The State of Public Affairs
2020 Industry Survey
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Welcome to the State of Public Affairs in 2020!

To put this report together, we surveyed 600+ public affairs, government relations, public policy, corporate and external affairs, and grassroots and advocacy professionals across the country, —representing every industry in the global economy.

From companies in the Fortune 500 list, to the largest trade associations and nonprofits, as well as law and lobby firms, our respondents provided insight into the current state of the industry and gave their predictions for 2020 and beyond.

We bring you those results here in a comprehensive report.

We asked participants everything from what was bothering them in their jobs, what was working well for them and their organization, and what their vision for the future of their industry and working life might look like.

The results?

An in-depth snapshot into some of the top trends heading our way in 2020 and what teams and organizations need to be prepared for in a constantly changing, global market.

With political uncertainty, a distributed workforce, instantaneous news cycles, and social media providing direct conduits between the public and organizations, being a leader in the public affairs space has become more challenging than ever before.

We saw that time and again in this survey.

Respondents had a lot of opinions, and the results are fascinating, informative, and sometimes surprising.

Read on to find out more.
Who Were the Participants?

Our respondents were affiliated with a wide variety of industries and organizations giving us a diverse set of backgrounds to draw these insights from.

Most respondents came from corporations and nonprofits, with strong representation coming from the association and law/lobbying firm spaces.

Also factored into our survey were individuals from the consulting space that work for organizations that either retain external lobbyists, or do not have an in-house affairs team.

Some of the multiple industries that our respondents represent included:

**Healthcare/Medical**  
**Technology**  
**Education**  
**Oil, Gas, and Mining**  
**Food and Beverage**  
**Automotive Manufacturing**  
**Pharmaceutical/Chemical**  
**Government**

As many organizations are changing and adapting to meet emerging technologies and competitive landscapes, they operate across multiple industries to meet the needs of clients and the market. As such, some of our respondents were able to select multiple industries and sectors at once.

In addition to the multiple sectors and industries represented, our respondents came from organizations of all sizes. We surveyed people that work in organizations with less than 5 people, all the way up to several multinationals with over 1,000 employees.
How They Identified

As this was a government relations industry survey, it’s no surprise that almost 70% of our participants described their current role as “government relations,” largely federal and state government relations. Those identifying as advocacy and grassroots professionals made up the next largest cohort of individuals, with regulatory affairs coming in close behind as the third most common job role.

Within the various different job functions, over 55 percent of our respondents came from those holding director titles or above, and 25 percent of all respondents identified as being in C-Suite and Executive Team member roles.

With more than half of all the answers coming from senior level titles, and a quarter from the C-Suite, the results give us important insights into how leaders in this space are thinking about the future of the public affairs industry.

What is your current job level?

![Job Level Bar Chart]

25% C-Suite Respondents
Stability and Longevity Rule

One of the first surprises we encountered was that while governments and administrations come and go, government relations is not necessarily the transient, “revolving door” job you might think. Over half of our respondents have stayed at their current organizations for 6+ years, while the majority of respondents, 37 percent, have been in their current employment for 10+ years.

How long have you been at your current organization?

- 26%  0 - 2 Years
- 20%  3 - 5 Years
- 17%  6 - 10 Years
- 37%  10 + Years

54% have been at their org for more than six years
Teams Are Staying Small

Over 50 percent of our survey participants are on small teams with headcounts of between 1-3 people. Conversely, slightly more than 12 percent of our 600+ respondents work on a team with 10 or more colleagues.

How many employees are on your direct team?

2/3rds of teams have less than six people
The Power of Influence

While it’s seen as a constant challenge for public affairs professionals and teams to influence their business or organization, our survey showed that many, especially those at the highest levels, do, in fact, “have a seat at the table”.

A whopping 320 respondents, more than half of the total, said they report directly to the C-Suite. Almost 100 answered that they reported directly to the Board of Directors.

This bodes well for those working in the space in general, as more organizations are viewing public affairs as less of a cost center and giving them direct access to, and influence on, the C-Suite.

Who does your team or department report to?

- 56% Executive Team
- 16% Board of Directors
- 17% Other
- 16% Communications
- 2% Business Development
- 4% General Counsel / Legal
- 3% Membership
- 3% External Affairs
- 1% Other

More than 1/2 report directly to the C-Suite
Beyond the Beltway

Public affairs is no longer just a Washington D.C. function.

