THE POLICY INSIDER'S REPORT: SHAPING POLICY IN AN ERA OF UNCERTAINTY

POLICY PROFESSIONAL BENCHMARK REPORT

POLITICOPRO

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INTRODUCTION

HOW ARE POLICY PROFESSIONALS FARING IN AN ERA OF UNCERTAINTY?

That's the question we set out to answer when we interviewed more than 1,400 policy professionals in March of this year. In a Washington characterized by political, technological and social upheaval, we wanted to better understand the experiences and challenges of experts responsible for influencing policy at the highest levels of government.

Our research included hundreds of government affairs, communications, public relations and legal professionals at corporations, associations, nonprofits and professional services firms. Across these categories, our findings were remarkably consistent. The interrelated forces of partisanship, legislative gridlock and political volatility have created an environment of persistent uncertainty that has transformed policy professionals' roles, created new barriers to their work and upended traditional approaches to influence (*Figure 1*).

> "I'm no longer dealing primarily with policy issues related to my company's industry. My firm asks for my help with everything from gun rights to labor issues and investor relations. We weigh in on more business decisions than ever before."
>
> SVP GOVERNMENT AFFAIRS

The first surprising finding from our work was the dramatic rise in corporate interest in politics and policy. Constant change on issues from trade to data privacy and regulatory policy has left business executives hungry for clarity – and they are demanding it from their internal and external government affairs teams. Most policy professionals at corporations now interact with their c-suites and business unit leaders at least once per week (*Figure 2*).

FIG. 1
POLICY PROFESSIONALS ARE STRUGGLING TO MANAGE UNCERTAINTY
% of policy professionals who rate each policy challenge among their top 3 this year

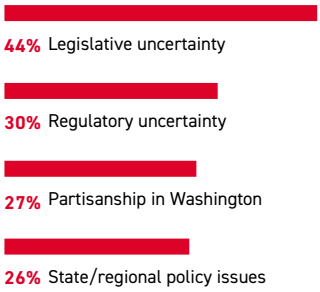
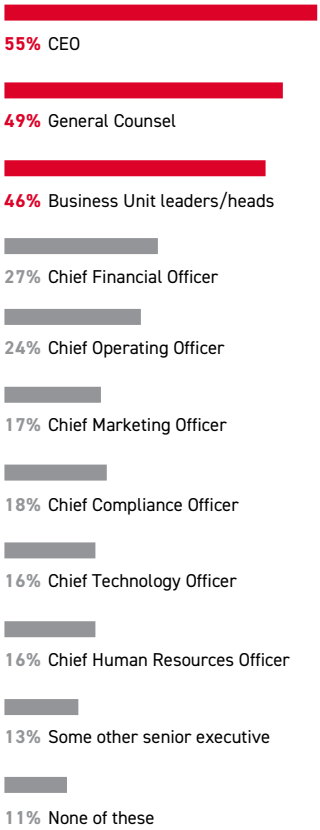


FIG. 2
POLICY PROFESSIONALS AT CORPORATIONS INTERACT WITH C-SUITES AND BUSINESS LEADERS ONCE PER WEEK
% of policy professionals who say they provide politics/policy updates to each of the below roles at least once a week

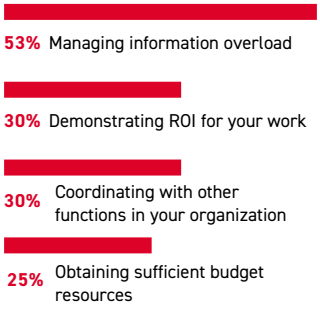


Amid heightened corporate demand for policy information, policy professionals are keeping pace with a wider range of issues and more jurisdictions than ever before. Traditional barriers between sectors on policy issues have diminished, and issues that would have at one time been constrained to the national stage now play out at the international, federal, state and local levels. Keeping up requires that policy professionals sort through troves of updates contained in government websites, news platforms and their inboxes. Pulling the signal from the noise is elusive: 53% of policy professionals cite "managing information overload" as one of their top three challenges this year (*Figure 3*).

Despite these continued challenges, we found in the responses to our survey a spirit of innovation and a sense of excitement about the future. In the next few years, policy professionals expect to make greater use of data and tools to simplify their workstreams. They are investing in developing new skillsets in digital media, advocacy and branding to adapt to a changing media and policymaking landscape. Our qualitative interviews with government affairs and other policy leaders surfaced emerging best practices, from rethinking team structures to make it easier to track issues to engaging new corporate stakeholders to help quantify the outcomes of policy efforts.

This report contains the most interesting, counter-intuitive and inspiring findings from our research. We hope you will use it to learn more about other policy professionals, benchmark your organizations' investments and time allocation and surface new best practices. We also hope that, upon reading it, you are prompted to share your own insights and best practices with us using the contact information we've shared below.

FIG. 3
INFORMATION OVERLOAD IS THE TOP CHALLENGE FACING POLICY PROFESSIONALS THIS YEAR
% of policy professionals who rate each functional challenge among their top-3 this year



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WHO WE SURVEYED

The data in this report represents the result of 1,409 total online interviews with policy professionals, including 848 who completed the survey and another 561 partial completes, for whom we've kept the data from the parts of the survey that were completed. All respondents were directly invited to participate in the survey by POLITICO.

FIG. 4
SURVEY RESPONDENT DEMOGRAPHICS

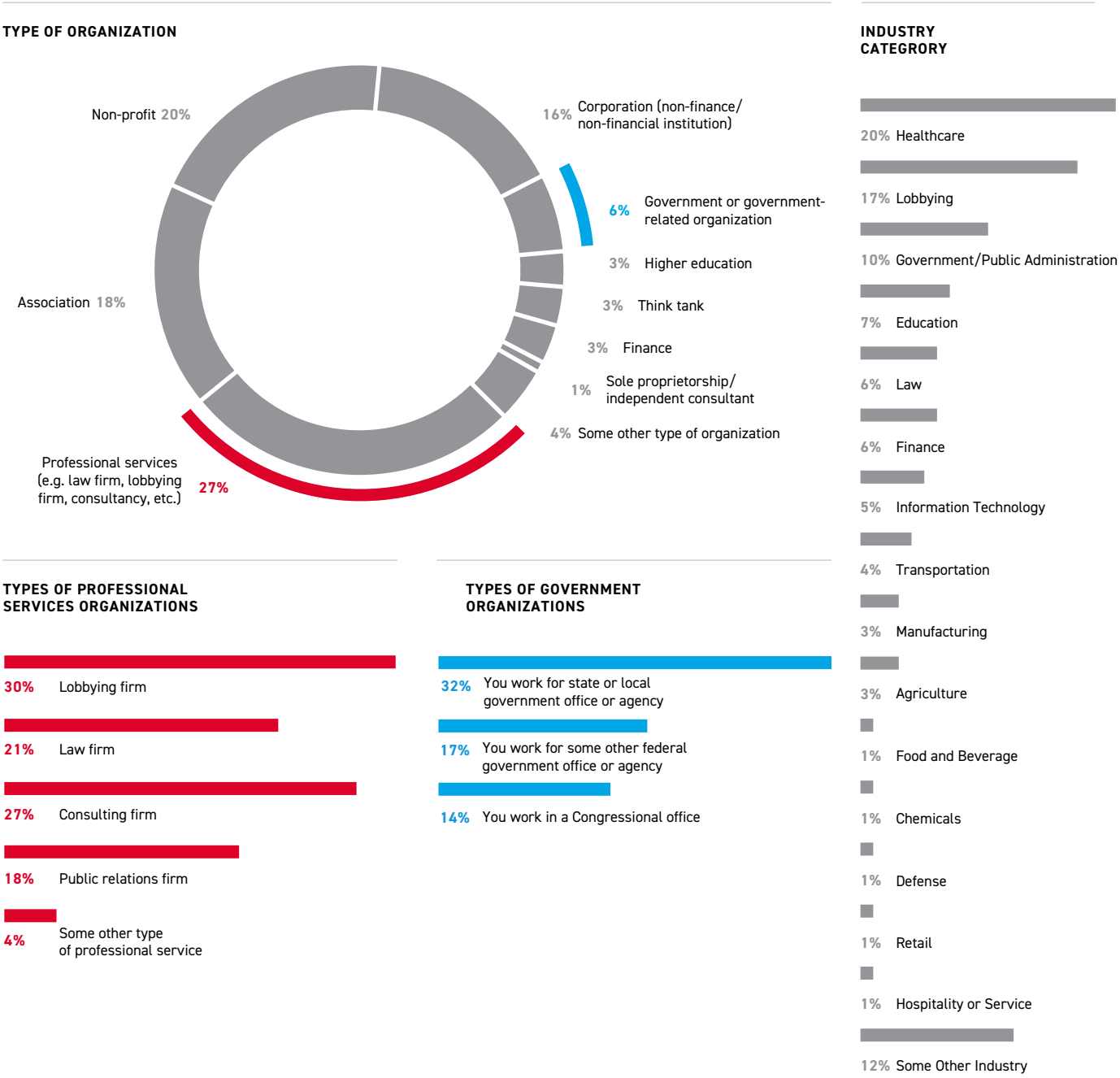
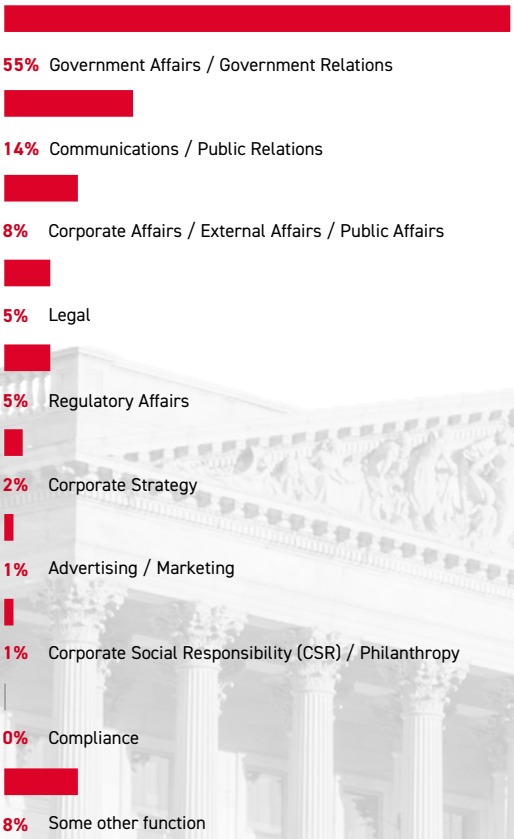
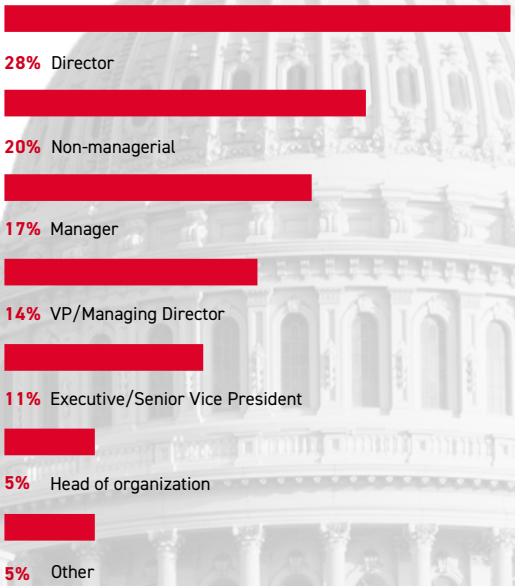


