Chapter 9 - Effective online communication for policy advisors: experience from the Bruegel think tank

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INTRODUCTION

Digitization of content has now been present for decades. The gradual expansion of the possibilities for accessing content online, via several different formats and platforms, constitutes an important element for targeted and effective communication and research impact. It is also a matter of reach: according to a recent report by We Are Social (see Kemp, 2017) half of the world's population is connected to the web and the figure rises to 76 per cent for the European continent, with 37 per cent of the worldwide population connected at least to one social media, rising to 49 per cent in Europe.

This data should be coupled with the recent trend in communication of research products to move beyond dry facts to build narratives and stories. Online communication multiplies the possibilities to frame the results of research in ways that respond to specific audiences' appetites for accessible and engaging messages. The opportunity to build narratives in a digital environment opens the door for many more methods for effective research communication.

This chapter argues that, despite this background, online tools are not an automatic recipe for success. They should be put in the context of an overall communication strategy that has clearly identified goals, for both online and offline channels – such as print distribution, face-to-face events or traditional media outreach – taking into account their specificity and the interaction between online and offline.

Second, I will highlight the challenges and sketch the methodologies to map and segment audiences in general, as well as in the specific case of research institutions such as think tanks, where the map of influencers is very dynamic. Think tanks are organizations that perform research which is oriented towards advising policy change. And policies are not shaped solely by traditionally influential individuals, but also by certain sections of the wider public, who are more often and more effectively shifting the political discourse in alternative directions.

Third, I will discuss how to engineer tools to reach specific audiences and to shape messages effectively by using specific platforms. The case study of Bruegel, an international economics think tank based in Brussels, will be used throughout the chapter to support a wider reflection on the challenges, common to other research institutions as well, including universities.

As a relatively young institution, which began operations in 2005, Bruegel is an interesting case study regarding the evolution of the use of online tools within a decade. Since the beginning it had published its research online, but only a few years later the global financial crisis and the resulting rapidly changing environment led us to the development of a much more comprehensive bias towards online

distribution of research versus traditional printing and mailing, to cope with the need to respond quickly to the external environment with timely analysis and policy-oriented research. Moreover, being a start-up, it had been easier and more cost-effective for this think tank to adapt its communication tools to technological changes, compared to older establishments which may have previously made significant investments in legacy technology. Lastly, and significantly, Bruegel was relatively late in adopting some additional digital tools, such as a blog or social media channels, because it waited to craft a solid, integrated strategy before launching them.

STRATEGY FIRST

It is tempting for many organizations and institutions when setting up an online communication strategy to consider the wealth of possibilities available and drown in the multiplicity of tools, driven by the perceived need to be present everywhere and to be seen as up-to-date, cutting edge communicators. However, the strategic goals of an organization cannot always be satisfied by the plethora of social media or by digitizing every single item of content that a research institution is producing. Not everything should necessarily be online and when online tools are used, they also need to be thought of carefully.

Saying 'no' to an idea is very hard, especially when your competitor might be doing exactly the same, and successfully, and the first instinct is to emulate others. It is tempting to want to do everything and be everywhere. But a strategic approach to communication should avoid doing things solely because everyone else is doing it. Is it now better, as research organizations, to be perceived as more brilliant in particular significant specialized areas than be mediocre in many?

But more importantly, the decision to pursue any particular idea should always be viewed in terms of the mission and wider goals of the organization. For example, focusing solely on social media distribution might not necessarily be the most optimal use of the digital tools for the specific goals of our organization. If the aim of an institution, for example, is to primarily participate in the debate in the academic community it would be ineffective to use a channel such as Instagram or Snapchat, which would be better suited to reach out to students, for instance.

If you have a badly-defined goal and your only measure of success is based on the size of the numbers involved, you may think you are doing a good job, but this is not always the case. At Bruegel, for example, our mission is to improve economic policy-making through high quality and independent research. Therefore, our goal is not simply to distribute our content but to have the reader change something as a consequence of our research. To achieve that, we need to understand what each reader can contribute in change (specifically in changing economic policy) and what will motivate them to do so.

