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Summary -Federation Communication Survey 2004

Communication Trends around European Federations in EU Brussels

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INTRODUCTION

Typically the tasks of a European Federation's secretariat based in Brussels include:

- representation of their members to the EU Institutions
- broader communication, in some cases
- informing members about activities of the EU
- providing access to committees

Traditionally, these tasks have been done via face-to-face meetings and written information in the form of letters and reports. But wider stakeholder communication has become also essential to traditional lobbying, and technology is changing the way European Federations accomplish that. Online communication including Emails, Websites, Extranets, Intranets etc. help keeping in touch with members and increase the speed of decision-making within the federations.

EurActiv conducted a survey to check the strategy and technology within European federations. The attention given to the survey was highly satisfactory, with a response rate of 20%. Here are the results:

HOW FEDERATIONS COMMUNICATE TODAY

First of all, a few general numbers on the participating organisations of this survey. Just over half of the federations surveyed were founded before the Single European Act (SEA) in 1986 and represent the early birds among the European federations. According to Teuber (2002) the majority of today's associations were founded only after the SEA, which indicates that the federation audience of EurActiv probably consists of mostly established organisations in Brussels. Furthermore, 57% of the federations responding are small with regard to the number of their employees (small=1-5 employees), while 26% are of middle size (6-12 employees) and 17% big with more than 13 employees. This mirrors the whole population of European federations in Brussels, of which many are small in nature (Greenwood, 2002). It is interesting to note is that as late as 1996, only 30% of the federations used online communication, while the rest experimented with online communication between 1997 and 2000 at some point.

Favourite Communication Channels

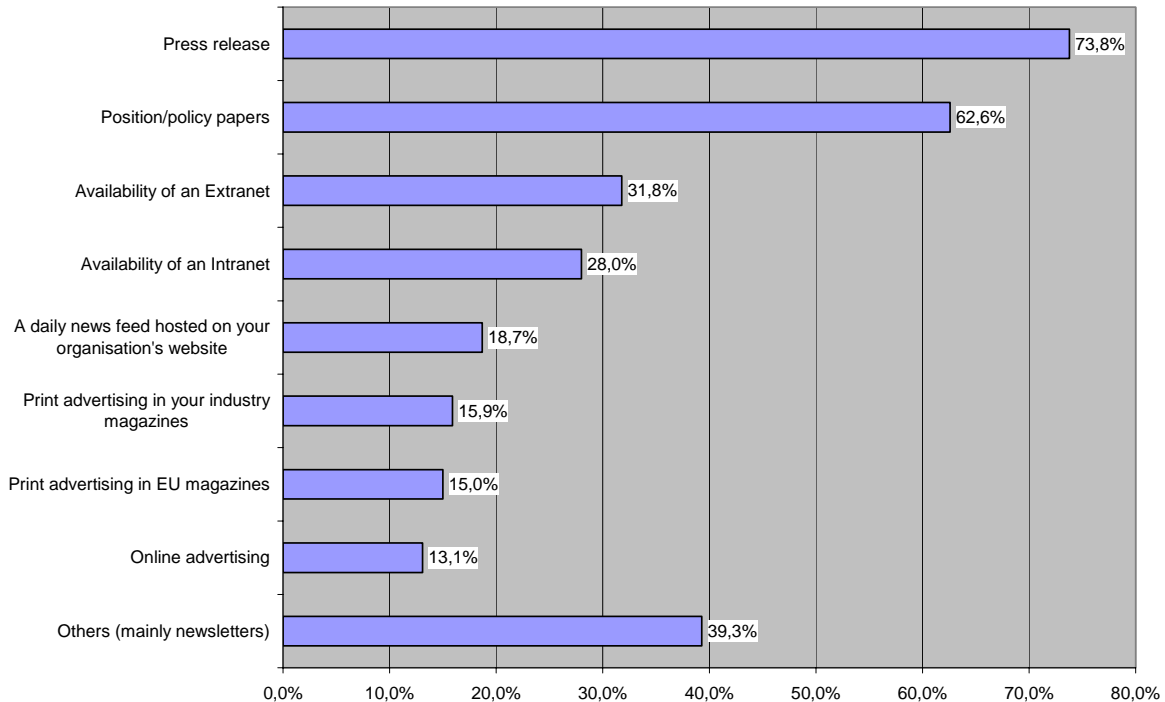
The survey shows that 40% of the federations responding still do not use Intranet or Extranet to keep in contact with members and partners. Less than half of the large federations (47%) actually offer Intranet / Extranet to their members.

