



EUROPEAN DIGITAL ADVOCACY TRENDS

A SURVEY ON THE USE OF DIGITAL TOOLS AND METHODS
BY EU PUBLIC AFFAIRS PRACTITIONERS

2017



Public Affairs Council

MANAGE YOUR WORLD

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Published by:



Public Affairs Council

The Public Affairs Council

2121 K St. N.W., Suite 900 - Washington, DC 20037, U.S.A.

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Limehive specializes in digital strategy applied to public affairs and corporate communications.

www.limehive.eu

INTRODUCTION

Digital advocacy – defined as the use of digital tools and methods to support the practice of public affairs – is now nearing ubiquity amongst EU public affairs functions.

We are witnessing a growing maturity and professionalization of digital advocacy, indicated by the number of dedicated senior digital professionals, the breadth of tools being used successfully, and the extent to which practitioners believe they are meeting their strategic objectives. However, well over a decade after digital advocacy first kicked off in the EU, we are still facing many familiar challenges, including the time intensive nature of being active online, resourcing and how to measure with conviction.

These themes and others were explored in *Digital Advocacy Trends in 2017*, a survey conducted by the Public Affairs Council, supported by Limehive.



KEY FINDINGS AND INSIGHTS

Digital advocacy is popular and on the rise: 90% of respondents use digital tools and methods.



Many respondents have dedicated digital staff, including 31% who have senior digital communications staff members; and 65% of respondents will increase their digital budgets in the next year or two.

Most respondents still focus on basic communications objectives, such as visibility and awareness raising, rather than specific public affairs outcomes like policy change (although +50% still cite the latter as important).

The breadth of objectives cited by respondents indicates that **most organisations retain a very broad scope for their digital communications efforts**, rather than focusing narrowly, which might be advisable given the relatively limited amount of time and resources they are able to dedicate (8 hours weekly split across 4 people on average).



While measurement remains a challenge, and most respondents still track relatively unusable vanity metrics like website traffic and social media followers or shares, many now track **qualitative metrics (44%)** and a reasonable number track genuinely important outcomes like perception change and policy impact (28% and 32% respectively).

Only 1% of respondents feel they are not meeting their strategic objectives, which implies that organisations are setting realistic objectives and are becoming proficient at executing against them. However, **54% of respondents feel they only partly meet their objectives**, which indicates plenty of room for improvement.



Traditional online channels like websites and email are seen to be the most effective, which makes sense given the flexibility and control they offer. Twitter and LinkedIn are still very popular, with Facebook still some way behind, presumably as it is not seen as a suitable channel for the corporate/technical issues dealt with in EU public affairs.

Short form formats are more popular than longer form ones, implying that **most practitioners view the web as a means to provide concise and digestible content, rather than detailed and technical material** – which is perhaps somewhat surprising, given the highly technical nature of many dossiers in Brussels.



Respondents still face the familiar challenges we have heard about over many years in digital advocacy, like effective measurement, dedicating sufficient time, and the ability to narrow target key audiences.

METHODOLOGY

The Public Affairs Council sent questionnaires to EU-based public affairs professionals working at companies and trade associations. A total of 165 usable responses were received.

The median values presented throughout this report are stated separately for each line item.

The medians, taken together, do not represent the profile of any individual company.



FINDINGS

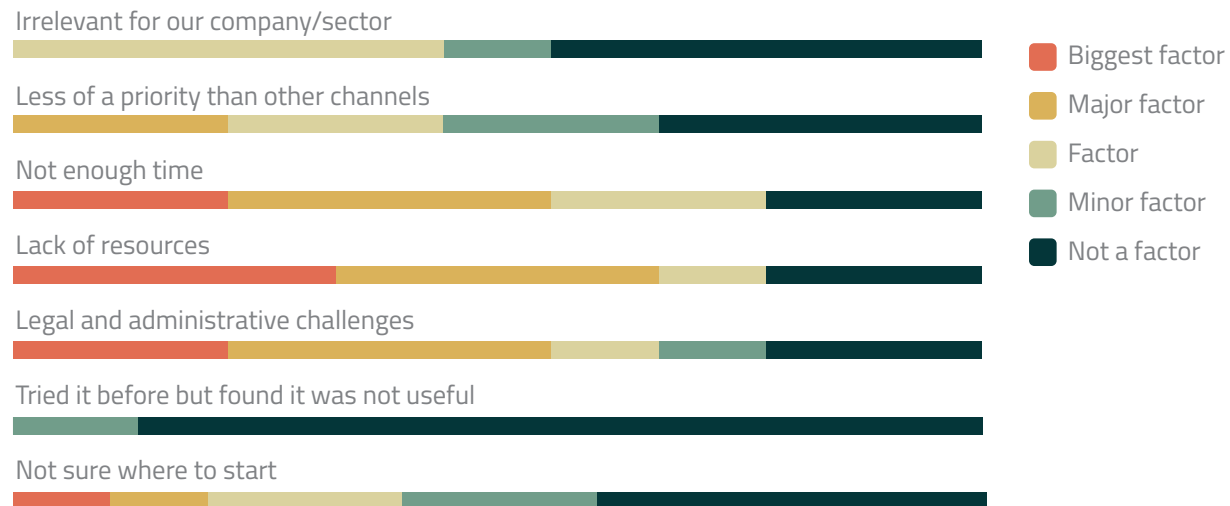
» Do you use digital communications tools to support your advocacy efforts?

(Digital communication tools include websites, social media, email newsletters etc.)



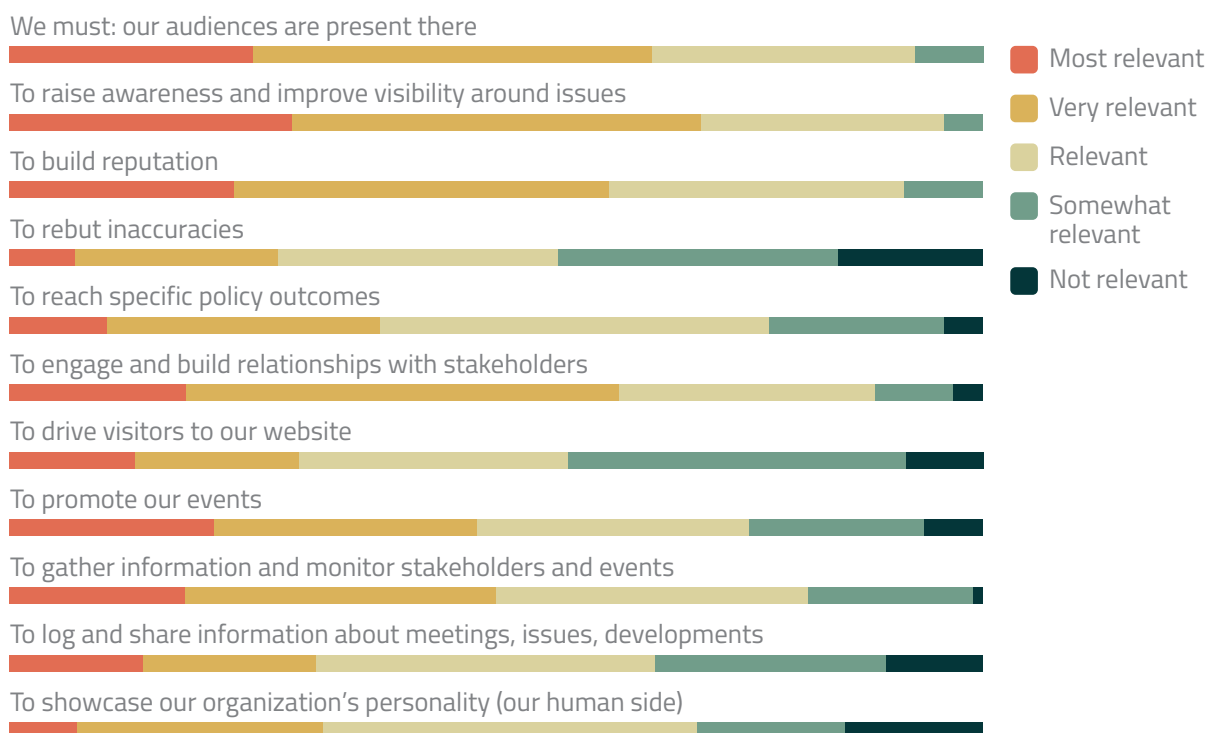
While respondents to this survey are more likely to be active online, it is fair to say that digital advocacy methods are almost ubiquitous amongst EU public affairs professionals, although the percentage of active users (90%) has remained static over the past two years (89% in 2015).