Every time we consider updating our communication strategy we always ask ourselves if and how it will help us achieve that goal and how the tools chosen might compare to other available tools and resources that would need to be deployed to implement it. However, before even starting to detail the methodologies and tools to implement the strategy, we ask ourselves who are the audiences we are addressing.

DEFINE YOUR AUDIENCES

Audience segmentation is one of the foundations upon which the communication effort is built: What is it, then? And why does it matter so much?

Before proposing a formal definition, it is useful to approach the question intuitively. Each of us is often engaged in persuasive or educational communication efforts directed at colleagues, family, friends and acquaintances. In each case, it is second nature to adapt the style and content of our communication to the idiosyncrasies of our audience. We may threaten, cajole or plead with our children; temper our requests with terms of endearment in conversation with our significant other; modestly allude to our achievements when meeting with our supervisors. What is appropriate in one case will not, normally, be appropriate in another. The contexts, the expectations, the needs, the frames of reference of our audience in each case differ, sometimes dramatically. By the same token, the expectations, needs and frames of reference of audiences for communicating research results or in the context of higher education institutions differ as well.

Unfortunately, the nature of these differences is not always as obvious. Ideally, we would have intimate knowledge of each audience member's concerns, fears, interests and desires and adjust our communication accordingly. Instead, we are confronted with the necessity of communicating to a public or community that is largely faceless with the exception of a few cases with whom we happen to be acquainted. We must make a limited number of distinctions amongst our audience and group them in a way that permits us to tailor our messages to persons with widely varying concerns, needs and levels of knowledge.

Audience segmentation, then, is best defined in functional or operational terms. Grunig (1989) summarizes the criteria for segmentation found in the marketing literature: 'In general, segments must be definable, mutually exclusive, measurable, accessible, pertinent to an organisation's mission, reachable with communication in an affordable way and large enough to be substantial and to service economically' (Grunig, 1989: 203).

It is more efficient, in term of maximizing impact within given resources, to identify groups of people who are similar in important respects and tailor one's communication content and delivery to them. To rephrase this in operational terms, audience segments have the following qualities: (a) members of a segment share similar antecedent qualities – knowledge, concerns, motivations – that permit tailoring of messages; and (b) members of a segment can be reached through similar media, organizational or interpersonal channels.

There is no simple formula or 'cookbook recipe' for identifying antecedents or creating segments. As a result, the process of audience segmentation has developed a reputation for being more art than science, a matter of informed and intelligent guesswork.

At Bruegel, since its inception, we have had several exercises of audience segmentation. As the organization gradually expanded the scope and range of its activities, research areas and publications, it increased the number and type of members and partner organizations and diversified its contacts. The think tank consequently had to deal with a wider range of stakeholders, each holding a unique relationship to the organization. Following this evolution, different stages of organizational development have corresponded to adapting our approach to audience segmentation to new circumstances. We can identify three moments within the evolutionary arc so far.

In the beginning, audience segmentation was simple, which reflected not only the need for size-appropriate operations with limited resources, but also the necessity to segment to identify where we could most effectively work when we were new and no one knew who we were or what we did. In practice, our audience map looked like a pyramid. Policy makers at the top, policy-influential

individuals in the middle, everyone else at the bottom. We designed more tools for the middle section because that is where the greatest potential laid when the brand was still relatively unknown.

The needs and expectations of each stakeholder group being very different, it became crucial to target them individually in order to meet these needs. Growth in output did lead to that more sophisticated segmentation, but it was also growth in reputation and brand. If we were able to, we would have had this individualistic approach from the beginning. But resources, brand recognition and other factors ruled this out. This is an interesting experience also for other research organizations who might have a similar resource restraint that doesn't allow them to be so granular in their segmentation. It shows that there is something good they can achieve in the meantime and that can lay the ground for further recognition and visibility.

