



2010 Capital Staffers Index

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

Presented December 2, 2010

Research Methodology & Objectives

StrategyOne surveyed 271 senior 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.

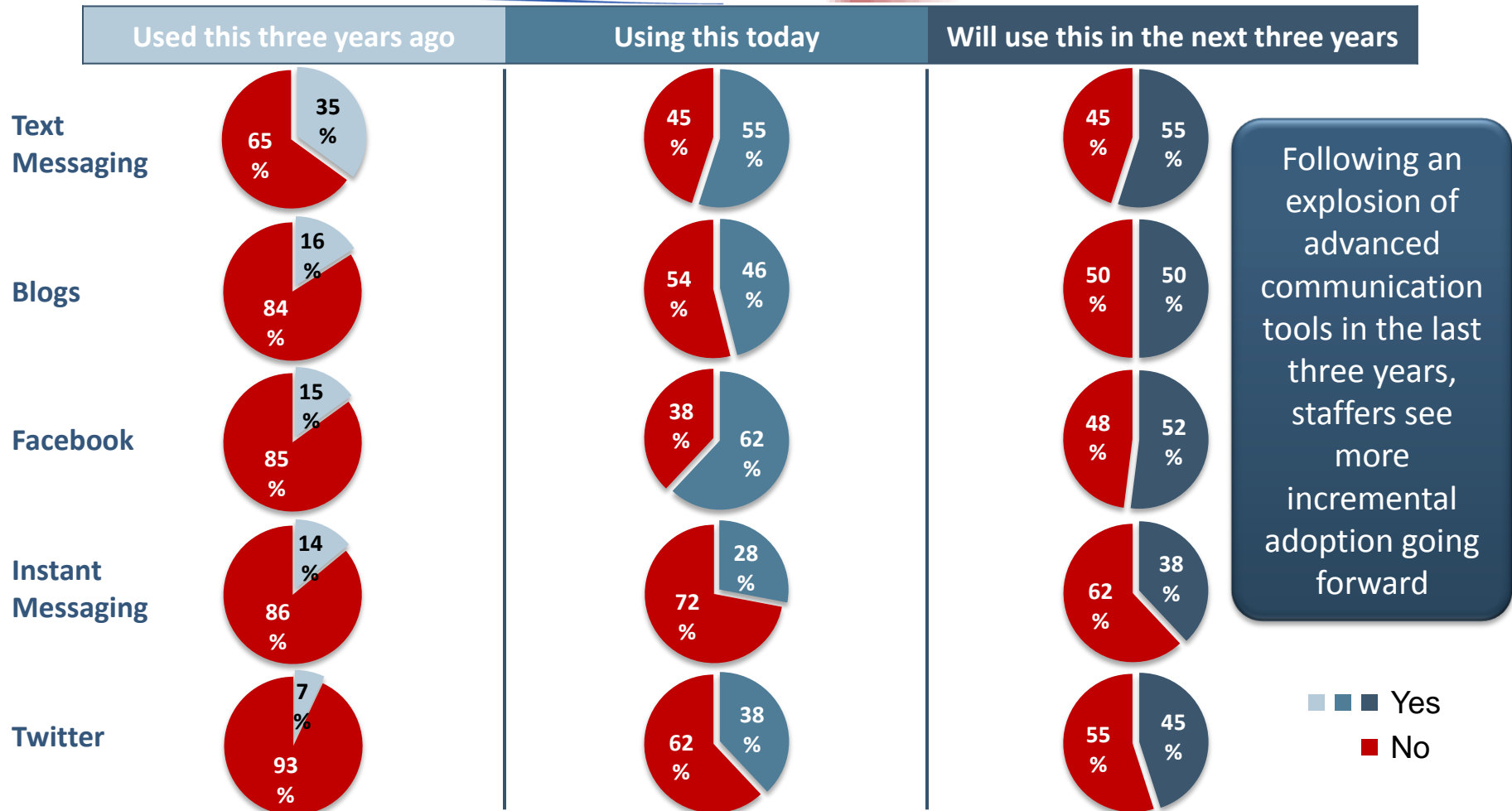
The overall margin of error is $\pm 6.0\%$ in 95 out of 100 cases.

Capital City	Audience	N size	Data Collection Dates
Washington, D.C., United States	U.S. Congressional staff	51	September 30 – October 8, 2010
London, United Kingdom	U.K. Parliament staff	50	October 5-11, 2010
Brussels, European Union	European Parliament staff	67	October 5-15, 2010
Paris, France	French Assembly staff	53	October 1-16, 2010
Berlin, Germany	Bundestag staff	50	October 7-19, 2010



**Conversations are
Once Again En Vogue**

Adoption of new communication tools such as text, blogs, and Facebook has more than doubled in the past three years

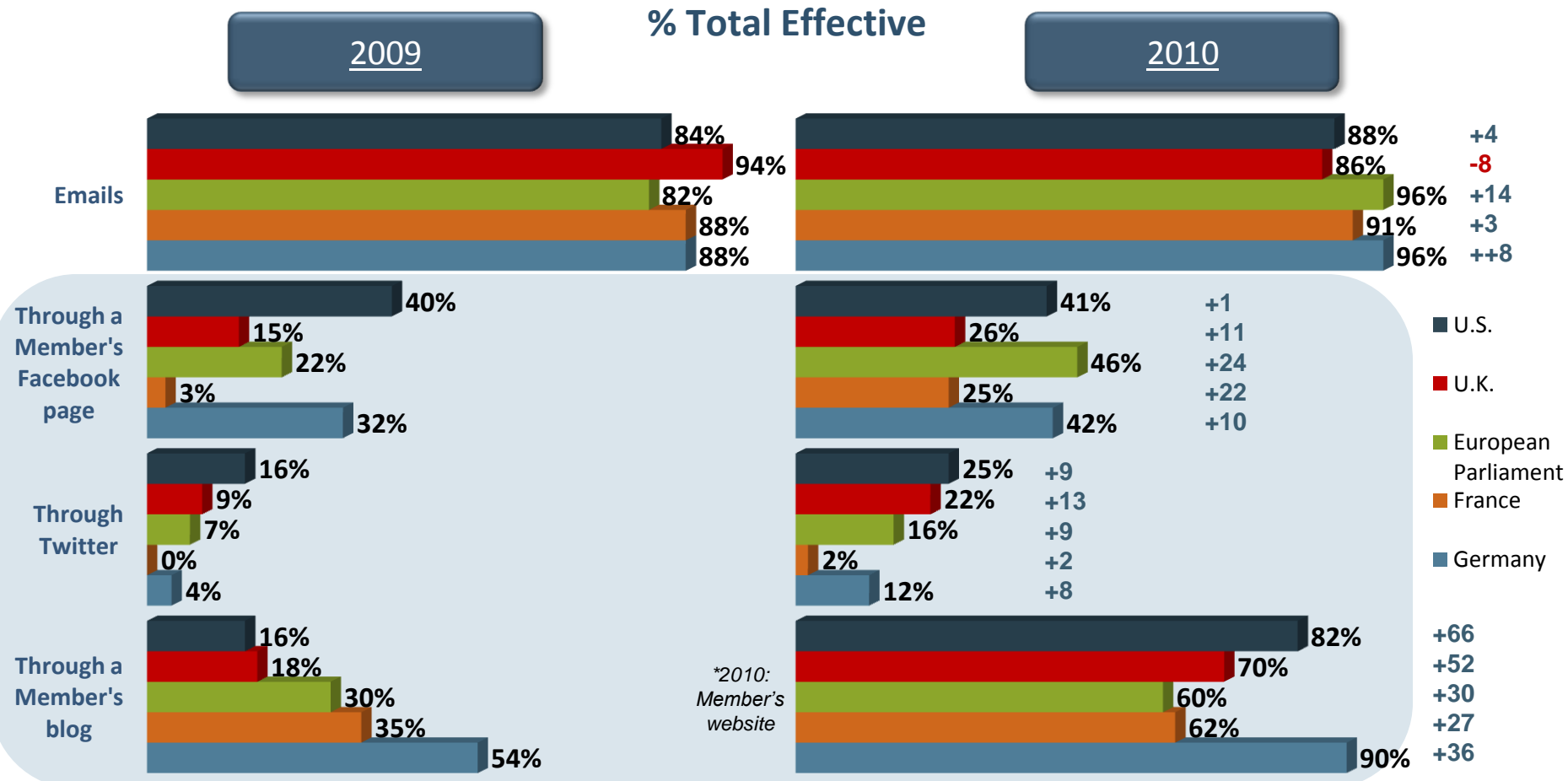


The impact of digital communication has made significant gains, enhancing traditional outreach

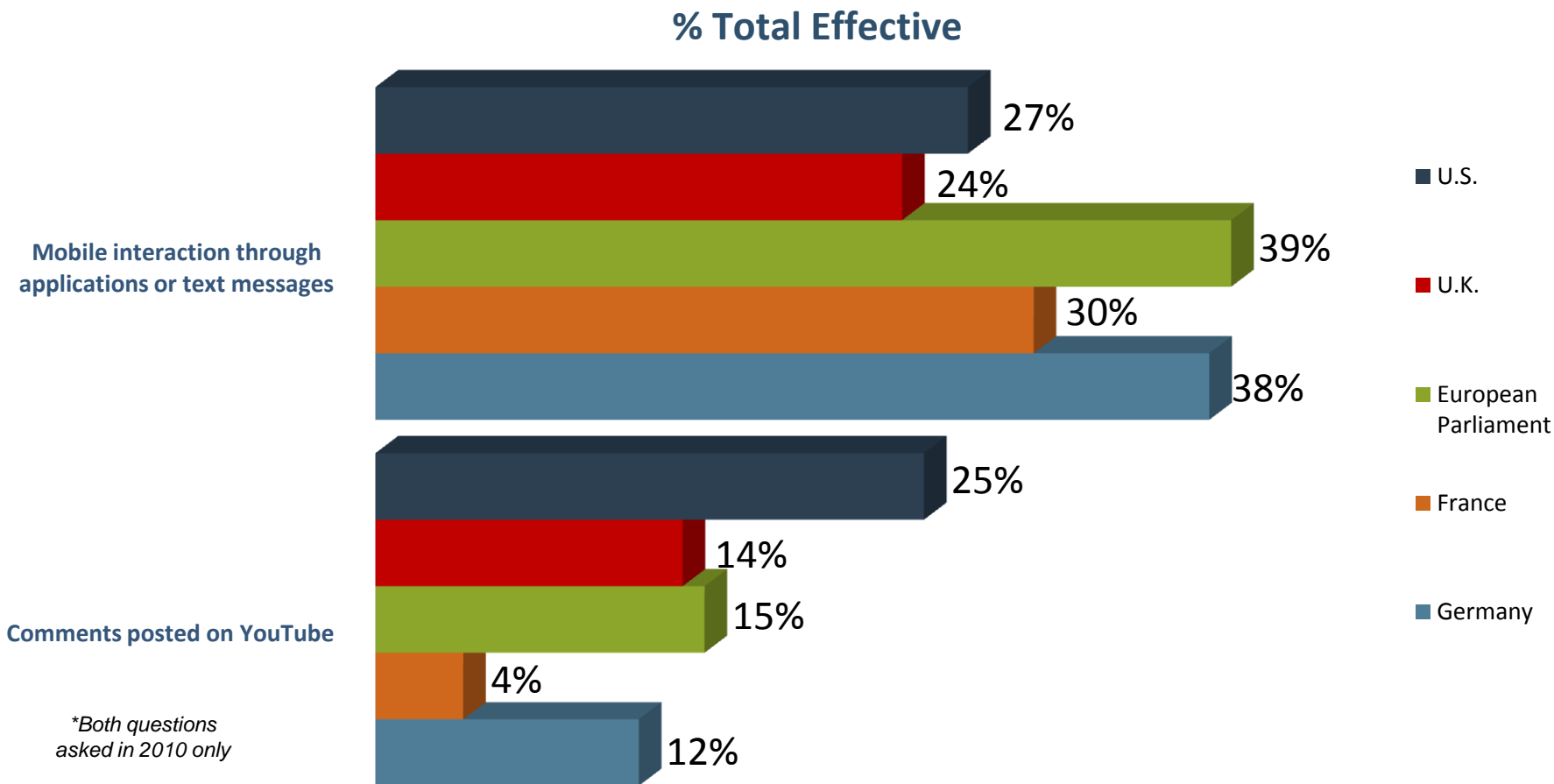
Reaching Constituents % Effective	2009	2010	Change
One-on-one meetings	95%	90%	-5
Television appearances	92%	93%	+1
Speaking events	91%	90%	-1
Newspaper columns	85%	86%	+1
Radio appearances	85%	85%	--
Websites	82%	82%	--
Press releases	76%	79%	+3
Television advertising	61%	47%	-14
Print advertising	61%	48%	-13
Op-eds	60%	66%	+6
Online videos	51%	42%	-9
✓ Blogging	46%	52%	+6
Radio advertising	46%	42%	-4
Online advertising	32%	31%	-1
✓ Micro blogging	22%	33%	+11
Podcasting	n/a	41%	n/a
Text messaging	n/a	37%	n/a

