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# LOOK WHO'S TALKING.

**THE INTERNAL COMMUNICATIONS ANNUAL REPORT 2007**















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The Internal Communications Annual Report 2007 is devised, researched, written and produced by AB and England Marketing. Thank you to those senior internal communicators who helped us along the way. Copies of the report are sent to all participants in the research. A limited number are available, free of charge, to others with an interest in internal communications. To ensure you receive next year's Internal Communications Annual Report, join the subscription list by going to [www.abcomm.co.uk](http://www.abcomm.co.uk) and clicking on IC Annual Report.



## KEY FINDINGS

The number of channels promoting **user-generated content** is rising sharply. Employees are becoming **active participants** in the communication process.

The **expectations** placed on internal communications (IC) are growing – but skills, resources and budgets are not.

Helping to **deliver change** is the greatest challenge for IC.

IC is embracing new technologies. Nearly **80%** have introduced a **new screen-based** channel in the last 12 months.

**65%** of respondents say they have a **voice at the top table** – but their biggest **frustration** is still senior management's **lack of understanding** about IC.

**60%** believe IC is helping to **deliver business strategy** inside their organisations. But **20%** say their companies still take **IC less seriously** than external comms.

Senior professionals say that, above all, they need people with the ability to **advise and influence** at a senior level.



Tomorrow's challenge is to make communication personal – less broadcasting and more individualisation.\*

\* The quotes throughout the Report are verbatim comments from senior internal communicators.



## EXECUTIVE SUMMARY

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**Welcome to the first ‘state of the nation’ report into internal communications, based on confidential, in-depth interviews with some of the UK’s most senior internal communicators.**

This report is destined to become the indispensable annual guide to developments inside internal communications (IC). It is written for all IC professionals, especially those wishing to benchmark their budgets, channels, skills and influence round the boardroom table.

In time, this report will give you year-on-year trends – charting the course of internal communications as it develops its role within UK plc.

We kick off with the results for 2007. This has proved an interesting set of results, not least because at the heart of them lies a striking anomaly.

On one hand, IC is gaining credibility as a serious business function. Over 60% strongly agree that their role is much more than distributing information; it’s about helping employees to understand and deliver business strategy. IC seems to no longer be the poor relation to external communications. Nearly 70% of respondents say that IC is given as much importance inside

their organisation as external communications. Furthermore, around 65% of senior practitioners say they have a voice and influence at the top table.

However, our research also shows that practitioners’ biggest frustration is lack of IC awareness and understanding among their leadership teams. One interviewee said: “There are still some who don’t appreciate the value of internal communications – we are considered an afterthought.” Another told us: “Old attitudes remain in some parts of the board room – we are not recognised as a professional discipline, such as Marketing or HR.” The cry from practitioners is that IC is seen as “tactical, not strategic”.

This leads to a number of frustrations. Respondents told us that too often they are called after the event, and are not part of the key decision-making process. Their budgets and resources are not equal to the job they can – and want – to do. They lack sponsorship at a senior level.

Many speak of the frustration of getting management to see the value of what is still the most effective method of communication – face-to-face. “Great leadership is about great communication but we have too many leaders at all levels who think communication



means pressing the 'send' button on an email."

Given this backdrop, perhaps it is not surprising that senior IC managers want, above all, people who can 'influence and advise at a senior level'. It is no longer enough to have the inquiring mind and succinct prose of a print journalist. Our research shows that senior practitioners want people who understand business strategy and have excellent networking skills.

What does the future hold for IC? The number one challenge, say interviewees, is responding to the growing number of change initiatives that organisations are keen to pursue. Teams are being asked to help embed restructurings, new business or process programmes, new strategies and senior appointments. Organisations want these changes to make a tangible difference. They expect IC not just to communicate the message but to help change behaviour.

The rapid advance of information technology is resulting in another set of challenges. Nearly 80% of senior practitioners have introduced a new method of communication into their organisation in the last 12 months. More than 70% are currently exploring new channels for future

use. Overwhelmingly, these are online channels – blogs, chatrooms, web forums – that allow new types of conversation to take place inside organisations.

Today, employees can engage in a fast and frank exchange of views. Opinions are starting to flow freely across old hierarchical boundaries. Ideas are being harvested from people regardless of rank or location. The employee is now an active participant in the communication process. The challenge for IC is to harness the power of new technology and ensure this leads to increased understanding, not just increased chatter.

This casts the internal communicators in an entirely new role. They no longer control the message. Instead, they must act as facilitator and mediator.

The conclusion must be that the profession has come a long way in recent years but the journey is far from over. The battle to establish the discipline as more than the publisher of information – the corporate postal service – is almost won.

However, IC must win over an intransigent minority before it can fully lay claim to the role of senior, strategic advisor.



Self-selection and e-delivery are the easiest comms methods to deliver, but face-to-face is the best way to engage.