FIG. 4 *CONT'D*
SURVEY RESPONDENT DEMOGRAPHICS

ORGANIZATIONAL FUNCTION



LEVEL WITHIN ORGANIZATION

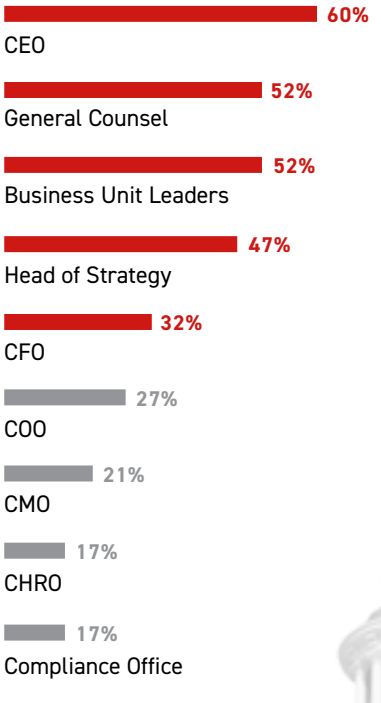


01 RISING CORPORATE INTEREST IN POLITICS AND POLICY

RISING CORPORATE INTEREST IN POLITICS AND POLICY

Policy expertise has always been critical to organizations' success, but heightened business uncertainty on issues ranging from trade to data privacy has given the discipline a new spotlight in board rooms and the C-suite. Today, most corporate government affairs teams need to be prepared to work with CEOs, General Counsels, and key business and strategy executives on a weekly basis *(Figure 5)*. These corporate leaders are concerned with ensuring their public policy-related business decisions reinforce their relationships to stakeholders, minimize risk and position their firms for long-term growth.

FIG. 5
BUSINESS LEADERS RELY ON POLICY PROFESSIONALS' COUNSEL
% of policy professionals at corporations who provide updates to each C-suite Executive at least once per week



n = 132 corporate government affairs executives
Source: Pro Benchmark Survey, May 2019

POLICY PROFESSIONALS IN THE CORPORATE SPOTLIGHT

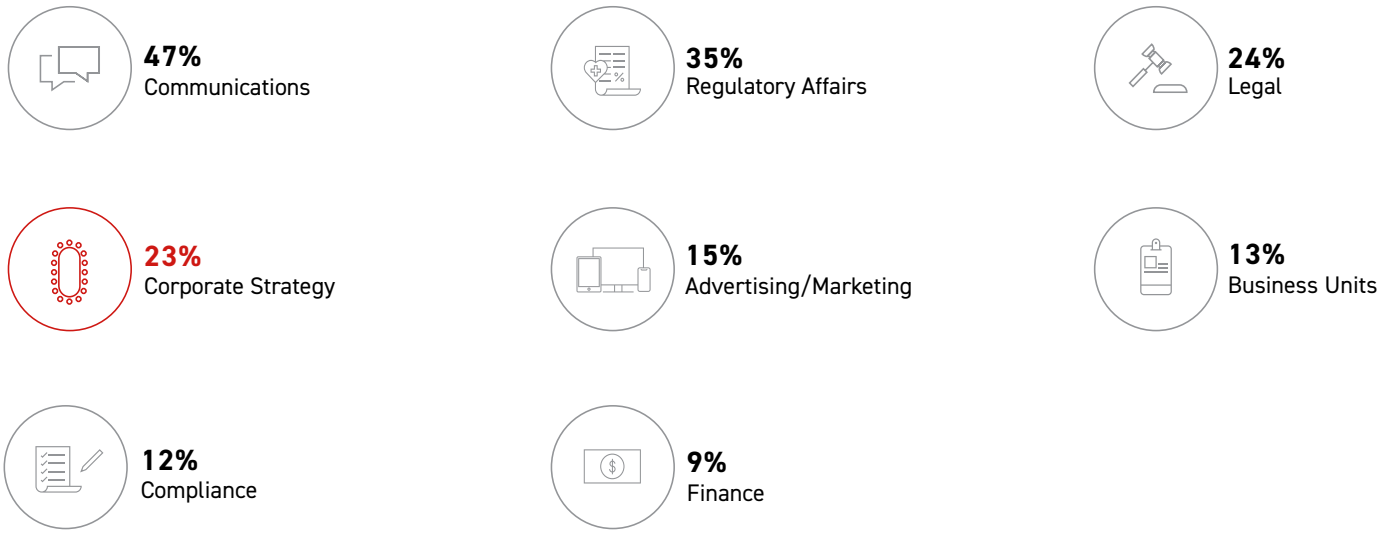
For policy professionals, this increased executive attention on policy issues is a welcome opportunity to weave legislative, regulatory and political risk into corporate decision-making. Many of the government affairs professionals we engaged in our research said their involvement in a broader range of corporate conversations helped them drive better long-term business strategies.

One area in which policy professionals' counsel has become especially valuable is social issue activism. With public and employee interest in social policy issues growing, policy experts are adding value by coaching executives on whether, when and how to respond to controversies. Through their unique understanding of the political environment, the trajectory of issues and the details of lawmaking and rulemaking processes, policy professionals help executives pick the right moments and mechanisms to act on the issues that matter to their stakeholders. For leading government affairs teams, it's become commonplace to outline official triage protocols for these types of decision-making processes.

Another surprising new area of demand for policy expertise derives from corporate strategy and investor relations teams. Investors are more aware than ever of public policy's impact on companies' growth. In the past few years, volatility on trade, regulatory policy and healthcare coverage, among other issues, have significantly impacted many firms' stock prices. Moreover, companies' positions on policy issues have become a key point of interest for investors, many of whom leverage corporate social responsibility (CSR) rankings to evaluate whether a company is worthy of investment. The policy professionals we spoke with described coaching their strategy and investor teams to deftly answer difficult questions about how political and policy issues will impact their companies' business plans.

Growing corporate interest in policy issues extends far beyond the C-suite and business teams. From human resources' asks for help on labor and immigration issues to finance's questions about progress on tax policy, today's policy professionals must be smart on issues that extend beyond their industry and traditional areas of responsibility.

FIG. 6
POLICY PROFESSIONALS COORDINATE
% of policy professionals who provide policy updates to the following functions at least once per week



> "My time spend has inverted – I used to spend 70% of my time with external stakeholders. Today, it's 30%."
>
> SVP GOVERNMENT RELATIONS

NEW DEMANDS ON POLICY PROFESSIONALS' TIME

While most policy professionals welcome heightened corporate interest in their work, it's also put new constraints on their time *(Figure 7)* and resources.

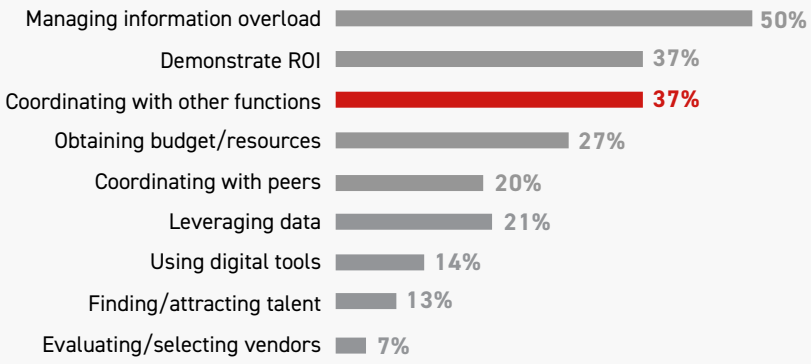
The work of translating politics and policy information for an audience beyond the beltway isn't easy. Many policy executives we spoke with described an almost-daily effort to contextualize political updates for business stakeholders. This meant making last-minute phone calls and writing quick turnaround briefs to paint a picture of how and when policy issues would evolve -- information that isn't readily-apparent in the headlines. Failing to do so could mean these policy professionals' companies or clients overreact, use incorrect or inadequate levers of power and create long-term headaches with government stakeholders.

