

Internal Communication across Europe 2005



A research report by FEIEA in cooperation
with Trident Communications

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Executive Summary

Business and Strategy

- The customer is king
- Eight out of ten rate communication a key success factor
- Tactical tasks are the reality, strategic planning still a wish
- Short term planning beats long term thinking
- Crisis handling shows great room for improvement
- Internal communication and business strategy not tied tightly
- Biggest barrier to effective communication is lack of commitment

Roles and Resources

- Dedicated internal communication departments are on the way up
- Internal communication managers have remained mainly in upper and middle management
- Most internal communication departments employ two to three people
- The male:female ratio of internal communicators is becoming more balanced – for staff and management
- Formal education is still not required for internal communication
- Design and translation agencies are demanded the most
- Projects outsourced: campaigns, print media and websites

Culture and Behaviour

- The majority of internal communication has remained top down
- Departments are still suffering from silo mentalities
- The company philosophy is more formalised, but less often lived
- The unofficial grapevine plays an important role
- Time for chats has slightly increased – the cafeteria being the preferred place to talk
- Internal communication is losing courage – bullying and delicate topics are less often dealt with

Tools and Topicality

- E-mail has caught up with employee magazines regarding effectiveness
- Conferences are scoring highly – against the downwards trend in events
- Stronger direct communication is balancing the use of new information and communication technologies
- The majority of employee magazines are published quarterly or less often, distributed only to employees, and have 12 to 16 pages
- About three quarters of employees have intranet access – about as many areas are represented there
- Two thirds of intranets are updated at least daily
- Urgent information is mainly spread via electronic channels and cascades

Measurement and Evaluation

- About three quarters think they communicate effectively – under normal conditions as well as in a crisis
- Less than two thirds use defined goals to evaluate internal communication success
- Nine in ten do some sort of evaluation at least sometimes

The Future

- Future focus on increased intranet access, two-way communication, evaluation and corporate identity
- Less fears and hopes regarding new information and communication technologies
- The majority still believe in the increasing importance of internal communication
- Only slight optimism regarding increased budgets for internal communication
- Internal communication jobs have become less secure

Background to Research

The Federation of European Business Communicators Associations, formerly known as the Federation of European Internal Editors Association (FEIEA) conducted its first comprehensive study on Internal Communication Across Europe in 2001 to gather data on internal communication in FEIEA-member countries, capture detailed information on the internal communication situation in Europe and gain insight into future developments.

Why did we repeat the study in 2005?

The business environment – and with it the field of internal communication – has undergone major changes since 2001:

- Greater turbulence and competitiveness: Increased economic pressures, changing technology, rapidly diversifying employee and customer bases, an increasing awareness of organisational relationships to society. These and many other factors contribute to new organisation types, new relationships between organisations and employees, and a growing acknowledgement of the complexity of organisational life. A generally changing relationship between management and employees through part-time and contract employment, self-managing teams, tele-work and the virtual organisation are but a few of the changes that impact internal communication.
- Quality and customer service are focused: Another reason for organisations to re-examine their structures and processes is the customers' increased sophistication and expectation of quality products and services. Today, virtually every workplace has a special program designed to bring about total quality or total customer satisfaction.
- Changing values and new priorities in regarding work: At the same time that more and more is expected from employees, a contradictory trend has begun. Increased desire for autonomy, self-development, and balance between work and family life is surfacing among many workers. People are seeking more meaningful work experiences, as well as more involvement in the decisions pertaining to themselves. They try to retreat from the extreme materialism and individualism of the 80s and 90s and are struggling to find, or to rediscover, some sense of balance between career, individual goal achievement, family and community. There is a recovery from 'workaholism'.
- Shifting power bases: Today there is a dramatic shift away from tangible resources like land, equipment, oil etc. toward less tangible information resources. We are commonly said to be living in an information society and moving into the knowledge age. Knowledge will be the ultimate source of power.

Objectives of Research

- Evaluate the progress of internal communication between 2001 and 2005
- Identify internal communication best practices and gaps in internal communication in FEIEA member states in the areas of:
 - Business and Strategy
 - Roles and Resources
 - Culture and Behaviour
 - Tools and Topicality
 - Measurement and Evaluation
 - The Future
- Assess present trends and future developments of internal communication in FEIEA member states
- Ensure that the field of internal communication continues to move forward as a result of this project

Method of Research

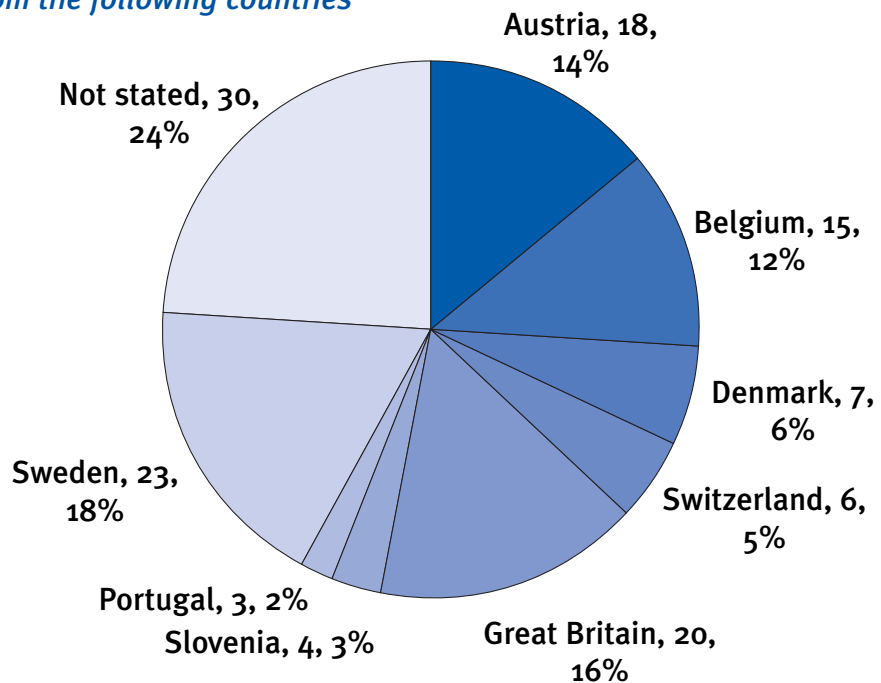
A quantitative follow-up survey with

- pre-tested, web-based questionnaires: one being tailored to corporate members and another specifically tailored to agencies to fully establish the current views as perceived by FEIEA members who are working in different areas in the field of internal communication. The questionnaires adapted the 2001 survey to new needs by aligning with the developments of the field of internal communication and including topics FEIEA is taking special interest in
- 5,000 FEIEA members of the 12 national associations that displays a
 - representative, statistically significant picture of perceptions of internal communication in FEIEA member states and allows
 - comparisons with the benchmark set in 2001.

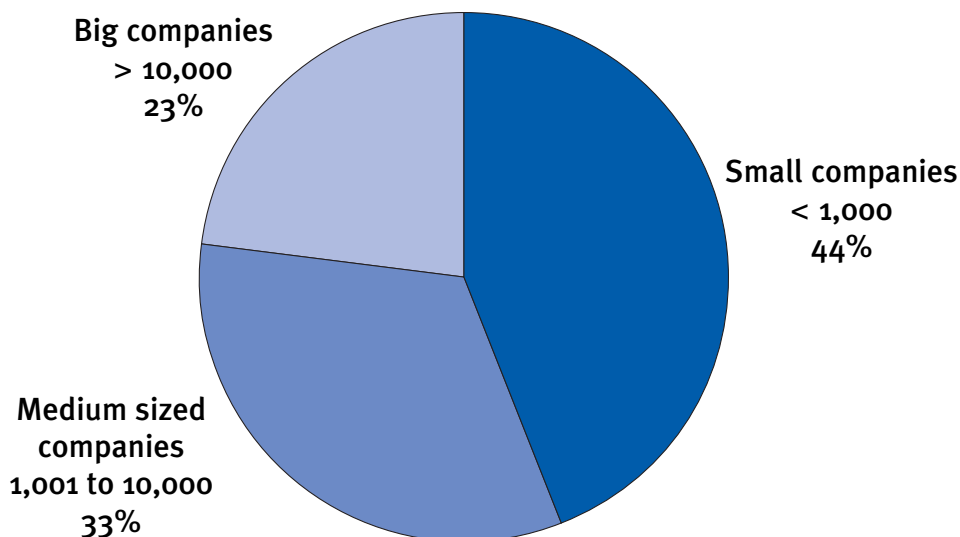
Participants

- A total of 126 participants (2.5 per cent of all FEIEA members): 107 from the corporate environment, 19 from agencies
- Most respondents come from Sweden (18 per cent), Great Britain (16 per cent), Austria (14 per cent) and Belgium (12 per cent)
- Respondents are from diverse sectors; most prominent are the areas of service (37 per cent) and manufacturing (22 per cent)
- Agency participants work mostly for internal communication or public relations agencies (38 per cent each)
- 44 per cent of participants work for companies with less than 1,000 employees, 23 per cent for companies with more than 10,000 people
- 50 per cent of agency participants employ not more than 5 people, 13 per cent more than 100 employees
- 45 per cent of companies/agencies operate in one country only, another 33 per cent across more than ten countries

126 participants from the following countries



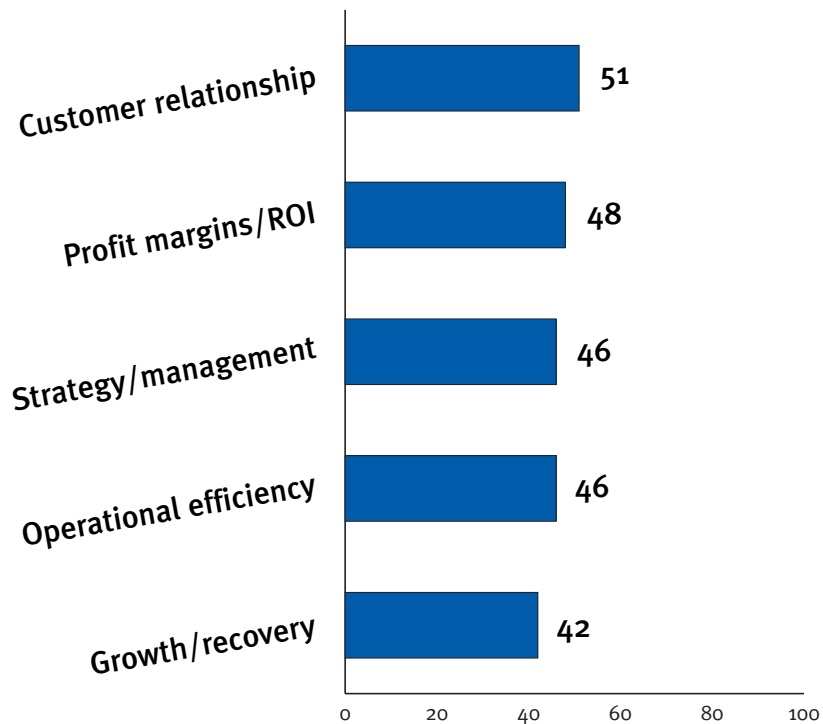
Number of employees per company



Business and Strategy

- The customer is king
- Eight out of ten rate communication a key success factor
- Tactical tasks are the reality, strategic planning still a wish
- Short term planning beats long term thinking
- Crisis handling shows great room for improvement
- Internal communication and business strategy not tied tightly
- Biggest barrier to effective communication is lack of commitment

The 5 most important business issues



08

Countries

- Customer relationship is the most important business issue in Switzerland (80 per cent), Denmark (71 per cent) and Great Britain (63 per cent)
- Operational efficiency scores highest in Belgium (69 per cent)
- Strategy/management is on top in Austria (58 per cent)

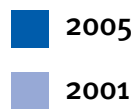
Company size

- Customer relationship is ranked first in small companies (1 to 1,000 employees), second in medium sized companies (1,001 to 10,000) and third in big companies (more than 10,000) – all around 52 per cent
- Medium sized companies see strategy/management as even more important (65 per cent)
- Big companies' main concerns are return on investment (65 per cent) and operational efficiency (57 per cent)

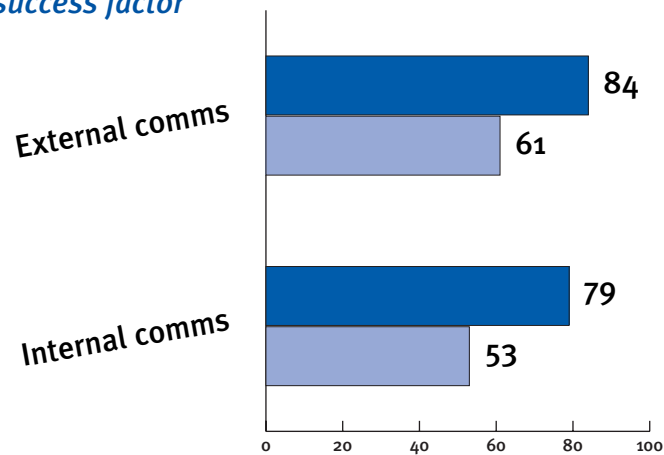
Corporate versus agencies

- Customer relationship is the top scorer in the corporate environment
- Agencies think that competition/competitive pressures are the companies' main worries (61 per cent)

Communication is a key success factor



(Strongly) Agree



Countries

- Every respondent from Denmark and Switzerland sees external communication as a success factor
- Austria rates external and internal communication equally high with 91 per cent each
- Belgium is the only country that thinks internal communication (84 per cent) is contributing significantly more to a company's success than external communication (67 per cent)
- Great Britain and Sweden are least optimistic regarding their assessment of communication as a key success factor (external communication is rated 74 per cent by both; internal communication scores 69 per cent in Great Britain and 75 per cent Sweden)

Company size

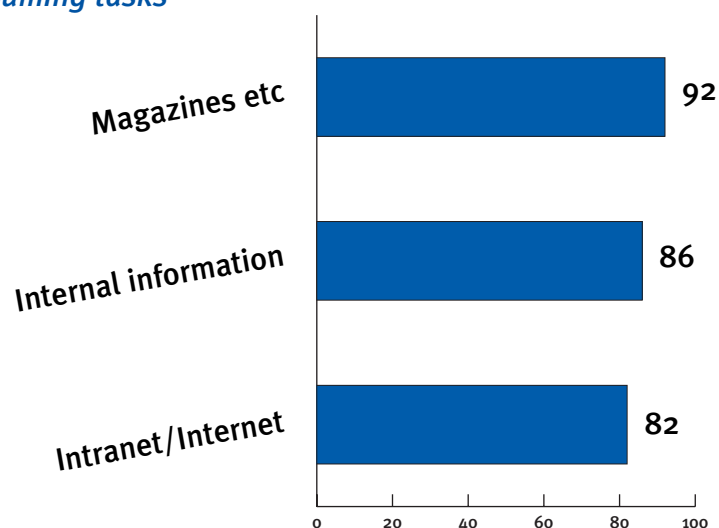
- Big companies are most convinced that communication is a key success factor – this is especially true for external communication (91 per cent versus 83 per cent for internal communication)
- Small and medium sized companies are slightly behind when it comes to assessing the value of external communication (around 79 per cent), but hold internal communication as equally important

