

IC 2023 INDEX

The voice of UK employees
helping to inform strategic choices
across internal communication

About us

Institute of Internal Communication

The Institute of Internal Communication exists to help organisations and people succeed through promoting internal communication of the highest standards.

We are the only professional body dedicated solely to internal communication in the UK and have been driving standards for over 70 years.

We represent more than 2,200 professionals, supporting them to build a movement of passionate, informed and dedicated IC experts.

This enables our members to leverage communication, in whatever format, to help colleagues feel informed, connected, engaged and purposeful so that they enhance organisational performance and shape workplaces for the better.

Because how we communicate at work matters. [#WeMatterAtWork](#)

Ipsos Karian and Box

Ipsos Karian and Box is a team of over 130 employee experts at the heart of Ipsos's global network of research specialists.

We're one of the fastest-growing agencies in the employee engagement and research sectors and are proud of our reputation for providing strategic insight, innovative reporting, and a flexible, high-quality service.

We've been trusted advisors to some of the biggest and best names for over 16 years, helping to create environments where people and businesses thrive by giving people a better voice at work.

Our team of business consultants, data scientists and creatives shares a wealth of experience and offers end-to-end expertise, from strategic communications advisory and holistic campaign design, to quantitative listening programmes and powerful leadership diagnostics. Together, we're driven by our belief that people with a voice power performance.

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Introduction

We need honest, reliable communications now more than ever.

We're living in a state of 'permacrisis', reeling between the immediate consequences of the pandemic, an ongoing climate crisis, and pressing cost of living concerns.

In uncertain times, we look to our leaders to provide stability. The way they communicate with us matters.

Against this turbulent backdrop, the fundamental questions remain the same for UK internal communication practitioners: How do we help those leaders communicate in a way that inspires trust? How do we talk about change? How do we champion diverse voices and enable two-way discussions? How do we manage communication platforms and get the message out on time, every time?

The way we work is undergoing its most profound transformation in a century, emphasising the essential role of effective communication to give employees a powerful and articulate voice.

It's critical in building deeper and longer-lasting connections between employees and their organisation. And it's vital for helping employees feel respectfully, authentically and truthfully informed.



Why we're working together

The aim of this study is to identify what employees across the UK want and need from their internal communication function.

Similar reports in this field tend to focus on what internal communication practitioners think is important, or what leaders want from their internal communication teams.

We wanted to take a different approach.

First and foremost, this is about the communication experiences and needs of the UK workforce. We have also brought internal communication practitioners together to home in on real industry needs.

The joint approach of IoIC's practitioners and Ipsos Karian and Box's research rigour has cemented findings in real data, providing robust insights which organisations can use to build improved internal communication strategies.

By providing a UK-wide employee view of what good communication looks like, we hope to champion internal communication as a business-critical function.

We hope you find this report valuable in helping you shape your organisation's current and future internal communication strategy.



Ghassan

Ghassan Karian

Chief Executive,
Ipsos Karian and Box



Jennifer

Jennifer Sproul

Chief Executive,
Institute of Internal Communication

What's the story?

The fundamental insights for the 2023 IC Index story

01

IC teams make a positive difference

- People value good internal communications – especially at senior levels or in smaller organisations.
- Employees are more engaged, more inclined to stay and more likely to trust what their CEO says when an IC team is in place.

02

Cheerleaders outweigh cynics, but there's work to do

- A large proportion of the UK workforce are enthusiastic about internal communications and believe messages are clear, trustworthy and useful.
- Be warned, though: there are still large groups of employees who are either negative, confused or unconvinced about the quality of internal communications.

03

We need to talk about strategy

- Getting strategy communications right is fundamental to boosting engagement.
- People also want clarity around how their organisation is performing and what the business priorities are. When that clarity is absent, confidence and engagement falter.

04

Time isn't on our side

- Employees spend very little time reading and viewing updates.
- People snack rather than binge. The majority of UK workers dip into communications briefly between – or even during – meetings.



05

Senior leaders should speak up – and use the right channels

- There's a greater positive response across all organisations when senior leaders communicate directly and authentically on things like strategy.
- People prefer to hear from their CEO through remote channels, like email and staff intranet.

06

Managers matter and could do more, but need help

- People trust communications from their direct manager but want more updates from them on team goals and priorities.
- Managers themselves aren't always confident communicators – most would like greater guidance from their communications colleagues.

07

People want to be heard

- Many employees aren't convinced that their organisation is listening to them, or that they'll see positive action on the feedback they provide.
- Staff surveys alone won't get the job done. Regular listening and manager feedback are essential for hitting high levels of positivity.

The 2023 IC Index story in numbers



Internal communications rated positively by majority

6/10

UK employees rate their employer's internal communications as excellent. Only one in ten see it as very poor.



More want to hear about employer's strategy

22^{pt}

gap between the proportion of UK employees who don't hear enough about their organisation's strategy (33%) and those who receive too much (11%).



Clarity on organisational strategy is weak for large minority

57%

of UK workers are clear on their employer's strategy – with marginally more believing in it.



Half trust what their CEO communicates

54%

trust communications from their organisation's CEO, over 10pts less than those from their own manager.



Large numbers want their manager to better communicate team priorities and performance

4/10

UK workers want their manager to better inform them about the team's priorities and goals, with another 3 in 10 wanting updates on their employer's performance.



Nearly half of UK workforce are ambassadors for their employer's strategy

45%

of UK workers are ambassadors for their employer's strategy (they understand and believe in it), compared to one in four who are 'passengers' – neither getting nor believing in it.



Email still most common and preferred channel

6/10

UK employees both rely on and prefer email as a way of hearing news about and from their employer.



Very little time to capture and keep employee attention

15

minutes or less per day is what nearly 7 in 10 UK employees say they spend reading / viewing updates from their employer.



Large minority of managers want more help communicating organisational news

1/3

line managers don't feel equipped to lead conversations with their teams about what is happening across their organisation.



Over half do not see organisations listening to and acting on feedback

53%

of UK workers say that their organisation welcomes open and honest feedback, while fewer (45%) say their employer shows how feedback is used to inform action.





How are we seen?

Perceptions of internal communication

The big picture looks good

First, some encouraging news: over half of UK workers rate their organisation's internal communications as 'excellent'.

As you'd expect, the view changes a little as we get into the details. For example, people working in smaller organisations are more likely to rate internal communications as 'excellent' – although the rating gap between small (64%) and large (57%) organisations is minimal.

There's greater inconsistency when we look at seniority. 81% of senior leaders rate internal communication as excellent, compared to 56% of team members with no management responsibilities.

Time is also a factor. Part-time employees have a below-average experience of internal communications compared to their full-time counterparts.

Sector trends

Where people work also makes a difference to their positivity. Those who work in IT are by far the most satisfied with communication from their organisation, along with people in Finance / Banking / Insurance and Hospitality.

It's a different story for those working in Education, Transportation / Distribution and Retail, where positivity hovers around 50%, as time and connection issues often limit engagement.



Sarah Meurer

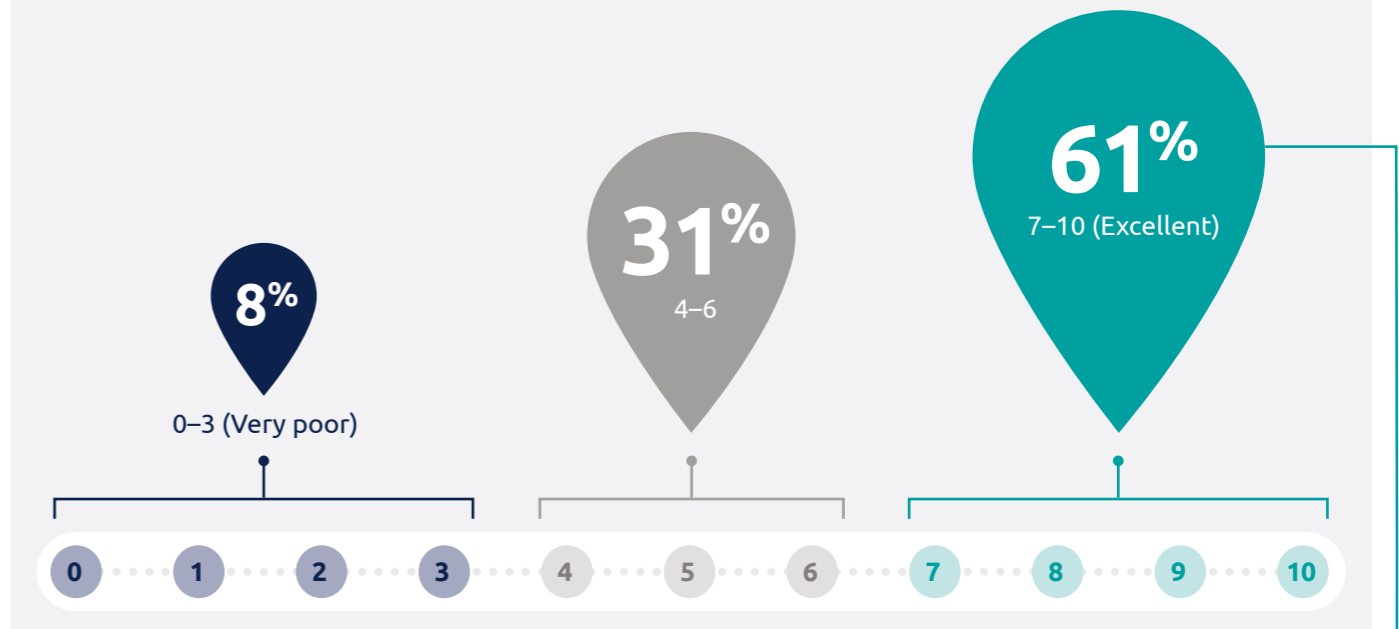
Vice President Global Communications, Elsevier

Internal communications is a critical lever that the most engaging and successful leaders use to build trust, motivate, inspire, and drive high performance with their people.

The next opportunity for internal communicators is to be relentlessly curious about the employee experience people are having from the moment they join to the moment they transition, identifying how to improve the moments that matter, continuously raising the bar for our people.

Generally positive view of internal communications across the UK

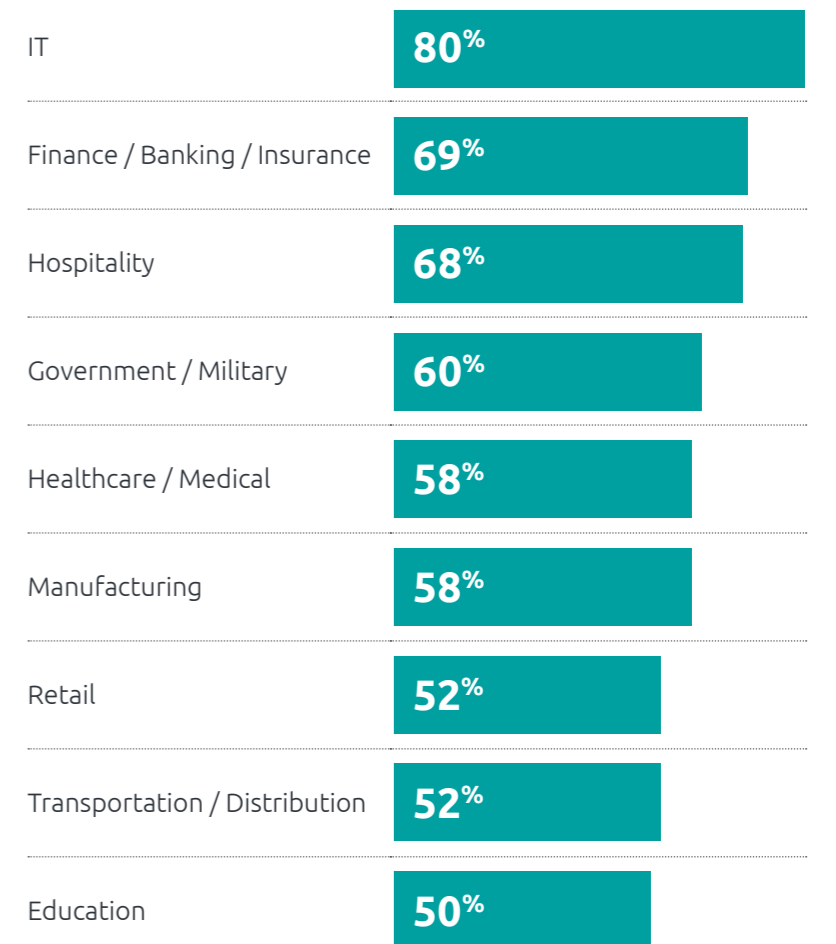
How would you rate how your organisation communicates with you overall?



Full-time UK workers rate internal communications more highly



Employees in Retail, Transport, and Education are less positive about their organisation's communications



Driving positive business outcomes

A dedicated internal communications function really does make a difference to the employee experience.

Better communication rating

69% of UK workers in organisations with an internal communications function rate communications as 'excellent', 32pts higher than those who do not.

Higher engagement

UK workers are 16pts more engaged on average when they report having an internal communications team.

Lower flight risk

Intent to leave within the next two years is 13pts lower among those who report having an internal communications team within their organisation.

Higher trust in the CEO

Three in five UK workers trust their CEO's communications when they have an internal communications team, compared to just 46% of those who don't.

Managers also benefit from an internal communications function

Managers in organisations with an IC team feel better-equipped to lead conversations about local action, 20pts on average.



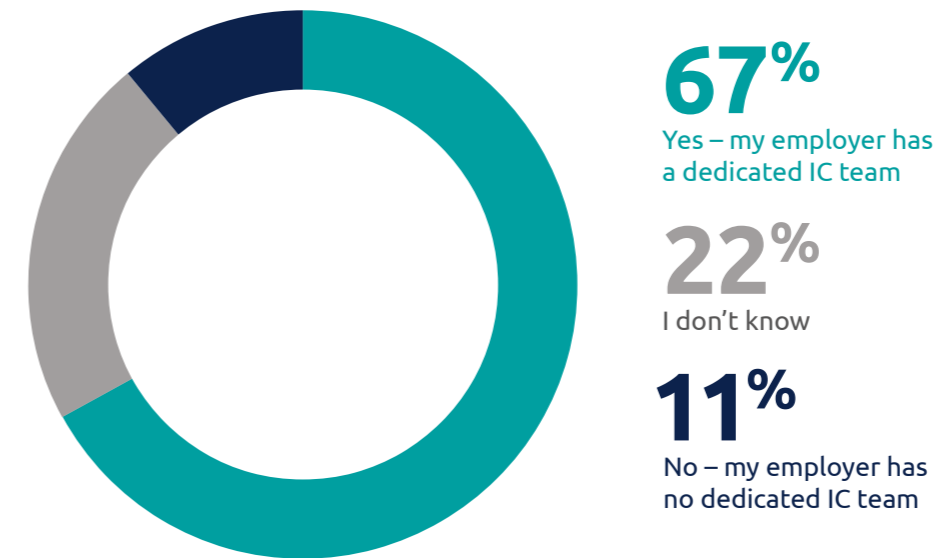
Justine Stevenson
Director of Internal Communication and Employee Engagement, AQA

For years we have championed Internal Comms as a requisite to improving engagement and, ultimately, business results. It is great to see that, through this research, our instinct is correct and Internal Comms teams are demonstrably making a difference to the employee experience.

Of course we still have more to do but this gives us great evidence to demonstrate that we are no longer a nice to have, but a fundamental requirement in a well-functioning organisation.

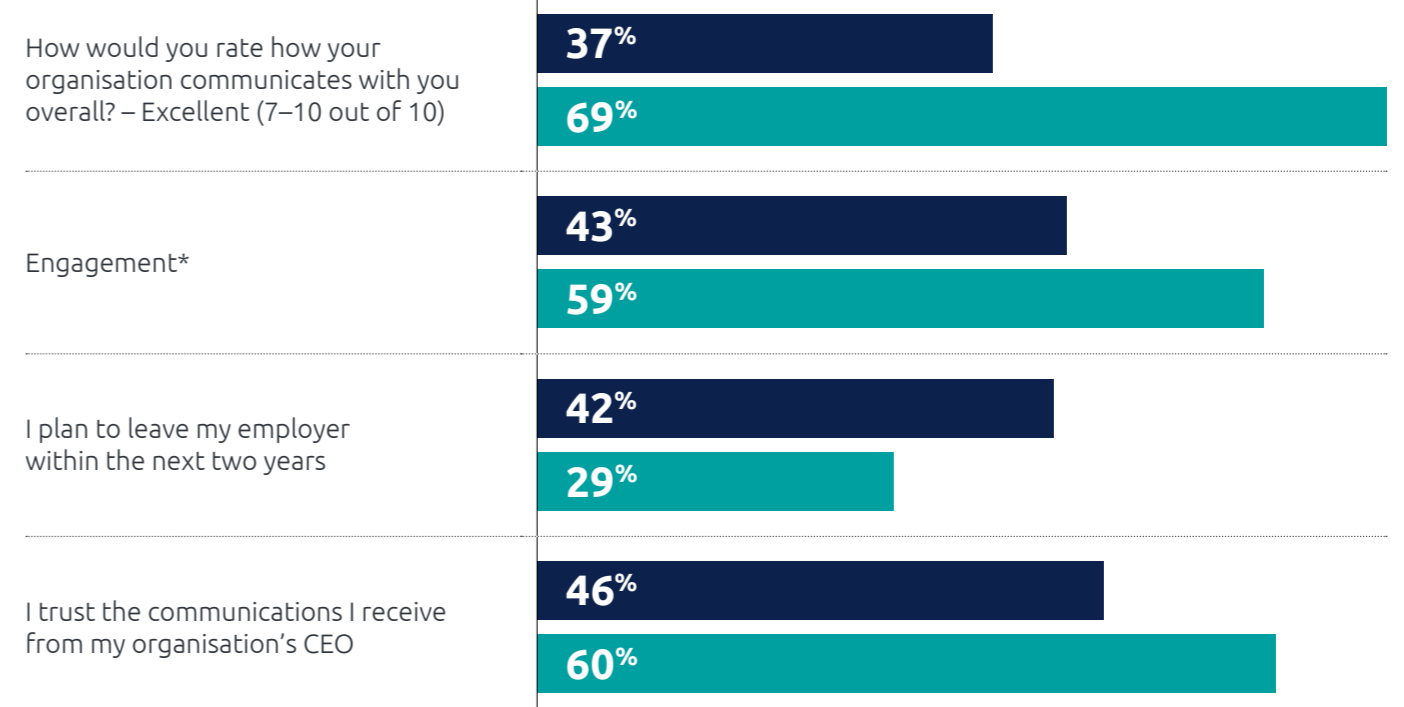
The majority of UK workers report having an internal communications team

Are you aware whether your employer has a dedicated 'internal communications' (IC) team?



