



# Opinion Survey: What is Quality to CEOs and how do they Value it?

*November 2019*

*“opinionway*

15 place de la République 75003 Paris



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# METHODOLOGY

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# Methodology



The study was carried out on a sample of **253 senior executives, of companies of 50 or more employees, in the consumer goods, chemicals and cosmetics industries.**

The sample was created using the **quota method**, on the criteria of numbers of employees and sectors of activity.



The sample group was questioned by **telephone** using a CATI (*Computer Assisted Telephone Interview*) system.



Interviews took place from **August 27 to September 13, 2019.**



OpinionWay carried out this survey in accordance with the principles and rules for the **ISO 20252** standard.



Readers should take into account a **margin of uncertainty** of 2.7 to 6.2 points maximum for a sample of 250 respondents.

**Any full or partial publication must include the following wording:**

**“OpinionWay survey for Veeva”**

**and any reuse of the survey may not be dissociated from this title.**

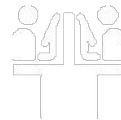


# The respondents' profile

Senior executives, of companies of 50 or more employees, in the consumer goods, chemicals and cosmetics industries



Turnover	%
Less than 10 million euros	18%
From 10 to 19 million euros	19%
From 20 to 49 million euros	20%
From 50 to 99 million euros	8%
100 million euros or more	8%



Activity sector	%
Consumer goods	96%
Chemicals and cosmetics	4%





# RESULTS

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**01**



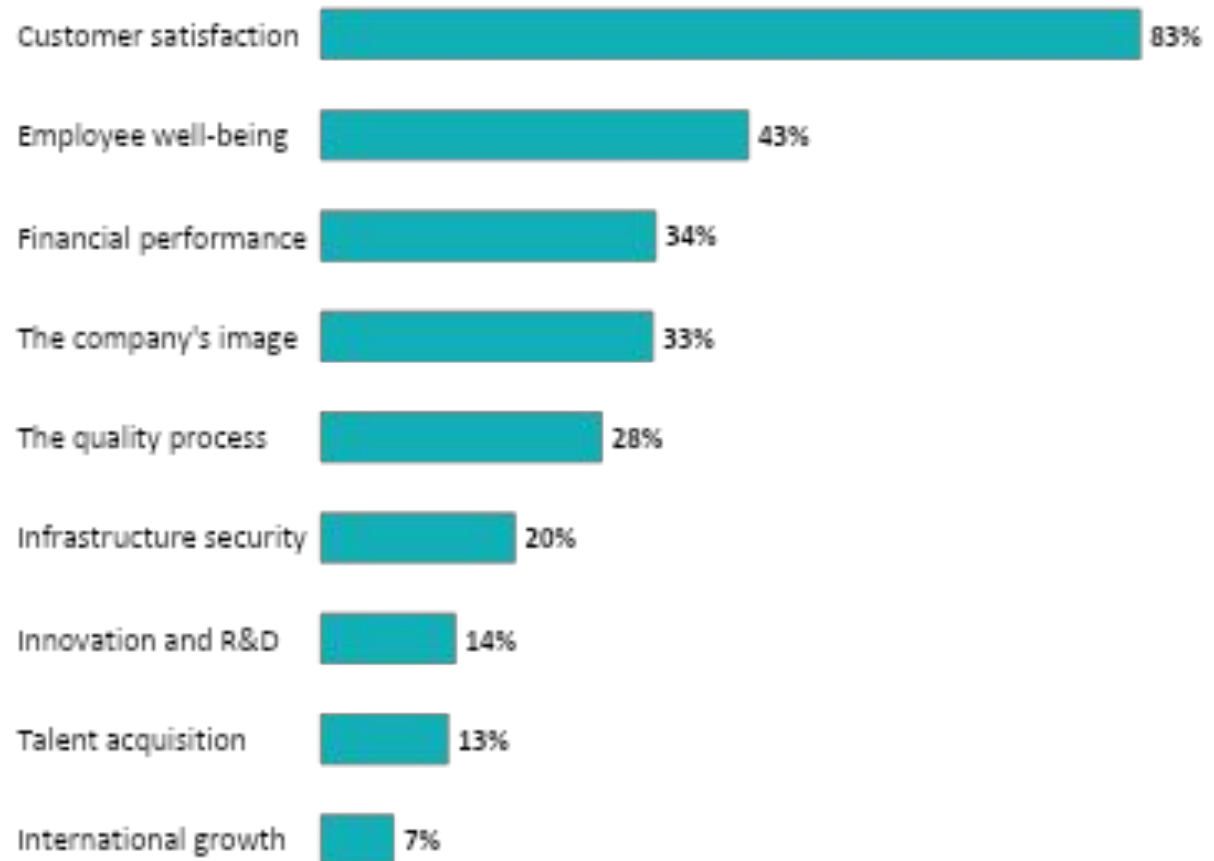
## The importance of quality



# The major challenges for businesses

Q1. Among the following challenges, which are the most important for your business?

*Three possible answers - Total greater than 100%*





# The major challenges for businesses

Q1. Among the following challenges, which are the most important for your business?

Three possible answers - Total greater than 100%



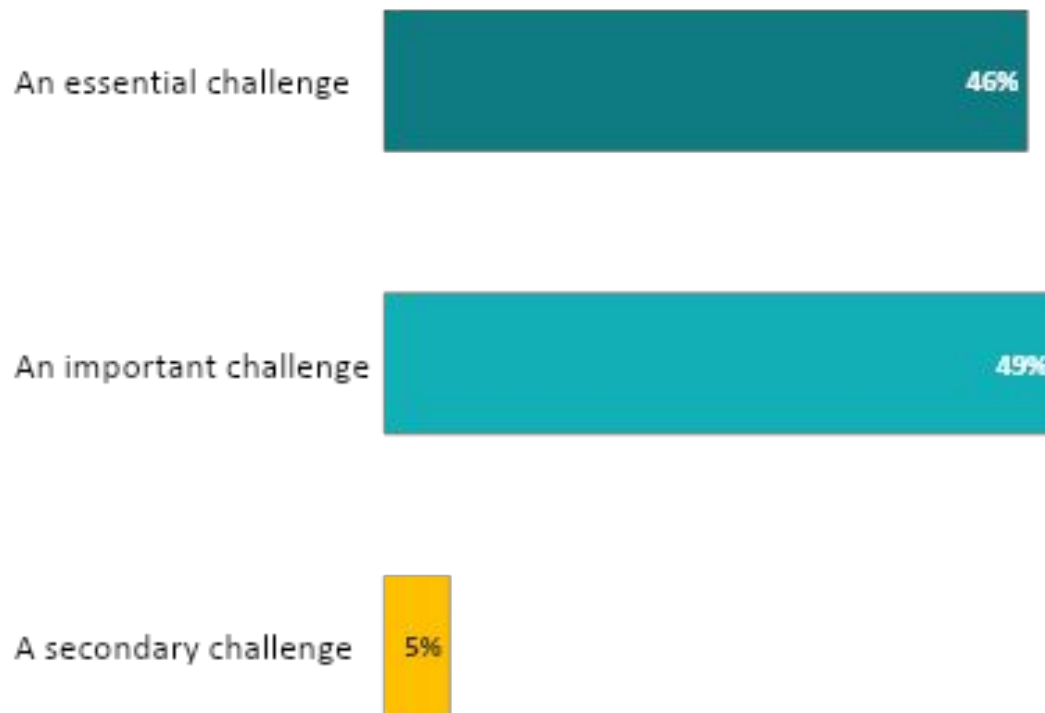
	Total	Activity sector		Number of employees			Turnover			
		Consumer goods	Chemicals and cosmetics*	50 to 99 employees	100 to 249 employees	250 employees and more	Less than 10 million euros	From 10 to 19 million euros	From 20 to 49 million euros	50 million euros or more*
Customer satisfaction	<b>83%</b>	82%	85%	80%	87%	81%	82%	72%	92%	85%
Employee well-being	<b>43%</b>	45%	30%	41%	46%	42%	50%	43%	50%	33%
Financial performance	<b>34%</b>	33%	42%	30%	31%	46%	33%	31%	43%	47%
The company's image	<b>33%</b>	36%	19%	38%	25%	37%	45%	30%	22%	35%
The quality process	<b>28%</b>	29%	22%	30%	29%	24%	34%	27%	17%	24%
Infrastructure security	<b>20%</b>	18%	28%	14%	24%	26%	12%	20%	17%	27%
Innovation and R&D	<b>14%</b>	12%	24%	15%	14%	11%	9%	24%	15%	10%
Talent acquisition	<b>13%</b>	12%	20%	18%	9%	8%	15%	23%	6%	10%
International growth	<b>7%</b>	7%	9%	7%	7%	8%	8%	9%	14%	6%