FIG. 7
POLICY PROFESSIONALS AT CORPORATIONS SPEND MORE TIME MEETING WITH INTERNAL STAKEHOLDERS THAN ANY OTHER ACTIVITY
% of policy professionals at corporations who say each activity is among their top three areas of time spend

n = 139 corporate government affairs executives
Source: Pro Benchmark Survey, May 2019

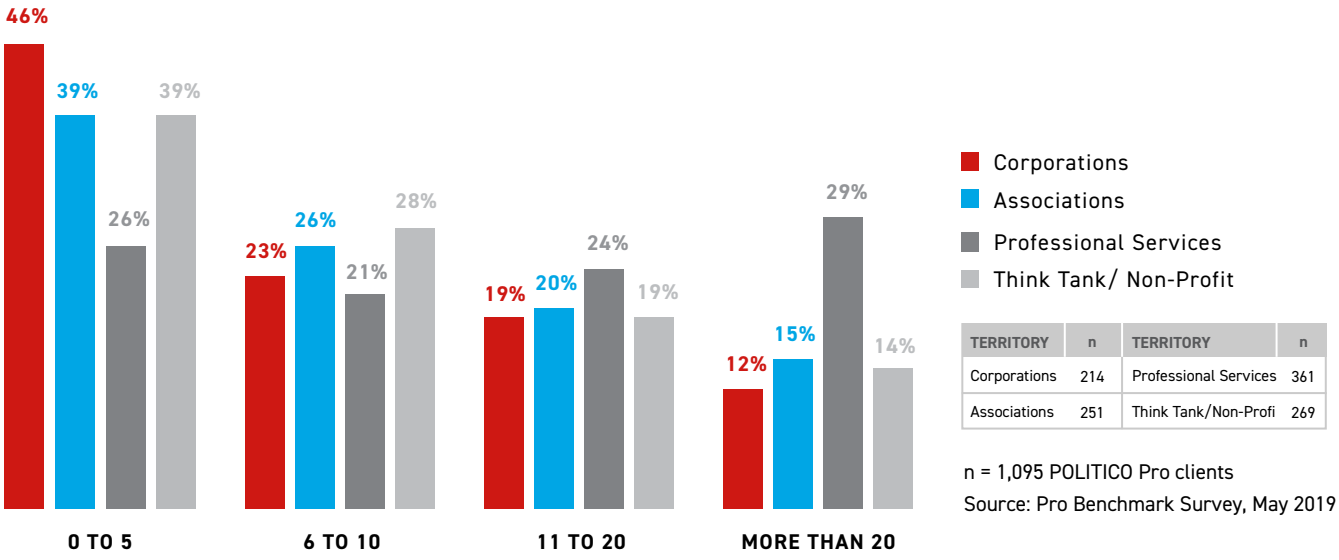
All this time spent translating policy internally constrains policy professionals' availability to influence stakeholders beyond their organizations. With less time to meet decision-makers on the Hill, engage the media and talk to customers and the public, many policy professionals have come to view cross-functional engagement as a pain-point *(Figure 8)*. The pain is particularly acute given that at least one-third of policy professional teams at corporations, associations and think tanks comprise five or fewer staff *(Figure 9)*.

FIG. 8
COORDINATING WITH OTHER CORPORATE FUNCTIONS IS AMONG POLICY PROFESSIONALS' BIGGEST CHALLENGES
% of policy professionals at corporations who say each challenge is among their top three this year



n = 339 POLITICO Pro users in corporations and associations
Source: Pro Benchmark Survey, May 2019

FIG. 9
MOST POLICY PROFESSIONALS' TEAMS HAVE FEWER THAN 10 EMPLOYEES
Policy professionals team size by organization type

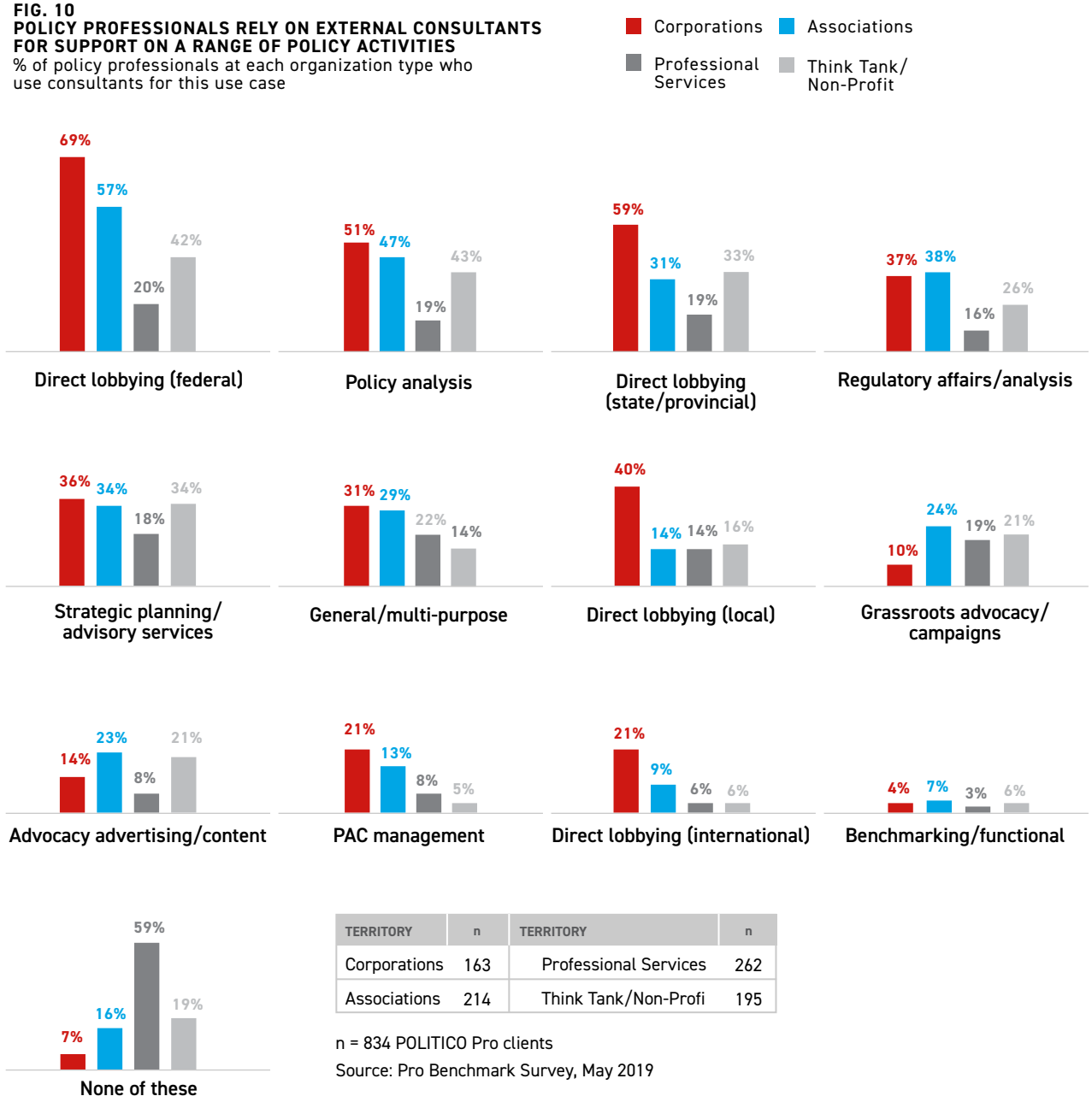


TERRITORY	n	TERRITORY	n
Corporations	214	Professional Services	361
Associations	251	Think Tank/Non-Profi	269

n = 1,095 POLITICO Pro clients
Source: Pro Benchmark Survey, May 2019

To meet the demands of increased interest in their work, many policy professionals turn to external support *(Figure 10)*.

FIG. 10
POLICY PROFESSIONALS RELY ON EXTERNAL CONSULTANTS FOR SUPPORT ON A RANGE OF POLICY ACTIVITIES
% of policy professionals at each organization type who use consultants for this use case



TERRITORY	n	TERRITORY	n
Corporations	163	Professional Services	262
Associations	214	Think Tank/Non-Profi	195

n = 834 POLITICO Pro clients

Source: Pro Benchmark Survey, May 2019

These external experts are a welcome addition to many firms' internal lobbying and policy analysis teams, but coordinating with them can itself be time-consuming. In our research, we heard from leading government affairs teams who were building new, scalable systems for rapidly responding to internal stakeholders' most common concerns. This meant creating reusable or regularly-updated explainers, graphics and memos on topics of broad interest to the firm (e g., trade or the affordable care act).

MEASURING THE VALUE OF GOVERNMENT AFFAIRS IN AN ERA OF HEIGHTENED INTEREST IN POLITICS AND POLICY

Despite heightened interest in politics and policy, many policy professionals report they continue to have trouble measuring the return-on-investment (ROI) for their work *(Figure 11)*. Paradoxically, all the time policy professionals spend delivering value to their organizations by advising internal partners on policy issues may detract from the time they have to engage in activities traditionally used to value their work, like booking meetings on the Hill. Even those organizations with the resources to cover internal and external demands on their time reported that showing value remains elusive in an era of legislative gridlock and political partisanship *(Figure 12)*.