Reaching Members % Effective	2009	2010	Change
Written letters	90%	88%	-2
✓ E-mails	87%	92%	+5
In-person visits	86%	88%	+2
Telephone calls	85%	83%	-2
✓ Member's blog/website	31%	72%	+41
✓ Member's social network	22%	37%	+15
✓ Micro blogging/Twitter	7%	15%	+8
Mobile interaction	n/a	32%	n/a
Comments on YouTube	n/a	14%	n/a

E-mails continue to be effective, yet staffers are realizing the greater impact of social media outlets

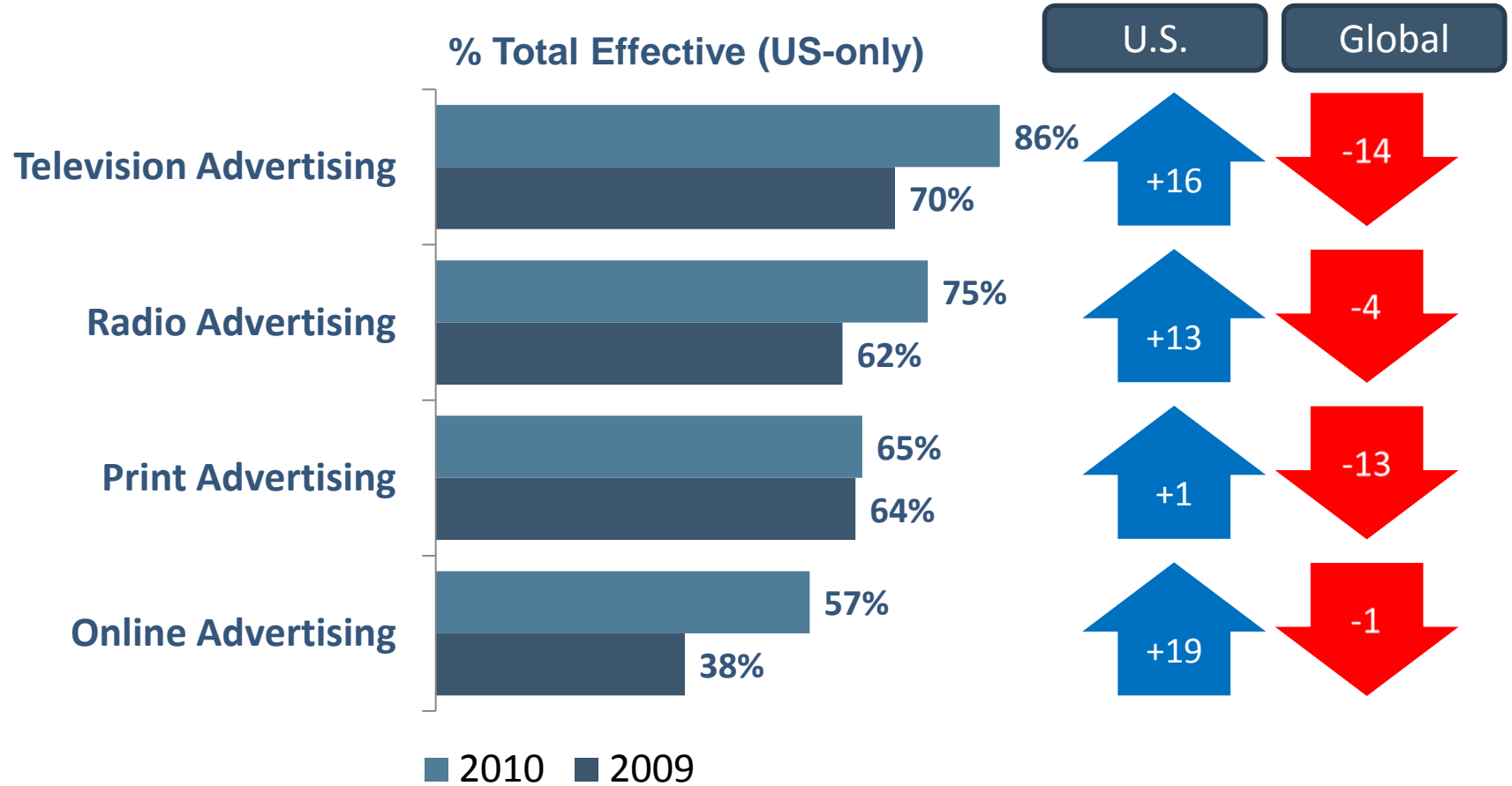


Mobile interaction with Members is also seen as effective, especially in Continental Europe



**Both questions asked in 2010 only*

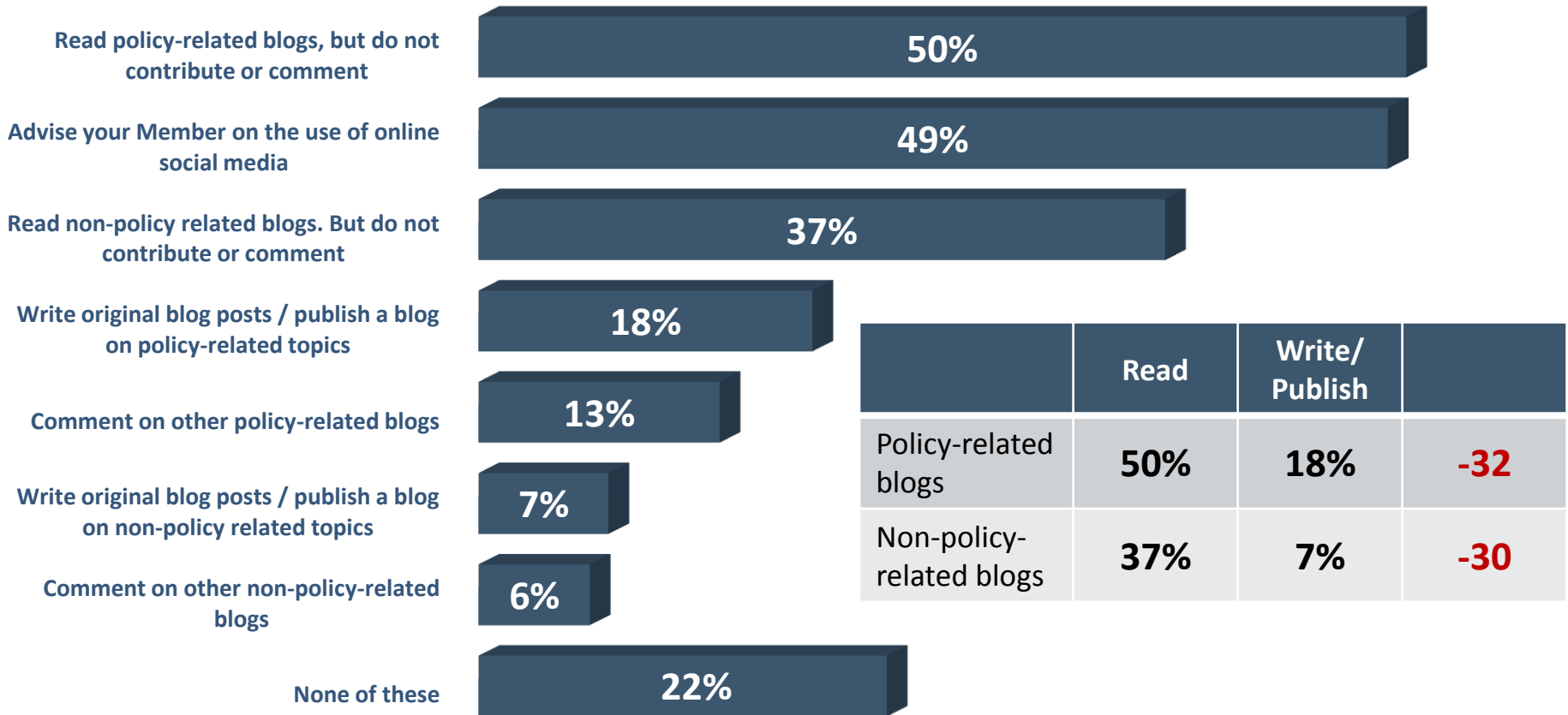
Staffers in the U.S. differed from colleagues abroad in their assessment of paid media