\*Low sample number, treat results with caution



# The importance of the quality process challenge

Q2. For your business, do you consider the quality process to be an essential, important or secondary challenge?



**95%**  
of business leaders consider the  
quality process to be an important  
or essential challenge



# The importance of the quality process challenge

Q2. For your business, do you consider the quality process to be an essential, important or secondary challenge?



		Activity sector		Number of employees			Turnover			
	Total	Consumer goods	Chemicals and cosmetics*	50 to 99 employees	100 to 249 employees	250 employees and more	Less than 10 million euros	From 10 to 19 million euros	From 20 to 49 million euros	50 million euros or more*
An essential challenge	46%	47%	45%	38%	48%	61%	52%	38%	40%	55%
An important challenge	49%	48%	49%	57%	45%	37%	46%	53%	52%	40%
A secondary challenge	5%	5%	6%	5%	6%	2%	2%	9%	8%	5%

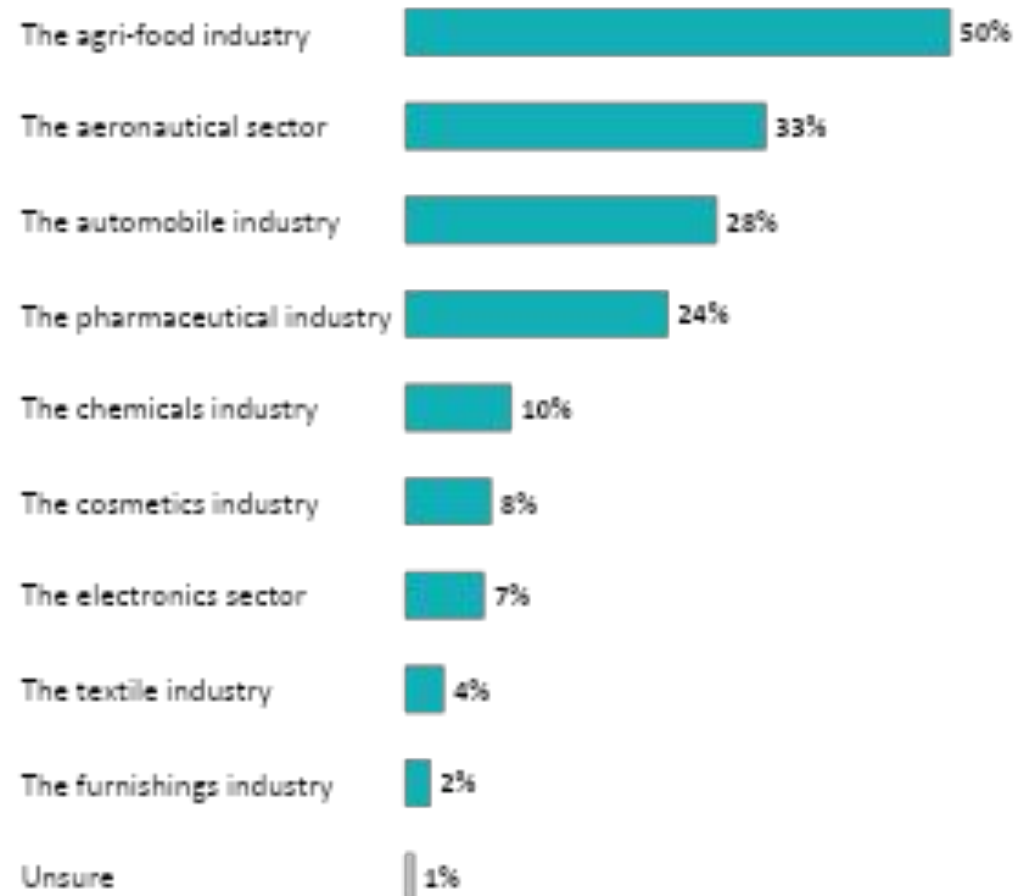
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# Industries that best illustrate the quality process

Q3. For you, which of the following sectors best illustrates the quality process?

*Two possible answers - Total greater than 100%*





# Industries that best illustrate the quality process

Q3. For you, which of the following sectors best illustrates the quality process?

Two possible answers - Total greater than 100%



	Total	Activity sector		Number of employees			Turnover			
		Consumer goods	Chemicals and cosmetics*	50 to 99 employees	100 to 249 employees	250 employees and more	Less than 10 million euros	From 10 to 19 million euros	From 20 to 49 million euros	50 million euros or more*
The agri-food industry	<b>50%</b>	52%	36%	55%	50%	39%	50%	48%	48%	43%
The aeronautical sector	<b>33%</b>	32%	39%	35%	28%	37%	36%	34%	30%	44%
The automobile industry	<b>28%</b>	26%	48%	22%	31%	38%	31%	20%	41%	41%
The pharmaceutical industry	<b>24%</b>	25%	17%	19%	28%	29%	25%	28%	21%	37%
The chemicals industry	<b>10%</b>	10%	11%	13%	11%	2%	11%	10%	10%	5%
The cosmetics industry	<b>8%</b>	8%	10%	4%	10%	12%	7%	6%	7%	6%
The electronics sector	<b>7%</b>	7%	9%	7%	4%	13%	7%	15%	10%	2%
The textile industry	<b>4%</b>	3%	7%	4%	5%	-	7%	-	2%	5%
The furnishings industry	<b>2%</b>	3%	-	3%	3%	-	2%	-	-	5%