FIG. 11
POLICY PROFESSIONALS CONTINUE TO HAVE DIFFICULTY DEMONSTRATING THE ROI OF THEIR WORK
% of policy professionals who say each management challenge is among their top three this year

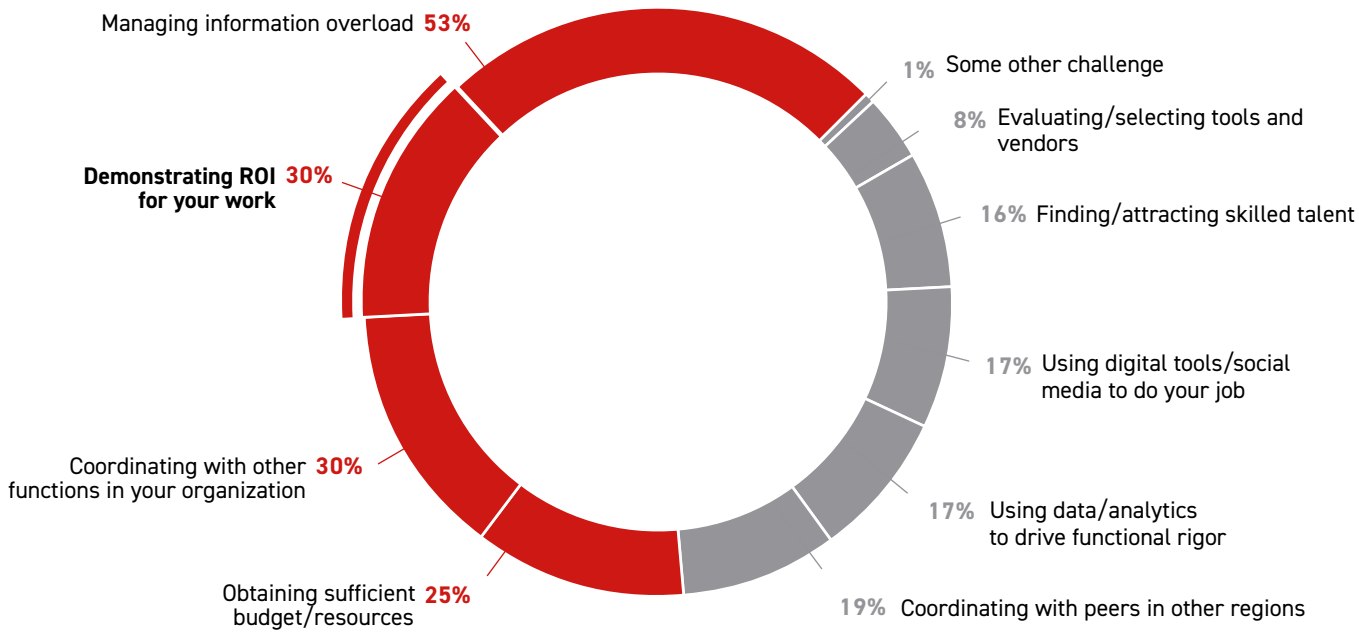
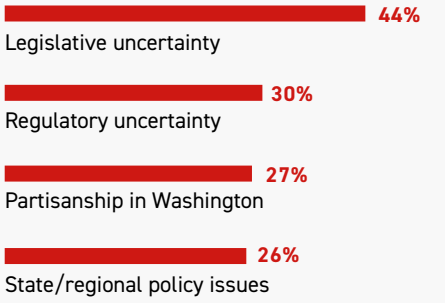


FIG. 12
PARTISANSHIP IN WASHINGTON CONTINUES TO FRUSTRATE POLICY PROFESSIONALS' WORK
% of policy professionals who say each policy challenge is among their top three this year

SUBSTANTIVE CHALLENGES ARE CONSISTENT ACROSS SEGMENTS
Issue Ranking by Territory

KEY # RESPONSES	N	LEGISLATIVE UNCERTAINTY	REGULATORY UNCERTAINTY	PARTISANSHIP IN D.C.	STATE/LOCAL ISSUES
Corporations	145	1	2	4	3
Associations	190	1	2	3	5
Professional Services	220	1	2	4	5
Think Tank/Non-Profi	170	1	4	3	2

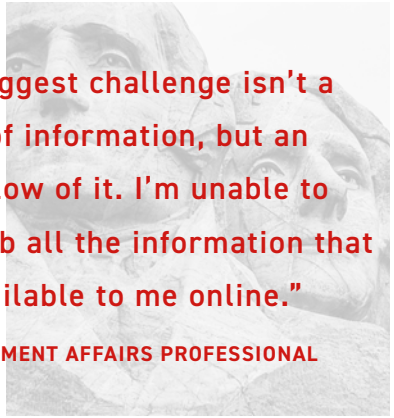


In our research, we found leading policy professional teams were eschewing metrics for valuing their work that focus on the means rather than the end (for example, tracking meetings, or lacked the precision to be credible with a senior executive audience (e.g., attributing meetings to legislative outcomes. Instead, these teams work with their Chief Financial Officers (CFOs and business stakeholders to create repeatable, reliable metrics for measuring policy issues' impact on their companies' and clients' performance. They also press business leaders in their firms to attribute financial impact to issues they'd like the government affairs team to prioritize; thereby allowing government affairs teams to make informed choices about resource allocation and empowering them to measure results in dollars and cents. Finally, many teams are looking to external benchmarking partners to provide an unbiased view into their firms' reputation in Washington on a year-to-year basis.

02 POLICY PROFESSIONALS' STRUGGLE TO MANAGE INFORMATION OVERLOAD

POLICY PROFESSIONALS' STRUGGLE TO MANAGE INFORMATION OVERLOAD

Heightened corporate interest in politics and policy means policy professionals need to keep pace with more issues than ever before, and the pace of the news cycle, rise of social media, and dispersion of information sources are making that job especially hard. More than half of policy professionals say information overload is among their top three challenges this year, and many say it is almost impossible to find time to process and synthesize information coming from numerous disparate sources (*Figure 13*).

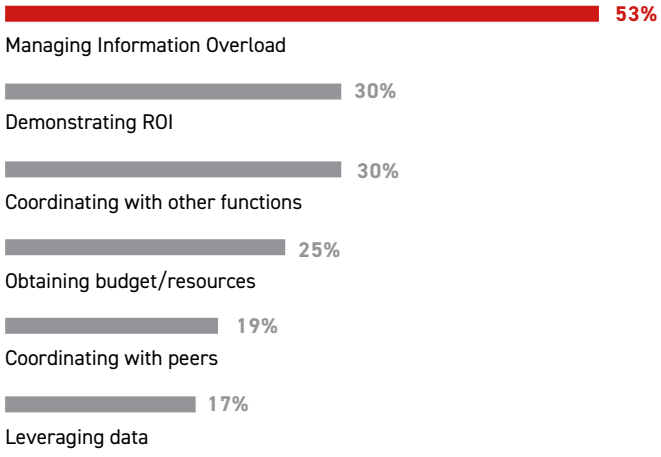


"My biggest challenge isn't a lack of information, but an overflow of it. I'm unable to absorb all the information that is available to me online."

GOVERNMENT AFFAIRS PROFESSIONAL

FIG. 13
POLICY PROFESSIONALS ARE SUFFERING FROM INFORMATION OVERLOAD

"MANAGING INFORMATION OVERLOAD" IS POLICY PROFESSIONALS' #1 CHALLENGE
% of policy professionals who rate each functional challenge among their top 3 this year, top 6 responses only

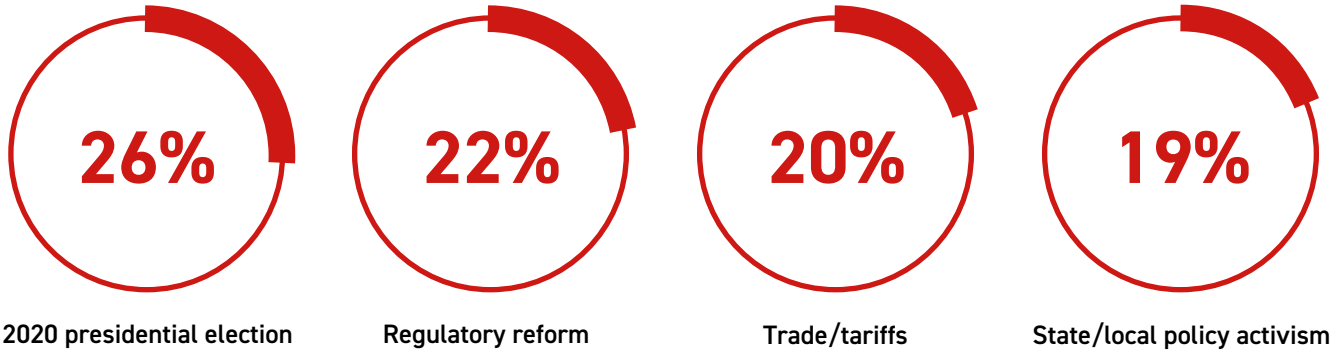


n= 910 POLITICO Pro clients across segments
Source: Pro Benchmark Survey, May 2019

"SEARCHING FOR INFORMATION" IS POLICY PROFESSIONALS' TOP CATEGORY OF TIME SPEND
% of policy professionals who say each activity is among their top 3 areas of time spend

n= 890 government affairs executives
Source: Pro Benchmark Survey, May 2019

FIG. 14
POLICY PROFESSIONALS ARE CLOSELY TRACKING STATE AND LOCAL POLICY ACTIVISM
% of policy professionals who rate each policy issue among their top 3 tracked this year, top 4 only



Fueling the fire of information overload for policy professionals is the dispersion of policymaking. Amid partisanship at the national level, issues which would have at one time been decided by Congress are now fragmented among the local, state, and international legislatures. Data privacy is a prime example of the many fronts that policy pros need to monitor for change: The European Union (EU) has become an international standard-setter, California is taking a disruptive stance and local governments are attempting to effect changes of their own. With policy arising from so many locales, it's impossible for policy professionals to stay ahead of every twist and turn, and many say surprise has become standard.