Corporate versus agencies

- The corporate environment rates the contribution of internal communication more highly than agencies (82 per cent versus 70 per cent) – internal and external communication are seen equally important in companies, while agencies rate external communication 19 per cent higher than internal communication (89 per cent versus 70 per cent)
- Agencies think that competition/competitive pressures are the companies' main worries (61 per cent)

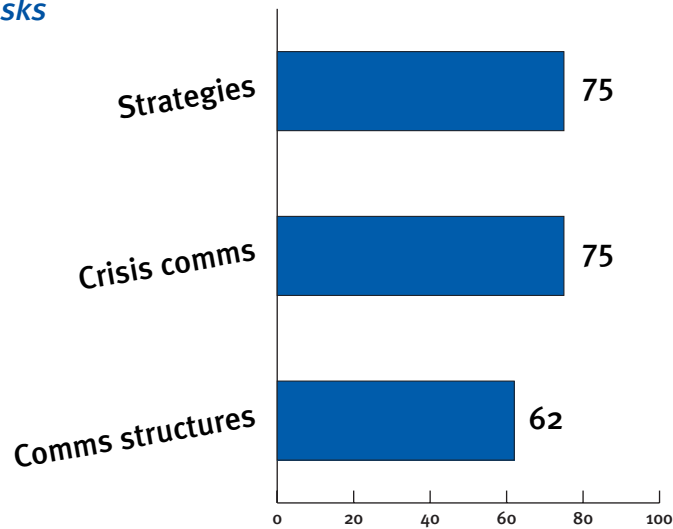
The 3 most time consuming tasks

I currently spend time on



The 3 most important tasks

I should be spending time on



Countries

- Currently also time-consuming is organising events – this is especially true for Great Britain, Belgium, Sweden and Switzerland
- Belgium is already spending a lot of time on setting up/looking after communication structures (80 per cent)
- Great Britain is the only country that is quite focused on crisis communication (67 per cent)
- Almost all countries have identified a need for internal communication to support business issues to a greater extent – only Austria, Sweden and Switzerland are already doing well in this respect. In Austria ‘supporting business issues’ was even identified as one of the most time-consuming tasks (70 per cent)

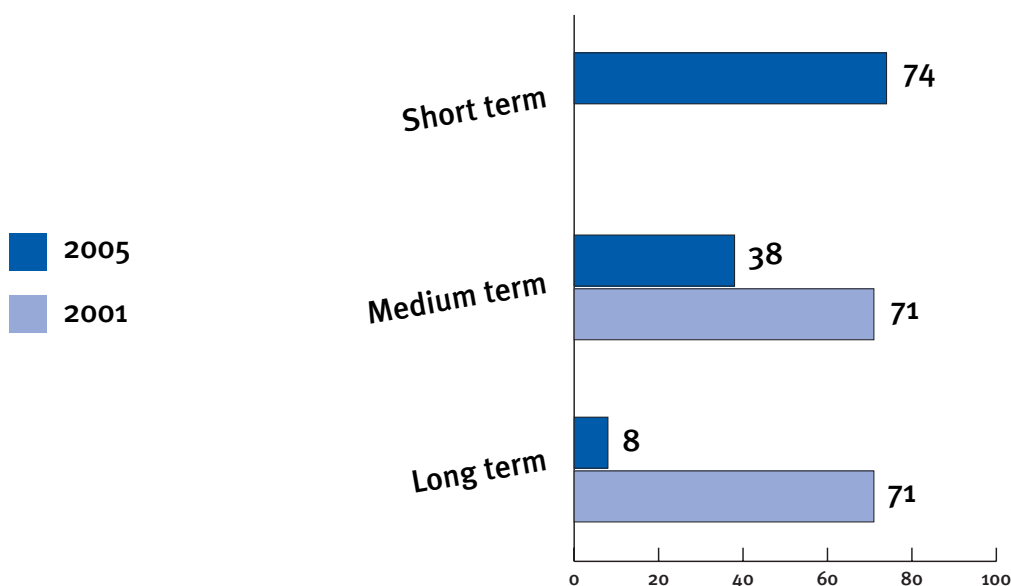
Company size

- While small and big businesses are quite confident that their communication is supporting business issues, medium sized businesses think that they need to improve in that respect

Corporate versus agencies

- The corporate world is more convinced that their communication supports business issues than agencies are about the communication of their clients

Defined goals for internal communication exist



Countries

- Denmark (86 per cent) and Austria (83 per cent) score highest regarding short term goals
- Belgium (54 per cent) and Sweden (47 per cent) are doing comparatively very well regarding medium term goals
- Switzerland is (20 per cent) the top scorer regarding long term goals

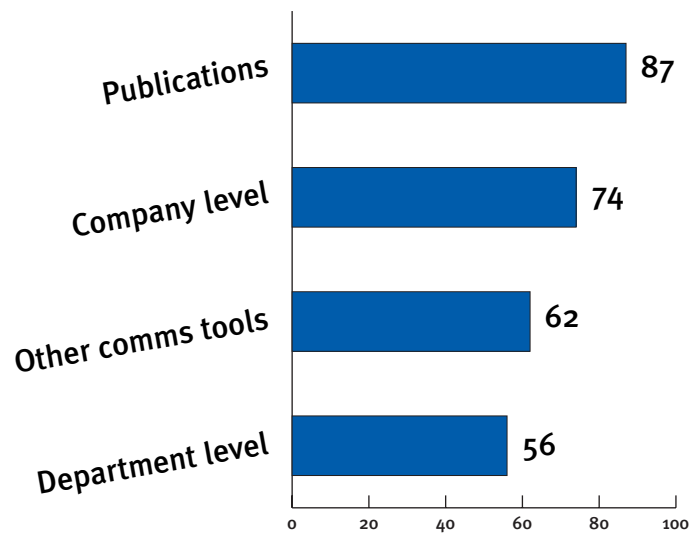
Company size

- Medium sized companies are on the forefront regarding short (81 per cent) and medium (56 per cent) term planning
- Big companies rank first regarding long term goals (13 per cent)

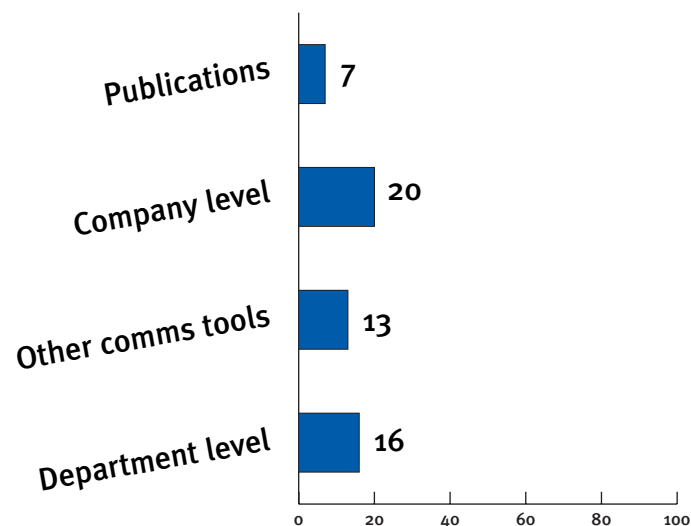
Corporate versus agencies

- Agencies are slightly more optimistic regarding their clients' short (83 per cent versus 72 per cent) and long (12 per cent versus 7 per cent) term goals than companies themselves, but see a much greater weakness in medium term planning (21 per cent versus 41 per cent)

An internal communication strategy exists under normal conditions



An internal communication strategy exists in a crisis



Countries

- Denmark (86 per cent) and Belgium (85 per cent) are the top scorers on a company level under normal conditions while Austria (67 per cent) and Sweden (68 per cent) score more modestly
- In a crisis Great Britain (37 per cent) seems to be best prepared on a company level – followed by Sweden (26 per cent)
- Regarding editorial policies (publications) Austria has the most robust strategies in place (92 per cent) under normal conditions
- Sweden (68 per cent) and Denmark (57 per cent) are on top under normal conditions on departmental level

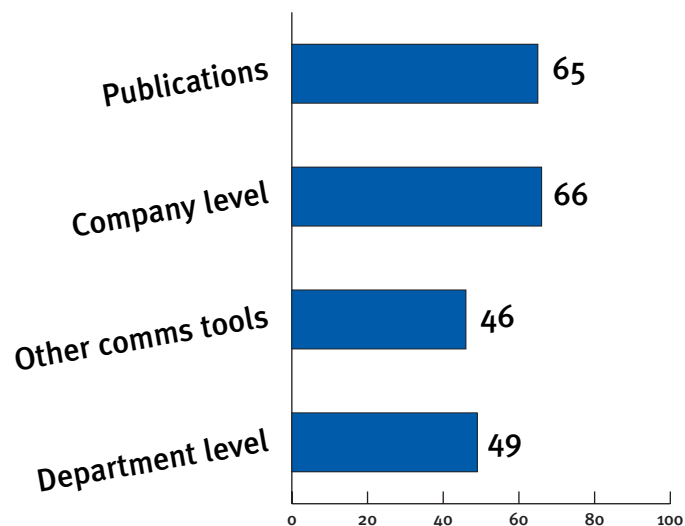
Company size

- Under normal conditions, medium sized companies score highest (88 per cent versus 68 per cent in small and 65 per cent in big companies) on a company level
- Under normal conditions, big companies are doing best (61 per cent versus 52 per cent in small and 53 per cent in medium sized companies) on departmental level
- For crisis situations, medium sized companies score highest and small companies lowest in all areas

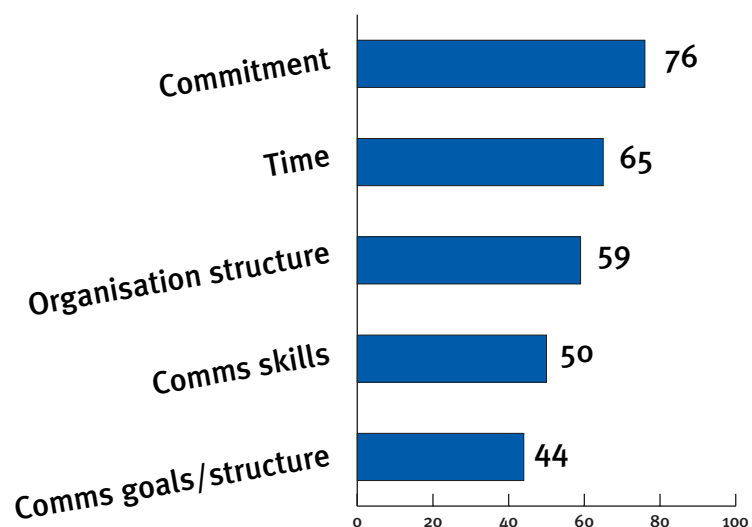
Corporate versus agencies

- Agencies think that their clients are doing slightly better than the corporate world in general

Internal communication strategy ties in with business strategy



The 5 biggest barriers to effective communication



Countries

- ❖ All countries are more or less in line with the overall results
- ❖ Austria sees less of a problem with communication skills and communication goals/structures, but has more of a problem with budgets
- ❖ Belgium rates communication skills as critical
- ❖ Sweden has more of an issue with the organisation structure
- ❖ Switzerland has more of a problem with communication skills and less of a problem with organisation structure

Company size

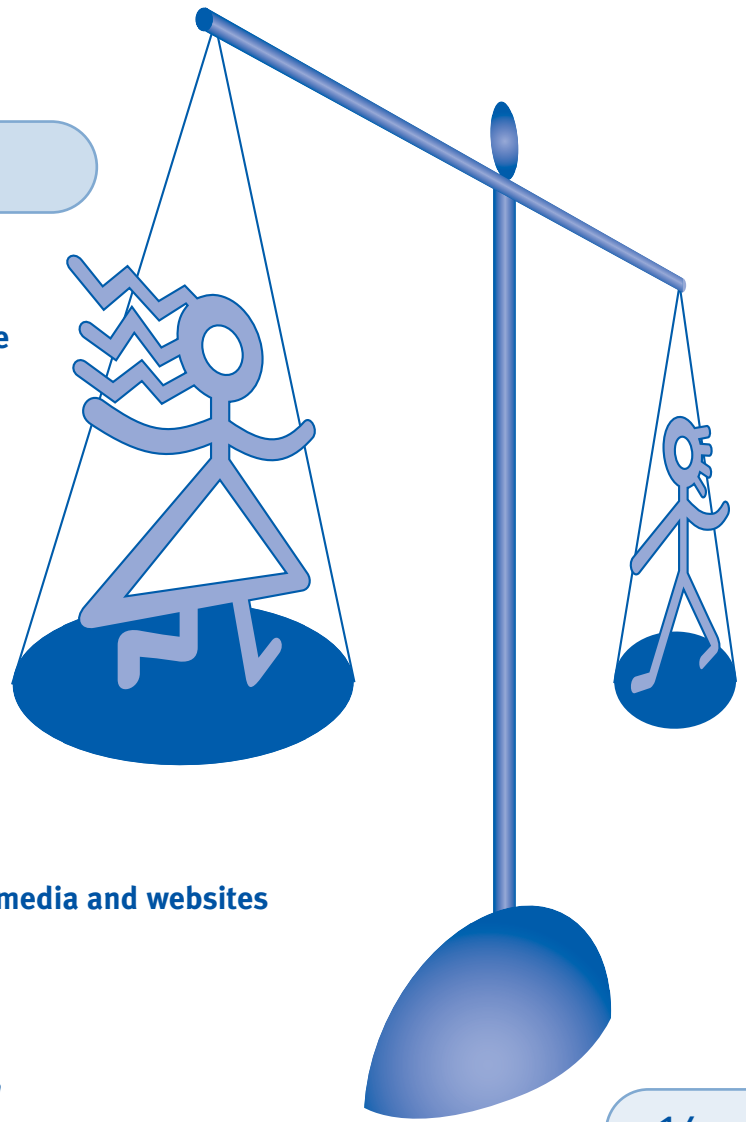
- ❖ While small and medium sized companies see commitment as the biggest problem, big organisations blame organisation structure (74 per cent), commitment (65 per cent) and time (65 per cent)