Organisations with dedicated IC teams perform better on key organisational health indicators

Key: ■ No – my employer has no dedicated IC team ■ Yes – my employer has a dedicated IC team



Remember how workers in IT rate communications from their organisation the highest across all sectors?

Well, they're also most likely to report their organisation having a dedicated internal communications team (82%).

In contrast, just 51% of retail workers say their employer has a dedicated internal communications team.

* Engagement is a measure of the extent to which employees feel valued, motivated and able to do challenging and interesting work.

Driving advocacy in internal communication

We believe people deserve to feel they matter at work. Feeling valued, engaged and informed directly contributes to and delivers higher business performance.

Social belonging at work is a fundamental human need and helping people feel they can be themselves at work produces greater levels of commitment and engagement.

Effective internal communication improves team cohesion, collaboration, productivity, innovation, reputation, talent attraction and retention, and leads to more satisfied and fulfilled employees.

The IoIC's manifesto sets out nine principles all future-ready organisations must integrate to survive and thrive in the coming decade.

We believe:

- A well-defined organisational purpose helps colleagues engage more fully in their collective mission.
- Honest and transparent internal communication is key to building trust at work. Clear, authentic communication enhances organisational belonging and connection, regardless of external challenges, risks and constraints.
- High-performing organisations facilitate the smooth flow of multi-directional, open feedback. They prioritise continuous listening and acting on feedback received.

When organisations champion inclusion through the use of empathic, human-centred communication, they naturally yield greater performance, enhance their resilience and sustain operating environments.

By aligning people with collective goals, internal communication delivers motivation, context and inspiration for all stakeholders.

For the full manifesto visit ioic.org.uk

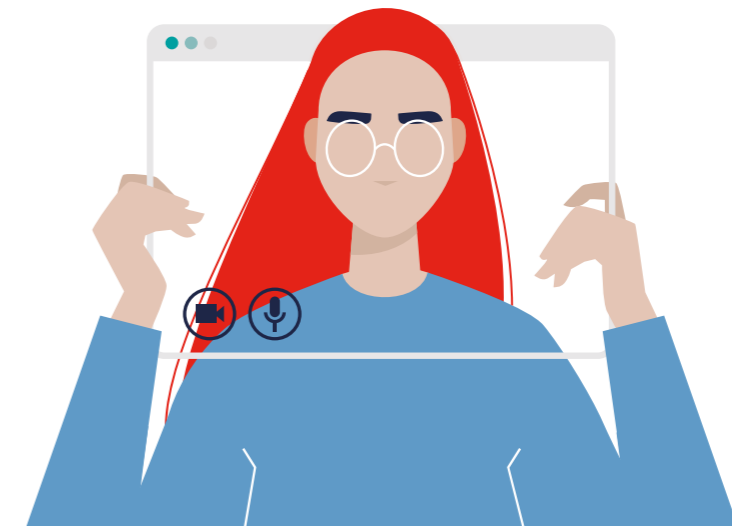


Joe Salmon

Director Communication
Business Partnerships, Global
Functions, Iron Mountain

Driving employee engagement is essential, but it's just the first step on the ladder to building pride and driving advocacy.

Employees need to feel and believe they are part of a culture where they can thrive while being themselves. It's much more than just connecting employees with the business, purpose and values. Internal Communicators need to connect people with people. That team spirit and sense of belonging is when advocacy happens.

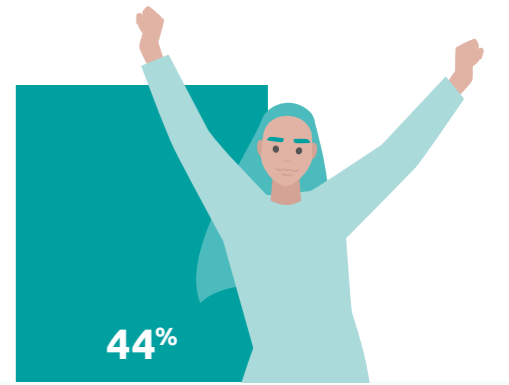
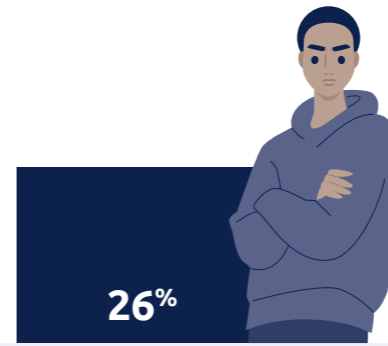
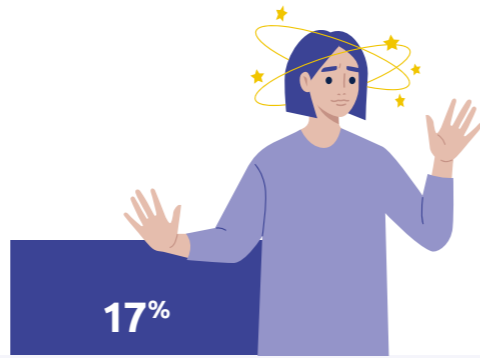
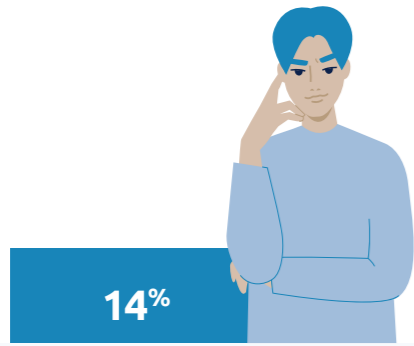


UK workers recommend their organisation as a great place to work if they...



Look who's talking

Our analysis reveals that people in the UK workforce tend to fall into one of four broad groups. Let's meet them.



Unconvinced Cynics

“ While my organisation does a great job of communicating with me, I still don't feel great about working here. My main problem is trust. I can't count on our senior leadership team to do what they say they will, and I definitely don't trust the CEO.

Confused Followers

“ On balance, I like my job. And I like our CEO. But I have to say, I don't feel particularly valued, and I'm not sure anyone cares what I think. The quality of communications I receive is pretty mediocre too. They're easy to read and informative, but they don't help me understand the changes that are happening here.

Miserable Moaners

“ Everything about working here sucks. I don't like it, I wouldn't recommend it to others and I don't trust anyone. Communication is particularly bad – I wish I got more information on pretty much everything. I rely a lot on word of mouth to hear anything.

Informed Cheerleaders

“ I love it here. My job is interesting, it's motivating, and I'm really proud to say I work here. Communications are great too – I get enough right now, but more never hurts! I even sometimes tune in to my company's podcasts and videos.

Rates communication the highest of all groups

The most likely to want their CEO to explain why change matters

Almost half (47%) intend to leave their employer in the next 2 years

The most likely to provide feedback through their direct line manager

The most likely to rely on communications via email

When looking for a new job, career development matters more to them than to the other groups

The most likely to have provided feedback through a union

The most likely to prefer interactive and face-to-face communications

The most likely to want their CEO to give feedback on employees' ideas and suggestions

The most likely to want their manager to spend more quality time with their team

They describe communications as boring, impersonal, scripted, unclear and uninspired

They describe communications as accessible, clear, informative, trustworthy and useful

Bigger fans of newsletters and intranets than any other group

Managers in this group are the most likely to want communications training

Managers in this group want more and clearer information on what to communicate to their team

Managers in this group say they need to prioritise communication with their team more

Most say employer's communication feels positive

The positive impact of internal communications shines through in the language people use to describe it.

UK workers generally feel communications from their employers are positive – choosing words like 'useful', 'clear', 'informative' and 'accessible' to describe their current state.

The balance between positive and negative words shifts notably when there is a dedicated internal communications team compared to when there isn't.

When communication is bad, it's very bad

Those who rated communications from their employer poorly chose words including 'uninspired', 'uninformative' and 'unclear'.

Size matters, too

72% of words chosen to describe communications by UK workers in organisations of 500–999 employees are positive. This positivity drops as organisation size increases – down to 65% in organisations with 1,000–9,000 employees and 60% in large organisations of 10,000+ employees, 6pts below the UK average.



Claudi Schneider
Head of Video, Sequel Group

It's encouraging to know that audiences are positive about the internal communication they are receiving at work – but we need to be mindful of the misses.

Particularly in larger organisations where the diversity of a work force will be greatest, it's important that the tone of voice, messaging and content formats are right, to cut through noise and make the most impact – delivered via a mix of channels to enable audiences to connect in a way that works best for them.

Employees describe communications more positively than negatively

Please choose up to five words to describe how communication from your employer currently feels to you

34%

Negative words

66%

Positive words



In organisations with a dedicated IC team



In organisations without a dedicated IC team



Scripted, formal and boring communications are bad – uninspired, uninformative and unclear communications are terrible



By those who rate communications as very poor

28% Uninspired

26% Unclear

26% Uninformative

22% Uninteresting

22% Meaningless

By those who rate communications neutrally

17% Scripted

17% Formal

15% Boring

15% Impersonal

14% Uninspired

By those who rate communications as excellent

24% Useful

19% Clear

18% Accessible

18% Informative

18% Trustworthy

Speak up

What the UK workforce
wants to hear about



What's on the agenda?

People are most interested in hearing about pay and benefits – but strategy and development communications are in the mix too.

In the context of the global polycrisis, there's a desire for organisations to explain how they're going to navigate an uncertain world. Closer to home, UK workers are concerned about pay and benefits, 44% say there's 'too little' communication on the subject.

Pay close attention to engagement-linked topics

Too little information can mean a big problem, as a lack of communication really affects engagement. Our analysis found two important topics in need of a lot more volume when planning your content: strategy and direction, and development.

People also want to hear more on several HR-related themes, including guidance to help them do their jobs and – unsurprisingly, given the global context – wellbeing information.

Three polarising topics

It's worth being mindful of the trickier areas. Equal proportions of UK workers say they receive too much or too little information about the organisation's purpose and mission, diversity and inclusion, and the organisation's values and culture.



Susanna Holten

Senior Consultant,
Ipsos Karian & Box

We now have clear evidence that certain topics are more important to focus on – because if there's too little information about them, engagement levels drop.

I'd strongly urge any internal communication function out there to do a temperature check on how employees within their organisation feel about communication around the strategy and direction, as well as career and personal development opportunities. The negative impact is big if we don't get this right.

What employees want to hear more (or less) about

Employees fed back on whether they receive too little, too much or the right amount on each topic.

Key: ⚠ Indicates high negative impact on engagement when too little information is received

		Too much	Right	Too little	Net demand for more of each topic*
Dial up a lot	Pay and benefits	13%	43%	44%	⬆ 31
	My organisation's strategy and direction	11%	56%	33%	⚠ ⬆ 21
	Career and personal development opportunities	15%	47%	38%	⚠ ⬆ 23
Dial up a little	Guidance to help me do my job	15%	52%	33%	⚠ ⬆ 17
	My organisation's challenges	18%	47%	35%	⬆ 17
	How my organisation is supporting communities	16%	54%	31%	⬆ 15
	Sustainability and our climate strategy	18%	50%	32%	⬆ 14
	Ways of working / hybrid working	17%	53%	30%	⬆ 13
	New products, technology and services	17%	53%	30%	⬆ 13
	Wellbeing information	18%	52%	30%	⚠ ⬆ 12
	External context	21%	47%	32%	⬆ 11
Consider value of further comms	How my organisation is helping customers	19%	56%	25%	⬆ 6
	My organisation's achievements and successes	20%	54%	26%	⬆ 6
	People stories and news	21%	51%	27%	⬆ 6
Polarising topics	My organisation's purpose and mission	20%	58%	23%	⬆ 3
	Diversity and inclusion	23%	53%	24%	⬆ 1
	My organisation's values and culture	22%	58%	20%	⚠ ⬇ 2

*Net demand for info: % who receive too little - % who receive too much.

NB: % do not appear to add to 100% due to rounding.

We need to be clear about strategy

Just over half of UK workers say their organisation communicates clearly.

Although a small majority of employees are positive about the clarity of the communications they receive, there's still plenty to do.

Around half of UK workers experience clear communications on organisational goals, business priorities and performance – between 55%–57%.

This matters, because engagement is higher when communications are clear – UK workers who are positive on all three questions report average engagement of 79%, while those who are neutral or negative on all three scores sit at 25%.

The benefits of clarity don't stop at engagement.

Clarity of communication also increases people's confidence that their organisation's strategy is the right one. This in turn is one of the biggest drivers of whether people recommend their employer to others as a great place to work (see page 17). In a time when many organisations are struggling to find and attract talent, that kind of employee advocacy goes a long way.



Ghassan Karian

Chief Executive,
Ipsos Karian and Box

The relationship between engagement, clarity and confidence shows up in many ways.

For many publicly-listed companies we work with, confidence in the future and trust in senior leaders often mirror share price fluctuations – with engagement following the same trend.

Further to go to make communications clear for UK workers

Key: ■ Positive ■ Neutral ■ Negative

My employer has clearly communicated our organisation's goals for the coming year (for example, financial and customer targets, etc.)



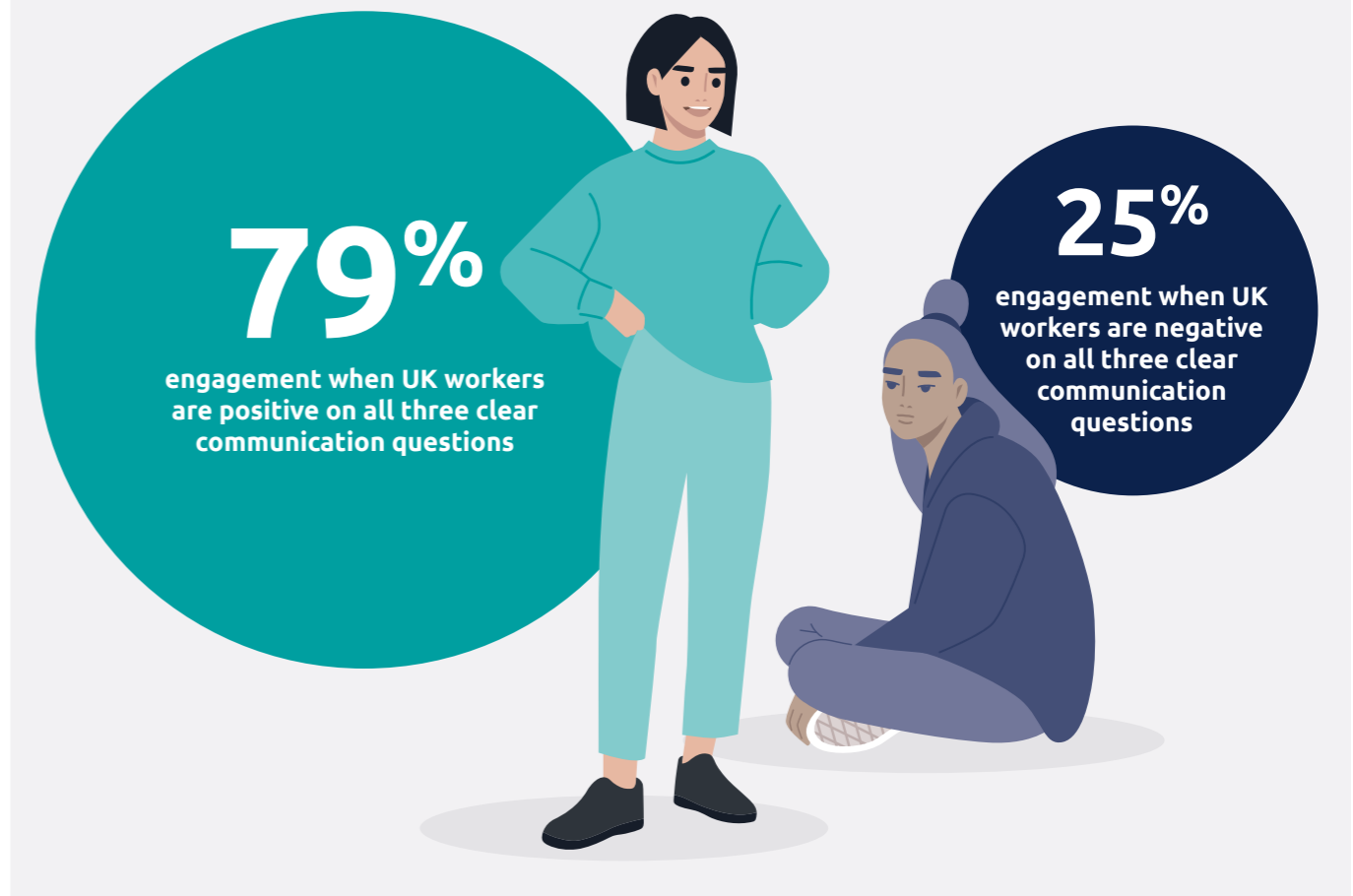
Communications about our organisation's business priorities are clear and easy to understand



My employer has clearly communicated how our organisation is performing



Engagement is higher when communications are clear



NB: % do not appear to add to 100% due to rounding.

The (slight) strategy paradox

People believe their organisation's strategy is the right one for success, but they're less likely to say their employer has been clear on what that strategy is.

The margin between scores is slight, but it still leaves us wondering: how can employees believe in a strategy that hasn't been clearly communicated? There may be a risk this is due to selective interpretations rather than the facts.

The divide is in the details

Once again, the scores show a divide by seniority. Positivity on both strategy metrics increases with rank, highlighting potential issues around cascading of essential news throughout an organisation.

The paradox is also more pronounced at the top.

Senior leaders have greater belief in the strategy (likely because they are closer to it) but proportionally much lower clarity. Perhaps these lower clarity scores indicate that senior leaders do not think their organisation does a good enough job of communicating strategy and priorities to the wider workforce.

Team leader scores sit very close to the UK average, while those who work in a team but aren't leaders report below-average positivity on both strategy metrics. This provides a key action point, as for team leaders to engage their teams around strategy, they need to have a clear understanding of it themselves.



