE

PARADOX



CHAPTER 4

THE CHEMISTRY IS NOT RIGHT - PERCEPTIONS OF THE CHEMICAL-PHARMACEUTICAL INDUSTRY IN TRADITIONAL AND NEW MEDIA

In addition to the group of consumers, the study also examined the perception of the CI by journalists and influencers, as their understanding is of great importance due to the public multiplier effect. In this context, however, it is important to differentiate psychologically between the two groups beforehand, since they follow different logics of their own and, as a result, react in different ways to the peculiarities of the CI. For a successful positioning strategy for the CI, one should be aware of these differences and take them into account.

With regard to journalists, it is important to note that they see themselves (and in many cases are also seen by others) as the “fourth power in the state.” In this respect, they act from a position of power as social enlighteners and investigators. From a psychological point of view, this means that they cultivate a form of self-aggrandizement: they can appropriate all areas of reality and thus actively help shape this very reality.

At the same time, however – and this characterizes the psychological tension in the profession – they experience themselves as always being in second place, because they always report about something that has already happened. The main protagonists are usually the events or the respective actors about whom the journalists report and not themselves. The journalistic view of the world always refers to others. Its guiding question is: What is happening outside of me?

The psychological image of influencers is different. They are fragmented and temporary guiding figures who exert a strong influence on their followers and the latter’s development. From the perspective of their mostly young followers, their psychological function is to bridge the gap between dreamlike fantasies of greatness and paralyzing fears of failing. Followers create a patchwork of fragmented hero figures, each of whom is relevant and competent in certain areas of everyday life. In turn, they present themselves as humane and approachable masters of selected fields and in doing so share weaknesses and mistakes with their followers. They give their followers orientation and support in everyday life and act as helpers, coaches, or knowledge brokers.

Nevertheless, in contrast to the traditional media, their view is primarily self-referential. Influencers create a career out of themselves and draw on their own interests. They are at once a mouthpiece and an object.

The four aspects of perception described in chapter 3 are found among them in a similar way to the consumers surveyed. However, their self-referentiality is clearly expressed. The CI only arouses their interest if it fits into their own logic, i.e., if the CI can be related to their own topics and thus also becomes interesting for their followers.

ALWAYS REFERS
TO OTHERS

MOUTHPIECE
AND OBJECT



CHAPTER 4

The following statements are characteristic:

» I WOULDN'T KNOW WHAT TO SAY ABOUT THEM EITHER...
MY FOLLOWERS WOULD DEFINITELY NOT FIND THAT EXCITING. «

Or:

» I CAN'T THINK OF ANY PRODUCTS RIGHT NOW – THERE'S NOTHING TANGIBLE. «

Or:

» HMM... NOTHING MUCH COMES TO MIND ABOUT THE CI AT FIRST,
I'VE NEVER DEALT WITH IT BEFORE. «

The four aspects of perception from the consumer survey are also found among journalists, although profession- and relationship-specific forms can be observed. The “abstract incomprehensibility” aspect, for example, is expressed in the fact that they are confronted with “firmly closed gates.” They miss authentic insights into the CI, which they have the impression is entrenched in the ivory tower and operates from an elevated position. Unlike other industries, the CI does not approach the media of its own accord in journalists’ experience. And when it does, there is no communication on an equal basis, but rather a frontal bombardment. At press conferences, in particular, they are “fobbed off” with prefabricated and euphemistic statements. The closed gates provoke the question of what the CI wants to hide from the world.

Typical statements in this context are:

» NOBODY KNOWS WHAT HAPPENS AT THEIR PLANTS. «

Or:

» AT THE PRESS CONFERENCES, YOU'RE FOBBED OFF WITH PREFABRICATED
STATEMENTS. THEY DON'T WANT TO FACE CRITICAL QUESTIONS. «

The aspects of “devil’s work” and “solutions industry” are also found in the journalists’ perception. They say that the CI (as a producer of “devil’s work”) seems to feel “chronically misunderstood,” expects what it considers to be unjustified criticism at any time and is thus in a sort of permanent, preventive defense mode. The CI’s aim is to prove that they are actually “the good guys.” The result, however, is an image of themselves that is often exaggeratedly positive, in which the CI is portrayed as the savior of the entire world (“solutions industry”).

