



Capital Staffers Index

A Trans-Atlantic Analysis of Digital Media's Impact on Shaping Policy

November 4, 2009

Research methodology & objectives

StrategyOne surveyed 396 seniors staff members from key capitals in the U.S. and Europe to determine the perceived value of the Internet as a tool for policymakers to connect with local residents and communities; determine the credibility and trust associated with social media networks; and compare the Internet's influence on policymakers internationally.

The overall margin of error is $\pm 4.9\%$.

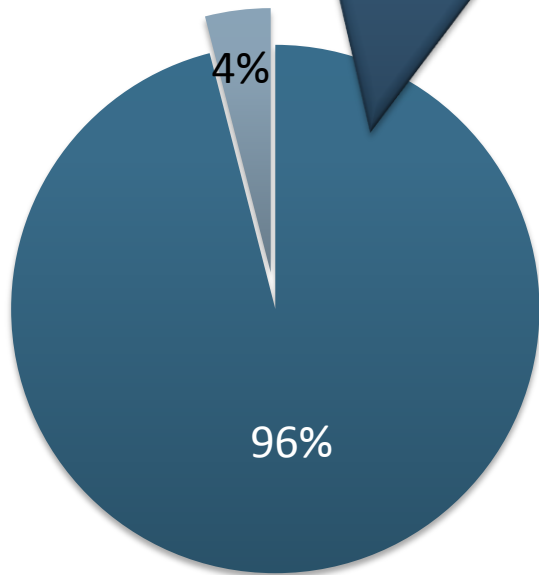
Capital City	Audience	N size	Data Collection Dates
Washington, DC, United States	U.S. Congressional staff	50	September 11-24, 2009
London, United Kingdom	U.K. Parliament staff	136	September 16-21, 2009
Brussels, European Union	EU Parliament staff	60	September 16-23, 2009
Paris, France	French Assembly staff	100	September 23-October 16, 2009
Berlin, Germany	Bundestag staff	50	September 15-24, 2009



Executive Summary

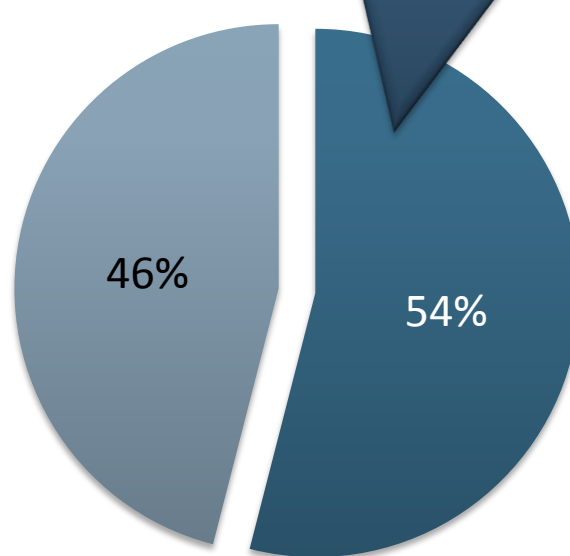
Online sources play a key role in informing and shaping policy positions

Nearly every staffer uses online resources for public policy research



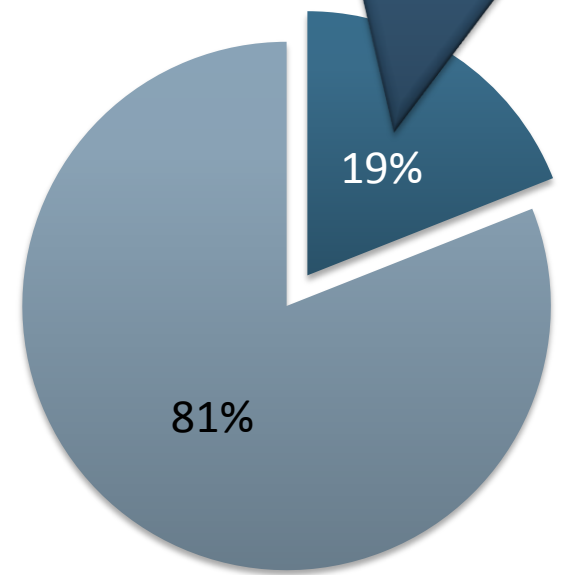
In the last 30 days, have you used online information sources to research a policy issue?
(96% "Yes", 4% "No")