» Rate why you choose not to use digital communications tools



The number of respondents is not statistically relevant. Nonetheless, it is interesting to note that respondents who do not engage in digital advocacy mainly cite practical reasons (not enough time / lack of resources / legal and administrative challenges) rather than scepticism about the value of digital advocacy.

» Why do you use digital communications tools? How relevant to you are the following reasons?



- > The reasons for engaging in digital advocacy were fairly evenly matched across the board.
- > While differences were very slight, it should be noted that basic awareness raising and simply being present online because audiences are there featured most highly. This would imply that most organisations' digital advocacy strategies are still fairly generic, aimed at imparting information rather than more specific outcomes, like opinion shifts, supporter mobilisation or coalition building.
- > Using online tools to gather intelligence also featured highly, which is positive. In the past, we noted that public affairs practitioners were captivated by the execution temptation and were ignoring how digital can help understand stakeholders and improve efficiencies, but this has changed.
- > Interestingly, relatively fewer respondents cited specific policy goals as key, implying again that digital tools are still largely valued for their role in raising visibility or building a specific narrative. This makes sense given the nature of Brussels, where specific policy work is often done in traditional settings like working groups and trilogues.
- > Rebutting inaccuracies and showcasing 'personality' were less popular objectives, which is curious given that corporations often fret about the online activities of civil society organisations, who excel at telling impactful real-life stories and are sometimes accused of utilising questionable data to support their positions. Yet respondents would appear to undervalue how digital could be used for corporate storytelling or rebuttal purposes.

» Are you meeting your objectives?

■ Yes ■ Partly ■ No

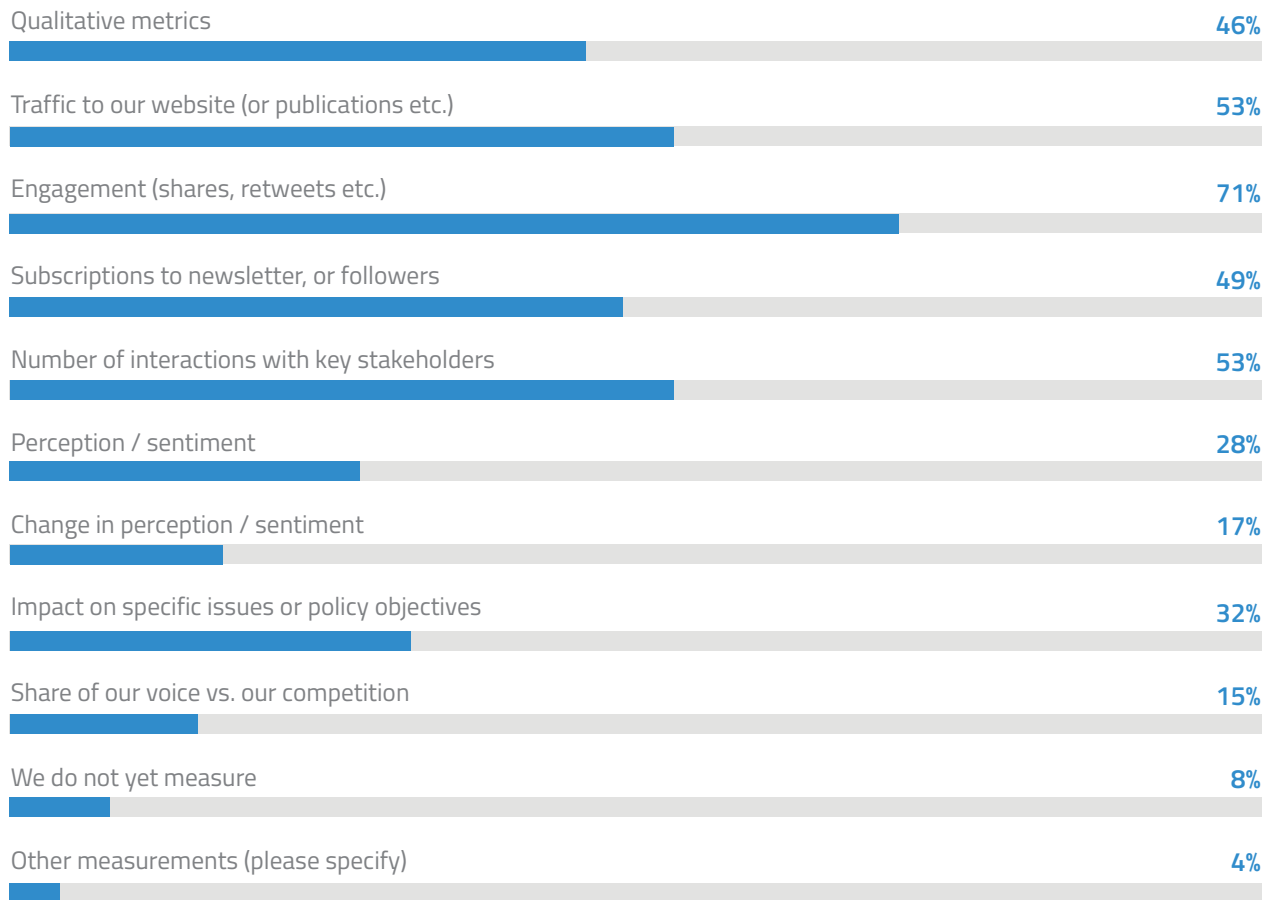


Far more respondents believe they partly or fully meet their objectives compared to 2015. This implies two things: users are becoming more adept at using digital tools and methods; and just as important, they are setting more realistic goals for what might be achieved online. However, the fact that over half of respondent believe that they do not fully meet their objectives would indicate that there is still substantial work to be done in setting suitable goals, developing the right strategies for success and acquiring the right digital skills.