\* Low sample number, treat results with caution



# 02

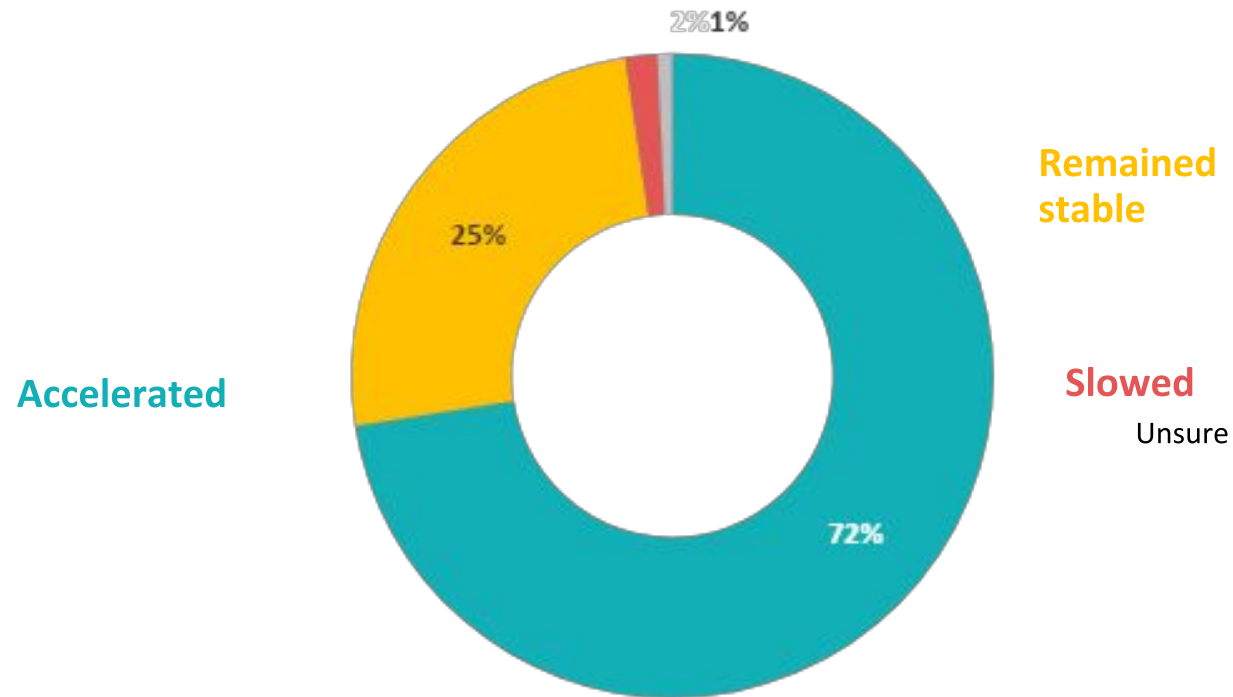


## The development of the quality process



# Evolution of the quality process in the last 5 years

Q4. Would you say that the adoption of the quality process has accelerated, slowed or remained stable in your company in the last 5 years?





# Evolution of the quality process in the last 5 years

Q4. Would you say that the adoption of the quality process has accelerated, slowed or remained stable in your company in the last 5 years?



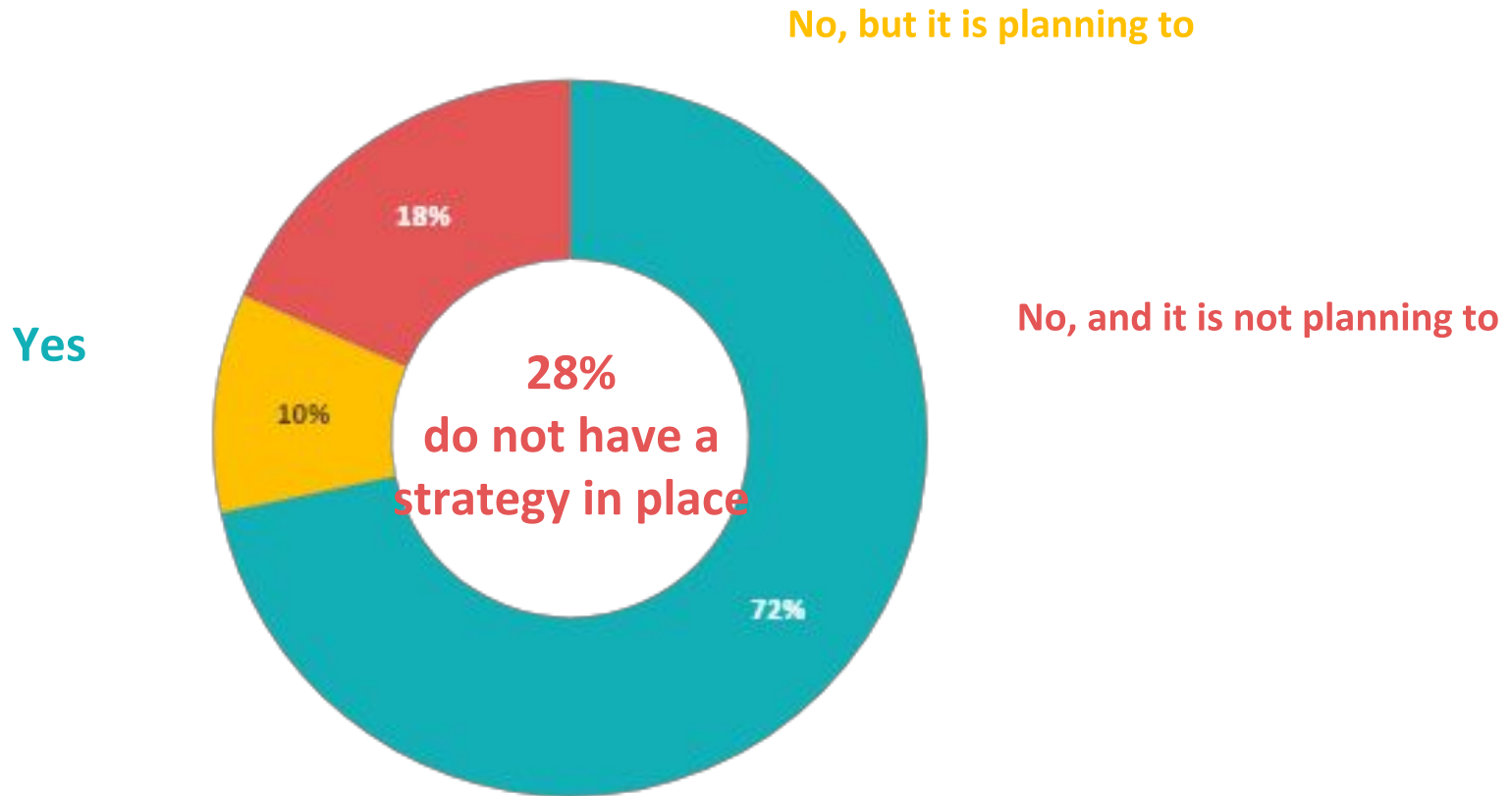
	Total	Activity sector		Number of employees			Turnover			
		Consumer goods	Chemicals and cosmetics*	50 to 99 employees	100 to 249 employees	250 employees and more	Less than 10 million euros	From 10 to 19 million euros	From 20 to 49 million euros	50 million euros or more*
Accelerated	<b>72%</b>	71%	82%	75%	68%	74%	87%	68%	58%	84%
Remained stable	<b>25%</b>	27%	15%	25%	27%	22%	13%	30%	42%	13%
Slowed	<b>2%</b>	1%	3%	-	3%	4%	-	2%	-	3%

\* Low sample number, treat results with caution



# Adoption of a quality process strategy

Q5. Does your company have a strategy for accelerating adoption of the quality process among its employees?





# Adoption of a quality process strategy

Q5. Does your company have a strategy for accelerating adoption of the quality process among its employees?