In a second phase we developed the exercise further and added the criteria of potential engagement in and with Bruegel. This led to the definition of three additional circles of people: those directly involved in Bruegel's activities; those that were contributing or had contributed to our activities, but their main engagement lay elsewhere; and the external audiences who may have become engaged in Bruegel either with potential to support our activities and projects or those with high influence in their field who could relay Bruegel's ideas to other target audiences and those who had the power to implement Bruegel's policy recommendations. This classification also took in consideration that individuals could belong to different groups at the same time, according to their changing level of engagement.

After a few years, however, that exercise only partially continues to match the evolving landscape of the audience and our developing ability to be more sophisticated in segmenting it. For this reason, we are now reviewing the previous segmentation. We identified the need to ground this exercise even more closely in the overarching goal of maximizing the impact of our research output to influence public policies.

Since Bruegel expanded its capacity in more research areas, we are in the process of differentiating the mapping of key actors dealing with several specific topics. So, whilst the original segmentation is still valid, we are adding additional layers to make our outreach more granular and impactful. We strive towards more customized segmentations that incorporate subcategories and keeping data about the audience constantly updated, as behaviours and groups change.

MONITOR AUDIENCES' BEHAVIOURS

It is important to determine audience behavioural goals in context, as communication messages presented to potential readers on specific platforms without adequate knowledge of their behavioural patterns in various contexts risks falling flat. Knowing how your readers and influencers use the platforms is a very important step in order not to miss the target.

Let's make an example to understand that better. Around 40 per cent of Europeans are on Facebook, which makes it a great tool for outreach to many different audiences. However, if we consider political engagement, while for certain specific groups and causes it may be the most fitting for mobilizing and calling for action, for other groups it may not, as even if they are active there they might prefer using that media for other purposes.

At Bruegel, when we have embarked on redesigns of the website, we followed several steps to introduce new features or retire existing ones. First, re-examining the core of our output, second, surveying (and understanding) the behaviours and needs of our website audiences and third, creating

benchmarks to assess the strategic success after a test phase. This process resulted in a clearer match of access to the content and the mission of the organization and much clearer navigation for the users. In our most recent redesign some of the proposed changes were based on the initial assumption, drawn from general statistics about the evolution of users' behaviours and from survey replies, that our readers would overwhelmingly switch towards consuming websites through a mobile device rather than a desktop. That assumption, which was generally valid as a society trend, turned out to be wrong in the case of our readers and after closely monitoring the results over a first set of months, we decided to change the approach towards an editorially-curated desktop homepage.

This experience shows a simple, but crucial lesson. It is important to get to know the public you want to target. And asking the audience is essential, but monitoring their subsequent behaviours is even more important, as the two might not match all the time.

Another key element to bear in mind is that the relation between influencers, policy makers and wider public is a lot more dynamic than it used to be. During the Brexit campaign, for example, policy makers did not suddenly give up considering the facts when making policy decisions. But the way facts were being verified, how digital platforms had the potential to self-certify 'facts' or give a greater value to impressions, changed the course of the debate and the basis upon which voters took their decisions.

Moreover, the speed at which public opinion has impact on the policy debate has changed, through digital platforms and the clearer evidence as to what public opinion might be. Before public opinion was something that could be measured only with huge investment. The cost of data linked to actual behaviours of online users dropped for many platforms overnight. Another example of this can be drawn from the Brexit debate, where a sentiment analysis on Twitter was revealed to be better and cheaper for measuring voting intentions than commercial polls carried out by expensive companies (Müller and Porcaro, 2016).

ALIGN AND MONITOR YOUR TOOLS

As I have discussed, there is no 'one size fits all' methodology to define and constantly update your audiences. Also, what can be valid for one organization will not be for another. However, once the exercise is done correctly and consistently with the goals of your organization, then it allows for matching of an audience segment with relevant products.

In principle, every research output can be designed for a specific audience and parts of the same contribution can be designed and targeted for specific groups. Research, and messages, can be broken down, simplified or enriched and can lead to several outputs: long essays, academic papers, videos, podcasts, interviews, 140-character tweets or visual images. The key is to be aware for every product produced, who the researcher/institution wants the audience to be.