# ROLE OF INTERNAL COMMUNICATIONS

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## THE IMPORTANCE OF INTERNAL COMMUNICATIONS

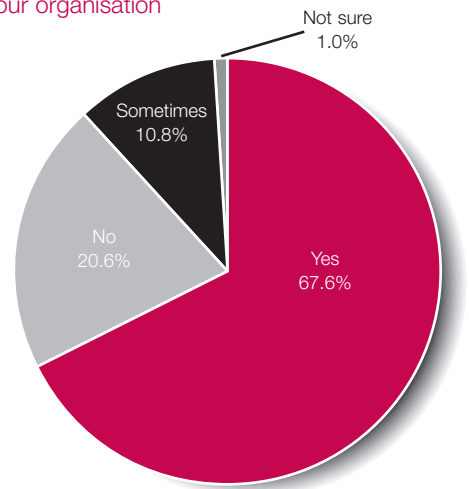
**The majority of the profession (nearly 70%) say that IC is given as much importance as external communications within their organisations.**

Around 11% said IC is only 'sometimes' considered more important. However, a significant minority, 20%, are working for organisations where internal communications is seen as the poor relation compared to external communications.

Our survey suggests that the size of the workforce is unlikely to influence how seriously the organisation takes internal communication.

However, a clear pattern emerges when we analyse this data by sector. Telecommunications, manufacturing, retail and business/professional services are the four sectors most likely to see IC as just as important as external communications. Our survey suggests that IC is more likely to struggle for due consideration in the engineering and charitable/not-for-profit sectors.

Is IC given as much importance inside your organisation as external communications?



## DOES IC HELP TO DELIVER BUSINESS STRATEGY?

**We asked interviewees whether they agreed with the statement: “The role of IC in my organisation is much more than distributing information; it is about helping employees to understand and deliver business strategy.”**

A resounding 62% strongly agreed and 31% agreed with the statement.

A minor 2% said that IC inside their companies is not performing anything more than a postal service.

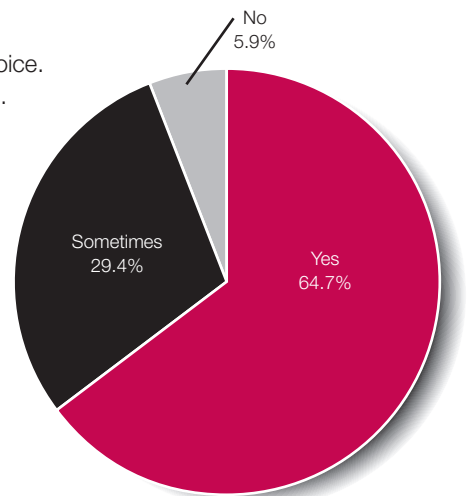
## DO IC PROFESSIONALS HAVE INFLUENCE AT THE TOP TABLE?

**Two-thirds of senior IC professionals feel they have a voice at the top table.**

Just less than one-third feel they ‘sometimes’ have a voice. Only 6% of practitioners answered ‘no’ to this question.

Our research suggests that if you want to be taken seriously by senior colleagues, the size of your organisation matters far less than the sector you work in. Your chances of having a voice at the top table are better if you work in financial services, manufacturing or the retail sector. This is less true in charitable organisations, the public sector and business/professional services.

Do you feel that you have a voice and influence at the top table?



# COMMUNICATION CHANNELS



Tomorrow's channels are more collaborative tools – blogs, message boards and webcasts.

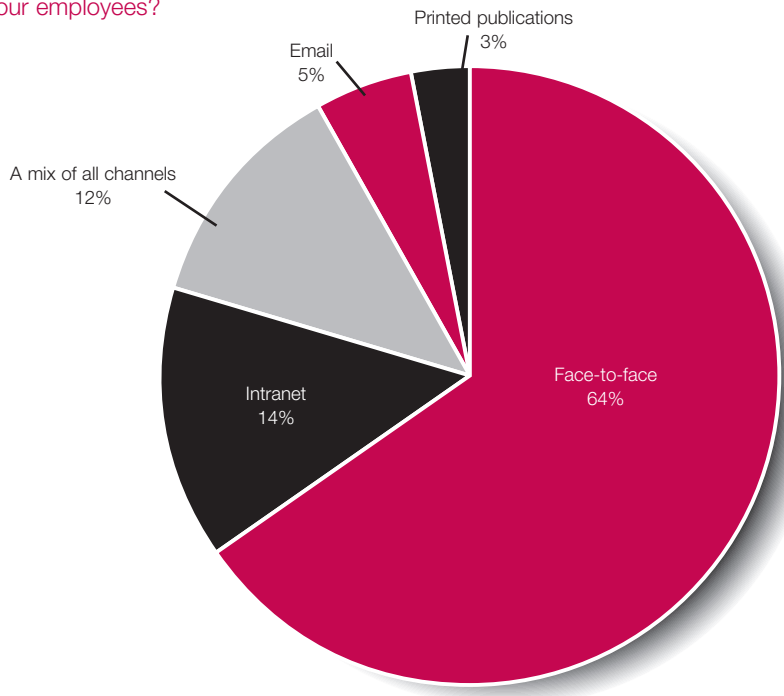
## THE SUPREMACY OF FACE-TO-FACE

**Senior internal communicators feel that face-to-face communication is the single most effective way of communicating with employees.** An overwhelming 64% put face-to-face communication – line manager briefings, live events or more informal conversations between management and employees – well ahead of any other method of communicating.

The next most effective channel, the intranet, was mentioned by just 14% of respondents. Around 12% said that, due to the size and diversity of their audience, it was impossible to pick one channel; instead, a range of complementary channels on screen, paper and face-to-face are necessary.

Only 3% say that printed publications are their most effective channel.