SAMPLE OF RESPONDENT COMMENTS:

- “ An online presence automatically gives a campaign a “presence/focal point” which then enhances all future communication plans.
- “ Digital is a moving target. We are always recalibrating as what worked last year may no longer work this year.
- “ We have to take into account the changing regulatory environment, particularly the advent of the GDPR.
- “ We successfully engage with policy-makers and build connections with civil society and various experts, but have more limited success in raising awareness amongst the general public.
- “ The conversations that we are in are driven by people from outside the industry. Only 0.3% of the online conversation is driven by people associated with industry - this makes it hard.
- “ We are a large organisation and our digital efforts still need some refining to ensure we are reaching the right people at the right time.
- “ Getting effective at local level with local languages is always a challenge.

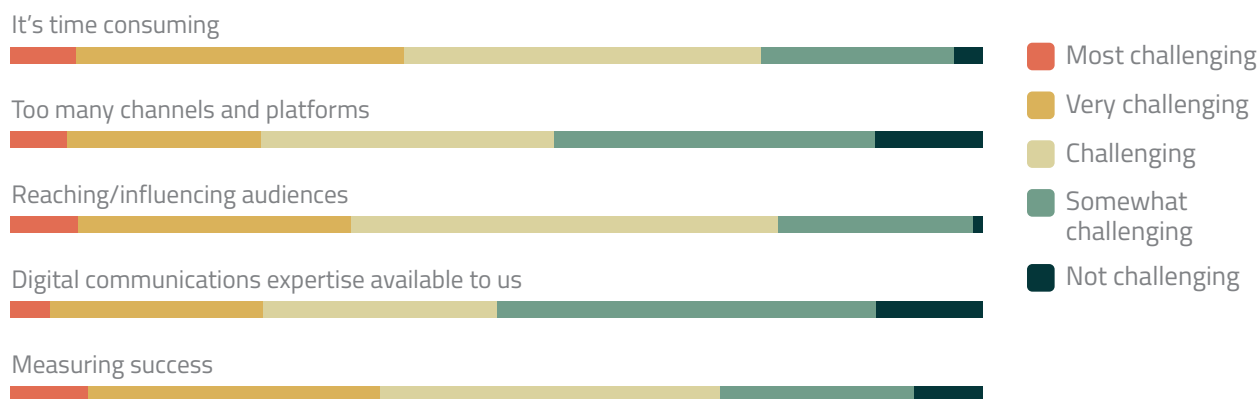
» How do you measure your digital communication efforts?



Measurement has always been cited as a key challenge of digital advocacy. On a positive note, only 8% of respondents claim not to measure. Moreover, almost half of our respondents track qualitative metrics, e.g. best performing content, which is helpful in determining what works vs. what does not and to improve future performance. A majority of respondents measure so-called vanity metrics like traffic and engagement (e.g. shares and likes), which have some value in determining progress, but do not by themselves indicate whether an organisation is meeting its objectives. Outcome related metrics like perception change and impact on policy are measured less than they probably should be, presumably because they are the more difficult results to capture.

**ALMOST HALF OF
RESPONDENTS TRACK
QUALITATIVE METRICS**

» What are the challenges of your digital communications efforts?

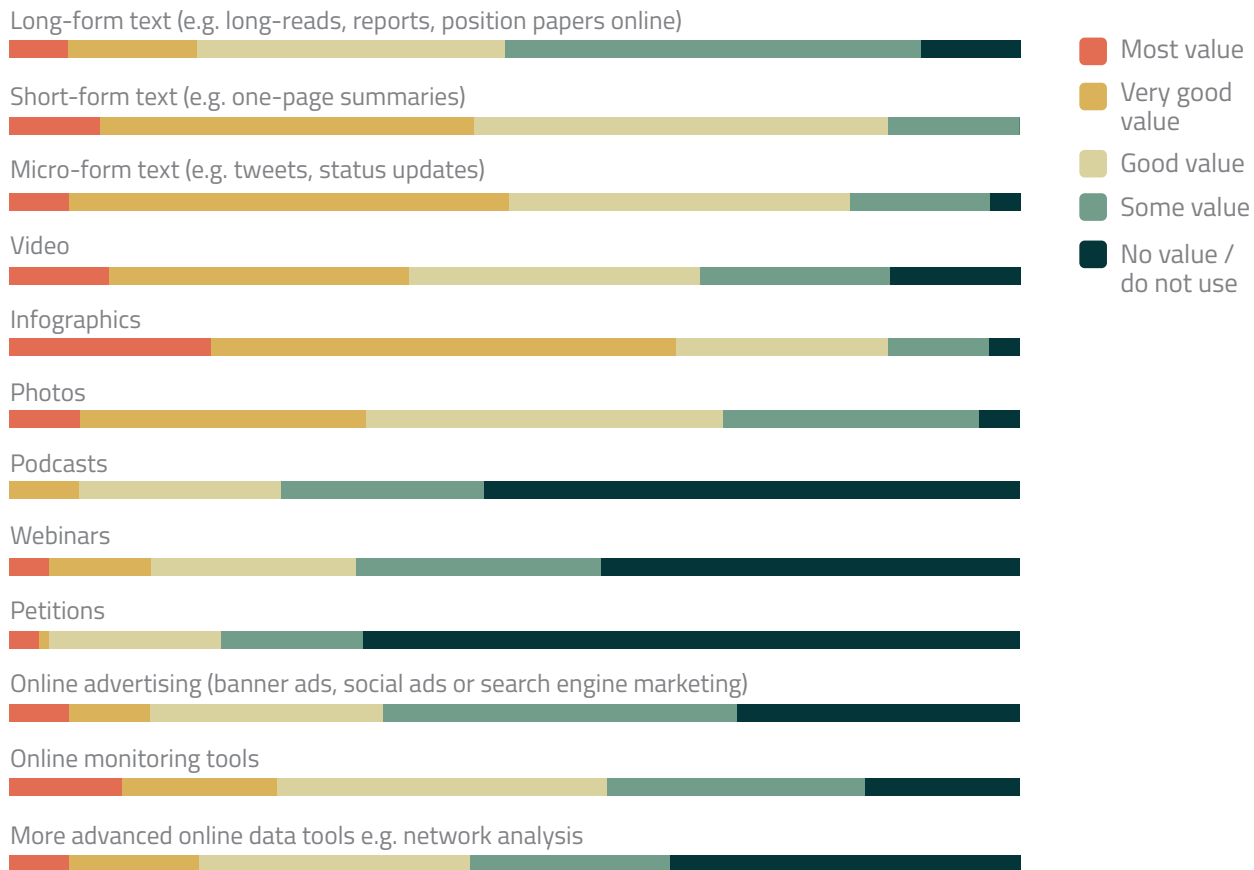


All the possible reasons listed were selected by most respondents as being at least somewhat challenging, indicating that most users probably feel they are not yet mastering digital advocacy. In particular, the amount of time it can take, ensuring reach, and measurement represent genuine challenges for most. Digital expertise placed slightly lower, implying that improving digital skills and the presence of more genuine digital experts is having positive results.