With regard to the importance of various means of communication, the respondents believe meetings still to be the most important (68%), followed by the composition of policy papers (67%). In 3rd and 4th place we found emails and updated websites to be important for communication these days. These results are very similar to earlier research conducted by Burson-Marsteller/BKSH and Wirthlin-Europe from spring 2003 called "A guide to Effective Lobbying of the European Commission", graph "Best way of communicating information" (Survey of Senior Commission officials). The four following communication methods were ranked in order of their effectiveness in communicating to the public: written material, meeting, email and website. Only the order is slightly different – federations gave most importance to meetings, while the senior Commission officials preferred written material over meetings, email rested in both cases in third place and an updated website in 4th place. This confirms Burson-Marsteller's and Wirthlin-Europe's theory that email "has superseded the phone as preferred

means of rapid communication" since phone calls came in 6th place in the federation survey and in 7th place in the survey by Burson-Marsteller/Wirthlin-Europe.

The graph below shows how federations encourage visits to their websites.

Means to drive traffic to the federation's website



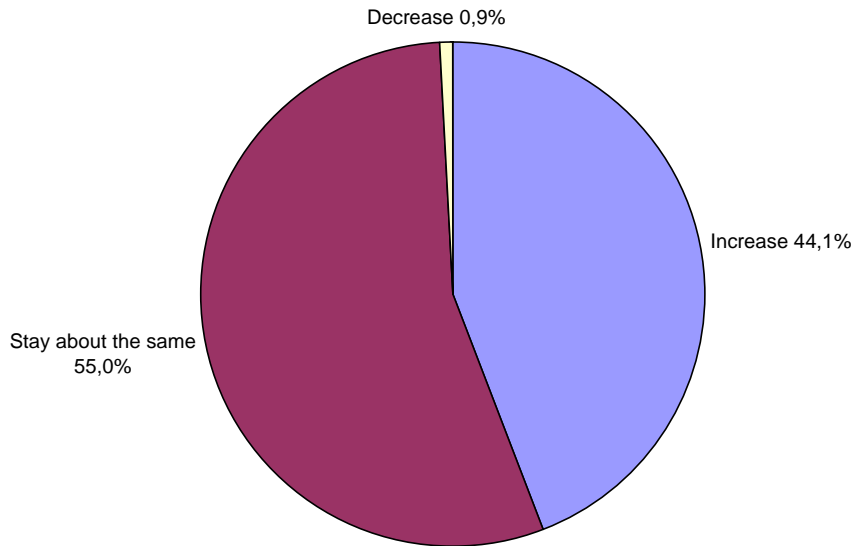
This is still usually done by writing press releases (73%), position papers (67%) and/or sending electronic newsletters (30%) to their contacts. Already 13 % of the respondents, however, found advertising online a useful tool to increase visits to their websites.

Current Use of Consultants and Staff Functions

In contrast to EurActiv's results of the corporate survey, where about 57% of the respondents mentioned the use of different consultants for different tasks within the organization (mainly Public Affairs, Public Relations and/or Communication), the federation survey shows that only 27,5 % of the federation use different consultants for different tasks. It also shows that, while only 30% of the corporates mentioned not to use consultants at all, 61 % of the federations do not employ consultants for any tasks. This characteristic seems to be spread evenly among the small, middle and large sized federations. For example, 47% of the large federations do not use consultants, while another 47% of large federations employ different consultants for the different tasks.

On another staff issue, the respondents to this survey believed with 55%, that their communication staff will stay as it is in terms of size for the next 5 years, while 44,1% actually believe in an increase of communication staff during that time (see more details in the graph below).

Number of communication staff around 2009



Communication Budget

When it comes to the communication budget, many federations complain about budget constraints. Yet 30 % of the respondents can rely on a communication budget (not including staff costs) of more than 50.000 Euro per year, half of them on even more than 100.000 Euro per year. Here the relation between the size of a federation in terms of number of employees and budget seems to be obvious. 78% of the large federations belong to the group that possesses a communication budget of more than 50.000 Euro. One should keep in mind that the biggest group of federations has to work with a communication budgets of less than 10.000 Euros.