	Activity sector		Number of employees				Turnover			
	Total	Consumer goods	Chemicals and cosmetics*	50 to 99 employees	100 to 249 employees	250 employees and more	Less than 10 million euros	From 10 to 19 million euros	From 20 to 49 million euros	50 million euros or more*
<b>Sub-total Yes or planning to</b>	<b>82%</b>	<b>80%</b>	<b>91%</b>	<b>77%</b>	<b>86%</b>	<b>85%</b>	<b>88%</b>	<b>85%</b>	<b>76%</b>	<b>85%</b>
...of which Yes	<b>72%</b>	71%	78%	67%	74%	77%	66%	79%	66%	82%
....of which No but planning to	<b>10%</b>	9%	13%	10%	12%	8%	22%	6%	10%	3%
<b>No and not planning to</b>	<b>18%</b>	<b>20%</b>	<b>9%</b>	<b>23%</b>	<b>14%</b>	<b>15%</b>	<b>12%</b>	<b>15%</b>	<b>24%</b>	<b>15%</b>

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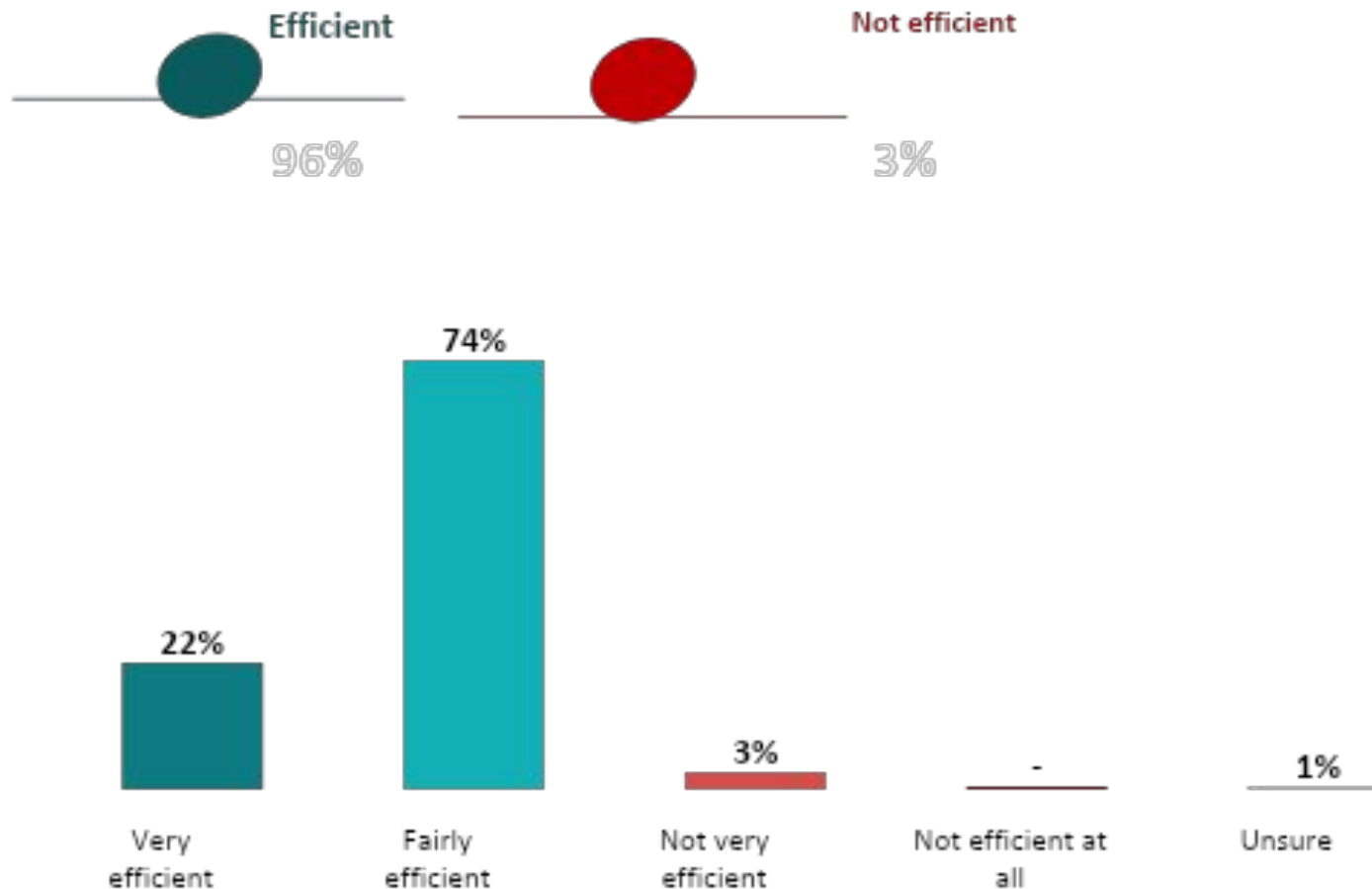


# Efficiency of the quality process strategy



Q6. And would you say that this strategy for accelerating the adoption of the quality process is efficient, or not efficient?

*Question asked only to leaders whose companies have a clear strategy for accelerating the quality process — 72% of the sample*





# Efficiency of the quality process strategy

Q6. And would you say that this strategy for accelerating the adoption of the quality process is efficient, or not efficient?



Question asked only to leaders whose companies have a clear strategy for accelerating the quality process — 72% of the sample

	Total	Activity sector		Number of employees			Turnover			
		Consumer goods	Chemicals and cosmetics*	50 to 99 employees	100 to 249 employees	250 employees and more*	Less than 10 million euros*	From 10 to 19 million euros*	From 20 to 49 million euros*	50 million euros or more*
<b>Sub-total Efficient</b>	<b>96%</b>	<b>95%</b>	<b>100%</b>	<b>94%</b>	<b>98%</b>	<b>98%</b>	<b>82%</b>	<b>100%</b>	<b>100%</b>	<b>97%</b>
Very efficient	22%	20%	32%	17%	25%	27%	19%	21%	18%	21%
Fairly efficient	74%	75%	68%	77%	73%	71%	63%	79%	82%	76%
<b>Sub-total Not efficient</b>	<b>3%</b>	<b>4%</b>	<b>-</b>	<b>5%</b>	<b>2%</b>	<b>2%</b>	<b>18%</b>	<b>-</b>	<b>-</b>	<b>3%</b>
Not very efficient	3%	3%	-	4%	2%	2%	15%	-	-	3%
Not efficient at all	0%	1%	-	1%	-	-	3%	-	-	-

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# Responsibility for the quality process