SAMPLE OF RESPONDENT COMMENTS:

- “ There is never an ‘end point’. There is always a new angle, new objective... This is increasingly hard to manage.
- “ We need to get out of the rationale of “doing it because everybody does it.”
- “ Main challenge is that only a proportion of target audiences (policy makers) use digital channels.
- “ Social media would be a lot easier if everyone used it in the same way!
- “ Resource issues for content creation and on-demand conversations.

» Rate the value each digital communications format or tool brings you:

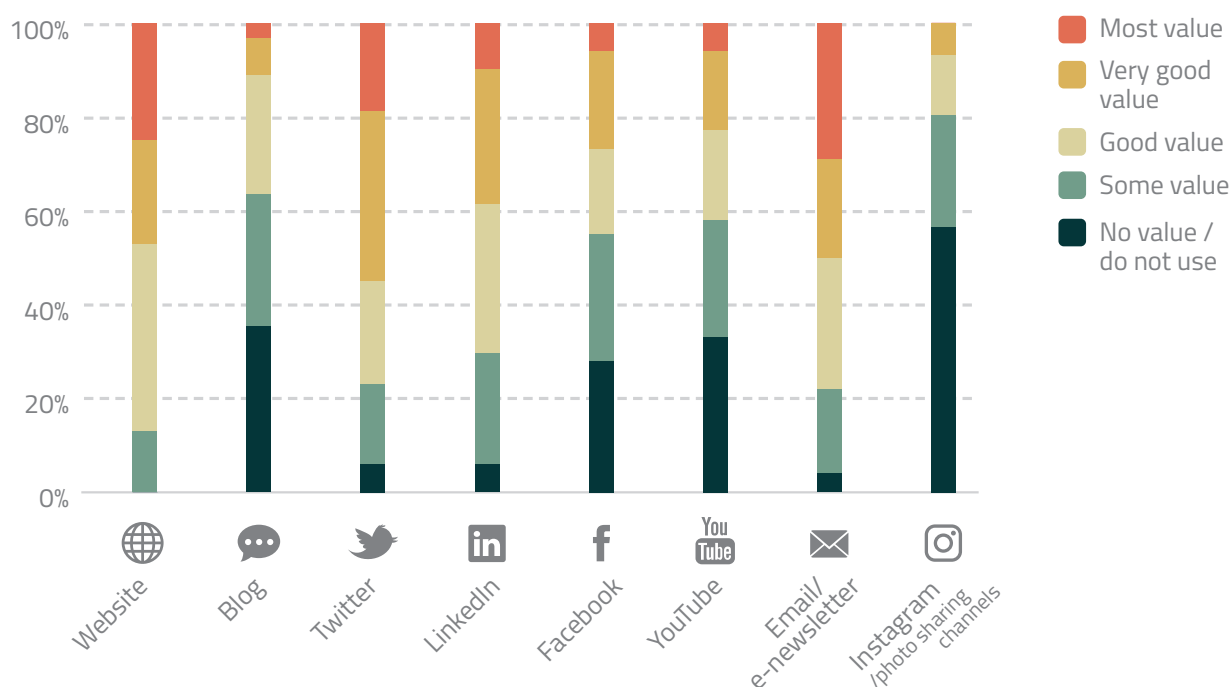


- › Formats that encourage short and digestible information provision, such as short- and micro-form text and infographics are most popular. This indicates that digital advocacy is valued most highly for its ability to distil complex subjects and deliver concise information.
- › It is perhaps surprising that long-form content is relatively unpopular, given the technical nature of many EU dossiers and the many experts involved, who presumably would value deeper insights than tweets and infographics can realistically deliver.
- › Likewise, online advertising is less popular than might be expected, given how cost-effective

it can be in driving highly targeted traffic to one's content. Presumably the low scores are reflective of mistrust in advertising and/or lack of knowledge regarding how the tools work.

- › Podcasts, which are increasingly omnipresent outside EU circles because of how easy they are to produce and to consume on the move, are not valued highly by respondents, presumably because of a shortage of early adopters rather than weaknesses in the channel itself.
- › The least valued format is the petition, which is probably seen more as an activist rather than a corporate tool, although petitions have been used with some success by the latter.

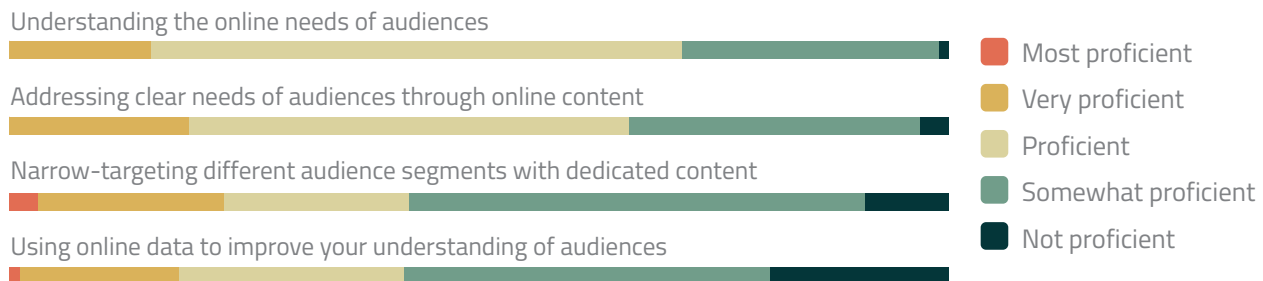
» Rate the value each digital communications channel brings you:



- › ‘Traditional’ online channels - websites and email newsletters - are thought to provide the most value. This is no surprise, given the flexibility and control they offer, and the extent to which social media is increasingly saturated, making it difficult to get one’s message through.
- › Having said that, Twitter is still considered valuable, as is LinkedIn. Given various recent feature changes in the latter, including LinkedIn articles and more targeted advertising options, we suspect LinkedIn may grow even more in popularity in time.
- › The demise of the blog is perhaps surprising, but may be considered in line with the relative unpopularity of long-form content, i.e. short-form, concise content provision is preferred by most. NB: some respondents will likely have blog features on their websites (e.g. in news sections) but will not strictly-speaking consider it a blog.
- › YouTube and photo sharing channels like Instagram are not seen as especially valuable, which is perhaps surprising, given that video and photos were cited as popular formats in the previous question. Perhaps this indicates that users are increasingly using the native video/photo features on other channels like LinkedIn and Twitter, or uploaded straight to their websites, rather than using video and photo services.