Corporate versus agencies

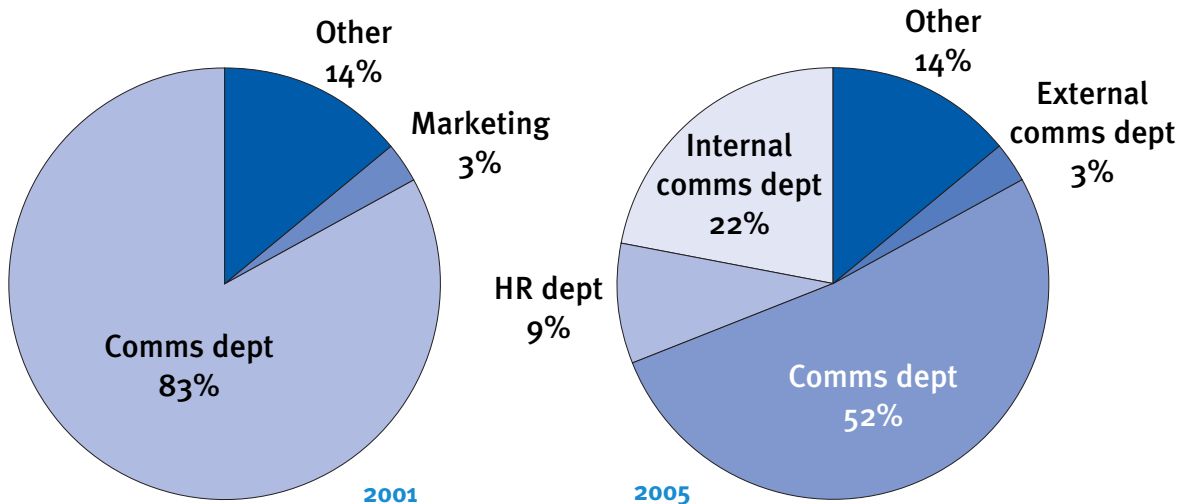
- ❖ While companies say they have more of an issue with time (67 per cent), agencies think that one of the main barriers is money (74 per cent)

Roles and Resources

- Dedicated internal communication departments are on the way up
- Internal communication managers have remained mainly in upper and middle management
- Most internal communication departments employ two to three people
- The male:female ratio of internal communicators is becoming more balanced – for staff and management
- Formal education is still not required for internal communication
- Design and translation agencies are demanded the most
- Projects outsourced: campaigns, print media and websites



Responsibility for internal communication



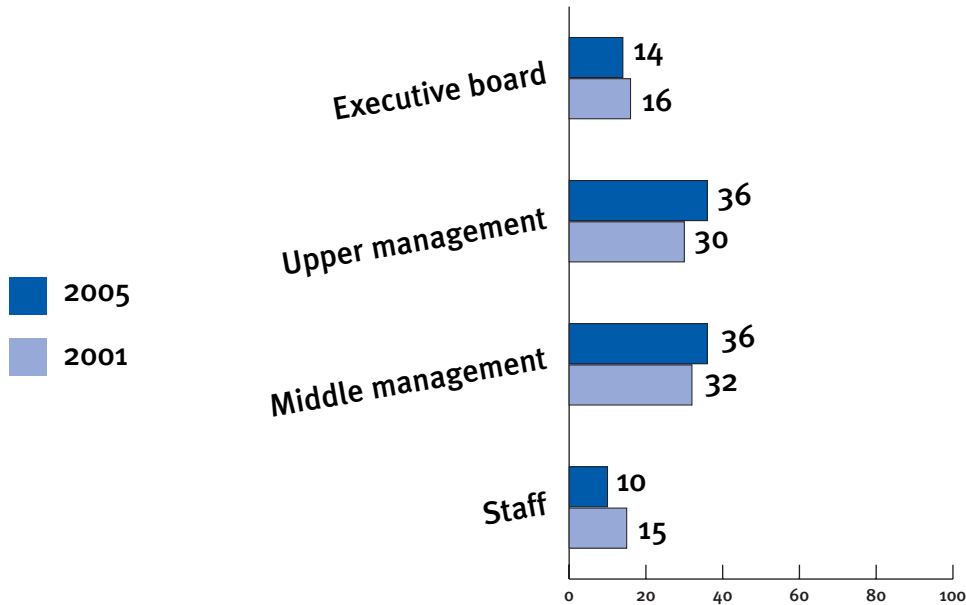
Countries

- Denmark has an extraordinarily high percentage of internal communication departments (43 per cent), followed by Great Britain (32 per cent)
- Generally, the main responsibility for internal communication is held by general communication departments – especially in Austria (75 per cent), Sweden (63 per cent) and Switzerland (60 per cent)

Company size

- Big companies have most often separate internal communication departments (32 per cent versus 14 per cent in small companies and 18 per cent in medium sized companies)

Position of internal communication manager



Countries

- Sweden is the country with the most senior internal communication managers (30 per cent on executive level, 35 per cent on upper management level)
- In Austria two thirds of internal communication managers are in upper management
- In Belgium the majority of internal communication managers are in middle management (54 per cent)
- Denmark and Switzerland are the countries with the least senior internal communication managers (57 per cent and 40 per cent are on staff level, respectively)

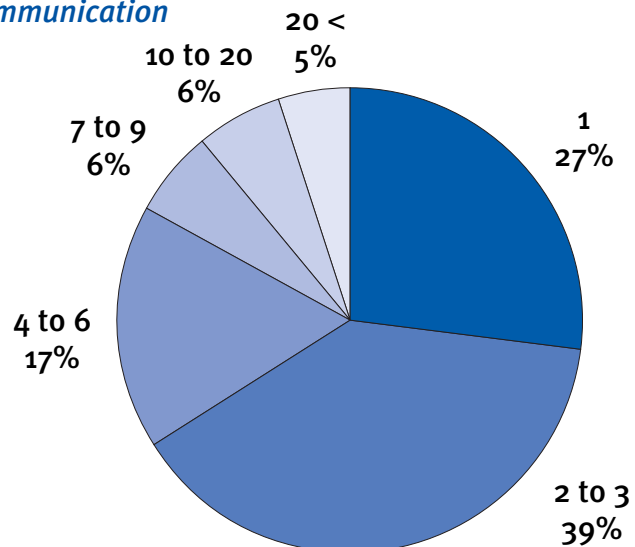
Company size

- Regardless of the company size, most of internal communication managers are in upper management
- Medium sized companies have the largest group with of internal communication managers on executive level (18 per cent)

Corporate versus agencies

- Companies say that most internal communication managers are in upper management
- Agencies deal mostly with internal communication managers in middle management positions

Number of employees in internal communication



Countries

→ Apart from Austria which allocates usually a single person to internal communications, all other countries employ mostly two to three employees in internal communication

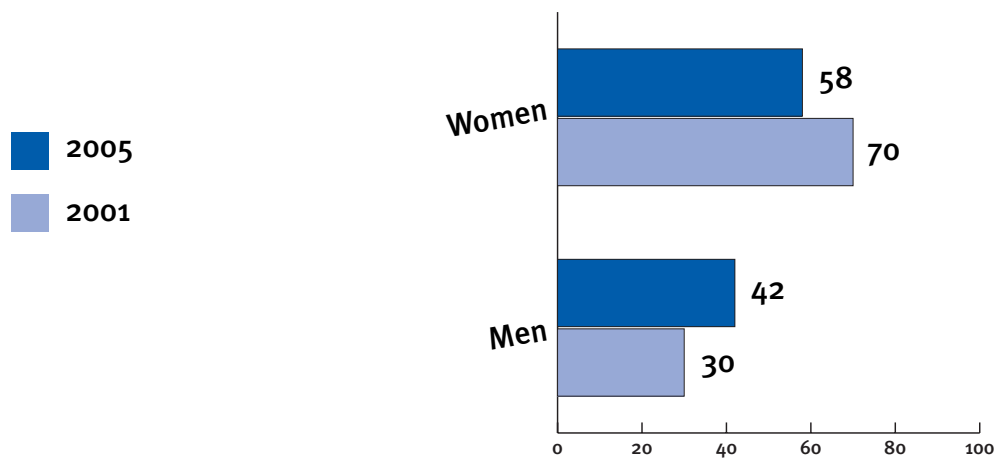
Company size

→ Regardless of the company size, most companies employ two to three people in internal communication

Corporate versus agencies

→ Agencies deal mostly with companies that employ four to six internal communicators

The male:female ratio of internal communicators



Countries

- Belgium, Denmark and Sweden think that more men are working in internal communication management and more women as internal communication staff
- Austria and Great Britain have more women in internal communication throughout – with the ratio in management being even more favourable for women
- Switzerland thinks that the ratio in management is 50:50 and that there are more men working as internal communication staff

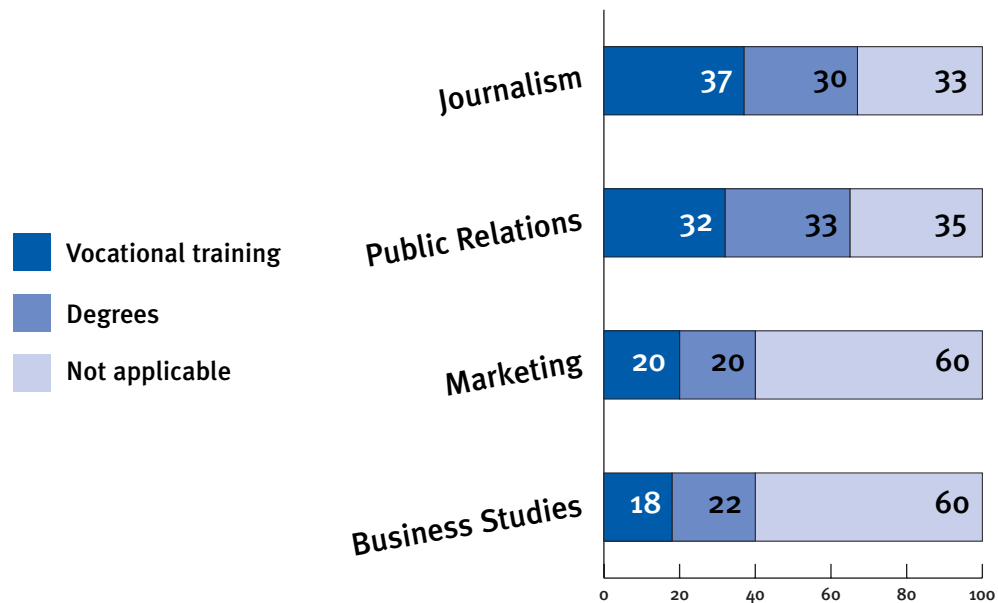
Company size

- Small companies think there are slightly more men in internal communication management as well as working as staff
- Medium sized companies have slightly more men in internal communication management and slightly more women working as internal communication staff
- Big companies have more women throughout

Corporate versus agencies

→ Agencies say that their clients employ more men in internal communication management and more women as internal communication staff, while companies see the ratio in management quite evenly balanced

Formal education required for internal communication



Countries

- Belgium and Sweden favour degrees in journalism and public relations the most (45 per cent and 44 per cent, respectively)
- Degrees in journalism are also regarded highly by Denmark and Switzerland (43 per cent and 40 per cent, respectively) while Austria is more focused on degrees in public relations (33 per cent)
- Hardly anybody in Great Britain is of the opinion that degrees are required
- Vocational training in journalism and public relations is most valued in Austria and Sweden (around 50 per cent and 44 per cent, respectively) – and least valued by Belgium and Denmark

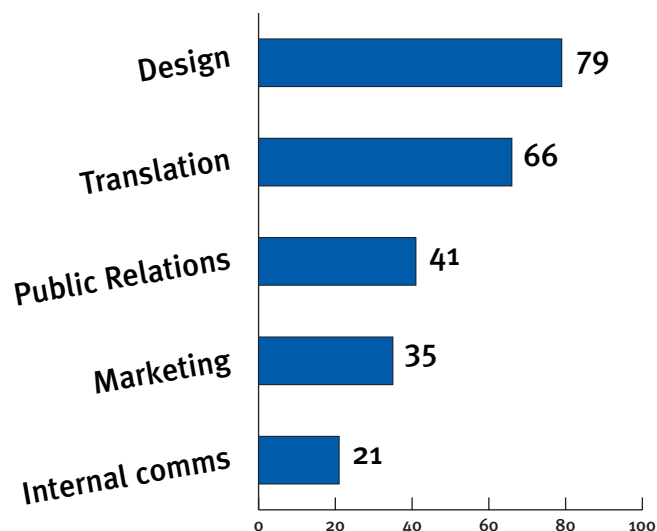
Company size

- Small companies regard vocational training as more important than medium sized and big companies
- Medium sized companies are most in favour of journalism and public relations degrees

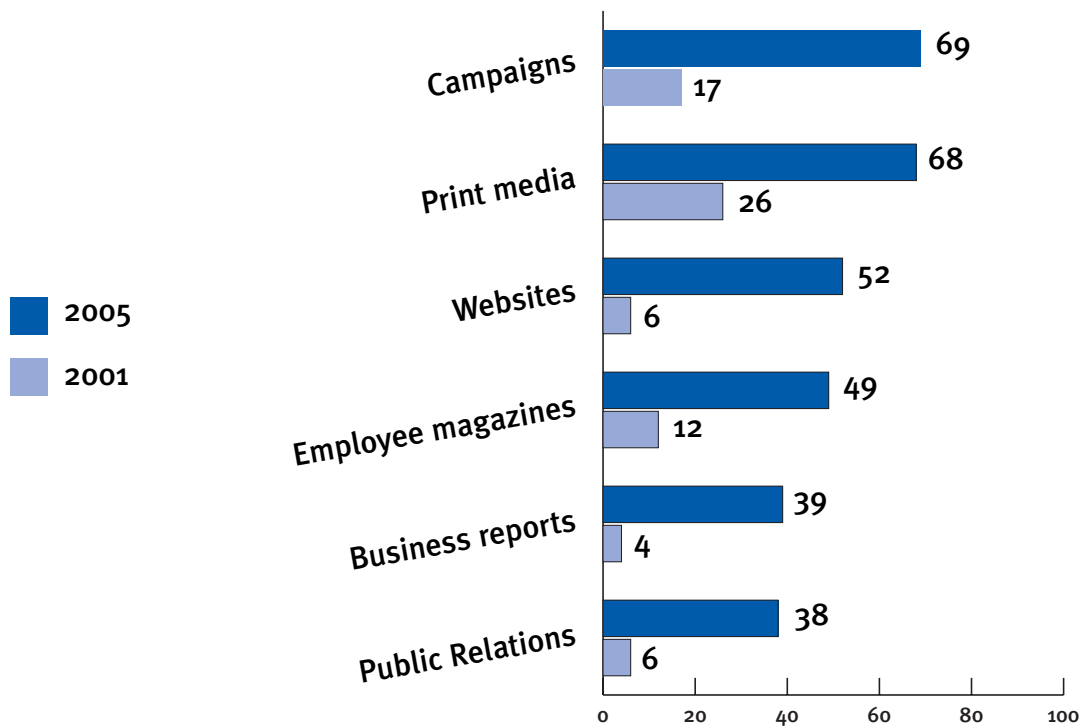
Corporate versus agencies

- Agencies rate vocational training in journalism and public relations as well as degrees in marketing and business studies much higher than companies

Type of agencies employed



Type of projects agencies are employed for*



* This question was open in 2001 and closed in 2005. Closed questions provoke a higher response so percentages are not comparable. The information from 2001 and 2005 can be used to find out about trends in the ranking regarding type of agency projects.

