

# Trends In European

# Public Affairs

## Survey Report

# 2024

## EXECUTIVE SUMMARY

The Trends in European Public Affairs survey, conducted each year by the Public Affairs Council, provides the European public affairs community with insights on some of the major challenges facing the profession today. The survey report looks at how geopolitics, sustainability, technology, and diversity impact the public affairs function, and identifies strategies that can be used to address them.

**Political and policy uncertainty tops public affairs executives' concerns.** In a year when the agenda has been dominated by elections in Europe and around the world, public affairs professionals report that “industry-specific developments and legislation” (**59%**), “the new make-up of the main EU institutions” (**59%**), and “political developments in EU member states” (**53%**) have been key external factors affecting their organizations' operating environment. A large majority of respondents (**89%**) agrees their public affairs team plays an important role in helping them manage the impact of these external risks.

**In-person engagement is back; Twitter/X's influence is eroding.** The importance of in-person connections for engagement cannot be understated. An overwhelming **98%** and **79%** of respondents, respectively, consider in-person meetings and in-person events as critical tools for successful engagement with external stakeholders. Other popular tools include direct emails (**59%**), virtual meetings (**56%**), LinkedIn (**42%**) and public position papers (**40%**). On the other hand, the use of Twitter/X is decreasing, and the platform is seen by only **6%** of respondents as a key tool for external engagement in the European Union (down from **20%** in 2023).

**Public Affairs executives are increasingly confident about artificial intelligence (AI) adoption.** A majority of respondents (**70%**) believes AI tools will be adopted by a majority of European organizations for their public affairs and communication work in the next 12 months. This represents a substantial increase in comparison to last year, when only **46%** of respondents held the same belief. Open AI's ChatGPT remains the most used AI tool for communication and public affairs work (preferred by **69%** of respondents), followed by Microsoft's Copilot (**36%**) and Google's Gemini (**15%**). Only one-fifth of respondents don't use AI tools in their public affairs and communication work.

**Sustainability and ESG-related issues remain high on the list of public affairs priorities.** Despite the political uncertainty of 2024, a large majority of respondents (**90%**) sees sustainability and ESG (Environmental, Social and Governance) criteria as areas in which their organizations are facing rising public expectations and increasing regulations from the EU. A similar percentage of respondents reports their organizations are committed to sustainability and ESG and sees them as a policy priority for the year ahead.

