2026
WORKFORCE TRENDS REPORT SERIES

Employee Communications Report

Featuring findings and insights from the State of the Sector 2025/26 survey

GLOBAL EDITION

Gallagher

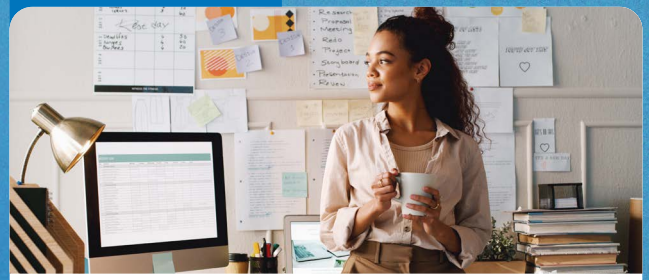
Insurance | Risk Management | Consulting

What's in this year's report

SECTION ONE

Welcome to the Employee Communications Report

SECTION TWO



Setting the scene: The Readiness Gap

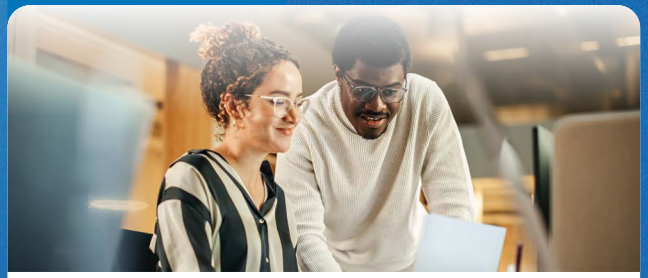
In this section we examine the different ways organizations are feeling the Readiness Gap today.

SECTION THREE

Readiness in action

Explore what readiness looks like across different aspects of the organization.

SECTION FOUR



Conclusion

Actions to take towards closing your Readiness Gap.

Being ready for a future that changes fast

Eighteen years on, State of the Sector remains the industry's most trusted benchmark for internal communications and employee experience. This year, communicators from across the globe shared their insights. Thank you. Your perspectives help us tell the real story of what's happening in our industry.

Today, navigating volatility is the very foundation of our profession. Constant change is becoming the new normal with economic pressures, shifting workforce expectations, and rapid advances in technology redefining how organizations operate. Communicators acting as strategic partners with their organizations are on the front line of this transformation, helping to mitigate perceived risks of low leader trust, burnout, and overload.

However, we must acknowledge reality: some aspects of this transformation—such as structural governance or enterprise-wide technology decisions—are outside the communicator's direct control. The most meaningful progress is happening in the areas we *can* influence: building credibility, creating and sharing strategy, and providing strong governance and visibility into how communication drives business outcomes. These are the levers that shift the perception of IC from "administrative" to "strategic."

This year's findings reveal that strategic maturity continues to be one of the strongest predictors of success. Functions with a well-socialized strategy—one that their people understand and act on—are more likely to reduce the impact of significant risk, exceed their performance targets, and reported greater influence within their organization.

A defining example of strategic maturity is the strength and clarity of an organization's Employee Value Proposition (EVP). As talent markets tighten, employees—especially those in critical roles—have more choice and higher expectations. Successful teams treat the EVP as a strategic asset: they base it on employee listening, bring it to life through everyday communication, and use it to guide decisions about culture and their employee experience.

While AI use continues to grow, many teams are not realizing its full potential. Those with no governance are stuck only using AI for basic tasks, while those with formal governance (active leader support and practical guidance) are much more likely to use AI to enable smarter workflows, roles, and structures. This gap between potential and practice is widening, reinforcing a simple truth: technology only creates value when guided by strategy and governance.

In this year's report, we're examining the different ways organizations are navigating a comms landscape dominated by change and how you can build a more prepared, more strategic function—one that doesn't just survive the future, but helps drive it.

Priorities for 2026

The challenge for 2026 is not necessarily knowing what to do—it's doing it consistently and at scale. This year's findings point to four interconnected priorities that define success for communicators.

1. **Clarity and direction**
   We should strive to embed comms strategy into broader business planning. A simple, effective comms strategy enables people to better understand where the organization is going and why.

2. **Workforce readiness**
   We must equip both communicators and employees with the skills, tools, and confidence to navigate change. Readiness for change is not optional; it's a competitive advantage.

3. **Operational enablement**
   Streamlining governance and processes is key to enabling agility without sacrificing consistency. Mature teams are moving beyond activity metrics to focus on outcomes and impact.

4. **Human-centric communication**
   We need to treat employees with the same sophistication and clarity we expect in great customer experiences. Personalization, relevance, and accessibility aren't "nice to have"—they're essential for building engagement and trust.

Thank you for joining us on this journey. I hope these insights inspire you to challenge assumptions, elevate your practice, and unlock the full value of communication in your organization.

Ben Reynolds
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Global Communication Consulting & Talent UK, Gallagher

Join the conversation
Share your insights on this year's results by tagging us on LinkedIn and using the hashtag **#StateOfTheSector2026**

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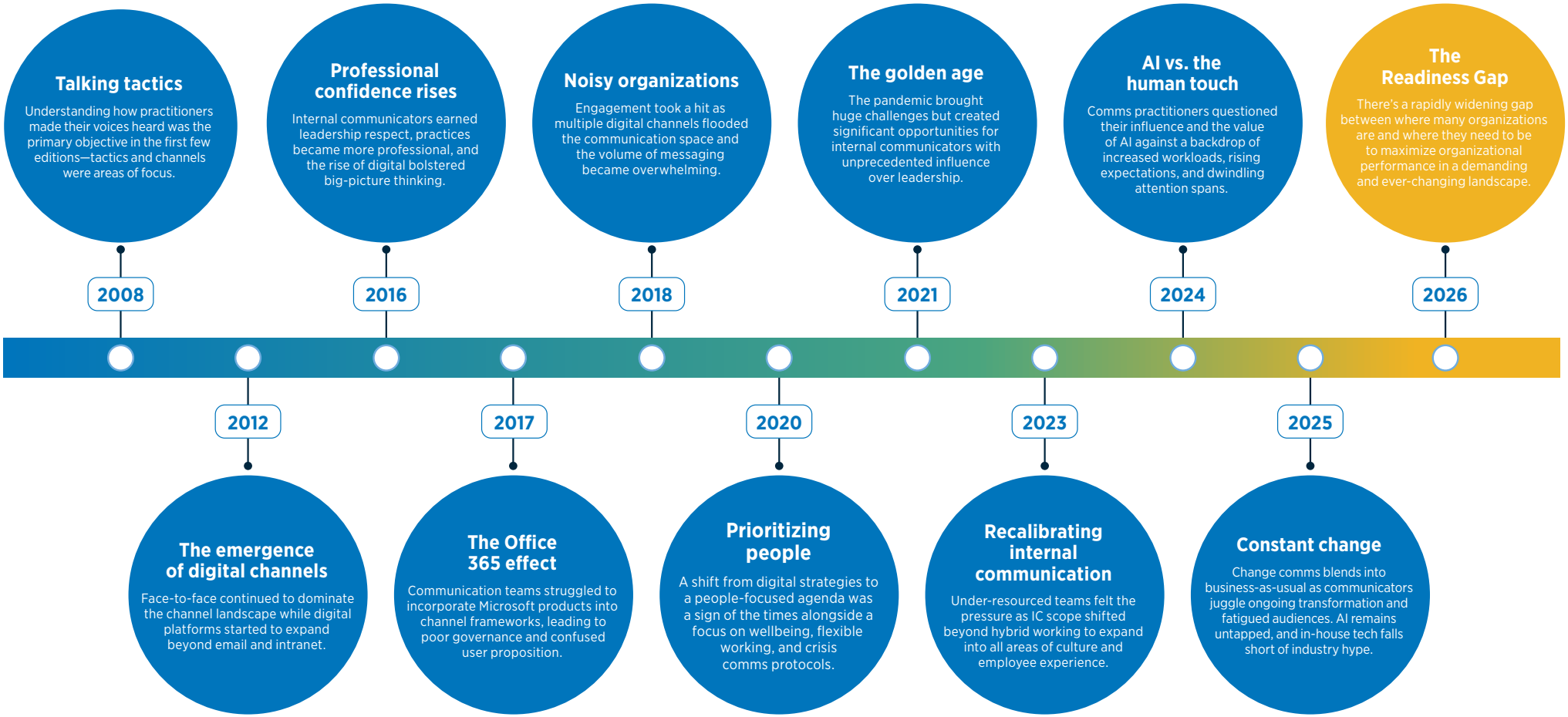
Institute of Internal Communication

SECTION ONE

18 years of insights

Since 2008, the State of the Sector has painted a fascinating picture of the evolution of the internal communication and employee experience landscape.



Who responded?

We ran the survey, roundtables, and focus groups, from September to November 2025.
More than 1,300 Comms and HR professionals took part from all over the world.

51% North America
45% United States
6% Canada

36% UK & Europe
28% United Kingdom
8% Europe

2% Latin America

9% Australia & New Zealand

2% Asia, Africa, Middle East

Industries represented

22%	Public, Health & NGO
13%	Finance & Prof Services
7%	Consumer & Retail
6%	Tech & Media
6%	Energy, Resources & Built Env
6%	Industrial & Mfg
3%	Logistics & Transport
2%	Pharma & Life Sciences

Organization size

36%	<500 employees (small)
17%	500-1,499 employees (medium)
18%	1,500-4,999 employees (large)
9%	5,000-9,999 employees (very large)
20%	10,000+ employees (enterprise)

By generation

5%	Gen-Z
36%	Millennial
47%	Gen X
10%	Boomer

By seniority

6%	Executive / C-Suite
30%	Senior Leader / Director
35%	Manager / Lead
18%	Comms Specialist / Analyst
7%	Support / Coordinator

40 countries represented

Percentages may not total 100% due to non-response or rounding.

This year's themes in numbers

Clarity and direction

73% — **Strategic gap**
Nearly three-quarters of organizations aim for a strategic model, but only 18% believe they have achieved it.

1.7x — **Frontline culture focus**
Frontline-heavy organizations are 1.7x as likely to prioritize culture than desk-based peers.

61% — **All change**
Change is the #1 desired skill—yet 61% have no formal change comms approach.

#1 risk — **Audience burnout**
High-volume environments see a 16% spike in risk of burnout—the top threat to HR and Comms.

15% — **The EVP blind spot**
Only 15% of organizations have an active, socialized EVP;

37% Over a third have none.

Operational enablement

1.3x — **Frontline challenges**
Organizations with a primarily frontline workforce are 1.3x as likely to perceive a higher level of risk to achieving their communication goals.

18% — **Personalization deficit**
Fewer than 1 in 5 organizations are satisfied with their ability to personalize content using their current channels.

Workforce readiness

75% — **AI experimentation gap**
Three-quarters of functions remain stalled in early-stage discussions or ad-hoc AI experimentation.

36% — **Confidence divide**
Only 36% feel AI ready.

61% This rises to 61% with governance and structure.

Human-centric communication

77% — **One size doesn't fit all**
Over three-quarters of respondents do not regularly use audience profiling techniques such as personas or archetypes.

30% — **Volume erodes trust**
Organizations with high volumes of communication experience a 30% jump in seeing 'leadership trust' as a significant risk.

87% — **Managers are the missing channel**
87% say manager capability is a risk;

21% Less than a quarter provide toolkits to support.

SECTION TWO

Setting the scene: the Readiness Gap

2025 marked the end of the era where change communication could be treated as a discrete skillset. Today, navigating volatility is the baseline of our profession. Yet, as our research shows, a widening **Readiness Gap** exists between the perceived risks within an organization and having the capabilities and structure needed to navigate those risks and meet the true communication demands of the organization.

For some, lack of visibility into what they are accountable for or into the business impact of their work limits their ability to achieve strategic clarity. You can't be ready for what you can't see. Other teams see the future more clearly but respond with high volume, low-targeted noise—eroding trust, and increasing burnout and overload along the way.

Readiness isn't about predicting the future; it's about building an informed confidence and resilience to handle whatever the future throws at you.

To address this Readiness Gap, proactive teams are codifying and actively socializing their vision for the future while offering visibility into the efficacy of their initiatives. We find that those with a consultancy mindset—who function like a strategic partner within their organization rather than a reactive service desk—are better equipped to deliver value and impact in complex environments.

Our data shows that strategic maturity is the primary driver of readiness. Mature teams don't face fewer risks—they often deal with more complexity. The difference is that they have the right approach, support, and mindset to navigate it.

The Readiness Index

To help us understand how prepared IC and HR professionals are, we analyzed several dimensions representing hundreds of data points per respondent. By grouping related questions into thematic indices, we calculated six core scores for every respondent.

Measuring strategic maturity and capability

Strategic maturity (Strategy)
This score measures the extent to which an organization has a codified strategy, active planning frameworks, and, crucially, how well that strategy is socialized and understood by the business.

Agility
This score helps us measure an organization's infrastructure and reach. It includes the effectiveness of the channel mix, the ability to reach all employees (both desk and frontline), and capabilities relating to personalization and segmentation.