Over half of all staffers have first learned about a policy issue online



In the last 30 days, have you learned about a public policy issue for the first time online?
(54% "Yes", 46% "No" or "Unsure")

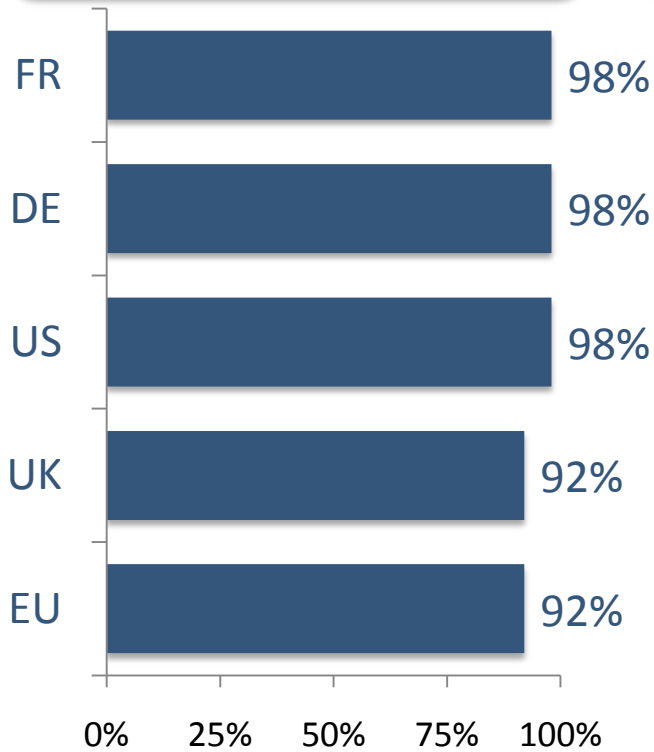
One in five staffers have changed a policy position based on online sources



In the last 30 days, have you changed your position on a policy issue, based on something you read online? (19% "Yes", 81% "No" or "Unsure")