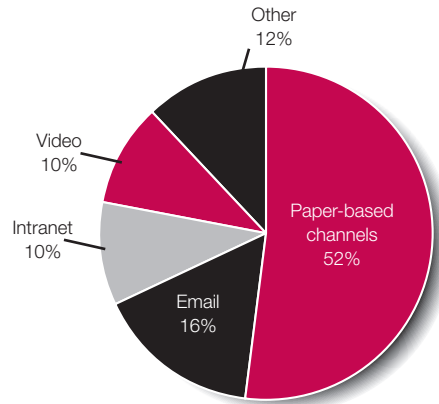
What's the single most effective way of communicating with your employees?



## CHANNELS IN DECLINE

**Our survey indicates that channel usage is far from static.** Nearly 40% have stopped using at least one channel in the last 12 months (between April 2006 to April 2007). The majority of these are print channels – newsletters, magazines, briefing documents and booklets. The next channel most in decline is email.

Which channels have you stopped using over the last 12 months?



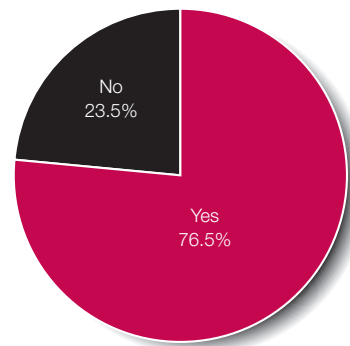
## NEW METHODS OF COMMUNICATION

Have you introduced any new methods of communication over the last 12 months?

Our survey shows that the majority of senior IC professionals (76%) are exploring and adopting new channels.

The results show a clear trend towards the use of online technology, particularly with a view to developing 'social media' – communications methods that enable employees to share opinions, insights, experiences and perspectives.

This reflects the phenomenal growth of internet sites promoting user-generated content such as MySpace, Wikipedia, YouTube and Facebook.





We are exploring social networking – wikis, blogs and a chatroom via the intranet.

## THE RISE OF SOCIAL MEDIA

**More than 76% of IC teams have introduced at least one new channel in the last 12 months and over 70% are exploring new channels for future use.**

Today's new channels are overwhelmingly screen-based, predominantly using the intranet to deliver video and audio broadcasts, or to provide the platform for software applications, such as blogs, wikis or chatrooms, which allow employees to build their own social networks.

Although these channels are still in their infancy – IC practitioners say they are wary of rushing in – they do suggest a significant shift in both the role and the modus operandi of the internal communicator.

Today's professionals are not the only ones crafting and disseminating content. They are giving employees the opportunity to do the same. The use of new channels that encourage user-generated content places the onus on employees to seek out and contribute to the debate and places the internal communicator in the role of facilitator and mediator.

The challenge for IC is to ensure that more communication leads to greater understanding – not just increased chatter.

What new channels have you introduced in the past 12 months?

- 1.** Intranet
- 2.** Webcasts and video streaming online (i.e. live or delayed sound or video broadcasts).  
Blogs (i.e. regularly updated online diary entries)
- 3.** Teleconferencing/telephone messaging
- 4.** Online magazines and face-to-face communication
- 5.** Podcasts
- 6.** Text messaging, printed publications and DVDs



I'm cautious about blogging – unless the culture's right, it's just more anodyne corporate waffle.

# MEASURING EFFECTIVENESS

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**There is a clear move away from relying solely on the annual employee survey to measure the effectiveness of IC to more frequent 'spot checks'.** Indeed, almost 90% say that they are augmenting the annual survey with regular questionnaires – paper-based or online – and face-to-face feedback.

Our survey shows that internal communicators want to use technology to measure the 'pulse' of their organisation on a regular basis. But few teams have these tools fully up and running.

Currently, the effectiveness of the intranet is largely measured by counting hit rates or read receipts. Full usability testing is still in its infancy. Only a small percentage of professionals are using more dynamic measurement techniques that give an analysis of how and why employees are using the intranet; how long it takes to find what they need; and how many searches are abandoned because the information is not available. Only a few cutting-edge intranet sites allow employees to give a 'star rating' on specific pages.

Formal listening groups and focus groups are popular methods of measurement, as are more informal question-and-answer sessions between senior managers and employees. However, only some ensure feedback and follow-up with 'champions' in each team. While some internal communication departments are using specialist external research agencies, the majority are undertaking at least some of their measurement in-house.

## Top four measurement techniques

- 1.** Regular 'spot checks' using online or paper-based surveys or questionnaires (generally quarterly, bi-monthly or monthly)
- 2.** Face-to-face feedback in listening or focus groups
- 3.** Annual staff survey (paper or online)
- 4.** Web metrics – trends, hit rates, search criteria



Our intranet data – trends, hit rates, search criteria – is analysed monthly.

## **BIGGEST FRUSTRATION WITH IC**

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“

My biggest frustration is the continuing perception that internal comms are the 'post bags' of the organisation. We need to get recognition for the overall contribution we can make.

“

IC are the people who come along to mop up afterwards!

**1** **By far the greatest frustration in the profession is the lack of awareness and understanding, particularly among senior management, about the role of internal communications and what it can achieve.** Respondents told us that there were still 'old attitudes' in the boardroom and that lack of sponsorship and support made the job more difficult. As one senior IC manager explained: "The perception is that IC is all about channels – and not about advising and influencing."