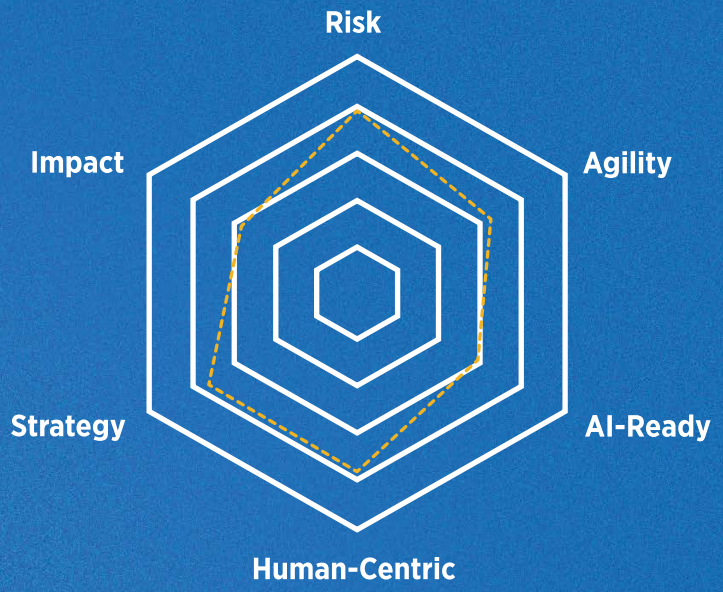
AI-ready
This score measures the future capability of an organization in regard to AI integration, from ad-hoc experimentation with AI to routine, governed use of AI for strategy and automation.

Human-centric
This score measures an organization's ability to deliver internal communications that rivals consumer experiences, specifically audience segmentation and agility regarding the tone and format of communications.

Impact
The Impact shows us the sophistication and impact of an organization's data measurement practices—moving from basic activity tracking (measuring clicks) to conducting sentiment analysis and measuring business impact.

Measuring risk perception

Risk
The Risk score represents the visibility and perceived urgency of organizational threats. It is a composite score of the most critical threats facing the function, including audience burnout, information overload, and lack of leader trust.



Global averages: ----

Risk 57%, Agility 46%, AI-Ready 39%, human-centric 55%, Strategy 54%, Impact 36%

To ensure comparability, all dimensions are indexed on a 0–100 scale, where 100 represents maximum capability/risk.

Understanding Readiness across the industry

Analysis of the six index scores revealed four 'Readiness' segments based on perceived level of communications and employee risk and overall strategic capability / maturity.

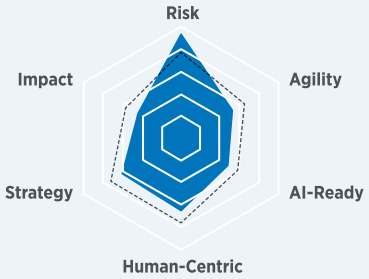
Readiness matrix: comparing risk vs. overall maturity

High

Risk

Vulnerable **30%**

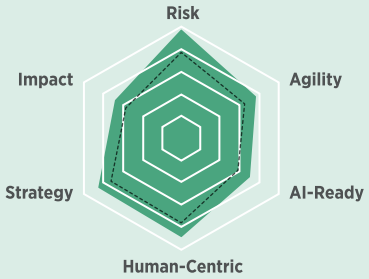
- **5x** as likely to have low visibility of accountabilities
- **3.1x** lower measurement maturity
- **1.3x** as likely to have a frontline workforce
- Strong representation **(35%)** from the Public and Health Sectors



The Vulnerable Segment operates in a high-risk, high-complexity environment where the focus is on rapid execution. Decisions in this cohort can be top-down, reactive, and driven by leadership requests rather than employee data, leading to an environment characterized by audience burnout and lower levels of leadership trust.

Resilient **23%**

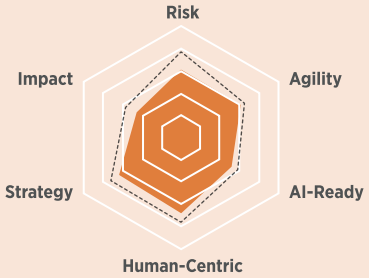
- **2x** as likely to have strategic risk exposure
- **51%** as likely to have a socialized strategy
- **2x** as likely to prioritize AI driven insights
- Primarily desk-based **(53%)** with strong representation from Finance and Retail



Respondents in the Resilient Segment reported the broadest and most complex mandates, yet they maintain a high degree of control. This group proves that high performance is possible even in high-pressure settings, provided that communicators have the discipline to measure what they manage and the maturity to stick to a codified strategy.

Untapped **21%**

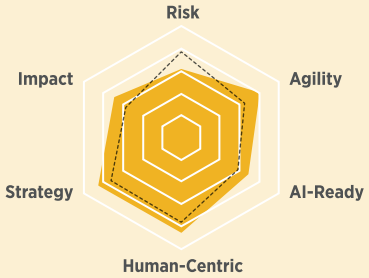
- Track only **43%** of what they are accountable for
- **2.3x** less likely to identify as a Strategic Consultancy
- **13%** exceed objectives (least likely of the segments)
- Largely desk-based **(52%)** with significant Public and Finance sector representation



The Untapped Segment is characterized by a false sense of security. Despite reporting low risk perception, this segment also scored low across all scales that are strongly linked to risk reduction. This segment is also more likely to identify as a 'reactive service desk' and struggle with being seen as 'administrative'.

Stable **26%**

- **52%** as likely to have a socialized and active strategy
- Track **90%** of what they are accountable for
- **3.1x** as likely to prioritize value metrics
- Mainly desk-based **(57%)** and characterized by Tech and Finance



The Stable Segment was the most likely to operate as a strategic consultancy within their organization, with strategic alignment as their top priority. This cohort tracks over 90% of their mandate, allowing for high visibility and effective governance. For these teams, the primary hurdle is often resource-based rather than capability-based.

Low

Overall maturity (channel agility, strategy, impact, AI-ready, human-centric)

High

Getting clarity on our purpose

Every year we ask communicators about the "why" behind internal comms. The answer is highly contextual; it's a dynamic set of priorities that shift based on your role, your workforce, and—most importantly—the direction and needs of the wider business.

When we asked communicators to rank their stated purpose, a hierarchy emerged with three distinct themes:

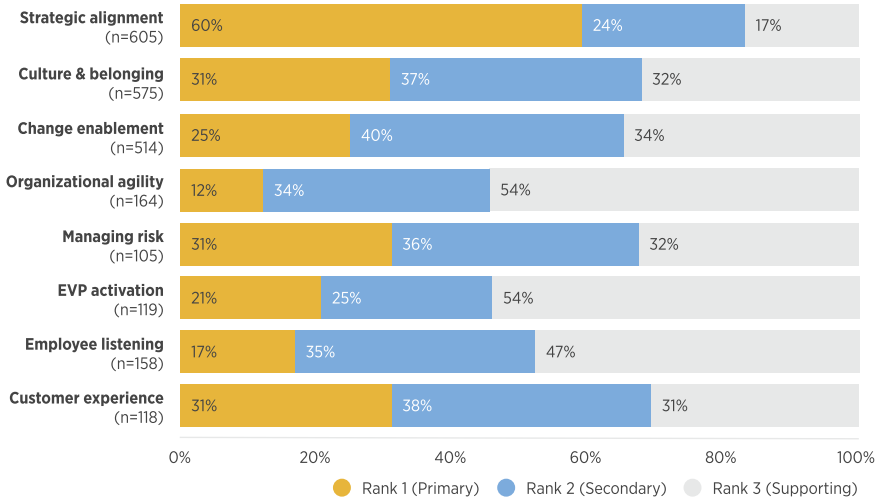
1. **The North Star:** Of respondents who selected it in their top three, **60%** listed **Strategic Alignment** as their #1 priority. It sets the entire agenda for the function.
2. **The Engine Room: Change Enablement** and **Culture & belonging** were the most common choices for the second rank. If Strategic Alignment is the goal, these two represent how we achieve it. **Culture & belonging** is remarkably balanced across all ranks, proving it is relevant at every stage of the conversation.
3. **The Foundations:** Topics like **Organizational Agility**, **Employee Value Proposition (EVP activation), and Employee Listening** spike in the third rank. They aren't seen as goals themselves, but as non-negotiable supports that enable consistent, aligned, and cohesive messages.

Change Enablement was a new choice this year and it was selected in the top three by 63% of respondents, bumping Organizational Agility down to #4. Change Enablement was selected as #2 by 40% of respondents.

EVP activation was selected as the #3 priority by 55% of orgs. It is *the* enabler and foundation of any organization-wide narrative.

Anatomy of purpose

Q: What is the purpose of internal communications in your organization?



Does seniority impact purpose?

Across most levels of an organization the #1 priority is overwhelmingly Strategic Alignment. However, at the very top, that priority shifts. IC, HR, and C-Suite are the only groups that prioritize Culture (32%) over Strategy (30%). While their organization is asking where they are going, leaders are focused on the experience once they arrive.

EVP: The supporting enabler

Over half of respondents selected EVP as a supporting layer

have an active and socialized EVP

have no formal EVP

Resilient (1.7x) and Stable (1.4x)

The more proactive segments were more likely to have an active EVP compared to average.

The frontline shift

One striking insight from our 2025 data is how purpose changes when you move from a primarily desk-based audience to the frontline. For organizations with a more difficult to reach frontline workforce, priorities change.

In desk-based organizations, **65%** of communicators ranked **Strategic Alignment** #1. In frontline organizations, that drops to **50%**.

Culture & belonging starts to compete in frontline environments, jumping to the top spot for **41%** of respondents. You cannot deliver strategy to a frontline workforce without first building a cultural connection.

In frontline environments, foundational goals also move up the priority list. **Organizational Agility** doubles in importance **(22% vs. 10%).** For frontline roles with high churn, the **Employee Value Proposition** is essential. It moves from an enablement task to a core priority to help retain talent.

What your industry says about your purpose

The mandate of an IC function is influenced by its environment. Traditionally desk-based sectors such as Tech or Finance prioritize Strategic Alignment to drive vision, whereas frontline-heavy sectors like Retail and Logistics pivot their focus to Culture and Risk as critical tools to support operations for decentralized staff.

The frontline spectrum

Finance & professional services

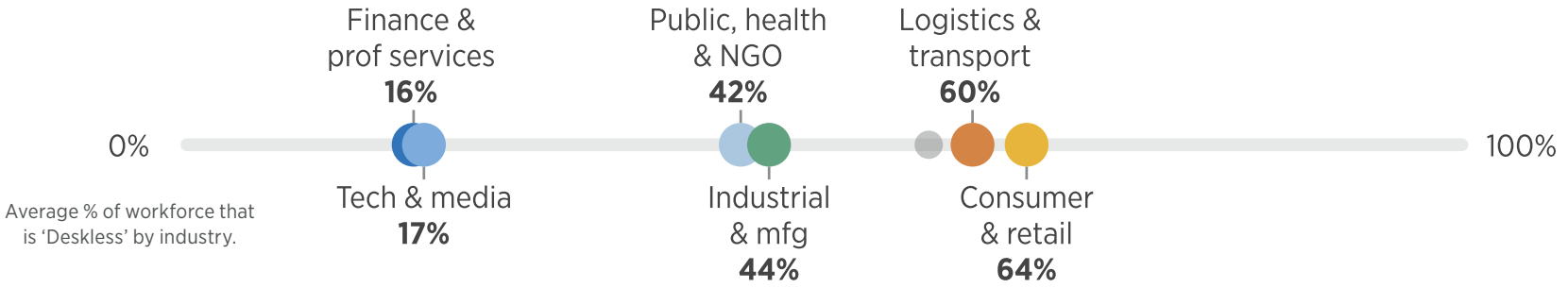
Serving an 84% desk-based workforce, this sector is 1.3x as likely to make Customer Experience their #1 mandate. Here, comms is uniquely tasked with connecting internal employee effort directly to external client outcomes.

Public, health & NGO

This is our most balanced workforce (42% frontline). While strategic alignment remains top of their list, this group is 1.2x as likely to elevate Change Enablement into their top priorities, serving as the delivery mechanism for complex, large-scale organizational shifts.

Logistics & transport

A 60% majority frontline workforce drives a 2.4x higher tendency to have Managing Risk as their #1 priority. In these high-consequence environments, Comms acts as a protective shield for non-desk workers.



Tech & media

An 83% desk-based workforce creates a 1.6x lift in focus on Strategic Alignment. Over 70% of respondents in these industries name Vision and Purpose as their singular #1 mission.

Industrial & manufacturing

Another balanced workforce drives a strong pivot to prioritize the employer brand, being 2.2x as likely than the average to make EVP Activation their #1 mandate.

Consumer & retail

With a 64% frontline majority, this global outlier shows a 1.6x greater likelihood to lead with Culture & belonging—the only sector where Culture is the dominant mission.