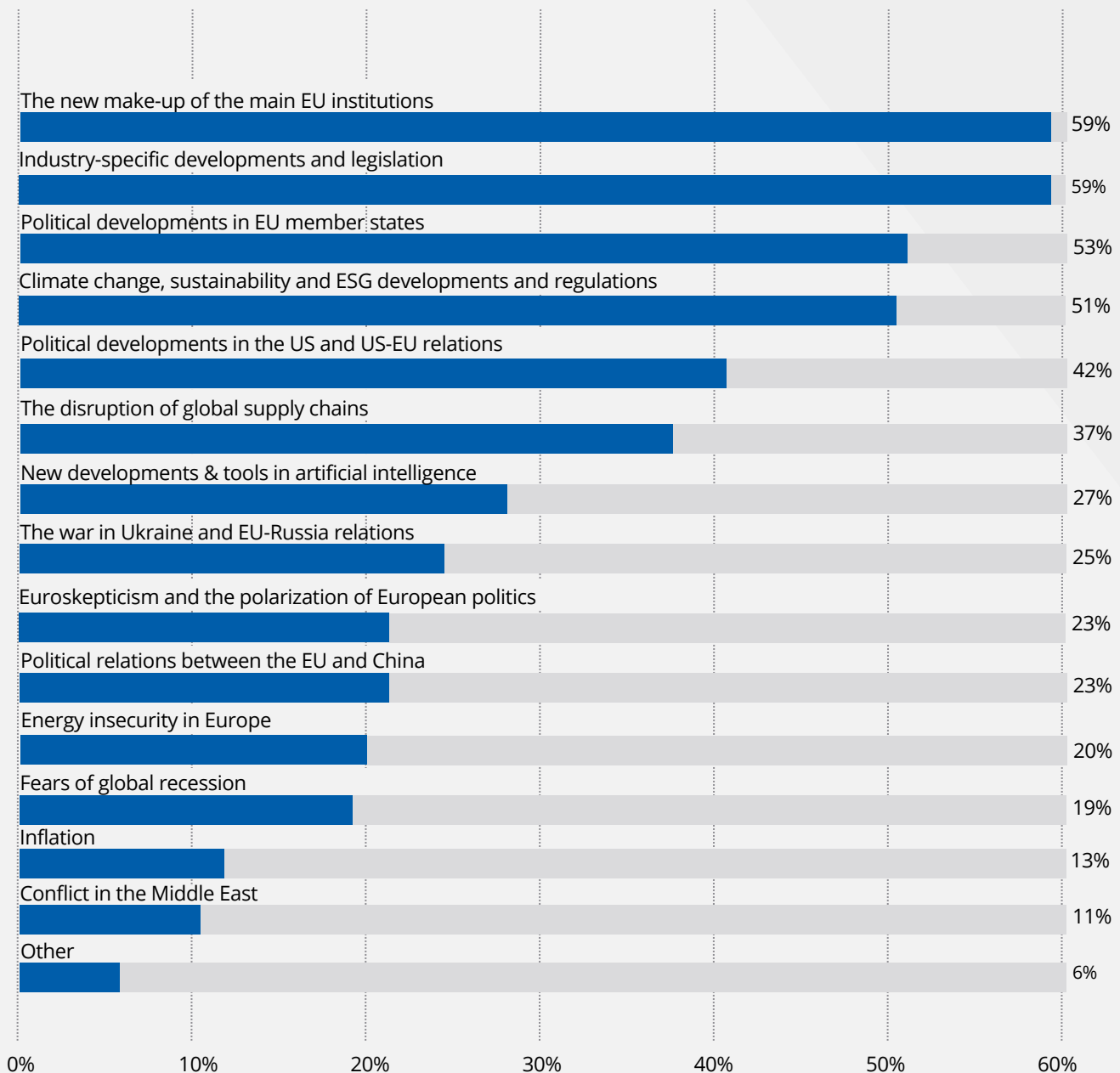
**Slight improvements made in diversity perceptions, but there is still a long way to go.** The perception of the public affairs community about its own diversity has slightly improved over the past year, with **60%** considering the profession's diversity to be either in line with the diversity of the market as a whole or above average, compared to **56%** last year. But **40%** still perceive the profession's diversity as somewhat below average or well below average.

## The Drivers of Global Uncertainty

Global risk perceptions within the European public affairs community reflect the political uncertainty and policy slowdown of 2024. With many European – and global – democracies going to the polls, survey respondents say the top external factors impacting their organizations’ operating environment are “industry-specific developments and legislation” (59%), “the new make-up of the main EU institutions” (59%), and “political developments in EU member states” (53%).

Other factors, including environmental concerns (“climate change, sustainability and ESG developments and regulations”), global geopolitical concerns (“political developments in the U.S. and U.S.-EU relations”), economic concerns (“the disruption of global supply chains”), and technological concerns (“new developments and tools in artificial intelligence”) feature prominently. These findings highlight the complex, multi-risk environment in which public affairs teams are operating.

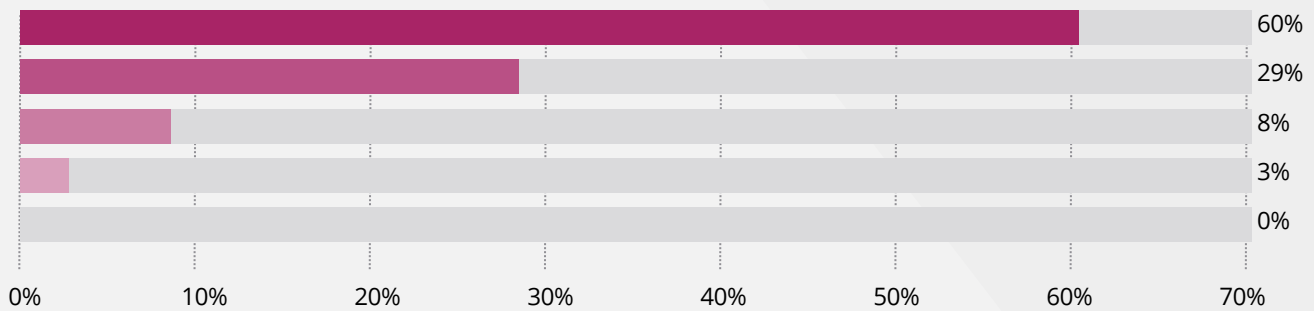
**Which of the following factors do you believe will have the most impact on your organization’s operational environment in the next 12 months? (select the 5 which you believe will have the greatest impact)**