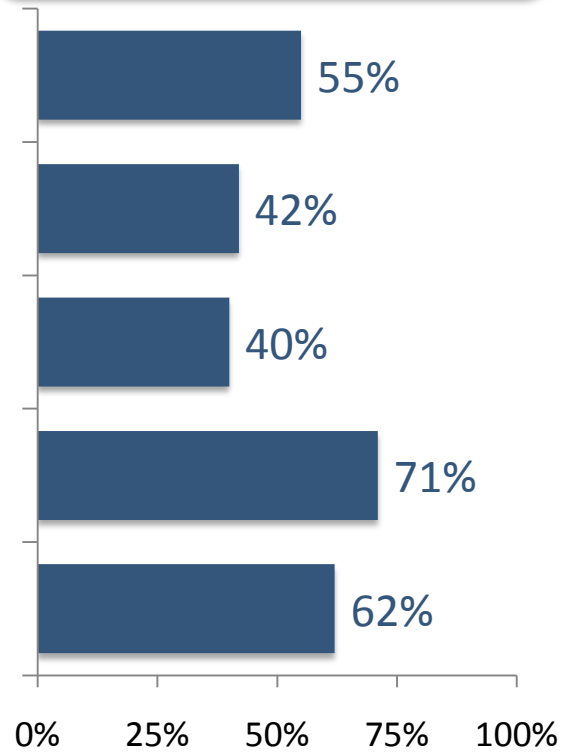
Online sources: A regional breakdown

Nearly every staffer uses online resources for public policy research



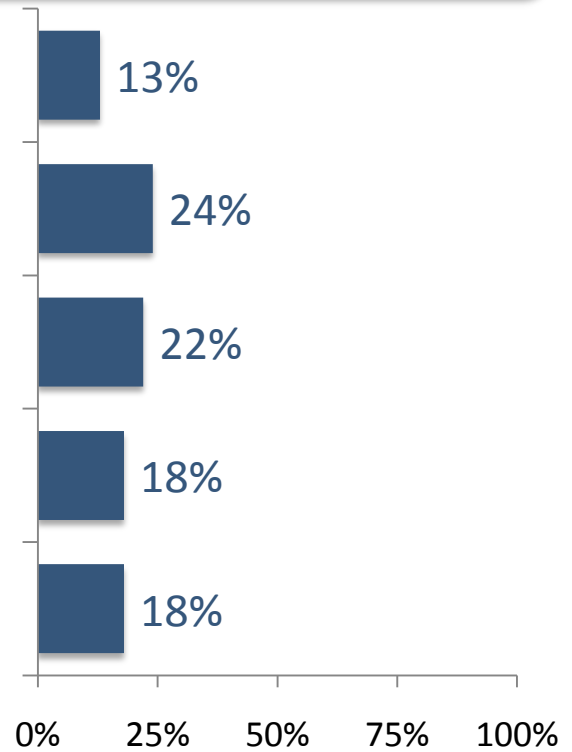
In the last 30 days, have you used online information sources to research a policy issue?
(% Yes)

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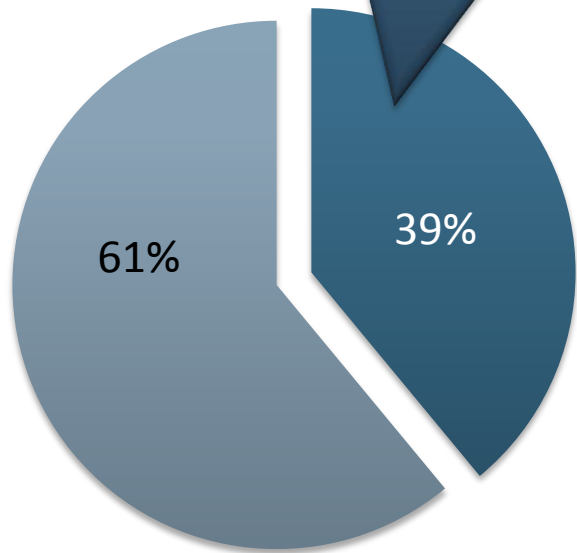
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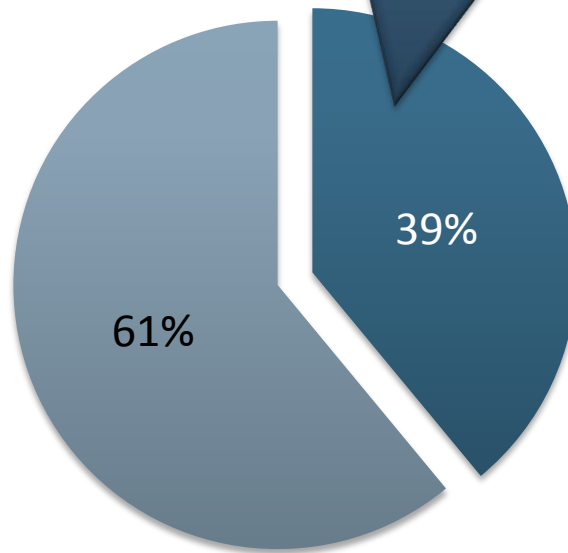
Blogs are becoming mainstream