Countries

- Generally, countries are aligned to the overall results
- Austria uses agencies a bit less for employee magazines and public relations
- Belgium uses them slightly less for campaigns and public relations
- Denmark less for print
- Great Britain less for websites and business reports
- Switzerland less regarding campaigns

Company size

- Small companies use agencies more for print, but less for PR
- Medium sized companies use agencies more for business reports and websites, but less for print and campaigns
- Big companies use agencies more for campaigns, employee magazines and public relations, but less for business reports and websites

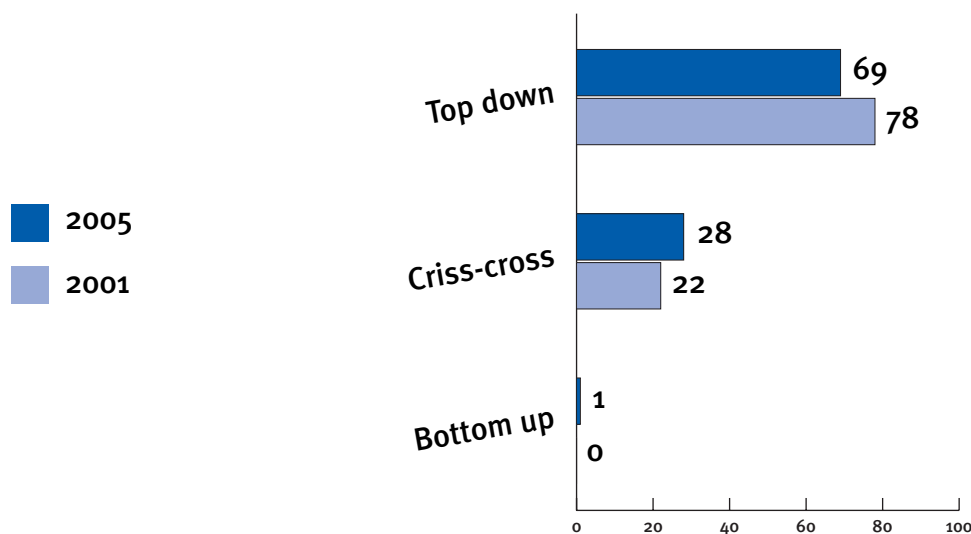
Corporate versus agencies

- While companies use agencies as depicted in the chart, agencies say they are mostly used for magazines (100 per cent), websites (71 per cent), PR (71 per cent), print (64 per cent) and campaigns (57 per cent)

Culture and Behaviour

- The majority of internal communication has remained top down
- Departments are still suffering from silo mentalities
- The company philosophy is more formalised, but less often lived
- The unofficial grapevine plays an important role
- Time for chats has slightly increased – the cafeteria being the preferred place to talk
- Internal communication is losing courage – bullying and delicate topics are less often dealt with

The dominant pattern of internal communication



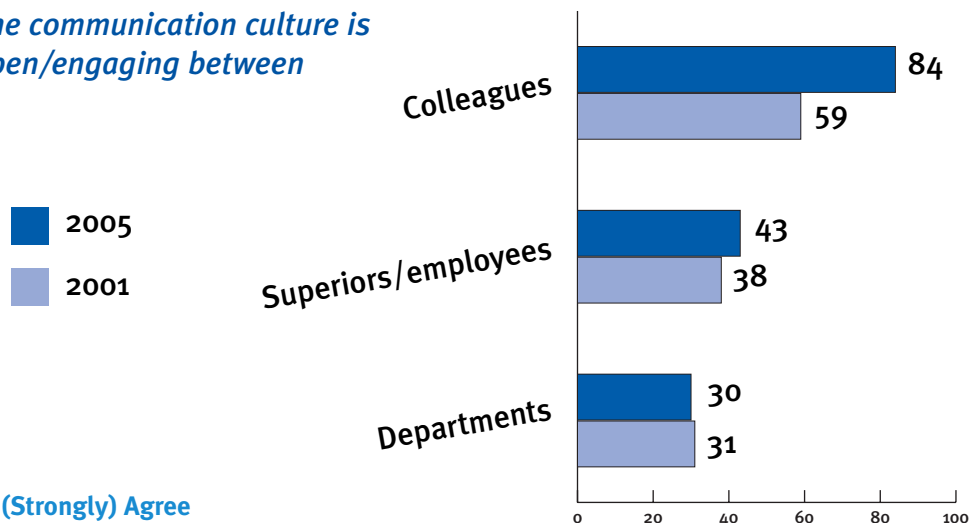
Countries

- Austria (50 per cent), Switzerland (40 per cent) and Belgium (36 per cent) have much more of criss-cross communication than other countries
- The country with the highest percentage of top down communication is Great Britain (90 per cent)

Company size

- Small companies show the highest tendency for top down communication (75 per cent versus 65 per cent in medium sized and 68 per cent in big companies)

The communication culture is open/engaging between



(Strongly) Agree

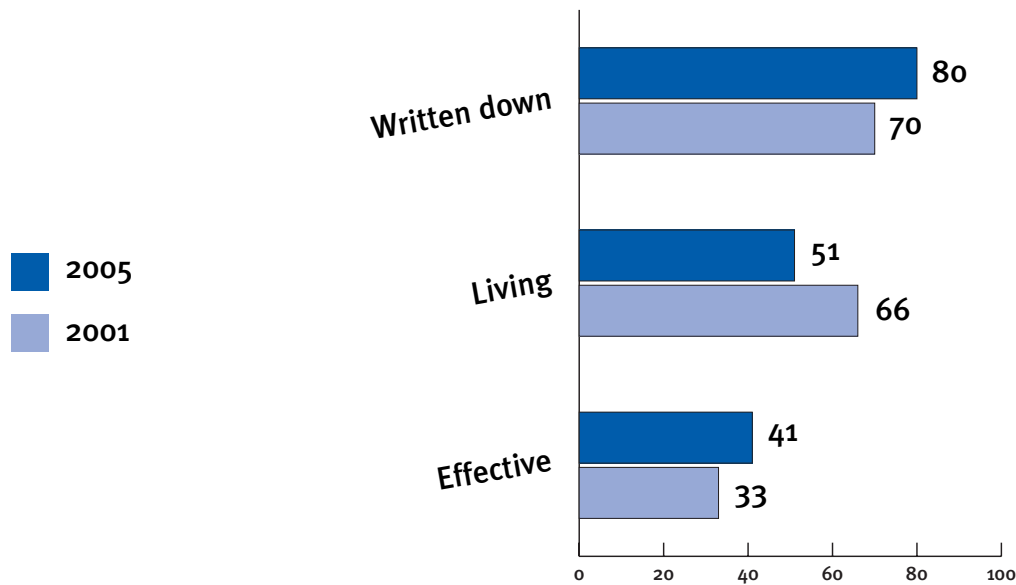
Countries

- ❖ Communication between departments is most open in Austria (50 per cent) and Denmark (43 per cent) – in Switzerland (20 per cent) and Belgium (23 per cent) it is least open
- ❖ Communication between superiors/employees is most open in Austria (67 per cent) – it is least open in Belgium (31 per cent) and Great Britain (32 per cent)
- ❖ Danish people have the most open communication with their colleagues (100 per cent)

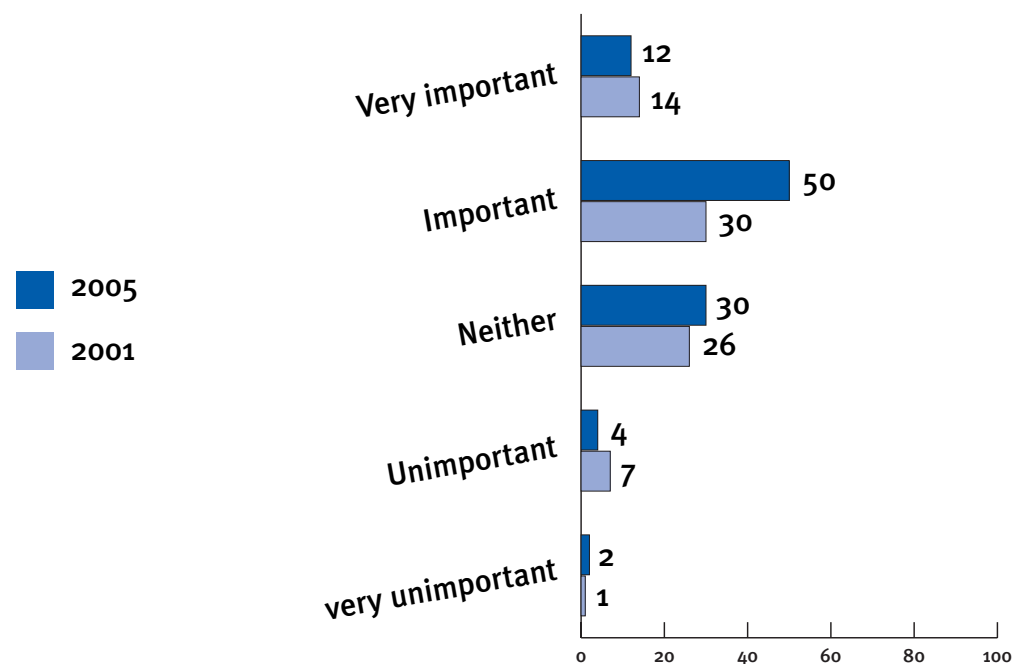
Company size

- ❖ Small companies have the most open communication between superiors/employees (46 per cent versus 38 per cent in medium sized and 39 per cent in big companies)

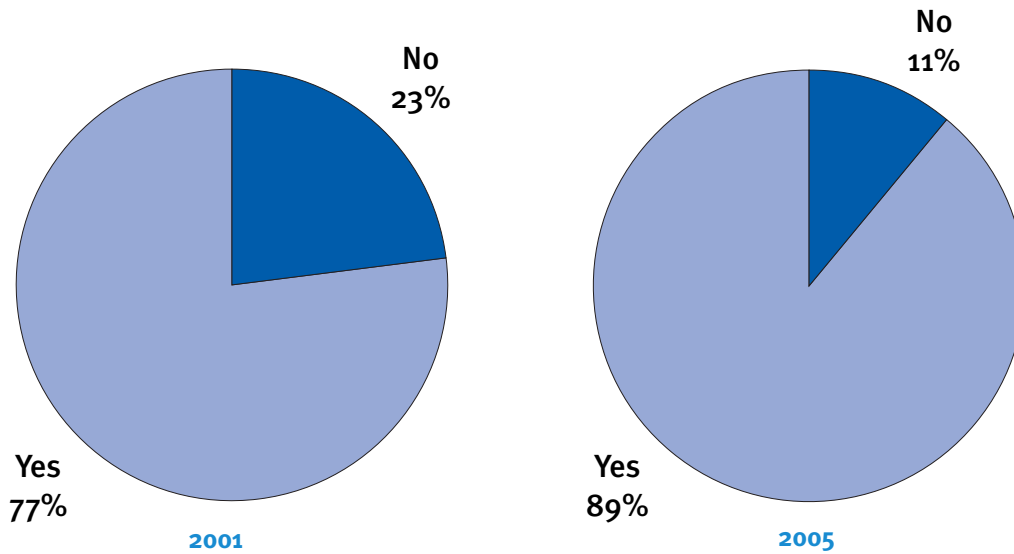
The company philosophy is



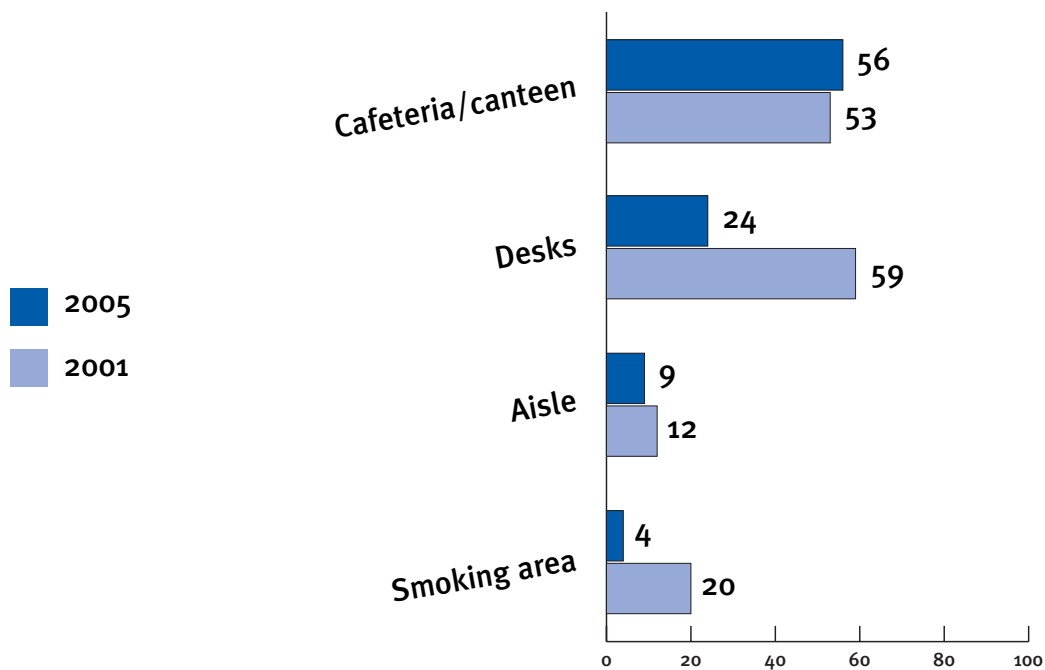
The grapevine is



Employees have time to chat



The best place to have conversations



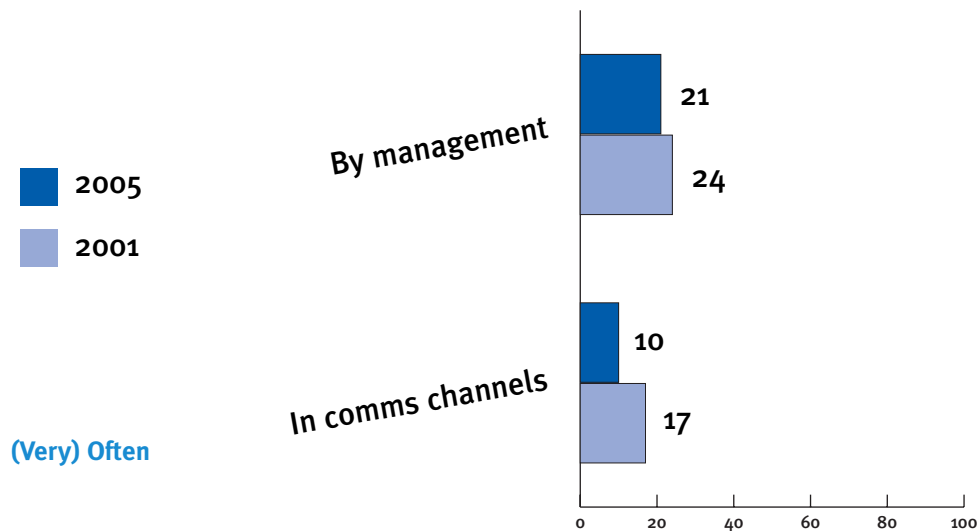
Countries

- In Belgium and Denmark everybody has time to chat – the other countries are in line with the overall results
- Most employees chat in the cafeteria/canteen (56 per cent), although desks are an especially popular place in Denmark (43 per cent) and Great Britain (41 per cent)