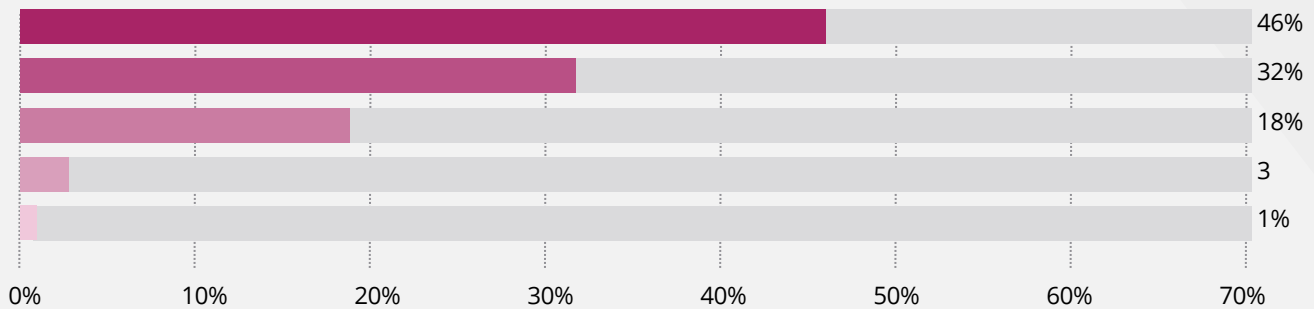
Public affairs professionals continue to perceive their function as critical to managing external risk, with **89%** agreeing or somewhat agreeing with the statement “my public affairs team plays an important role in helping my organization manage the impact of external risk.” Among survey respondents, **78%** see the public affairs function as being perceived inside their organization as more strategic today than it was two years ago.

★ Strongly agree      ★ Somewhat agree  
 ★ Neither agree nor disagree      ★ Somewhat disagree      ★ Strongly disagree

**Thinking about the factors listed in the previous question, to what extent do you agree with the following statement: “My public affairs team plays an important role in helping my organization manage the impact of external risk.”?**



**To what extent do you agree with the following statement: “The public affairs function is perceived inside my organization as more strategic today than it was 2 years ago.”?**