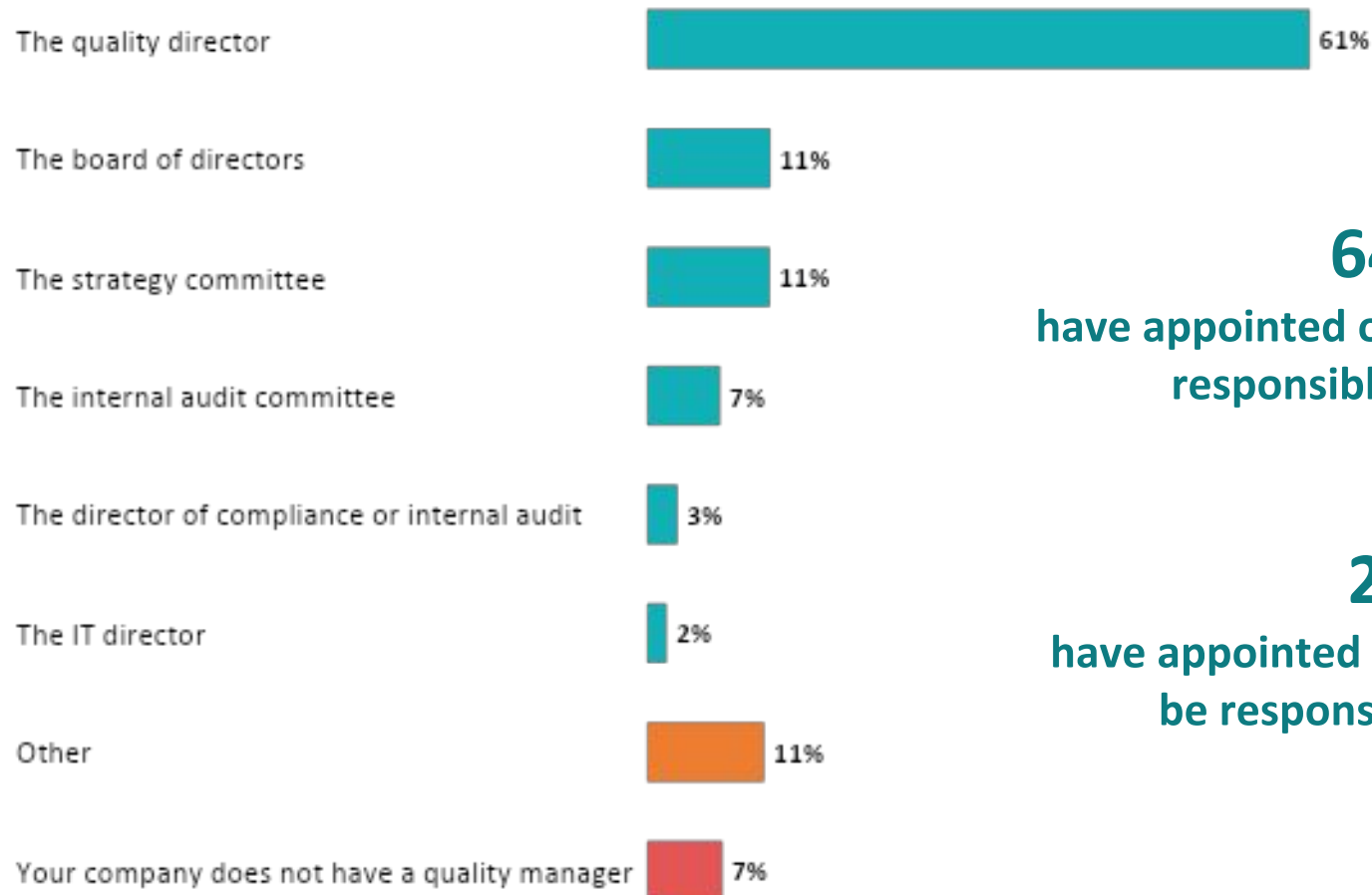
Q7. In your company, who is responsible for developing the quality process?

Two possible answers - Total greater than 100%



253

senior  
executives



**64%**  
have appointed one *individual* to be  
responsible for quality

**29%**  
have appointed a *group of people* to  
be responsible for quality





# Responsibility for the quality process

Q7. In your company, who is responsible for developing the quality process?

Two possible answers - Total greater than 100%



	Total	Activity sector		Number of employees			Turnover			
		Consumer goods	Chemicals and cosmetics*	50 to 99 employees	100 to 249 employees	250 employees and more	Less than 10 million euros	From 10 to 19 million euros	From 20 to 49 million euros	50 million euros or more*
<b>Subtotal Has appointed a manager</b>	<b>93%</b>	<b>93%</b>	<b>94%</b>	<b>90%</b>	<b>94%</b>	<b>97%</b>	<b>89%</b>	<b>94%</b>	<b>96%</b>	<b>100%</b>
The quality director	<b>61%</b>	59%	73%	53%	65%	71%	53%	55%	62%	77%
The board of directors	<b>11%</b>	13%	-	11%	11%	13%	15%	11%	10%	8%
The strategy committee	<b>11%</b>	10%	18%	12%	11%	10%	13%	6%	10%	18%
The internal audit committee	<b>7%</b>	7%	6%	4%	8%	9%	9%	7%	9%	2%
The director of compliance or internal audit	<b>3%</b>	2%	9%	4%	3%	-	2%	2%	4%	4%
The IT director	<b>2%</b>	1%	7%	3%	-	3%	4%	-	-	6%
Other	<b>11%</b>	12%	-	15%	9%	3%	11%	19%	12%	5%
<b>Your company does not have a quality manager</b>	<b>7%</b>	<b>7%</b>	<b>6%</b>	<b>10%</b>	<b>6%</b>	<b>3%</b>	<b>11%</b>	<b>6%</b>	<b>4%</b>	<b>-</b>

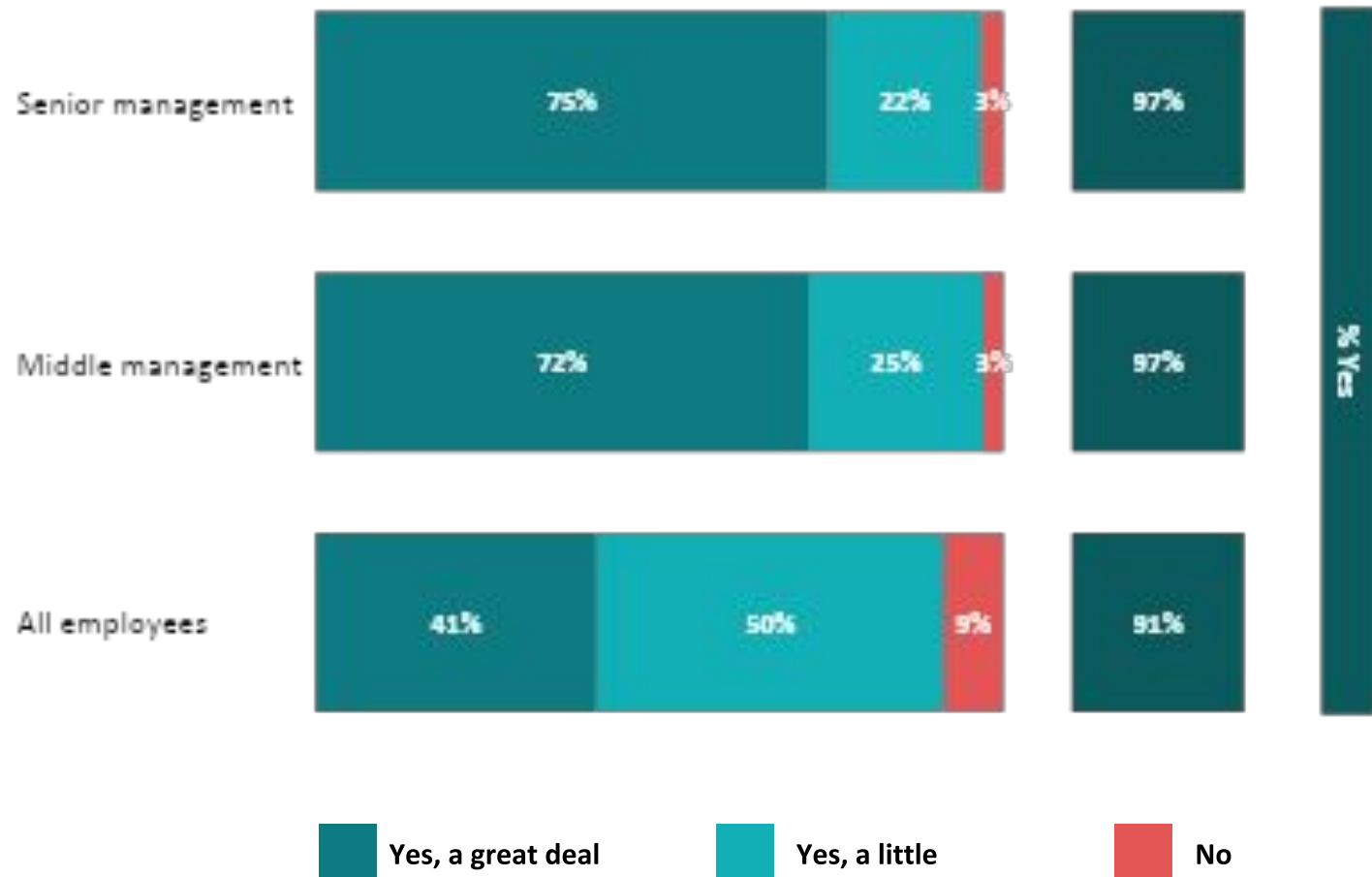
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# The involvement of each management level in the quality process

Q8. Would you say that each of the following management levels contributes to the quality process?