Company size

- Medium sized companies say they have least time to chat (85 per cent versus 93 per cent in small and 91 per cent in big companies)
- The bigger the company, the more prominent become conversations at desks

Intimidation/'bad treatment' of colleagues is dealt with



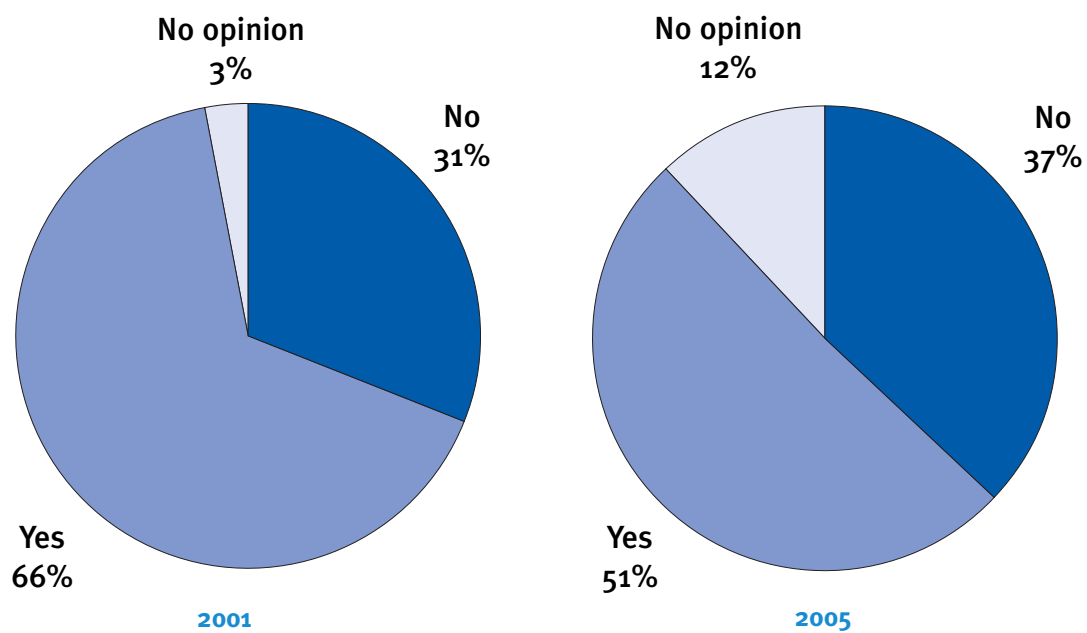
Countries

- In Denmark and Switzerland the issue of bullying is dealt with least often by management and in communication channels – in Belgium 'bad treatment' of colleagues doesn't find its way into communication channels either
- In Great Britain management seems to deal with bullying most often (37 per cent)
- The communication channels in Sweden are the ones that are most often used for dealing with bullying (21 per cent)

Company size

- Big companies deal with bullying most often through management (39 per cent versus 22 per cent in small and 6 per cent in medium sized companies) and in communication channels (21 per cent versus 11 per cent in small and 3 per cent in medium sized companies)

Delicate topics/conflicts can be discussed in internal communication channels



Countries

- Austrian channels are most open to delicate topics (82 per cent)
- Belgian channels are least open (39 per cent)

Company size

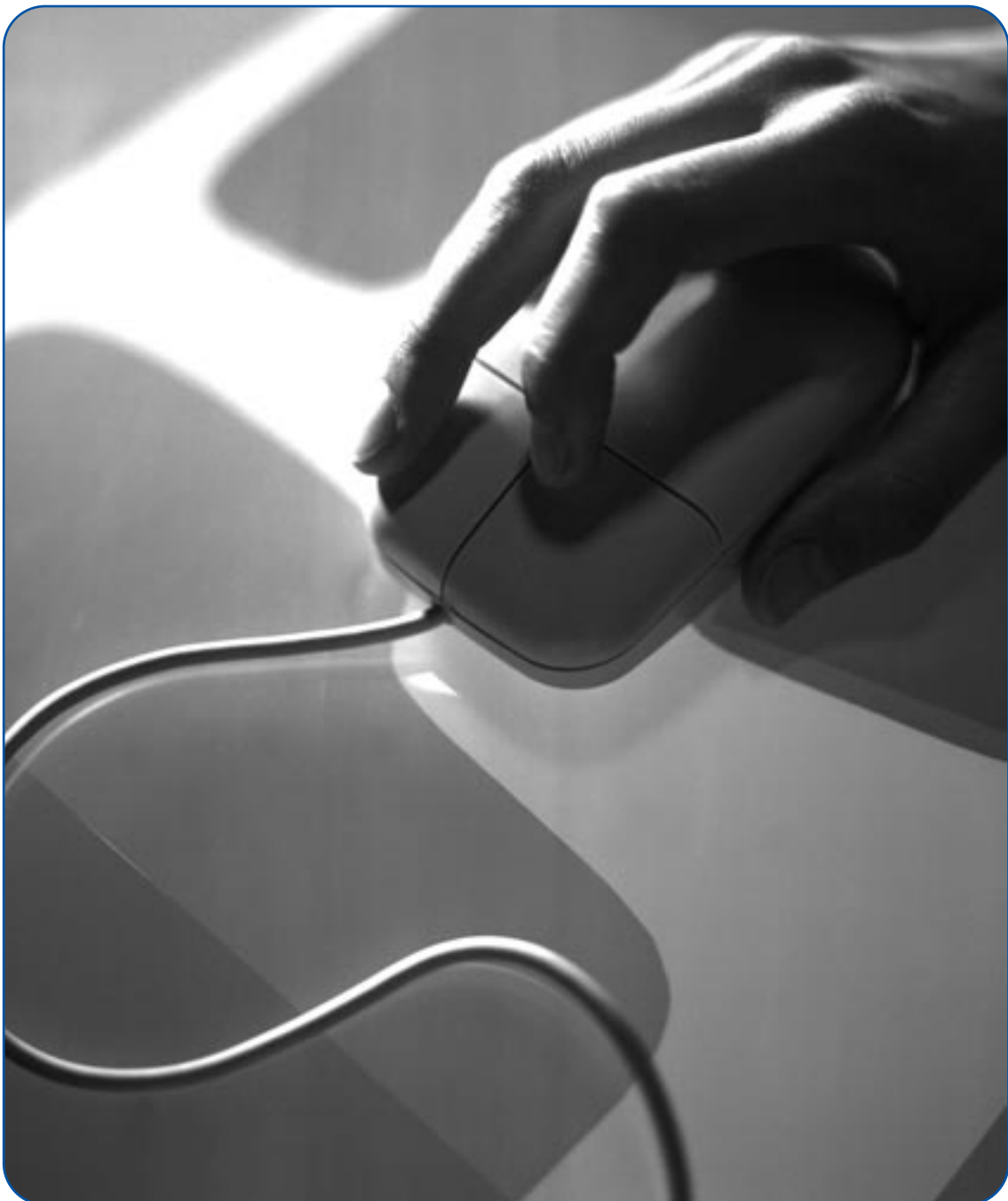
- Small companies are most open (75 per cent)
- Medium sized companies least open (31 per cent)

Corporate versus agencies

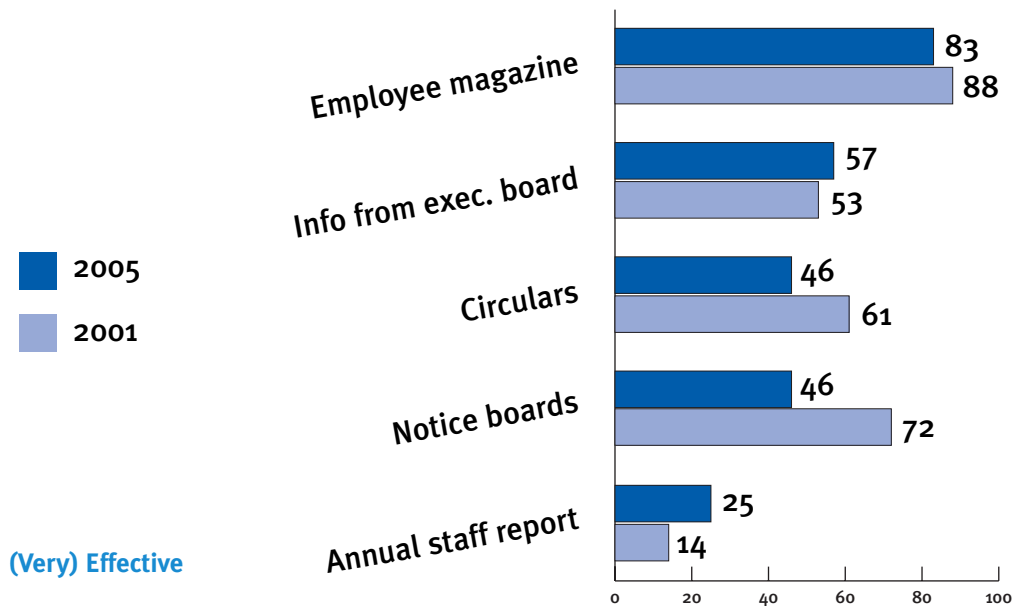
- Agencies see companies as being more open (65 per cent) than the companies see themselves (49 per cent)

Tools and Topicality

- E-mail has caught up with employee magazines regarding effectiveness
- Conferences are scoring highly – against the downwards trend in events
- Stronger direct communication is balancing the use of new information and communication technologies
- The majority of employee magazines are published quarterly or less often, distributed only to employees, and have 12 to 16 pages
- About three quarters of employees have intranet access – about as many areas are represented there
- Two thirds of intranets are updated at least daily
- Urgent information is mainly spread via electronic channels and cascades



Effectiveness of current internal communication channels – print



Countries

- The employee magazine scores highest in Denmark (100 per cent) and lowest in Belgium (67 per cent)
- Denmark does not rate circulars (28 per cent) or notice boards (14 per cent)
- Annual staff reports are popular in Austria (63 per cent), but not in Belgium (16 per cent) or Great Britain (5 per cent)

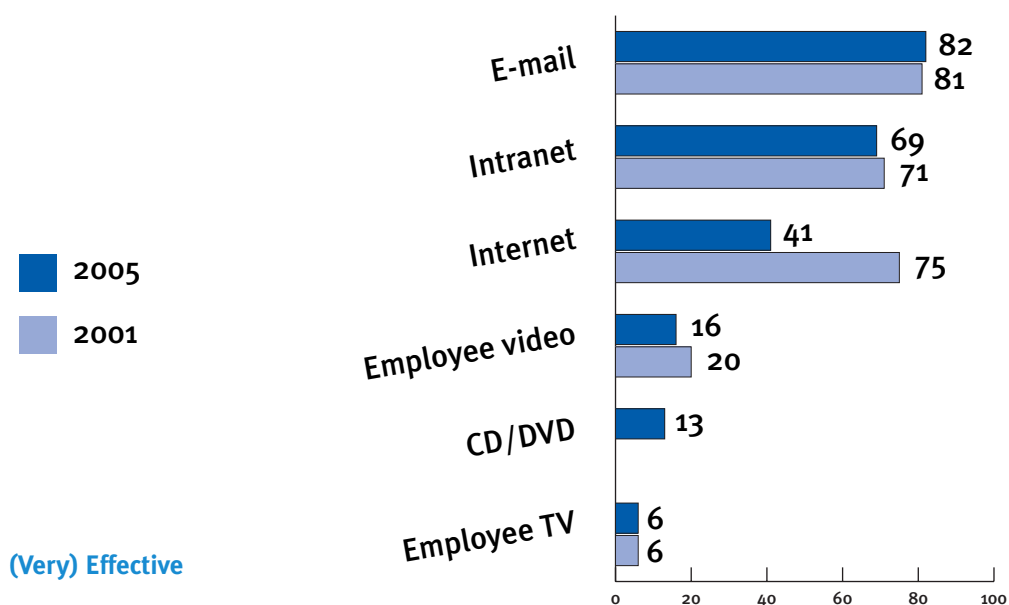
Company size

- Small companies rate employee magazines and circulars less effectively
- Medium sized companies rate annual staff reports, information from the executive board, notice boards and circulars less effectively, but employee magazines more effectively
- Big companies are in line with the overall results

Corporate versus agencies

- While companies are in line with the overall results, agencies see notice boards and information from the executive board as less effective (minus 9 per cent and minus 12 per cent, respectively)

Effectiveness of current internal communication channels – electronic



Countries

- The intranet scores highest in Sweden (85 per cent) and Austria (83 per cent) and lowest in Great Britain (32 per cent) where the internet scores very badly too (5 per cent) – the latter scores also badly in Belgium (16 per cent)
- Great Britain is fond of employee videos (32 per cent), while the contrary is the case for Denmark where nobody rates TV and CDs/DVDs as effective communication channels