39% have used blogs and other social media to monitor policy news



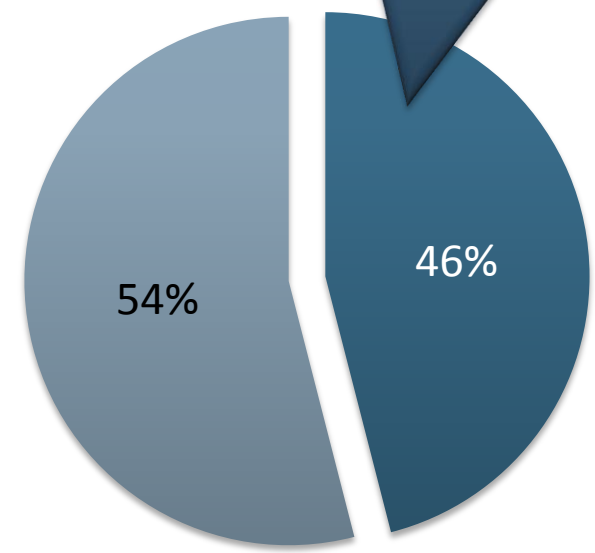
In the last 30 days, have you used social media sites such as blogs, Twitter or Facebook to monitor news about a policy issue? (39% "Yes", 61% "No" or "Unsure")

And the same number have used them to monitor policy opinion



Used social media sites such as blogs, Twitter or Facebook to monitor opinion about a policy issue? (39% "Yes", 61% "No" or "Unsure")

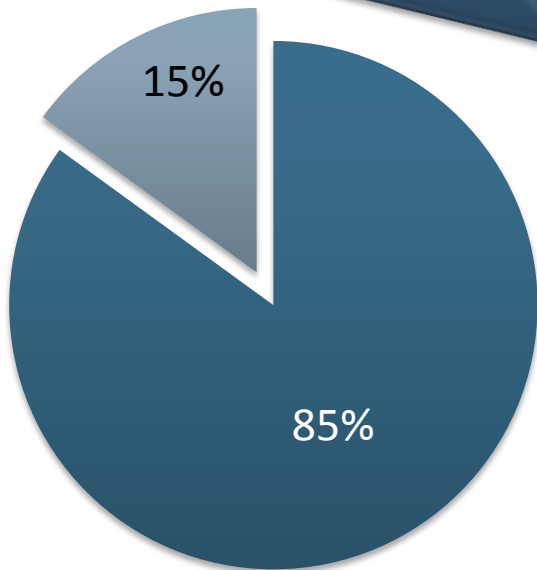
Nearly half see blogging as an effective way to reach constituents



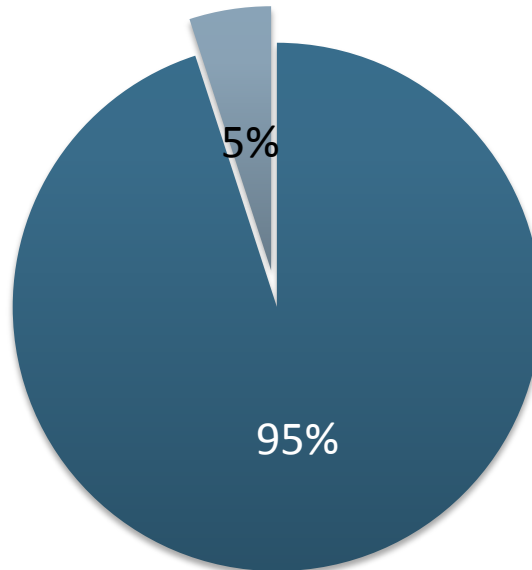
How effective do you believe blogging is in communicating to constituents? (46% "Effective," 42% "Not Effective," 15% "Don't Know")

“Face time” is critical, online and off

Staffers overwhelmingly see face-to-face meetings as effective constituent advocacy channels for both inbound and outbound communications