Suzanne Peck
President, Institute of Internal Communication

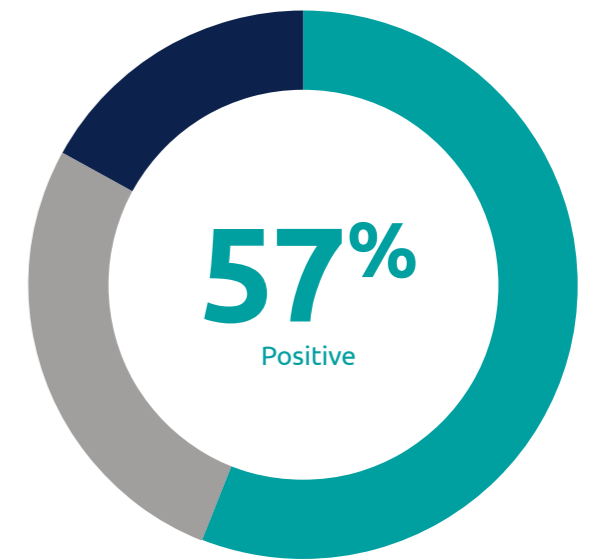
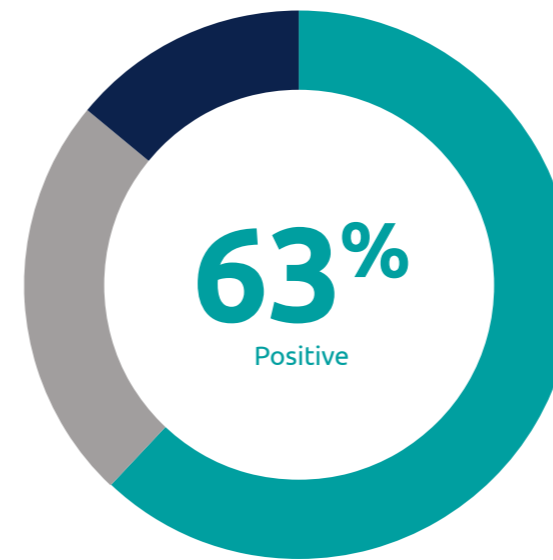
Narrowing the gap between employees 'understanding' and 'believing in' strategic communications is such an opportunity for IC colleagues to make a difference within organisations.

Convincing, coaching and cajoling leadership to be seen and heard more often on strategy contributes to that higher level of belief.

Belief in the organisation's strategy drives overall engagement

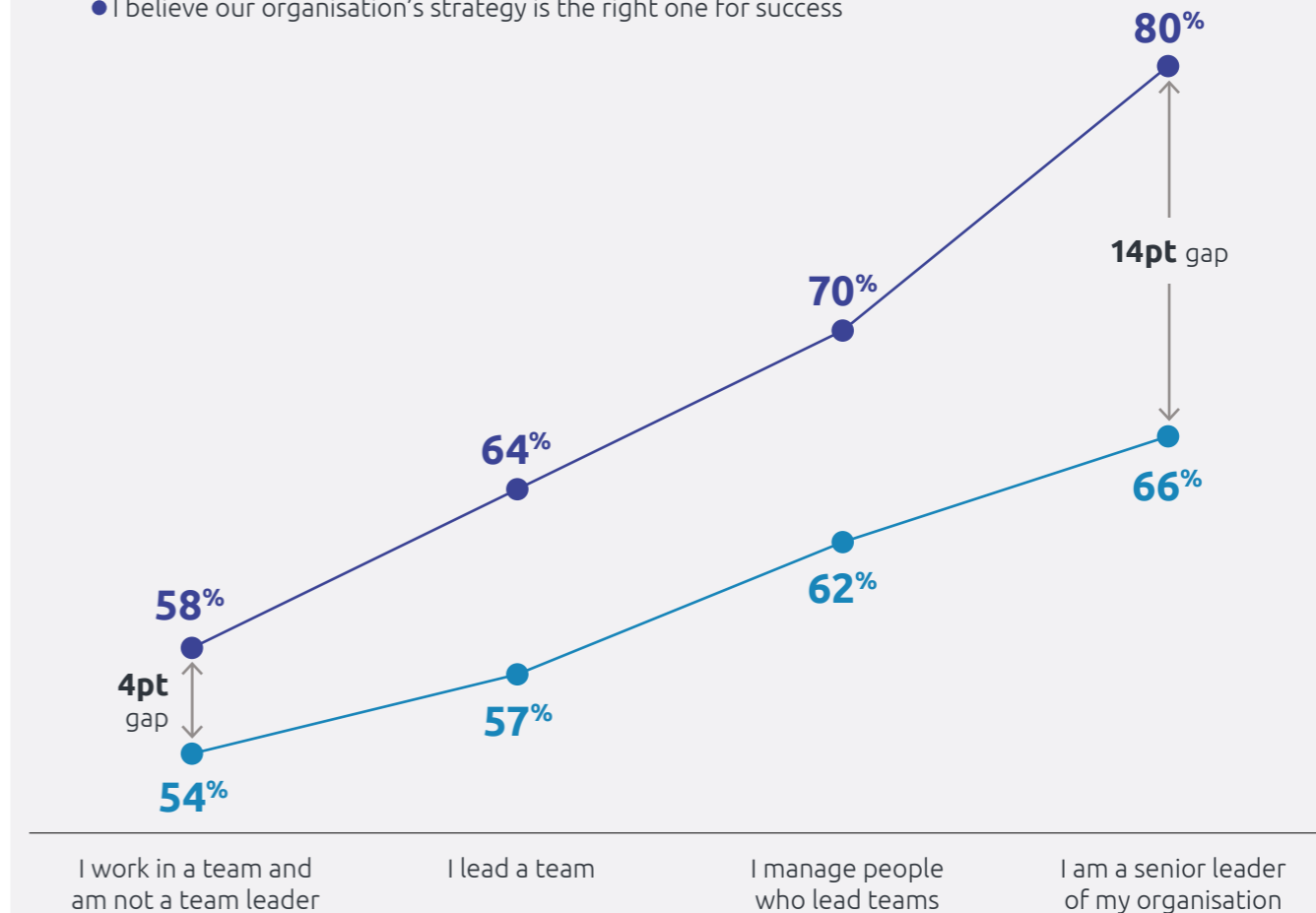
I believe our organisation's strategy is the right one for success

My employer has been clear on the organisation's strategy and business priorities



There is a gap between understanding of and belief in organisational values among more senior managers

Key: ● My employer has been clear on the organisation's strategy and business priorities
● I believe our organisation's strategy is the right one for success



One in four UK workers neither understand nor believe in employer's strategy

We need to up our game around strategy communication. Just 45% of UK workers are both clear on their organisation's strategy and believe it's the right one for them.

There's no 'one size fits all' solution – the challenges differ depending on the type of organisation you work for and the sector you work in.

Our analysis highlights four populations, or segments, within the UK workforce. Each has a different ratio of clarity and belief in their organisation's strategy, and each requires a different communication approach.

High clarity / low belief Bystanders

➔ **Action for internal communication:** Belief in the strategy often comes from understanding 'what's in it for me' and proof that the strategy is working. Focus on broadcasting progress updates against tangible goals, and encourage team conversations where people can explore the strategy with the people they work with every day.

High clarity / high belief Ambassadors

➔ **Action for internal communication:** Keep doing what you are doing – there won't be many 'neutrals' in this group to convert. The main goal is to shift people from other groups into this segment.

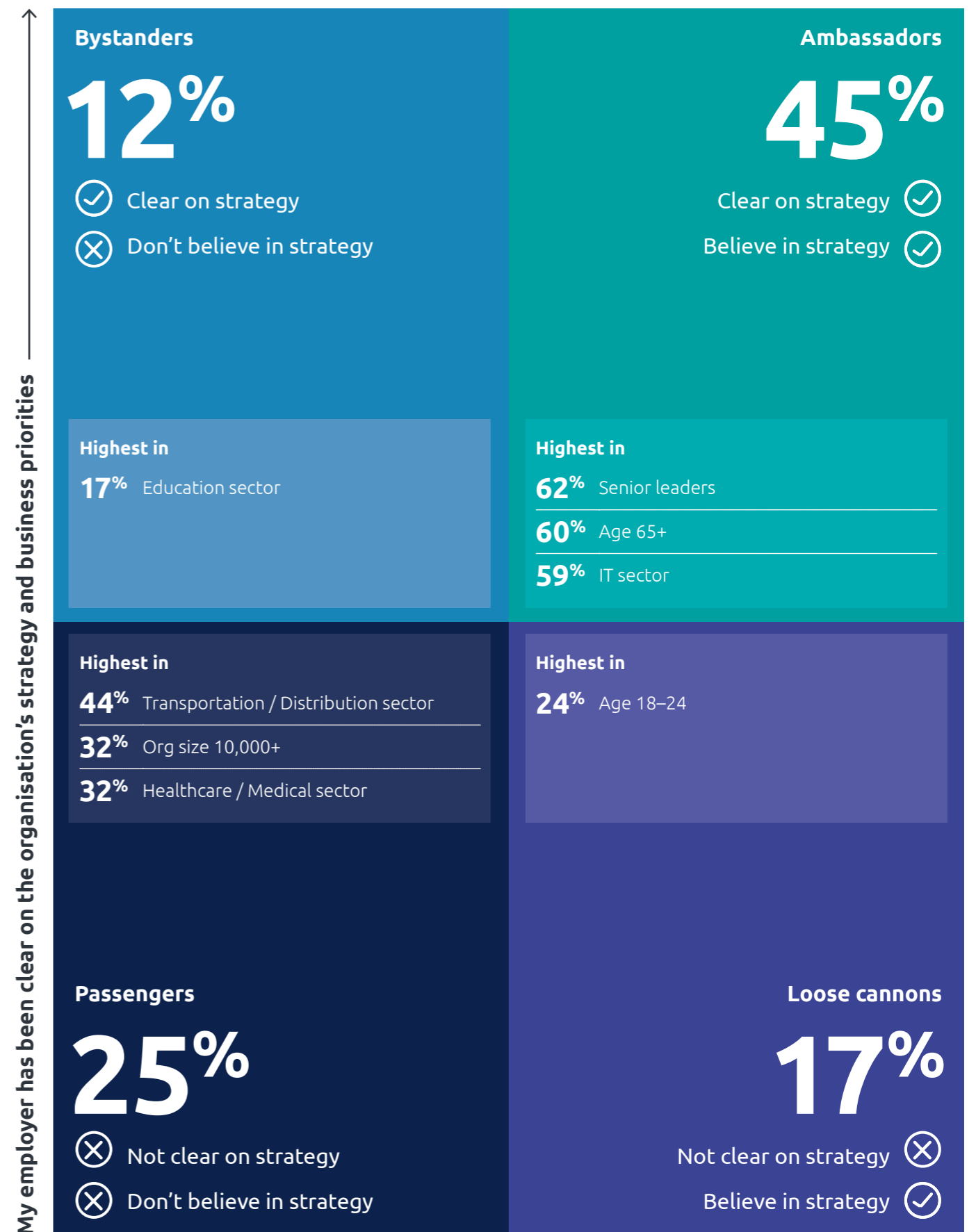
Low clarity / low belief Passengers

➔ **Action for internal communication:** This group will be the hardest to shift. Try and educate them on what the strategy is first and foremost – both in the broad sense and by putting tangible activities in each area of your organisation into that broader context.

Low clarity / high belief Loose cannons

➔ **Action for internal communication:** This group will also require some targeted education. They should be the easiest to shift into ambassadors, as they already believe you're doing the right thing – just make sure they understand what that means!

The strategy ambassador matrix



I believe our organisation's strategy is the right one for success →

NB: % do not appear to add to 100% due to rounding

Loud and clear

How to reach the UK workforce



You have 15 minutes (or less!)

A quarter of UK workers spend 'hardly any time' reading or viewing news and updates from their employer.

Those who do dedicate some time in their day to engaging with internal communications typically spend less than 30 minutes on it.

This is a real challenge – especially when there's so much that organisations need to get out there.

So, when do we have their attention?

Around two in three UK workers say they prefer to see, hear or read communications from their employer as part of their team meetings. This means that they're probably not headed to your intranet or spending time reading newsletters outside of these meetings.

Spending time on internal communication in between meetings is the second most popular option, though, so this group will catch up on the things you send out.

What does bouncing between meetings do to attention spans and focus? It's well worth considering how likely this group is to remember what they've just seen.

When it comes to those who read communication before work, while travelling to work, generally outside working hours and when they wake up, this group will require content on-demand if you really want to reach them – so it's worth considering how you can be inclusive of this group when looking at your content plan.



Suzanne Peck

President, Institute of Internal Communication

15 minutes or less each day to engage employees!

Yes, it's a challenge but should help us to support our organisations in focusing on only the most relevant and most useful employee communications.

Only precious minutes each day to reach and engage employees

Thinking about most work days, how much time do you spend reading / viewing news and updates from your employer about the organisation and its priorities?



25%
None – hardly any time

7%
30–60 minutes a day

43%
Up to 15 minutes a day

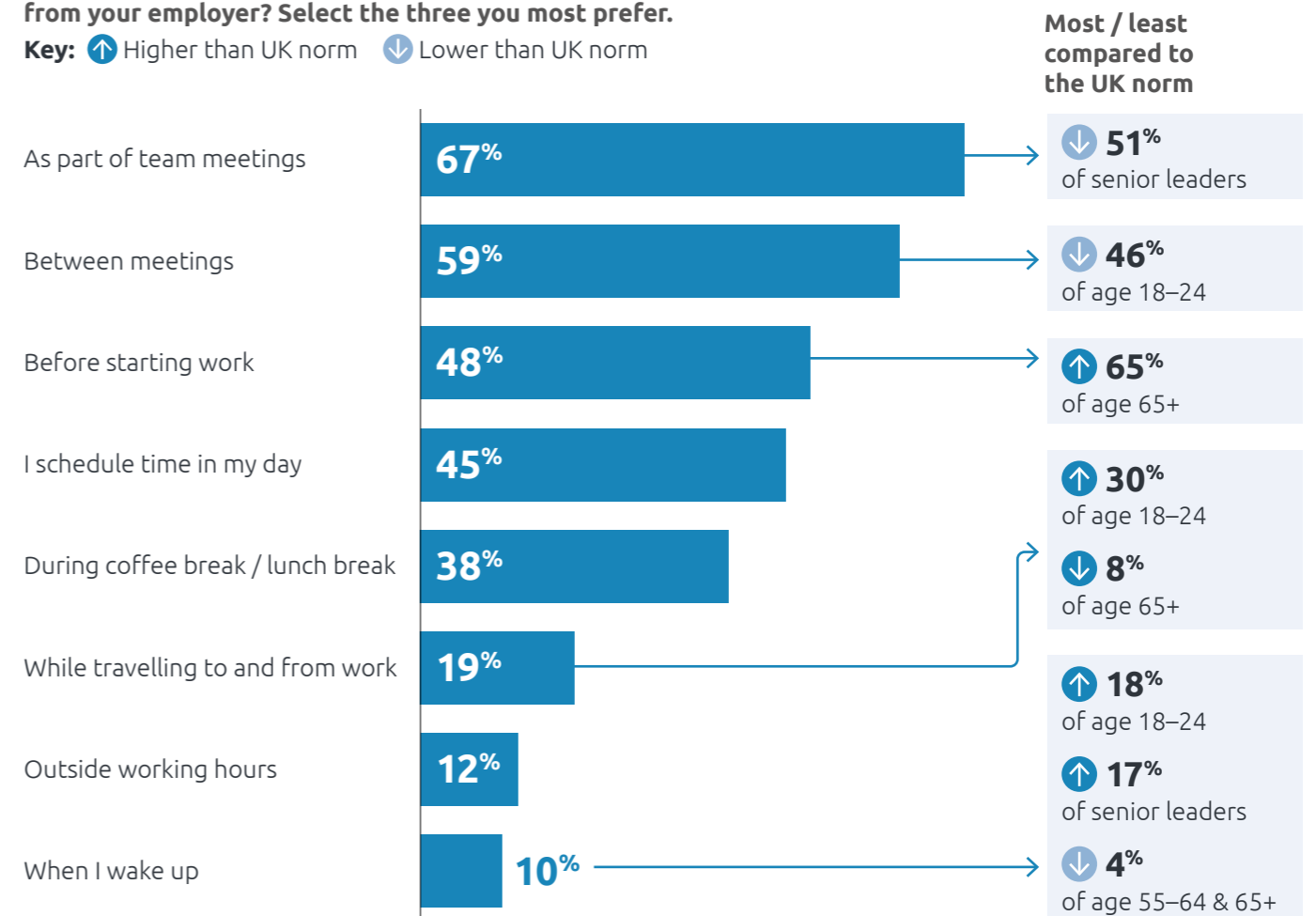
2%
Over an hour a day

23%
15–30 minutes a day

The majority of respondents view news during or between meetings

When, during your day, do you prefer to hear, see or read communications from your employer? Select the three you most prefer.

Key: ↑ Higher than UK norm ↓ Lower than UK norm



Back to basics: most people prefer to read communications

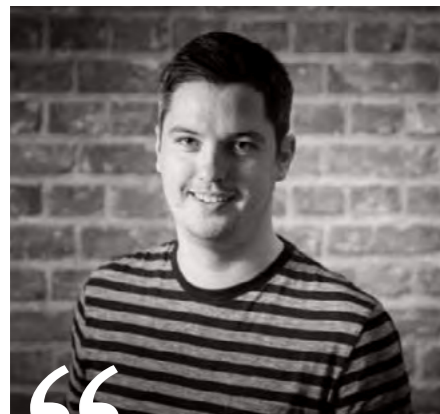
Innovation has its place, but sometimes people like things to be old school.

The data is conclusive – more traditional routes like reading written information or talking about it during team conversations come out as the most preferred ways to access information about organisational priorities and plans.

Hearing and seeing it both come in at a similar level of preference for UK workers overall – but there’s slightly more appetite for both formats across managers of people who lead teams and workers aged 18–24.

How this changes as we see an increasing number of Gen Z in the workforce is yet to be seen. Head to page 42 to explore how you can future-proof your channel strategy.

In larger organisations (of 10,000 or more employees), far fewer employees prefer to see or hear information. This means the smaller the organisation, the more likely employees are to engage with podcasts, films and animation.