FIG. 15
POLICY PROFESSIONALS RELY ON POLICY INTELLIGENCE TOOLS
% of policy professionals who say they use policy intelligence tools for each reason

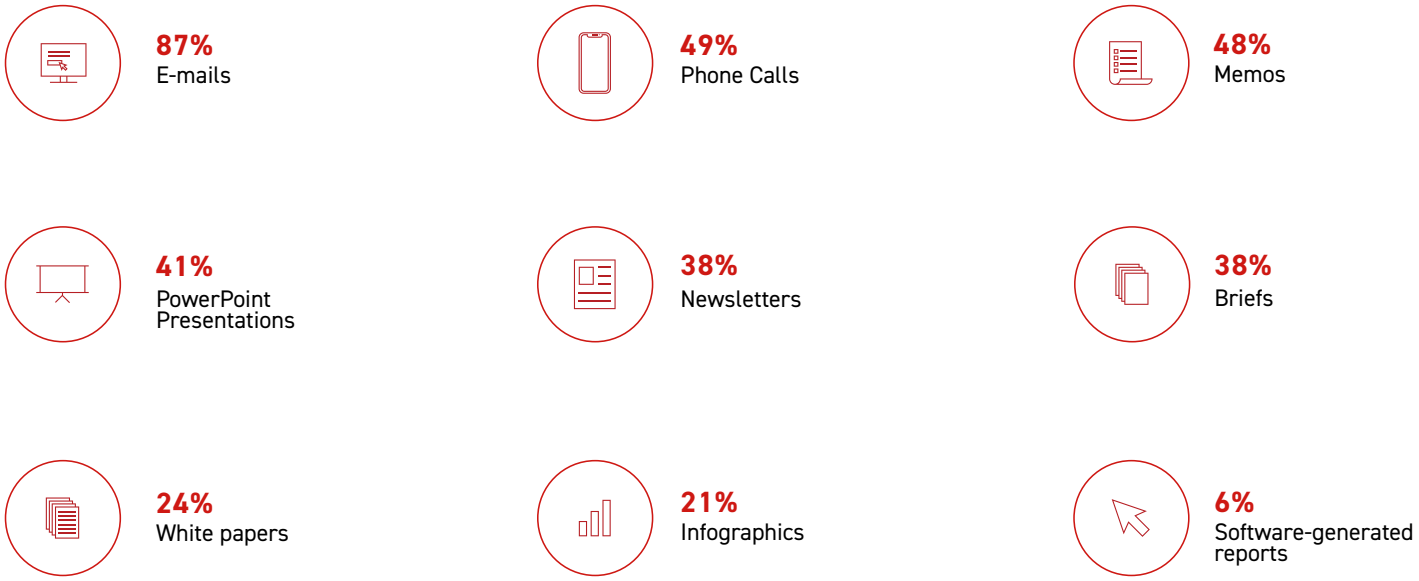
"Things are changing so quickly, and they play out across so many different jurisdictions. It's almost impossible to keep up with it all."

SVP GOVERNMENT RELATIONS, HEALTHCARE COMPANY, CLIENT ADVISORY BOARD MEMBER

With these growing demands on their attention and time, many policy professionals are turning to policy intelligence tools—like legislative and regulatory tracking and directories of government stakeholders—to work more efficiently (*Figure 15*). Most policy professionals say these tools are useful for helping them find and organize all policy information relevant to a policy issue in a single place. While many policy intelligence tools are becoming increasingly sophisticated, with features for building reports and creating visualizations, these features have not yet gained widespread adoption. Phone calls, emails, and memos remain the standard means of communication for most policy experts on the move (*Figure 16*).

Since this overload of ever-changing information shows no signs of slowing, some policy leaders are experimenting with their team structures and information management systems in an effort to keep up. For example, some leaders have restructured their teams to focus on issues rather than geographic jurisdictions, allowing their team members to become subject matter experts on a smaller set of key policy areas. Others in corporate settings have established clearly-defined decision trees to triage the policy issues that need response, helping narrow their focus to the areas that are most important to their firms' bottom lines.

FIG. 16
POLICY PROFESSIONALS RELY PRIMARILY ON E-MAIL TO SHARE POLICY UPDATES
% of policy professionals who use each method to deliver policy updates to partners and clients



03 THE RISE OF DIGITAL MEDIA AS A LEVER OF INFLUENCE

CHANGING TIMES (AND SKILL SETS) FOR POLICY PROFESSIONALS

Over the past five years, a confluence of interrelated trends have amplified digital media's importance as a tool for influencing policy outcomes. Social media's role in political communication, which has been growing steadily for over a decade, reached outsized proportions during and after the 2016 U.S. presidential campaign. During that time, the rise of grassroots movements and growth of public engagement on policy issues pushed politicians to give greater weight to their digital messaging and presence online. Companies, by then accustomed to monitoring and protecting their brands on digital platforms, found they were subject to the new risks from the public, politicians and investors calling them out on policy issues online.

Policy professionals have watched these trends closely. While communication and relationship management have always been—and remain—the policy influencers' most important assets (*Figure 17*), those in the field see changes on the horizon. Nearly a quarter of policy professionals believe digital media/storytelling and data analysis will be among the top three skills important to their professional success by 2022. Similarly, many policy professionals predict large upticks in the amount of time they dedicate to monitoring social media and analyzing quantitative data (*Figure 18*).

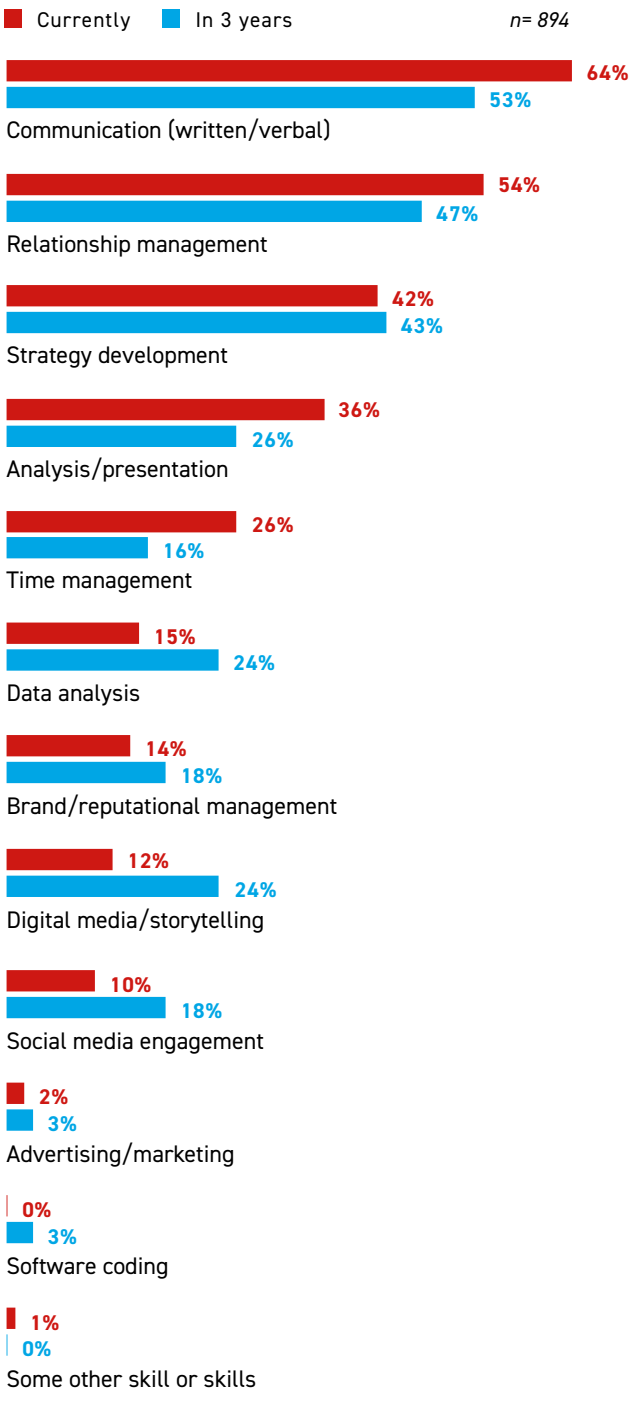
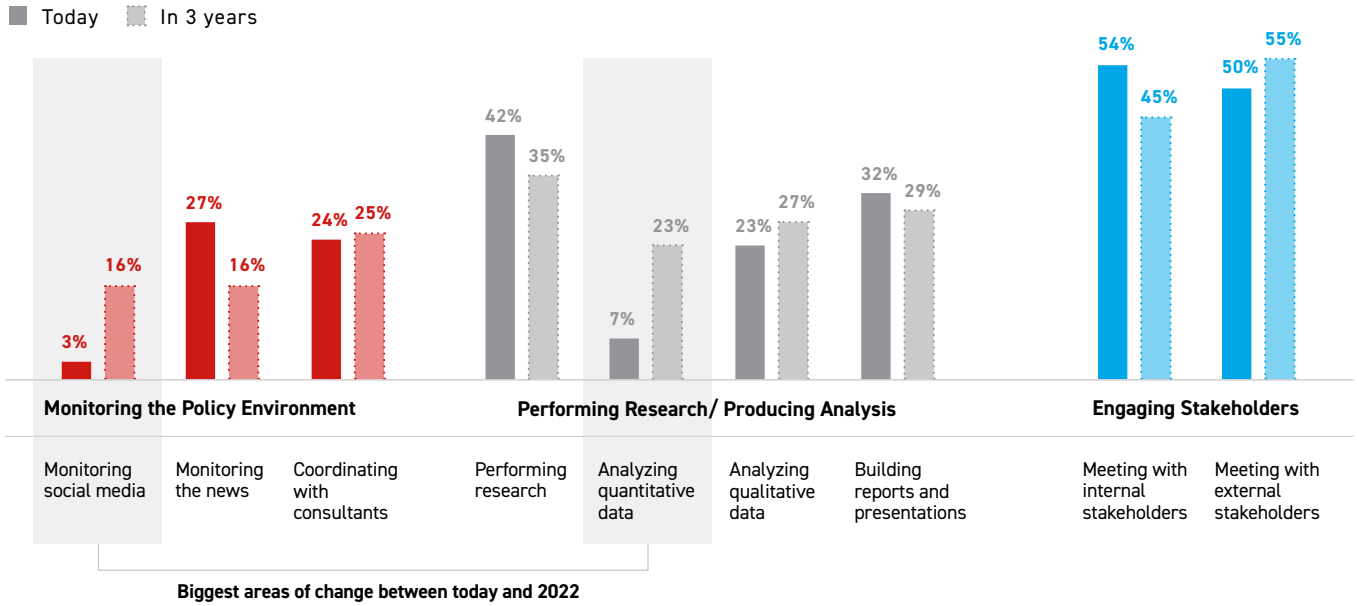