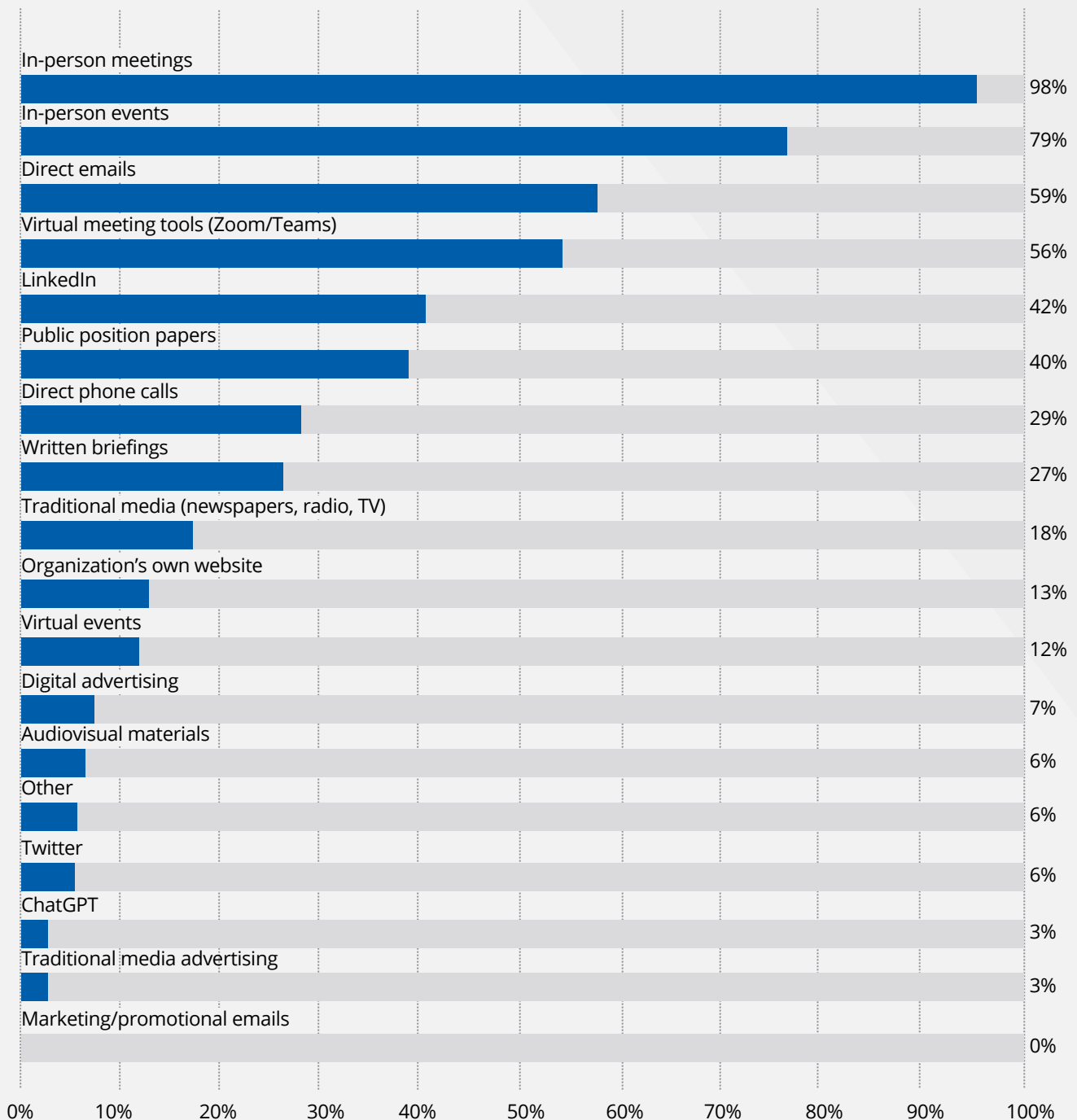
**Key takeaways:**

- ★ Political and policy uncertainty in Brussels and in EU capitals top external risk perceptions.
- ★ Climate change, sustainability and ESG developments and regulations remain key external factors affecting European organizations.
- ★ Public affairs professionals take seriously the impact of geopolitical risks and Europe’s relations with other countries and regions.
- ★ Public affairs professionals see their function as critical to helping organizations understand and manage the impact of global risk.

## Technology and Public Affairs

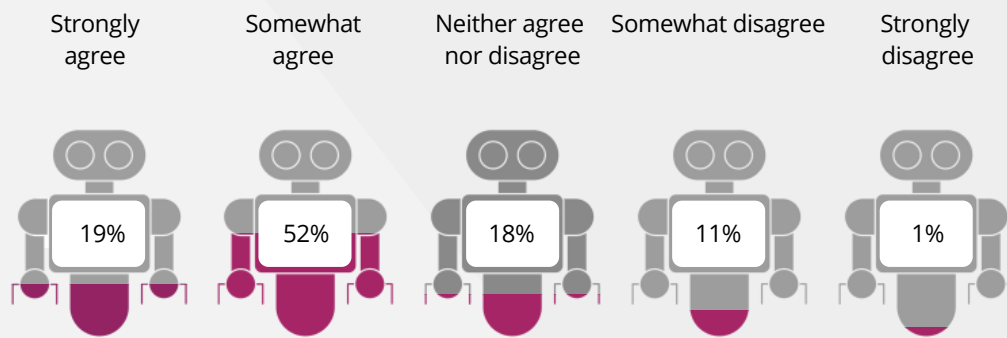
While the range of technological tools at the disposal of public affairs professionals has never been broader, individuals working in this field still find that in-person communications remain the most effective approach for connecting with external interlocutors. Asked which tools they consider key for their organization's successful engagement with external stakeholders, **98%** of respondents note in-person meetings and **79%** mention in-person events. Virtual meetings, however, are here to stay and are mentioned as a critical tool by **56%** of respondents. Together with direct emails (**59%**) and LinkedIn (**42%**), they complete the top five most-used tools for engagement by public affairs professionals in Europe.

