

Research Report: How COVID-19 has impacted the EU public affairs sector and practice

Context

In March 2020, the restrictions put in place to tackle the COVID-19 pandemic led to a shift in how public affairs activities in Brussels were conducted. Meeting went from being in-person to online, events took place online rather than in venues, professionals worked at a distance from their colleagues and clients, and all interactions shifted to the online world. EPACA, as the representative body of public affairs consultancies in Brussels, launched a survey within its membership in Q4 of 2020 and Q1 of 2021, in order to gain an sector-wide view of what the ongoing effects of the COVID-19 pandemic might be on the public affairs industry, professionals, and practice.

Objective

To gain more insight into how the COVID-19 pandemic is impacting the EU public affairs sector and the overall practice of public affairs. The survey questions focused on four sub-themes:

1. the impact on the engagement with political stakeholders;
2. the impact on the organization and attendance of events;
3. the economic impact;
4. the impact on the relationship with - and between - employees

Methodology

The survey questions were developed by the EPACA Secretariat and reviewed by the Management Committee. Five random individuals participated to a pilot survey in order to identify potentially ambiguous questions/answer categories and detect technical issues. The final survey was composed of 29 questions and included a mix of open-ended and closed questions in a variety of formats.

The survey was shared with [EPACA members](#), 40 EU public affairs consultancies with offices in Brussels. Fifteen members responded to the survey, accounting for 37.5% of EPACA's membership. On average, the time to complete the survey was 11 minutes. Answers to the questions remained anonymous. The results shown below are based on a descriptive analysis of the aggregated data, supplemented with qualitative responses to open-ended questions by (anonymous) individual respondents.

Research Results

STAKEHOLDERS AND ENGAGEMENT

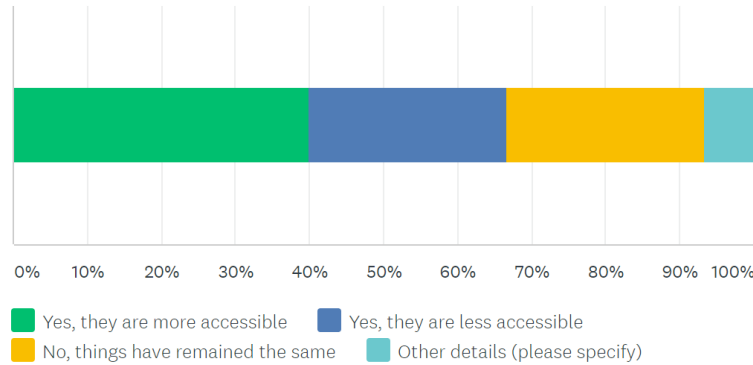
The results concerning the impact on the accessibility of EU politicians and policymakers paints a mixed picture. Four out of ten respondents have experienced that they are less accessible. A quarter of respondents (26.67%) feel that they are either less accessible (26.67%), while another quarter thinks that things have remained the same (26.67%).

Qualitative data suggests that the mixed bag of results could be explained by a non-linear effect: policy-makers who are generally less open to interactions with private stakeholders are in the current context even more difficult to engage with (no office / official telephone number), while those that were

generally open to engaging with private stakeholders are easier to connect with via online tools. This possible effect was corroborated by the members of the Management Committee.

In general, have you noticed a change in how accessible politicians and policy-makers are, following the transition to remote working?

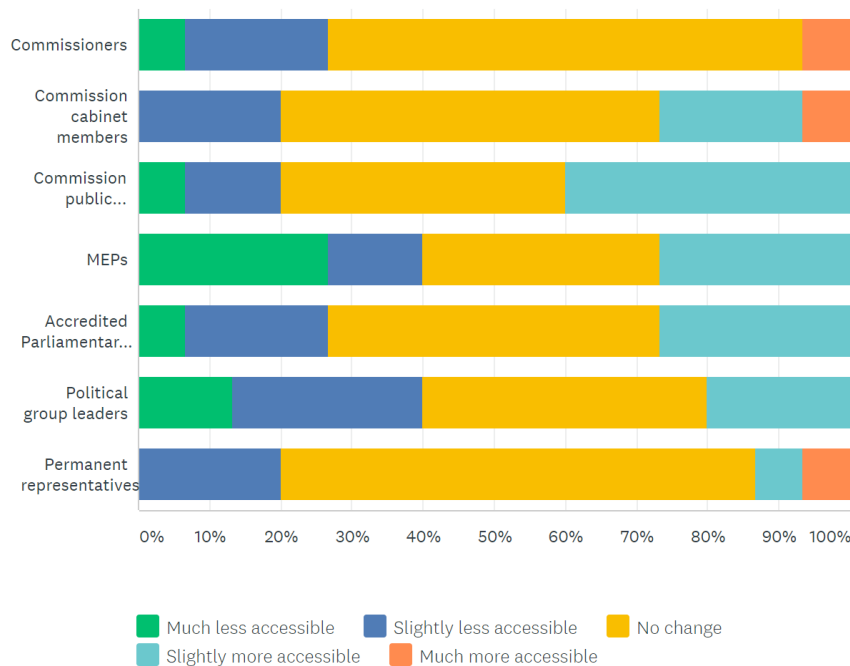
Answered: 15 Skipped: 0



Comparing across the different types of policymakers, **the accessibility of MEPs has been most negatively impacted by the shift to online meetings**. 40% of respondents indicated that MEPs are either slightly or much less accessible following the transition to remote working, which is the highest among all types of policymakers. This could be due to the fact that many MEPs decided to move back to their countries as a result of the remote working.