Journalists are critical, saying that this image downplays the risks and side effects of the CI, which in turn makes them suspicious and provokes the question of where the “catch” is. The bottom line is that the CI is perceived as a “self-impeding unknown.” Not much is known about it, but the information it circulates about itself does not enhance its image.



CHAPTER 4

This view is evident in assessments such as:

» I HAVE HAD MYSELF REMOVED FROM PRESS MAILING LISTS.
I DON'T NEED THIS SELF-ADULATION. «

The fourth aspect of perception – “elementary necessity of life” – as well as the hurt feelings that accompany it are also found among journalists. As a professional group that wants to “get to the bottom of things,” they de facto have to realize that they tend to “run aground” when it comes to the CI. In other words, the CI is too comprehensive and complex to be investigated using their journalistic methods. Memories of their own school traumas come to mind: Even back then, they didn’t understand chemistry as an elementary component of life.

What’s more, the hermetic secrecy of the elementary science of chemistry is made even more inaccessible by the fact that the CI does not try to make itself comprehensible to journalists. From the media’s point of view, the CI prefers to explain the world as it pleases: in a way that is comprehensible only to experts. In its communication, it neglects the “laypeople,” who should be introduced to CI in a simpler way, but instead are offended even more.

Assessments typifying this experience include:

» CHEMISTRY IS NOT AN EASY FIELD... I NEVER UNDERSTOOD IT IN SCHOOL
AND NO ONE COULD EXPLAIN IT TO ME. «

Or:

» THE CI HIDES BEHIND FORMULAS AND TECHNICAL TERMS. APPARENTLY NO ONE IS SUPPOSED
TO UNDERSTAND THEM EITHER... «

As a result, the traditional media have developed three typical ways of dealing with the CI, depending on which aspect(s) of perception is dominant in each case:

TYPE I Open criticism. This involves branding the CI as “devil’s work” in their own perception and / or reporting.

TYPE II Defensive reactions after feeling offended: Journalists say they are not interested in reporting on or dealing with the CI (“I don’t want to report on them anyway”).

TYPE III This includes journalists whose ambition is aroused by the CI: They never give up and try to uncover the “secrets” of the CI via detours – for example, through acquaintances, coworkers, or trade unionists.



CHAPTER 5

COMMITMENT THROUGH A COME-ALONG MENTALITY - CONCLUSIONS AND RECOMMENDATIONS FOR THE STRATEGIC POSITIONING OF THE CHEMICAL-PHARMACEUTICAL INDUSTRY

The strategic challenge for the CI is to embrace its great importance, its innovative power, and its increasingly important role as a problem solver without triggering feelings of dependency, smallness, or incapability in people.

The CI can succeed in this by not primarily proclaiming its size and power, but by driving social commitment. This should be done in the sense of a productive “come-along” mentality which can be created by the CI primarily through exchange and the involvement of all relevant social groups, from the IG BCE to politicians and NGOs. In doing so, those responsible can orient themselves to ten guiding ideas.

1. FROM A PROTECTIVE POWER TO A (PERSONAL) GROWTH PROMOTER

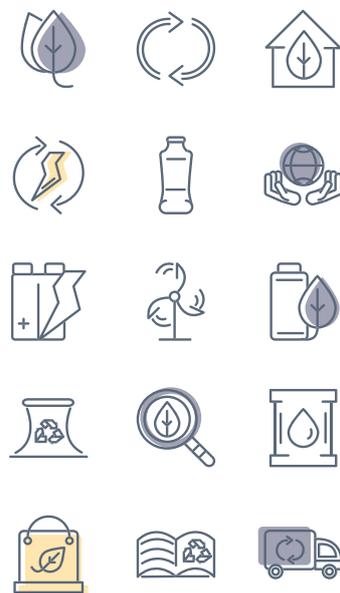
Bold proclamations of one’s own competence in finding solutions are often perceived as a demonstration of power rather than encouragement, regardless of their validity. It is therefore advisable to emphasize more clearly that the CI researches and works for the benefit of the individual and society. Its actions are in the service of society. In the process, however, it not only drives economic growth or increases the general level of wealth, but also acts as a growth engine for each individual. Everyday products such as shopping bags made of regenerative plastic or fuel additives that reduce emissions of soot particles enable people to make their own contributions to greater environmental or climate protection and to become more active or “better” at it.