The pressure points driving the Readiness Gap

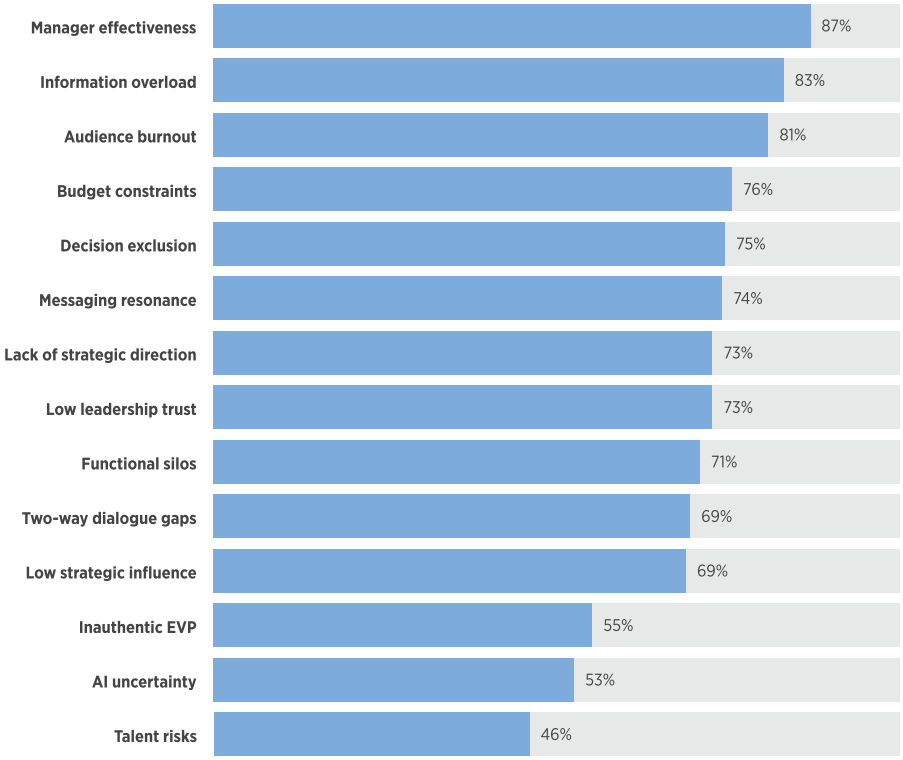
Each year we ask about barriers, challenges, and risks that prevent communicators from delivering on their purpose and objectives. These barriers and risks will always be present but the ability to confidently identify, evaluate, and mitigate them will ensure you are allocating appropriate effort and resources.

What impacts risk perception in Comms and HR professionals?

This year, we asked communicators to what extent they thought certain risks would negatively impact their ability to achieve communications objectives.

Strategic communications risk landscape

Q: Over the next 12 months, rate the potential negative impact of the following risks on your ability to achieve your communication objectives (n=631).



Showing % of Moderate and Significant impact.

Overwhelmed and burnt out

Employee burnout has reached a critical tipping point across the industry, with 81% of IC professionals identifying it as a 'Moderate or Significant Impact' risk within their organizations. In addition, 83% say information overload is a growing problem.

Finding the right noise to signal ratio within an organization is a constant battle. Unsurprisingly, volume was a key contributor to increased risk perception. With the known impact on productivity, focus, and ambivalence to messages that aren't perceived to be relevant to them, employees are missing important messages.

Solving the manager challenge

Through focus groups and client conversations, we are seeing the desire for manager communication capability make a resurgence. However, 87% of respondents said that managers lacking skills and capacity is a Moderate or Significant Risk. As discussed further in Section 3, only 21% of respondents reported actively using manager toolkits—essential in ensuring confidence in that last-mile communications reach. The manager challenge is not new, but with trust dropping and technology evolving, building a human connection through face-to-face communication and lines of influence is critical.

Compared to last year, line managers' capabilities moved up from #4 to #3 for 'Significant Impact'. For those working with a primarily frontline workforce, Line Manager Capability was the biggest focus (2x more than for desk-based organizations). However, it remains a universal challenge across all industries and organizations of all sizes.

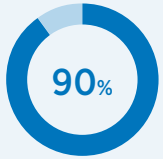
The big 6 universal risks: Operational reality for modern communicators

We asked respondents to choose their number 1 risk as a barrier to success. These 6 represent 67% of all selected risks.

Audience burnout #1

High levels of change cause cynicism and operational friction. The Stable Segment reduce this by **23pts** vs. Resilient peers.

Most impacted sector



Tech & Media / majority Desk-based

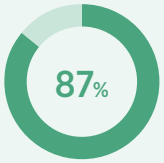
Impact of Org Size

Large orgs impacted more (+30pts) vs. small orgs

Budget constraints #2

The **#1 critical risk (23%)** for the Stable Segment. Once maturity is high, financial resources replace structural gaps as the main barrier.

Most impacted sector



Tech & Media / majority Desk-based

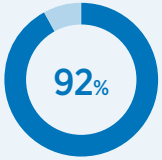
Impact of Org Size

High impact across all sizes

Line manager effectiveness #3

A primary concern for Untapped (17%) and Stable (15%) Segments. This appears to be the hardest risk to reduce; even the most mature are struggling—with 78% ranking it as a moderate or significant risk.

Most impacted sector



Retail / majority Frontline

Impact of Org Size

Impact is independent of org size—this is a global crisis

Information overload #4

The impact of noise strongly defines the Resilient Segment (13% rank it #1). Their high capability is being neutralized by the volume of their comms.

Most impacted sector

Industrial / balanced workforce

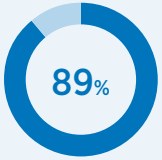
Impact of Org Size

Large orgs see **+25pts** more impact than small orgs—ranked #1 mostly by enterprise level orgs (93%)

Decision exclusion #5

Being siloed is the defining risk for the Vulnerable Segment (94% impact). Progress on this requires closing a **40pt gap** in strategic involvement.

Most impacted sector



Pharma / balanced workforce

Impact of Org Size

Impact is most acute in key growth **org** structures (500+ people)

Lack of direction #6

There is a high 40pt gap between the Stable and Resilient Segments. The impacts are most acute for the Vulnerable Segment (9% rank it as #1).

Most impacted sector

Pharma / balanced workforce

Impact of Org Size

A universal challenge with only a 7pt gap across all org sizes

What reduces perceived communications risk?

Our data shows that high channel agility and a strong information supply chain reduce important risks including Overload (-18%) and Burnout (-14%). Burnout and overload are a direct influence of communicating too much or communicating without strong tactical execution and audience rigor. Such agility—or the ability to segment, target, personalize, and reach audiences—was critical. In the high-risk Resilient Segment, teams prioritized face-to-face (not digital) employee listening and feedback mechanisms to better understand and replicate the employee voice.

Most communicated topics

It's noisy out there. With multiple functions, layers, and individuals acting as communicators, and every channel competing for exposure, employees' attention is spread thin. Within complex structures and distributed employee landscapes, centralized teams face friction when driving global alignment and strategy with their audiences demanding relevant, localized information as a priority.

What did businesses communicate about in 2025?

While saturation continues to increase across all topics, Strategy, vision, and purpose continues to hold the top spot year on year. However, it's clear that the volume of communication is impacted by the business needs, environment, and even industry type.

By segment

- The high maturity Stable Segment push **Strategy (92%)** more than any other group. They have successfully reduced the "lack of two-way dialogue risk" by **52%**, and with strong audience rigor, their communications land as alignment rather than noise.
- The Resilient Segment communicates the highest volume of messaging related to Values, Behaviors and Culture (87%), and AI (55%). This volume-heavy approach correlates to the +24% increase in risk of Audience Burnout.

By workforce

- **Majority desk-based** teams communicate about **Strategy (86%)** and **AI (51%)** at the highest rates in the report. This high volume is a driver behind the **+23% increase in significant risk** for **Information Overload** among this group.
- Conversely, **majority frontline** teams are potentially "strategically underserved," receiving the lowest volume of **Strategy (71%)** and **Change (67%)** content.

By industry

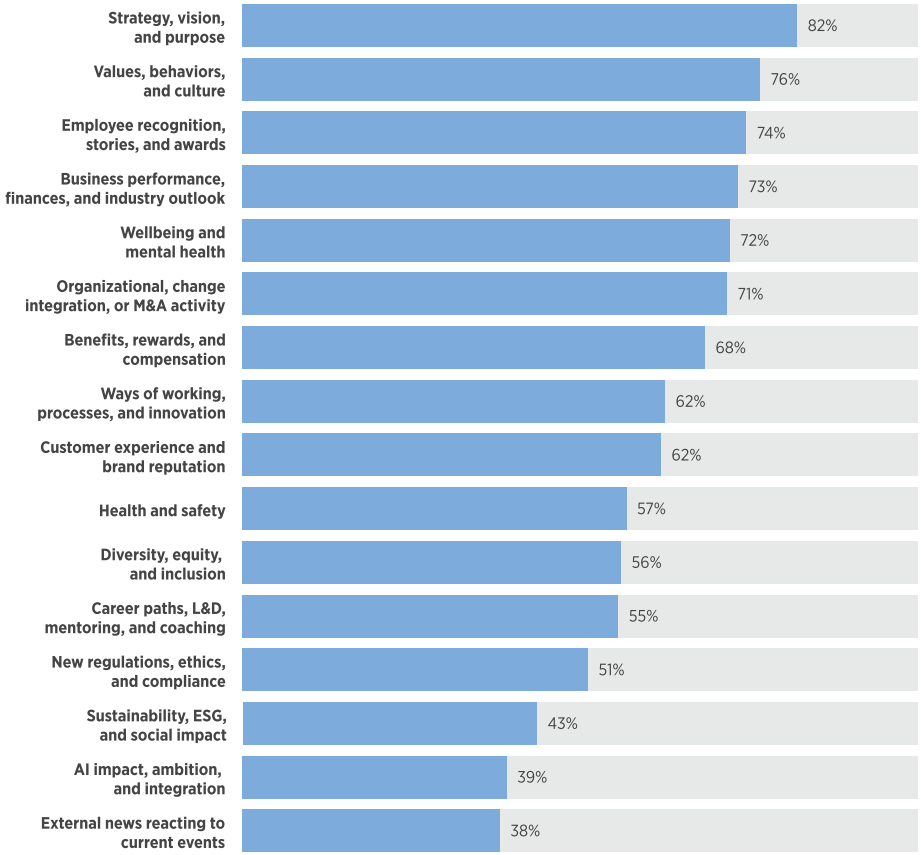
- **Pharma & Life Sciences** report the highest volume of **Strategy messaging (94%)**. Despite this high volume, they also report the highest risk for **Low Leadership Trust (94%)**, which carries a **+30% Leadership Trust Penalty** when volume is not met with authentic connection.
- **Industrial & Manufacturing** lead in comms relating to **Change volume (78%)** and **Business Performance (87%)**, focusing on operational transformation.

By organization size

- **Enterprise organizations (10k+)** see a **+30pt penalty** in **Audience Burnout** compared to small organizations (in high volume environments).
- They also face the highest "noise" levels, with **93% of Enterprise respondents** reporting significant impact from **Information Overload**.

Communications topic volume

Q: Considering volume, how much has your organization communicated around the following topics this year? (n=596)



Showing % High and Medium volume

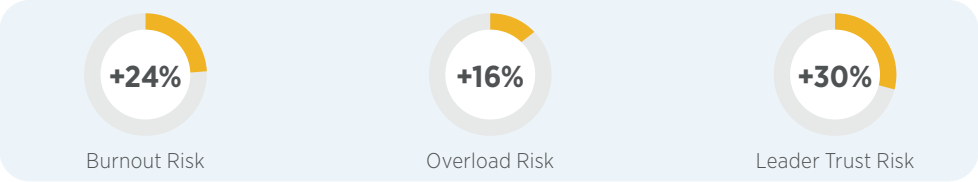
The cost of high volume

When organizations communicate at high volumes (compared to medium volumes) about topics like Change, AI, or Values and Strategy, there is a significant increase in the percentage of respondents rating the following as "significant risks." High levels of Strategy and Vision communications correlated with all of the "Big 6" risks.

Tipping points

While higher communication volumes generally raise perceived risk, the shift from medium to high output triggers particularly sharp increases in several key risks.

Change
Change volume carries the highest cumulative "Trust Penalty," suggesting that pushing change without authentic connection and buy-in is the fastest way to erode leadership credibility.



% increase for risk when communicating Change at High vs. Medium volume.

% increase for risk when communicating at High vs. Medium volume.

Changing business demands, transformation agendas, and regulatory pressures ensure that communicators live in high-volume landscapes. In this environment, the opportunity lies not in turning down the volume on comms per se, but in strengthening and protecting the organization's attention and bandwidth to absorb them.