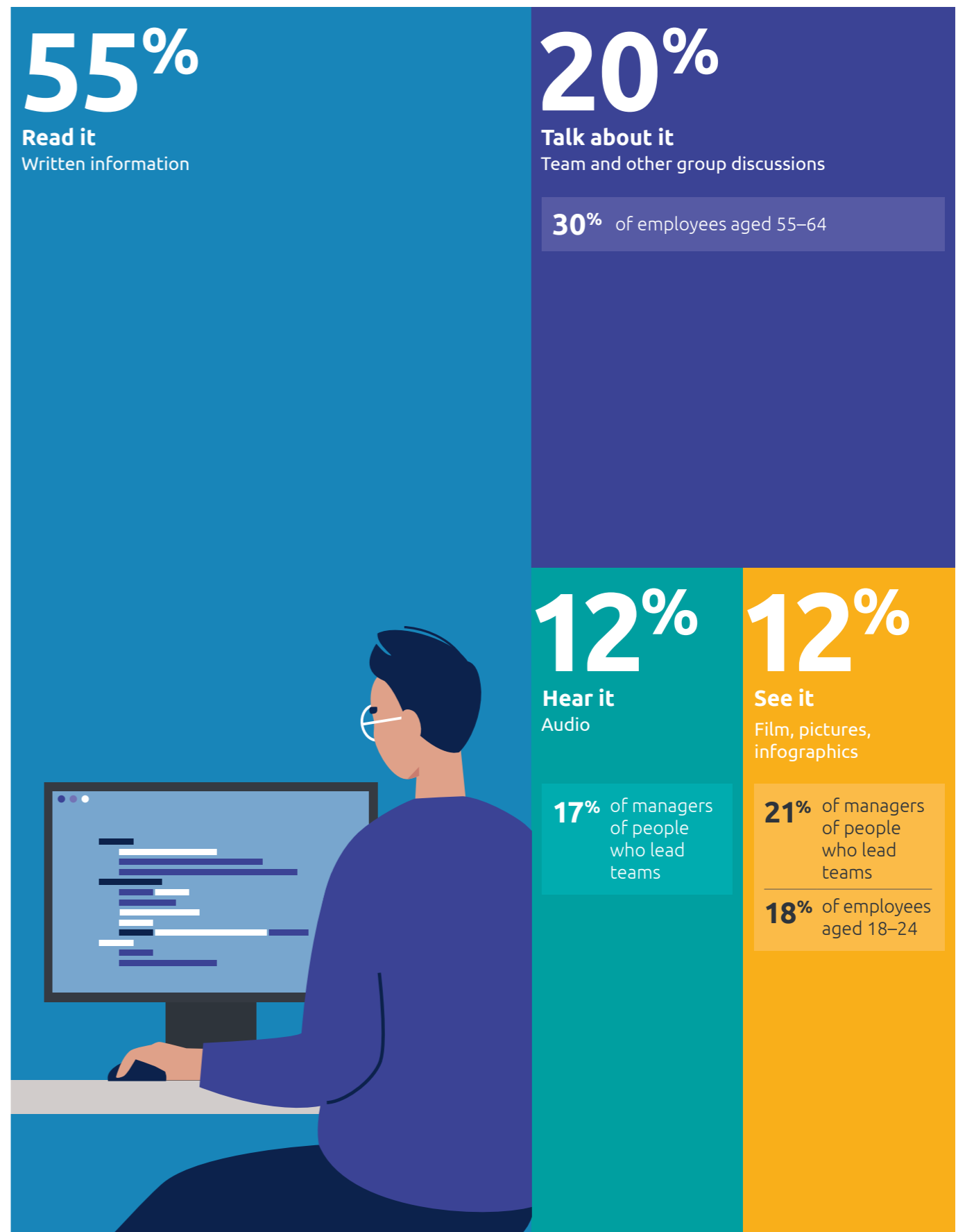
Will Fox
Internal Communications
Manager, Beamery

We live in a fast-paced world. We work in fast-paced workplaces.

We have 15 minutes to get the attention of colleagues so the simple written word is often most effective. The figures show that we still need to adapt to our audiences (online and offline), but regardless of the form, one principle remains paramount: to always convey messages in clear, impactful and accessible ways.

Over 50% of respondents most prefer to read information

If you had a choice, what is your MAIN preference for how you access information about your employer’s priorities and plans?



Look to your leaders

Senior leader communications on strategy have a bigger impact on employee engagement.

There's a real divide in who UK workers hear business priorities from. 28% hear about them through 'traditional' channels that often get priority treatment, like email, video and intranet content.

There's another key route, though: similar proportions get their information through personal communications – mainly from direct managers (32%) or an organisation's senior leadership team (30%).

While an employee's manager is the most common source of communication on strategy, it results in the second-lowest levels of belief that the strategy is the right one. People who hear about strategy from their organisation's CEO have much higher levels of belief. This is a big challenge for the largest organisations, where workers hear less frequently from their CEO.

There are two possible approaches to solving this challenge.

One is simply to improve the visibility of CEOs and those closest to the top who can talk about the strategy with clarity and passion. How they can best communicate is explored more on pages 46 and 47.

The second solution is to build the confidence, capability and capacity of line managers to communicate with their teams. We know this is something line managers are asking for (see page 56).

The highest levels of understanding and engagement happen when direct managers and senior leaders both play a role in communicating strategy and do it effectively.



In an increasingly complex world, clarity and alignment of communication are crucial.

It's vital that all stakeholders understand what's going on both internally and externally, and also to share a common understanding of their context, situation, purpose and vision. Creating alignment delivers strategic value and is the new work of the internal communicator.

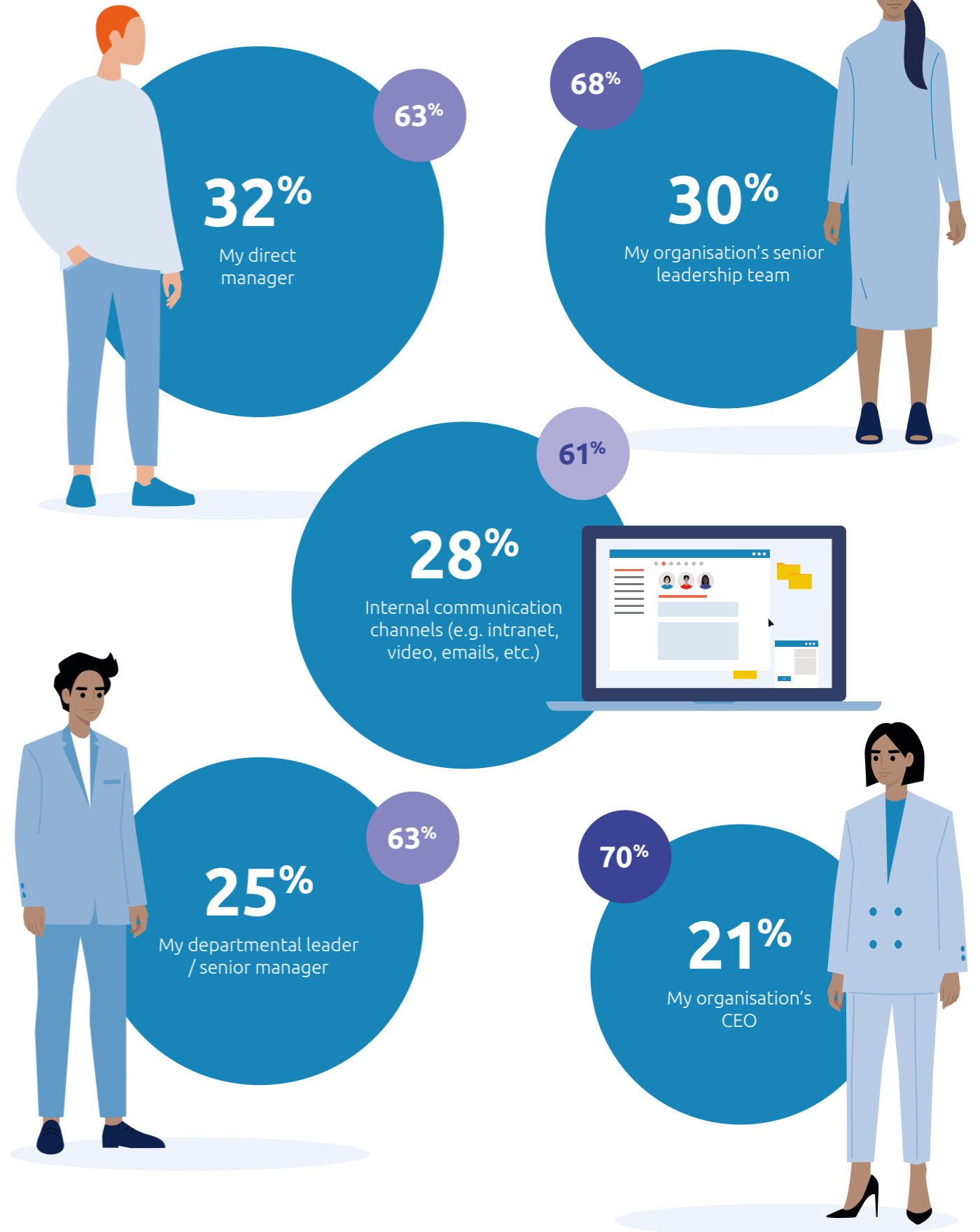
“Jennifer Sproul

Chief Executive, Institute of Internal Communication

Direct managers are the most common source of key information

Who do you most commonly receive communications about your employer's business priorities from (including organisation's strategy, plans, changes, etc.)?

Key: ●●● I believe our organisation's strategy is the right one for success.



Email remains the most relied-upon and preferred internal channel

It's all about the type and the talk: emails and 1-2-1s with line managers still come out on top as the most popular communication channels.

59% of the UK workforce rely on emails to receive company news and updates, broadly mirroring channel preference.

It is unsurprising organisations still rely heavily on this route for communicating strategy and other news updates.

Email is functional, easy and reliable to get to people in office-based environments.

Where organisations perceive a weakness in manager communications and 'cascade' briefings / team discussion on organisational news, they may rely more heavily on broadcasting their news by email.

It is a 'push' behaviour that also suggests a fundamental lack of confidence in 'pull' channels like intranet / social channels.

Email is less heavily relied upon in workplaces where employees have limited, if any, online access. Retail, Manufacturing, and other operational sectors see far more news delivery reliant on team meetings and manager updates.

A large proportion of employees in these sectors provide relatively negative feedback on the communications they receive. Managers may be a communication channel that people in these sectors rely on – but it is one that is not working as well as it should.



Nicole Bearne
Founder,
The Comms Exchange

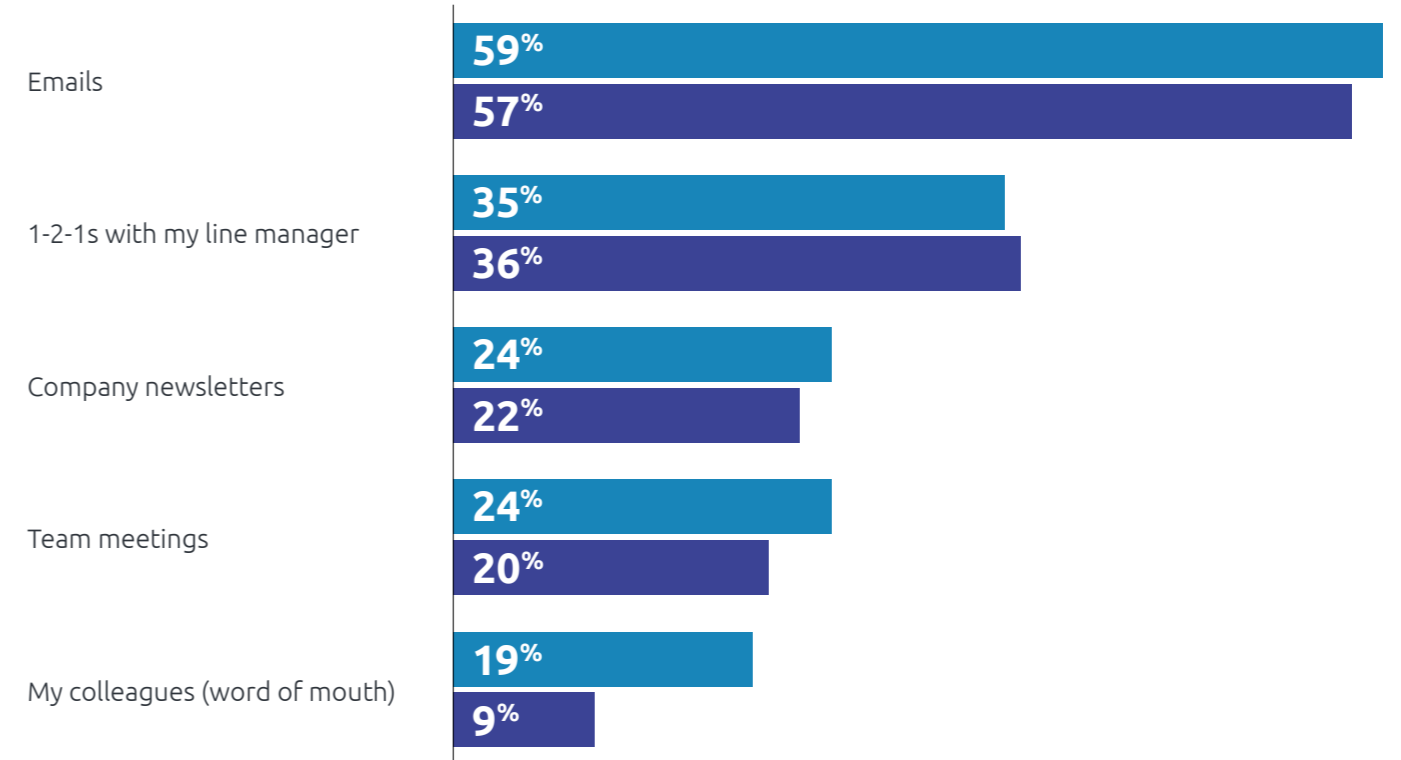
With an increasing number of channels available to internal communications teams, it's more important than ever to ensure that the mix is right for each organisation.

Data analysis will continue to provide insights into employee preferences and behaviours, and help determine which channels employees are most comfortable with. Our role will be to take an increasingly data-driven approach when making those key decisions on channel selection and optimisation.

Top 5 most relied-upon vs. preferred channels

Which of the following do you currently most rely on and prefer to receive general news and updates about or from your employer? (Top mentions)

Key: ■ Rely on ■ Prefer



Unrealised demand for manager 1-2-1s among young men and part-time employees, and demand from young men for company newsletters

Key: ● Reliance ● Preference



Men, 18-24

16% Reliance on 1-2-1s
23% Preference for 1-2-1s

← **7pt** gap →



Part-time employee

37% Reliance on 1-2-1s
42% Preference for 1-2-1s

← **5pt** gap →



Men, 18-24

11% Reliance on newsletters
20% Preference for newsletters

← **9pt** gap →

Two communication tribes

UK workers can be divided into two groups based on their channel preference: non-conformists and traditionalists.

Traditionalists rely on, well, traditional channels to receive updates from their employer – things like emails and line manager 1-2-1s.

Non-conformists use email, too, but they prefer external channels, such as Instagram and LinkedIn.

Non-conformists are more common in generations that are newer to the workforce and in smaller companies of 500–999 employees. But it's not all Zoomers and SMEs – senior leaders also use these channels to find and digest information about their organisation.

How do employees engage with communications?

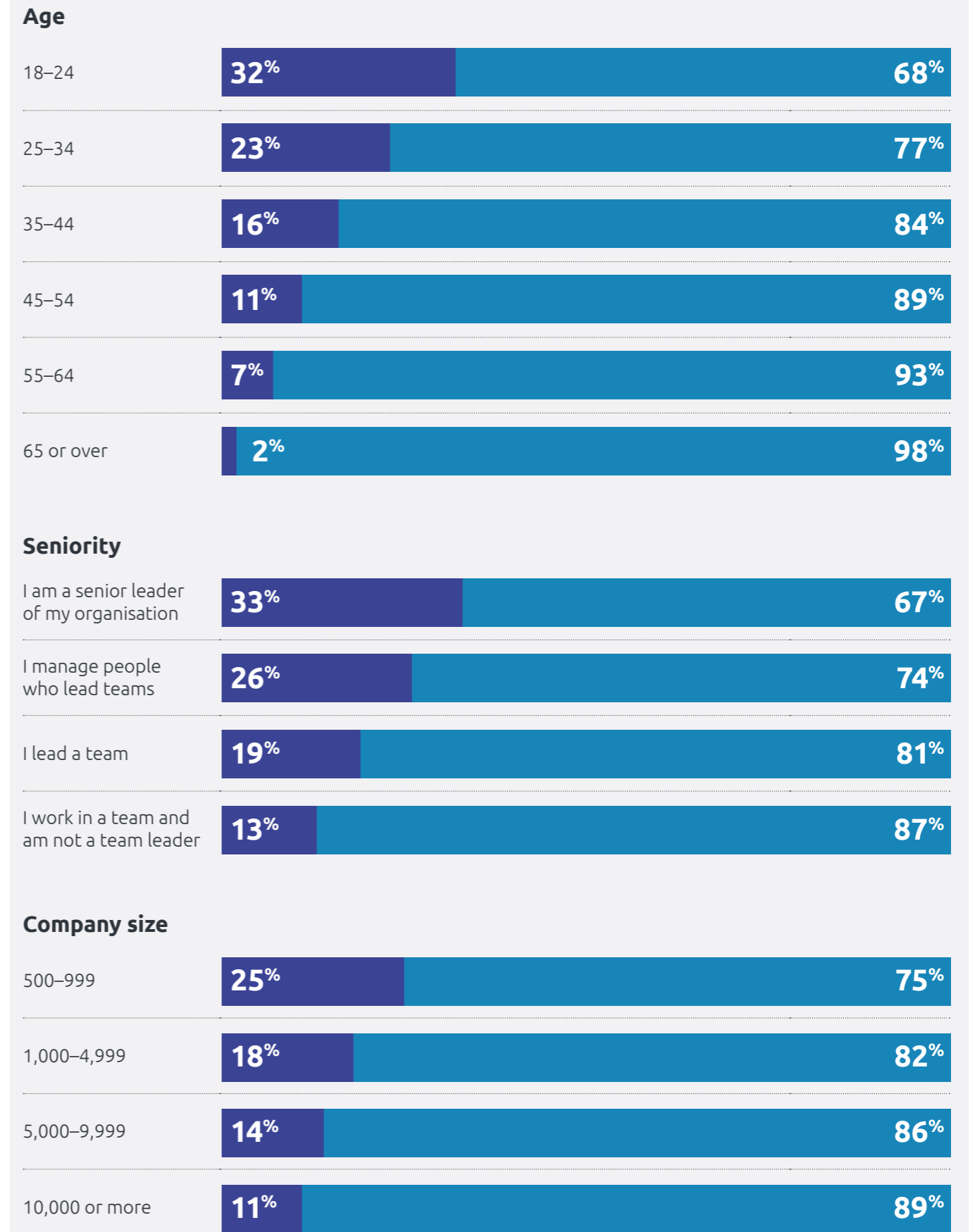


Which of the following do you currently most rely on to receive general news and updates about or from your employer?