**2** Lack of resources, skills and budget is a key frustration. More and more is being asked of IC departments. But as expectations grow, along with the number of channels and change initiatives, many feel their teams are lacking the necessary skills and the budget to deliver this increased workload. One IC manager said: "Some people in IC have no professional journalistic or PR skills. There seems to be a skills gap – lots of 'happy amateurs' doing too much planning and not enough action. We are moving into the age of the 'citizen journalist', which means less control over the message. With the introduction of new technology that everyone can use, IC teams need to move away from yesterday's old-fashioned skills."

**3** The third most mentioned frustration is with line managers' face-to-face communications skills – either the importance of face-to-face communication is not properly recognised or managers lack the skills and training to deliver face-to-face communication effectively.

**4** There is also frustration that IC is not brought into the communication process early enough. Too often, the team is considered 'an afterthought'. As a result, IC is not as involved as it should be in the planning process. This often leads to 'mopping up' after the event.

Other frustrations include directors' multiple agendas and the sheer number of change programmes. The pace of technological change brings its own set of problems. Either employees expect the same level of IT sophistication at work as they have at home, or employees are described as 'apathetic' when it comes to embracing new channels and taking ownership for seeking out the message. And, despite advances in online communication, IC professionals are still thwarted when trying to communicate to all staff within a 24-hour period.

## **GREATEST CHALLENGE FOR IC**

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**1** **Responding to change – and helping to deliver change initiatives – are the greatest challenges facing internal communications over the next 12 months.** IC is having to grapple with structural changes, such as globalisation or centralisation; changes to senior leadership teams, particularly the appointment of new CEOs; and the increasing number of change programmes.

**2** Harnessing the power of face-to-face communication, particularly between line managers and their teams, is the next challenge. Establishing genuine dialogue and gaining feedback is seen as vital, yet too often overlooked, or managers lack the skills to communicate effectively.

**3** How do we truly engage employees to behave differently – or ‘live the brand’? The challenge for IC is to go beyond merely presenting a message, but instead to connect with employees on a more meaningful level. One manager describes it as “keeping people inspired”. Another said: “Our greatest challenge is to help people to understand the strategic direction of the business and stay emotionally engaged.”

**4** Also mentioned is the seemingly perennial problem of how IC proves its worth among senior management and demonstrates that it can and should play a strategic, rather than tactical, role. “IC’s greatest challenge is to gain real business credibility,” said one IC manager.

**5** Less mentioned challenges, but still worthy of note, are those challenges connected with the growth and capability of today’s online channels. The challenge is to cut through the growing ‘noise’, misinformation and gossip. The new channels must be used intelligently – not simply adopted because they are readily available. “The technologies that help us – blogs, texting – also work against us, as misinformation is passed on much more quickly than before,” said one interviewee.

**6** Finally, a significant minority of IC managers are concerned about the lack of budget, skills and resources to deliver what is being asked of them. Some feel strongly that their departments lack the time, money and people to get the task done.

**“**  
There’s still this age-old problem: convincing managers that IC is just part of their day job.

**“**  
The greatest challenge is engaging first level leaders.

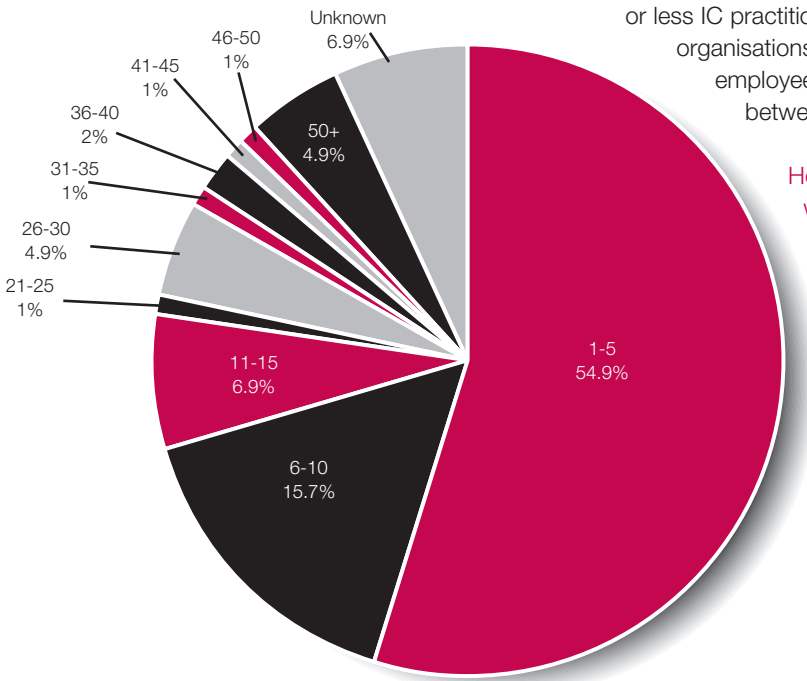
# INSIDE IC TEAMS

## THE RATIO OF IC PROFESSIONALS PER EMPLOYEE

**Senior IC practitioners are not leading large teams.** Over half of our sample (55%) manage teams of less than six people. Almost 16% has a team of 6 to 10. Only 7% has a team of 11 to 15. Those with a 50-strong team amount to just 5%.

In general, the larger the workforce, the larger the IC team. The vast majority of organisations (80%) with less than 5,000 employees have teams no larger than five. Most organisations (87%) with 5,000 to 9,999 employees have IC teams of no more than 10 practitioners. When workforces reach 29,999 or more, we start seeing teams of at least 15. Around 60% of organisations that employ 40,000 or more UK staff have IC teams of more than 31 practitioners.