FIG. 17
POLICY PROFESSIONALS FORESEE A RISE IN THE IMPORTANCE OF DIGITAL MEDIA AND DATA ANALYSIS SKILLS
% of policy professionals who rate each skill as among the top 3 most important to their role now compared to in 3 years time

> "I am already seeing the value of bringing new members onto my team who lack the traditional government affairs pedigree. When paired together, our government affairs experts and individuals with background in media, digital communication, and technology make a formidable team."
>
> **HEAD OF FEDERAL AFFAIRS, CORPORATION**

Data's role in driving influence was a particular point of interest am ng the policy professionals we engaged in our research. An abundance of policy-related data has become available in recent years, ranging from details of legislators' histories and relationships to consumer opinion on public policy and trends in lobbying spending. Many of the government affairs leaders we spoke to indicated a desire to use these and other data to set strategy and direct resources more effectively. To date, however, the use of metrics and data remains in its infancy within the profession. Just like other disciplines suddenly awash in analytics, policy professionals often lack the time and resources to invest in quantitative analysis and are still working to see which data sources and tools will truly deliver value.

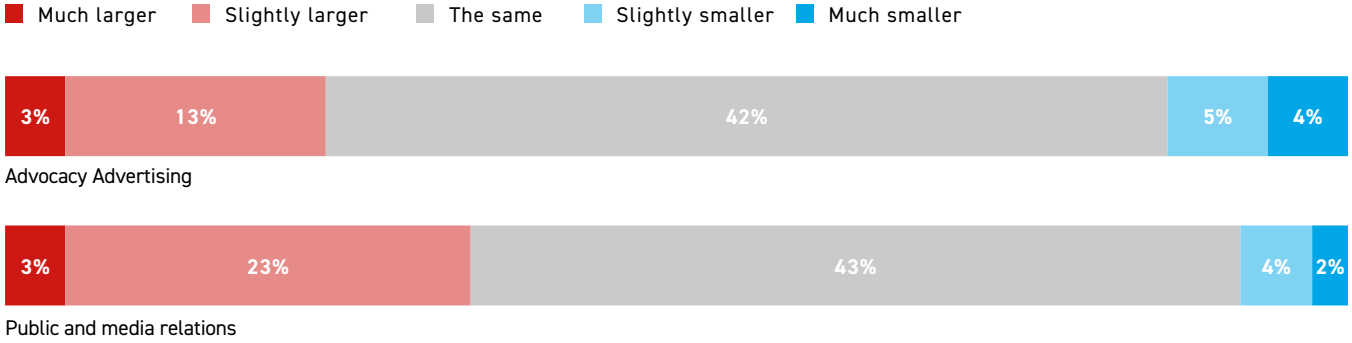
FIG. 18
POLICY PROFESSIONALS EXPECT TO SPEND MORE TIME ON DATA AND DIGITAL ACTIVITIES
% of policy professionals who say each activity is one of the top three they spend most time on today and expect to spend most time on in three years



n= 119 government affairs executives

Source(s): POLITICO Analysis, POLITCO 2019 Pro Benchmark Survey

FIG. 19
MORE THAN A QUARTER OF POLICY PROFESSIONALS EXPECT TO SPEND MORE ON PUBLIC AND MEDIA RELATIONS NEXT YEAR
% of policy professionals who say each activity will grow/shrink/stay the same as a share of their overall budget



THE GROWING IMPORTANCE OF POLICY ADVERTISING

One place where the impact of policy data, social media and digital storytelling is already readily apparent is in policy professionals' investment in issue advertising. With more politicians on social media and greater volatility in the policy environment, policy professionals are turning to advertising as an innovative means to capture policymaker attention and shape public opinion. Digital issue ad spending is expected to skyrocket from less than $1.5B spent during the 2016 election to more than $2.85B in 2020, and more than one-quarter of policy professionals are expecting to spend more on public and media relations in the next year (*Figure 19*).[1]

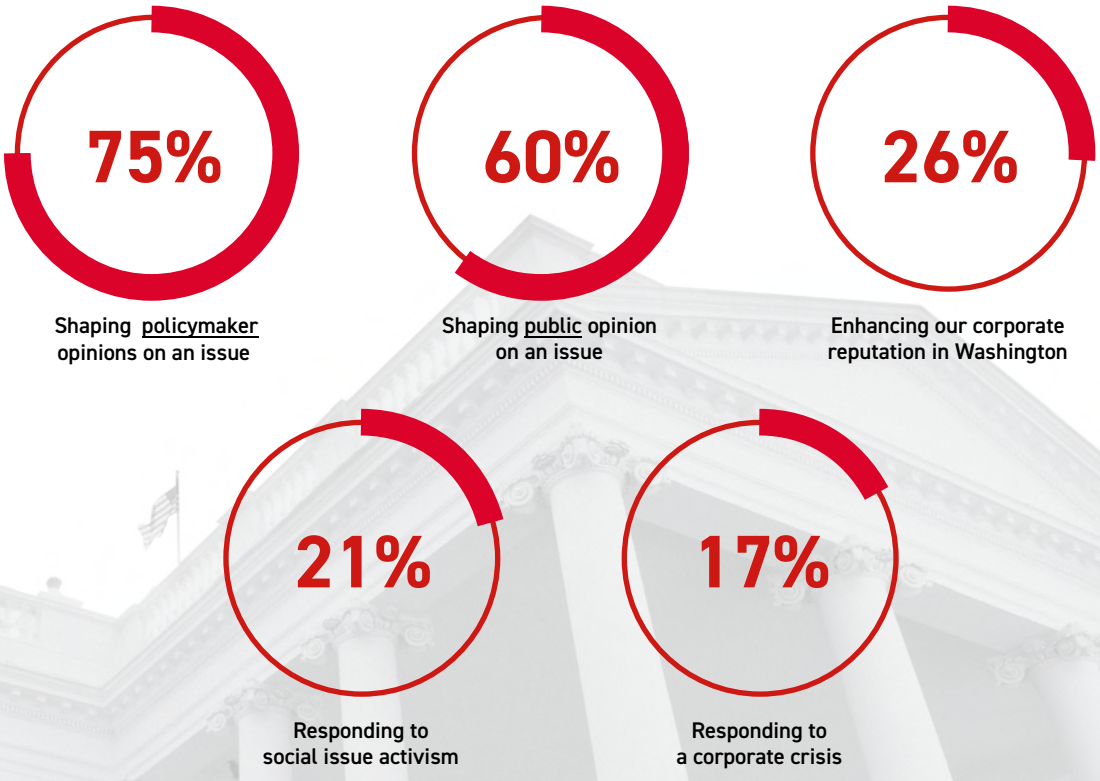
Despite the rise of grassroots movements and increasing outspokenness of the public on policy issues, shaping policymaker opinion remains the top reason for organizations to invest in issue advocacy given their unique and outsized role in shaping policy outcomes (*Figure 20*).

> "More data tools are becoming available to my team each year, but I've adopted a wait and see approach. We are a small operation and I'm not sure we have the bandwidth to make use of all the functionality some of these data-driven products offer."
>
> **VP GOVERNMENT RELATIONS, CORPORATION**

[1] Borrell Associates 2018 Local Political Advertising Outlook report; OpenSecrets.org; Morning Consult

The leading policy professionals we spoke with were partnering with advertising and media consultants to measure the precise impact of their issues ads on policymaker opinions of their brands. This detailed brand and reputation tracking provides policy professionals a clear, articulable metric for conveying how their organizations' investments in government affairs translate into outcomes in Washington. Using this data can in turn empower organizations to ask for more budget to invest in advertising and communications in D.C.

FIG. 20
THE PRIMARY REASON TO INVEST IN ADVOCACY ADVERTISING IS TO SHAPE POLICYMAKER OPINIONS ON ISSUES
% of policy professionals who use advocacy advertising for each reason



n = 447 POLITICO Pro clients across segments
Source: Pro Benchmark Survey, May 2019

04 FUNCTIONAL AND SPENDING BENCHMARKS

CORPORATIONS — ASSOCIATIONS — PROFESSIONAL SERVICES FIRMS — NON-PROFITS

CORPORATIONS

In May of 2019 POLITICO Pro surveyed 1,400+ policy professionals, 16% of whom identified themselves as policy professionals at corporations. Here's what they had to say about the state of being a policy professional in 2019.

TEAM SIZE

6 MEDIAN (FULL-TIME EMPLOYEES)

- ▲ **49%** Say their team size is growing
- ▼ **10%** Say it is shrinking

TEAM REPORTING

To whom does your team report?