Please rate how accessible the following stakeholders have been since the transition to remote working:

Answered: 15 Skipped: 0



According to public affairs consultants, networking, intelligence gathering and non-verbal communication are the aspects of their work which have been most strongly impacted by the lack of physical meetings and events. However, the move to remote meetings has not impacted the sector in a way that that would prevent them from doing their jobs. In order to ensure continued dialogue (and business continuity) **public officials could be encouraged to exchange regularly with external stakeholders via virtual meetings.**

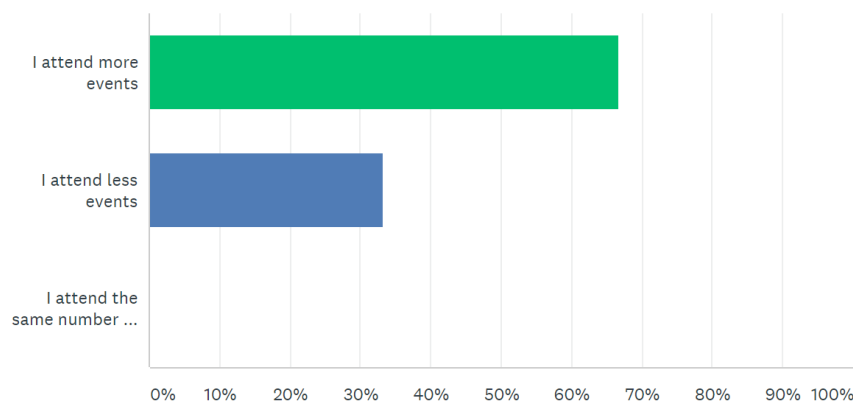
The EPACA Code of Conduct is sufficiently clear when applied to virtual interactions rather than in-person interactions. In order to enhance transparency, clearer guidelines from the institutions on what constitutes “a meeting” would be helpful

EVENTS

Whilst there is more attendance of events due to the virtual format being easier on the travel and time commitments, there is a **slight increase in 'virtual events fatigue'**, with people getting tired of the format. The main draw for attending in-person events was **the chance to network and have informal conversations with other attendees, and this has not been adequately replaced in virtual events.**

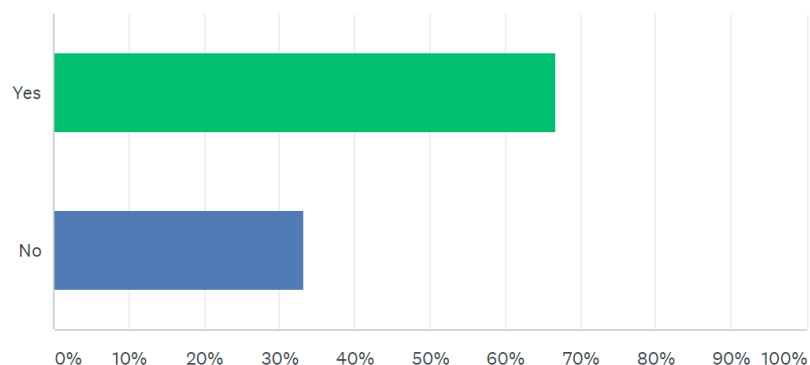
Has the switch to virtual events impacted how many events you attend?

Answered: 15 Skipped: 0



Have you noticed any 'virtual events fatigue' in the EU public affairs community?