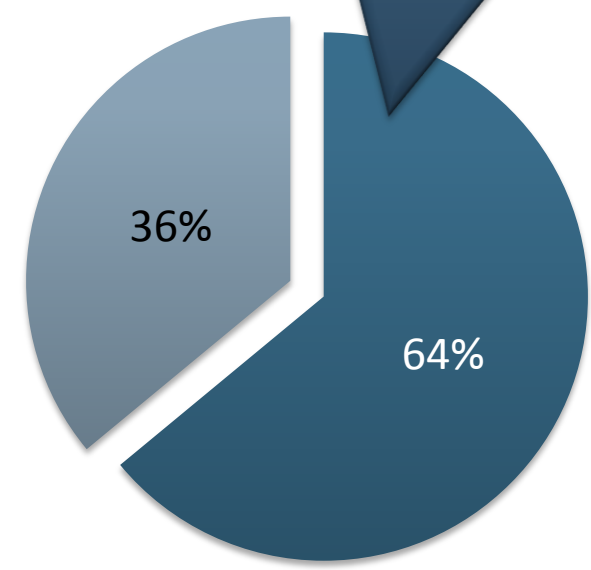


When constituents contact your member, how effective are in-person visits? (85% “Effective”, 10% “Not Effective”, 5% “Unsure”)



How effective do you believe one-on-one meetings to be in communicating to constituents? (95% “Effective”, 3% “Not Effective”, 2% “Unsure”)

Two in three staffers are using Facebook as a proxy for face-to-face communication



How, if at all, do you use Facebook? (64% Total Use, 36% “Do Not Use At All”)

While policy framing is still dominated by traditional media outlets, many dedicated online sources are beginning to emerge



What are the top online information sources that you trust for policy analysis?

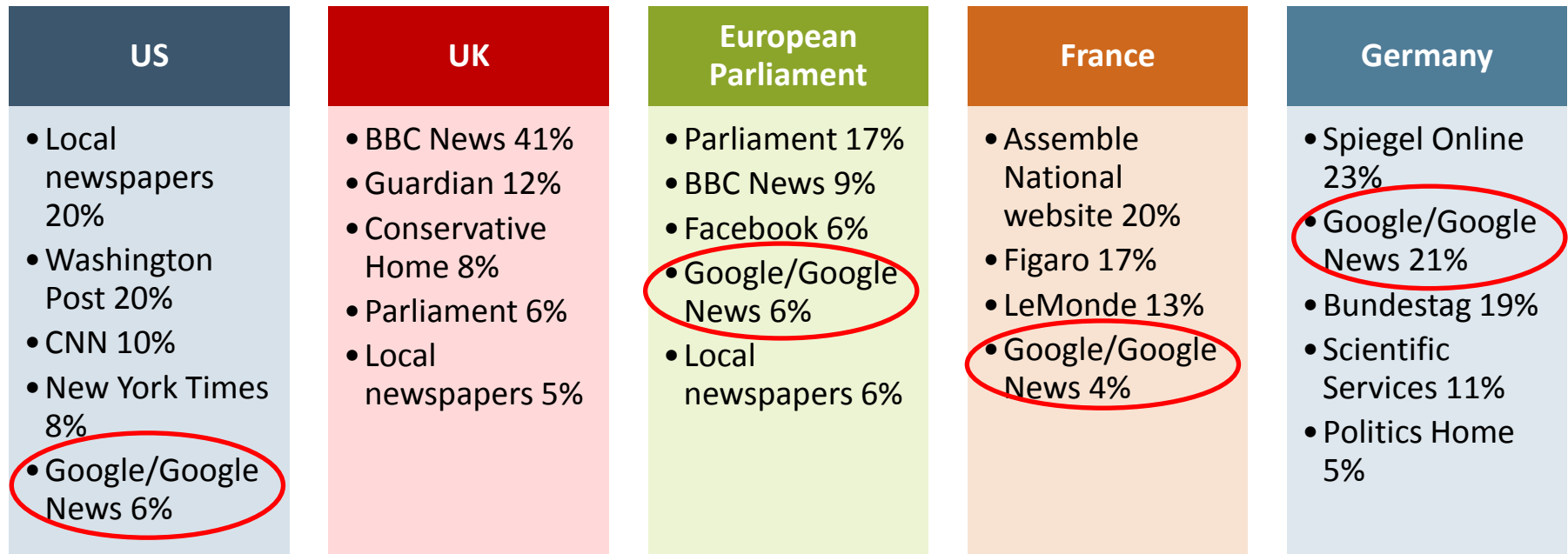
All politics....and digital media is local

Google/Google News is the only online information source mentioned by respondents in all countries