253  
senior executives





# The involvement of each management level in the quality process

Q8. Would you say that each of the following management levels contributes to the quality process?



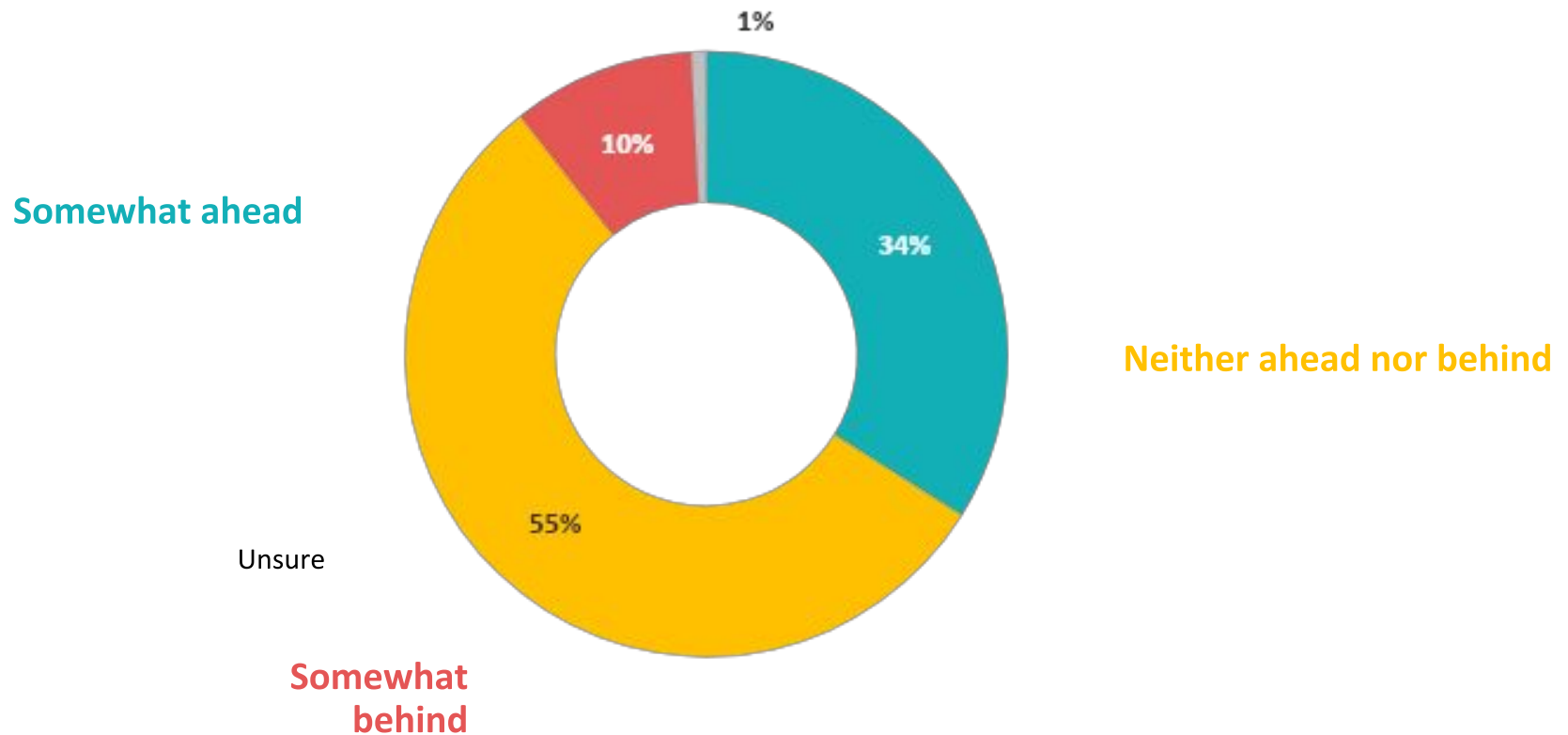
	% Yes	Activity sector		Number of employees			Turnover			
		Consumer goods	Chemicals and cosmetics*	50 to 99 employees	100 to 249 employees	250 employees and more	Less than 10 million euros	From 10 to 19 million euros	From 20 to 49 million euros	50 million euros or more*
Senior management	<b>97%</b>	97%	100%	97%	95%	98%	100%	96%	94%	98%
Middle management	<b>97%</b>	97%	100%	97%	99%	95%	100%	93%	100%	100%
All employees	<b>91%</b>	93%	82%	94%	89%	91%	98%	89%	91%	92%

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# Your company's progress with the quality process

Q9. In your view, is your company ahead of, or behind the competition, when it comes to the quality process?





# Your company's progress with the quality process

Q9. In your view, is your company ahead of, or behind the competition, when it comes to the quality process?



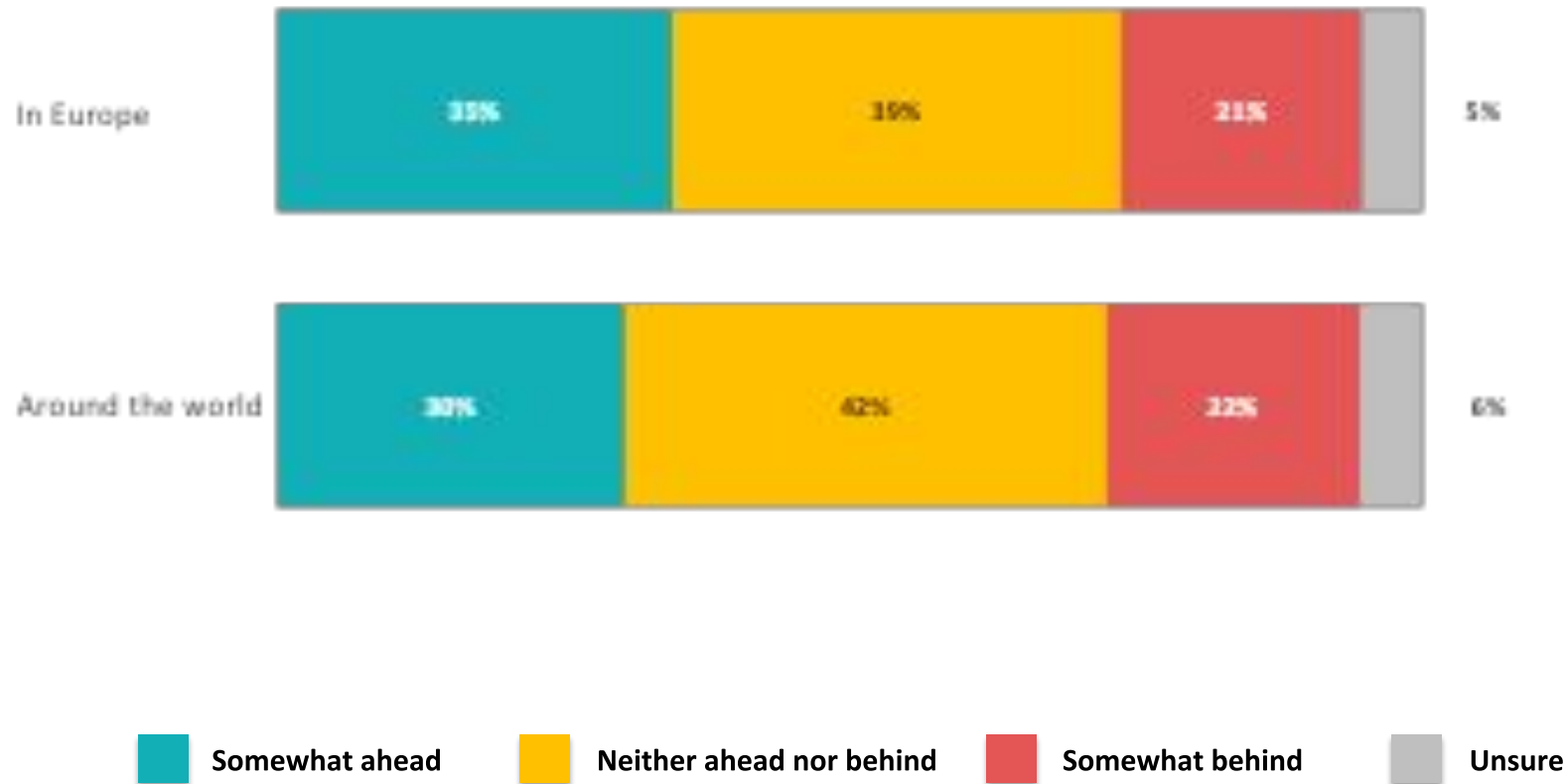
	Total	Activity sector		Number of employees			Turnover			
		Consumer goods	Chemicals and cosmetics*	50 to 99 employees	100 to 249 employees	250 employees and more	Less than 10 million euros	From 10 to 19 million euros	From 20 to 49 million euros	50 million euros or more*
Somewhat ahead	<b>34%</b>	32%	44%	29%	36%	41%	37%	24%	36%	41%
Neither ahead nor behind	<b>55%</b>	58%	43%	62%	53%	47%	48%	68%	48%	55%
Somewhat behind	<b>10%</b>	10%	9%	8%	10%	12%	15%	8%	14%	4%