However, there are some striking anomalies. About 27% of organisations we interviewed with 40,000 or more employees have five or less IC practitioners. And 22% of organisations with 10,000 to 15,000 employees have an IC team of between 11 and 30.



How many staff work in IC?

## SKILLS AND ATTRIBUTES

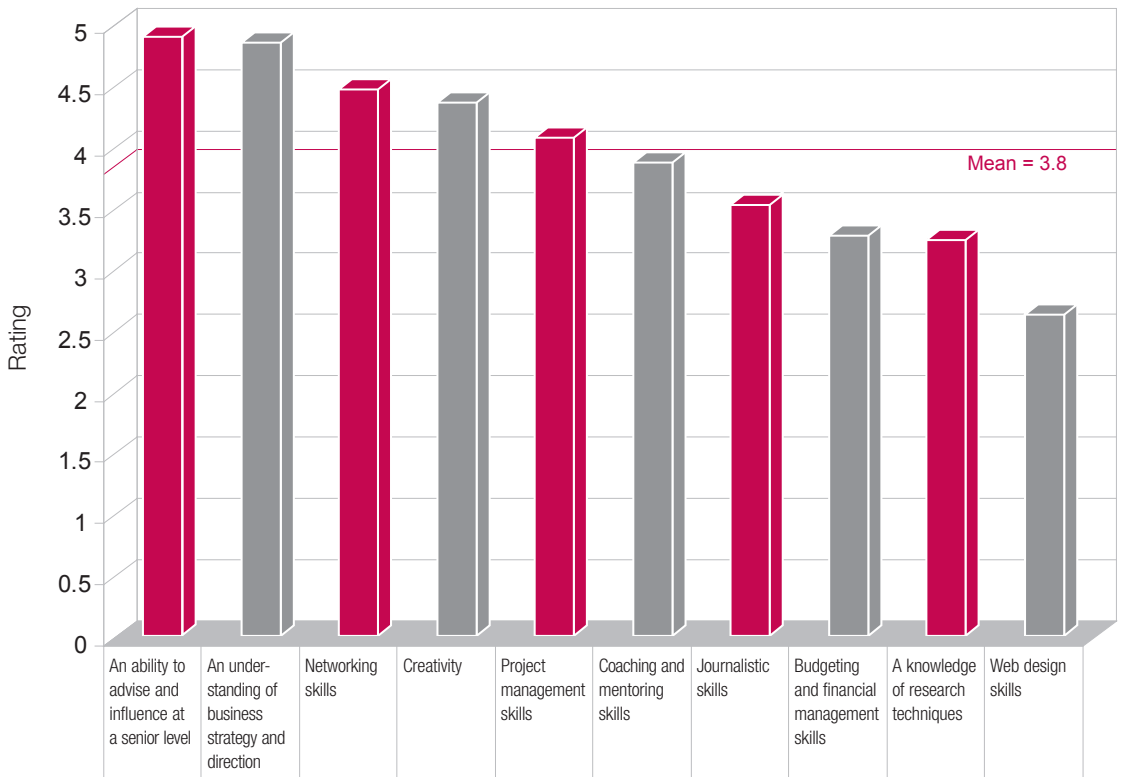
**The number one skill needed by IC professionals is ‘the ability to advise and influence at a senior level’, closely followed by ‘an understanding of business strategy and direction’.**

Perhaps more surprisingly, ‘networking skills’ were rated as the third most important attribute above ‘creativity’, ‘project management skills’ and ‘coaching and mentoring’.

Bottom of the list are ‘web design’, ‘knowledge of research techniques’ and ‘budgeting and financial management’.

*What skills and attributes are required by today’s IC professionals?*

(Respondents rated the listed skills where 1 is least important and 5 is most important)





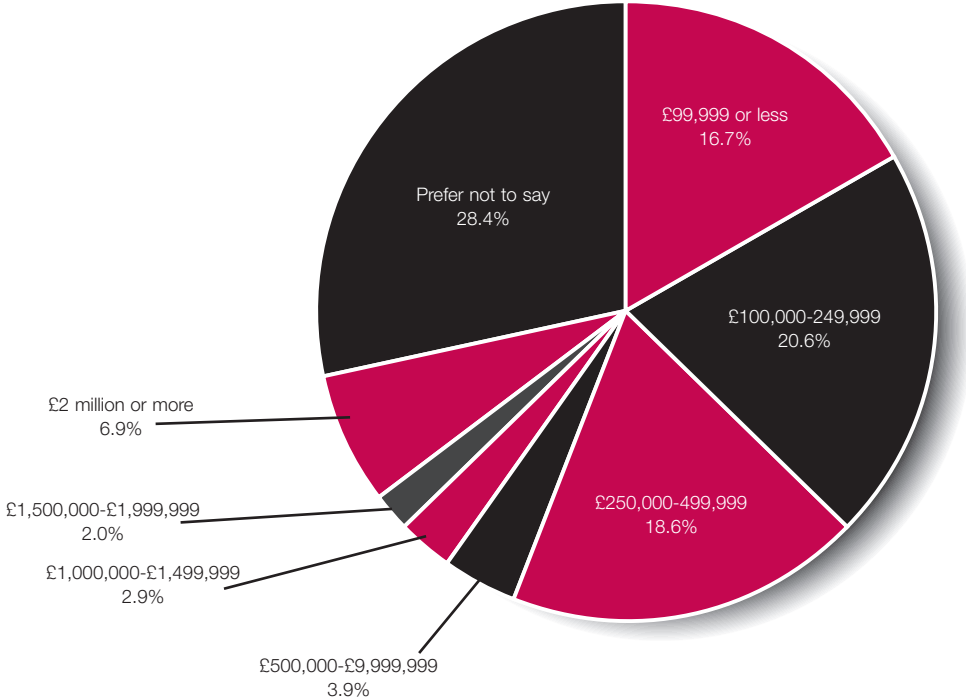
IC needs to be defined by senior management, then there's more chance that they'll buy-in to what we do.