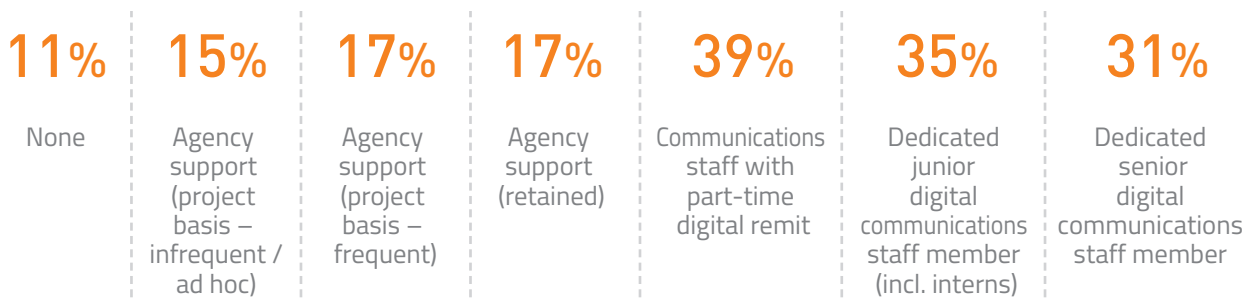
“TRADITIONAL” ONLINE CHANNELS - WEBSITES AND EMAIL NEWSLETTERS - ARE THOUGHT TO PROVIDE THE MOST VALUE.

» How proficient do you believe you are at targeting your audiences?



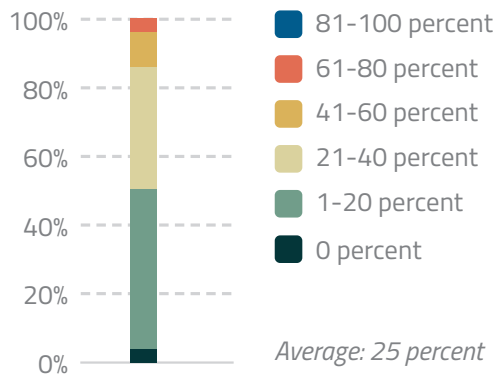
Targeting of audiences is frequently cited as a major challenge online, with many users admitting that they adopt a 'spray and pray' approach. All our questions on audience targeting — around understanding their needs, using data to provide insights, and narrow-targeting — indicate that most respondents still feel they have work to do in order to become more proficient at understanding and targeting specific audiences. Roughly 15-20% of respondents do however feel they are very proficient across the board, while over half believe that they have a good understanding of their audience's needs, so the outlook looks positive. Future surveys will likely explore this area in more detail, to understand how respondents come to understand and address audience needs, given the discrepancy between the number who feel they know their audiences, and the number who use data to assess these same needs.

» What human resources do you have to support your digital communications efforts?



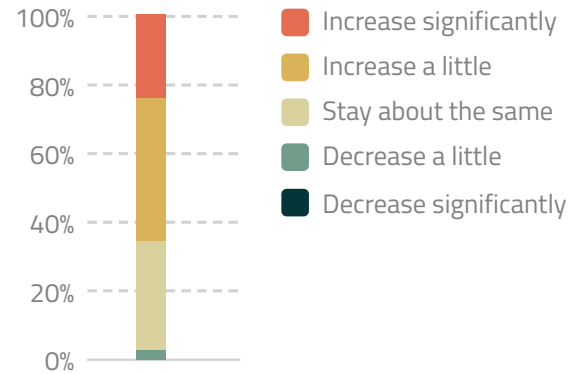
Dedicated digital advocacy resourcing is notable, especially in-house staff. Almost one-third of respondents have senior digital communications staff, and a further 35% and 39% have junior or part time digital staff respectively. Relatively few respondents utilise external support, which is in line with the general trend towards bringing digital communications in-house, or perhaps indicates that high-quality digital agency support is in short supply.

» Approximately what percentage of your total public affairs and communications budget do you spend on digital communications support?



Respondents spend an average of 25% of their total public affairs and communications budgets on digital communications support. This figure would appear to be quite high given the reluctance to bring in agency support on digital advocacy, and the fact that while many respondents have dedicated digital staff, many do not. Perhaps the figure is indicative of the time-consuming nature of digital advocacy.

» How is this percentage likely to change over the next year or two?



In line with the growing popularity of digital advocacy, as indicated by answers to previous questions, a majority of respondents (65%) will increase budget allocated to digital communications, while 31% will keep it at the same level. Perhaps most tellingly, no respondents will decrease their budgets significantly, and only 3% will do so a little.



» In a typical week, approximately how much time do you and your team spend on digital advocacy (managing social media, drafting content for online channels, etc.)?

In line with budget spent, the amount of time dedicated to digital advocacy is around 8 hours (20%) per week on average, spread across various team members.

» If you were to share any advice with an organization starting out in digital advocacy, what would it be?

Answered: 28

SAMPLE OF RESPONDENT COMMENTS:

- “ Have a clear campaign or end objective.
- “ Dedicate a full time expert or outsource it to a specialised consultant.
- “ Narrow your focus.
- “ Do not do it because others are doing it, but because you need it and you know what you need.
- “ Focus on quality rather than on quantity.
- “ It takes a lot of time and effort to do it properly.
- “ Look at where your audience is. Only engage digitally if the people you want to engage with are digitally active.
- “ Take time to evaluate their needs, and do not make content just for content's sake.
- “ Know what you want to achieve and measure against progress to that goal.
- “ Be creative, use visual content, research you stakeholders and audience, avoid technical language, connect with people emotionally, build networks/coalitions to strengthen your message, talk to people in person as much as possible.
- “ Don't underestimate it - launching is easy, maintaining the commitment and content is the challenge.
- “ Digital advocacy must be backed-up by a solid public affairs and communication's strategy. Don't just set up a social media profile for the sake of it.
- “ Be consistent.
- “ Get buy-in and support from all colleagues, not just those working on communications.
- “ Identify the key influencers in your area.
- “ Great value but you need to spend time in it to get that value out of it.
- “ Check first with your target audience (internal and external) to determine how to most effectively reach them.
- “ It's good to be “disruptive”, but if your sector is traditional perhaps moving too fast will negatively affect you!

TOPLINE RESULTS

Do you use digital communications tools to support your advocacy efforts?
(Digital communication tools include websites, social media, email newsletters etc.)