HOW TO IMPROVE COMMUNICATION OF FEDERATIONS

"The importance of and need for communication in European federations is often underestimated. Communication budgets should be increased and, if necessary, more people should be employed. However, there should also be an improvement in terms of methods (namely the Internet), transparency and willingness to communicate: in trade associations there is a general reluctance to communicate openly on certain issues." This remark by one of the respondents to the survey comments on two main issues that were touched by the survey: staff issues and budget concerns. Furthermore, the general debate on communication tools was taken into account by this survey, here the huge increase in Internet usage plays an important part.

Needed Communication Tools

When analysing the comments of respondents to the survey, clear visions of the future of communication were uncovered. Some "see a shift in communication with the European institutions: less technical dossier-related communication and more political communication to position properly the sector and its members."

Others proclaim it is very important to "provide leadership to members in setting strategy rather than waiting to respond to perceived or expressed needs of member company representatives, who themselves are often not communications professionals."

Future of Staff and Use of Consultants

One question in the survey deals with the increase or decrease of communication staff. One respondent replied: "This is an excellent survey, but please keep in mind that especially the smaller federations do not have separate employees for PA, PR, corporate communications, policy making, fact finding etc. All these various functions are combined, which definitively does not need to be a disadvantage since it allows a broader view on issues, and it allows integrating the various functions. Compared to larger organisations this sometimes allows smaller organisations to respond faster to new developments because there is more knowledge combined within the same person and because there are less people / bodies to be considered / consulted in the decision making process." Staff flexibility is a key issue, especially for smaller federations.

Another response indicates a new trend among small secretariats, who "are obliged to engage good "all-rounders". There is therefore a need to create a "pool" of specialised resources that we could outsource as and when required, for instance copywriters, translators, PR, communications, legal, fiscal and financial experts. In this way we can use our budgets efficiently to achieve the very diverse targets our members set us each year." This indicates that the 61 % of federations not using consultants yet, might become more interested and the need for consultants will start growing.

Further ideas for improving communication of European federations in the next 5 years include the following:

- Communicate in short, to-the-point messages;
- Repeat messages in various circles;
- Alliance building with other federations on issues of common interest.

Budget Hopes

With regard to the future of communication budgets, the responding federations were quite clear in their reactions. While one respondent mentioned that communication is still regarded as a "necessary evil" and not given the means to develop as it should, others already look into further possibilities that allow an organized and effective communication, with the present budgets: online communication. "Online is our only option in view of budget constraints we are also faced with 1) refusal of national associations to share their member database with European confederation 2) no support from national associations"

CONCLUSIONS

Very important for federation in terms of communication is the face-to-face meeting, while the composition of position papers ranked in 2nd place and email in 3rd. A shift from technical communication to a more political communication going on at the moment in many small federations, could explain this preference. Dan Luca, Senior PR Manager at EurActiv comments: "Taking into consideration the interdependence of the European policies and the complexity of institutional mechanisms of the EU 25, progressively European federations are adapting their communication strategy. In the last two years branding, achieving visibility among the EU actors for their expertise, has become a priority for the big, medium, but also for small federations."

The use of Intranet and Extranet still has space to grow with 40 % of the federations still not offering such services. Though online communication is the way to go especially for smaller associations. 34% of the federations participating in this survey have less than 10.000 Euros per year for communication purposes. Online tools offer many possibilities to use that budget in the best possible way. Andrew Hawkins, Chief Executive of CommunicateResearch Ltd., believes:

While 61% of the federations do not use consultants at the moment, an increasing need in staff flexibility will probably increase the use of consultants at federations in the future. Julian Oliver, Secretary General of *Fondation Euractiv*, interprets the situation the following way: "the take-up of online communications is clearly on a strong upturning but many federations are still constrained by either budgets or tradition from taking maximum advantages of these increasingly available technologies"

METHODOLOGY NOTE

The survey was done between 7 July and 13 September 2004, promoted by postal mail, e-mail and telephone to 550 European federations. 109 answers were received, mostly on a web-based questionnaire hosted by CommunicateResearch Ltd.

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