Improving the impact of change communication

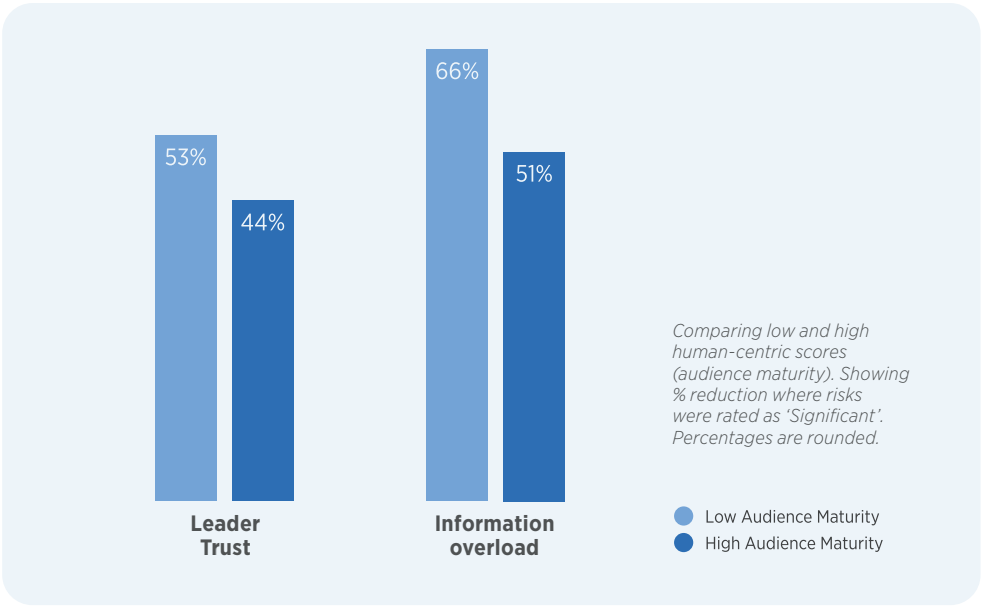
Our data shows that organizations with strong human-centric communication capabilities—particularly segmenting and tailoring comms based on audience, and adjusting their channels and messaging approach—can reduce the impact of high-volume change comms on risks like information overload (-23%) and lack of trust in leadership (-18%). Additionally, those in high-volume, high-risk environments noted higher value and effectiveness of face-to-face listening and feedback mechanisms compared to digital ones.

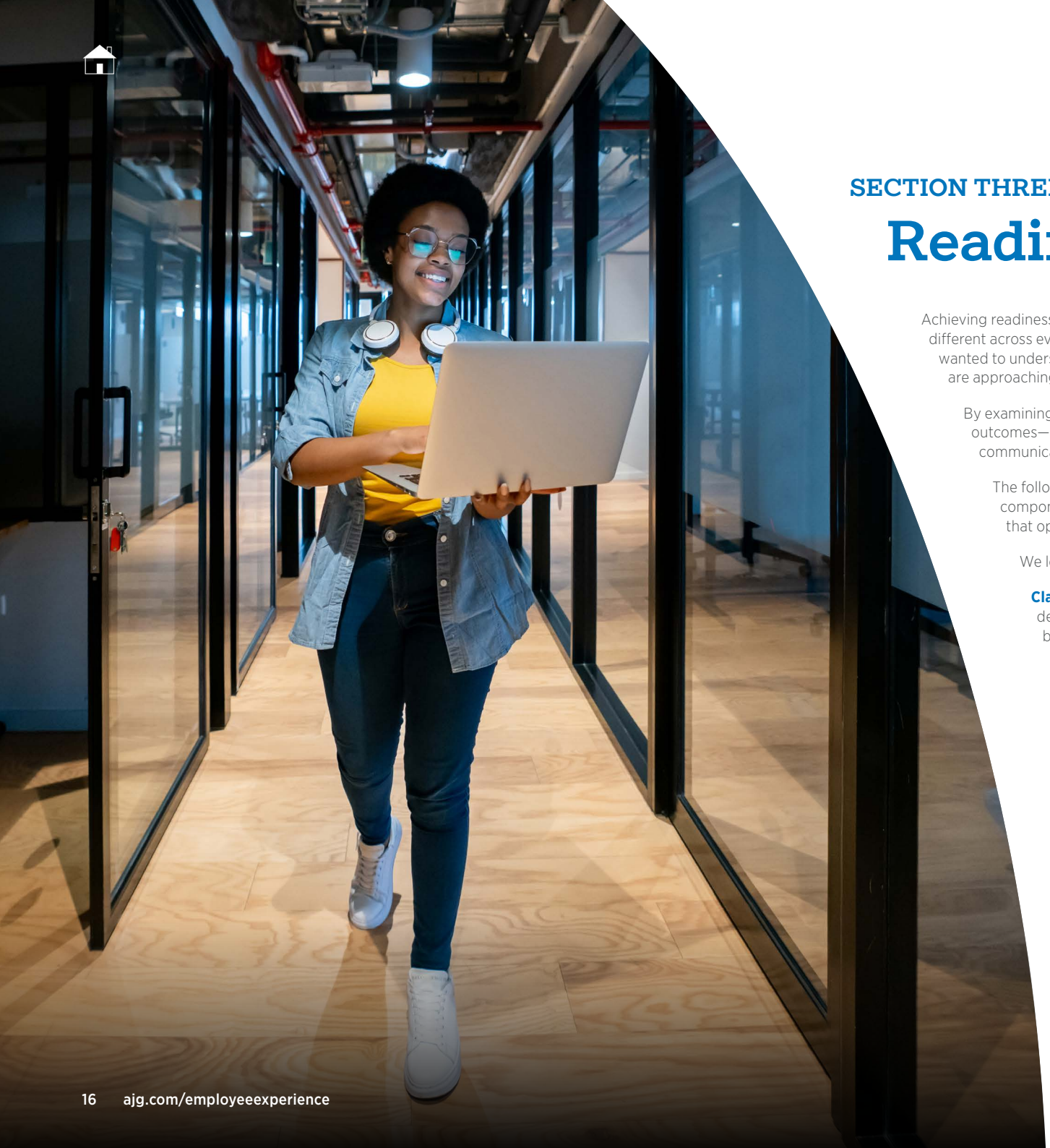
The Stable Segment was able to cut leadership trust risk almost in half (-42%) through their audience first approach. Meanwhile, the Resilient Segment (high risk) were able to reduce reported risk of information overload by 17% with a similar method. It is this move that helps Resilient teams move into an Stable state.

You can read more about this pattern in the section on human-centric Communication.

The relevance shield

High impact risks were lower, where respondents scored strongly for use of audience-first tactics such as segmentation and a human-centric tone.





SECTION THREE

Readiness in action

Achieving readiness—both in mindset and capability—is easier said than done and looks different across every organization and communications team. For this year's report, we wanted to understand what challenges peers across the industry are facing, how they are approaching them, and which practices are proving most effective.

By examining the data, we can link specific behaviors and practices to measurable outcomes—and begin to outline a clearer path toward a more strategically mature communications function.

The following sections explore how readiness shows up across the core components of the communications engine—and what distinguishes teams that operate with high strategic maturity.

We look at:

Clarity & direction: How communicators align daily activity to their desired operating model and why integrating comms strategy into broader business planning strengthens overall readiness.

Workforce readiness: The evolving skills, structures, and capacity demands facing IC—and what it takes to prepare both communicators and employees for continuous change.

Operational enablement: The systems and processes that translate strategy into meaningful outcomes, including the impact of strong data and measurement practices.

Human-centric communication: The impact that connecting on a more human level through personalization, relevance, and accessibility has on trust and engagement.

Together, these insights form a roadmap for strengthening readiness at every level of the communications ecosystem.

Gaining clarity & direction

The key to matching our day-to-day actions to our desired operating model

Across the industry, IC and HR teams are striving to become more proactive and influential with 73% saying they want to be considered strategic partners in their organization. Yet for many, strategy lives in inconsistent fragments: a few slides, a leader's intuition, or—most commonly—in someone's head. The result can be a function that wants to operate with clarity and influence, but lacks the shared direction required to get there.

In the last few reports, we have explored to what extent IC and HR teams are capable of being (and allowed to be) strategic partners in the organization. In our experience working with clients, being a trusted partner happens in pockets; some teams do this incredibly well, despite their small size. However, friction comes where strategy is de-prioritized or when it only lives in our heads and is not shared with other teams or leadership.

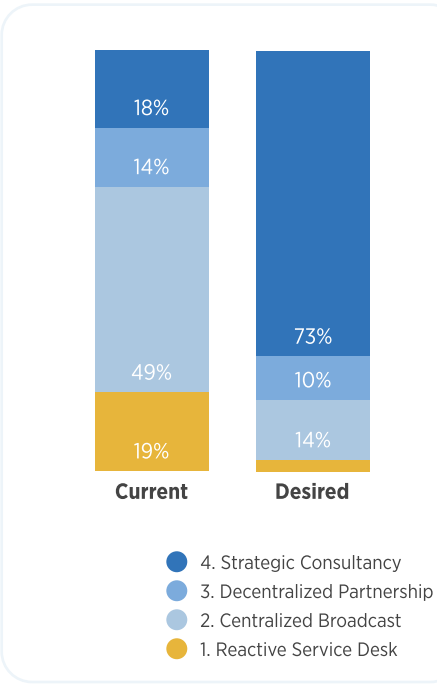
The work of "professionalizing the IC function" is a story we have been exploring over the past few years. This year we dove even deeper and started testing our intuition and what we're hearing from conversations with clients and industry leaders: that making strategy practical and useful in the day-to-day lives of communicators is a collaborative process and an essential part of solidifying the function as a strategic partner within the organization.

Bridging the gap between what we want and how we operate

Across organizations, there is a widening divide between the target operating model teams aspire to and the one they are actually living. A whopping **73%** say they want to function as strategic consultancies, but only 18% say this is current reality, with most **(49%)** operating as a centralized broadcast function. Notably, almost 1 in 5 feel they are a reactive service desk.

The ambition gap

Q: Which statement best describes the day-to-day reality of your function's current primary operating model? (n=472)



3x Stable Segments are **3x as likely** to operate as Strategic Consultants than Vulnerable teams.

2x Vulnerable Segments are nearly **2x as likely** to be stuck in 'Reactive Service Desk' mode.

80% High-maturity Segments (Resilient / Stable) are **80% more likely** to adopt a 'Decentralized Partnership' model.

73% want to operate as a Strategic Consultancy. **1 in 5** feel like a reactive service desk.

The strategic maturity score is based on a mixture of responses from the survey that cover: if your team has the right strategic foundations in place, if you have the required cross-functional collaboration in place, and most importantly, if your strategy is socialized and being used for active decision making.

When functions have clarity and direction that are socialized and acted on, the likelihood of identifying as a strategic consultancy increases by 4x. Strategy is not a nice-to-have—it is the structural difference between teams who influence the future and those who are simply responding to it.

Getting the foundations right

Many teams believe they have a strategy, but when pressed, they are more likely to have a set of intentions rather than a codified decision-making framework. Invariably it's not about a lack of capability; it's about getting the expertise within our heads aligned with business needs, translated practically, and then socialized with stakeholders and leaders. This helps the rest of the organization understand how to interact with and get the most impact out of a communications function.

For 5 out of the 7 foundational strategic assets we asked about (such as EVPs, Strategic Narratives, or Manager Toolkits), over 50% of teams operate without an agreed on, codified standard: either the asset doesn't exist at all, or it lives in someone's head. That leads to "strategy" that can't be shared, scaled, or measured, and teams will struggle to build the strategic muscle required to influence the business.

Additionally, strong governance—especially in ways of working and processes—lays the groundwork for consistent measurement and performance improvement. This is essential when evaluating current or new tools. For example, evaluating how AI could be effectively used for automation and task efficiencies within an organization's workflow.

Do larger teams have more strategic coverage?

Our data highlighted that slightly larger teams were more likely to have some of these foundational documents, perhaps due to having more focused roles or more collective time. Teams of over 11 people were 2x as likely to have key strategic components. However, they were not as likely to have manager toolkits and audience profiling—two documents that were universally neglected.

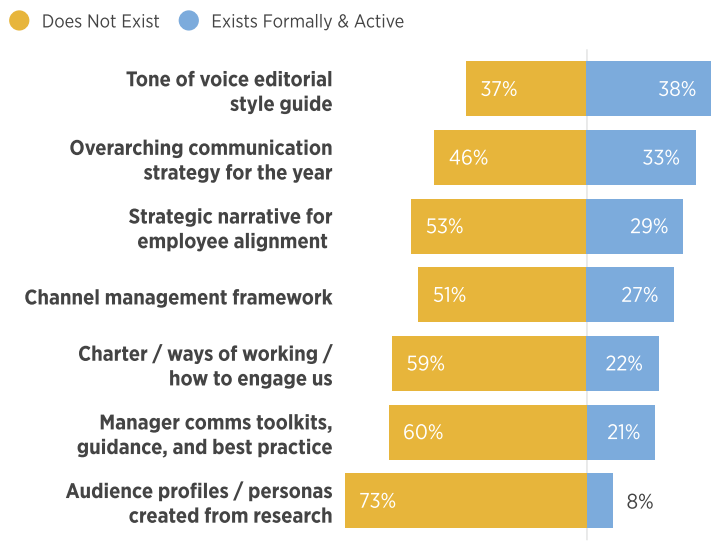
Reduction of key communications risks

The ability to confidently identify, measure, and apply audience sophistication to communication challenges was a key trait of high performing segments (Resilient and Stable). High scores, driven by a well understood strategy, act as a shield. A high strategy score correlates with a universal reduction in reported perceived risk—especially with risks rated "highly significant."