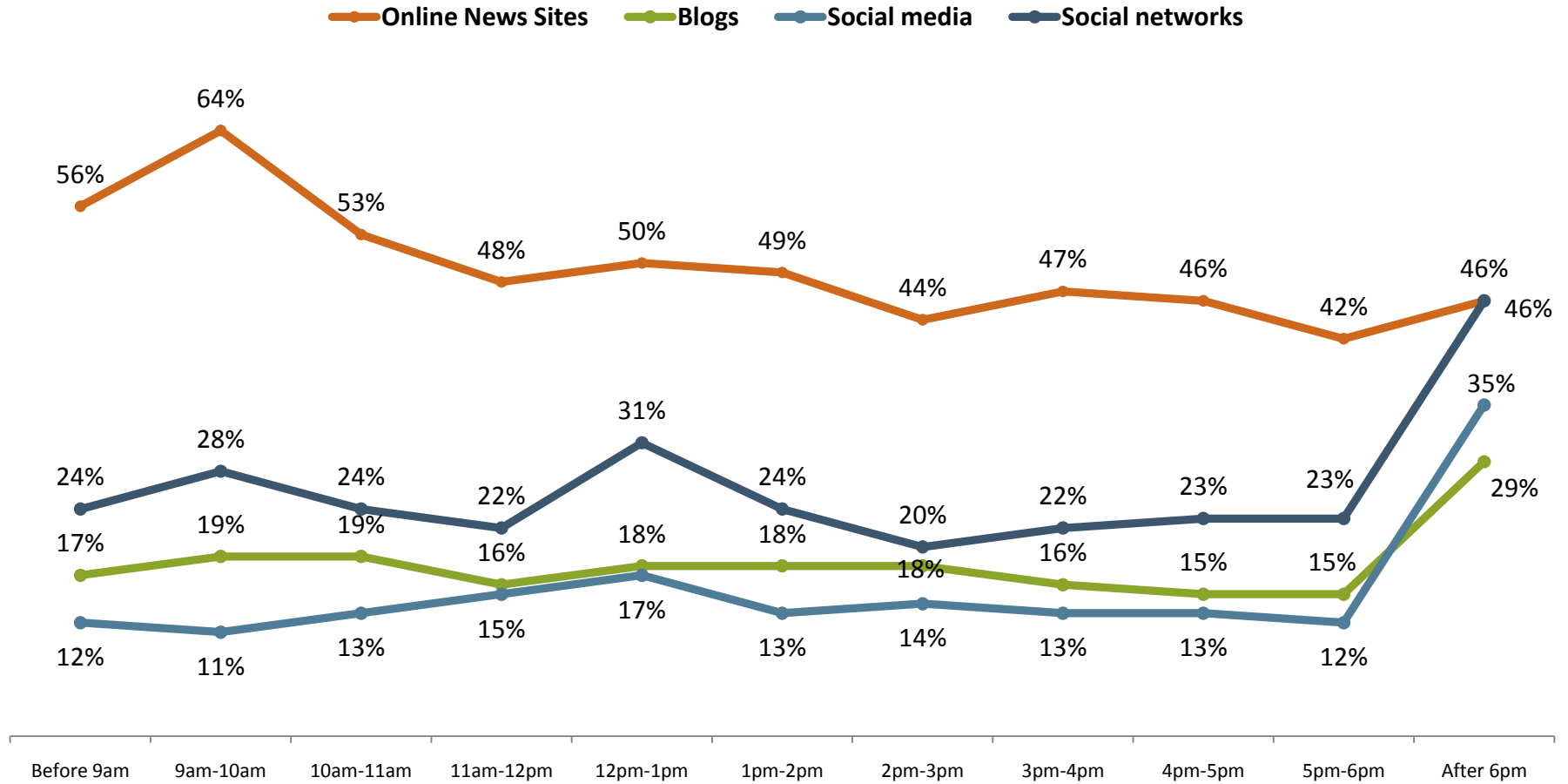


A Time and a Place for Everything

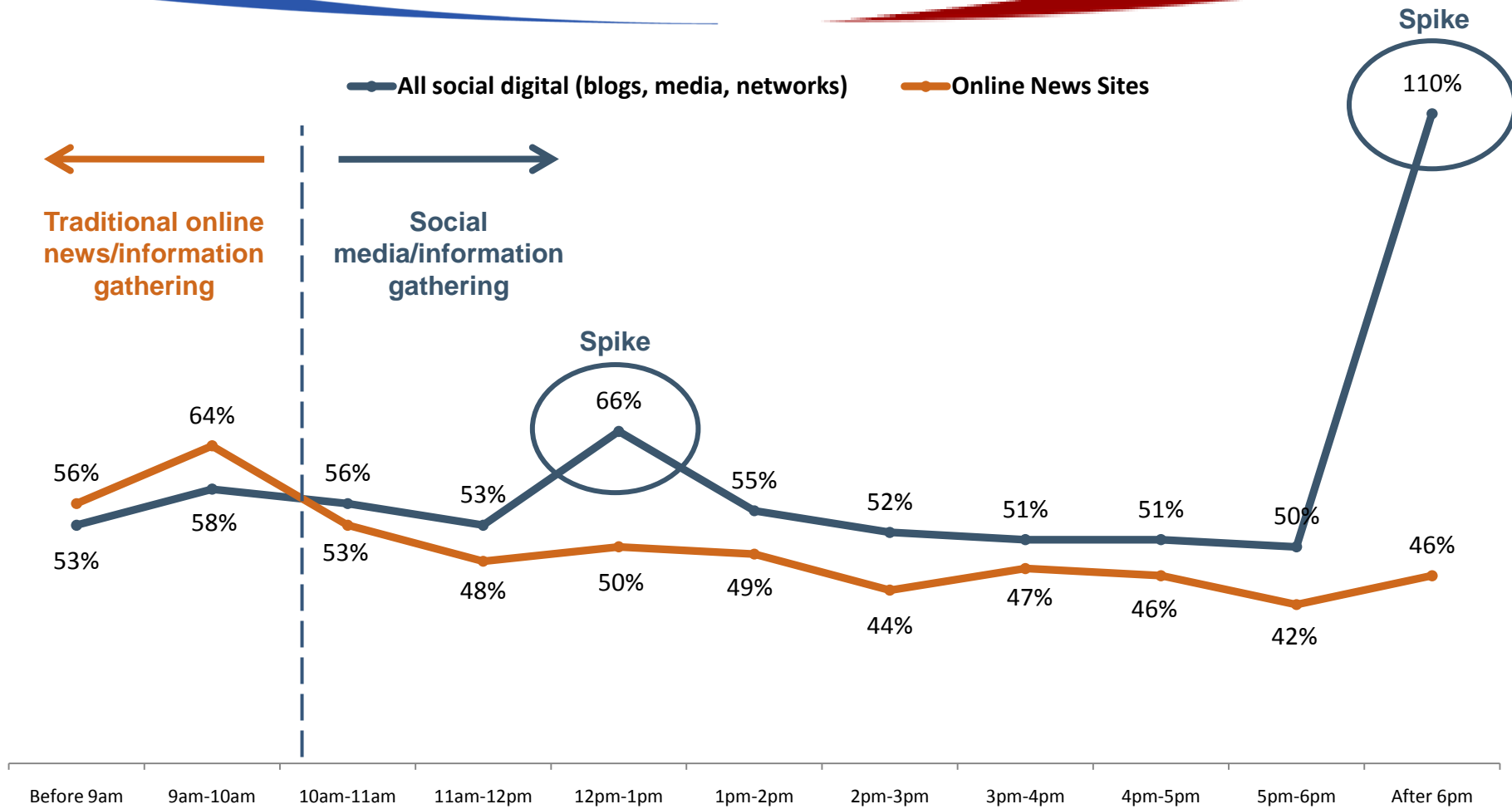
Staffers are more voyeurs than participants



Social media and social network access peaks at lunchtime and after the normal work day



Prior to 10am, staffers rely on traditional online news sources. However, after 10am their attention shifts to social media, with sizable spikes at noon and after 6pm





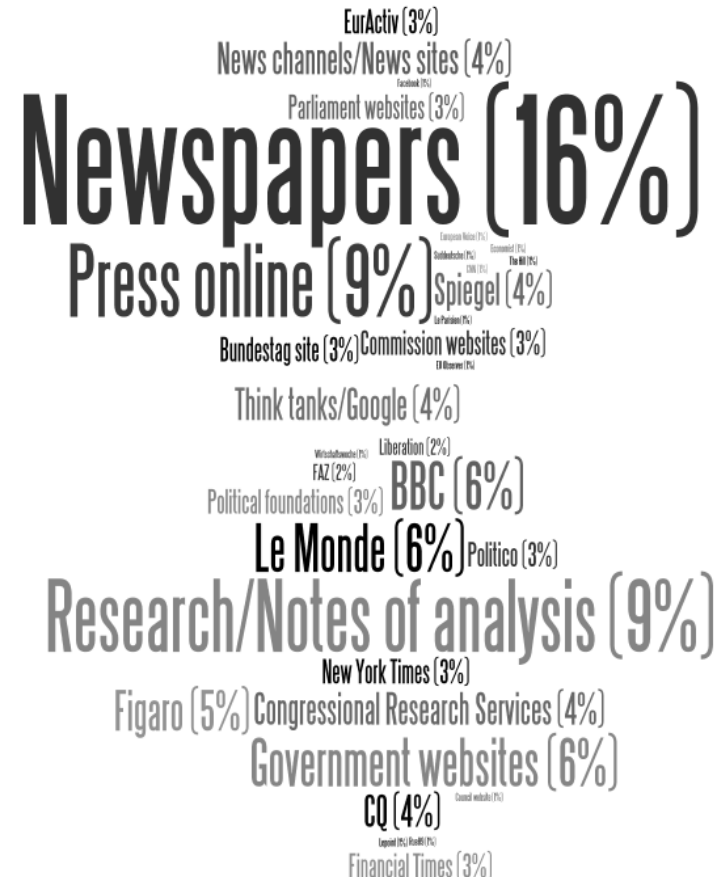
Traditions are Hard to Break

The leading policy information sources online are websites of newspapers

2009



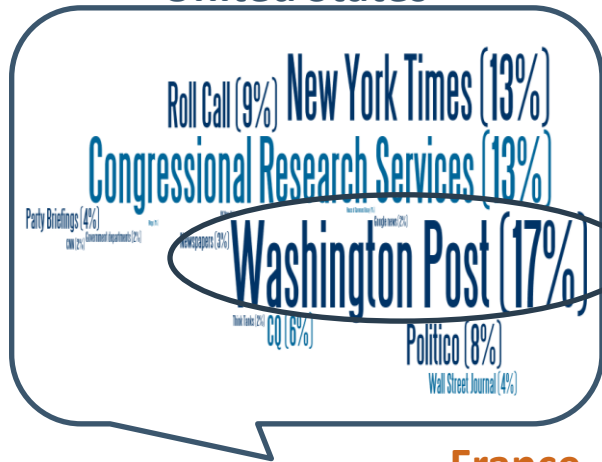
2010



Last year, staffers indicated they trust online news and newspaper sites the most for policy analysis

2009

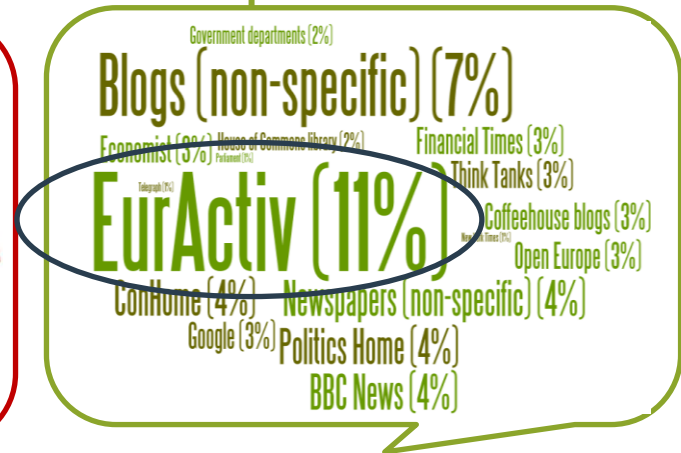
United States



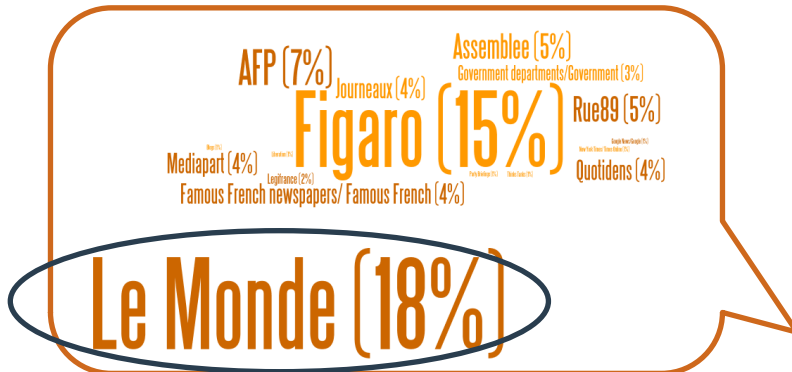
United Kingdom



European Parliament



France



Germany



The leading online policy information sources remain websites of newspapers (non-specific)