Non-conformists	Traditionalists
27% Instagram	68% Emails
27% LinkedIn	43% 1-2-1s with my line manager
24% Emails	29% Team meetings
23% Enterprise Social Media Networks	26% Company newsletters
21% Employee magazines	21% My colleagues (word of mouth)
20% Digital screens	17% Microsoft Teams
18% SMS or WhatsApp	16% Intranet

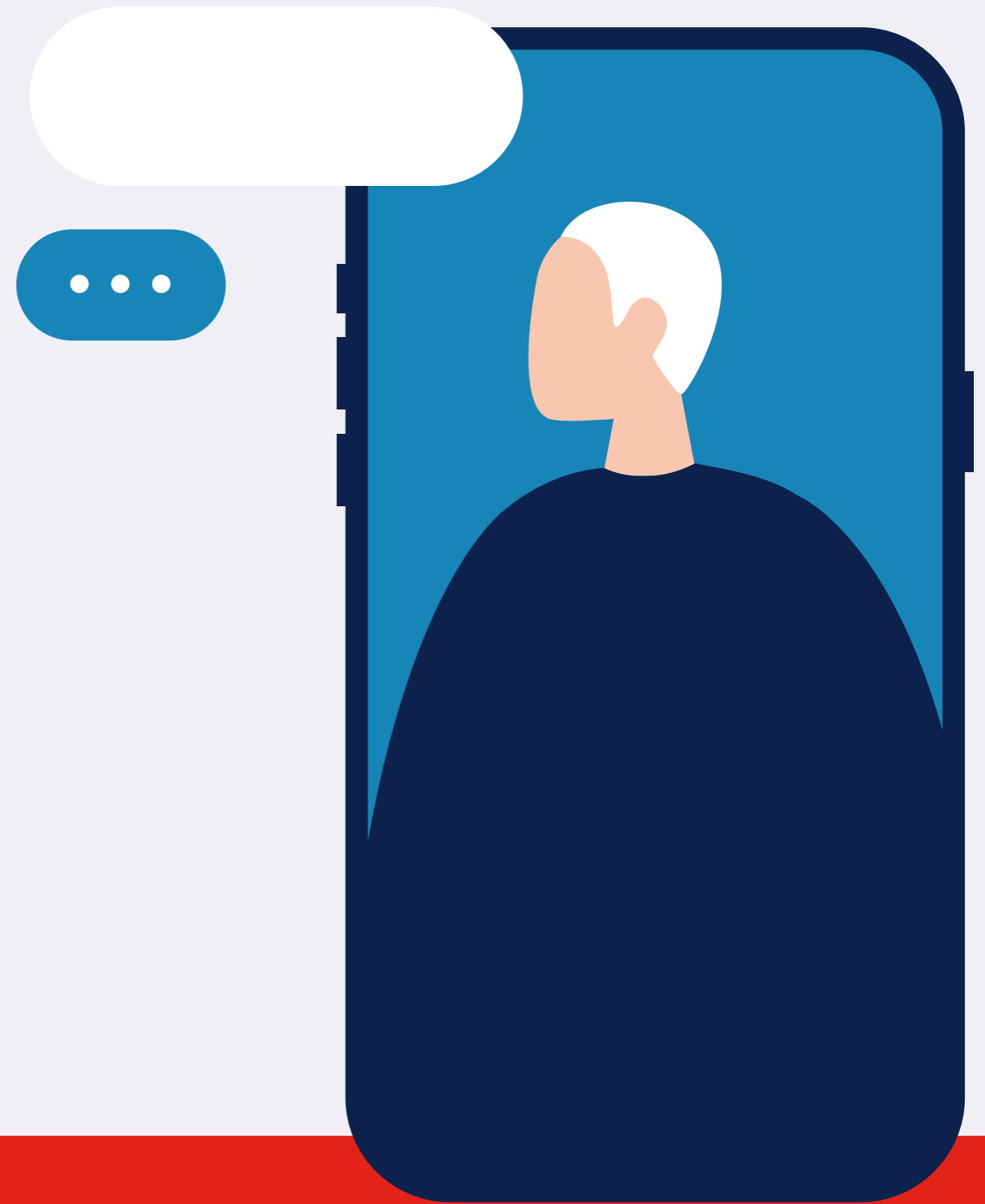
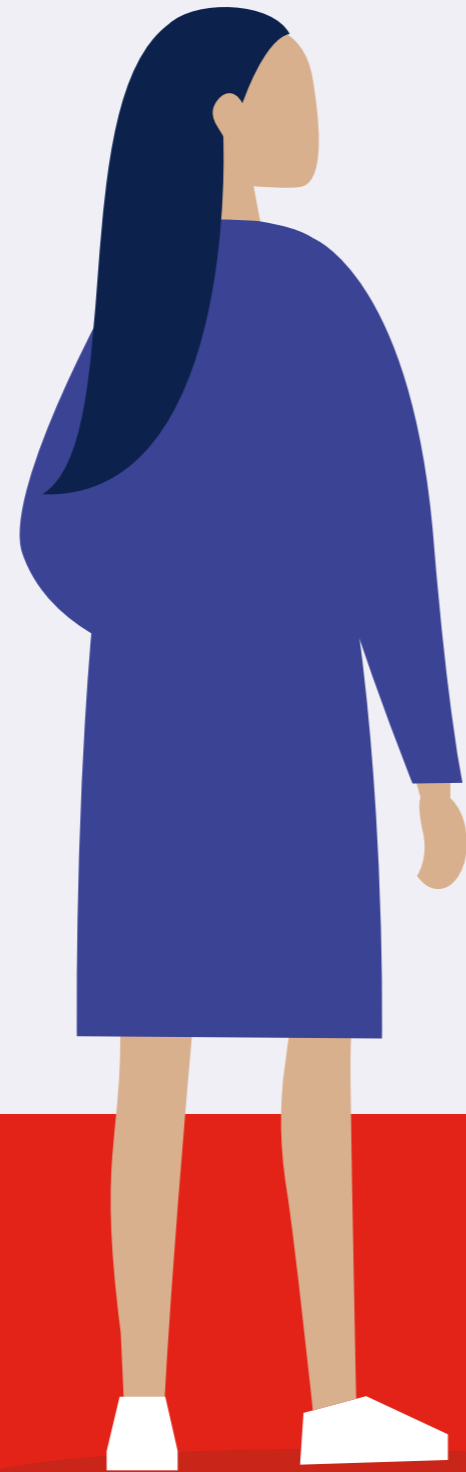
Where are the two communication tribes?

Key: ■ Non-conformists ■ Traditionalists



Tales from the top

How do people like to hear
from their leaders?



Senior leadership communications: horses for courses

When it comes to communications, UK workers make a distinction between CEOs and senior leaders – and they want to hear from them in different ways.

Almost half of UK workers prefer to see or hear from their departmental leader or senior manager through face-to-face interactions, such as briefings or town halls (possibly as a result of the pandemic).

Email is the most preferred channel for communications from both groups, especially CEOs. As outlined on pages 36 and 38, this is partly down to what employees know and are familiar with. While CEOs can get away with communicating via email, there is a much higher demand to see departmental leaders in a face-to-face and interactive setting. This is likely due to people having had more personal interactions with their local leaders. Research elsewhere shows proximity and familiarity foster greater confidence and comfort, making town halls led by departmental leaders preferable to those led by the CEO.

Virtual briefings hold more appeal for people aged 25–34. Interest in these channels falls among older audiences.

However, the trend by age is not as seismic as some might expect. The gaps between younger and older employees on the demand for virtual leader communications is not huge. This highlights that, irrespective of generation, some common ‘truths’ still apply on how employees want their leaders to communicate.



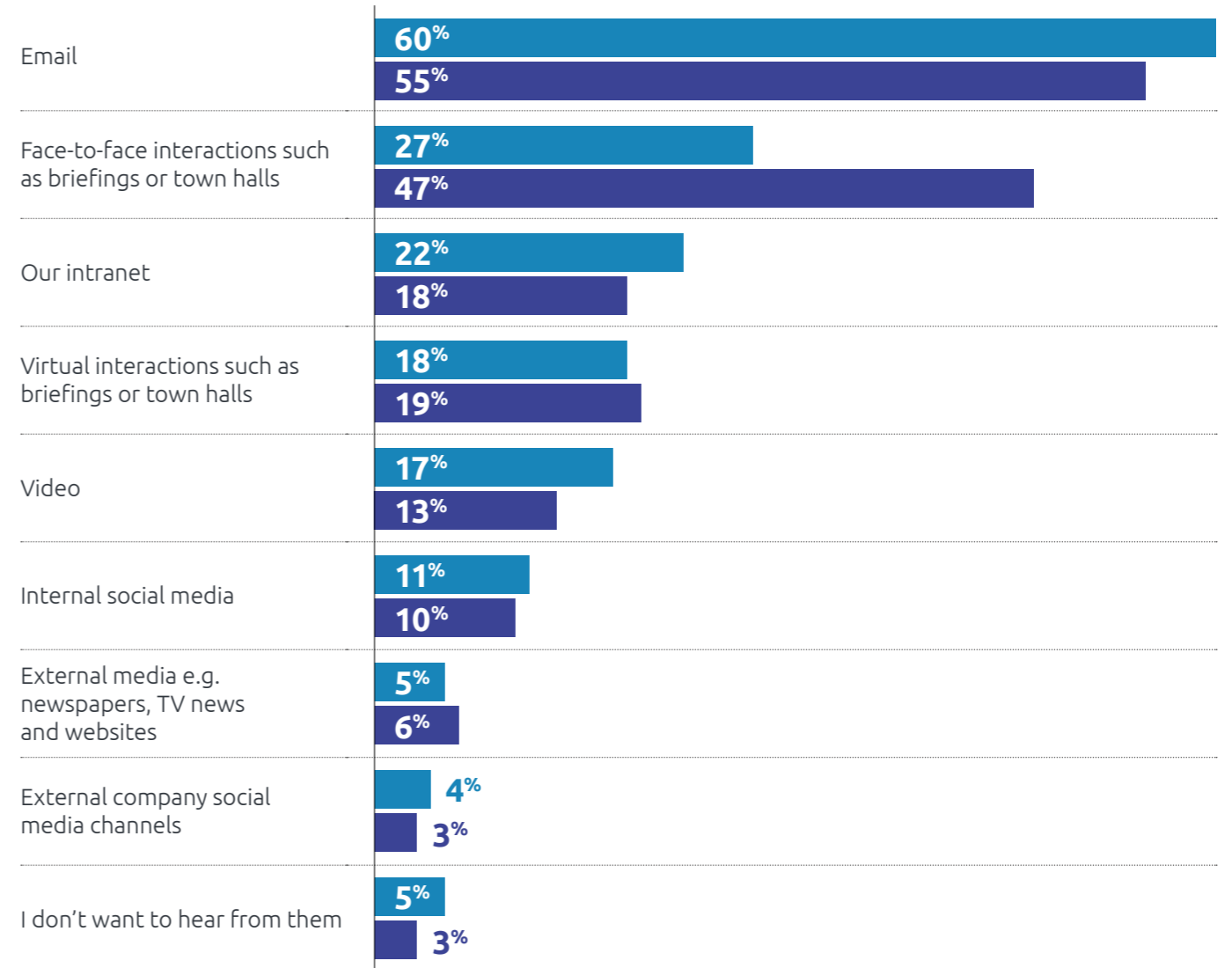
Rebecca Crosby
Innovation and Thought Leadership Director, Ipsos Karian & Box

Here’s our case to start bringing the broader leadership team into the communications mix: people want to hear from them directly!

It’s often debated how involved leadership should be – and sometimes leaders are reluctant to be involved. The data shows that there’s a clear need for more face-to-face interactions with departmental leaders or senior managers.

Employees want to receive information from senior leaders by email but also want to see departmental leaders in person

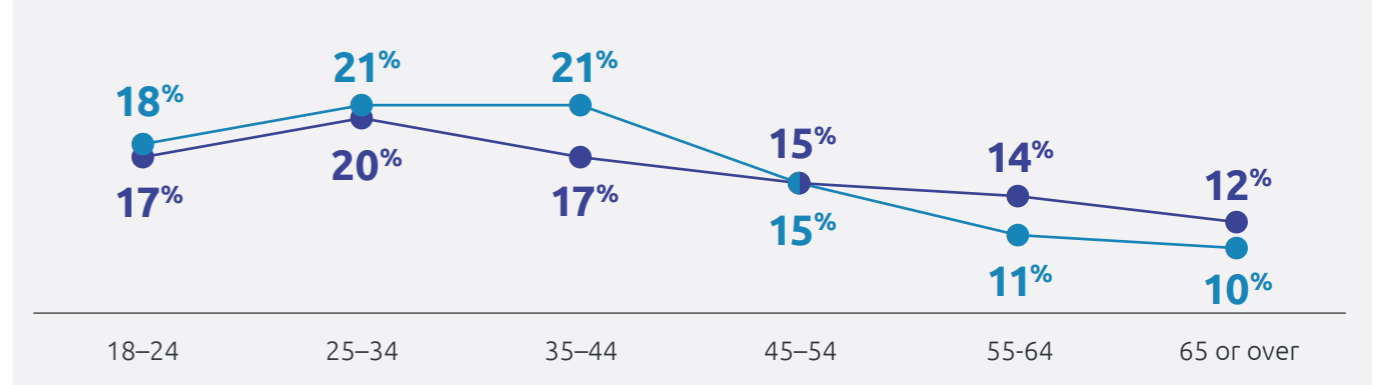
Key: ■ How do you prefer to see or hear from your organisation’s CEO?
■ How do you prefer to see or hear from your departmental leader / senior manager?



Younger employees, particularly those aged 25–34, are more interested in virtual briefings and videos from CEO

How do you prefer to see or hear from your organisation’s CEO?

Key: ● Virtual interactions such as briefings or town halls ● Video



Direct managers are the most trusted messengers

Proximity is important. People place greater trust in what they hear from their direct manager than from their CEO.

As the distance between CEO and employee increases, CEO trust declines while direct manager trust remains relatively consistent. The gap between trust in CEOs and direct managers is 7pts among smaller organisations of 500–999 employees and 17pts among larger organisations of 10,000+ employees.

This finding is unsurprising. Studies show the closer you are to someone, the more you trust them. Larger organisations can get around this by ensuring their CEO and other senior leaders are regularly visible to employees. Those that do will experience higher levels of trust in their leaders.

Dedicated communication teams make a difference

Trust in communications from a CEO is 8pts higher when organisations have an internal communications team. The same trend applies to direct manager communications, with trust jumping from 54% to 65% in the presence of an internal communications team.

Trust also sees a boost when internal communications teams do great work. Ratings rise above the UK average for both CEO and direct manager communications when people say internal communication from their employer is 'excellent'.

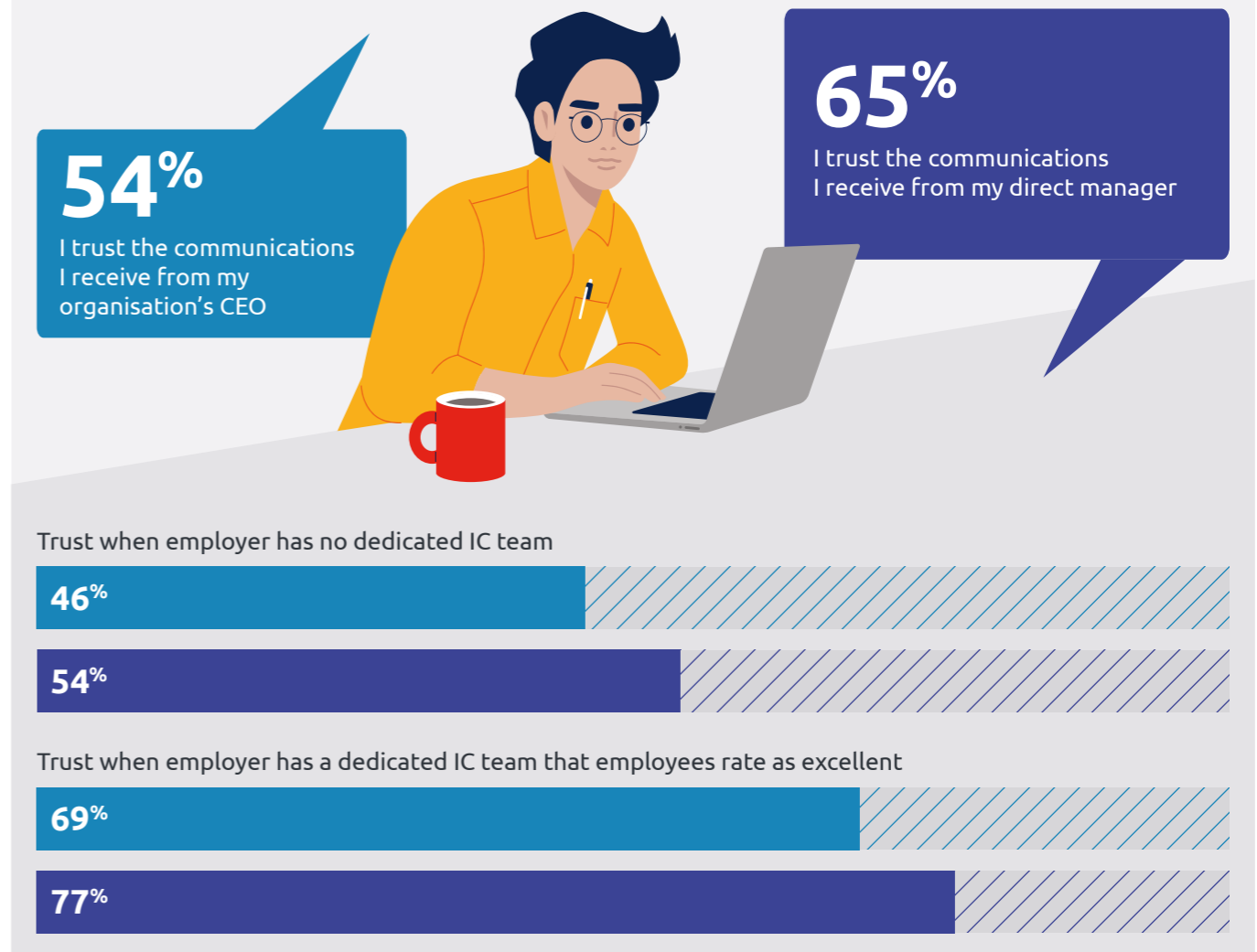


“
Claire Grundy
Director, Internal Communications & Engagement

It's human nature to trust people you know more than people you don't. High-performing organisations expect line managers to prioritise their role as communicator. Reinforcing this role is the most important thing we can do.