- **61%** don't have a formal Change comms approach **(#1 overall risk)**
- **37%** don't have manager toolkits or playbooks **(#3 overall risk)**
- Only **8%** of orgs formally use robust personas
- Only **1 in 4** have a channel framework
- **58%** don't have a formal listening approach (Note: feedback was a key driver of high performing segments)

Strategy foundation gaps

Comparing 'Active Use' vs. Non-Existence' of key documents. Remaining % was either 'Don't know / NA' (all < 10%) or Informal / Not Active. (n=509)



+29%

Those with an 'Active' Channel Framework reported a 29% Channel Capability (fit for purpose) boost.

3x

Consumer & Retail are 3x as likely to have a Channel Framework than those in Industrial & Mfg.

23pt

Sector differences for 'Active and Used' Manager Toolkits with Logistics & Transport lowest (5%), and Industrial & Mfg the highest (28%).

The impact of a socialized and active communications strategy

Codification is only half the equation; strategic assets need to be socialized (shared, agreed, and understood throughout the business), baked into day-to-day processes, and actively used for decision-making and evaluation. This is especially true in distributed, disconnected environments where reliance upon communications reach and influence is more reliant on untrained communicators.

Only 27% of respondents agree that their strategic documents are 'Well Understood' by stakeholders. But this understanding does more than just improve alignment; it also triggers a chain reaction that improves measurement practices, channel agility, and operational infrastructure, as well as reducing perceived risk. In fact, investment in socialization pays for itself by reducing missed KPIs by 50%. Teams that successfully socialize an active, living strategy, double their odds of success.

This suggests that a bottleneck in many functions cannot be solved by only improving skills, tools, or tech—these functions are also struggling because they lack influence and shared direction or struggle to translate that direction into action.

For teams in the Vulnerable Segment, strategy lives in a vacuum. While 45% say they are involved in shaping content, only 6.3% successfully socialize the strategy behind it. Moving from a Vulnerable to a Resilient Segment results in a 6.8x improvement in how the function communicates its own value. This isn't an incremental improvement; it is the total replacement of a 'Postbox' mindset with that of being a 'Strategic Partner' which triggers lift in all capabilities.

Small team struggles

Teams of fewer than 10 people were all below the 27% average who agreed that they had a well understood strategy with key stakeholders. This increased to 52% agreement in large teams.

Public, health & NGO **19.9%**

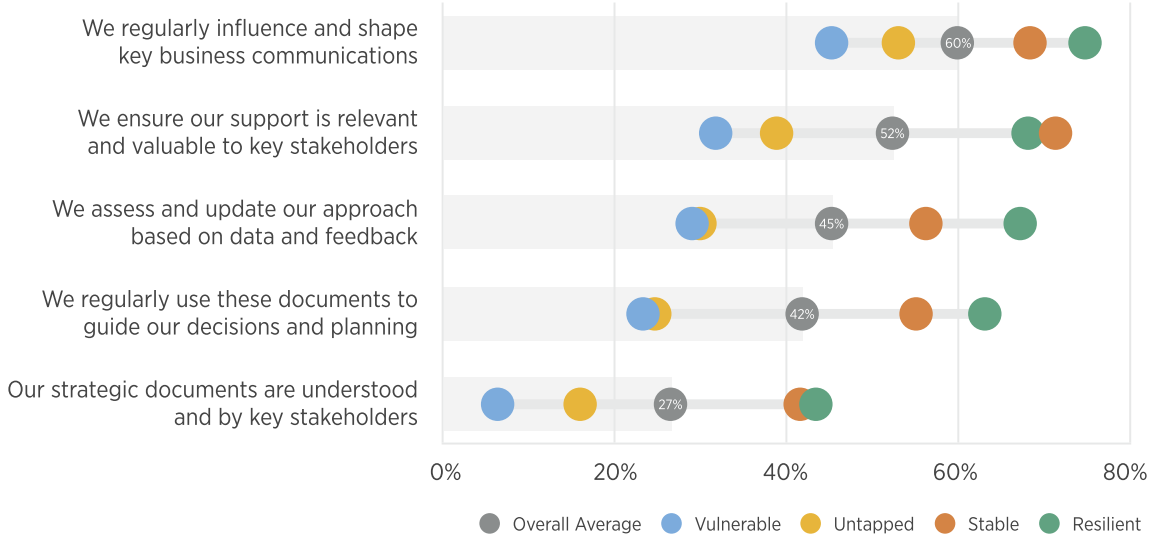
These groups reported the lowest socialization in the report and had the highest risk of decision exclusion at **91.7%.**

Industrial & manufacturing **38.5%**

These industries lead the socialization ranking, which helps them mitigate the **87% Line Manager Effectiveness** risk common in frontline sectors.

How socialized and active are key strategic documents?

% Agree and Strongly agree with statements (n=498)

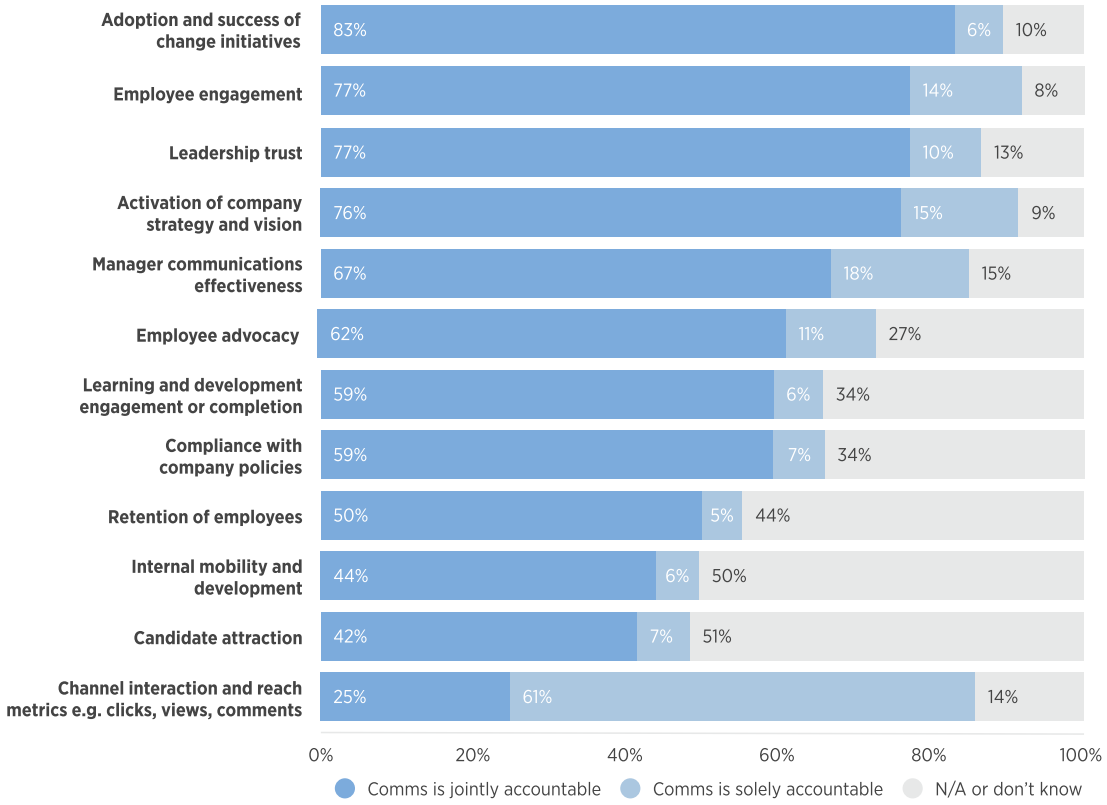


Getting greater visibility into your mandate

Building on last year's accountability analysis, we explored the data to understand the nature of shared scope and the impact on performance within the function. This year we added Leadership Trust which quickly made the top three with 77% stating joint accountability. Leadership Trust was a key communications risk in this year's report and nearly 1 in 3 respondents are not measuring its effectiveness.

Shared accountability dominates our mandate

Q: What success indicators are you responsible for? (n=756)



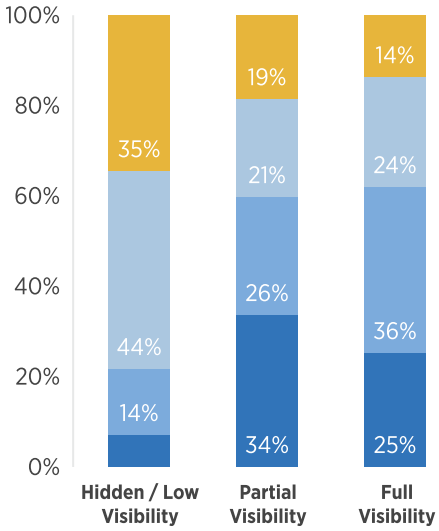
In the more reactive segments (Untapped and Vulnerable) almost half of their mandate is not being tracked. You can't measure what you can't see, and when you can't measure the impact of your effort, it's difficult to track your successes or back up your strategy with data. Having visibility into what your team is accountable for puts you in a better position to mitigate risk and influence decisions within the organization.

38% of respondents are not tracking the effectiveness of Manager communications

The Resilient Segment are tracking **80%** of their mandate. This is a +30 pt difference compared to the Vulnerable Segment

30% of respondents are not tracking Leadership Trust

We found the ratios of tracked to untracked scope differed greatly across our four segments with a 5x difference (Resilient vs. Vulnerable) where high performing segments tend to have both larger mandates and better visibility into their responsibilities.



Tracking communication accountabilities

The 'Hidden' group is dominated by Vulnerable teams; 'Full Visibility' is led by Stable teams

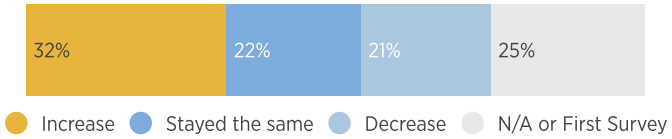
Untapped · Vulnerable · Stable · Resilient

Shows a 'blind spot ratio' (untracked vs. total tracked function accountabilities) grouped into low, partial, and full visibility. (n=504)

Strategy as a driver of engagement

Communications inevitably drive key components of employee engagement relating to alignment with direction, employee experience, relationship to managers, and other cultural measures. When employees understand where the organization is going and why, their trust and participation rise. This year we asked respondents about their previously known company-wide engagement scoring.

Reported engagement trends



Q: Thinking about your most recent organization-wide EE survey, what was the overall trend in your headline engagement score compared to the previous survey? (n=471)

Of our respondents, 77% say that Employee Engagement is a shared target. It's often centrally owned and surveys rarely include questions specifically about communications, but it's widely used as a performance measure for assessing employees. Without a clear strategic connection or communications effort, engagement remains a lagging indicator. Regardless, this metric is highly visible throughout organizations and valued by leaders.

Functions with high strategic maturity scores (meaning they have a codified, active, and socialized strategy) were at least **3.5x** as likely to report increased engagement. Although those reporting higher perceived communications risk were as likely to report a 'Decrease' in engagement.

Reported Increases across all industries ranged from **24%** (Industrial & Mfg) - Tech & Media **(38%).**

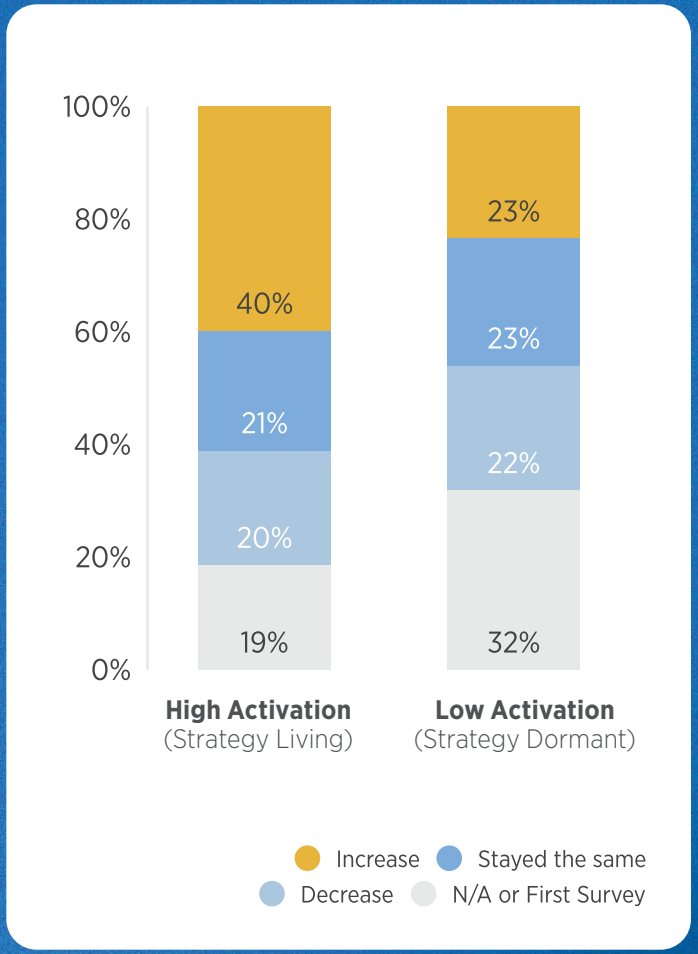
32% of respondents reported an increase in employee engagement from the last known survey.