2. CHANGE OF TONALITY: PROUD MODESTY AND SOVEREIGN SELF-RELATIVIZATION

Sometimes less is more – this guiding principle should also apply in the choice of the overall tonality that determines the CI’s IMAGE. The supposedly “self-confident” stringing together of CI successes along the lines of “10 million liters of disinfectant, 36 new medications in one year,” etc. usually comes across as “self-adulation” and does more harm than good in the CI’s positioning. It is true that one’s own strengths should not be completely glossed over. But individual, case-related, factually presented success stories that exemplify the benefits of the CI are more suitable for this purpose.

3. CREATING ACCESSIBILITY THROUGH RELATIONSHIP OFFERS AND DIALOG CULTURE

A key role in the successful positioning of the CI is played by its representatives (e.g., CEOs, experts, communications managers). They must succeed more than they have done hitherto in creating a continuous feeling of closeness in contact with stakeholder groups. On this basis, new trust can develop step by step. The people in charge should embody the most important virtues of the CI, such as dialogic communication on an equal basis, a self-confident but at the same time modest demeanor, the willingness to assume responsibility, critical ability, and clarity. To achieve this goal, new and further opportunities for encounters should be created – both digitally in social media and in the analog world, for example at public congresses, but also in technology museums or communication centers directly at the CI’s manufacturing sites.



CHAPTER 5

4. MAKE CHEMISTRY “MORE EVERYDAY”

A statement in communication can be: “Chemistry is everywhere.” But it can also be about a specific process, a very particular solution, or a special product that underlines the special importance that chemistry has in people’s day-to-day lives. From CO₂ savings, lightweight materials for cars, and insulating materials for houses to sports shoes, there are numerous opportunities to make it clear that chemistry provides concrete and, above all, everyday contributions to protecting the climate and the environment.

5. SHOW REAL COMMITMENT TO SOCIALLY RELEVANT ISSUES

A sustainable, credible, and therefore successful positioning of the CI is only achievable through “substance in deeds” – not through communication alone. The attitude displayed to the public must be repeatedly certified by corresponding deeds. This can occur in the area of resource conservation, for example, if the CI contributes to raising environmental standards in other countries (e.g. India and China) by producing fewer emissions that are harmful to the environment or the climate.

Furthermore, concrete commitment means that clear and consistent decisions should be made that indisputably reduce or even avoid negative consequences of industrial production. Agreement on a concrete roadmap for switching from fossil to alternative or renewable raw materials could also highlight such a commitment.

The same applies to improvement of recycling processes and higher proportions of reusable materials. The CI could commit to and implement concrete steps.

It would also be useful to further concretize the work of the climate protection platform (Chemistry4Climate: greenhouse gas neutrality by 2050). Tangible examples should be communicated regularly.

6. PROACTIVE ASSUMPTION OF RESPONSIBILITY

The statement “Chemistry is both a polluter and a solution provider when it comes to climate protection” from the CI’s climate protection concept elicited sympathy and agreement in the surveys. This shows that, in terms of positioning, it pays to take responsibility – especially for problematic aspects of one’s own activity.

This principle should therefore be observed and implemented consistently: socially undesirable “side effects” arising from the CI (environmental damage, animal testing, etc.) should not be kept quiet or talked down, but on the contrary should be proactively addressed. Where solutions are possible in the medium to long term, current work on these solutions should be in the foreground. If such a thematization of responsibility is dispensed with and, instead, a one-sided presentation is chosen that exclusively emphasizes successes and solutions, this will lead to rejection and demonization of the CI.