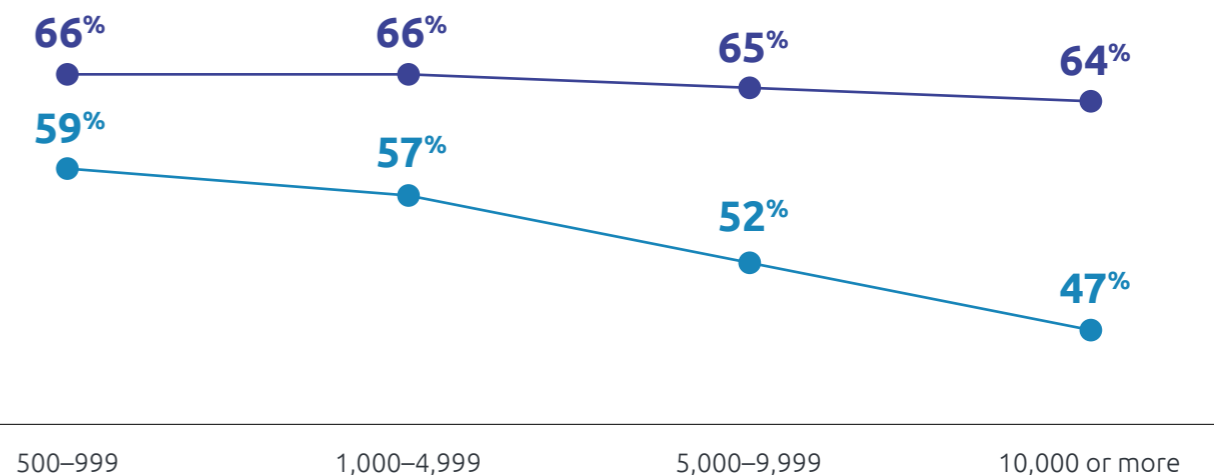
We are a large, dispersed organisation of over 40,00 people in locations all over Great Britain. Since many of our colleagues are in operational roles, reaching them with our internal communications is challenging. We're increasingly looking at what we can do to support and equip line managers to engage their teams rather than relying on formal communications channels to plug the gaps.

Greater trust for direct managers than CEOs



Direct manager trust consistent irrespective of organisational size, CEO trust declines

Key: ● I trust the communications I receive from my organisation's CEO
● I trust the communications I receive from my direct manager



Manager and team communication



We need to see our leaders

In general, UK workers don't need personal communication from their CEO (see preferences on page 47) – an email is fine.

But what does matter is how often people see or hear from them. This has a big impact on engagement.

If a CEO only communicates quarterly or every few months, engagement is likely to be 20pts lower than if they communicate with the business every few days. And with only around a third of employees hearing from their CEO weekly or more, there's a big opportunity for organisations to boost visibility.

This pattern is similar for both departmental leaders and direct managers.

That said, an email from the CEO every few days will likely get old quickly.

Organisations will need a strong content mix to avoid CEO communication becoming part of the corporate wallpaper when looking to increase the frequency of communication. Organisations with younger workforces (especially with a large population aged 25–34) should consider how they can supplement the emails with virtual briefings or videos from the CEO.



Laura Colantuono

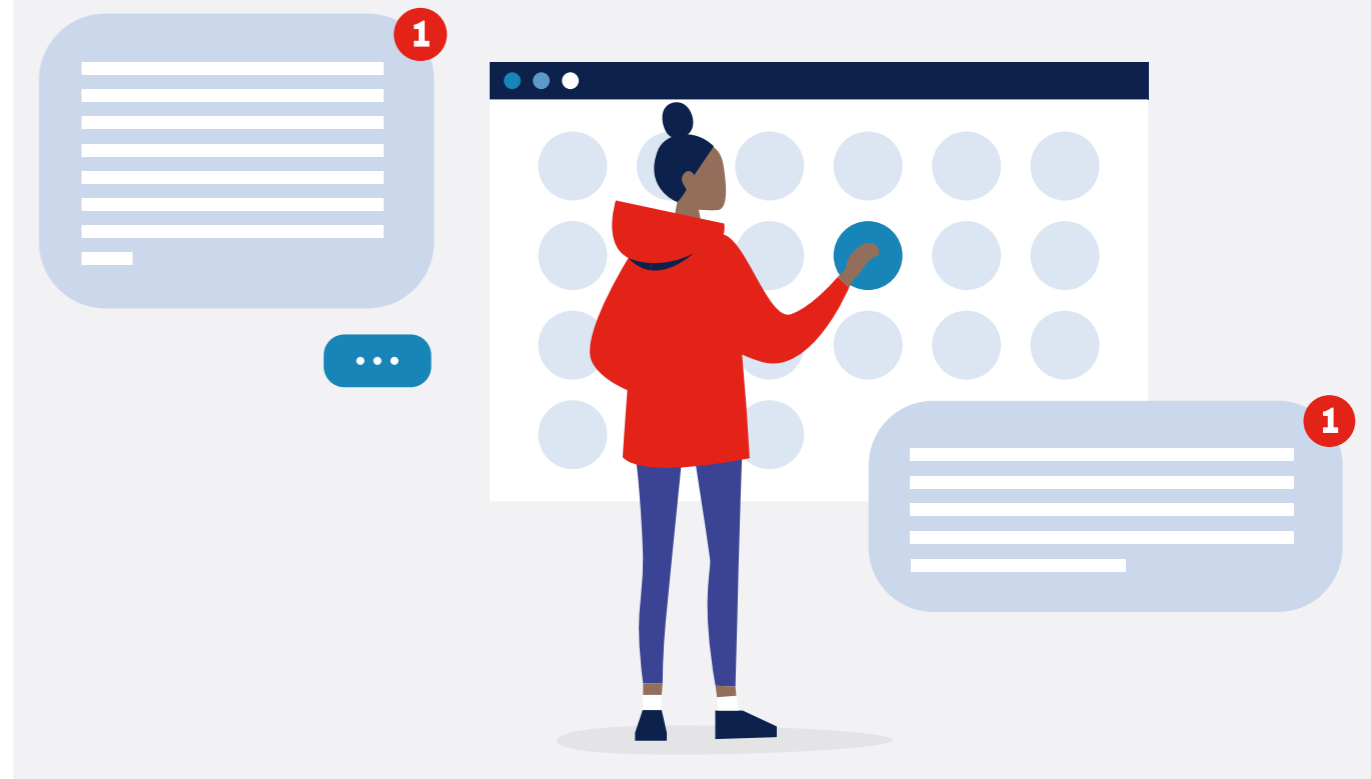
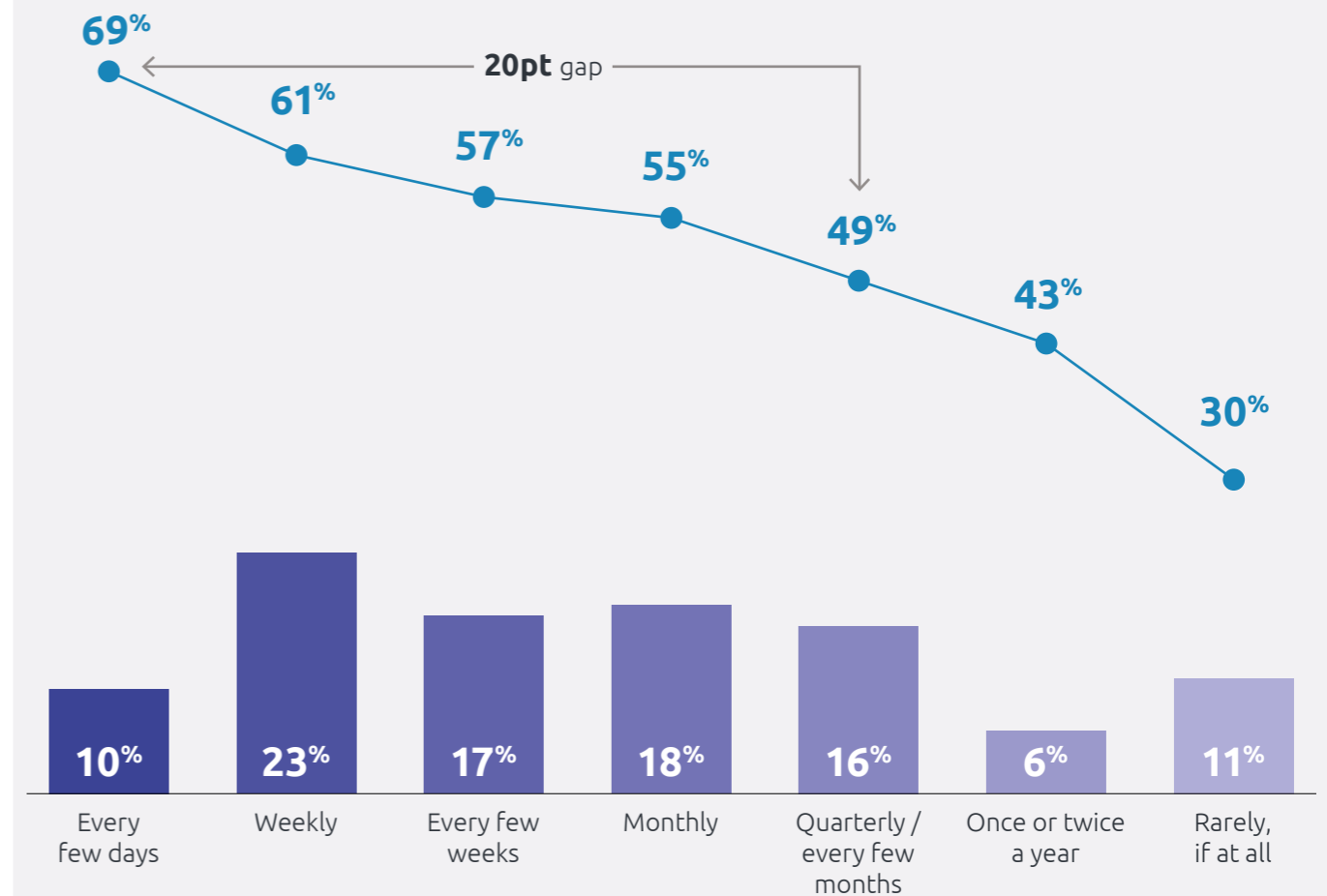
Group Head of Internal Communications at Fremantle

By being visible, leaders foster trust, cultivate a deep sense of belonging, and enable employees to understand the bigger picture. That's why it's crucial to view leadership visibility not as a mere checkbox activity, but as a key element of our engagement strategy.

This involves establishing a consistent rhythm of touchpoints through various channels (digital and face-to-face), ensuring that interactions remain engaging, authentic, and meaningful. By doing so, leaders can create an environment where employees feel valued, connected, and inspired to contribute their best

Engagement drops off when the CEO communicates less frequently

Key: ● Engagement ■ How often does your organisation's CEO communicate with employees around you?



Managers need to talk about team priorities and goals

Throughout this report, we see the value of great communication from direct managers. They're a trusted source of information – so what do employees want from them?

Performance updates sit at the heart of what employees want. UK workers want their manager to keep them informed about team priorities and goals above all else, swiftly followed by updates on how the wider organisation is performing.

Other things UK workers want from their managers are beyond the remit of internal communications teams – spending quality time with the team, providing wellbeing support and organising dedicated 1-2-1 meetings.

Internal communications teams should ensure there is information readily available – at the right time – to help managers better connect their teams to what matters to the organisation they work in and how they can help to achieve those goals.



Paul Diggins

Head of Internal Communications, Santander

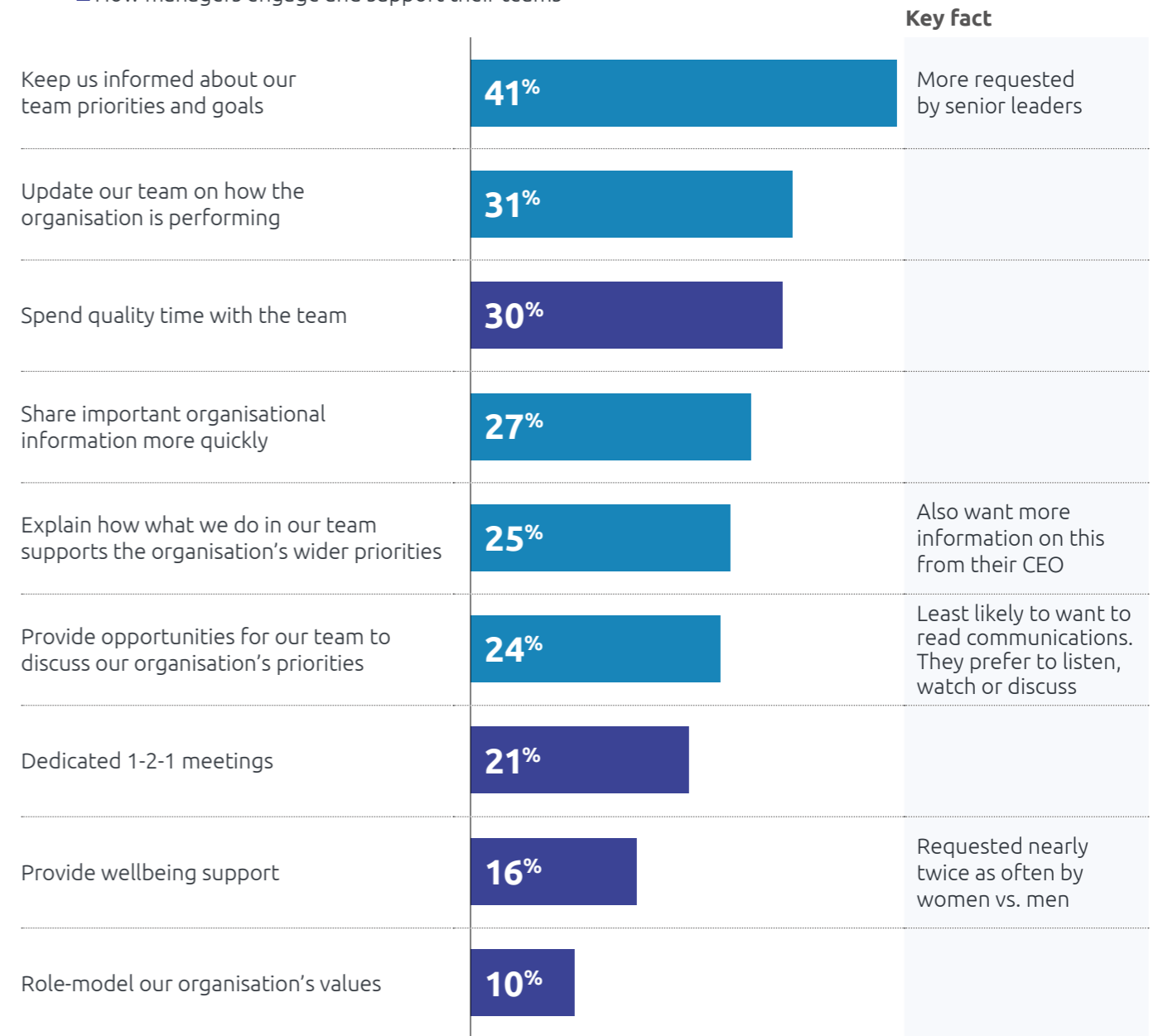
This research absolutely rings true, both with my experience here and in previous organisations.

The role the people manager plays, on a daily basis, in creating context, alignment, pride and belief in the work of their teams, and their connection to the business as a whole, can never be underestimated. For many employees, they represent 'the business', and it's incumbent on every business to equip them properly to undertake that role – giving them the content AND capabilities to have meaningful conversations with their people. Every conversation is unique to the individual.

Updates on priorities and performance key ask of managers

What do you want MORE of from your direct manager to help you be at your best in your job? (Please select up to three of the most important ones for you)

Key: ■ What managers communicate and how they communicate it
 ■ How managers engage and support their teams



One in three line managers don't feel equipped to lead team conversations

Team leaders are being asked to do a lot – especially in the communications space. But many of them don't feel equipped to have the conversations their organisations need them to have with their teams.

A lot of people who become team leaders get promoted into their roles because they are technically skilled at what they do. But being skilled within your field and being a confident, comfortable communicator are two very different things. Great communication also takes time, experience and training.

Senior leaders and those who manage people who lead teams feel far more equipped to lead conversations about what's happening across their organisation, perhaps because they're closer to decision-making, change management plans or the strategy for years ahead. Or they may just have more experience of doing it.

But team leaders need support. They need more information about what to communicate – and for this information to be clearer (see page 59).



Jennifer Sproul
Chief Executive, Institute of Internal Communication

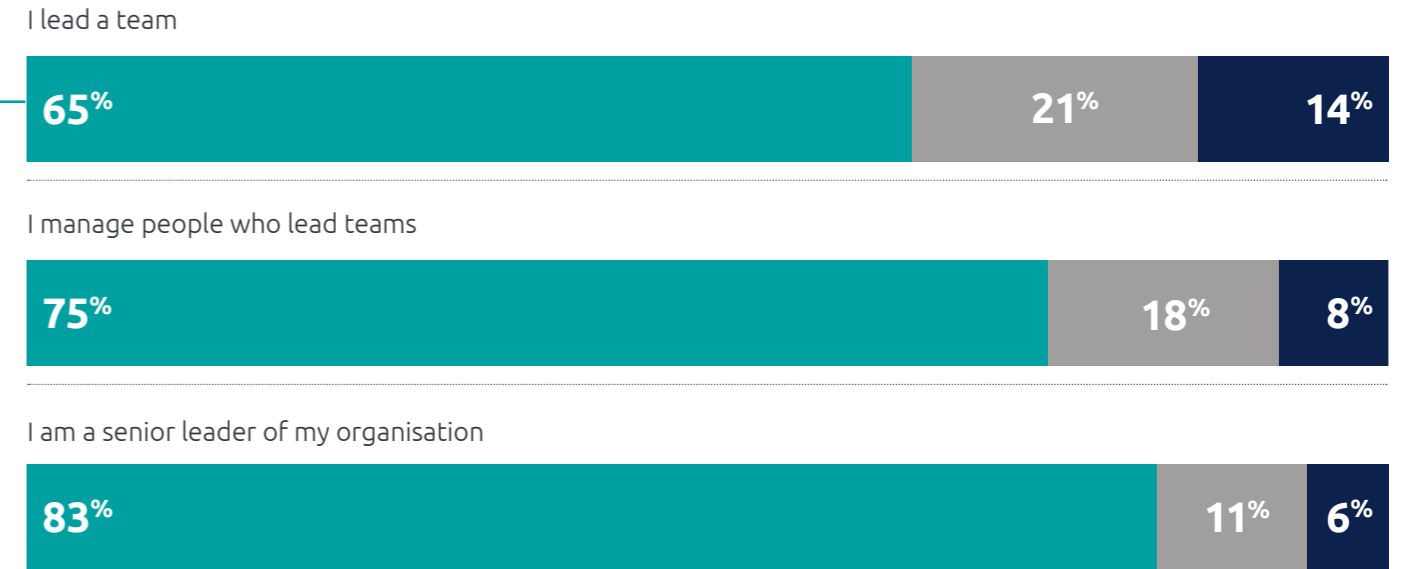
Conversation is a primary cornerstone of all human relationships.