2010

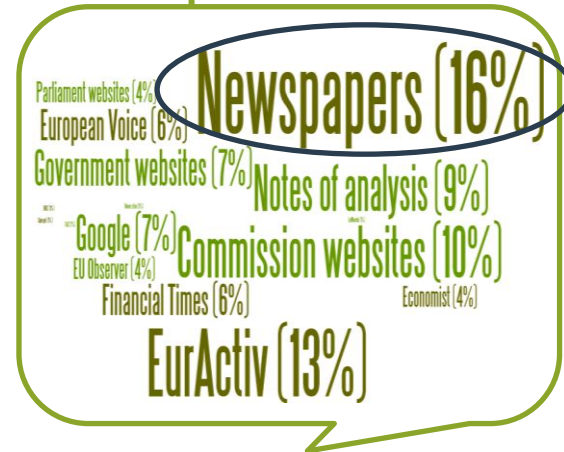
United States



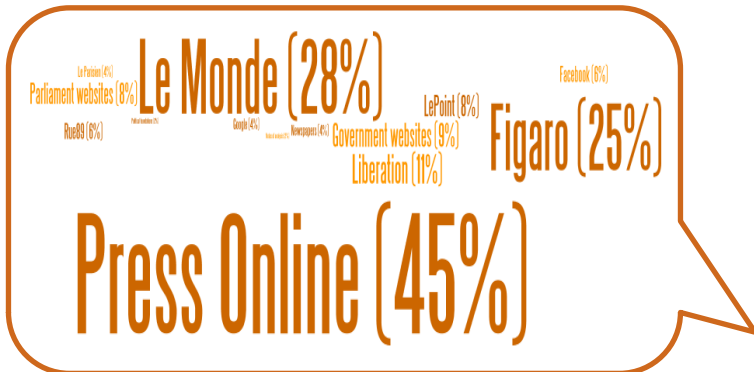
United Kingdom



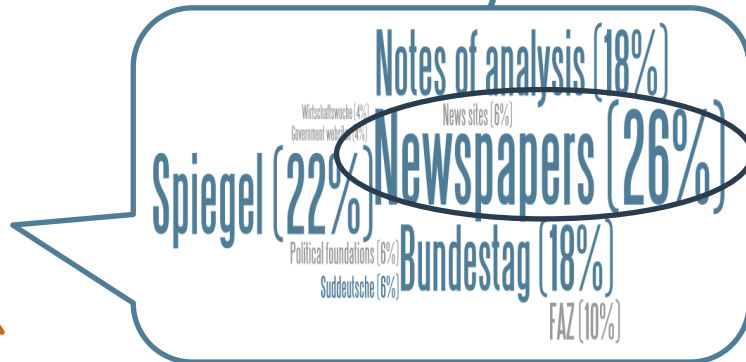
European Parliament



France



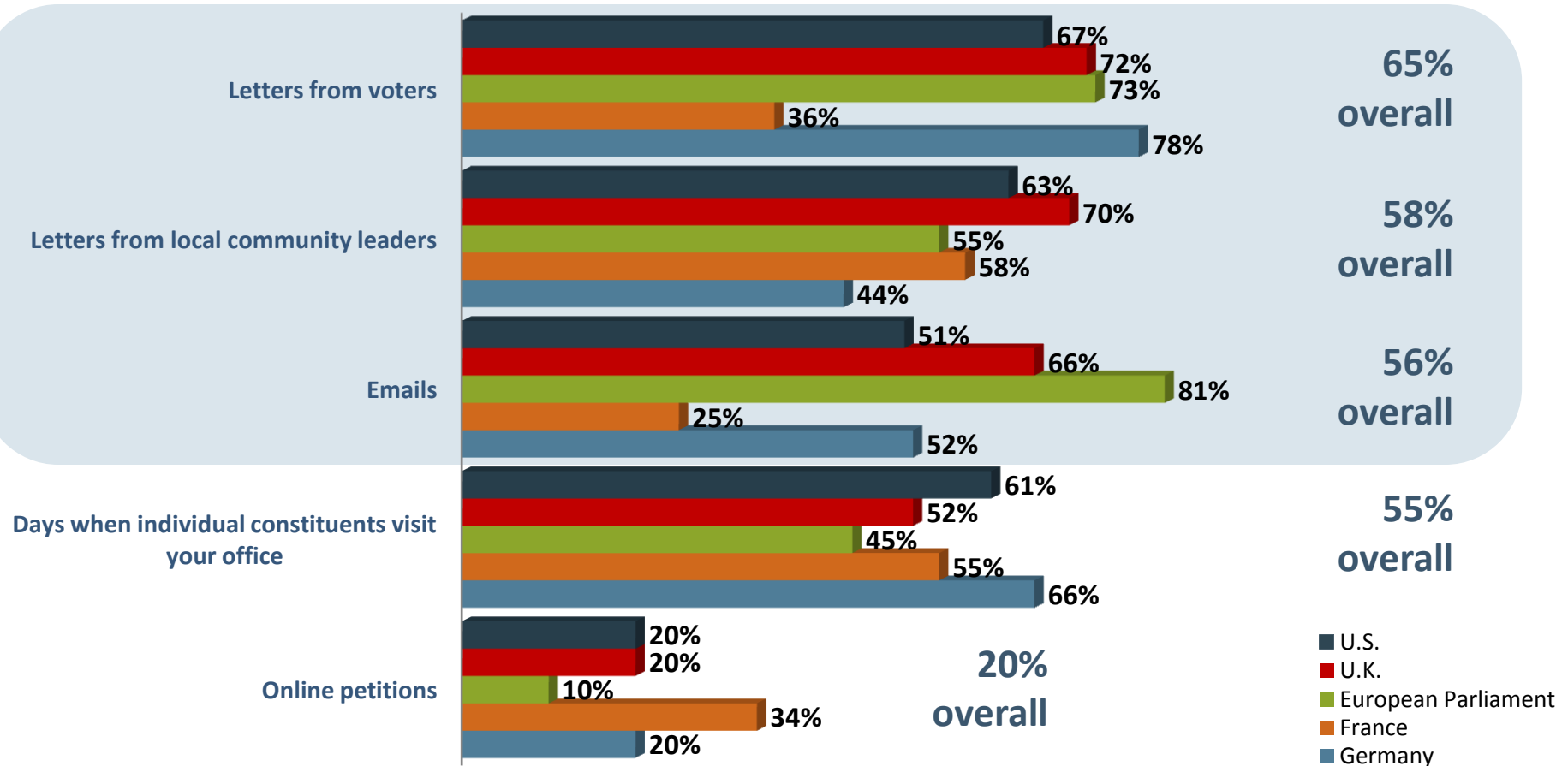
Germany



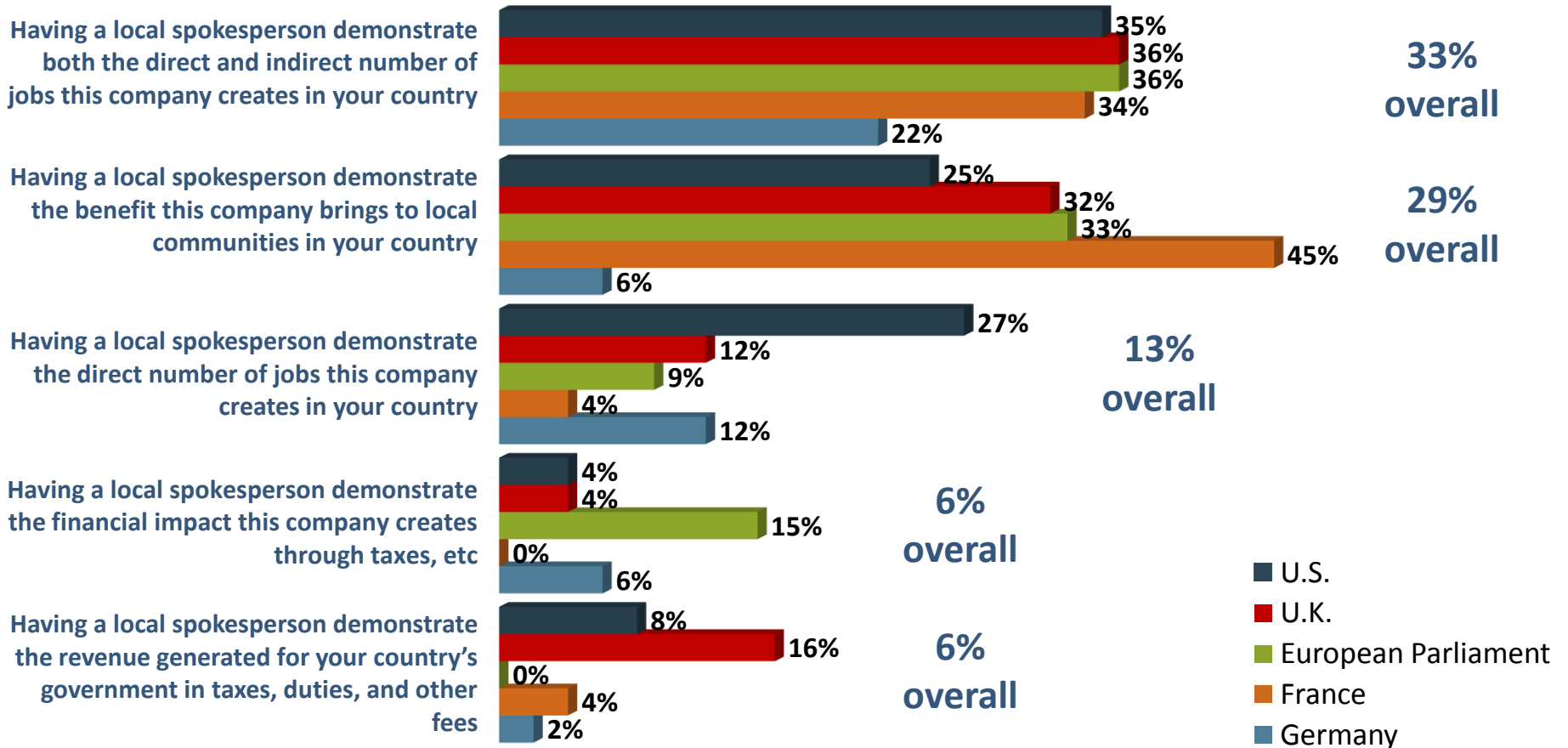


Advocacy with a Local Flavor

Mobilizing support from grassroots and advocacy groups, is no longer a U.S. phenomenon

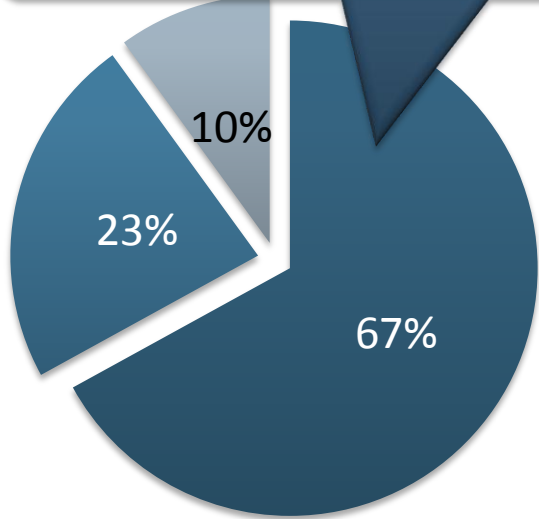


Staffers want to see how foreign-based companies are creating jobs and benefitting local communities in their countries

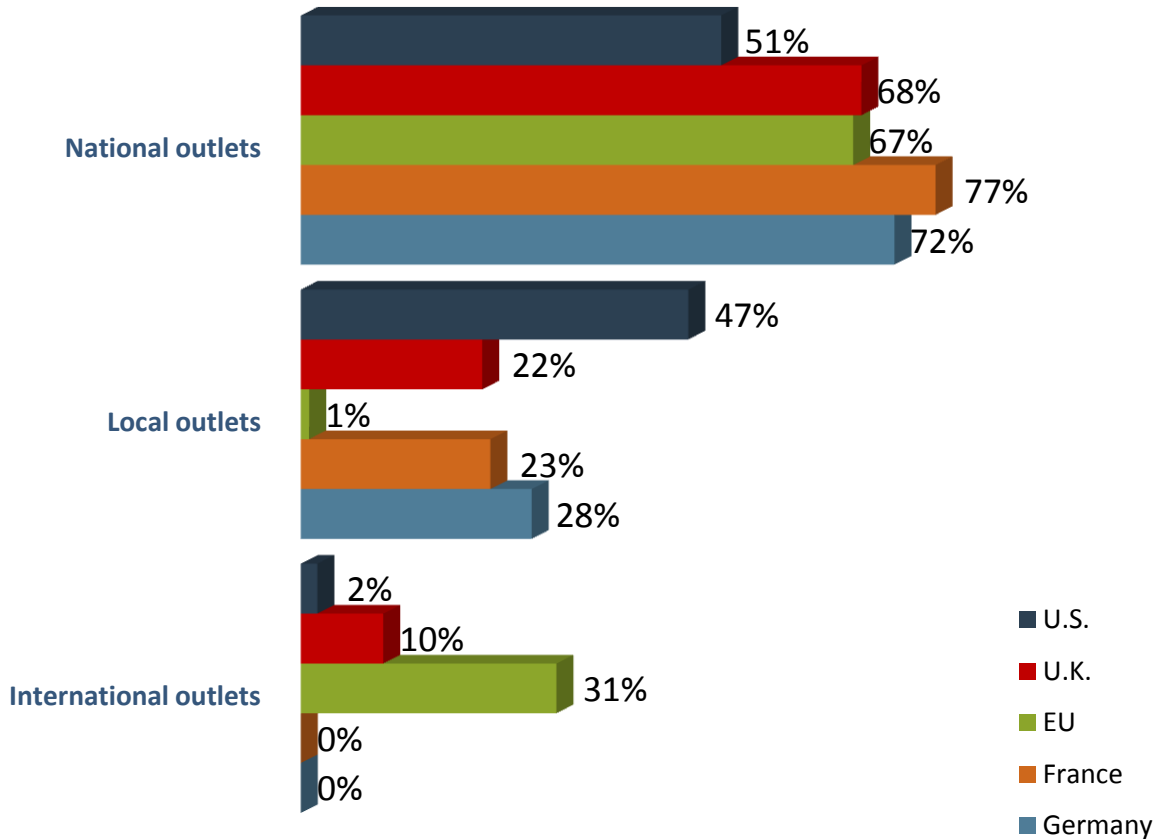


International outlets do not draw much attention; staffers want to focus on what's going on in their Member's country/district

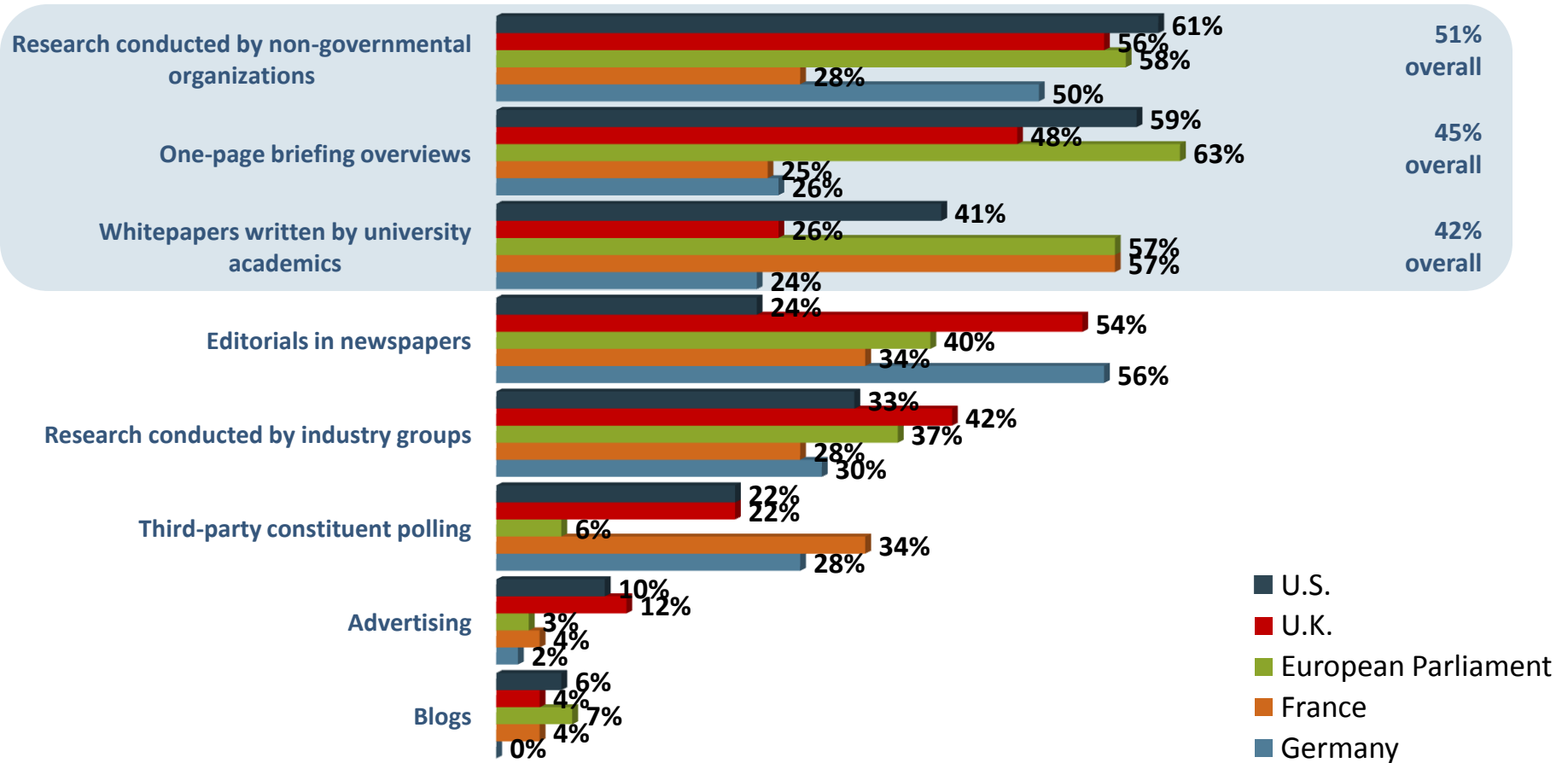
When it comes to policy issues, staffers turn to their own national outlets