Which of the following tools do you consider as the most critical for your organization's successful engagement with external stakeholders?



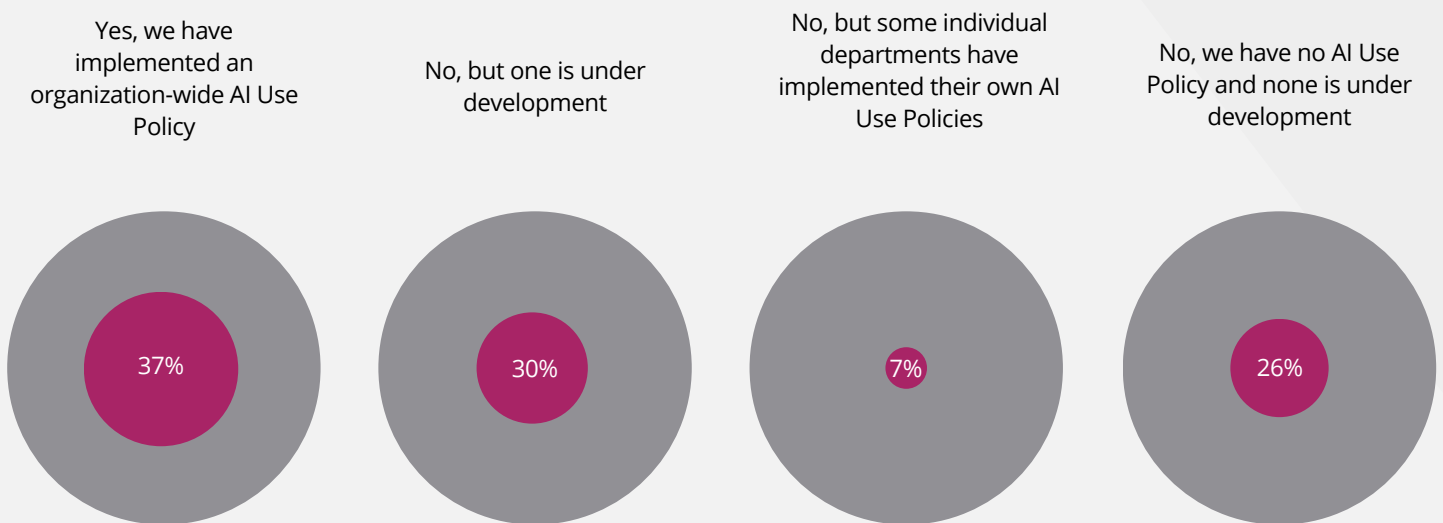
Public affairs professionals are increasingly optimistic about the integration of artificial intelligence (AI) in the function. Among survey respondents, **70%** "strongly agree" or "somewhat agree" with the statement that "AI tools will be adopted by a majority of European organizations for their public affairs and communication work within the next 12 months" — compared to **46%** who held similar beliefs last year.

To what extent do you agree with the following statement: "Artificial Intelligence (AI) tools will be adopted by a majority of European organizations for their public affairs and communication work within the next 12 months.?"



Despite the optimism, attitudes diverge when it comes to the adoption of AI tools and processes internally. Among survey respondents, **37%** report their organization has implemented an organization-wide AI use policy, while **26%** say their organization has no such policy and none is under development. When it comes to AI tools, almost half of respondents use Open AI's ChatGPT once per week or more, while **19%** report having never used it. The tool remains the top choice among respondents for their public affairs and communication work (**69%**), followed by Microsoft's Copilot (**36%**) and Google's Gemini (**15%**). Five percent (**5%**) say they use their organization's own internally developed AI tool.