CHAPTER 6

SEEN FROM THE INSIDE - THE IMAGE OF THE CI AMONG EMPLOYEES AND TRADE UNIONS

The interviews with CI employees show that their perception is strongly characterized by an “inside-outside” effect: Within the CI, there is an almost unanimous sense of community and cohesion. This is in contrast to an outside world that is largely perceived as critical or even hostile. This constellation gives rise to a perception that can be described as a “corral” constellation. Specifically, the respondents cited the following as reasons for the positive internal perception:

- » Good relationship with superiors and colleagues
- » Social partnership
- » Secure job as it is a vital industry
- » Good salaries
- » Employee wellbeing is important
- » Well organized and financially strong
- » Pride and passion
- » An explosive power is pulling the levers
- » Desire to belong to the avant-garde
- » Gold digger mood as the industry is moving forward

At the same time, this internal perception has downsides that are also clearly described. In particular, the following aspects of the “corral” are rated as critical to negative:

- » Shackled: not able to stand still and strike
- » Consensus obligation
- » Meticulous and constricting occupational safety or emergency plans.
- » Sometimes a lack of pride in products because only raw materials are processed
- » Outsourcing of employees is offensive
- » Feel guilty (animal testing, environmental problems, relocation abroad).
- » And the tendency to shift blame to other areas of the CI (blame game).

Due to the coronavirus pandemic and the concomitant changes, the critical aspects have become more acute and new pressures have been added. Specifically, the following were mentioned:

- » Further tightening of security conditions
- » Increase in economic pressure
- » Sometimes feelings of loneliness (home office)
- » Collegiality has yielded to personal arbitrariness

COMMUNITY AND COHESION

INTERNAL PERCEPTION

NEW BURDENS

CHAPTER 6

BURDEN

Employees also experience the atmosphere outside the “corral,” which is largely perceived as inimical to chemicals, as a burden. They report:

- » You are treated like an outsider (“war criminal”)
- » You have to defend yourself all the time
- » Only little recognition and appreciation
- » Reforms of the CI are partly attributed to political pressure

THREE TYPES

Employees distinguish between three types of critical voices that they encounter outside the CI:

- » The interested (smallest group of mainly younger people who are more interested in natural sciences again)
- » The disinterested (largest group)
- » The aversive ideological (small group)

In this context, the impact of the coronavirus pandemic tends to be described as positive: One experiences growing interest in the CI and is sometimes seen as a rescuer because of the vaccine development.

When confronted with external criticism, CI employees react in different ways. In total, five types of reaction can be described:

FIVE TYPES OF REACTIONS

REACTION TYPE 1: IN A HUFF

To avoid painful conflicts and disputes about the role and image of the CI, some employees retreat. In other words:

- » They avoid active discussions outside their own internal world.
- » In doing so, they often feel misunderstood and unfairly vilified.
- » Feelings of suffering, self-pity, and powerlessness set in, since they cannot fight against this strong “outside image.”
- » As a consequence, a strong retreat into their own “ideal” CI world with like-minded people can be observed.

REACTION TYPE 2: JUSTIFICATION STRATEGY

Employees of this type show continual resistance to the negative image of the CI in the “outside world” and chafe at it. They

- » want to convince the outside world of the necessity of the CI and often begin their arguments with “yes, but”;
- » refer to the further development of the industry and the fact that already today many things are running better than before;
- » repeat their arguments with immense patience, but without significantly increasing the understanding of the person they are talking to.

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REACTION TYPE 3: LATENT MEGALOMANIA

This type mainly emphasizes the fun and fascination with the powerful and “explosive” side of the chemical and pharmaceutical world. Here,

- » hidden longings and fantasies of grandeur are lived out;
- » one is impressed by the explosive potency hidden in one’s own industry and at the same time proud of one’s competence to be master of this power.
- » However, this strategy confirms the prejudices of the outside world and is therefore not likely to improve the image of the CI in the eyes of the public.

REACTION TYPE 4: MANIFEST DEMONSTRATION OF POWER

Employees of this type rely on emphasizing the elementary necessity and powerful side of the CI in their confrontation with the chemically critical outside world. They

- » focus very strongly in exchange on the vitality and power of the chemical-pharmaceutical industry;
- » point with pride, for example, to the production of ten million liters of disinfectants in record time or the CI’s power as an economic engine.
- » However, this manner of communicating to the outside world is often perceived as pretentious and provokes a counter-reaction in many people: they compensate for feeling small and incapable vis-à-vis the CI by ignoring or devaluing the industry.

REACTION TYPE 5: ASSUMPTION OF RESPONSIBILITY

Characteristic of this type is an acknowledgement of both one’s own strengths and weaknesses while at the same time being constantly ready for dialog. This strategy

- » is very purposeful from a psychological perspective;
- » creates an equal footing and credibility;
- » enables the CI to remain in the conversation
- » seeks common and viable solutions by weighing up all arguments.