Pharma & Life Sciences reported the highest decrease. Note these respondents all noted the highest risk for 'Lack of Direction from Leadership' at **94%**.

45% of Enterprise **(10k+)** organizations reported an increase.

Does strategy drive engagement?

Respondents who had a more socialized, active strategy outside their function were more likely to report an increase in employee engagement.



Composite score from questions relating to socialization, influence, and active state of communications strategy ***grouped into high and low activation****. (n=471)*

Workforce Readiness

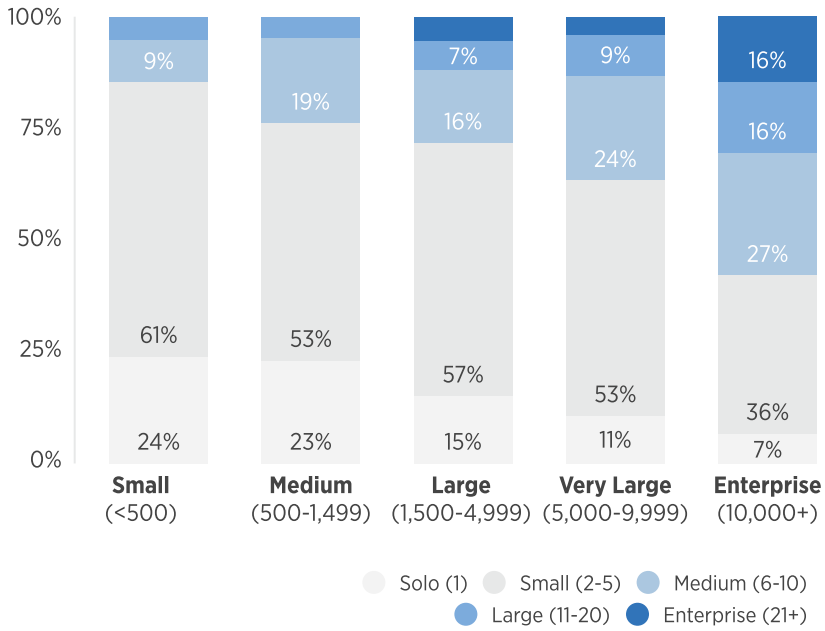
The structure, skills, and scale challenges shaping the future of IC

Internal Communications and HR teams are being asked to lead rapid transformation and deliver connected employee experiences at a moment when their own capacity, structure, and skills are under unprecedented strain. Change within organizations has accelerated faster than the functions themselves, creating a widening gap between what organizations need and what these teams are resourced to deliver. This is particularly evident when companies grow beyond 500 employees and the demand for IC support on alignment, EVP, culture, and performance initiatives increase in response to growing infrastructure and employee experience challenges.

Across organizations of every size, IC and HR teams remain comparatively small with 69% of organizations having fewer than six people in a comms role, whether they support 500 employees or 50,000. With such limited capacity, teams naturally gravitate toward transactional work—publishing, distributing, responding—because the volume of requests leaves little room for strategic planning or proactive influence.

Budget pressures deepen the challenge. 1 in 5 have less than $20,000 and 1 in 3 have no dedicated budget—limiting investment in tools, training, and measurement. These are precisely the areas required to elevate the function and shift from reactive delivery to strategic influence.

Team distribution by organization headcount



1 in 3 small communications teams operate in Enterprise orgs

69% have fewer than 6 people on the team (85% in small orgs)

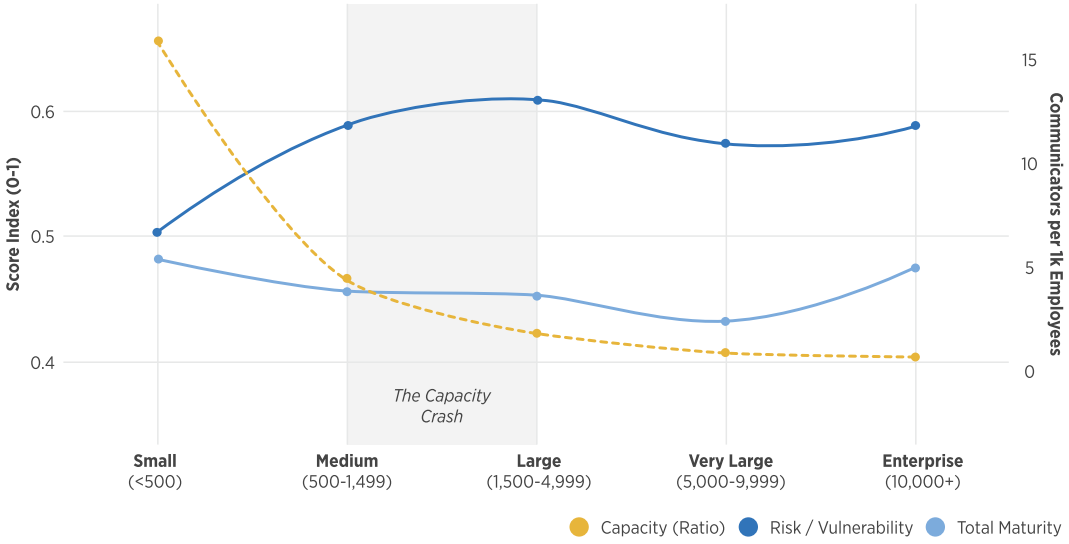
1 in 3 have no dedicated communications budget (increases to 44% in small orgs)

Navigating the communications risk of mid-market growth

We often assume that as organizations grow, their communications capabilities grow with them, but our analysis revealed a capability dip associated with increased risk as organizations grow larger than 500 people. This is evidence of a pattern we have experienced through client projects in the past few years.

Capacity and growth challenges

Relative capacity drops by 72% approaching mid-market, creating elevated communications risk.



Small organizations typically have a bigger ratio of communicators to employees and easier lines of communication to C-Suite and strategic stakeholders. When organizations scale, and workforce complexity increases, IC capability drops as small teams of communicators are expected to do more with fewer resources and less visibility. At this point, perceived risk increases by 21% and there is a 73% drop in communicators per 1,000 employees—that's a massive 3.6x reduction in capacity.

During high change and growth phases, it's more challenging to segment, measure, and appropriately target an increasingly complex workforce with varied needs. Risks such as burnout, overload, and trust erosion among employees accelerate, making high-value, targeted communications even more essential. However, with more complexity comes more bureaucracy, strained channel infrastructure, less agility, and potentially less freedom to be creative with communications.

Growth Challenge: The Transition from Small to Medium

1 in 4
Communication functions operate as a reactive service

44%
have no dedicated budget

1.2x
increase in perceived risk

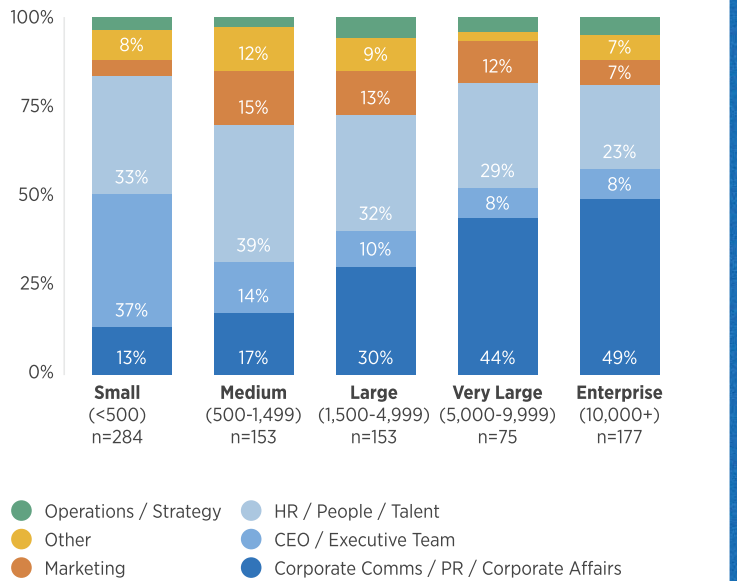
1.3x
reduction in data and measurement capability

3.6x
reduction in capacity

1.2x
reduction in perceived channel capability

The evolving home of communications teams

Reporting lines shift with organizational growth.



The evolving home of communication

As organizations scale, Communications undergoes a structural migration, with a significant percentage of functions in **medium (39%)** and **large (32%)** organizations living within Human Resources. This displacement correlates with a **73% capacity crash** and significant dip in overall maturity.

However, at the **Enterprise level (10,000+)**, a structural rebound occurs and Communications finds its permanent home as a standalone **Corporate Affairs or PR function (49%)**, nearly **4x more common** than in small organizations. This professionalization could be a driver behind the **16% recovery in Strategic Maturity scoring**, as the function gains the budgetary autonomy, larger teams, and executive visibility required to mitigate the risks of scale.

Are change communication skills the new key to survival?

Change is no longer a specialty; it's the job. If the last decade was defined by channel expansion, the next will be defined by change capability.

This year, change management communication was the top-ranked skill (57%), and yet, 61% of teams do not have a change communications approach in their strategy—a significant gap.

Our focus group participants echoed this tension. Many noted that while change is now "business as usual," the systems supporting change communication have not evolved. Teams are often asked to respond without the tools they need like a defined change narrative and channel strategies or measurement models that track adoption rather than activity.

Without these frameworks, teams are forced into "backfoot" communication—reacting to change rather than shaping it and driving adoption. The result is communication that can feel inconsistent and disconnected from the broader transformation agenda.

Readiness segment skills priorities

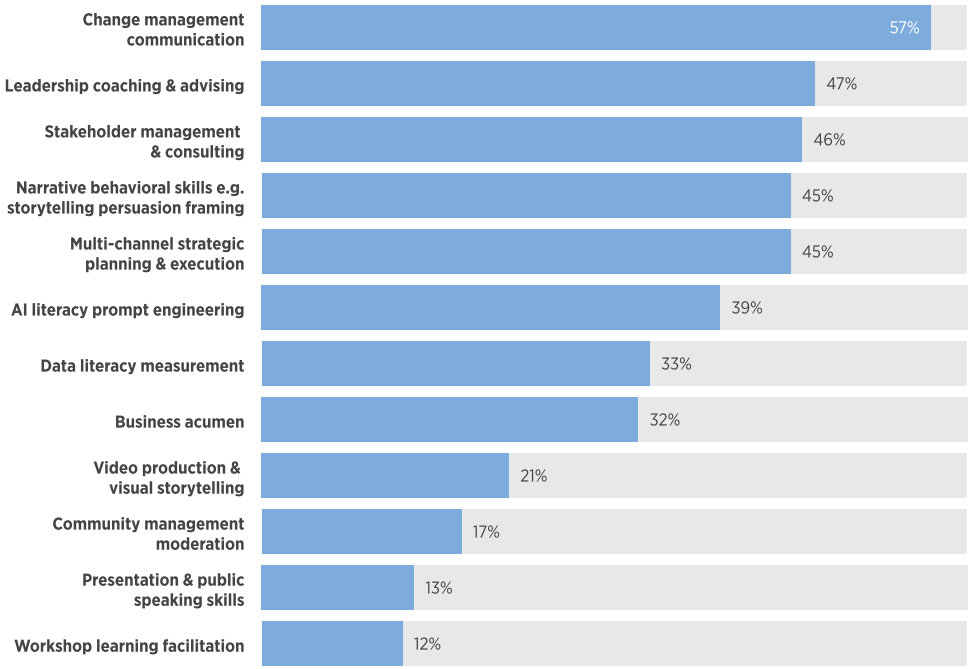
Vulnerable	Resilient
1. Change Mgmt (62%)	1. Change Mgmt (61%)
2. Multi-channel Plan (51%)	2. Leadership Coach (60%)
3. Narrative / Storytelling (49%)	3. AI Literacy (55%)
Untapped	**Stable**
1. Change Mgmt (53%)	1. Change Mgmt (56%)
2. Stakeholder Mgmt (43%)	2. Narrative / Storytelling (53%)
3. Narrative / Storytelling (43%)	3. Leadership Coach (47%)

Showing % selecting 'High Importance' by segment.

> **"Change is a constant – it's just become part of the cycle for the whole of my team. However, that capability gap is definitely there. How do we plug that [gap] at a time where there's not really any money for training or upskilling?"**
>
> **Focus group attendee**

Skill prioritization

Q: In the next 12 months, which communication skills and competencies will be the most critical in your organization? (n=587)



Shows % selecting 'High Importance'.

Change is the Constant: It is the only skill that stays at #1 across every single segment, regardless of maturity or risk.