The vast majority of responses to the question: “Where are you and your team located?” came from around the country. This change has made communication and staying on top of issues and messaging increasingly more important, as teams work across time zones, portfolios, and different levels of government.

- 30% Washington D.C.
- 52% Around the US
- 5% International
- 13% Remote

Where are you and your team primarily located?

Only
1/3
are in D.C.
Diversity Still a Challenge

Despite a strong industry focus on increasing diversity and inclusion across all industries and sectors, we found public affairs is still a predominantly older, male world.

Fifty-nine percent of our respondents identified as men, and almost 55 percent of responses to the question, “What is your age?” were from the 55+ age group, with 6 percent saying they were 75 or older.
Third Level and Beyond

Professionals that work in this space are highly-educated and driven in their intellectual pursuits. Almost 40 percent had a masters degree and almost 10 percent had earned a PhD.

And it sounds like you chose well in college. Two-thirds said their primary degree is related to their job.

What is the highest level of your education?

- 36% Bachelors
- 38% Masters
- 8% PhD
- 8% Other
- 7% Associates
- 3% High school / GED

Is your primary degree related to your job?

- 68% YES
- 32% NO
Dream Job, or Not?

Although you chose a related degree in college, there was a clear divide in responses to the question: “Did you intend to work in government relations or advocacy?” Just above 50 percent said, “Yes,” and slightly less than 50% said, “No.”
Public Affairs is Getting More Complex

The following section dissects the responses to current life at work, and the complexity of the stakeholders and sheer number of issues government relations teams interact with regularly.

When asked questions such as: “How many public policy issues is your organization currently following?” it became apparent quickly that public affairs is rapidly becoming more fraught, given the sheer volume and complexity of legislative and regulatory issues being worked on.

Almost a third of respondents said their organization is currently following over 10 public policy issues, with almost 18 percent saying they follow over 20 public policy issues. Contrast that with the earlier responses that teams are staying small and you’re left with a staggering amount of information that organizations need to discover, monitor, and report on to internal and external stakeholders.
How many public policy issues is your organization currently following?

- 18% 1 - 3
- 24% 3 - 6
- 25% 6 - 10
- 15% 10 - 20
- 18% 20 +
Who Sets the Agenda?

How teams decide which issues to follow is complex.

Roughly 34 percent said their own organization and team sets the issues priority agenda. Interestingly, coalitions deciding what issues to prioritize came in at the bottom of the heap with only 3 percent.
Staying on Top of the Volume is Tough

Seventy one percent of responses indicated that the number of issues has increased since they joined their respective organizations. Of that 71 percent, over 30 percent said the number of public policy issues has increased significantly. That’s a trend that shows no sign of abating with more legislation being passed at state and international level, and it’s expected to increase more in the coming years.

19%  Has not changed
41%  Has increased slightly
31%  Has increased significantly
2%   Has decreased slightly
1%   Has decreased significantly
6%   Does not apply
**Time, Money, and Resources**

Public affairs teams are concerned about budgets, are understaffed, and don’t have enough time to do everything.

The top three biggest challenges affecting your role were a lack of spending power, too small a team, and too little time to accomplish all the goals set before you.

Other concerns listed included not being able to quantify and report your value, and the immense volume of public policy issues that teams are being asked to manage and monitor.

**What are the biggest challenges you face in your role?**
Working Across Internal Silos

The main team that public affairs collaborates with the is Executive team.

But, what’s the 2nd most worked with team? Almost a quarter of respondents said the Communications and PR department is the most interacted with. Surprisingly, very little collaboration is done with business development, membership services, and legal departments, with each of those teams sitting at less than 10 percent each.

Which internal departments do you collaborate with most often?

- 38% Executive team
- 23% Communicates / PR
- 9% Legal / compliance
- 6% Marketing
- 6% Business development
- 6% Business development
- 6% Membership services
- 3% Procurement / operations
- 11% Other
Working with External Stakeholders

The results showed that working with external stakeholders and teams is critical to your success. Over 80 percent of people surveyed said collaborating with outside groups and teams is necessary and vital to the success of their own jobs, and the work of their organization.

Is collaborating with external organizations (other than lawmakers and their staffs) critical to the success of your team’s goals?

- **YES**: 80%
- **NO**: 11%
- **NOT SURE**: 9%

4/5ths say working with external stakeholders is essential.
# Building Relationships Still Key

No prizes for guessing who was most important when it came to building relationships.