- **32%** CEO/Chairman/President
- **24%** General Counsel/Chief Legal Officer
- **18%** Business unit or division VP/SVP/EVP

TEAM RESPONSIBILITIES

Primary responsibilities

70%
DIRECT LOBBYING

- **69%** Government relations (federal/national)
- **60%** Government relations (state/provincial)
- **55%** Political action committees (PACs)/political contributions
- **49%** Regulatory affairs
- **49%** Corporate communication (external)
- **48%** Public/media relations
- **48%** Regulatory compliance
- **45%** Charitable contributions/philanthropic activities/foundations

BUDGET

Median Team Budget

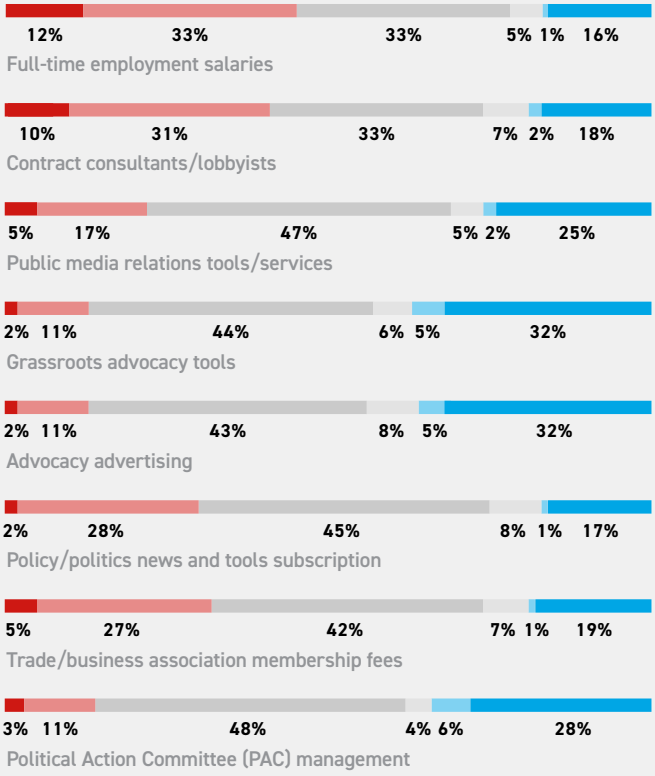
$500,000 — $750,000 — $1,000,000 — **$1,250,000** — $1,500,000

Top Ranked Budget Line Items Other than full-time employee salaries

- **50%** Contract consultants/lobbyists
- **38%** Trade/business association membership fees
- **25%** Policy/politics news and tools subscriptions

BUDGET SHIFTS

Shifts in organizational spend over the past two years



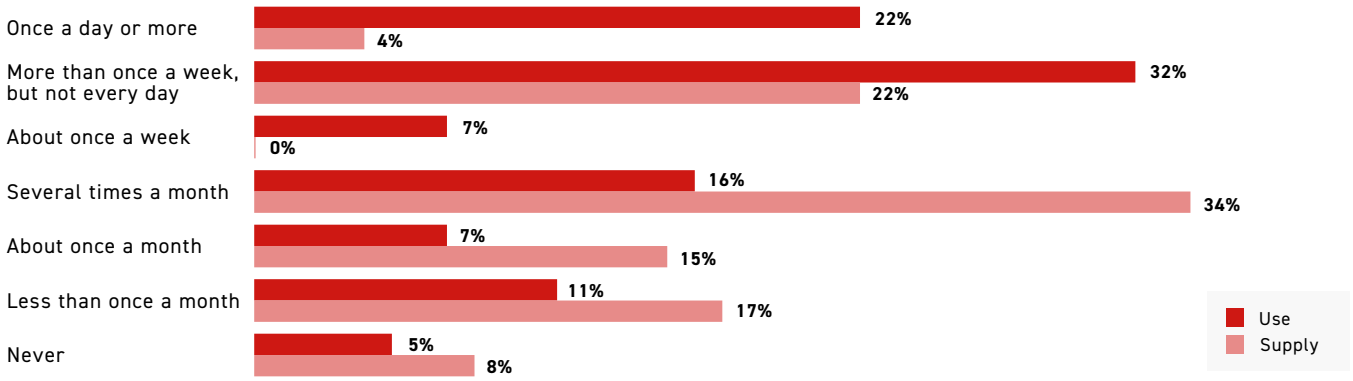
- Much larger share of budget
- Slightly larger share of budget
- About the same
- Slightly smaller share of budget
- Much smaller share of budget
- Don't know

Base: Not working in government organizations or sole proprietorship (AA1=1-7)

n= 238

EXTERNAL ANALYSIS

How often do you use or supply external analysis



Base: Not working in government organizations or sole proprietorship (AA1=1-7)
n= 159

COMMUNICATION

Most common methods of communication

88% EMAIL

54% PowerPoint presentations
53% Memos

ADVOCACY ADVERTISING

Frequency and purpose of ads

2.9 TIMES A YEAR ON AVERAGE

72% Shaping policymaker opinions
61% Shaping public opinion

CONSULTANTS

Use cases for contract consultants

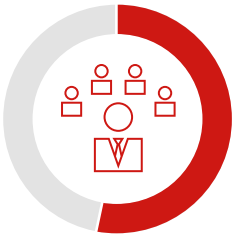
69% DIRECT LOBBYING (FEDERAL)

59% Direct lobbying (state/provincial)
51% Policy analysis

POLICY UPDATES

Teams

To which teams do you provide updates at least once a week?

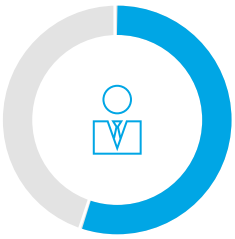


53% COMMUNICATIONS

47% Regulatory affairs and corporate strategy
44% Legal

Individuals

To whom do you provide updates at least once a week?



55% CEO

49% General counsel
46% Business unit leaders/heads

ASSOCIATIONS

In May of 2019 POLITICO Pro surveyed 1,400+ policy professionals, 18% of whom identified themselves as policy professionals at associations. Here's what they had to say about the state of being a policy professional in 2019.

TEAM SIZE

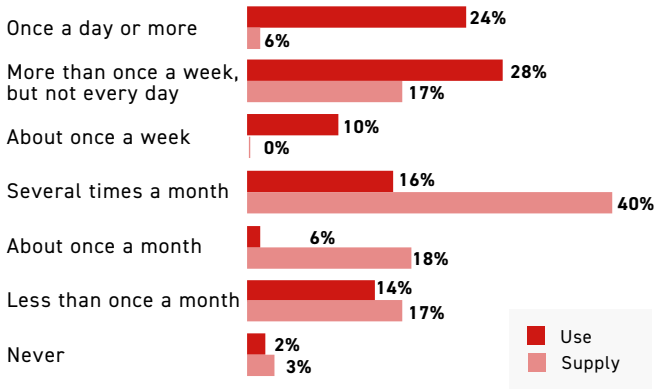
7 MEDIAN (FULL-TIME EMPLOYEES)

▲ **46%** Say their team size is growing

▼ **9%** Say it is shrinking

EXTERNAL ANALYSIS

How often do you use or supply external analysis



Base: Not working in government organizations or sole proprietorship (AA1=1-7)
n= 207

ADVOCACY ADVERTISING

Frequency and purpose of ads

3.9 TIMES A YEAR ON AVERAGE

88% Shaping policymaker opinions

61% Shaping public opinion

CONSULTANTS

Use cases for contract consultants

57% DIRECT LOBBYING (FEDERAL)

47% Policy analysis

38% Regulatory affairs/analysis

BUDGET

Median Team Budget

$500,000 | $750,000 | **$1,000,000** | $1,250,000 | $1,500,000

Top Ranked Budget Line Items Other than full-time employee salaries

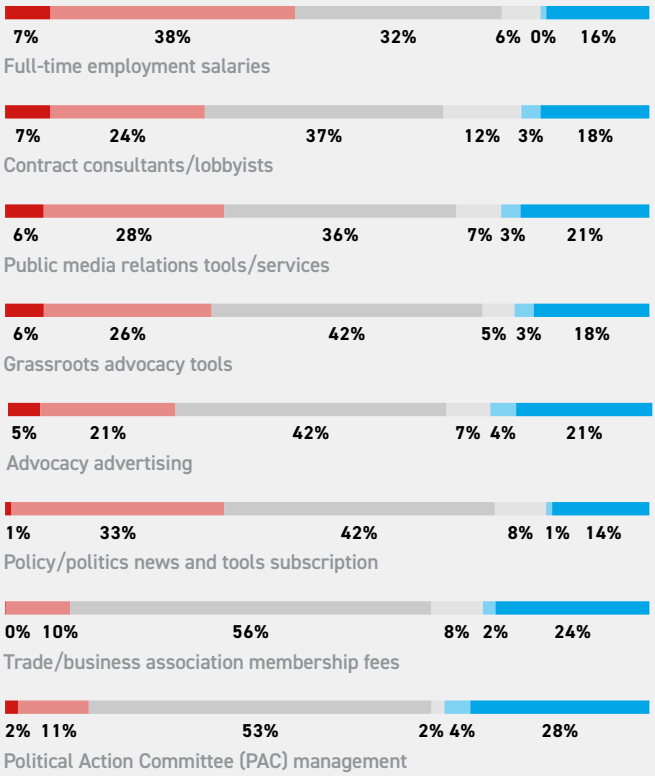
39% Contract consultants/lobbyists

30% Policy/politics news and tools subscriptions

23% Grassroots advocacy tools

BUDGET SHIFTS

Shifts in organizational spend over the past two years



Base: Not working in government organizations or sole proprietorship (AA1=1-7)

n= 238

NON PROFITS/THINK TANKS

In May of 2019 POLITICO Pro surveyed 1,400+ policy professionals, 20% of whom identified themselves as policy professionals at non-profits or think tanks. Her 's what they had to say about the state of being a policy professional in 2019.