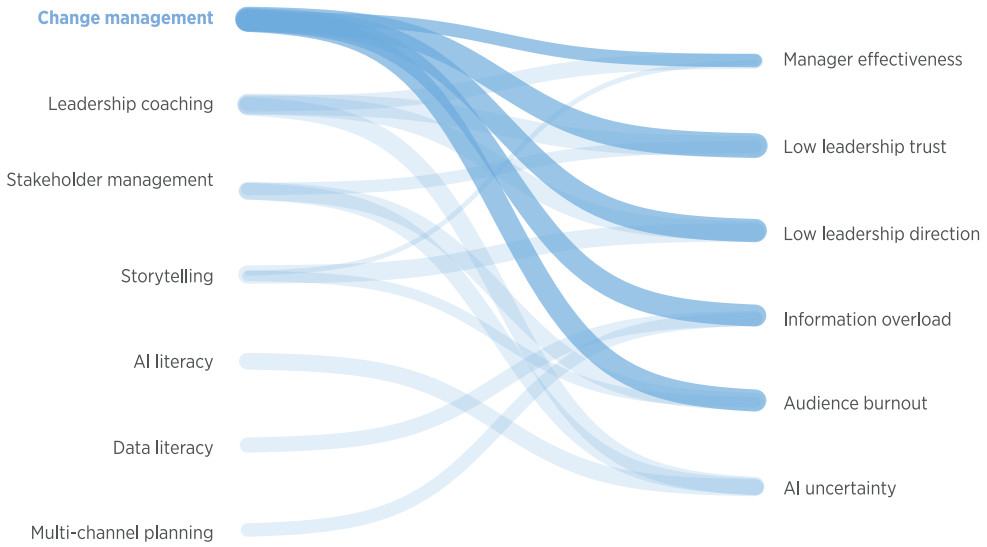
The AI Literacy Jump: There is a **1.7x increase** in the importance of AI Literacy when comparing Untapped (**32%**) to Resilient (**55%**) Segments.

The Coaching Requirement: Resilient teams (High Mat, High Risk) prioritize **Leadership Coaching (60%)** significantly more than Untapped teams (**38.9%**).

The Data Mandate: Data Literacy jumps from **28%** in the Unaware group to **45%** in the Resilient group.

Skill prioritizations for #1 risks

When comparing the impact of top ranked skills on highest perceived risks, change management communications was rated as having the most importance, illustrating the dynamic, fluid nature of our most challenging risk factors.



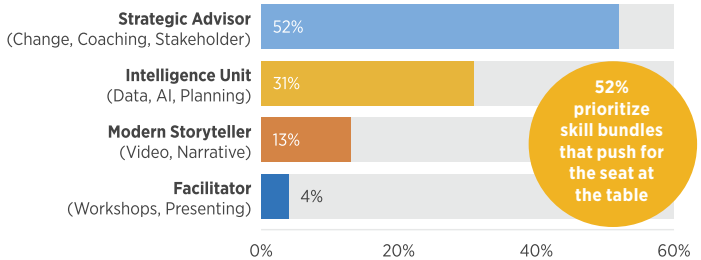
Line weight represents % of respondents who rated skill as 'High importance' for related risk.

Respondents consistently recognized that good change communication is essential to staying ahead of risk—particularly around manager and leader engagement. This underscores that change management is the critical connective tissue between strategy, execution, and employee experience.

What types of skills are people prioritizing?

From our analysis of skill priorities, respondents tended to select skills that correlated together.

Emerging skill archetypes



% of respondents selecting correlated clusters of skills (n=585).

The "Strategic Advisor" (52%) - This is the "Seat at the Table" skill bundle. Teams prioritizing these are building the capability to influence leaders, not just support them.

Core skills: Leadership Coaching + Stakeholder Management + Business Acumen

The "Intelligence Unit" (31%) - Those in this bundle are making the most of the opportunities that new technology is providing.

Core skills: AI Literacy + Data Literacy

The "Modern Storyteller" (13%) - Video has a strong link to communicating narrative and creating an emotional connection across channels.

Core skills: Video Production + Narrative / Storytelling

The "Facilitator" (4%) - Represents the "Front of Room" capability. Teams that value one almost always value the other.

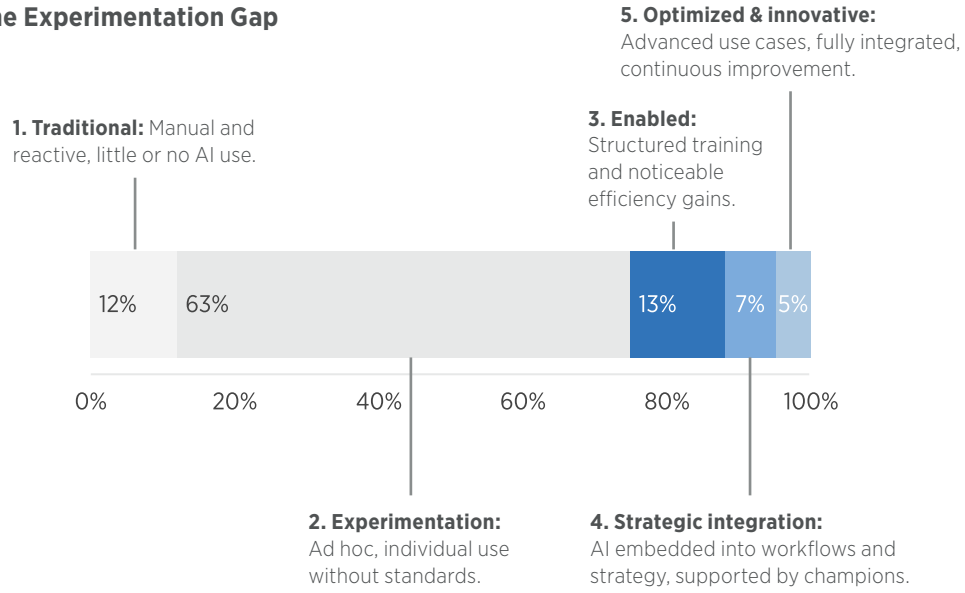
Core skills: Workshop Facilitation + Presentation Skills

The AI spotlight

AI continues to dominate headlines, but inside organizations, its adoption tells a more nuanced story. While enthusiasm is high, Readiness is uneven. Some teams are experimenting at the edges; others are beginning to embed AI into workflows and decision-making. And many are still waiting for clarity, structure, or permission—governance is lacking.

Moving from experimentation to creating value is a challenge. In this section, we explore what moves us closer to value, with 75% of respondents being in reactive or ad-hoc models of AI maturity. An experimentation gap is emerging.

The Experimentation Gap



Q: Which of the following best describes your function's current stage of AI adoption? (n=472)

Opportunity or threat?

Overall sentiment toward AI is positive, but it varies significantly by role. Senior leaders tend to view AI as an opportunity. Support and administrative roles, however, are 2x as likely to perceive AI as a threat. This divergence matters. If the people closest to execution feel uncertain or at risk, adoption is likely to stall—regardless of leadership enthusiasm. AI readiness is fast becoming one of its defining components of workforce readiness.

AI skills confidence

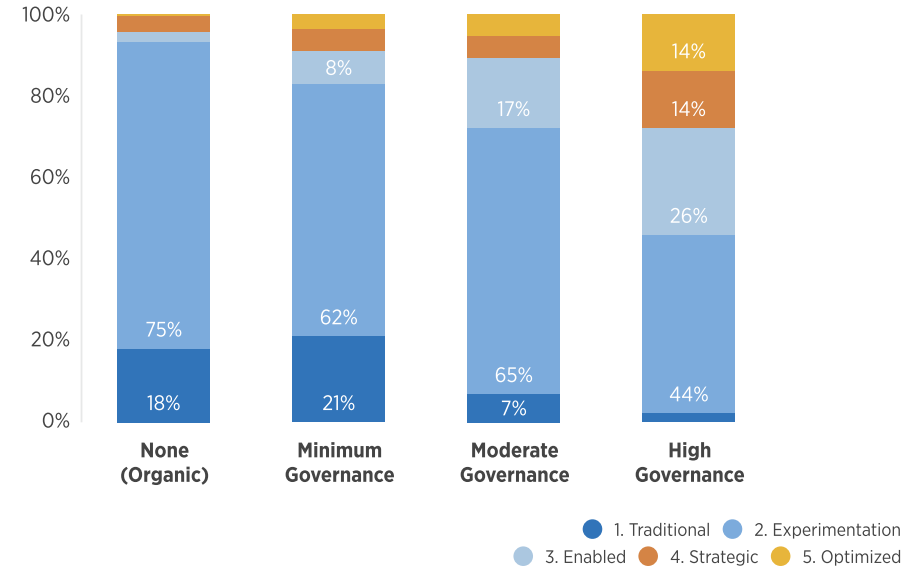
Only 36% of all respondents agree or strongly agree that they have the skills, literacy, and critical thinking required to use AI effectively. However, this number jumps to 61% for those who our analysis identified as AI ready: routine users with structure, support, and governance.

Transformation gap: The path to AI enablement in communications

AI is already reshaping workflows, expectations, and speed in communications. The question is whether the function is structurally ready to benefit. Teams operating with high governance, clear policies, dedicated training, and active champions are **10x more likely to reach Enabled maturity** than those relying on organic, unstructured adoption.

Moving from Stages 1–2 (Traditional / ad-hoc) to Stages 3–4 (Enabled / Strategic and Data Driven) unlocks consistency, quality, productivity, and better informed decisions. The communicators who will thrive are building the governance and skills to use AI confidently and with purpose—turning experimentation into measurable value.

Impact of AI governance on organizational structure / role design and value



Governance group created from responses to levels of support and structure around Generative AI application (n=472)

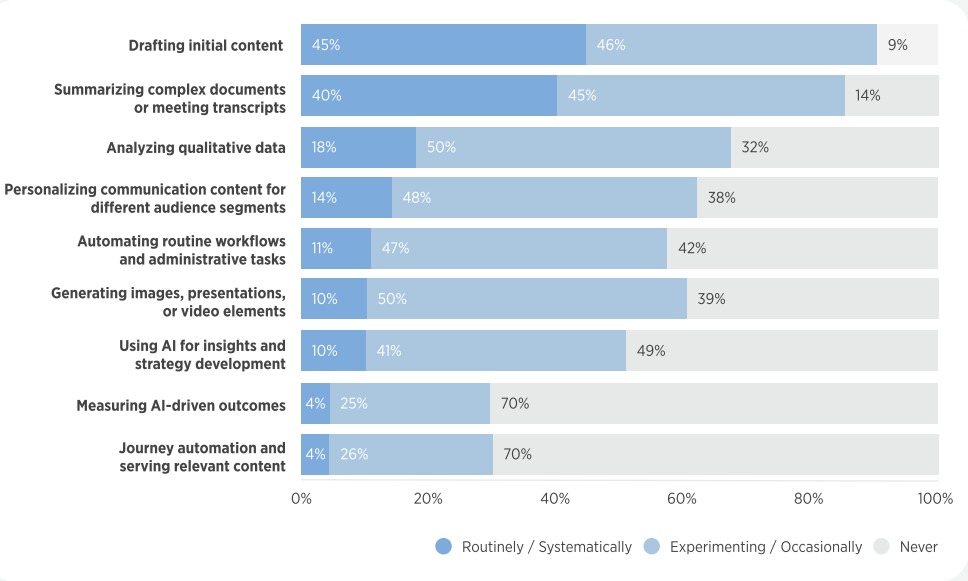
Those in higher mature AI models (Optimized) were over 20x as likely to Strongly Agree or Agree that leaders had a clear AI strategy compared to those in Traditional.

Who is getting the most value out of AI?

While AI adoption is widespread, the *type* of adoption varies dramatically across the different segments.

AI usage in communications

Q: How frequently is your function using AI for the following tasks? (n=472)



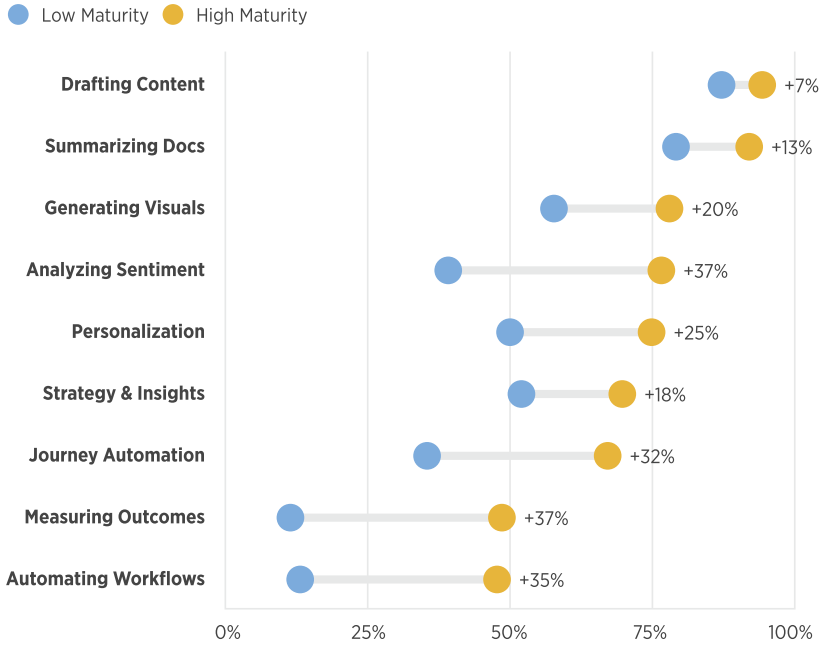
Nearly everyone who responded is using AI for drafting and summarizing. These tasks are universal because they are relatively simple, safe, and immediately helpful. But while they can save time, they don't impact how the function operates.