Yes No



Yes 89,70%

No 10,30%

Rate why you choose not to use digital communications tools

Irrelevant for our company/sector



Less of a priority than other channels



Not enough time



Lack of resources



Legal and administrative challenges



Tried it before but found it was not useful



Not sure where to start



Biggest factor

Major factor

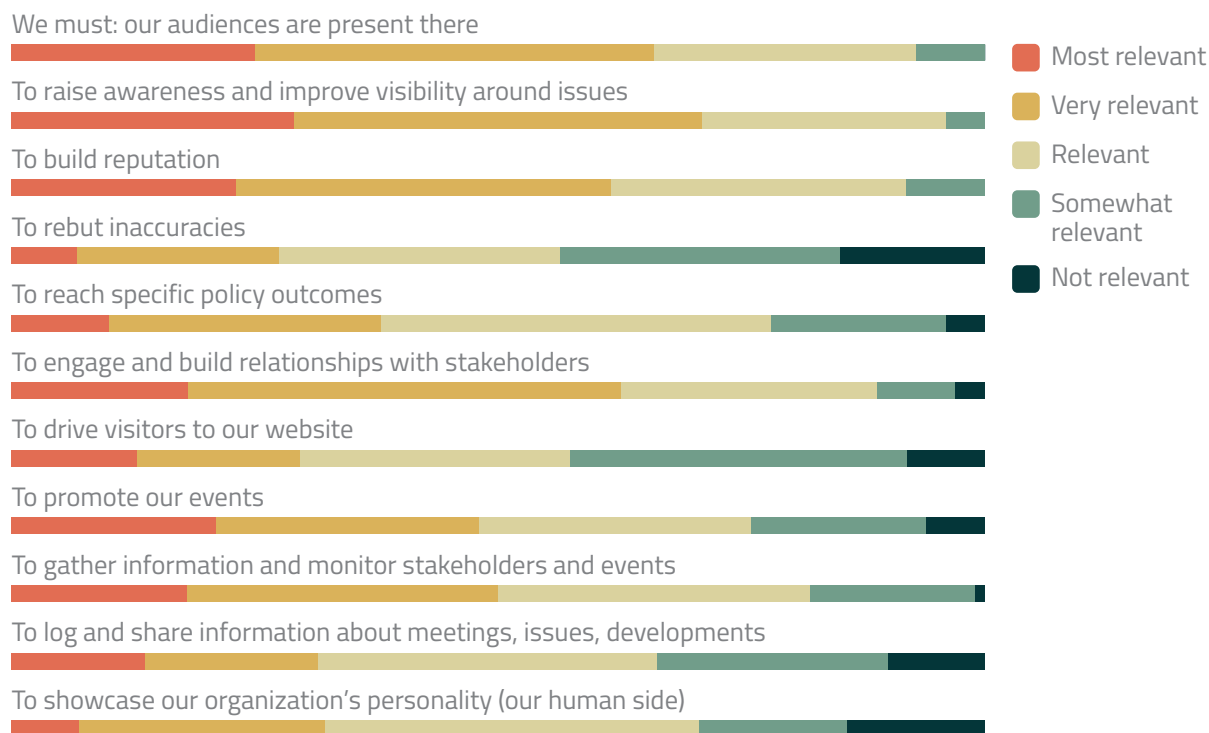
Factor

Minor factor

Not a factor

	Not a factor	Minor factor	Factor	Major factor	Biggest factor
Irrelevant for our company/sector	44%	11%	44%	0%	0%
Less of a priority than other channels	33%	22%	22%	22%	0%
Not enough time	22%	0%	22%	33%	22%
Lack of resources	22%	0%	11%	33%	33%
Legal and administrative challenges	22%	11%	11%	33%	22%
Tried it before but found it was not useful	88%	13%	0%	0%	0%
Not sure where to start	40%	20%	20%	10%	10%

Why do you use digital communications tools? How relevant to you are the following reasons?



	Not relevant	Somewhat relevant	Relevant	Very relevant	Most relevant
We must: our audiences are present there	0%	7%	27%	41%	25%
To raise awareness and improve visibility around issues	0%	4%	25%	42%	29%
To build reputation	0%	8%	30%	38%	23%
To rebut inaccuracies	15%	29%	29%	21%	7%
To reach specific policy outcomes	4%	18%	40%	28%	10%
To engage and build relationships with stakeholders	3%	8%	26%	44%	18%
To drive visitors to our website	8%	35%	28%	17%	13%
To promote our events	6%	18%	28%	27%	21%
To gather information and monitor stakeholders and events	1%	17%	32%	32%	18%
To log and share information about meetings, issues, developments	10%	24%	35%	18%	14%
To showcase our organization's personality (our human side)	14%	15%	38%	25%	7%

Are you meeting your objectives?