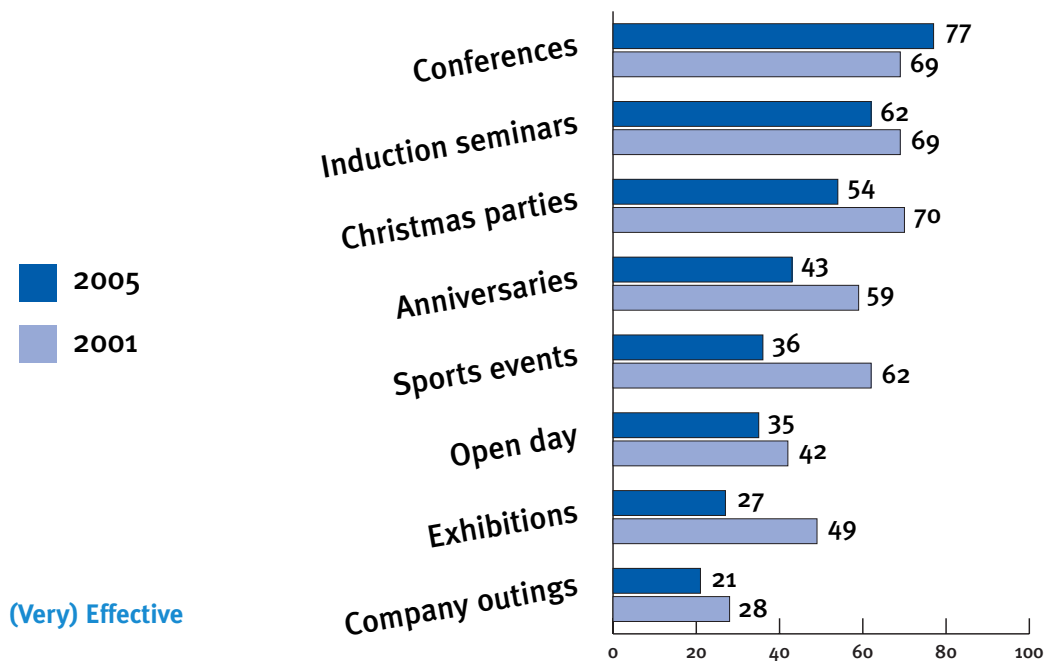
Company size

- Small companies see electronic communication as slightly less effective
- Medium sized companies are in line with the general results
- Big companies see the intranet, video/TV and CDs/DVDs as slightly more effective

Corporate versus agencies

- Agencies rate the internet (plus 17 per cent), videos (plus 12 per cent), TV (plus 18 per cent) and CDs/DVDs (plus 15 per cent) more effective than companies

Effectiveness of internal communication channels – events



(Very) Effective

Countries

- Austria and Switzerland rate events as generally more effective
- Great Britain, Belgium, Sweden and Denmark see them as generally less effective

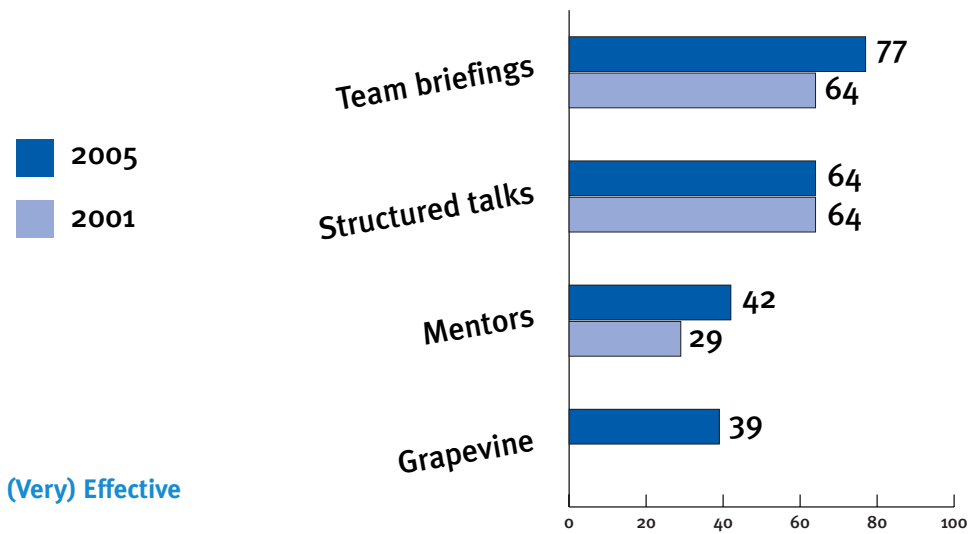
Company size

- Small companies are slightly more convinced about the effectiveness of events
- Medium sized companies are in line with the overall results
- Big companies are slightly less convinced regarding the effectiveness of events, but strongly in favour of conferences

Corporate versus agencies

- Agencies assess events as generally more effective (plus 5 to 10 per cent) than companies – only induction is rated less effectively than by companies (minus 18 per cent)

Effectiveness of current internal communication channels – direct communication



Countries

- ❖ Denmark favours team briefings (86 per cent) and structured talks (72 per cent) the most
- ❖ Switzerland rates team briefings (40 per cent) and mentoring (0 per cent) least effectively

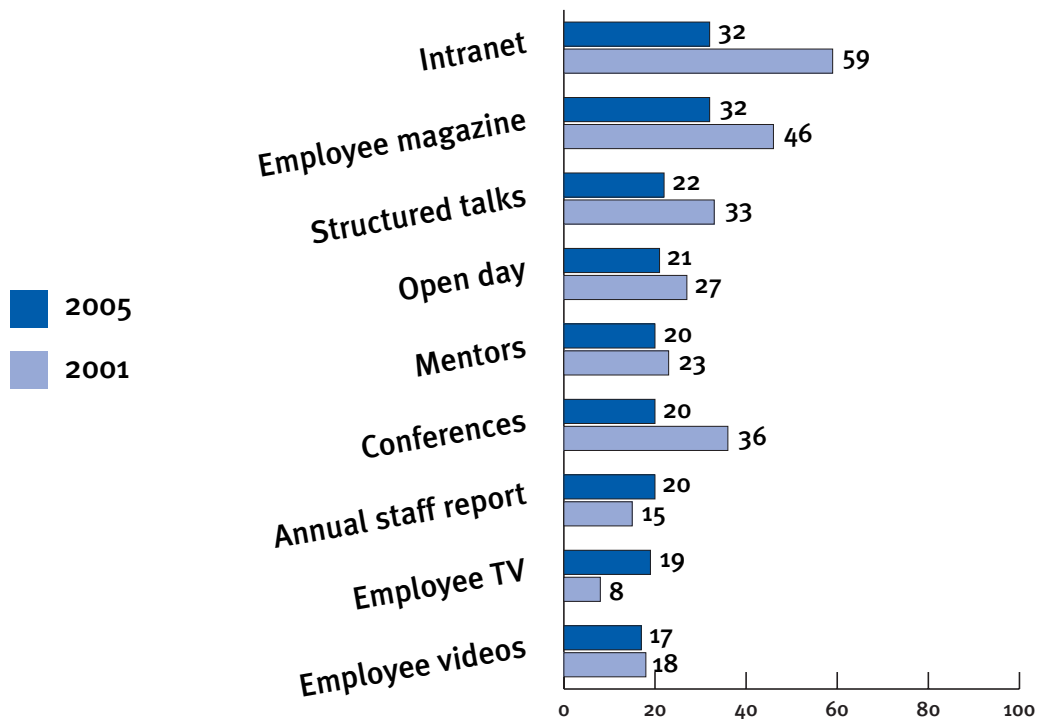
Company size

- ❖ Big companies value team briefings (83 per cent) and structured talks (69 per cent) the most
- ❖ Medium sized companies rate them least effectively (62 per cent and 51 per cent, respectively)

Corporate versus agencies

- ❖ Agencies rate team briefings (plus 21 per cent), structured talks (plus 11 per cent) and mentors (plus 25 per cent) more effectively than companies

Planned introduction of internal communication tools



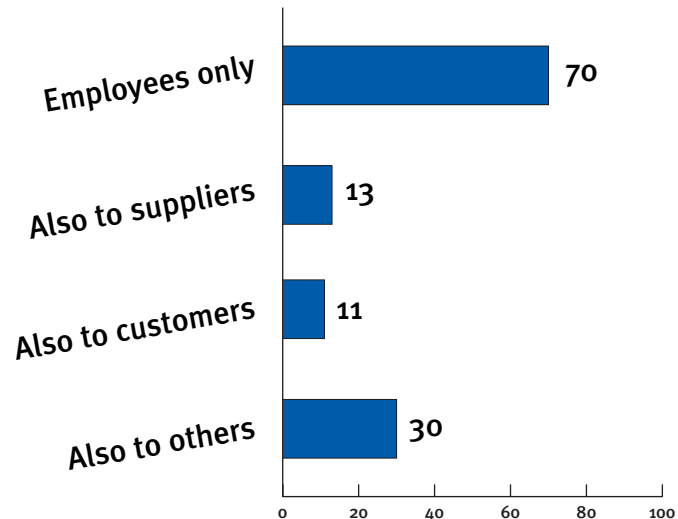
Company size

- ❖ Small companies plan to introduce annual staff reports and intranets most often
- ❖ Medium sized companies are going for structured talks, information from the executive board, employee videos and conferences
- ❖ Big companies are planning mainly inductions, mentors and intranets

Corporate versus agencies

- ❖ Corporates plan mainly intranets (33 per cent)
- ❖ Agencies say that their clients plan mostly magazines (55 per cent)

The employee magazine is distributed to



- ❖ Other audiences that receive employee magazines are retired employees, board of directors, visitors, media, and other companies

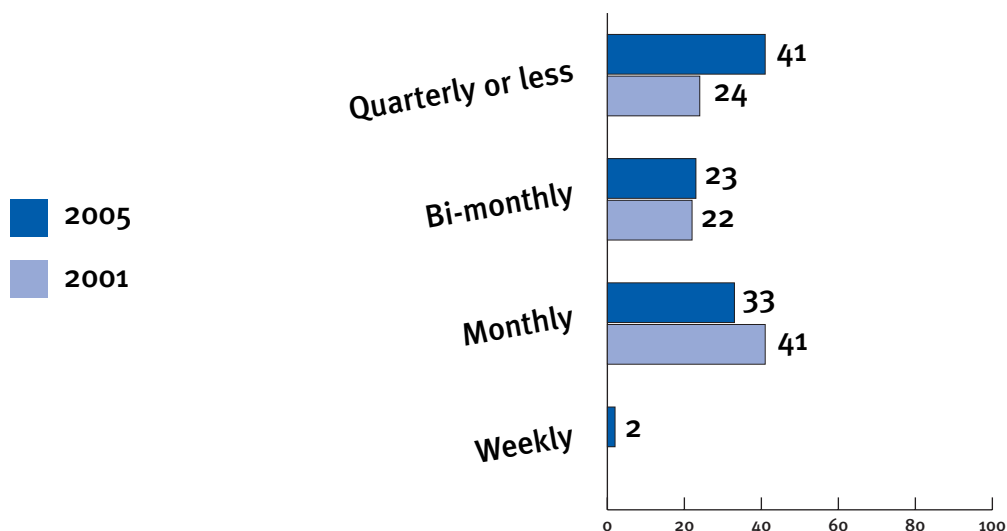
Countries

- ❖ Sweden distributes employee magazines to many people other than employees (only 59 per cent go to employees only)
- ❖ Switzerland distributes them mostly to employees only

Company size

- ❖ Medium sized companies distribute employee magazines most widely (65 per cent distribute them to employees only versus 76 per cent in small and 71 per cent in big companies)

The employee magazine is issued



Countries

- In Great Britain (44 per cent), Denmark (43 per cent), Belgium (42 per cent) and Sweden (42 per cent) employee magazines are issued mostly monthly
- Switzerland and Austria issues employee magazines mostly quarterly or less often

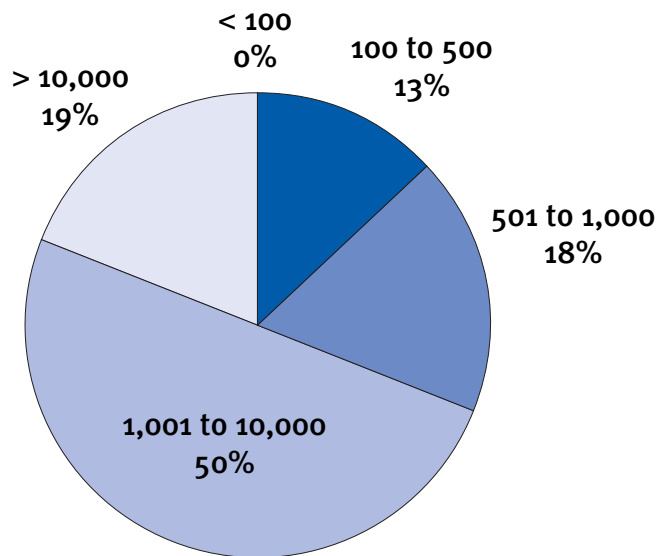
Company size

- Small companies issue employee magazines mostly quarterly or less (64 per cent)
- Medium sized companies quarterly or less (37 per cent) or bi-monthly (34 per cent)
- Big companies issue employee magazines mostly monthly (62 per cent) – only 24 per cent issue it quarterly or less often

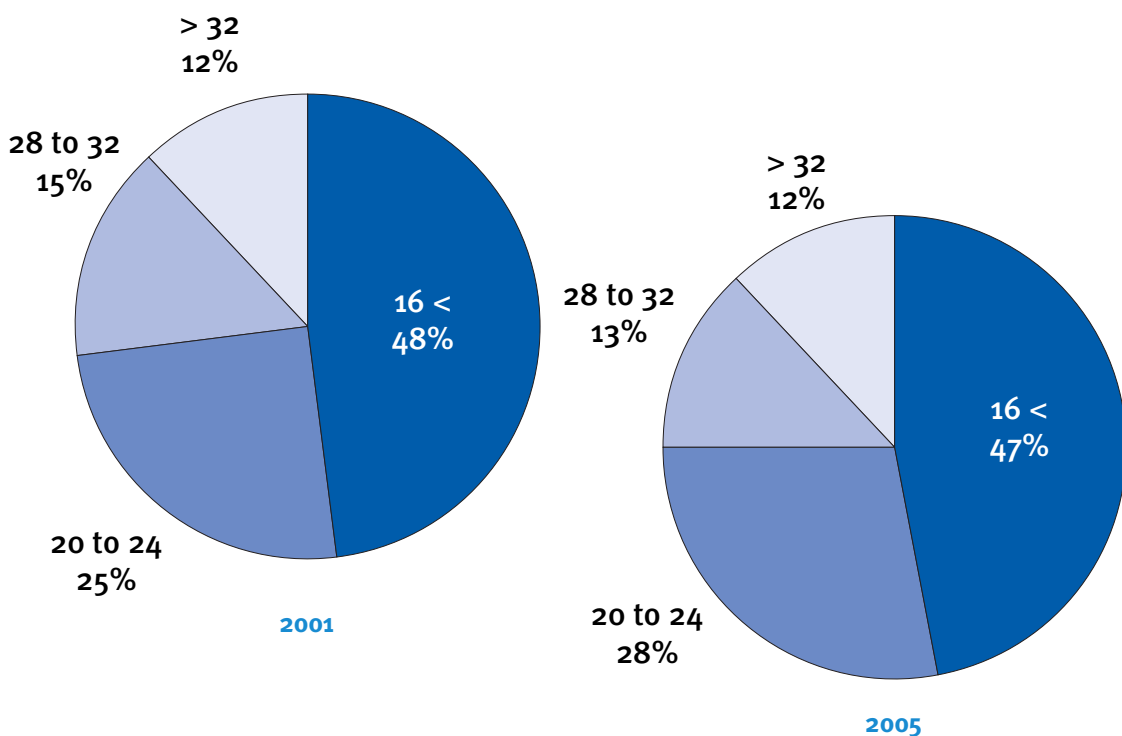
Corporate versus agencies

- Agencies say their clients issue employee magazines mostly quarterly or less often