US	UK	European Parliament	France	Germany
Washington Post 17%	BBC/BBC News 19%	EurActive 11%	LeMonde 18%	Bundestag site 19%
New York Times 13%	Guardian 13%	Blogs 7%	Figaro 15%	Newspapers 18%
Congressional Research Service 13%	House of Commons library 9%	BBC/BBC News 4%	Liberation 10%	News Ticker 15%
Roll Call 9%	New York Times 5%	ConHome 4%	AFP 7%	Spiegel online 14%
Politico 8%	ConHome 5%	Newspapers 4%	Assemblée 5%	Google news/Google 10%
CQ 6%	Party briefings 4%	Politics Home 4%	Rue89 5%	Party briefings 8%
Party briefings 4%	Newspapers 4%	Financial Times 3%	Famous French 4%	Blogs 3%
Wall Street Journal 4%	Politics Home 3%	Google news/Google 3%	Journeaux 4%	Economist 1%
Newspapers 3%	Financial Times 3%	Economist 3%	Mediapart 4%	
Google news/Google 2%	Parliament 3%	Think Tanks 3%	Quotidens 4%	
Google news/Google 2%	Google news/Google 2%	Google news/Google 3%	Google news/Google 1%	Google news/Google 10%

What are the top online information sources that you trust for policy analysis?

Aside from checking your email, typically what is the first website that you visit in the morning?



Digital impact and utilization rankings

**Congressional, EU
Parliamentary and Bundestag
staff lead in terms of digital
impact and utilization**

**Perceived effectiveness
of digital
communications**

**Staffer utilization of
digital communications
tools**



	Digital Communication Impact Ranking	Digital Communication Usage Ranking
US Congressional Staff	1 st	1 st
European Parliament Staff	2 nd	3 rd
German Bundestag Staff	3 rd	2 nd
French Assembly Staff	4 th	5 th
UK Parliament Staff	5 th	4 th

However, a gap has emerged; staffers' professional use of online communications channels lags their personal use