\* Low sample number, treat results with caution



# European vs. Non European Companies progress in developing the quality process

Q10. And would you say that European companies in general are ahead of, or behind other companies in setting up the quality process?





# European vs. Non European companies' progress in developing the quality process

Q10. And would you say that European companies in general are ahead of, or behind other companies in setting up the quality process?



In Europe										
	Total	Activity sector	Number of employees	Turnover						
		Consumer goods	Chemicals and cosmetics*	50 to 99 employees	100 to 249 employees	250 employees and more	Less than 10 million euros	From 10 to 19 million euros	From 20 to 49 million euros	50 million euros or more*
Somewhat ahead	<b>35%</b>	34%	36%	38%	28%	36%	45%	32%	34%	40%
Neither ahead nor behind	<b>39%</b>	40%	31%	39%	42%	37%	26%	45%	43%	30%
Somewhat behind	<b>21%</b>	21%	24%	18%	24%	24%	25%	13%	19%	28%

Around the world										
	Total	Activity sector	Number of employees	Turnover						
		Consumer goods	Chemicals and cosmetics*	50 to 99 employees	100 to 249 employees	250 employees and more	Less than 10 million euros	From 10 to 19 million euros	From 20 to 49 million euros	50 million euros or more*
Somewhat ahead	<b>30%</b>	28%	46%	32%	32%	25%	31%	30%	26%	40%
Neither ahead nor behind	<b>42%</b>	45%	21%	41%	43%	45%	33%	49%	48%	38%
Somewhat behind	<b>22%</b>	21%	30%	22%	21%	23%	30%	13%	22%	22%

\*Low sample number, treat results with caution

**03**



**Opinions on the quality  
process**

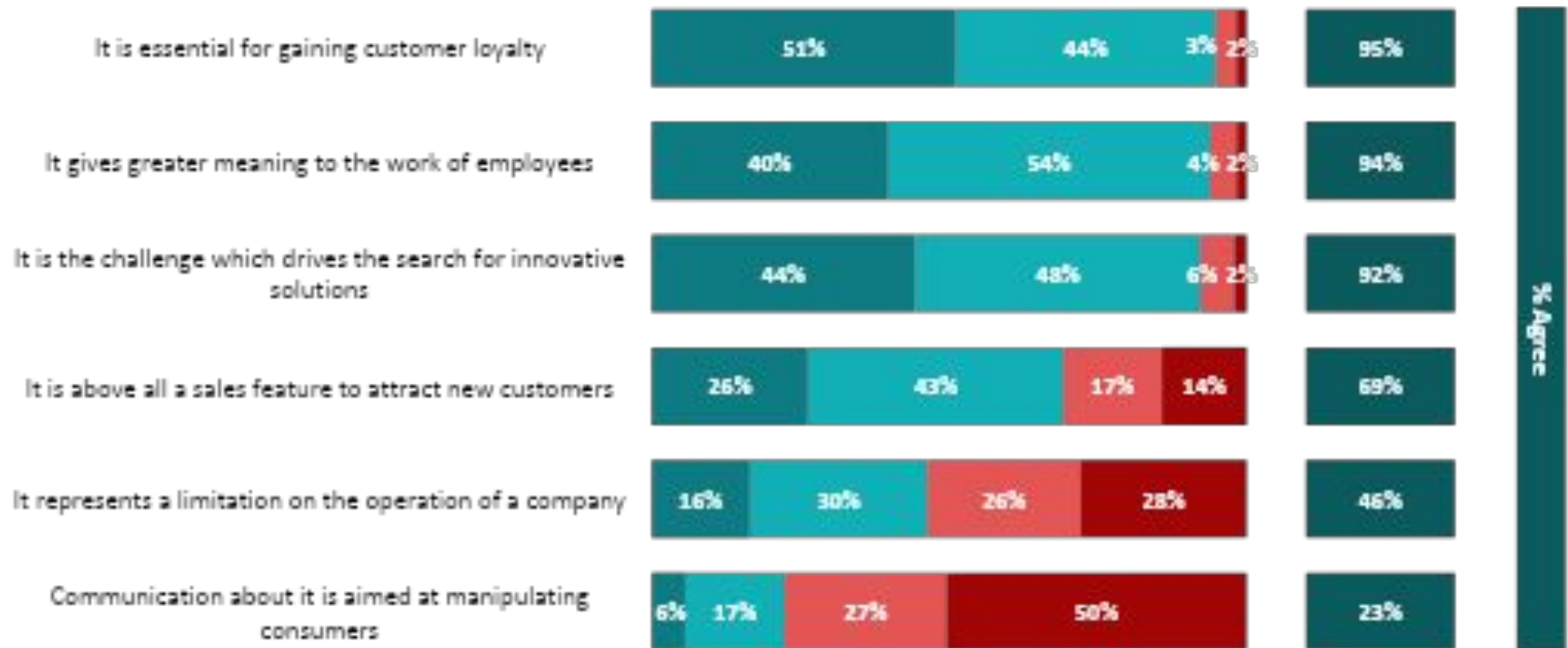




# Perception of the quality process

Q11. Do you agree, or not, with each of the following statements about the quality process?

253  
senior executives



Entirely agree



Agree somewhat



Disagree somewhat



Completely disagree



# Perception of the quality process

Q11. Do you agree, or not, with each of the following statements about the quality process?