It's our ability to share stories and experience that distinguishes us from other animals. Curiosity for the lived experience of others enhances empathy and is the primary means by which we build bonds of belonging, trust, goodwill and mutual positive regard.

A third of first line managers don't feel equipped to lead a conversation with their team

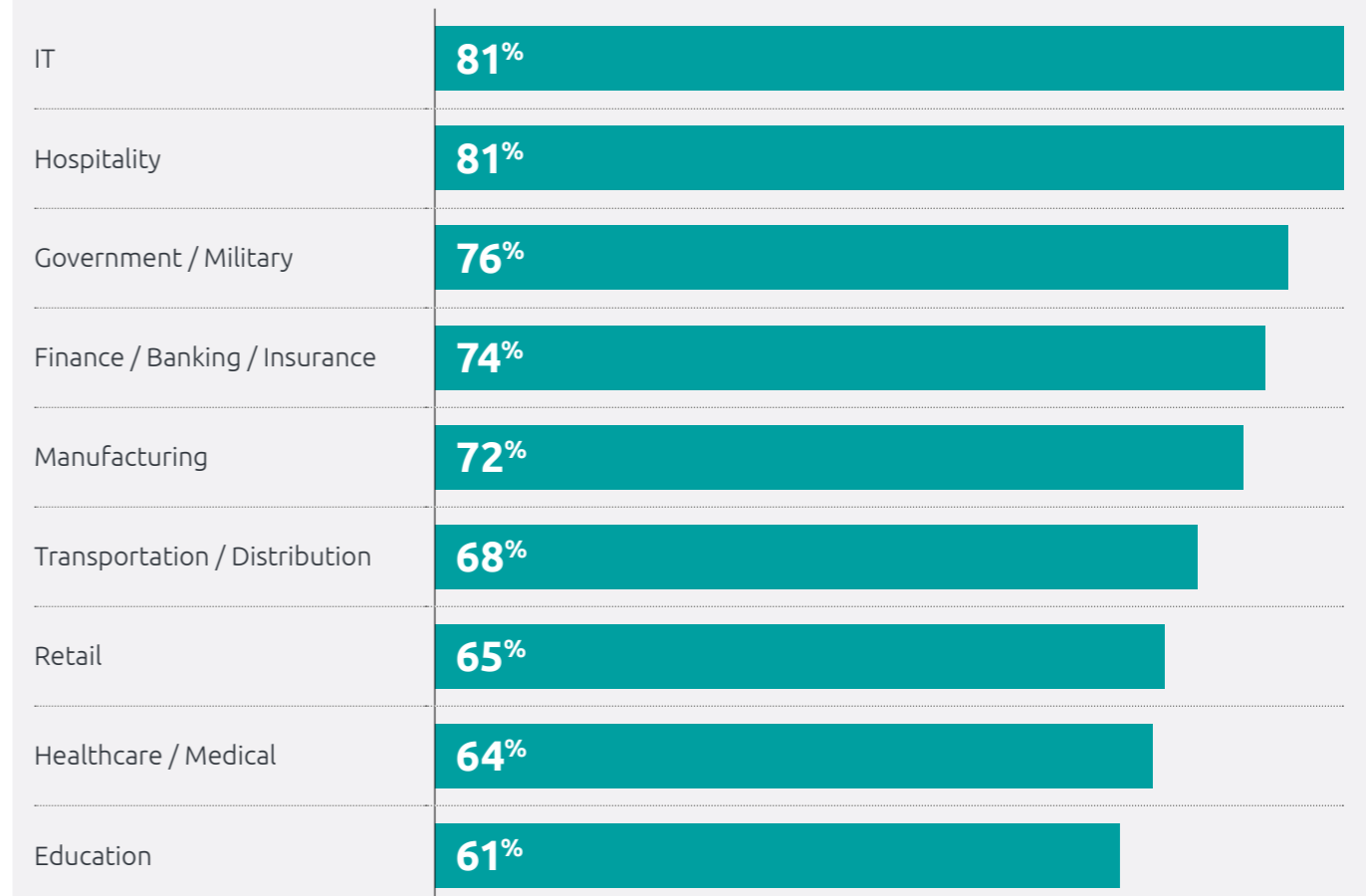
I feel equipped to lead a conversation with my team(s) on what's happening across the organisation

Key: Positive Neutral Negative



Line managers in the IT and Hospitality sectors feel best equipped to lead conversations

I feel equipped to lead a conversation with my team(s) on what's happening across the business



NB: % do not appear to add to 100% due to rounding

Leader support needs vary by seniority

It's clear there isn't a one-size-fits-all support package for managers when it comes to communication.

Team leaders need more hands-on support and information on what they should be communicating to their teams. The information they get now could benefit from greater clarity.

Support them by:

- Building explicit calls to action into manager briefings or cascade emails
- Segmenting your manager population so you can tailor briefings to their needs
- Investing in high-quality resources that managers can use to prepare their communications

Senior leaders tend to be further along on the communication maturity journey. They recognise the need to prioritise communication with their teams more. They're open to suggestions from their internal communication teams around how best to do this.

Support them by:

- Providing briefing materials in advance of key communication dates and events so they can prepare
- Introducing listening tools to help build two-way communications (see page 65 for the most effective solutions)
- Empowering your senior leaders with data about the communications preferences of their team so they find the right rhythms and solutions

Regardless of seniority, around a quarter of all managers and leaders say they need more training on communication – and we already know that employees themselves have topics they want to know more about (see pages 24–25). Responsibility for this can fall somewhere between HR and Internal Communications – but regardless of who takes the lead, organisations need to make this a priority.



“
Caroline Lagden
Head of Internal Communications,
Lloyd Banking Group

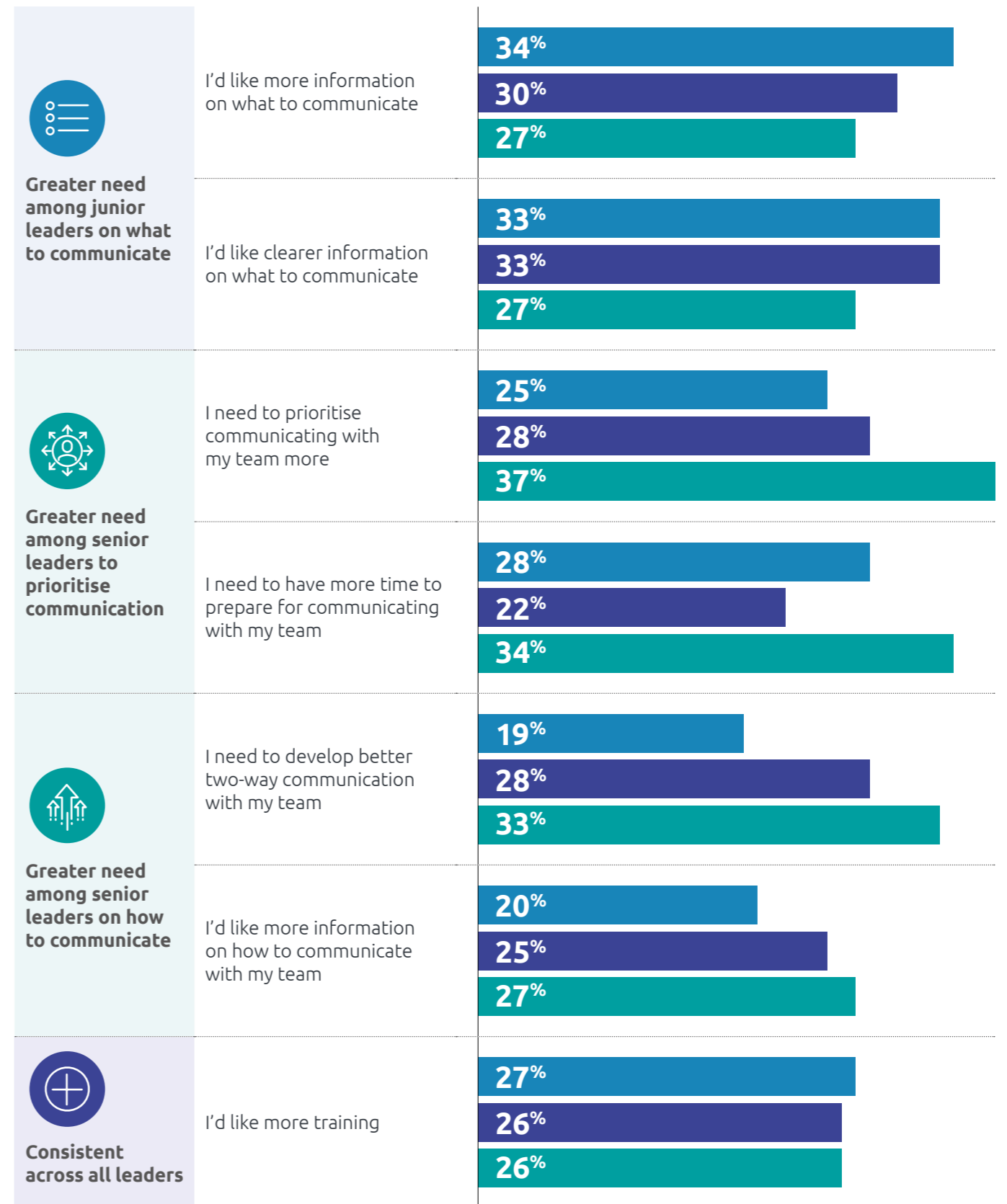
What's coming through loud and clear is the need to support leaders and line managers both as a channel and as an audience.

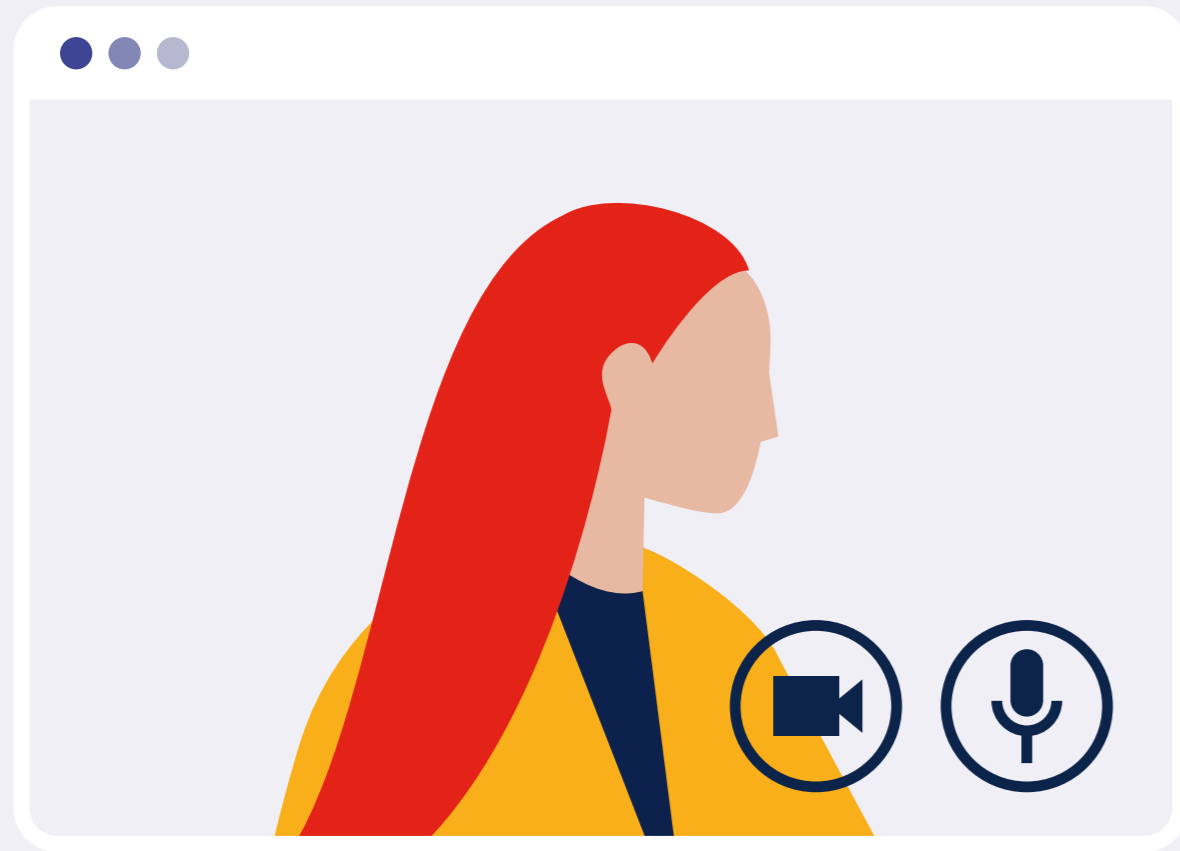
Internal Communicators can play a huge part in helping this population to have the right tools, channels and information so that they're equipped to have effective, two-way conversations with their people.

Most managers would like more and clearer guidance on what should be communicated; senior leaders want more frequent communication

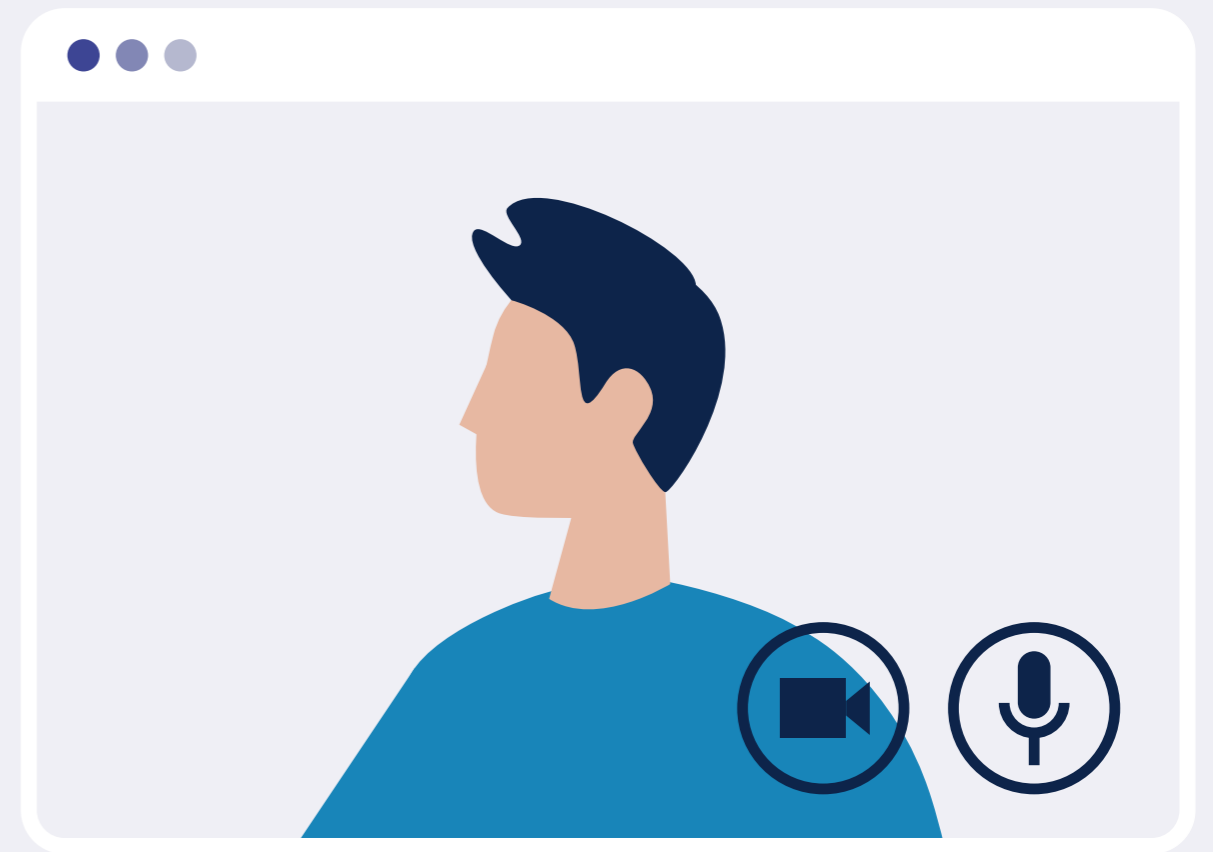
What would help you communicate more effectively with your team(s)? Select all that apply.

Key: ■ I lead a team ■ I manage people who lead teams ■ I am a senior leader of my organisation





Two-way conversation



Are we doing enough to drive dialogue?

In short: no. Around half of UK workers don't feel listened to by their employer.

Across the board, there's no strong sense that organisations welcome open and honest feedback – particularly in large organisations of 10,000+ employees, where positivity falls to 46%.

UK workers also don't feel that organisations are good at showing how their feedback informs the choices they make. For large organisations, positivity is just 37%.

The importance of acting on feedback

By controlling the narrative and showing how employee feedback is used to help inform decisions and actions, we've got lots to gain.

When organisations welcome feedback on them as an employer and show how employee feedback is used, both advocacy and engagement jump by over 20pts. And ratings of internal communication improve massively too.