**IC BUDGETS FOR 2007**

**Over half (56%) of our interviewees have budgets of up to £499,000.** Less than 10% have budgets of between £500,000 and £1,999,999. And 7% have budgets of £2 million or more. However, just less than one-third (28%) preferred not to disclose their IC budgets

As you would expect, the smaller the IC budget, the smaller the workforce. Those respondents working for organisations employing 1,000 to 4,999 employees are likely to have IC budgets of no more than £1 million. However, larger budgets of between £1 million to £2 million-plus are not solely the preserve of large organisations. We found examples of organisations employing less than 10,000 but with an IC budget of £2 million or more and, conversely, organisations making a budget of less than £250,000 stretch to cover internal comms for an organisation of 40,000 or more employees.

What's your company's IC budget for 2007?



## IC BUDGETS BY SECTOR

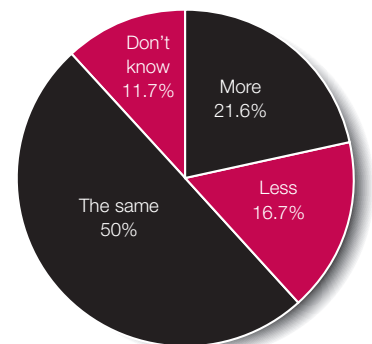
**The two sectors devoting the most money to IC are financial services and professional/business services.** Around 50% of professionals working in these sectors have budgets of more than £1 million.

Internal communications budgets for 2007 by sector

Respondents by sector	What is your company's UK internal comms budget for 2007?			
	Up to £499,999	£500,000 – £1,999,999	£2 million or more	Prefer not to say
Manufacturing	65%	14%	7%	14%
Retail	53%	8%	8%	31%
Financial services	47%	15%	11%	27%
Engineering	100%	–	–	–
Business/professional services	50%	6%	13%	31%
Transport	60%	20%	–	20%
Charity/not-for-profit	100%	–	–	–
Public	77%	–	–	23%
Telecommunications	33%	–	–	67%
Other	44%	–	–	56%

## CHANGES TO IC BUDGETS

**Internal communications budgets are on the rise – but only slightly.** Around 22% of senior IC managers have seen their budgets rise, compared with 17% who have seen their budgets fall. Half of senior IC professionals have seen no change in their budgets compared to last year. In general, smaller budgets are on the increase – of who those who have seen budgetary increase, nearly 70% have budgets of less than £500,000.



Is your budget more or less than last year's?

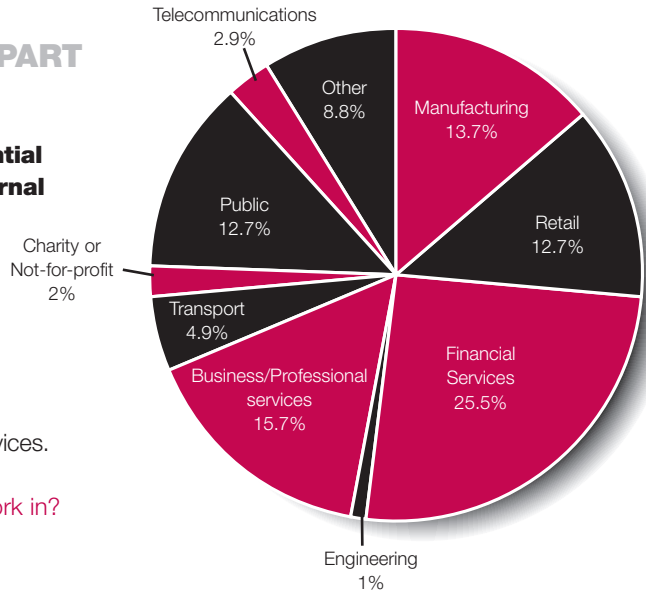
# RESEARCH DEMOGRAPHICS

## SECTORS THAT TOOK PART

**The IC Annual Report 2007 is based on in-depth and confidential interviews with 102 senior internal communications practitioners working in all sectors of UK industry.**

The composition of our sample is designed to reflect the broad composition of the UK workforce, particularly the shift in jobs from manufacturing and engineering to retail, professional and financial services.

Which sector does your company work in?