#### Does your organization have an AI Use Policy?



#### Key takeaways:

- ★ In-person engagement (including meetings and events) is still considered the most effective way to engage with stakeholders.
- ★ LinkedIn is the social media platform of choice, while the use of Twitter/X has declined.
- ★ ChatGPT is the AI tool of choice, followed by Copilot and Gemini.
- ★ European public affairs professionals are optimistic about AI adoption in the next year, although the current level of adoption is fragmented and uneven.

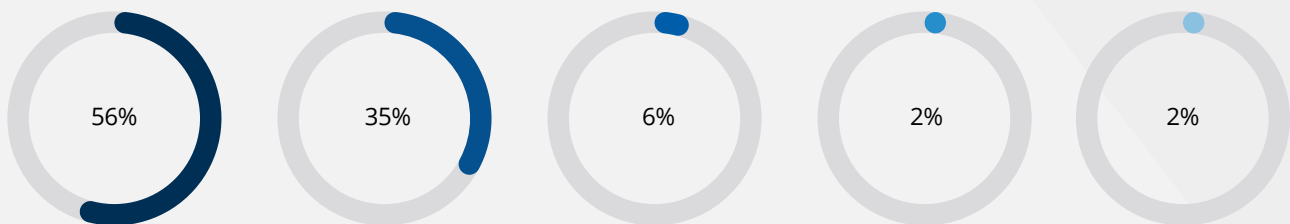
## Sustainability & ESG Criteria

Sustainability and ESG (Environmental, Social and Governance) criteria remain a high priority for public affairs teams in Europe. Among survey respondents, **90%** agree or somewhat agree their organizations are facing rising public expectations and increasing regulations related to these issues in the EU. This topic is widely seen as very important (**59%**) or moderately important (**33%**) by public affairs professionals when engaging with EU policy-makers. The large majority of respondents (**87%**) report their organization is committed to sustainability and ESG and sees them as a policy priority for the 12 months ahead.

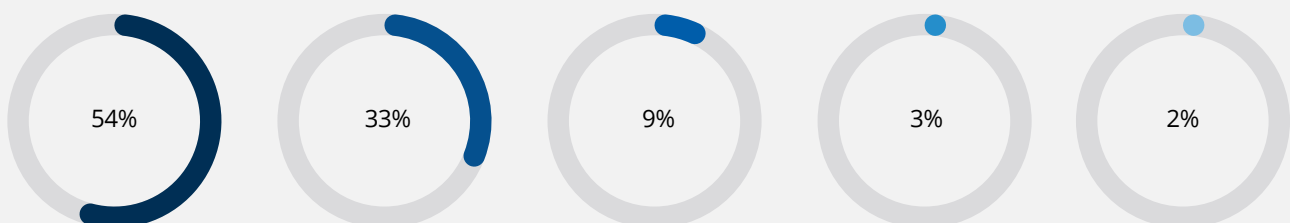
Although the importance of sustainability and ESG remains high on European public affairs agendas, these results reflect a slight decrease compared to our 2023 survey when an overwhelming **97%** reported seeing rising public expectations and increasing regulations in the EU.



To what extent do you agree with the following statement: "My organisation sees sustainability and ESG criteria (Environmental, Social and Governance) as areas where we are facing rising public expectations and increasing regulations in the EU."?