TEAM SIZE

8 MEDIAN (FULL-TIME EMPLOYEES)

- ▲ **45%** Say their team size is growing
- ▼ **10%** Say it is shrinking

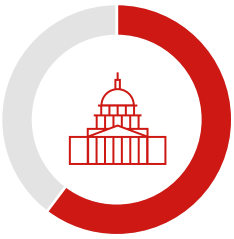
TEAM REPORTING

To whom does your team report?

- **53%** CEO/Chairman/President
- **14%** Other
- **12%** Business unit or division VP/SVP/EVP

TEAM RESPONSIBILITIES

Primary responsibilities



60%
GOVERNMENT RELATIONS (FEDERAL/NATIONAL)

- **45%** Direct lobbying
- **39%** Government relations (state/provincial)
- **58%** Public/media relations
- **45%** Grassroots advocacy
- **44%** Corporate communications: external

BUDGET

Median Team Budget

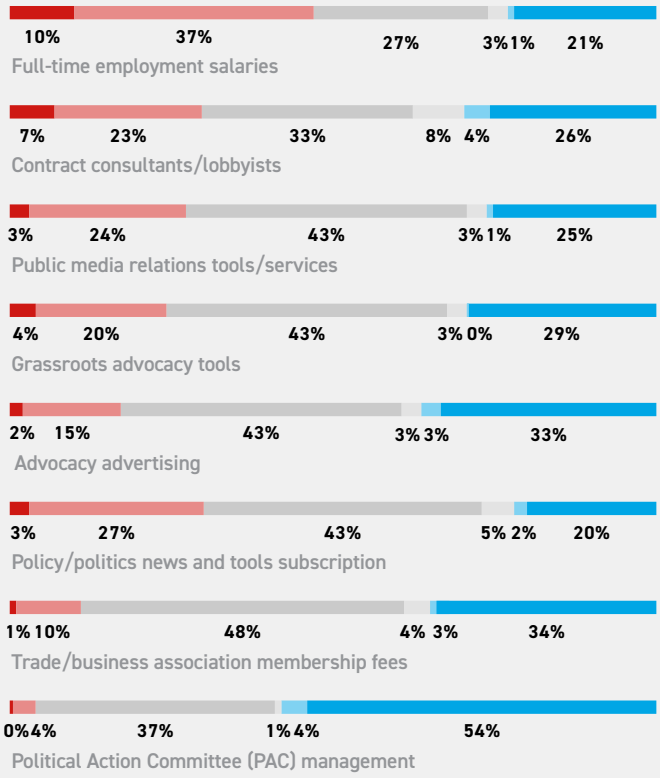
$500,000 | $750,000 | $1,000,000 | $1,250,000 | **$1,500,000**

Top Ranked Budget Line Items Other than full-time employee salaries

- **31%** Policy/politics news and tools subscriptions
- **25%** Contract consultants/lobbyists
- **22%** Grassroots advocacy tools

BUDGET SHIFTS

Shifts in organizational spend over the past two years



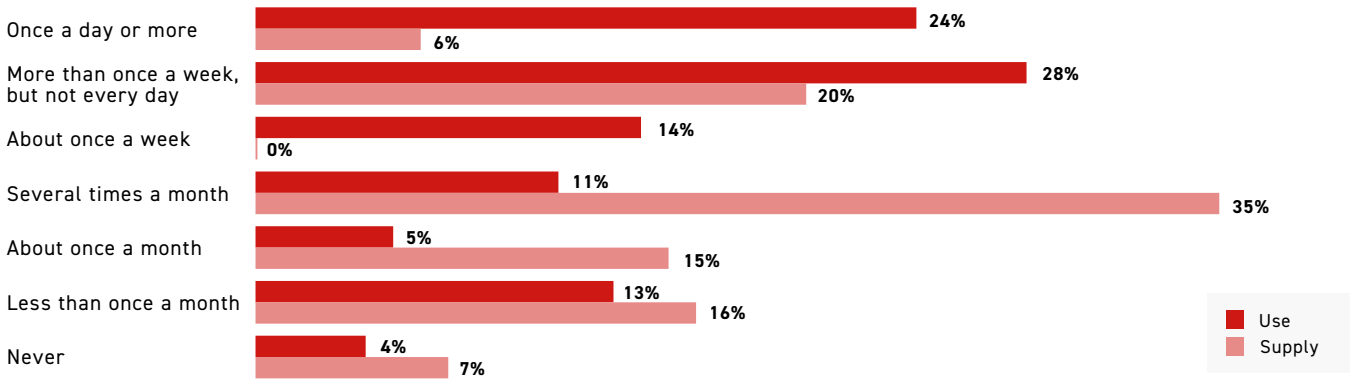
- Much larger share of budget
- Slightly larger share of budget
- About the same
- Slightly smaller share of budget
- Much smaller share of budget
- Don't know

Base: Not working in government organizations or sole proprietorship (AA1=1-7)

n= 230

EXTERNAL ANALYSIS

How often do you use or supply external analysis



Base: Not working in government organizations or sole proprietorship (AA1=1-7)
n= 188

ADVOCACY ADVERTISING

Frequency and purpose of ads

3.6 TIMES A YEAR ON AVERAGE

73% Shaping policymaker opinions

66% Shaping public opinion

CONSULTANTS

Contract consultant use cases

43% POLICY ANALYSIS

42% Direct lobbying (federal)

34% Strategic planning and advisory services

PROFESSIONAL SERVICES

In May of 2019 POLITICO Pro surveyed 1,400+ policy professionals, 27% of whom identified themselves as policy professionals at professional services organizations. Here's what they had to say about the state of being a policy professional in 2019.

TEAM SIZE

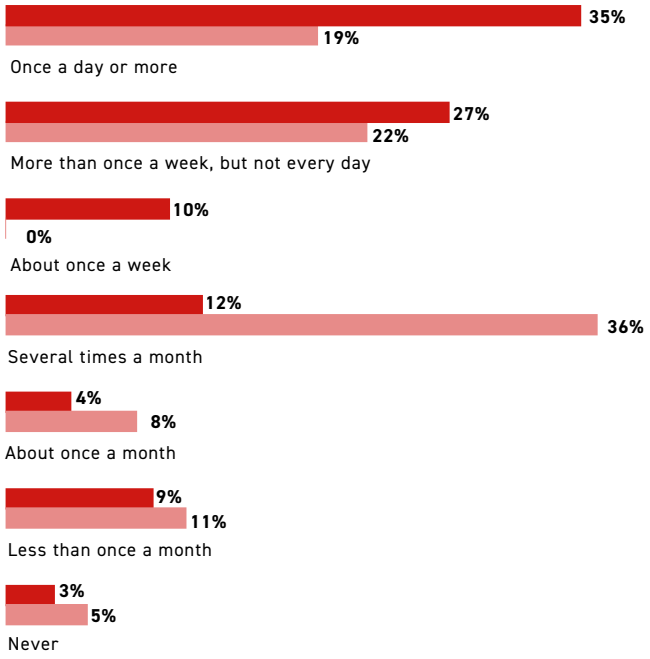
12 MEDIAN (FULL-TIME EMPLOYEES)

▲ **52%** Say their team size is growing

▼ **7%** Say it is shrinking

EXTERNAL ANALYSIS

How often do you use or supply external analysis



Use
Supply

Base: Not working in government organizations or sole proprietorship (AA1=1-7)

n= 159

BUDGET

Median Team Budget

$500,000 $750,000 **$1,000,000** $1,250,000 $1,500,000

Top Ranked Budget Line Items Other than full-time employee salaries

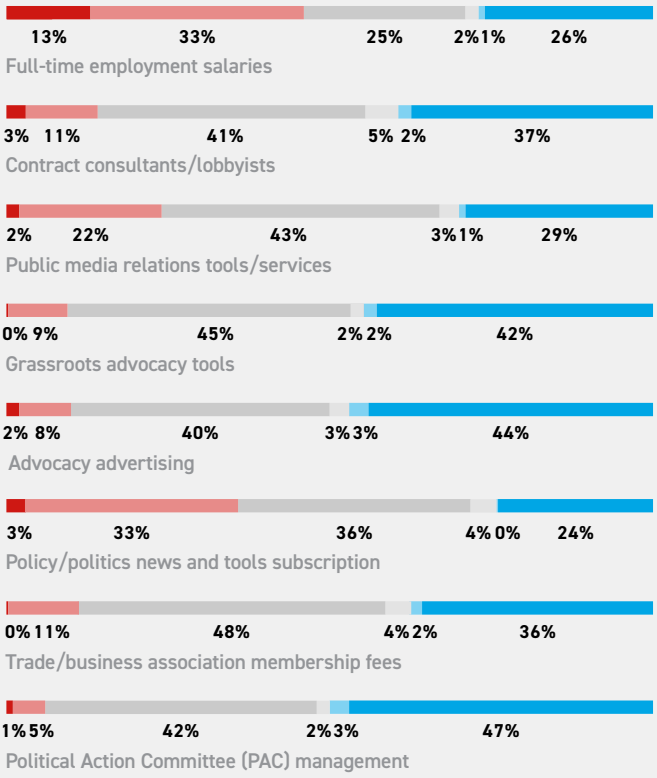
33% Policy/politics news and tools subscriptions

19% Public and media relations tools/services

16% Contract consultants/lobbyists

BUDGET SHIFTS

Shifts in organizational spend over the past two years



Much larger share of budget
Slightly larger share of budget
About the same
Slightly smaller share of budget
Much smaller share of budget
Don't know

Base: Not working in government organizations or sole proprietorship (AA1=1-7)

n= 323