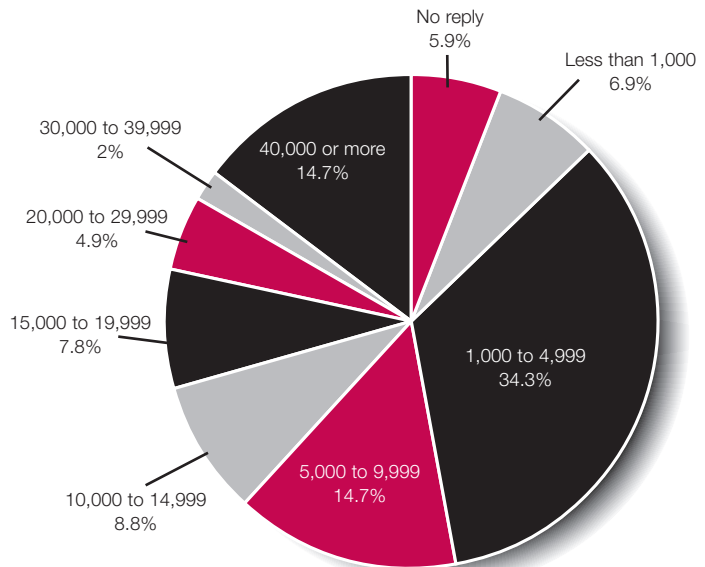


## THE SIZE OF THE ORGANISATIONS

**Our sample includes organisations of all sizes.**

The largest single group of interviewees (34%) works for organisations with between 1,000 and 4,999 employees. Almost 15% employs 40,000 or more and 7% employs less than 1,000.

How many staff does your company employ in the UK?

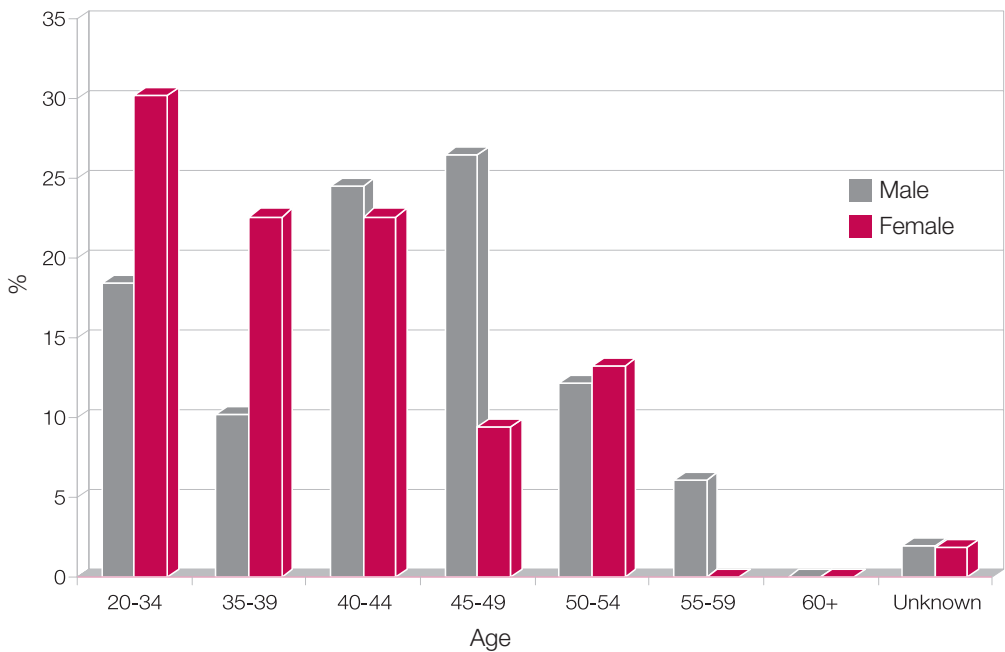


## GENDER AND AGE OF IC PROFESSIONALS

**There is an even split between men and women working in senior roles within IC, with a slight favour (54%) towards women.**

The vast majority of IC professionals sampled (65%) are under the age of 44. Female practitioners tend to be younger than their male counterparts. Just over 30% of our female sample is aged between 20 and 34, compared with 18% of men. Only 23% of women are 45 or older, whereas 45% of the men are aged 45 to 59.

What's your age and gender?





There's a lack of quality senior IC practitioners who have real influence.

## SALARIES OF SENIOR IC PROFESSIONALS

**There is a wide variety of pay packages in internal communications.**

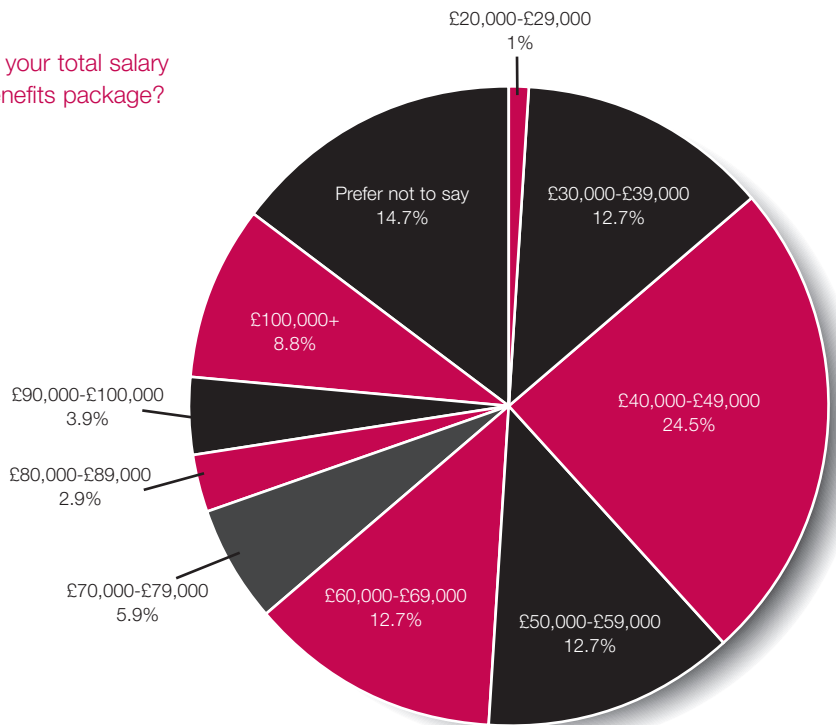
The most commonly cited salary band (24%) is between £40,000 to £49,000. Just less than 13% earn between £50,000 to £59,000 and the same percentage earn £60,000 to £69,000. Around 16% earn £80,000 or more.