Nicole Bearne

Founder,
The Comms Exchange

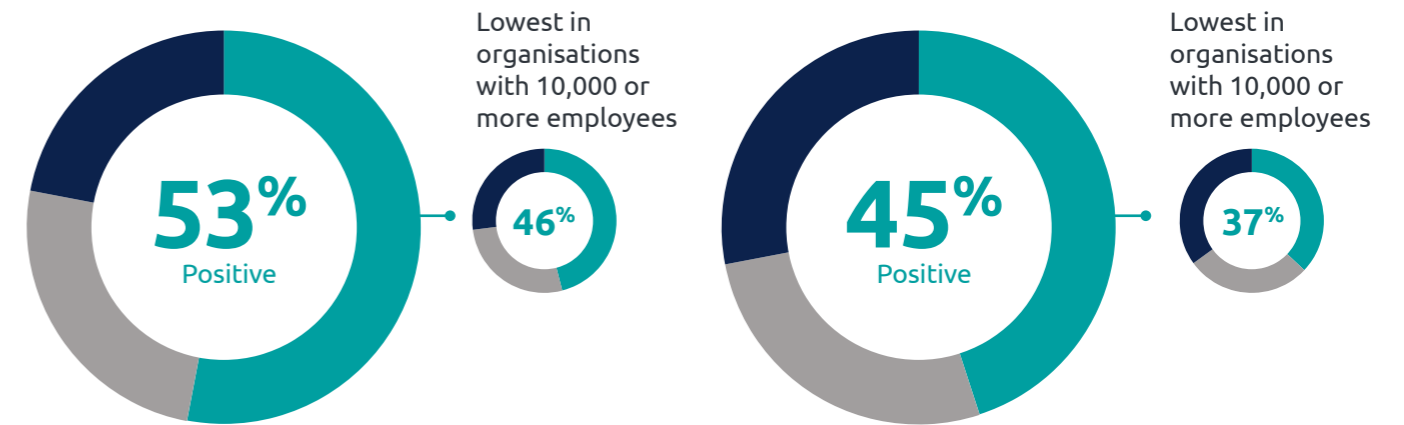
Building a culture of feedback is vital for organisational performance.

Employees at all levels possess valuable insights and expertise and, when they feel listened to, they are more likely to contribute their ideas or raise issues. This creates a culture of continuous learning and adaptation. Leaders at all levels will benefit from engaging in active listening with support and encouragement from their Internal Communications teams.

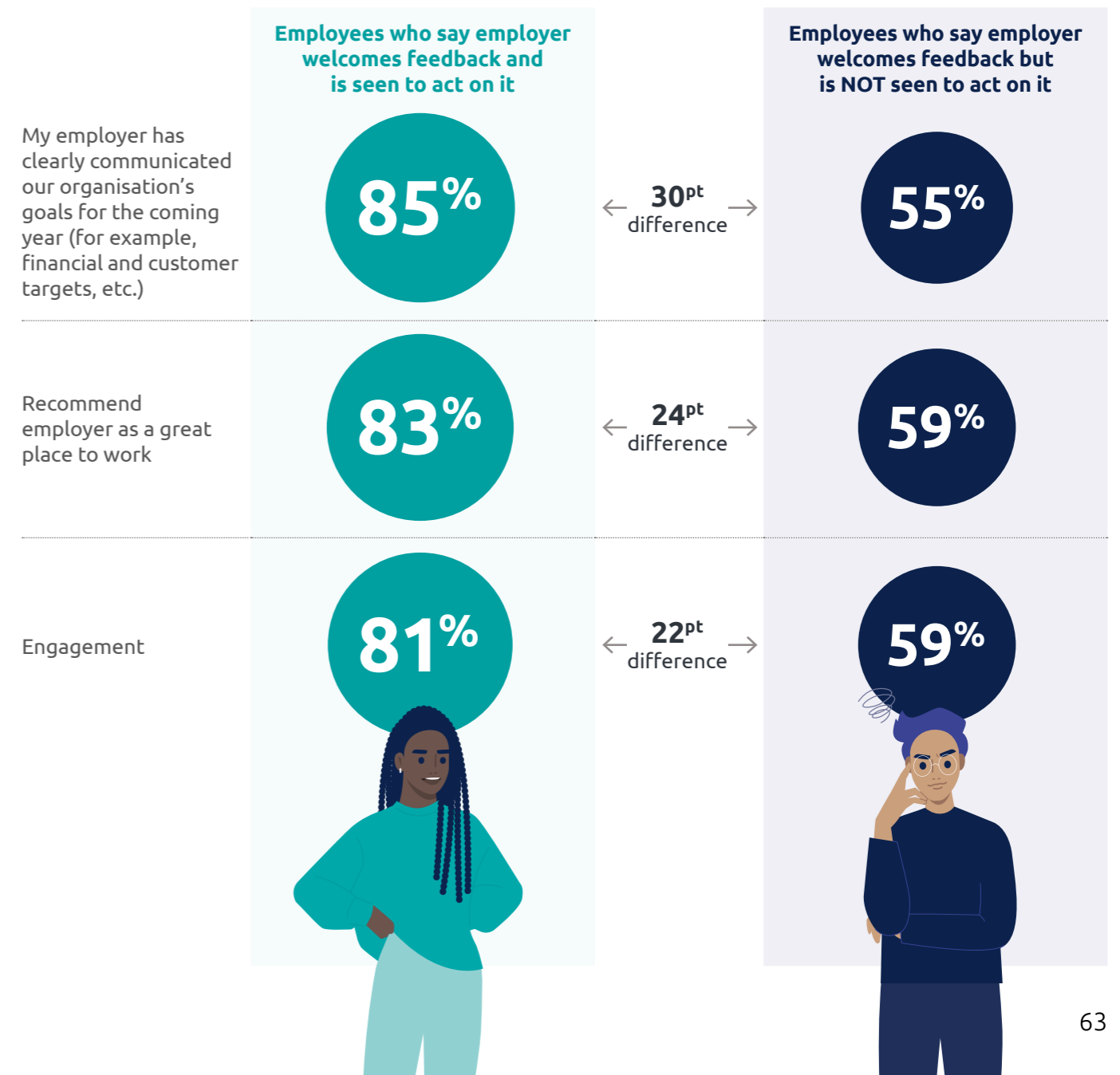
Around half don't feel listened to by their employer

I feel my organisation welcomes open and honest feedback on them as an employer

My organisation is good at showing how colleague feedback is used to help inform decisions and actions



Organisations need to welcome *and* act on feedback



We need to stay on the front foot of listening

The channels people use the most give the least positive impression of an employer's attitude to feedback.

Half of UK workers filled in the annual staff survey last year – but only 57% of those people feel their organisation is open to feedback. While these surveys are a solid foundation for an organisation's listening strategy, they're not enough on their own.

UK workers are much more positive about their employer's attitude towards open and honest feedback when they run an annual survey alongside at least two other listening channels.

The most effective combination of three channels is an annual survey, a pulse survey and two-way manager conversations. The next-best addition is an Employee Forum (also known as a Community Panel).

As might be expected, the worst thing employers can do is to not do any listening at all – in this case, the proportion of people who feel their organisation welcomes feedback plummets to less than a third.



“ Louise Breed
UK CEO, Ipsos Karian and Box

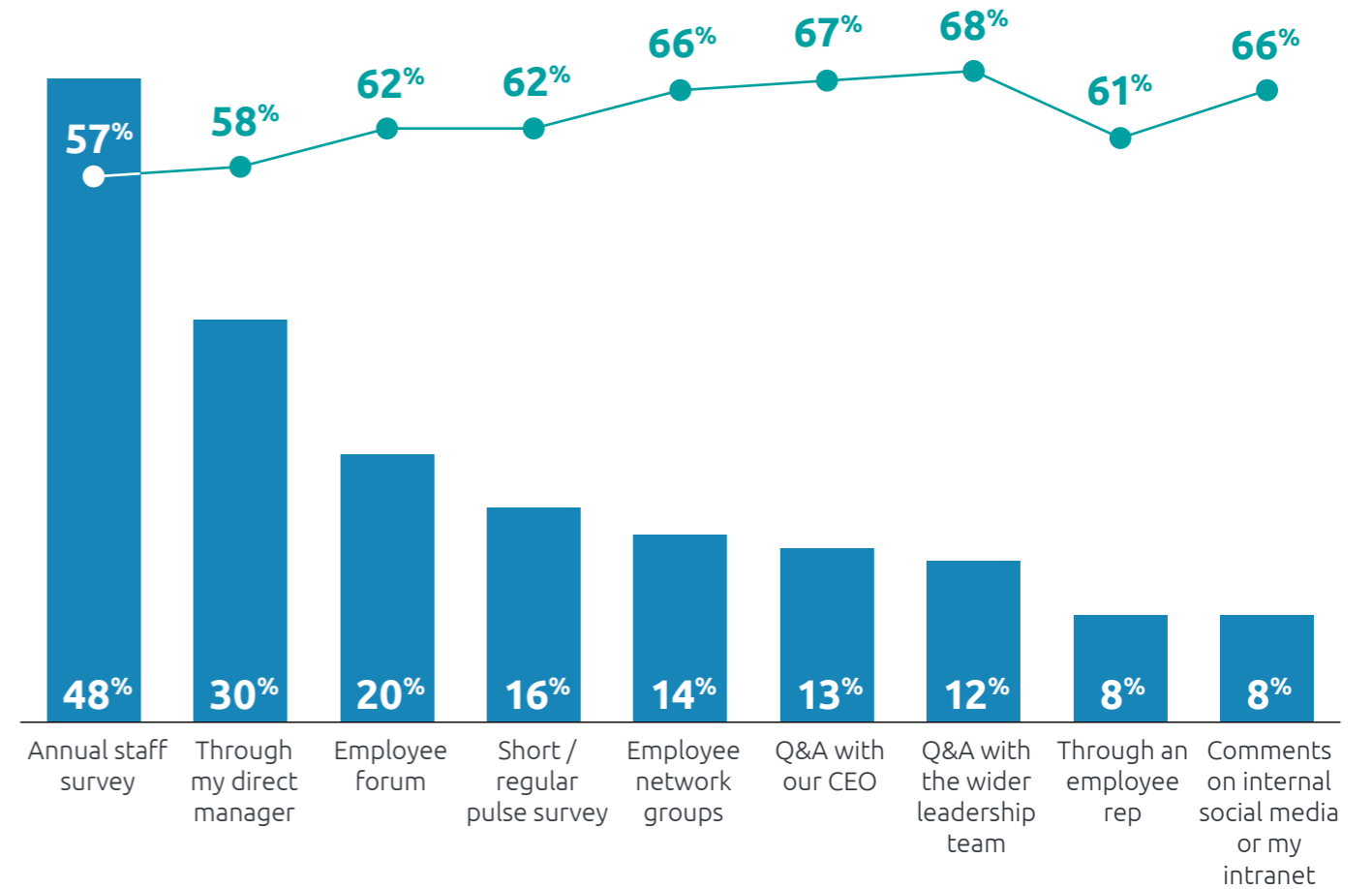
Too often siloes exist across organisations when it comes to employee listening.

The evidence here suggests that less is more, and therefore a connected, aligned listening strategy to support strategic outcomes across the employee experience is critical for bringing together listening objectives for different teams, including IC, HR, ESG and inclusion. The impact of listening is significantly undermined when it's done for the sake of checking scores and progress and not with a clear purpose to drive change or input to decision making – what we call windscreen vs. rear-view mirror listening.

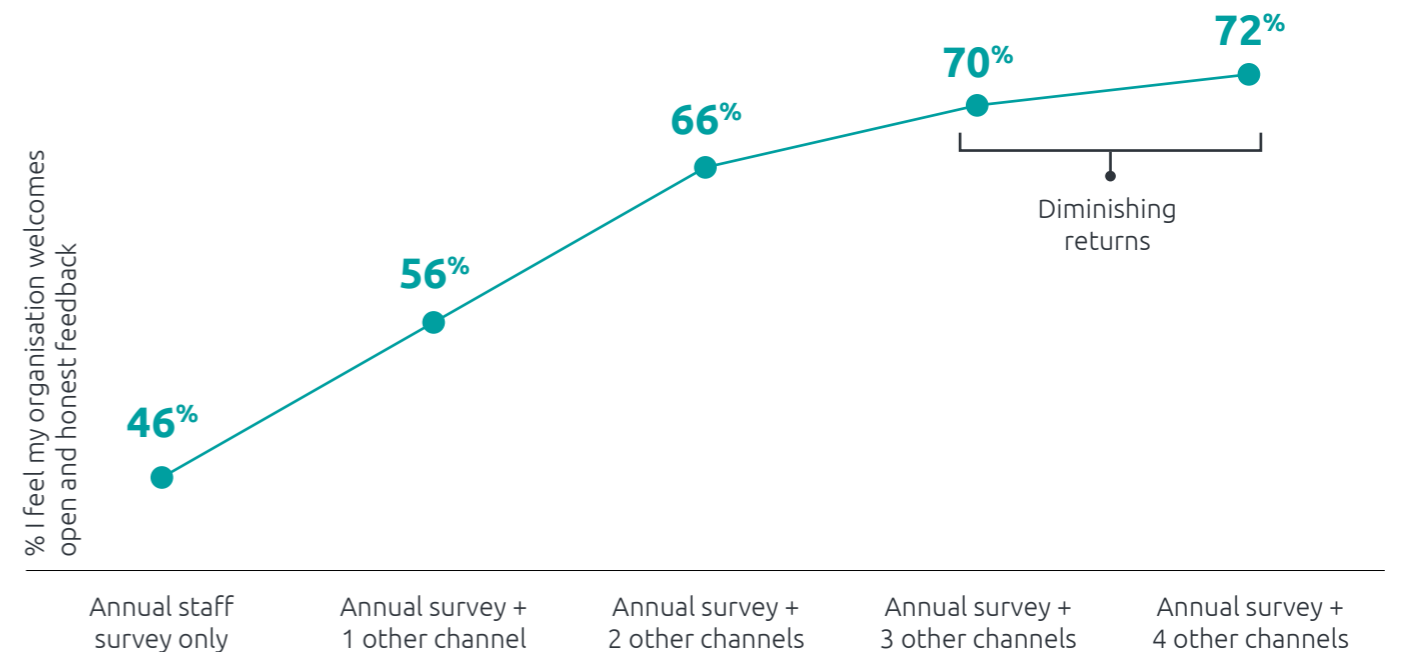
The most commonly used feedback methods are seen as less effective

In the past 12 months, how have you provided feedback within your organisation? Select all that apply.

Key: ■ Proportion selecting ● I feel my organisation welcomes open and honest feedback on them as an employer



Running an annual staff survey and 2 listening channels provides the best balance of effort and results



Methodology

About this report

- The IC Index 2023 question set was developed in collaboration with an expert working group of IC practitioners from a range of sectors to help identify the key challenges and opportunities facing the IC profession.
- A sample of 3,000 UK workers was selected to ensure the ability to dive deeper into results and themes. The sample covered only employees working in large organisations employing over 500 employees to increase the likelihood of their organisation having a dedicated internal communication function in place.
- The sample was stratified to ensure the results are representative by sector, gender and age.
- The survey was live from 6–20 March 2023.



Gender



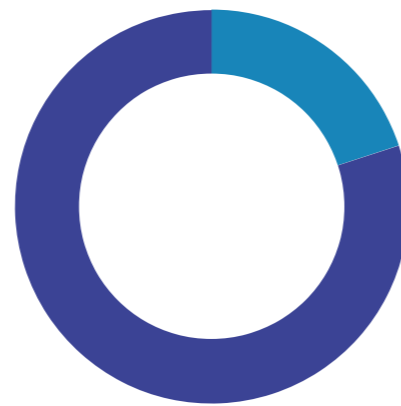
- 40% Man
- 59% Woman
- <1% Non-binary
- <1% Prefer not to say

Age



- 10% 18–24
- 30% 25–34
- 30% 35–44
- 18% 45–54
- 10% 55–64
- 2% 65 or over
- <1% Prefer not to say

Employment status



- 20% Part-time employee
- 80% Full-time employee

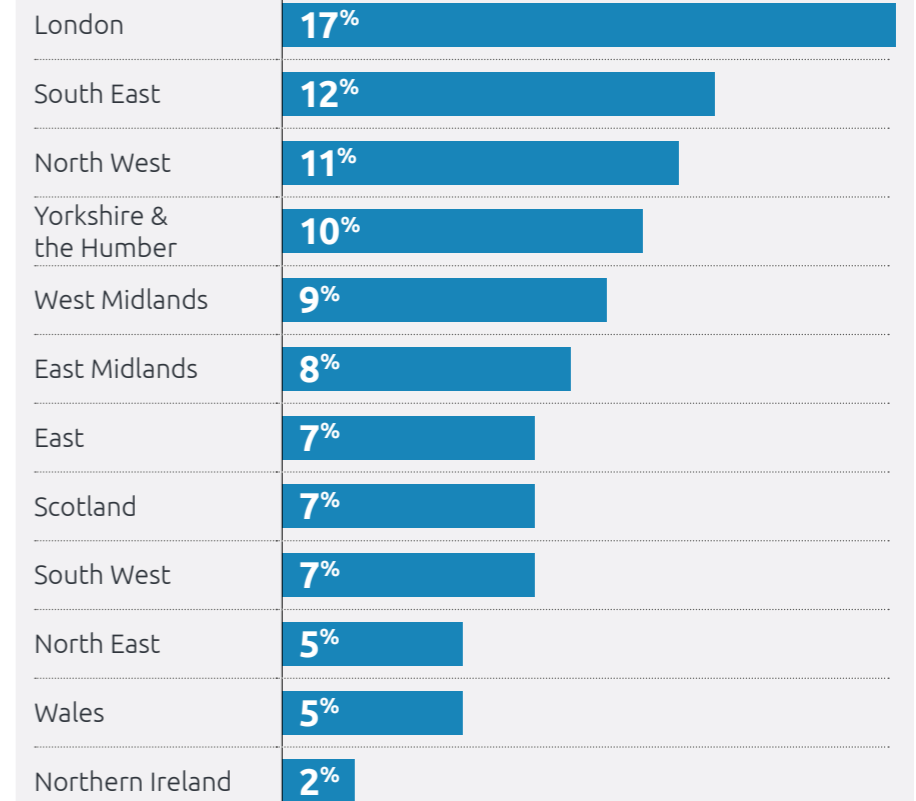
Organisation size

Total headcount



- 28% 500–999
- 29% 1,000–4,999
- 15% 5,000–9,999
- 28% 10,000 or more

UK region



Sector

- | | | |
|--------------------------------------|---|--|
| 15% Retail | 2% Construction / Home Improvement | 1% Telecommunications |
| 10% Finance / Banking / Insurance | 2% Engineering / Architecture | 1% Utilities |
| 9% Healthcare / Medical | 2% Food Service | 1% Wholesales |
| 8% IT | 2% Legal | 1% Business / Professional Services |
| 6% Government / Military | 2% Non-profit | <1% Agriculture / Forestry / Fishing |
| 5% Education | 1% Advertising | <1% Biotechnology |
| 5% Manufacturing | 1% Consulting | <1% Entertainment / Recreation |
| 5% Transportation / Distribution | 1% Marketing / Market Research / Public Relations | <1% Mining |
| 4% Hospitality | 1% Media / Printing / Publishing | <1% Research / Science |
| 3% Accounting | 1% Pharmaceutical / Chemical | <1% Utilities (Electric, Gas, Sanitary Services) |
| 2% Aerospace / Aviation / Automotive | 1% Real Estate | 8% Other |

The research behind this report was conducted by Ipsos Karian and Box on behalf of the IoIC.

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