The vast majority of respondents identified lawmakers, closely followed by staffers, as the key relationships in their world.

Grasstops got the lowest ranking of the choices given, despite the fact that effective grasstops research and leveraging can help significantly with building those relationships with staffers and lawmakers.

## How important is building relationships with the following groups?

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<thead>
<tr>
<th>Group</th>
<th>Overall Rank</th>
<th>Rank Distribution</th>
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<tbody>
<tr>
<td>Lawmakers</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Staffers</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Grassroots</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Industry Peers</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Grasstops</td>
<td>5</td>
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</tbody>
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Lowest Rank: Lawmakers  - Highest Rank: Grasstops

Lawmakers are your target #1
Biggest Impact?

We asked you to choose from a list of seven options to tell us what has most impacted your industry in recent years.

Overwhelmingly the response was regulatory activity, with more than 50 percent mentioning it as the number one issue.

Others high on the list were a divided Congress, social media, and technological advancements, which all got mentioned by more than 40 percent of you.

Which of the following has had a significant impact on your industry in recent years?

- Technological advancements
- Social media
- A divided Congress
- 2020 elections
- Strength of the economy
- Regulatory activity
- Other

50% say regulations are their #1 issue
Tools of the Trade

We asked what was essential for you to do your job, and given your need to stay on top of monitoring all those issues, it wasn’t surprising you listed news subscriptions, legislation trackers, and having lobbyists and consultants as your top three.

What tools do you use to do your job?
"Go-To" Sources

We asked you to rank the importance of certain sources for your day-to-day job.

It turns out that it’s not just news subscriptions that are important for you. It’s the right type of news subscriptions. Policy news got by far the highest ranking when it came to importance for doing your day-to-day job. That was followed by official government documents.

Interestingly, social media was far down the scale in terms of an important source for your job, coming in at just number 5. While you’d mentioned it as one of the bigger impacts on your industry over the last few years in an earlier response, it’s clear you don’t rank it highly as a news source.

Rank the importance of these sources for your day-to-day job:

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<th>Item</th>
<th>Overall Rank</th>
<th>Rank Distribution</th>
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</thead>
<tbody>
<tr>
<td>Policy news</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Official government documents</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Mainstream media</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Internal documents (i.e., memos, internal policy guidelines, etc)</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Social media</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Non-government documents (i.e., think tank analysis)</td>
<td>6</td>
<td></td>
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<tr>
<td>Other</td>
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Issues, Issues, and More Issues ....

We know from your previous responses you’re drowning under the sheer volume and complexity of issues, with teams that are too small. But we wanted to dig in a little deeper and see where those issues are coming from, and where you think they’ll grow in the future.

To do that we asked you a series of questions about which bodies of government you expect to see shape the landscape in the next five years.

Right now most of you are still predominantly following the issues at federal and state level, with the breakdown being 45 percent tracking federal, and 40 percent monitoring issues at state level.

Significantly smaller numbers are watching the issues at local and international levels.

At what level are your issues mostly based?

- 40% State
- 45% Federal
- 11% Local
- 4% International

But this is where you say things are about to rapidly change.

When we asked you whether you expected federal, state, and international legislation and regulations would have a stronger or weaker impact on your organization’s success in the coming years, you answered with a loud YES to all of them.
Which will have a greater impact on your organization’s success in the next few years?

While 11% of you said you currently concentrate on international policy, almost three times as many felt international regulations and legislation would have a greater impact on your industry in the next few years. A little over half of you felt that the federal government would have a stronger influence, and 60% of you thought state legislation or regulations would have a big effect on your industry in the near future.

Do you see the federal government having a stronger or weaker impact on your organization over the next five years?

Do you see state legislation/regulation having a stronger or weaker impact on your industry in the next five years?

Do you see international legislation and regulations having a greater impact on your organization’s success in the next five years?

39% 31% 30% 11% 9%
32% 60% 9%
39% 30% 31%
Scope of Legislation

When it came to the scope of what would be included in bills going forward, 64 percent of you believe we’ll see more omnibus type bills in the coming years. Only 5 percent expect scope to decrease.

The same was true for advocacy and grassroots. A huge 60 percent of you see advocacy grassroots and grasstops movements having a greater impact on your organization’s success in the next five years.

Do you see the scope of what’s included in bills increasing or decreasing over the next five years?