■ Yes ■ Partly ■ No

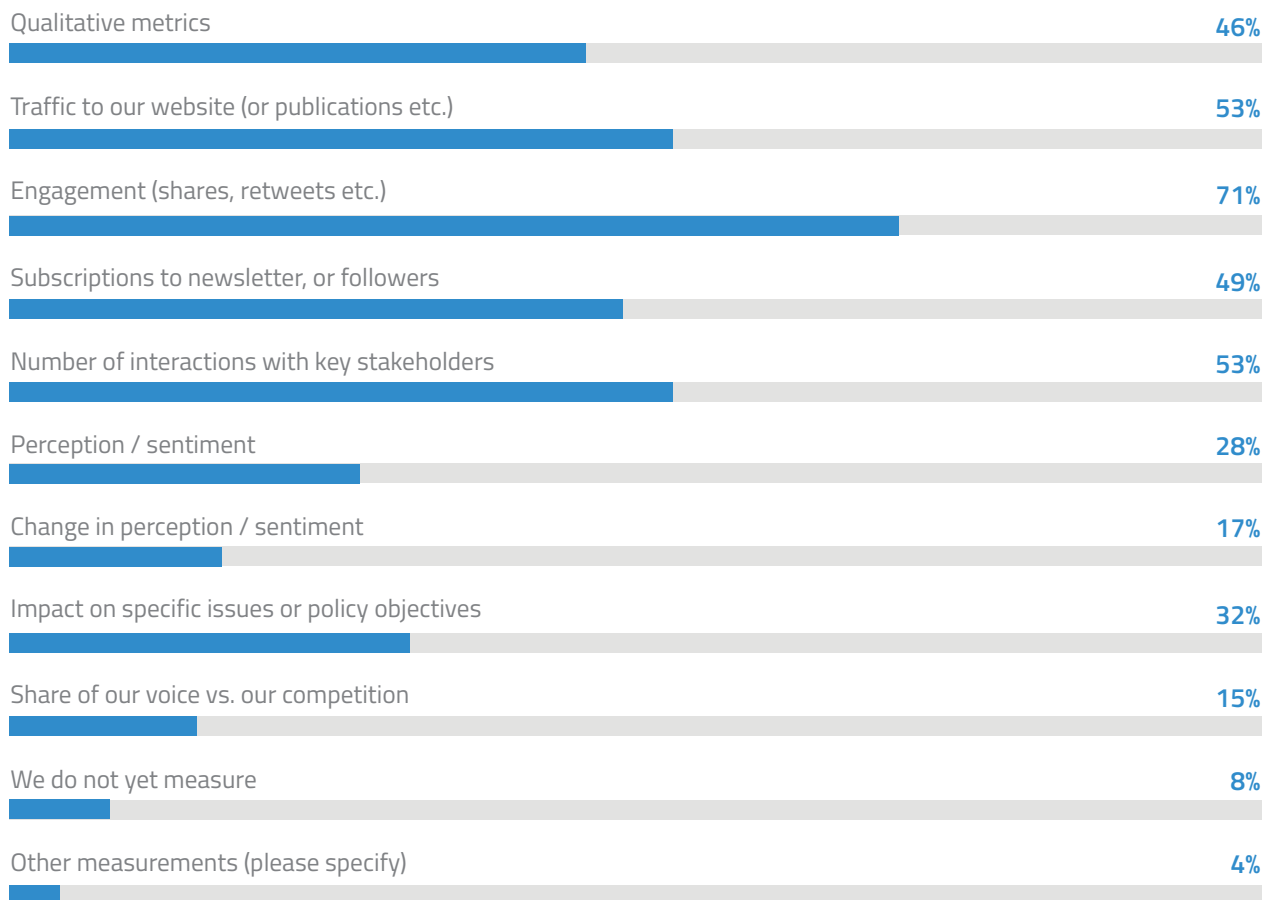


Yes 44%

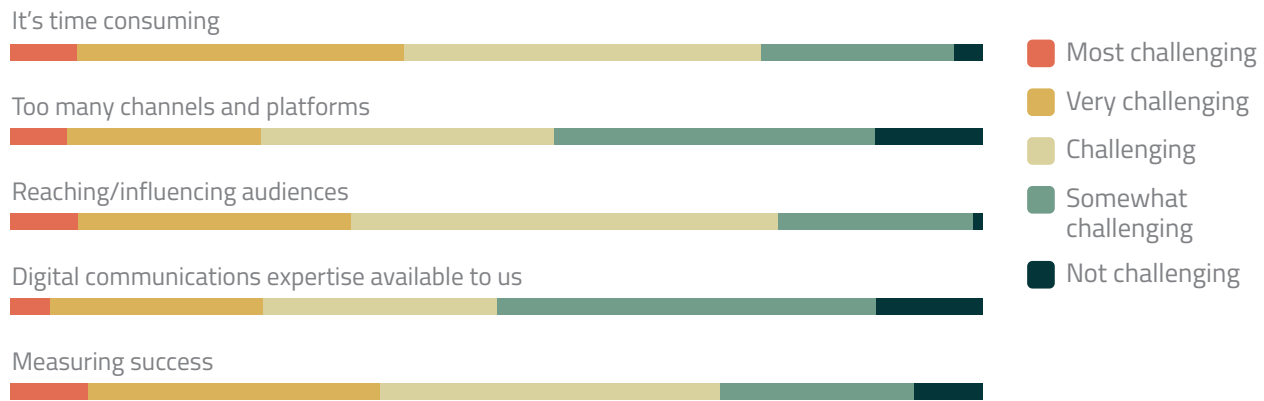
Partly 54%

No 1%

How do you measure your digital communication efforts?

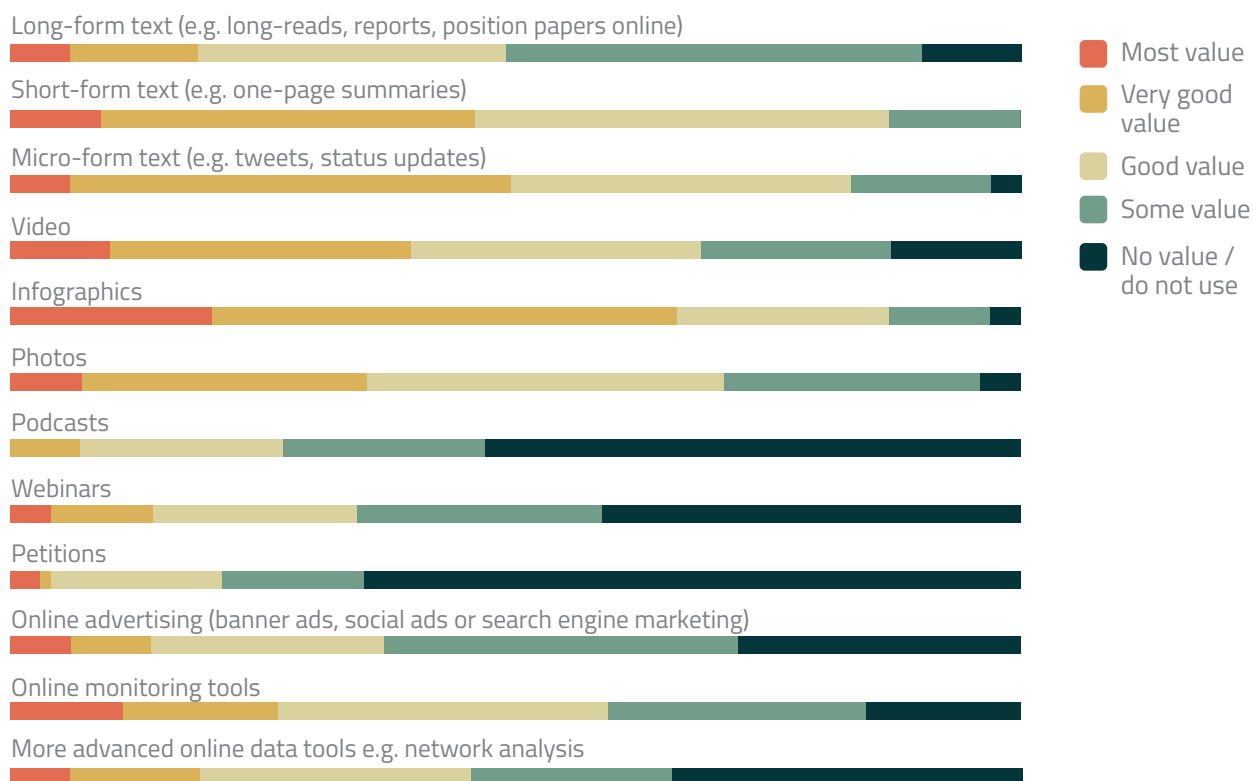


What are the challenges of your digital communications efforts?



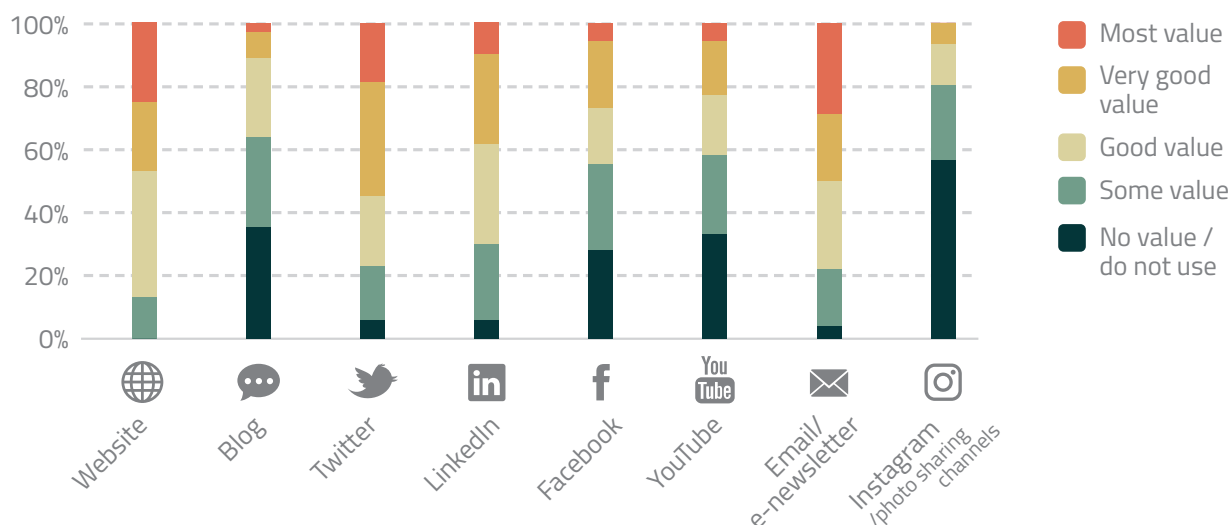
	Not challenging	Somewhat challenging	Challenging	Very challenging	Most challenging
It's time consuming	3%	20%	37%	34%	7%
Too many channels and platforms	11%	33%	30%	20%	6%
Reaching/influencing audiences	1%	20%	44%	28%	7%
Digital communications expertise available to us	11%	39%	24%	22%	4%
Measuring success	7%	20%	35%	30%	8%