In general, salary packages rise in line with the size of the workforce. Professionals earning £40,000 to £49,000 are likely to work for organisations with up to 4,999 people. Those with workforces of 10,000 to 19,000 employees are likely to be earning £80,000 to £89,000. Most earning £100,000 or more are working for companies employing 40,000-plus.

However, there are anomalies that would suggest that the size of the workforce is not the only determining factor. Salaries of senior practitioners working for organisations employing 40,000-plus people start at £30,000. Equally, it is possible to earn between £70,000 to £79,000 in a company that employs less than 1,000.

The largest IC salaries are commanded by the retail sector, with professional and financial services following a close second.

What's your total salary and benefits package?





## HELP SHAPE THE NEXT IC REPORT

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**The 2008 Internal Communications Annual Report promises to be even bigger and better – a larger sample of interviewees and new question areas.**

You can help shape our next Report by attending a special breakfast event in central London in February 2008. Invitees will have the opportunity to discuss these results and debate the questions that should be addressed in the next IC Report.

Help us make this survey as pertinent to the profession as possible.



**If you'd like more information about the IC Annual Report event or wish to discuss any aspect of our findings, please contact Katie Macaulay on 020 7922 5677 or send an email to [katie.macaulay@abcomm.co.uk](mailto:katie.macaulay@abcomm.co.uk).**

- The 2007 Internal Communications Annual Report is based on 102 confidential interviews with senior IC practitioners in all sectors of British industry. The research was conducted between April and May 2007.

The paper used in this report has been awarded the NAPM Recycled Mark. It is made from 75% recovered fibres, using chlorine-free and CarbonNeutral® processes.

AB is a CarbonNeutral® company.



**This report is available as a downloadable PDF at [www.abcomm.co.uk/icreport2007.html](http://www.abcomm.co.uk/icreport2007.html)**



The message is always more believable when delivered to staff by their leaders.



The challenge is to cut through the noise. Let's make the message simple.

## ABOUT AB

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Great communications is not an end in itself. We exist because companies who communicate better, perform better.

**Tim Buckley, AB**



### **Since the 1960s, AB has supported UK industry with its employee communications.**

From the days of highly unionised workforces, through successive economic depressions and during the unprecedented technological revolution of the 1990s, AB has advised CEOs and senior internal communicators, and played a leading role in guiding the profession's trade bodies – Communicators in Business (CiB) and International Association of Business Communicators (IABC).

Today, AB is one of the longest established, independent internal communications agencies in the UK. It puts more than one million magazines into employees' hands every year. It designs and implements screen-based and face-to-face communication and has a thriving consultancy and audit division.

Its unique Acid Test audit – which pinpoints 'communication gaps' inside organisations – is becoming the favoured approach for swift, effective measurement of internal communications across hierarchies, functions and geographies.

Managing director Tim Buckley says the secret to AB's success is its no-nonsense, no-hassle approach to internal communications.

"Our clients want fast, cost-effective and tangible results. We understand the psychology of building engagement and understanding. But, even more importantly, we turn that understanding into practical programmes that drive superior business results."



**For more information, visit [www.abcomm.co.uk](http://www.abcomm.co.uk) or contact Tim Buckley on 020 7922 5644 or write to him at [tim.buckley@abcomm.co.uk](mailto:tim.buckley@abcomm.co.uk).**

## **ABOUT ENGLAND MARKETING**

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**England Marketing is one of the UK's few specialist researchers with a true understanding of internal communications.**

It measures employee opinions and engagement, plus the effectiveness of specific channels, campaigns and change initiatives.

In all, England Marketing researches around 10,000 people each year – consumers, employees, members of voluntary and trade associations and the general public.

The agency specialises in the full spectrum of research techniques – interviewing face-to-face, in groups, on the telephone, and using the latest on-line and paper-based surveys.

Its approach to employee attitude surveys is different from standard approaches. Each survey is customised. Clear, focused questions get to the heart of what matters most to the client. Insightful, intelligent analysis gives internal communicators practical recommendations – not reams of data.

England Marketing's founder, Jan England, firmly believes that internal communicators need a special kind of research solution.

"Engagement and communications are challenging topics to research in any meaningful way. All too often, internal communicators are handed pages of statistics with no clear indication of what to do next.

"We provide knowledge, insight and practical recommendations designed to help IC teams improve their own performance and drive up employee engagement and retention."



**For more information about England Marketing, visit [www.EnglandMarketing.co.uk](http://www.EnglandMarketing.co.uk) or contact Jan England at [jan@EnglandMarketing.co.uk](mailto:jan@EnglandMarketing.co.uk) or on 01487 822320.**



We believe in research for a reason. Our clients come back to us because we give them more than a diagnosis of what's wrong.

**Jan England,  
England  
Marketing**





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