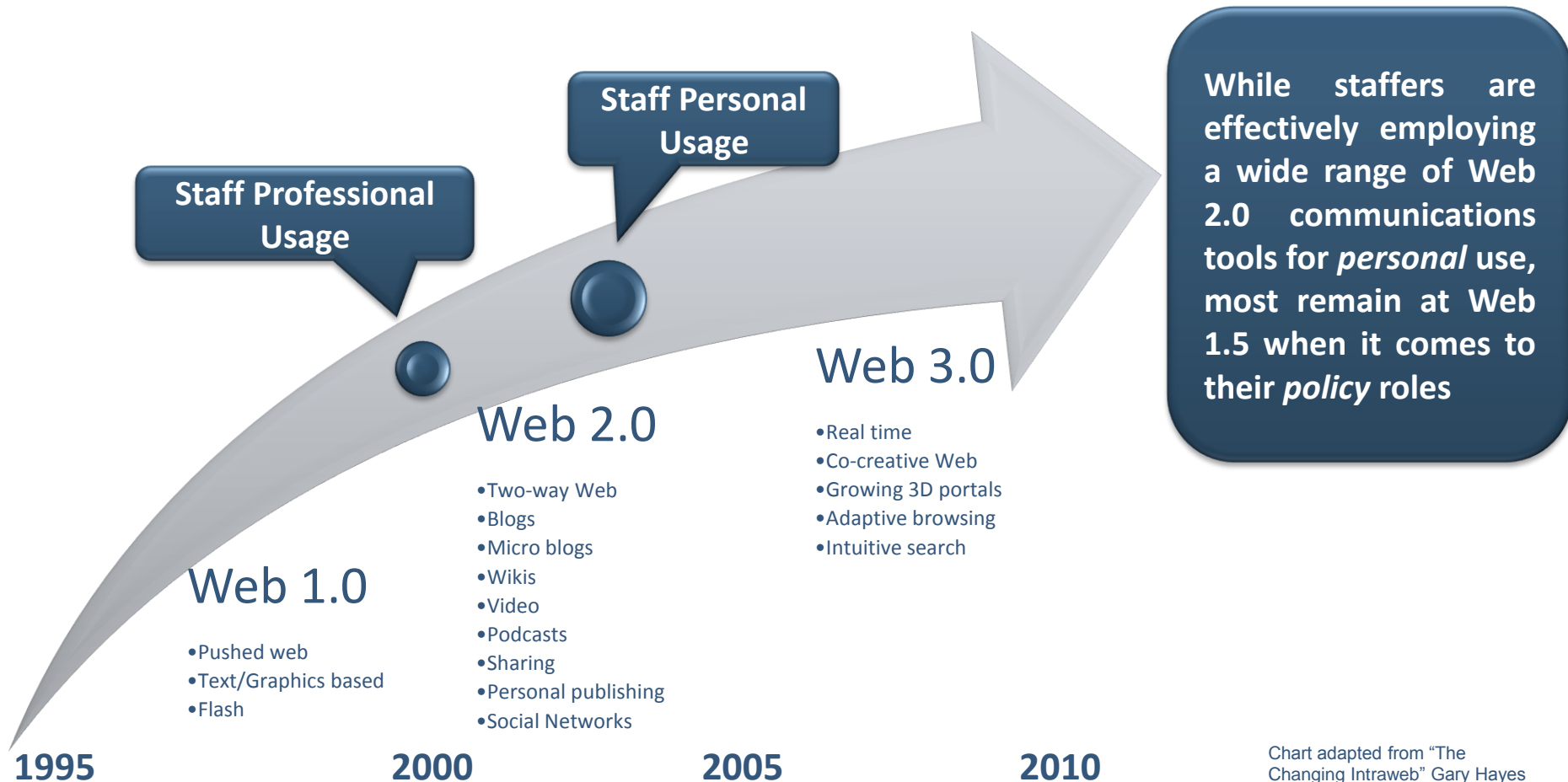


Chart adapted from "The Changing IntraWeb" Gary Hayes

There is a significant opportunity to help staffers better employ the social media tools they are already using

Do Not Use At All

36%



33%



80%

83%



83%



91%



Facebook

60%

28%

21%

9%

YouTube

52%

8%

18%

19%

Personal blog

12%

4%

7%

7%

Twitter

11%

5%

7%

4%

LinkedIn

13%

9%

12%

MySpace

8%

2%

1%

Personal Uses

Conecting with Colleagues

Communicating with Constituents

Researching Policy Issues

Personal

Professional

How, if at all, do you use the following tools?

Despite this divide, digital communications are playing a diverse and effective role in public affairs communication

	Reaching Constituents	% Effective
	One-on-one meetings	95%
✓	Television appearances	92%
✓	Speaking events	91%
✓	Newspaper columns	85%
✓	Radio appearances	85%
	Websites	82%
✓	Press releases	76%
	Television advertising	61%
	Print advertising	61%
✓	Op-Eds	60%
	Online videos	51%
	Blogging	46%
	Radio advertising	46%
	Online advertising	32%
	Micro blogging	22%

	Reaching Members	% Effective
	Written letters	90%
	Emails	87%
	One-on-one meetings	86%
	Telephone calls	85%
	Member's blog	31%
	Member's social network	22%
	Micro blogging	7%