At Bruegel, our diverse editorial output is tailored to reach different audiences. Policy Briefs are aimed primarily at a policy audience and provide concise, strategic analysis of current issues plus concrete policy recommendations. They are designed to have an impact ahead of policy development or in the evaluation of existing policy frameworks. Policy contributions are focused and concise analytical papers, which contribute to ongoing debates while policies are being drafted. They also include testimonies at hearings or responses to political consultation papers during earlier stages of policy-making. Working papers aim to foster academic debate and can be pitched to academic journals. Blueprints are longer reports that explore a particular policy area in more depth. They are technical studies, with a wider time horizon, leading to policy conclusions. We also publish essays and lectures

on topical questions that may be relevant to or arise from Bruegel events. While these started originally as primarily printed output, nowadays, they have been moved online, recently introducing a customized online reader to give greater accessibility and providing print-on-demand services for the longer pieces.

Moreover, since 2012 we have established a blog that has become influential as a source of timely analysis on the latest developments in economic policy, for policy makers, influencers and journalists. The blog is a tool to promote our work to a wider audience by providing information about ongoing research or less technical summaries of working papers and academic debates.

Last but not least, we use social media, primarily Twitter, to successfully promote our scholars and their research, focusing the outreach towards the different target audiences identified for each editorial output. However, as with target audience fluidity, so with tactics and tools that worked yesterday may no longer be as effective as today. The platforms where we distribute research, such as Twitter or Facebook, are constantly changing their strategies. Whether it is a tweak to their complex algorithms or slower user growth, we have to respond accordingly. For example, how to make a certain post visible to your followers and what kind of engagement is expected by them changes overtime. Platforms are more and more pushing their users to stay within their ecosystem, rather than jumping between them, or encouraging users to leave them to visit other websites.

A striking case of how fast this can change is Facebook with YouTube. These used to be complementary tools and posting a video on YouTube while sharing it on Facebook has been for a while standard practice to maximizing video content outreach. With a change in strategy they become in competition with each other. Now Facebook penalizes the posting of YouTube videos, making them less visible in their feeds. This fluidity of audience behaviours and of digital platforms' evolution makes it even more important to set up monitoring tools to measure and adjust the impact of online outreach.

At Bruegel we use quarterly and annual outreach reports, which consider multiple aspects of the communication strategy. These reports are rooted to the research output and researchers' visibility and consider their presence over various channels: from traditional press, to events, from website statistics to social media. The statistics provide measurable metrics about users' engagement on social media, online readership analytics, press mentions and other available data. By monitoring both online and offline channels together, we have an overview of the situation and we can make necessary adjustments on the way. In parallel, we build a qualitative analysis based on our own values and goals, which is especially important when it comes to measuring policy impact, as it is usually difficult to grasp with quantitative benchmarks. In Bruegel's case, this monitoring system helps also in identifying any gap in our strategy and engenders lively discussions about various options that may fill that gap, including new tools.

CONCLUSIONS

Being online today is definitely something a research organization can benefit from greatly. But it is always important to remain faithful to the original goals of the organization and to ask yourself why that specific campaign or that new online channel could be an added value to promote that specific piece of research, and towards which kind of people that research was designed for in the first place.

In the case of Bruegel, what has worked to set up an online (and offline) communication strategy, was a clear definition of the goals and a segmentation of the audience, which has led to the differentiation of the offer, both in terms of editorial formats, as well as in terms of distribution channels. Moreover,

what has been working for Bruegel has also been a close connection between researchers and communicators. Outreach has been seen as part of achieving our mission and not as a separate aspect from the core business of research, even when resources were very limited, such as at the beginning. Success is not based (solely) on the size of our communication team, but rather on how we are capable of capitalizing on the whole organizational efforts. Everyone plays a role in it and this is one important factor that maximizes impact and efficiency.

Our communication strategy grew in tandem with our profile, branding and reputation over the years, but it is also characterized by consistency and a long-term approach. Technology certainly facilitated this evolution, the capacity of our human resources in responding to specific challenges to reach in a timely and cost-effective manner our target audiences has been a crucial factor. This is a common challenge also for other policy-oriented research institutes and could certainly be broadened to the efforts needed to set-up a more efficient way to share and communicate research on a broader spectrum.

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