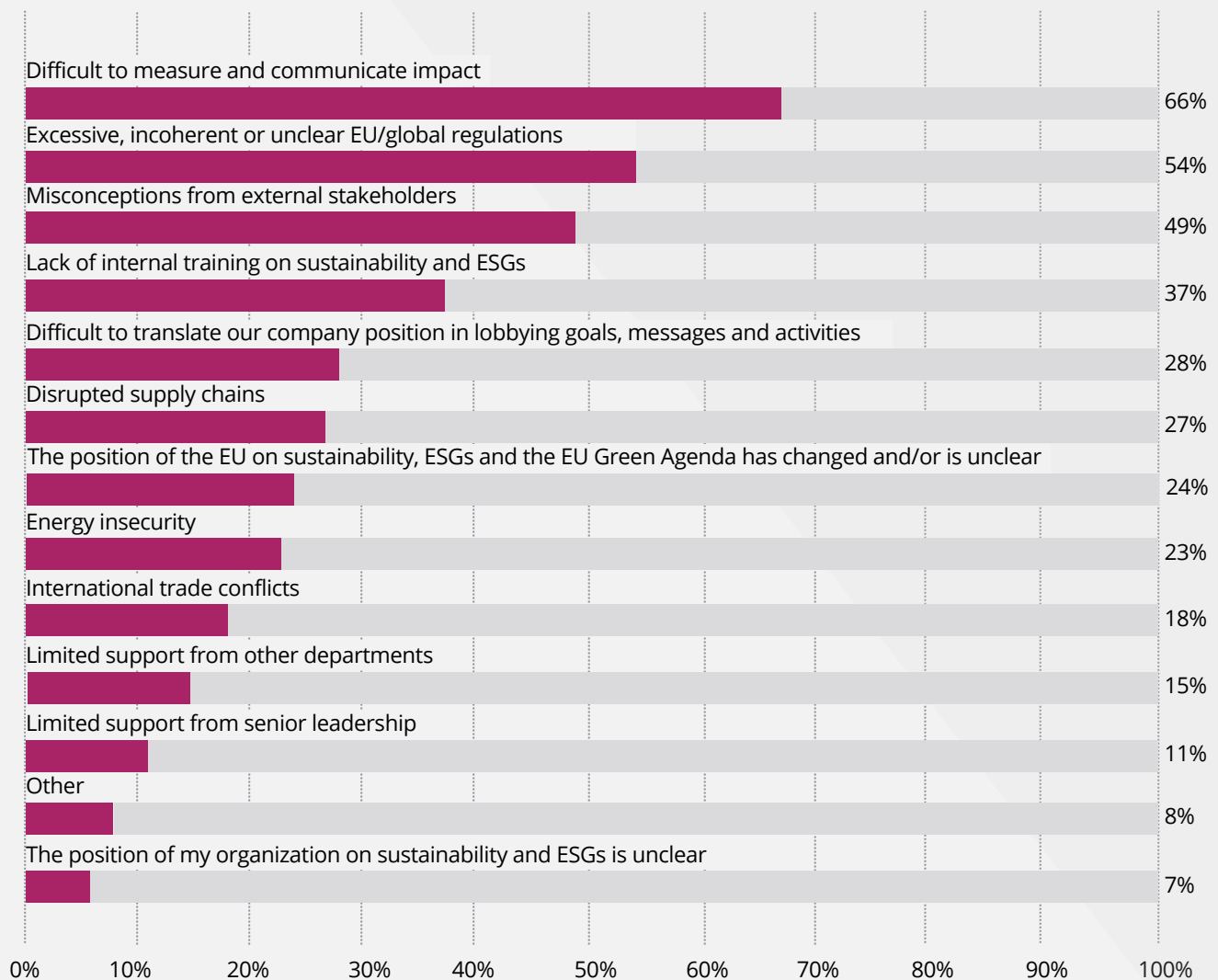


To what extent do you agree with the following statement: "My organisation is committed to sustainability and ESG, and sees it as a policy priority for the 12 months ahead."?



Public affairs professionals report facing internal and external challenges in their sustainability and ESG-work. Chiefly among them is the "difficulty to measure and communicate impact," which is identified as critical by **66%** of respondents, followed by "excessive, incoherent or unclear EU/global regulations" (**54%**) and "misconceptions from external stakeholders" (**49%**). The "lack of internal training on sustainability and ESG" (**37%**) and the "difficulty to translate our company position in lobbying goals, messages and activities" (**28%**) are also among the top five challenges for many European public affairs professionals.

## What do you consider to be some of the biggest challenges public affairs teams face when it comes to sustainability and ESG-related issues in the EU?