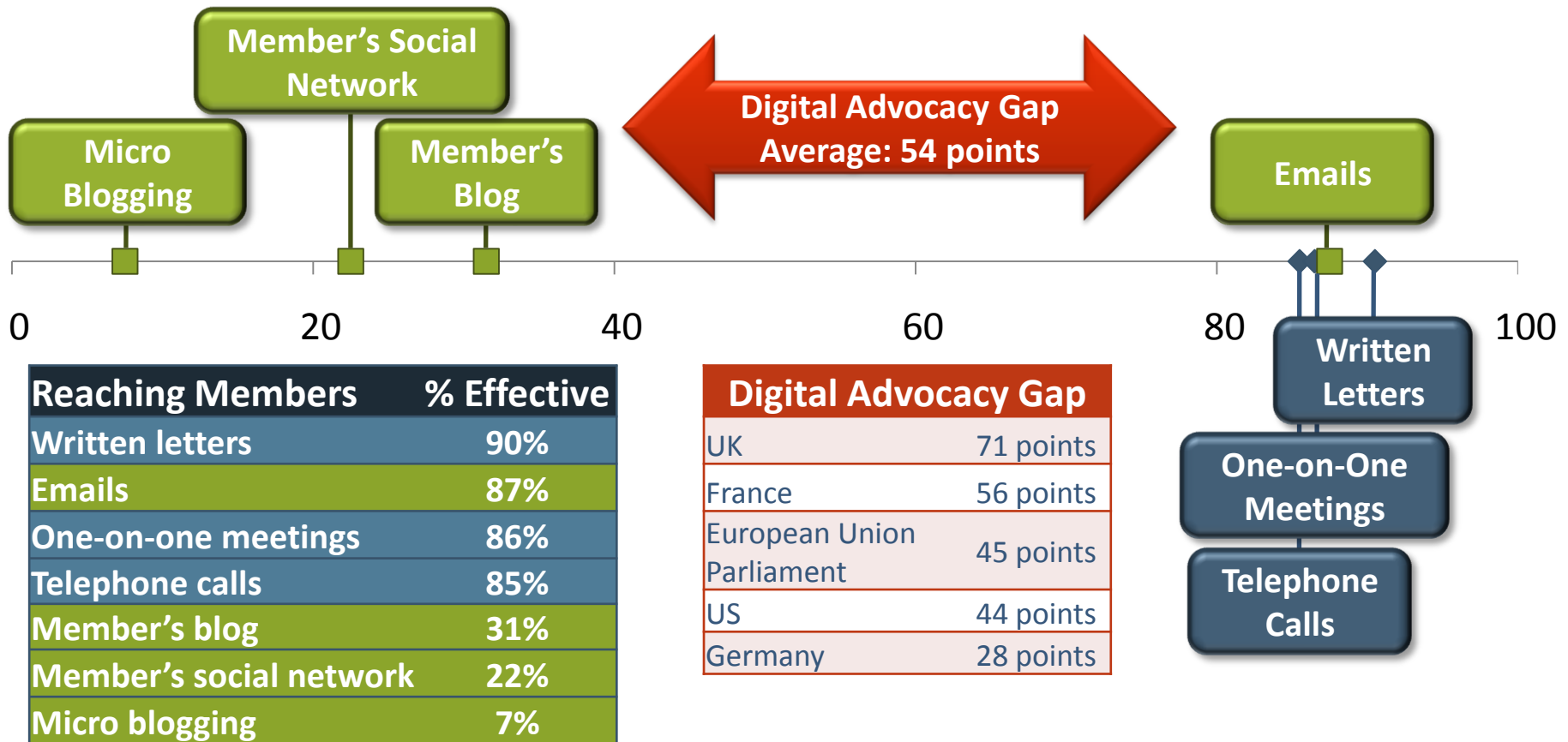
Traditional Channel
Digital Communication
Paid Media

Websites and emails have gained strong acceptance when communicating in both directions.

More advanced social media tools are gaining acceptance, especially in terms of communicating to constituents.

✓ Digital tools also have a multiplier effect, increasing reach and impact of traditional earned media

There remains an opportunity for effective and strategic digital public affairs to close the digital advocacy gap



Conclusion

- **Digital media has moved from a passive resource to an active driver of public policy.**
- **We are witnessing an “about face” with an increased use of Facebook to supplement face to face interaction among policymakers and constituents**
- **The blogosphere has become an important channel for researching and shaping policy with nearly 40% of staffers using it to monitor news on policy issues and to secure constituent opinion**
- **All media is local -- traditional regional media sources are the first sought out online for policy analysis, but dedicated online sources are being tapped as well**
- **There is an opportunity to close the Digital Advocacy Gap by leveraging digital media to multiply the impact of traditional public affairs**



Merci!
Danke!
Thank you !

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