- National outlets that focus on your member's country
- Local outlets that focus on your member's region
- International outlets that focus on multiple countries



Independent research and succinct messaging is the most credible vehicle for lobbyists



Strategic Recommendations

- Respect the old and the new
 - Traditional and digital public affairs are morphing
- Apply cultural shading to social media
 - Match the most acceptable digital tools with the market
- Timing is everything
 - Guide your outreach with the *daily digital access trend*
- Mobilization knows no bounds
 - Advocacy building is embraced on both sides of the Atlantic and should not be overlooked
- Succinct, supported messages are the most impactful
 - Concise messaging, backed up by independent research
- Tell the complete contribution story
 - Members want to know an organization's social and economic footprint



National Scorecards

Summary of United States Staffer Data



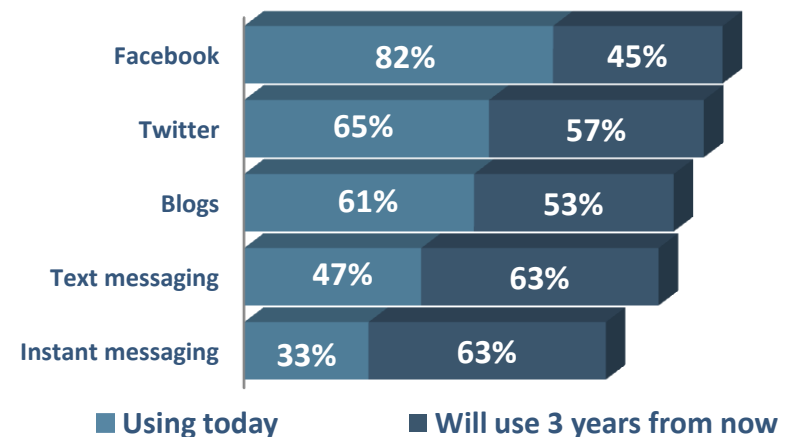
% Total Effective	Effectiveness of Outbound Digital Communications			
	2009	2010	Change	
	86%	88%	+2	
	76%	59%	-17	
	50%	59%	+9	
	38%	57%	+19	
	40%	51%	+11	
	n/a	43%	n/a	
	n/a	31%	n/a	



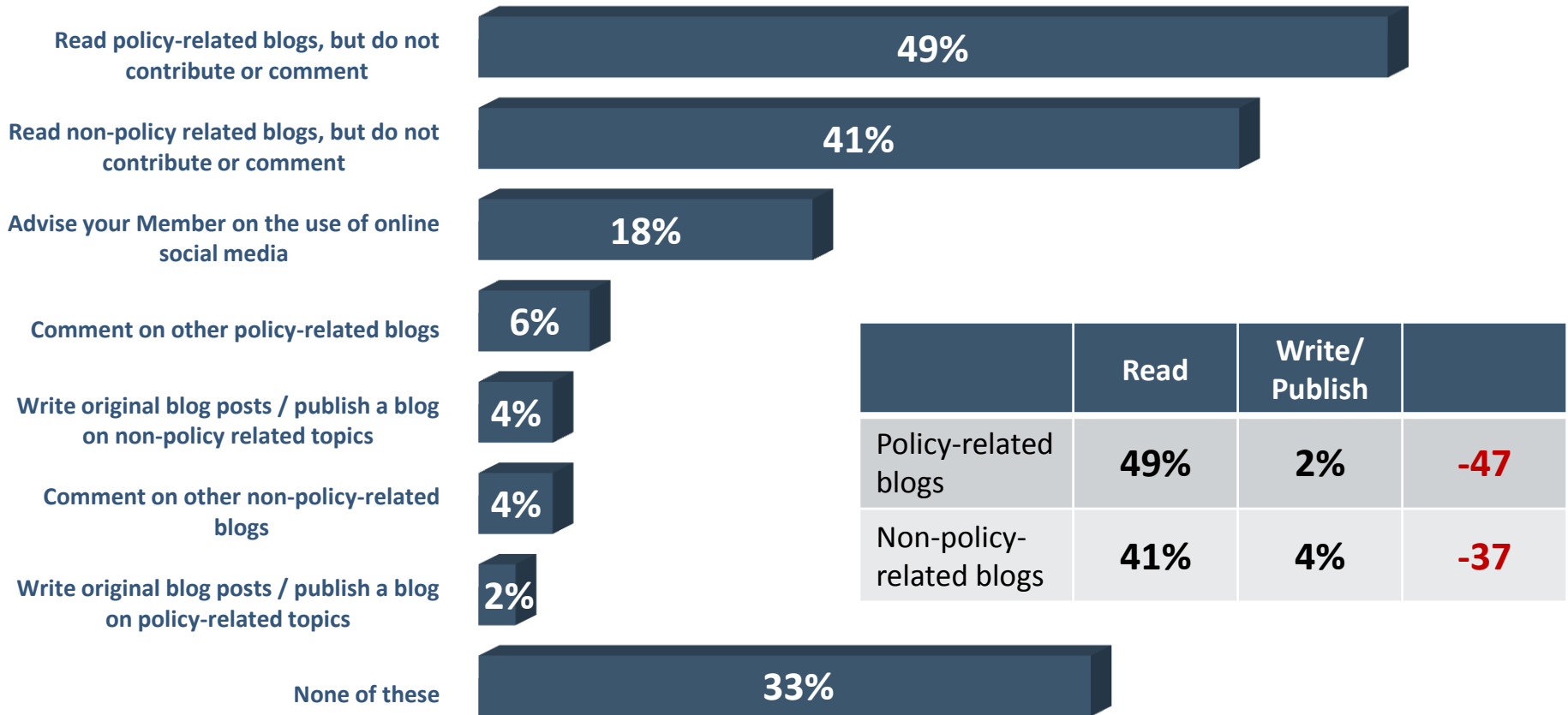
% Total Effective	Effectiveness of Inbound Digital Communications			
	2009	2010	Change	
	84%	88%	+4	
	16%	82%	+66	
	40%	41%	+1	
	n/a	27%	n/a	
	16%	25%	+9	
	n/a	25%	n/a	

Most Trusted Online Sources for Policy Analysis	2009	2010	Change
Newspapers	3%	22%	+19
CQ	6%	20%	+4
Congressional Research Service	13%	16%	+3
Politico	8%	14%	+6
The New York Times	13%	8%	-5

Members' Digital Usage

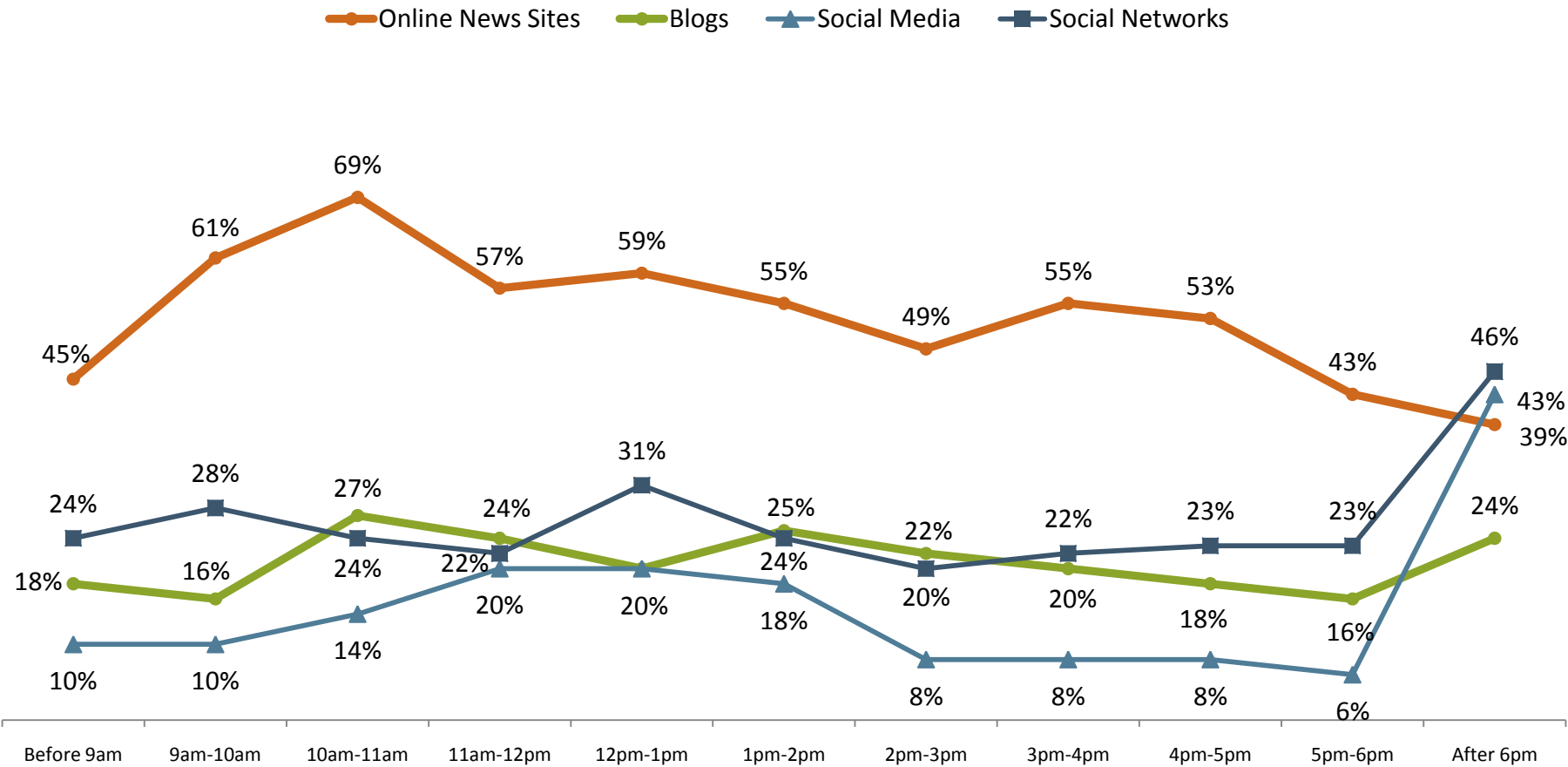


U.S. staffers are most interested in reading policy-related blogs



United States

U.S. data suggests staffers access social media and networks for personal reasons; access is highest outside of work



United States

When during the day do you normally access the following types of sites?