Employees representing this type express views such as:

» YOU HAVE TO BE HONEST. WE ARE A PROBLEM AND A SOLUTION AT THE SAME TIME. ««

Or:

» BETTER ANIMAL TESTING THAN HUMAN LIVES. ««

Or:

» WE ARE GETTING BETTER... BUT A RESIDUAL RISK REMAINS... ««



EXECUTIVE SUMMARY

COMMITMENT THROUGH COME-ALONG MENTALITY - CONCLUSIONS AND RECOMMENDATIONS FOR THE STRATEGIC POSITIONING OF THE CI

The depth-psychological study conducted by the rheingold Institute on behalf of the VCI and IG BCE shows that people's perception of the chemical industry moves in a paradoxical field of tension determined by four central aspects of meaning. In a first spontaneous understanding, the CI appears as an abstract and largely incomprehensible entity. Already in chemistry classes, most of the respondents did not really understand the formulaic world of chemistry. This incomprehensibility is then usually overlaid by a second, rather destructive understanding of the CI as devil's work: smoking chimneys, gigantic and sinister-looking industrial complexes, memories of chemical accidents, and images of smog and yellow snow determine perception and make the CI a potentially dangerous or even destructive industry.

Only in a third understanding does the image of the CI change. People realize that it is an important solutions industry that, as an innovation driver, creates jobs and appears as a welcome rescuer in times of need, especially in the current coronavirus crisis: "Without CI, we would still be living in the Middle Ages and would have neither disinfectants nor vaccines today." In a fourth understanding, people realize that CI is not so abstract at all, but an elementary necessity that helps shape their daily lives:

"Without chemistry, there would be no light bulbs and refrigerators, no electric cars and wind turbines, and certainly no televisions or smartphones."

Paradoxically, people cope better with the negative aspects of CI than with the positive ones. This is because they have profound emotional ambivalence about this innovative and powerful solutions industry. On the one hand, they desire the vital solutions and products of the CI, but on the other, they realize they are dependent on the support and assistance of these protective powers.

The larger, more significant and, above all, more indispensable an industry's solutions are for one's own existence, the smaller and more incapable one feels. "Protective power" industries such as insurance companies and energy suppliers, as well as the chemical industry, almost inevitably offend people, making them feel unable to ensure their protection and health themselves. This feeling elicits defensive reactions and repression. The chemical industry is literally blocked out and made invisible.

FOUR CENTRAL ASPECTS OF SIGNIFICANCE



EXECUTIVE SUMMARY

The importance of chemistry as an elementary necessity of life reinforces these hurt feelings. In view of the indispensability of chemistry in modern and comfortable everyday life, they feel their dependence. Since they neither want to nor can do without the achievements of chemistry, they feel complicit in the negative consequences (climate change, environmental pollution) of the chemical industry. Sometimes they realize their own corruptibility through the “seductive products and services” of the CI.

The positioning of the CI must therefore resolve a paradox: The bigger and more important the CI makes itself out to be as a problem solver and progress bringer, the smaller, more incapable, and more dependent consumers feel. The strategic challenge for the CI is to assume its great importance, its innovative power, and its increasingly important role as a problem solver without triggering feelings of dependency, smallness, and inability in people.

The CI can succeed in this by not primarily proclaiming its size and power, but rather by pushing forward its social commitment as an innovative problem solver. The CI generates a productive “come along” mentality primarily through exchange and the inclusion of all relevant social groups, from the IG BCE to politicians and NGOs.

In general, the CI should not appear as a dominant protective power, but as a growth promoter that puts itself at the service of society and the individual. The communication tonality should therefore be characterized by proud modesty and sovereign self-relativization. The CI can create a sense of an equal footing and accessibility by offering relationships and a new dialogue culture.

Above all, it can create trust by means of approachable representatives who seek public debate on an equal footing with both self-confidence and self-criticism. The CI’s commitment to socially relevant issues should be confirmed by concrete actions and projects, for example in the area of resource conservation and the climate protection platform (Chemistry4Climate).

**INNOVATIVE
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