Rate the value each digital communications format or tool brings you:



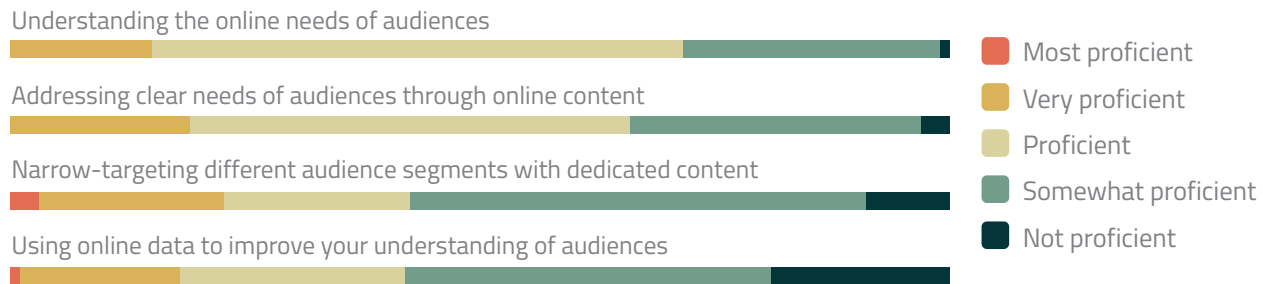
	No value / do not use	Some value	Good value	Very good value	Most value
Long-form text	10%	42%	31%	13%	6%
Short-form text (e.g. one-page summaries)	0%	13%	41%	37%	9%
Micro-form text	3%	14%	34%	44%	6%
Video	13%	19%	29%	30%	10%
Infographics	3%	10%	21%	46%	20%
Photos	4%	25%	35%	28%	7%
Podcasts	53%	20%	20%	7%	0%
Webinars	41%	24%	20%	10%	4%
Petitions	65%	14%	17%	1%	3%
Online advertising	28%	35%	23%	8%	6%
Online monitoring tools	15%	25%	32%	15%	11%
More advanced online data tools	35%	20%	27%	13%	6%

Rate the value each digital communications channel brings you:



	No value / do not use	Some value	Good value	Very good value	Most value
Website	0%	13%	40%	22%	25%
Blog	35%	28%	25%	8%	3%
Twitter	6%	17%	22%	36%	19%
LinkedIn	6%	24%	32%	29%	10%
Facebook	28%	27%	18%	21%	6%
YouTube	33%	25%	19%	17%	6%
Email/e-newsletter	4%	18%	28%	21%	29%
Instagram and other photo sharing channels	57%	24%	13%	7%	0%

How proficient do you believe you are at targeting your audiences?

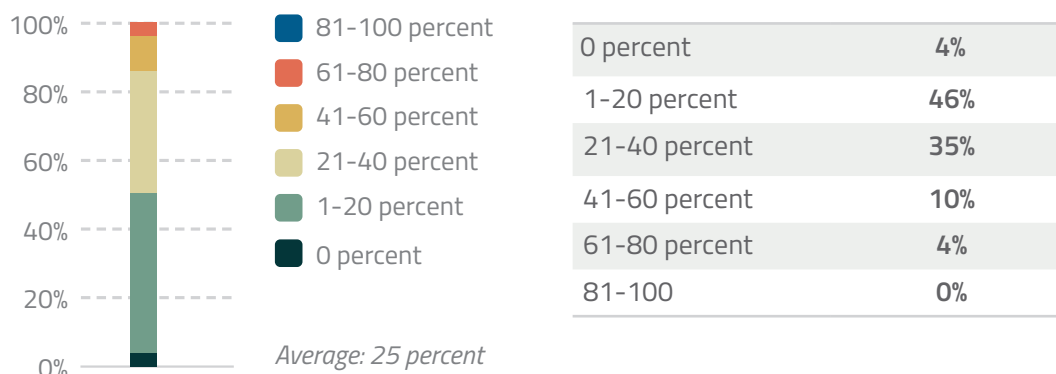


	Not proficient	Somewhat proficient	Proficient	Very proficient	Most proficient
Understanding the online needs of audiences	1%	27%	56%	15%	0%
Addressing clear needs of audiences through online content	3%	31%	47%	19%	0%
Narrow-targeting different audience segments with dedicated content	9%	49%	20%	20%	3%
Using online data to improve your understanding of audiences	19%	39%	24%	17%	1%

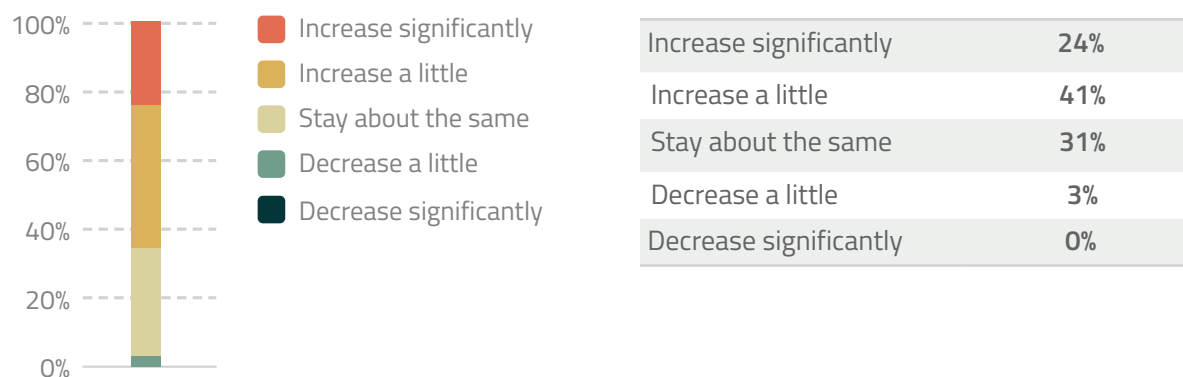
What human resources do you have to support your digital communications efforts?



Approximately what percentage of your total public affairs and communications budget do you spend on digital communications support?



How is this percentage likely to change over the next year or two?



In a typical week, approximately how much time do you and your team spend on digital advocacy (*managing social media, drafting content for online channels, etc.*)

	Average Number
Total number of hours per week that the whole team spends on these tasks	28
Number of people in the above team	4
Average hours per week that you spend on these tasks	8

If you were to share any advice with an organization starting out in digital advocacy, what would it be?

Answered: 28

SAMPLE OF RESPONDENT COMMENTS:

- “ Have a clear campaign or end objective.
- “ Dedicate a full time expert or outsource it to a specialised consultant.
- “ Narrow your focus.
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