Summary of European Parliament Staffer Data

Member → **Constituent**

Effectiveness of Outbound Digital Communications	2009	2010	Change
Websites	75%	78%	+3
Blogging	45%	51%	+6
Online videos	62%	45%	-17
Podcasting	n/a	42%	n/a
Text messaging	n/a	36%	n/a
Online advertising	38%	34%	-4
Micro blogging	27%	33%	+6

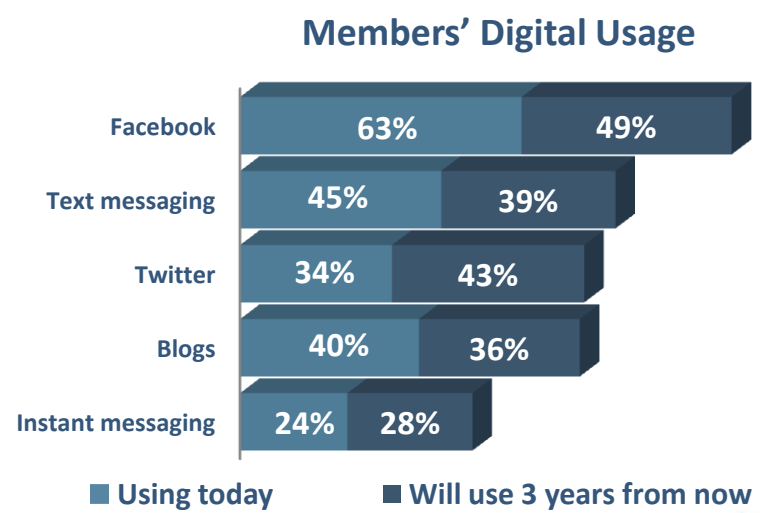
% Total Effective

Constituent → **Member**

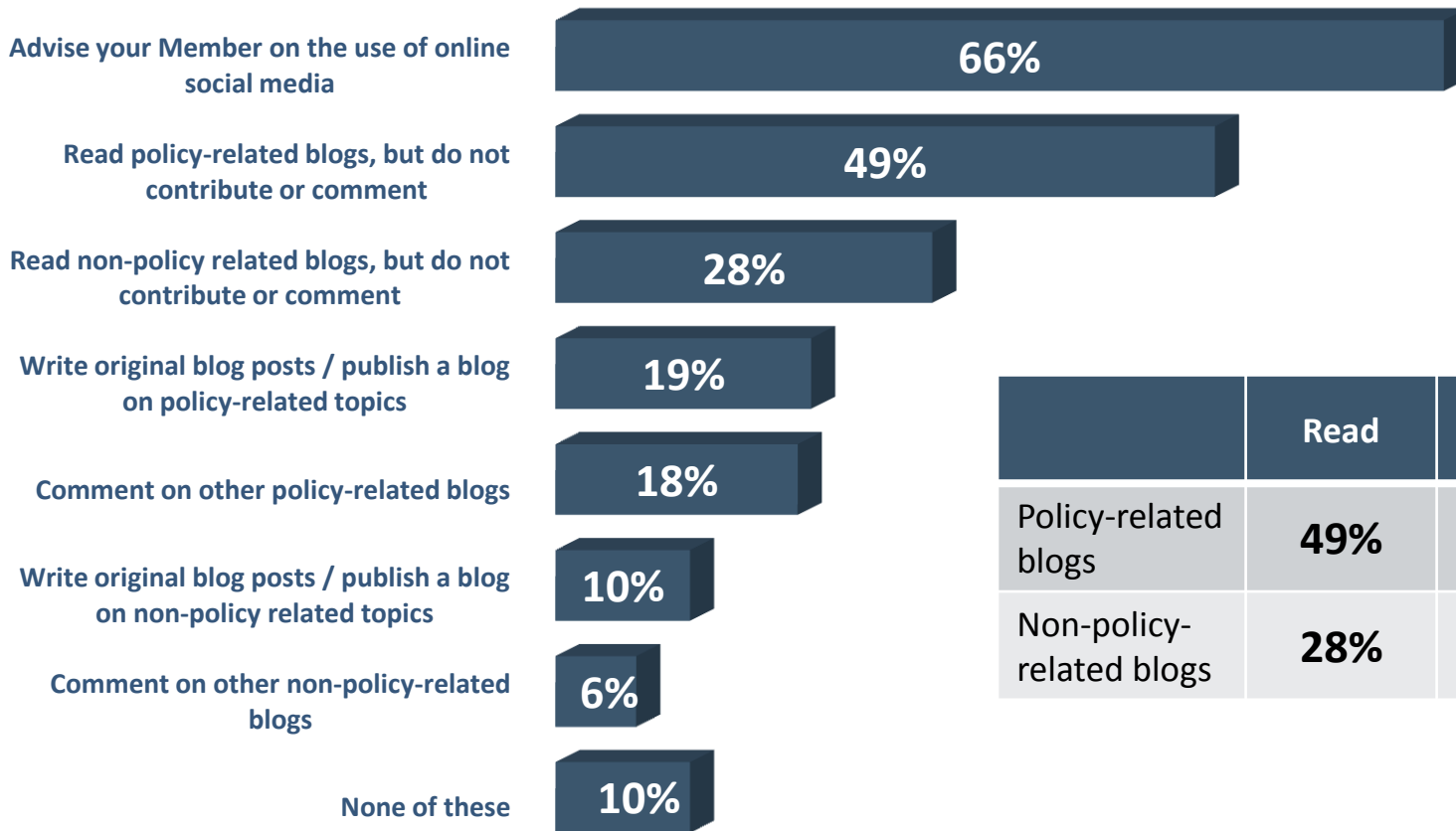
Effectiveness of Inbound Digital Communications	2009	2010	Change
E-mails	82%	96%	+14
Member's blog/website	30%	60%	+30
Member's Facebook page	22%	46%	+24
Mobile interaction	n/a	39%	n/a
Twitter	7%	16%	+9
Comments posted on YouTube	n/a	15%	n/a

% Total Effective

Most Trusted Online Sources for Policy Analysis	2009	2010	Change
Newspapers	4%	16%	+12
EurActiv	11%	13%	+2
Commission website	n/a	10%	n/a
Research	n/a	9%	n/a
Think tank / Google	3%	7%	+4
Government website	2%	7%	+5



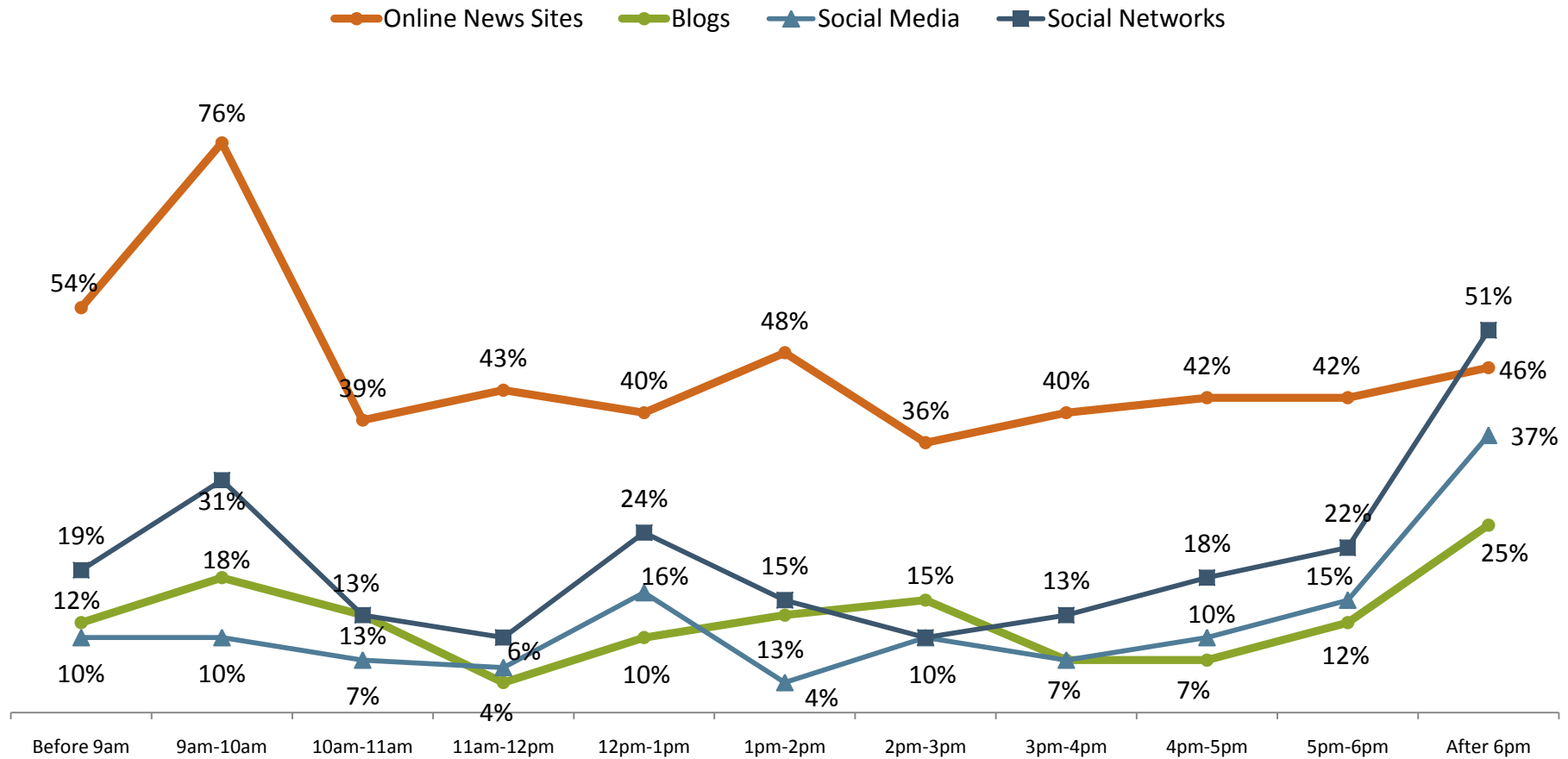
More than one-half of European Parliament staffers advise their Members on the use of online social media



	Read	Write/ Publish	
Policy-related blogs	49%	19%	-30
Non-policy-related blogs	28%	10%	-18

European Union

European Parliament staffers take time during their lunch hour and after work to access their social networks and social media



European Union

Summary of Germany Staffer Data



	2009	2010	Change
Effectiveness of Outbound Digital Communications			
Websites	84%	90%	+6
Blogging	32%	50%	+18
Text messaging	n/a	46%	n/a
Podcasting	n/a	40%	n/a
Online videos	44%	40%	-4
Micro blogging	10%	36%	+26
Online advertising	26%	32%	+6