Number of copies of employee magazines distributed



Number of pages of employee magazines



Countries

- Employee magazines in Denmark, Great Britain, Sweden and Switzerland have mostly 12 to 16 pages
- Belgium's employee magazines consist mainly of 20 to 32 pages
- Austria beats all other countries regarding volume – the majority (33 per cent) of all employee magazines have more than 32 pages

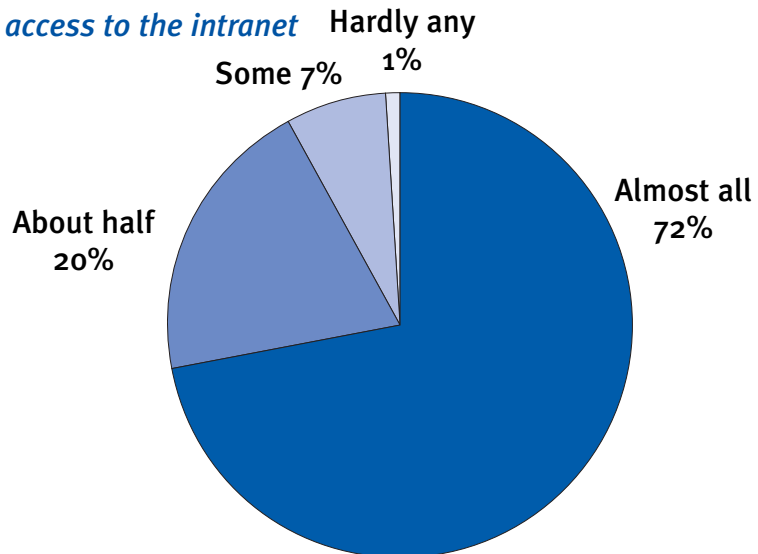
Company size

- Big companies show the widest variety regarding number of pages
- Small and medium sized companies have mostly 12 to 16 pages

Corporate versus agencies

- Agencies produce mostly employee magazines with 20 to 24 pages

Number of employees with access to the intranet



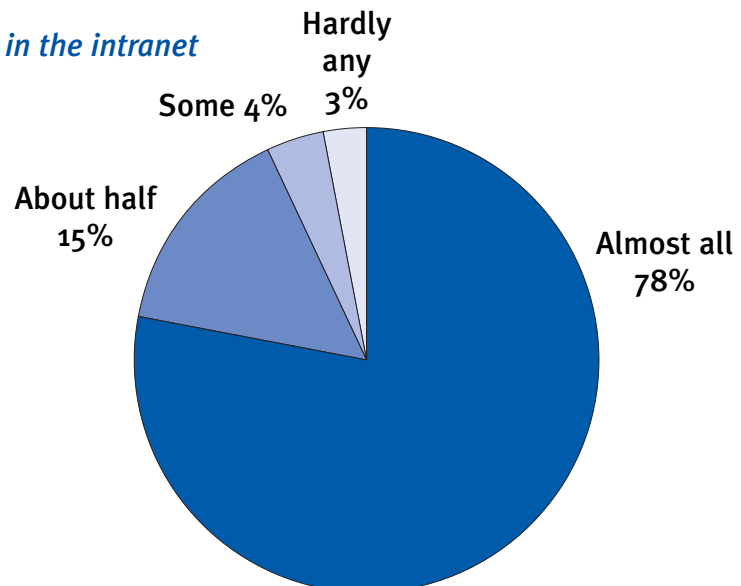
Countries

- Austria (83 per cent) and Switzerland (80 per cent) have the highest number of employees with intranet access
- Great Britain (56 per cent) and Belgium (50 per cent) have the lowest number of employees with intranet access

Company size

- Small companies have the highest number of employees with intranet access (83 per cent)
- Big companies have the lowest percentage of employees with intranet access (52 per cent)

Number of areas represented in the intranet



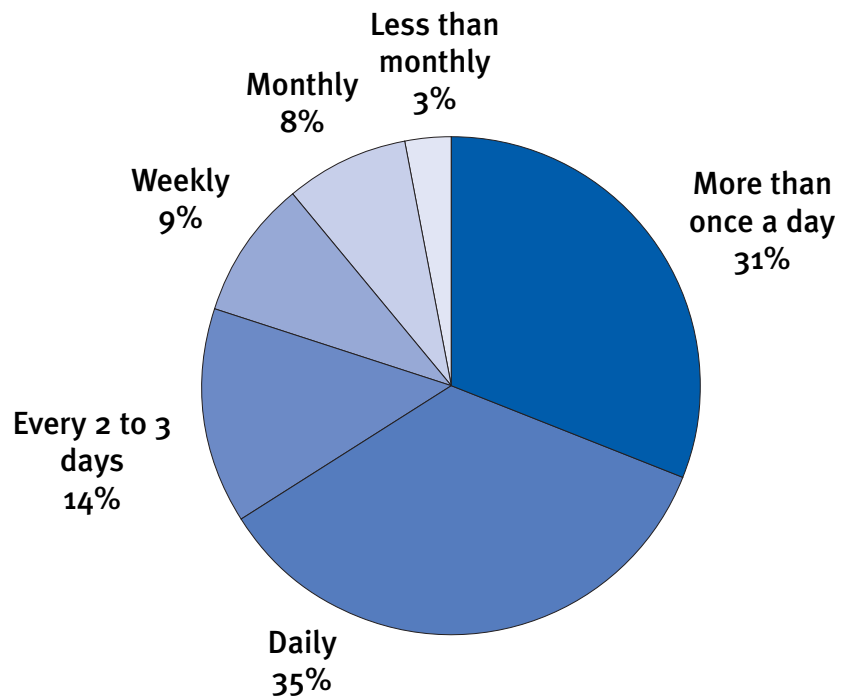
Countries

- Switzerland (100 per cent), Denmark (86 per cent) and Austria (83 per cent) have most areas represented on their intranets
- In Belgium, the fewest areas are represented on their intranets (60 per cent)

Company size

- Small companies have most areas represented on their intranets (96 per cent)
- Medium sized companies have the least areas represented (59 per cent)

Frequency of updates of the intranet



Countries

- Switzerland, Denmark and Sweden update their intranets most frequently (85 per cent or more update it daily or more)
- Belgium and Austria update it least frequently (40 per cent and 50 per cent, respectively update it daily or more)

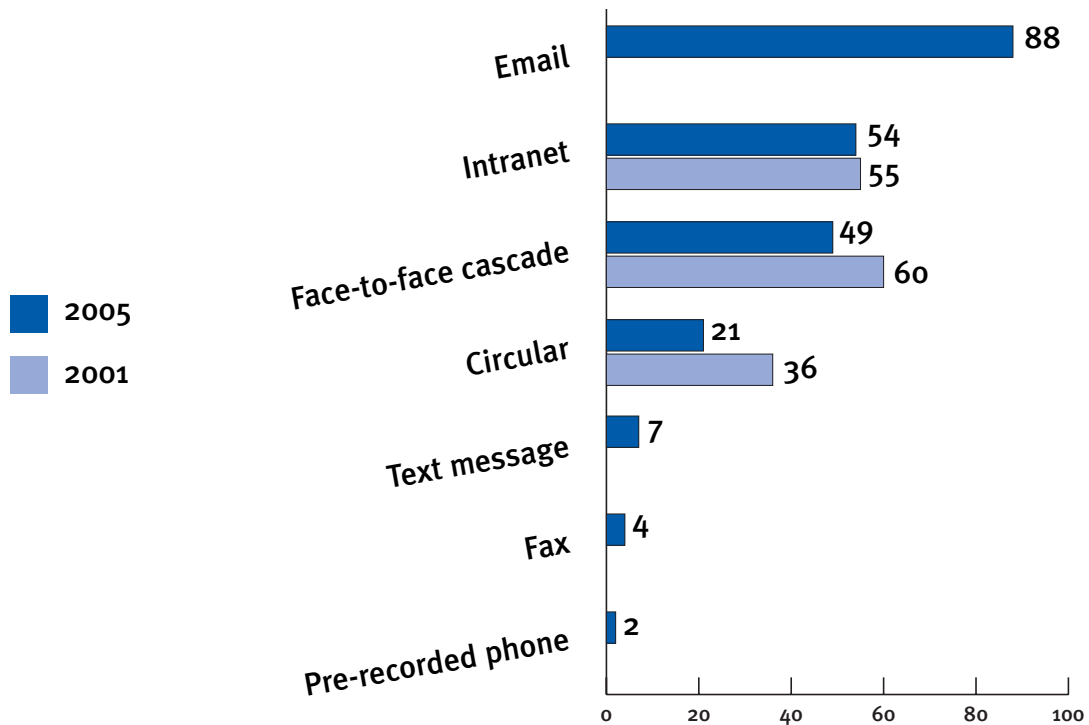
Company size

- Small and medium sized companies update it most frequently (70 per cent or more update it daily or more)

Corporate versus agencies

- Agencies are less optimistic regarding the frequency of updating (45 per cent say their clients update their intranets daily or more versus 69 per cent on the corporate side who are of this opinion)

Channels used for urgent information/communication



Countries

- Email is number one in all countries for urgent information/communication – apart from Denmark where the intranet is used more frequently
- Great Britain and Austria rank face-to-face cascades second, Switzerland the circular

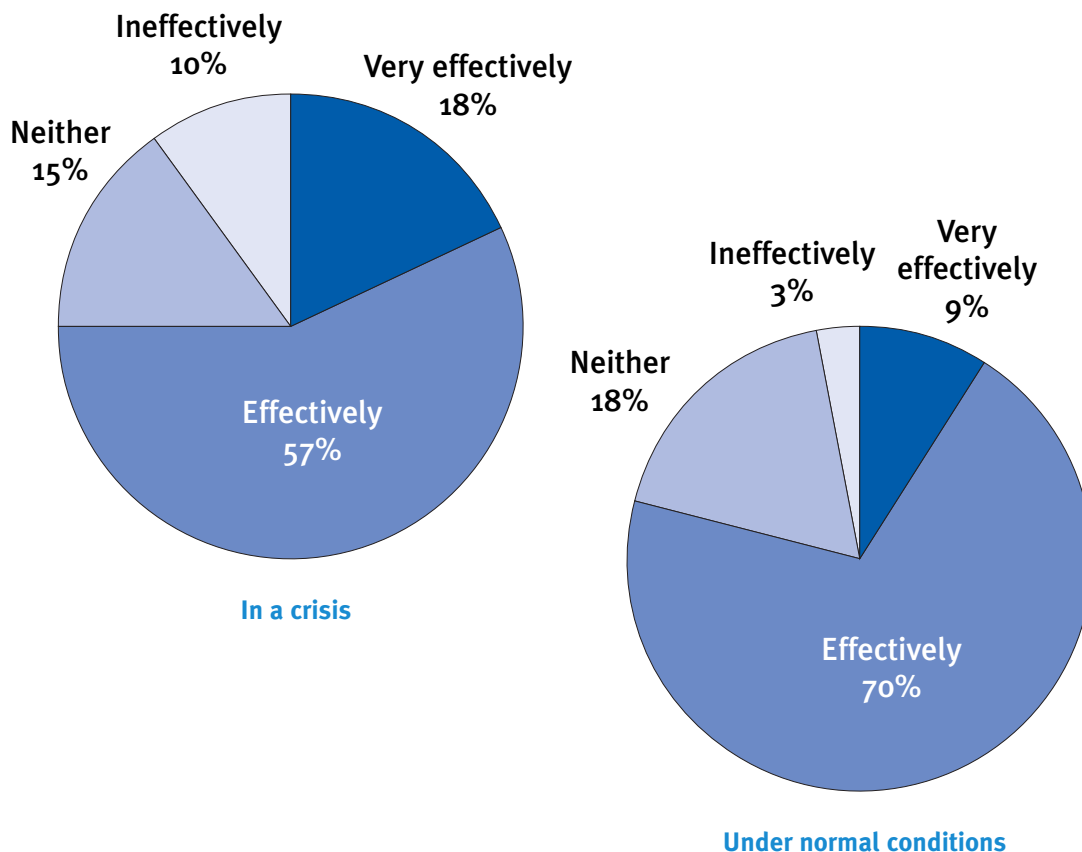
Company size

- Small companies rely mainly on email and face-to-face cascades
- Medium sized companies use mainly email and the intranet
- Big companies rely mostly on email and use face-to-face cascades/the intranet in a balanced way

Measurement and Evaluation

- About three quarters think they communicate effectively – under normal conditions as well as in a crisis
- Less than two thirds use defined goals to evaluate internal communication success
- Nine in ten do some sort of evaluation at least sometimes

Effectiveness of communication with key audiences



Countries

- Almost everyone in Austria and Denmark thinks that they are communicating (very) effectively under normal conditions – Great Britain and Switzerland are least convinced about doing so (63 per cent and 60 per cent, respectively)
- Switzerland, Denmark and Sweden are most convinced about their communication effectiveness in a crisis – Austria and Belgium are least convinced about that (63 per cent and 62 per cent, respectively)