	% Agree	Activity sector		Number of employees			Turnover			
		Consumer goods	Chemicals and cosmetics*	50 to 99 employees	100 to 249 employees	250 employees and more	Less than 10 million euros	From 10 to 19 million euros	From 20 to 49 million euros	50 million euros or more*
It is essential for gaining customer loyalty	<b>95%</b>	96%	91%	93%	97%	95%	95%	98%	92%	98%
It gives greater meaning to the work of employees	<b>94%</b>	94%	93%	93%	93%	98%	91%	92%	90%	98%
It is the challenge which drives the search for innovative solutions	<b>92%</b>	93%	86%	94%	92%	89%	90%	92%	96%	91%
It is above all a sales feature to attract new customers	<b>69%</b>	69%	72%	72%	71%	63%	70%	71%	60%	69%
It represents a limitation on the operation of a company	<b>46%</b>	48%	32%	53%	45%	36%	50%	49%	43%	46%
Communication about it is aimed at manipulating consumers	<b>23%</b>	21%	33%	26%	18%	21%	24%	11%	18%	25%

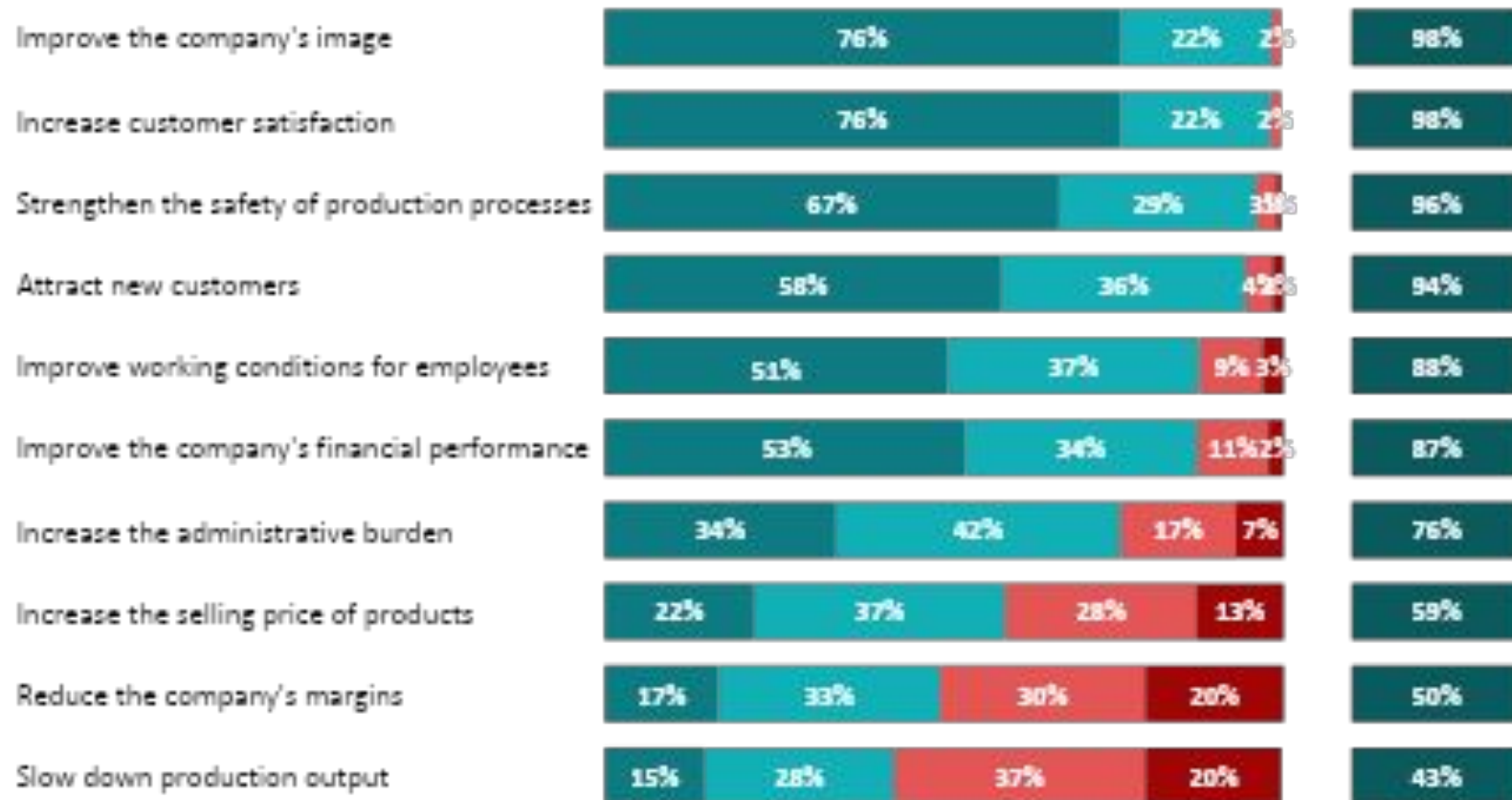
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# The consequences of developing the quality process


Q12. In your view, developing the quality process within a company will...?


  
253  
senior executives



 Yes, certainly

 Yes, probably

 No, probably not

 No, certainly not



# The consequences of developing the quality process

Q12. In your view, developing the quality process within a company will...?



	% Yes	Activity sector		Number of employees			Turnover			
		Consumer goods	Chemicals and cosmetics*	50 to 99 employees	100 to 249 employees	250 employees and more	Less than 10 million euros	From 10 to 19 million euros	From 20 to 49 million euros	50 million euros or more*
Improve the company's image	<b>98%</b>	99%	98%	98%	98%	98%	100%	100%	98%	98%
Increase customer satisfaction	<b>98%</b>	99%	94%	98%	97%	100%	98%	100%	94%	100%
Strengthen the safety of production processes	<b>96%</b>	96%	97%	99%	91%	96%	94%	98%	97%	93%
Attract new customers	<b>94%</b>	95%	90%	96%	94%	92%	93%	100%	96%	88%
Improve working conditions for employees	<b>88%</b>	87%	88%	87%	82%	96%	89%	96%	72%	85%
Improve the company's financial performance	<b>87%</b>	87%	94%	85%	90%	90%	89%	82%	78%	88%
Increase the administrative burden	<b>76%</b>	75%	80%	78%	75%	74%	75%	77%	68%	81%
Increase the selling price of products	<b>59%</b>	61%	48%	59%	63%	53%	58%	70%	49%	54%
Reduce the company's margins	<b>50%</b>	48%	57%	54%	48%	41%	36%	56%	45%	48%
Slow down production output	<b>43%</b>	42%	47%	37%	49%	43%	41%	39%	42%	42%

\* Low sample number, treat results with caution



# The levers for developing the quality process

Q13. In your view, which of the following levers is the most important for developing the quality process in a company?





# The levers for developing the quality process

Q13. In your view, which of the following levers is the most important for developing the quality process in a company?



	Total	Activity sector		Number of employees			Turnover			
		Consumer goods	Chemicals and cosmetics*	50 to 99 employees	100 to 249 employees	250 employees and more	Less than 10 million euros	From 10 to 19 million euros	From 20 to 49 million euros	50 million euros or more*
Management	<b>45%</b>	45%	47%	44%	38%	58%	45%	47%	42%	50%
Training	<b>32%</b>	32%	30%	33%	33%	26%	27%	31%	36%	31%
Creation of a position of a quality manager or quality team	<b>14%</b>	13%	15%	13%	15%	13%	16%	10%	16%	12%
Hardware available to teams	<b>5%</b>	6%	-	4%	9%	-	9%	4%	2%	2%
Software available to teams	<b>4%</b>	3%	8%	5%	3%	3%	-	8%	4%	5%

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*« Rendre le monde intelligible pour agir aujourd’hui et imaginer demain. »*