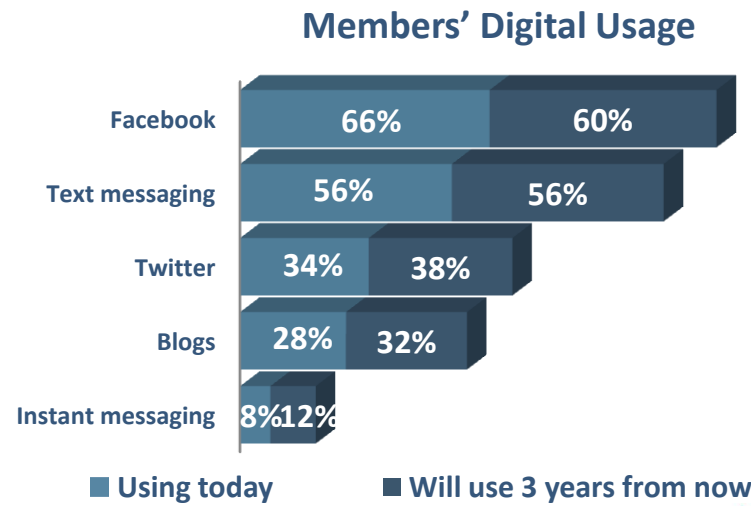
% Total Effective



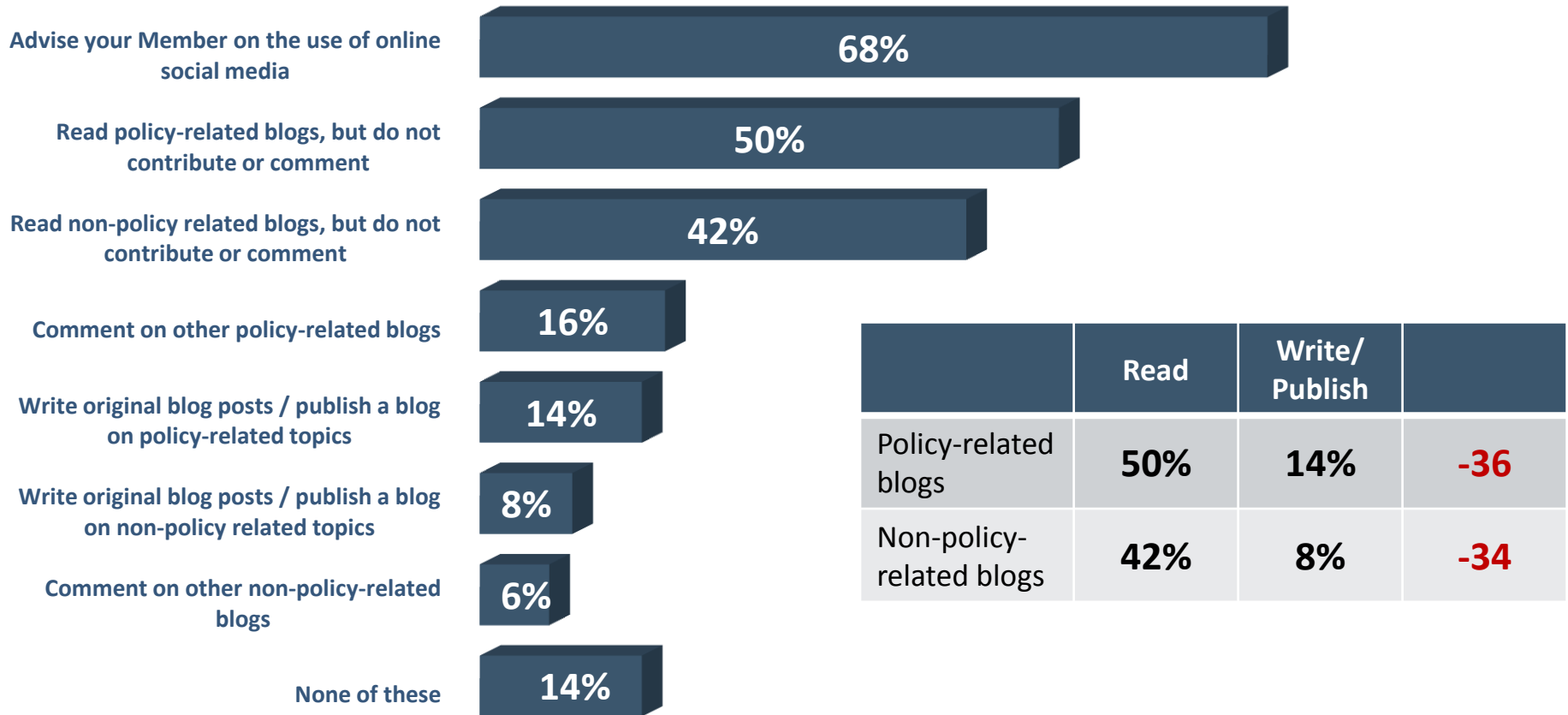
	2009	2010	Change
Effectiveness of Inbound Digital Communications			
E-mails	88%	96%	+8
Member's blog/website	54%	90%	+36
Member's Facebook page	32%	42%	+10
Mobile interaction	n/a	38%	n/a
Twitter	4%	12%	+8
Comments posted on YouTube	n/a	12%	n/a

% Total Effective

Most Trusted Online Sources for Policy Analysis	2009	2010	Change
Newspapers	18%	26%	+8
Spiegel online	14%	22%	+8
Bundestag	19%	18%	-1
Research/Notes of analysis	n/a	18%	n/a
FAZ	n/a	10%	n/a



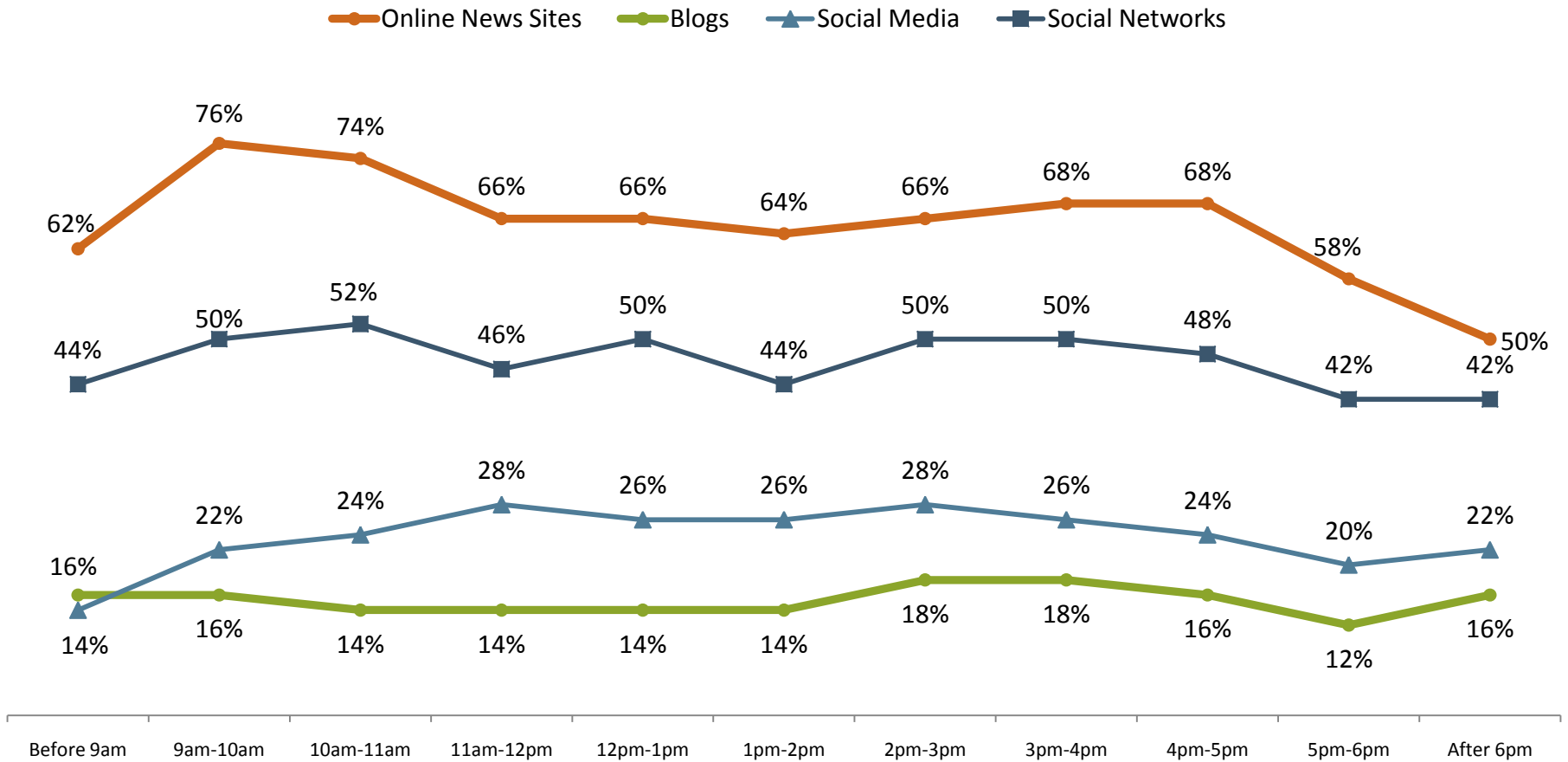
A majority of Germany staffers also advise Members on the use of online media, yet a sizeable number also read both policy- and non-policy-related blogs



Germany

Which, if any, of the following activities do you do?

Germany staffers also access social digital media on a regular basis



Germany

When during the day do you normally access the following types of sites?

Summary of France Staffer Data



% Total Effective

Effectiveness of Outbound Digital Communications	2009	2010	Change
Websites	77%	77%	--
Blogging	64%	74%	+10
Podcasting	n/a	47%	n/a
Online videos	36%	38%	+2
Text messaging	n/a	32%	n/a
Micro blogging	16%	19%	+3

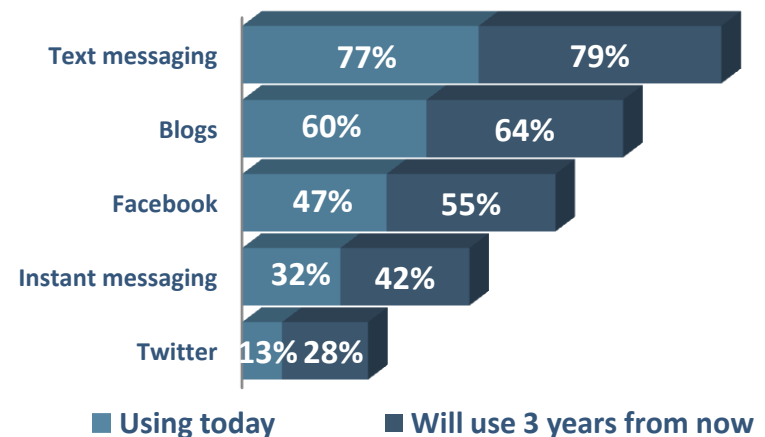


% Total Effective

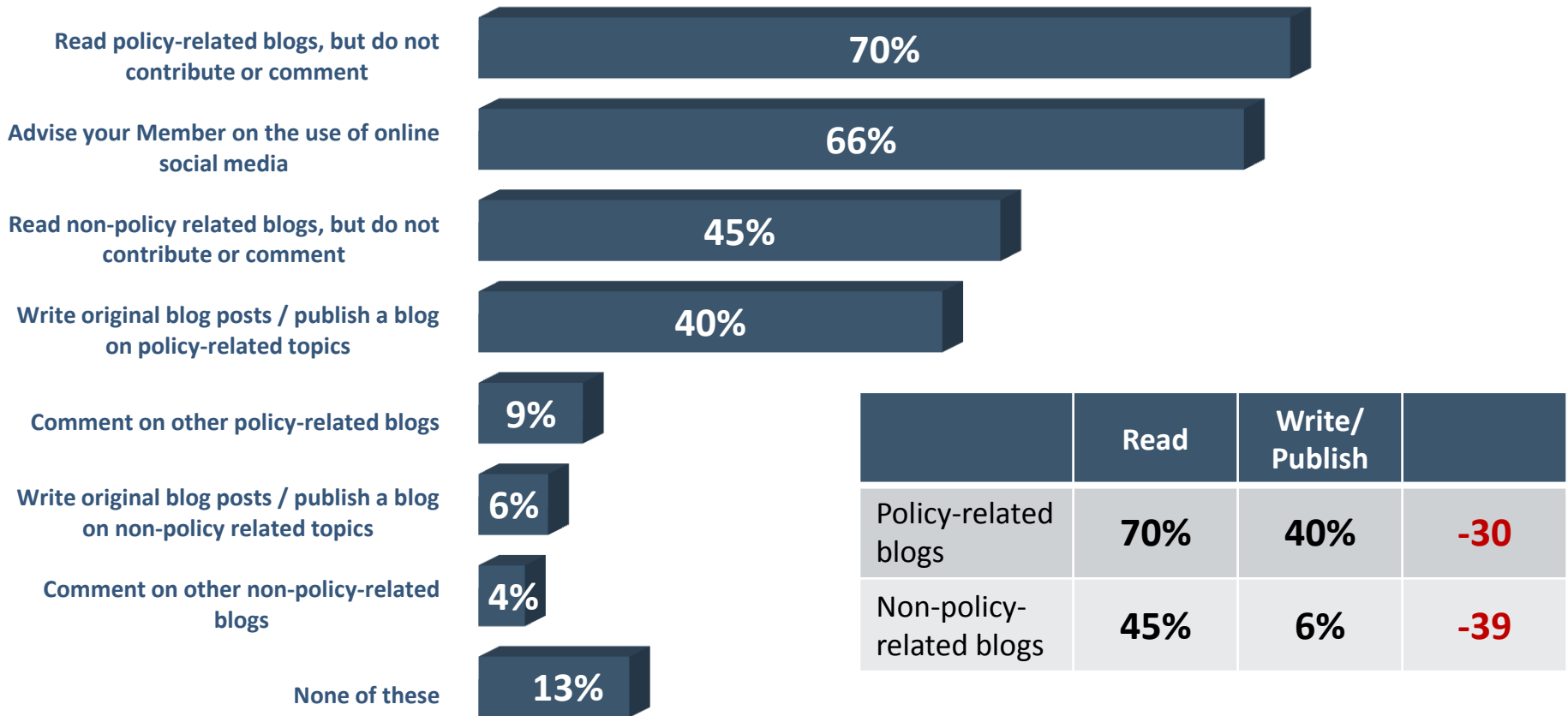
Effectiveness of Inbound Digital Communications	2009	2010	Change
E-mails	88%	91%	+3
Member's blog/website	35%	62%	+27
Mobile interaction	n/a	30%	n/a
Member's Facebook page	3%	25%	+22
Comments posted on YouTube	n/a	4%	n/a
Twitter	0%	2%	+2

Most Trusted Online Sources for Policy Analysis	2009	2010	Change
Press online	n/a	45%	n/a
Le Monde	24%	28%	+4
Figaro	18%	25%	+7
Liberation	17%	11%	-6
Government websites	n/a	9%	n/a