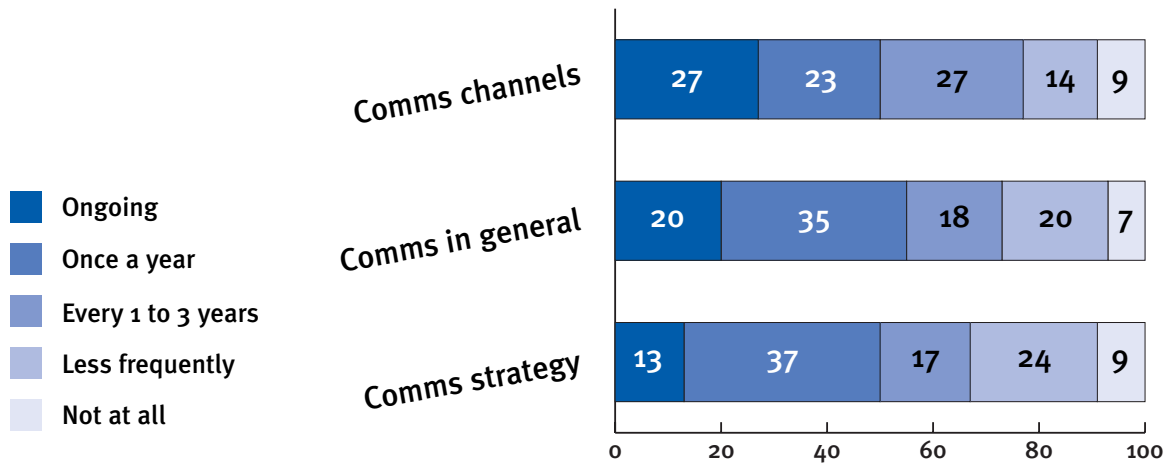
Company size

- Big companies think they are best in communicating in a crisis (82 per cent)
- Middle sized companies think they are worst in communicating in a crisis (68 per cent)

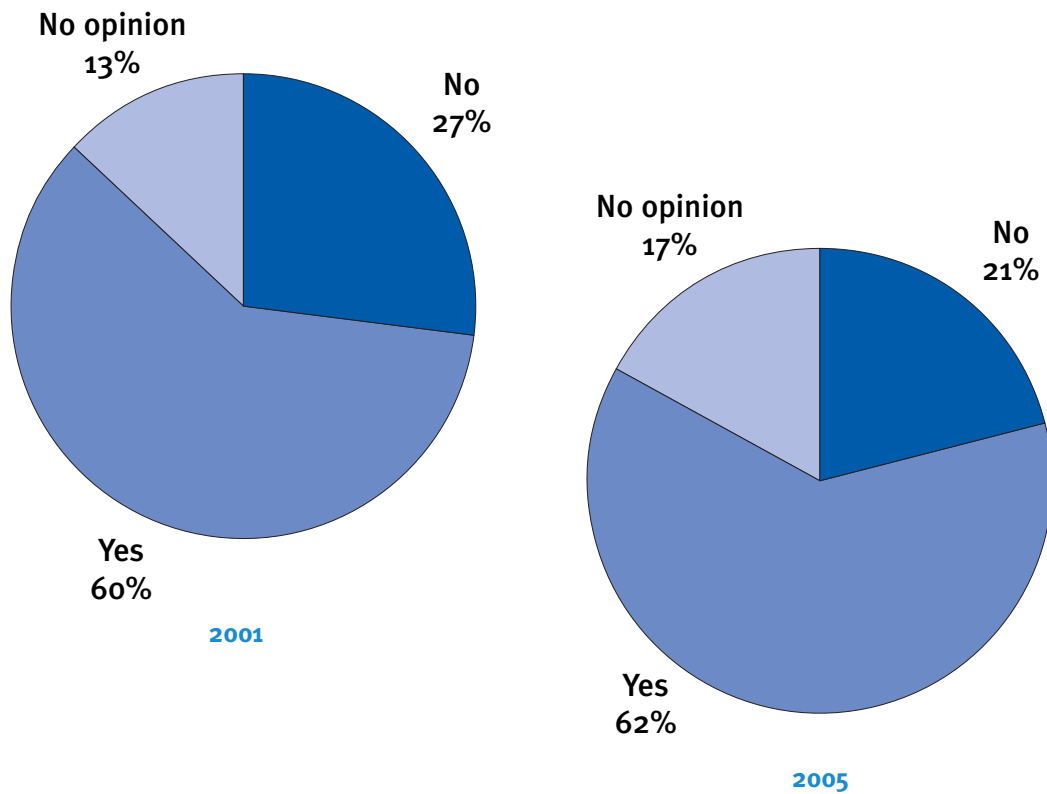
Corporate versus agencies

- Agencies are less optimistic regarding the efficiency of their clients' communication in a crisis (50 per cent versus 74 per cent who are of that opinion on the corporate side)

Frequency of evaluation of internal communication regarding



Defined goals are used to evaluate communication success



Countries

- Great Britain is the country where goals are used most widely (95 per cent) to evaluate communication success
- Switzerland (0 per cent), Belgium (54 per cent), Denmark (57 per cent) and Austria (58 per cent) score lowest in this respect

Company size

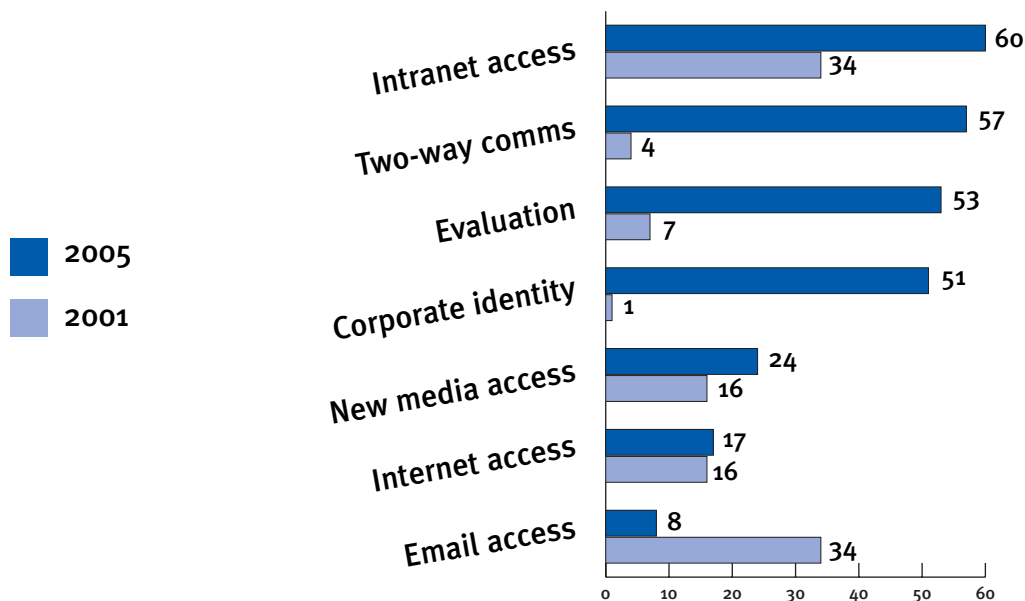
- The bigger the companies, the more they use defined goals (74 per cent versus 54 per cent in small and 64 per cent in medium sized companies)

The Future

- Future focus on increased intranet access, two-way communication, evaluation and corporate identity
- Less fears and hopes regarding new information and communication technologies
- The majority still believe in the increasing importance of internal communication
- Only slight optimism regarding increased budgets for internal communication
- Internal communication jobs have become less secure



Specific future projects for internal communication



Countries

- Austria will focus on evaluation (64 per cent) as a future project
- Intranets and two-way communication are top priorities for Denmark, Great Britain, Sweden and Switzerland

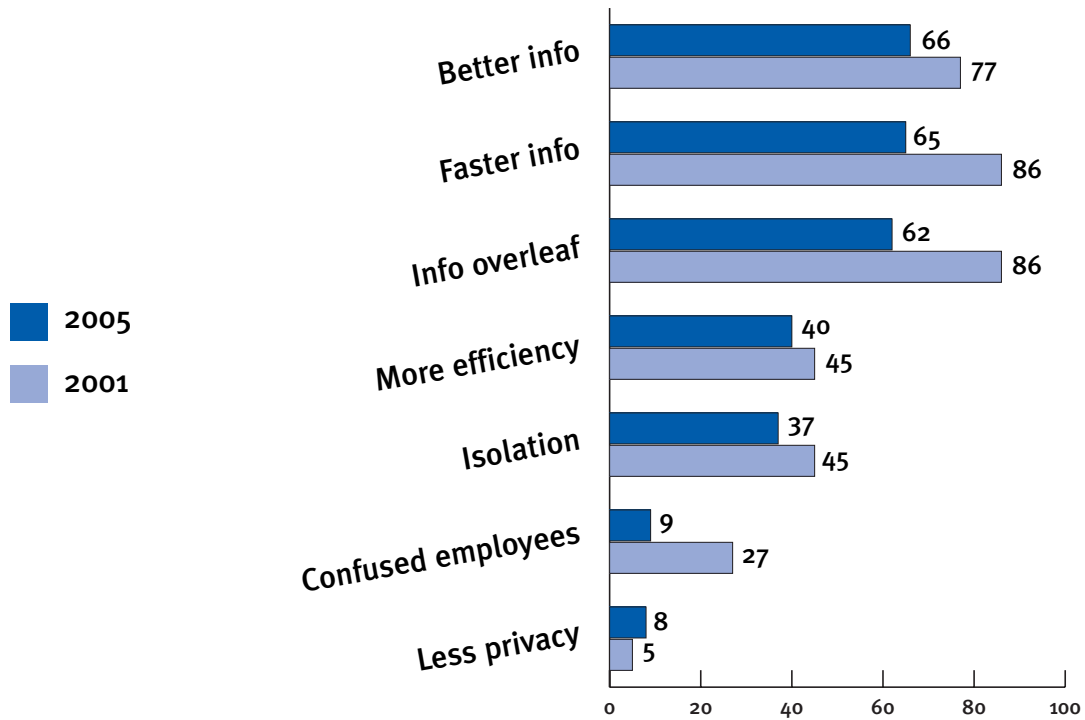
Company size

- Small and big companies will try to improve evaluation and two-way communication
- Medium sized companies focus on intranets and two-way communication

Corporate versus agencies

- While companies rank evaluation as a top future project, agencies see corporate identity scoring highest

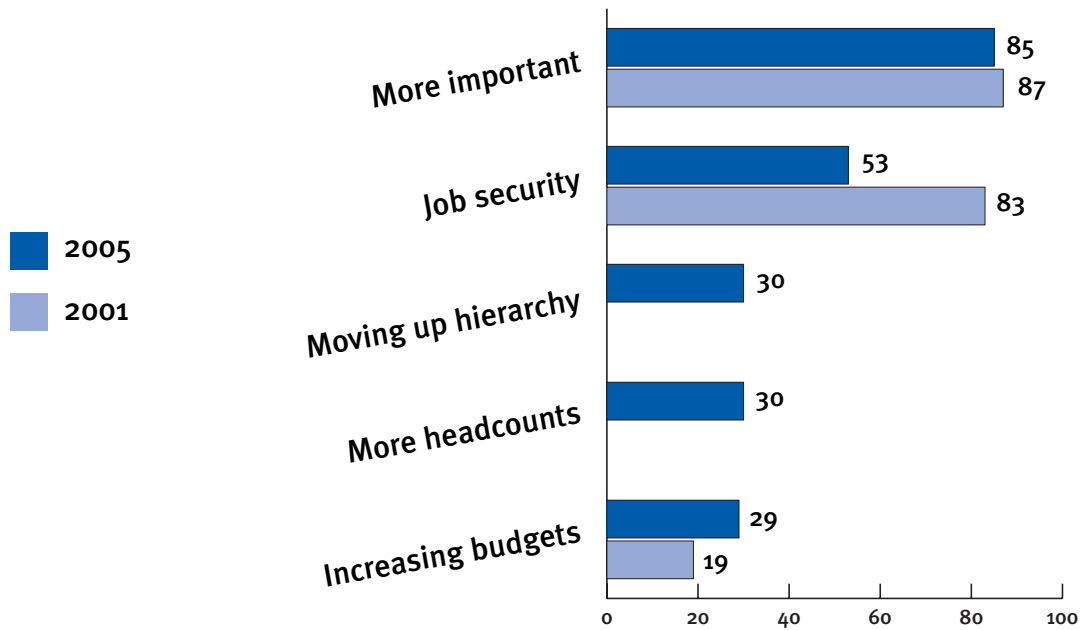
(Dis)Advantages of the future use of new information technologies



Countries, company size, corporate versus agencies

❖ All rank ‘better informed’, ‘faster informed’ and ‘information overload’ as the first three – the only difference is the order in which those three (dis)advantages are ranked

The future of internal communication in your company



Countries

- 95 per cent in Sweden think that internal communication will become even more important – in Belgium only 75 per cent are of that opinion
- Switzerland, Belgium and Sweden are most optimistic regarding job security (80 per cent, 67 per cent and 65 per cent, respectively) – Great Britain and Denmark are least optimistic (37 per cent and 43 per cent, respectively)
- Belgium is the country that believes most in moving up the hierarchy and in increasing budgets
- The Danes doubt hierarchical improvements the most (14 per cent)
- Switzerland is the least optimistic regarding budget and headcounts

Company size

- Small and big companies are least optimistic regarding hierarchical improvements (22 per cent and 23 per cent, respectively versus 41 per cent in medium sized companies)
- Medium sized companies are also most optimistic regarding budget (44 per cent) and headcounts (38 per cent)
- Big companies are most skeptical regarding job security (46 per cent versus 54 per cent in small and 52 per cent in medium sized companies)

Corporate versus agencies

- Agencies are much more skeptical regarding budgets (6 per cent versus 33 per cent in the corporate world) and job security (38 per cent versus 55 per cent in companies)

Summary

- **Communication is regarded as key success factor**
- **Significant room for improvement regarding strategic aspects of internal communication**
- **Direct communication is catching up with the information and communication technology hype of the past years**
- **The male:female ratio is now more balanced**
- **The main key to internal communication success: commitment to communication**

About the Author of the Study

Dr Carola Golser-Wamser, Senior Consultant, Trident Communications, has a PhD from Salzburg University where she taught Industrial Communications and conducted research within Business Communications, Integrated Communications and Evaluation. She currently is a Senior Consultant for Trident Communications.

Carola was the author of *Internal Communication in Europe* published by FEIEA in 2001. She has worked with industry in Germany and Austria on communication and marketing projects and has a background in publication management.

In both 1999 and 2001 she was awarded a medal from the Austrian Institute of Public Relations for her work on communication research and has worked on evaluation, strategy, organisational culture development, employee engagement, consulting, and corporate events projects for clients including Allen & Overy, BP, Gallaher, National Australia Bank Group, Pilkington, Pfizer, Severn Trent Water, SixContinentsRetail, Smiths Aerospace Systems, Tarmac, and the UK Government. Carola is a member of communication organisations in the UK (CiB), Germany (DPRG) and Austria (Vikom) and speaks fluent German, Italian and English.

About Trident Communications

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