Answered: 15 Skipped: 0



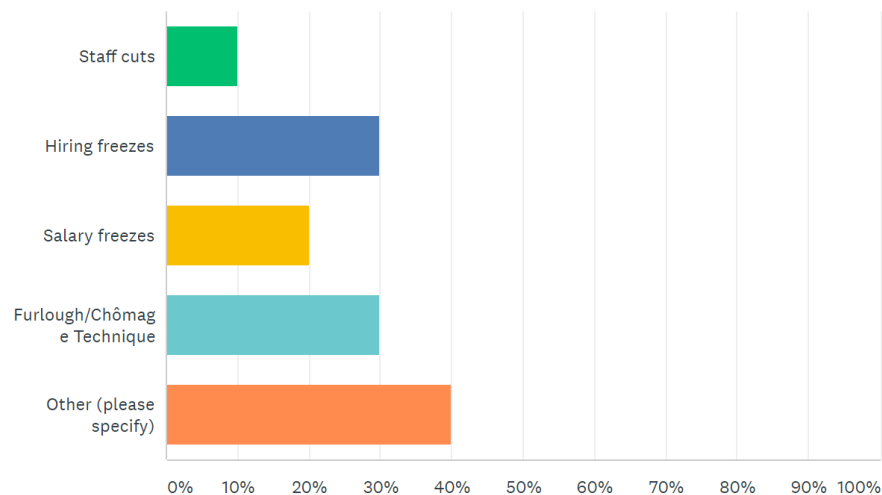
ECONOMIC IMPACT

The impact of the pandemic on revenue, staff size, and size of client portfolios again paints a mixed picture: some companies have grown while other companies have been more negatively impacted. The mixed responses seem to suggest a **“double-edge sword” effect**: on the hand member consultancies have lost clients which were heavily impacted by the economic consequences of COVID-19 (aviation, tourism). On the other hand, the crisis has increased the need for dialogue between policymakers and businesses. This possible effect was corroborated by the Management Committee.

While the past year has been difficult for many public affairs consultancies - as reflected by the incidence of staff cuts, hiring freezes, salary freezes, and use of furlough schemes – all respondents are **optimistic about the economic future of EU public affairs**.

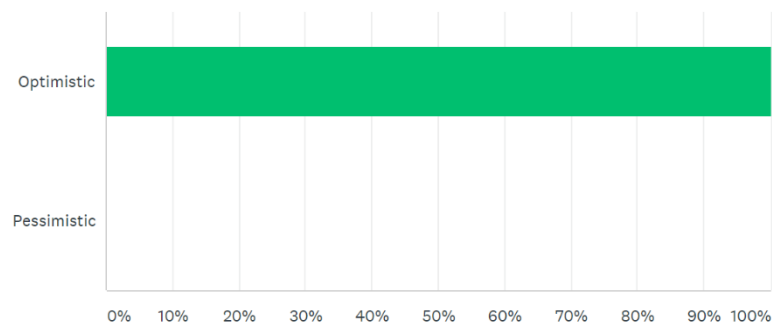
Which of the below, if any, has your company experienced in the past 9 months (check all applicable):

Answered: 10 Skipped: 5



Are you optimistic or pessimistic about the economic future of the EU public affairs industry?

Answered: 15 Skipped: 0

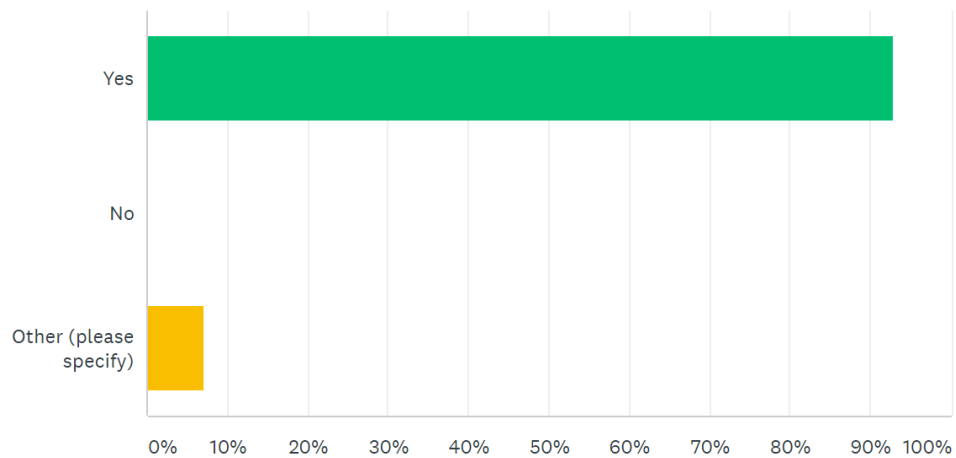


EMPLOYEES

The survey suggests that the sector feels that being in the office setting is beneficial for the practice, but that individual preference for being in the office is dependent on personal circumstances. Most companies offered WFH abroad where possible, which employees made use of. **This could indicate that a flexible, hybrid approach will become the norm when restrictions are loosened.**

Has your company allowed work from home abroad?

Answered: 14 Skipped: 1



The survey shows that during the lockdown, **motivation went down, productivity went up, stress levels increased, as did team spirit.** The decrease in motivation and increase in stress can likely be attributed to ongoing isolation, and the lack of usual stress relief and interactions. The higher productivity could reflect the increased time and decreased distractions of the office setting. The increased sense of Team Spirit, which could seem surprising due to teams being distributed, may be due to an intensified focus by management on team building and integration

Have you noticed any psychological impacts of tele-working on you or your colleagues?

Answered: 14 Skipped: 1