Members' Digital Usage



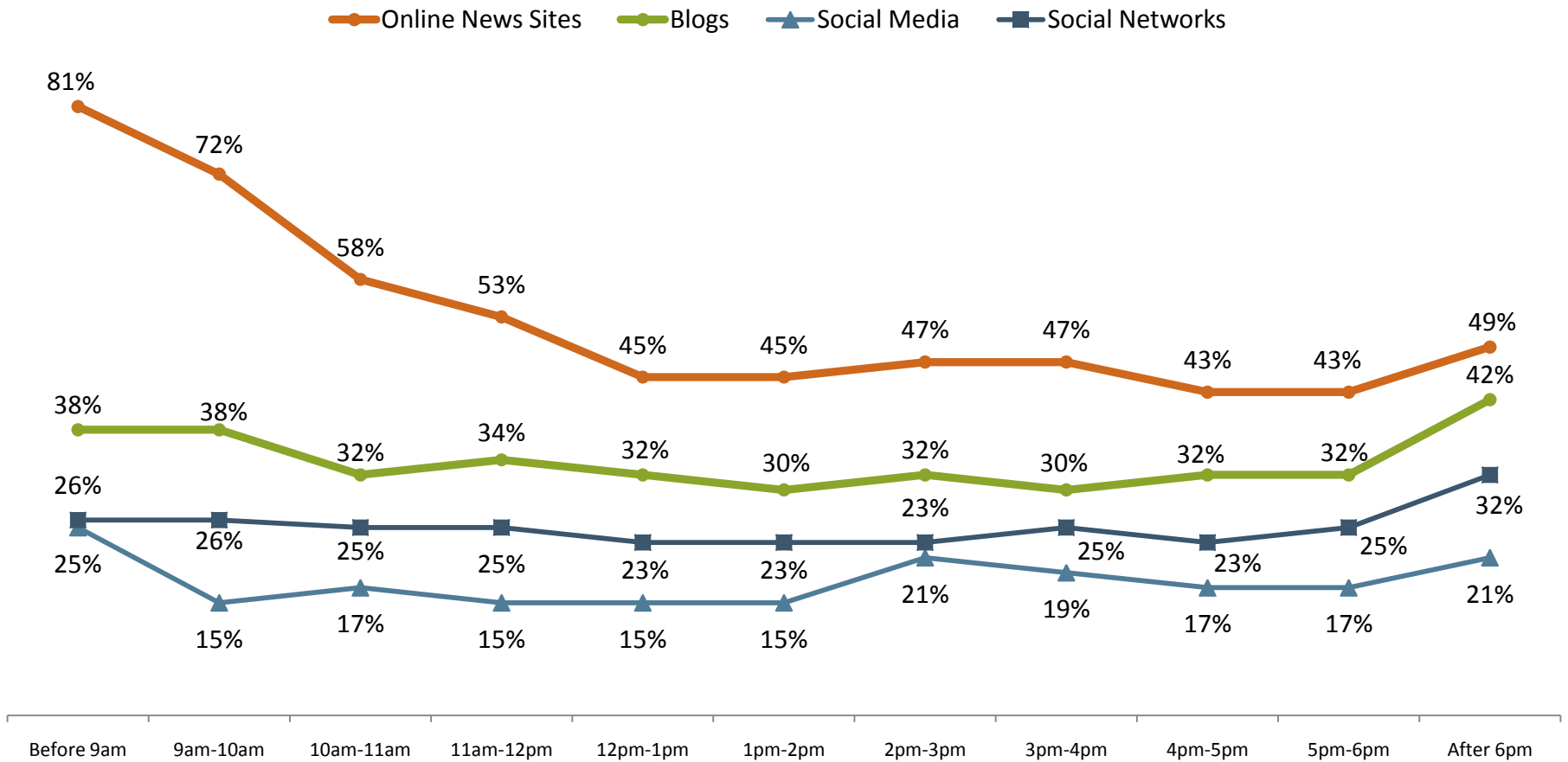
Compared to staffers in other countries, France staffers are most likely to write original, policy-related blog posts



France

Which, if any, of the following activities do you do?

France staffers access social digital media throughout the work day



France

Summary of United Kingdom Staffer Data

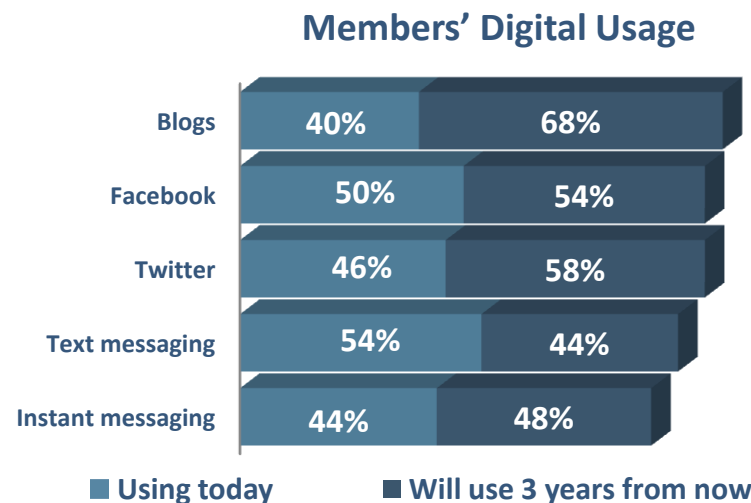


% Total Effective	Effectiveness of Outbound Digital Communications		
	2009	2010	Change
Websites	37%	76%	+39
Text messaging	n/a	40%	n/a
Online advertising	6%	32%	+26
Podcasting	n/a	32%	n/a
Online videos	4%	30%	+26
Blogging	7%	28%	+21
Micro blogging	6%	26%	+20

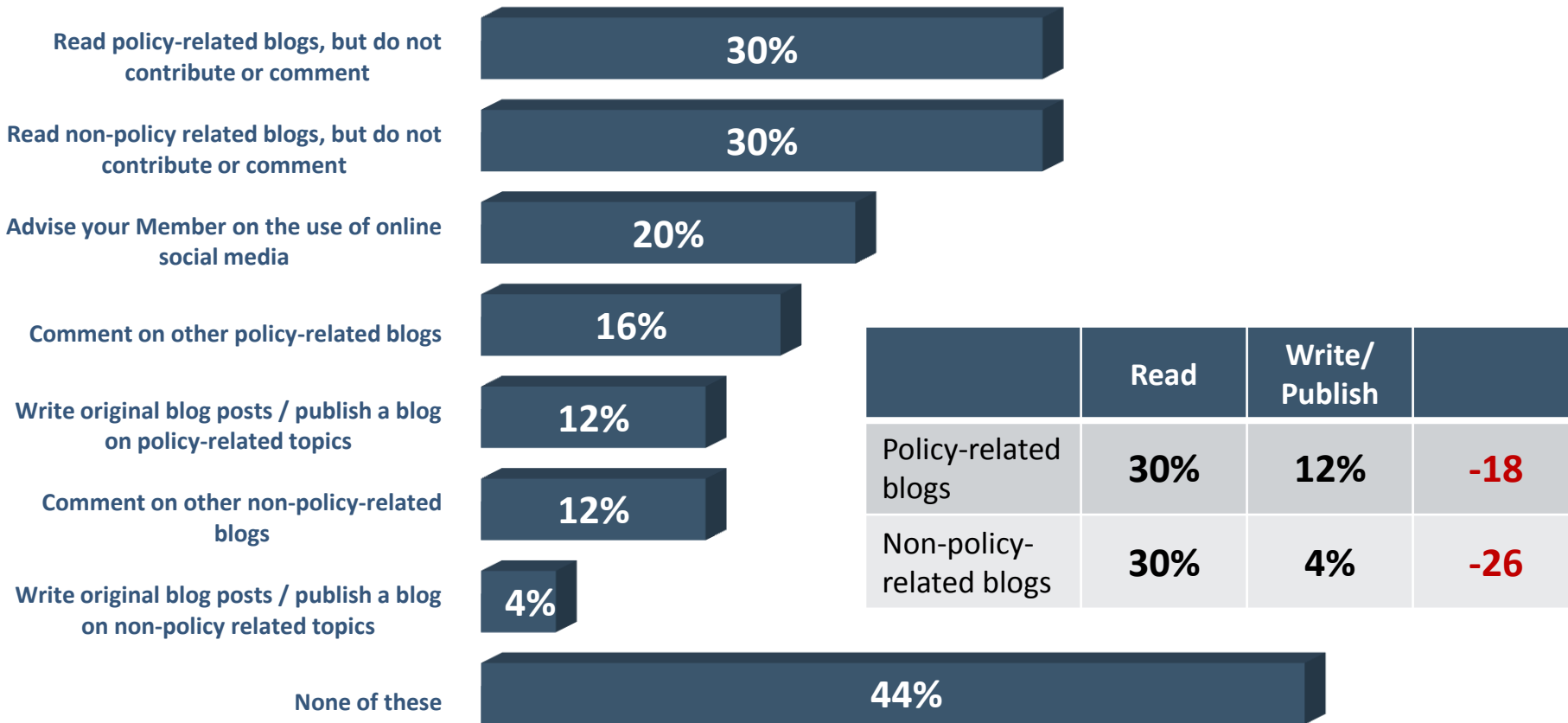


% Total Effective	Effectiveness of Inbound Digital Communications		
	2009	2010	Change
E-mails	94%	86%	-8
Member's blog/website	18%	70%	+52
Member's Facebook page	15%	26%	+11
Mobile interaction	9%	22%	+13
Twitter	n/a	24%	n/a
Comments posted on YouTube	n/a	14%	n/a

Most Trusted Online Sources for Policy Analysis	2009	2010	Change
BBC	19%	28%	+9
Newspapers	4%	14%	+10
Research/notes of analysis	n/a	14%	n/a
The New York Times	5%	8%	+3
News sites	n/a	8%	n/a



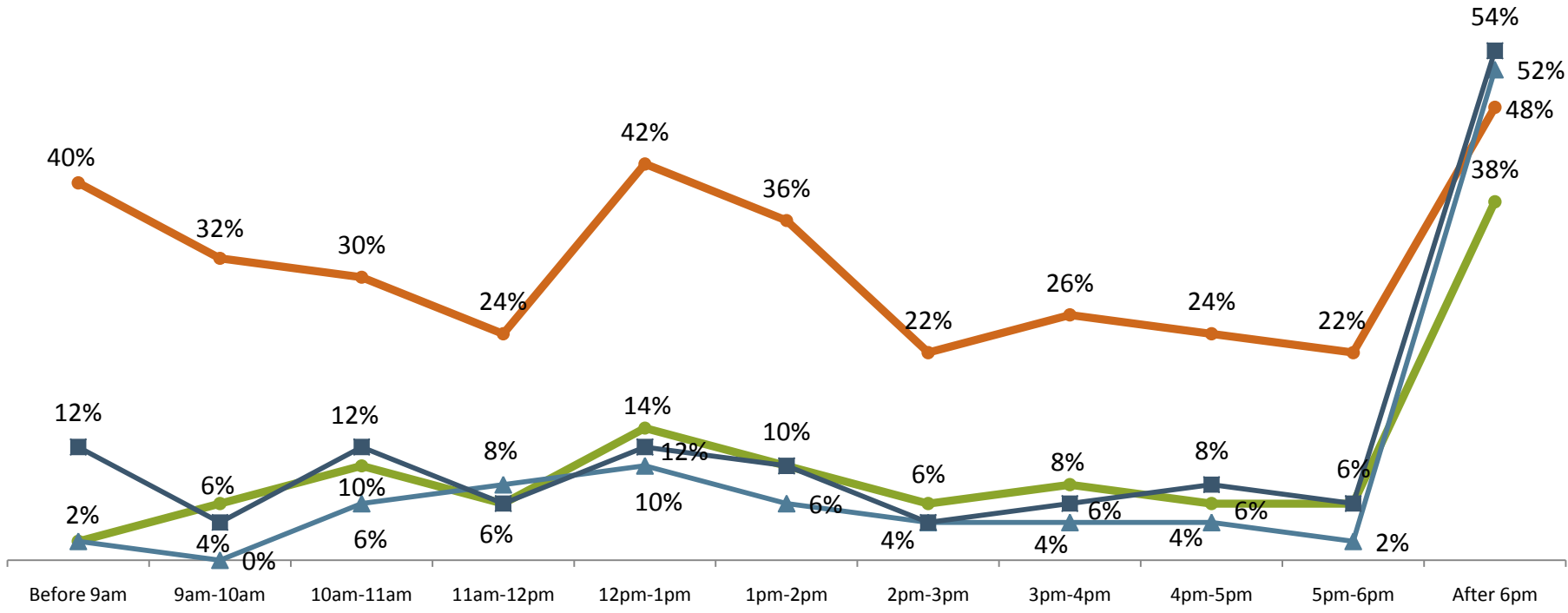
The majority of U.K. staffers rarely read blogs or write original blog posts



United Kingdom

All sources follow the same time trends in the U.K.; staffers' access to online sources increases dramatically after work

—●— Online News Sites
 —●— Blogs
 —▲— Social Media
 —■— Social Networks



United Kingdom



Jere Sullivan

jere.sullivan@edelman.com

+202-772-4035

Sparky Zivin

sparky.zivin@strategyone.net

+202-326-1708



Merci!
Danke!
Thank you !