- 64% Increasing
- 5% Decreasing
- 31% Staying the same

Do you see advocacy (grassroots / grasstops movements) having a greater impact on your organization's success in the next five years?

- 68% Yes
- 17% No
- 15% We don’t participate in advocacy
The Stress Section

Government relations is not the space to be in if you want a relaxing career by the sounds of your answers as to what causes you anxiety, what you think you miss, and how much reporting you have to do.

When it comes to the stress test. Bad news we’re afraid, the vast majority of you are failing it.

Almost two thirds of you said your job was stressful or very stressful, with a fractionally larger amount saying they saw their job becoming even more challenging over the next few years.

That’s not surprising given the increasing number of issues at all levels of government you have to monitor, the stakeholders and relationships you have to manage, and the sheer number of sources you need to stay on top of.

How stressful is your job?

- 56% Stressful
- 29% Not Stressful
- 12% Very stressful
- 3% Other

Do you see your job becoming more challenging over the next few years?

- 68% Yes
- 17% No
- 15% Uncertain

2/3rds are stressed!
Main Stressors

We asked you what caused the most anxiety in your day-to-day job and overwhelmingly you said time constraints.

The current political environment isn’t helping at least 50 percent of you either, while a lack of resources and a fear of missing something important in legislation or regulations kept at least 40 percent of you up at night.

Not being able to show the value or impact of your team rounded out the top five.

What causes the most anxiety in your day-to-day job?
What's Slipping Through the Net

We’re not that surprised you’re stressed to be honest, given that 61 percent of you said you missed the occasional bill or regulation update, and 17 percent admitted they missed a significant amount in a busy year.

How much important information related to your issues do you estimate you miss annually?

- 7% I never miss anything
- 61% I miss the occasional bill or regulation update
- 17% I miss a significant amount in a busy year
- 15% I don’t know

61% say they miss something
Reporting is Eating Up Your Time

It doesn’t help that you have to spend a large amount of your time briefing and creating reports for stakeholders. Eighty-one percent of you have to create reports or briefs for internal stakeholders on a monthly basis, with a further 25 percent expected to produce reports quarterly.

How often do you have to create reports or briefs for internal stakeholders?

Almost 40% have to create a report every week.
What Would Help?

We wanted to see what might help.

First we asked you what would make your day-to-day lives at work easier.

It would seem that many feel they’re falling behind on staying up to date on their careers, as number one and three were best practices and professional development for government relations. The second most cited thing that would make your lives easier was accessing briefing and reporting templates.

Which of the following would make your day easier?
Who Would You Hire?

Given your small teams, lack of resources, and stressed out lives, we rounded out the 2020 survey by asking if you could hire additional roles in your department or team this year, what would they be?

There weren't any real surprises.

You all want more staff on your teams. Thirty one percent of you would like a policy specialist, while 29 percent would take a lobbyist or consultant. A little under a quarter of you each said you'd like an advocacy specialist or someone in communications.

If you could hire additional roles in your department this year, what would they be?

31% want a policy expert
Conclusion

More than two thirds reported that the volume of issues to be managed, plus a lack of time and budget was the number one challenge in their role.

That means the argument for digitizing has never been stronger.

Add the fact that a huge number of you have to report and collaborate cross-departmentally, as well as internally and externally weekly, implementing technology solutions to support your team has become not just a priority but a necessity.

Just as tech innovation has driven the development of new products, services, and business models, it is also delivering new ways of managing a public affairs strategy.

Cutting edge technologies like FiscalNote allow government relations, corporate and external affairs, grassroots, and legal teams stay ahead of the issues affecting their industry.

Our survey found that government relations teams are often small and short on time and resources to be able to do their jobs effectively.

Through the integration of a technology solution like FiscalNote, departments from multinationals to nonprofits, associations, law and lobbying firms receive timely information and analytical insights about trends and public policy issues.

Eighty percent of you said external stakeholders were essential to your role and organization, but without an effective and proactive approach to managing those interactions and relationships, it’s all but impossible to connect the dots and show ROI for your department and organization.

In this new age of uncertainty, the ability to streamline collaboration, report effectively to your team and executives, and communicate to the public around policy issues will be critical for an election year and beyond.
YOU need to organize campaigns, engage supporters, and measure your impact, while ensuring that your message is heard by those with the power to enact change.

FiscalNote Advocacy offers solutions to promote action and engage with the right stakeholders, as well as assess your efficacy and drive results.