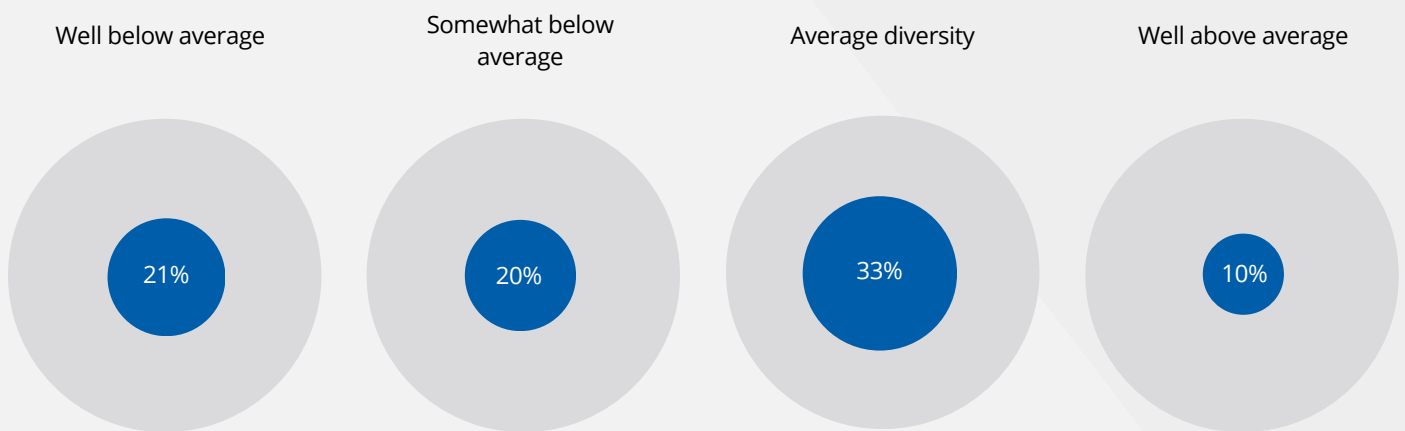
### Key takeaways:

- ★ Public affairs professionals continue to face high expectations from governments and the public, even if there has been a slight decrease in 2024 compared to 2023.
- ★ Sustainability and ESG remain a priority for organizations and their public affairs teams in Europe.
- ★ Key challenges faced by public affairs teams working in this area include the difficulty of measuring impact, external misconceptions, and excessive or unclear EU regulations.

## Diversity, Equity, and Inclusion (DEI)

The European public affairs community has diverging perceptions about the diversity of the profession. While **33%** of survey respondents consider it in line with the market as a whole, the largest group of respondents (**40%**) has a negative perception of the profession's diversity, considering it to be "somewhat below average" (**20%**) or "well below average" (**21%**). While these figures represent a slight improvement in comparison to our 2023 survey, when **29%** considered the profession's diversity to be in line with that of the market as a whole and **44%** considered it to be "well below average" or "somewhat below average," the profession still a long way to go when it comes to fostering a more diverse community in Europe.

**How would you describe the diversity of the public affairs profession in the country where you are based when compared to its labor market as a whole?**



Adopting diversity, equity and Inclusion (DEI) best practices is not just the right thing to do, it also brings important benefits for organizations. According to survey respondents, integrating DEI best practices within organizations empowers public affairs functions, among others, to be more culturally sensitive when advocating on difficult issues (for **62%** of respondents), establish stronger relationships with stakeholders (**46%**), improve problem-solving and innovation (**39%**), have more credibility among policy-makers (**38%**), and improve the organization's reputation (**36%**). Among survey respondents, **63%** are aware of plans by their organizations to incorporate DEI considerations into strategic planning, either through formal organization-wide plans, or through ad-hoc initiatives.

### Key takeaways:

- ★ Diversity perceptions are mixed, with many still seeing the profession's diversity as below average.
- ★ Even if perceptions have slightly improved since 2023, much remains to be done on the path towards a more diverse and inclusive profession.
- ★ DEI is widely seen as bringing key benefits for organizations, including culturally sensitive advocacy activities, stronger relationships, and enhanced credibility.



## Methodology

The 2024 *Trends in European Public Affairs* survey was completed by 120 European public affairs professionals between July and September 2024. Participants come from a wide range of organisations, including large corporations, consulting firms, trade associations, and civil society organizations. This report provides a detailed look into the current trends, priorities, and challenges facing public affairs professionals across Europe.

## About the Public Affairs Council

Both nonpartisan and nonpolitical, the Public Affairs Council is the leading association for public affairs professionals worldwide, with offices in Washington, D.C., and Brussels. The Council's mission is to advance the field of public affairs and to provide its 750 member companies and associations with the executive education and expertise they need to succeed while maintaining the highest ethical standards. Learn more about the Council and its European activities at [pac.org/europe](https://pac.org/europe).



Public Affairs Council

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