The AI value gap: segment differences

A divide emerges when we look at higher value use cases that influence decision making such as measuring outcomes and generating strategy and insights. High maturity teams (the Resilient and Stable Segments) are using AI to *amplify their thinking* and *measure*. Low maturity teams use AI to *draft*.

The AI value gap

Segment usage differences by maturity



Comparing Routine Usage by Low Maturity (Untapped / Vulnerable) and High Maturity (Stable / Resilient) segments.

This divide is the clearest indicator that AI is not a shortcut to maturity; it simply amplifies whatever maturity already exists. Teams with strong strategic foundations use AI to elevate their capabilities. Teams without those foundations simply use AI to move faster within the same constraints.

Both routine usage and high governance levels increased with organization size. 50% of small organizations (<500 employees) stated they were experimenting with no formal oversight or governance.

Operational enablement

The infrastructure that turns strategy into impact

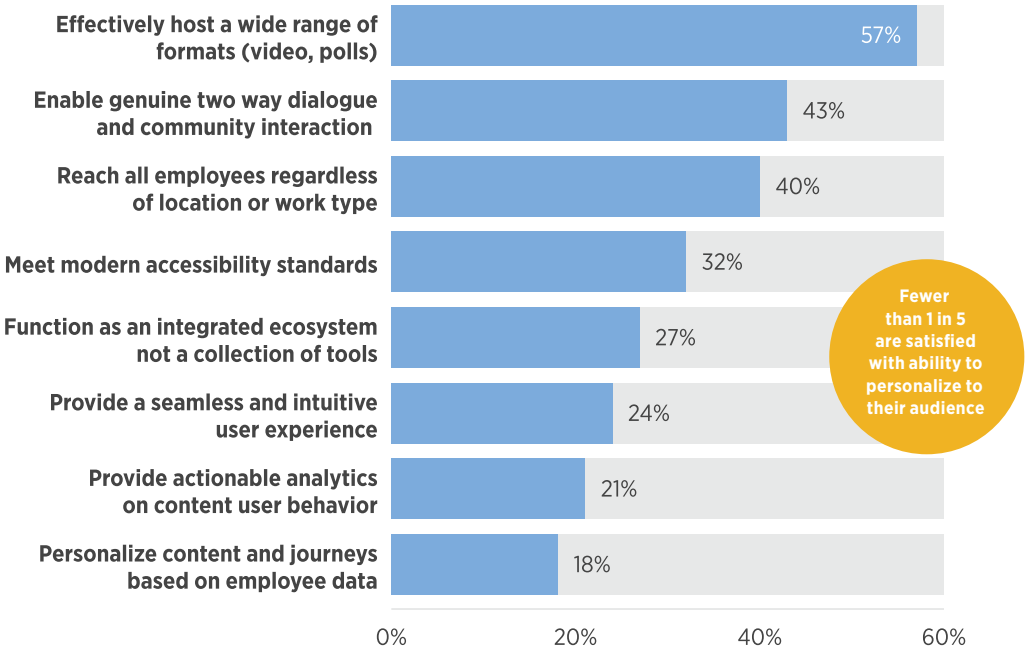
Effective communication is not about having more channels or more technology. It is about having the right systems, the right insight, and the right governance to ensure that communication is targeted, trusted, and effective. **Despite this, not even 1 in 5 respondents are satisfied with their ability to target audiences.**

Channels (both physical and digital) form the infrastructure of modern communications—the plumbing that carries information and provides feedback mechanisms across increasingly complex organizations. When you have strong channel agility, your ability to identify communications risks is also more informed. We found a strong relationship between having channels that are fit for purpose and reducing perceived risk, especially on Audience Burnout (-14%) and Information Overload (-18%).

Channel agility: are our channels fit for purpose?

Every year, we ask about channel effectiveness and value, and it's clear that communicators are still frustrated with their lack of ability to reach their people. We are up against new and changing technology, increased complexity and growth, and a communications landscape where everyone has a voice and protecting the audience from noise is pivotal.

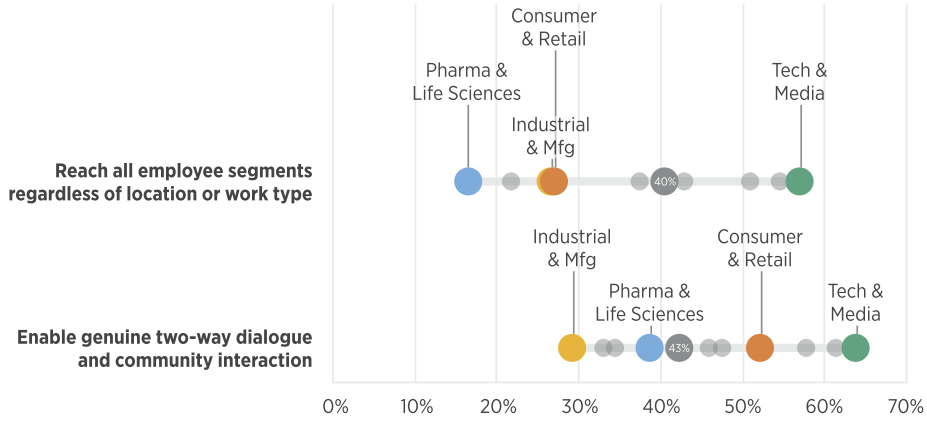
Channel capabilities and satisfaction



% Satisfied and Very Satisfied for channel capabilities (n=571)

Sector reach and engagement

Responses varied significantly by sector when looking at reaching employees and providing opportunities for two-way communication.



% Satisfied and Very Satisfied by sector.

Teams with higher channel agility (satisfaction with capabilities) report lower perceived risk across the board, including a **14% reduction in Audience Burnout** and an **18% reduction in Information Overload**. Operational enablement isn't a hygiene factor. It is a risk reduction mechanism.

Interestingly, respondents from smaller organizations (<500 employees) consistently reported higher agility. In operational enablement, small is big—fewer layers, fewer systems, and fewer competing voices create a more coherent communication environment. As organizations grow, the operational burden grows with them.

Alongside these dynamics, the value and demand for in-person channels has increased. In complex environments, teams are deliberately prioritizing face-to-face communication to unpack difficult subjects and provide context that digital messages cannot fully carry.

Channel effectiveness

The effectiveness of a specific channel is driven by a number of factors and is often dependent on the audience.

Our data reveals a rise in both demand for and effectiveness of in-person, human channels. This is likely a response to the misuse and over-saturation of digital channels, but it could also be showing increased efforts to reach audiences who do not have access to digital, centralized channels.

Human premium

Those in frontline-heavy environments rated 'In-Person Town Halls' as their single most effective channel (51%). When switching to virtual, this drops 18pts. In an era of digital-first communication, the most disconnected workforce (Frontline) places the highest premium on physical presence.

Data leverage

We saw a direct correlation with reported effectiveness of channels and a function's data measurement capability with a 37% increase in channel effectiveness overall between low impact and high impact score groups. These high scoring groups were also 3x as likely to be satisfied with channel capabilities for 'reach' and 'personalization'.

Line manager enablement

Line managers remain one of the most relied upon communication channels—especially for frontline and distributed workforces. However, their effectiveness is inconsistent.

Line managers vary widely in experience, confidence, workload, and access to tools. Yet most organizations treat them as a single, uniform channel, expecting consistent performance without providing consistent support.

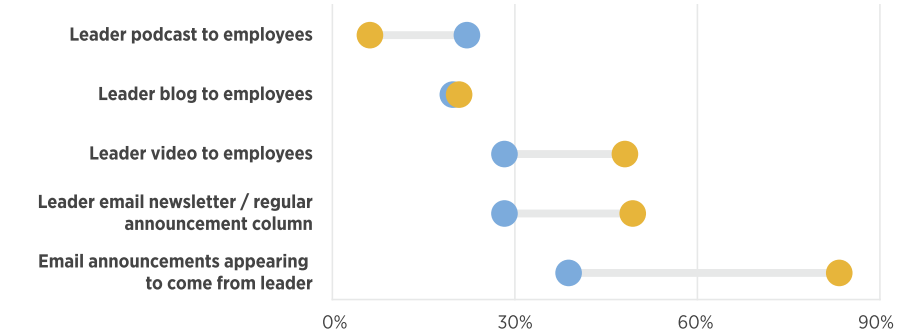
> **"People managers are arguably the most important channel that we have in our armory, but we have the least control over them...therefore we need to lean in and help."**
>
> **Focus group attendee**

Channel effectiveness vs. usage

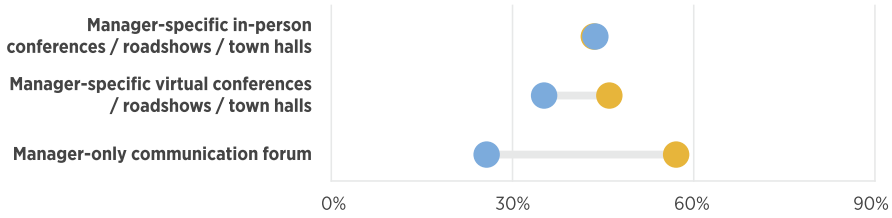
Usage (Adoption) Effectiveness (Impact)

The following charts show % overall usage and % rating 'Very effective' by channel groups.

Leader to employees

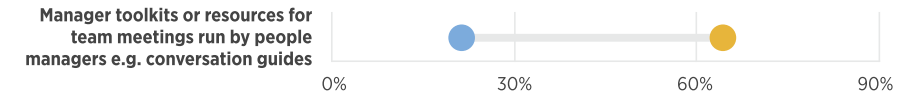


Company to managers

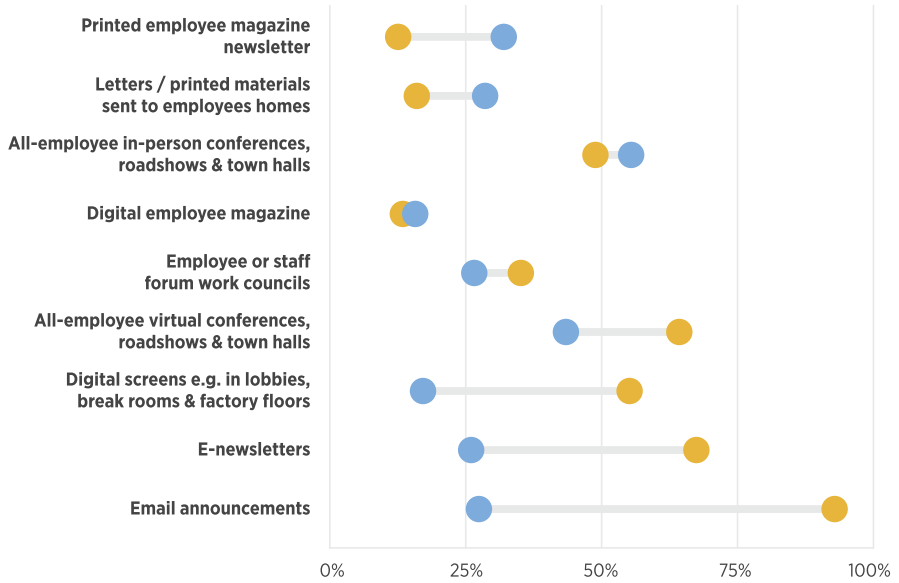


Usage (Adoption) Effectiveness (Impact)

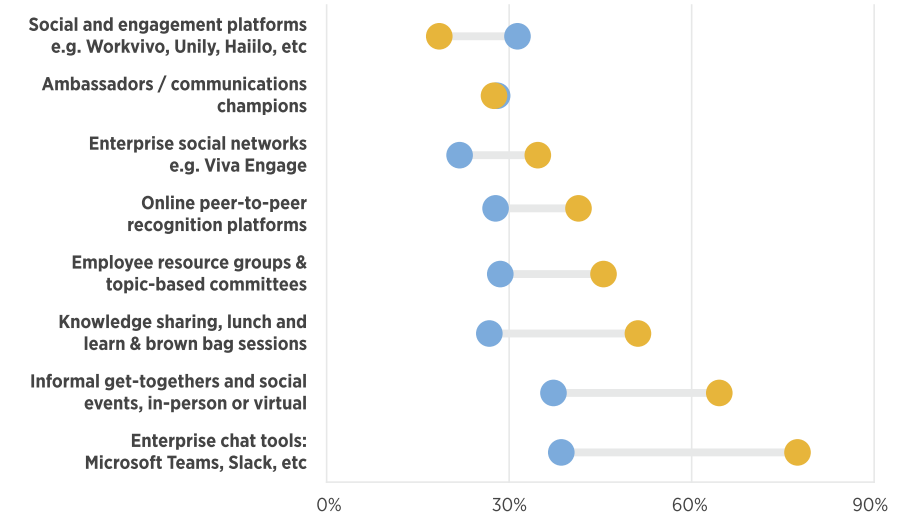
Manager to employees



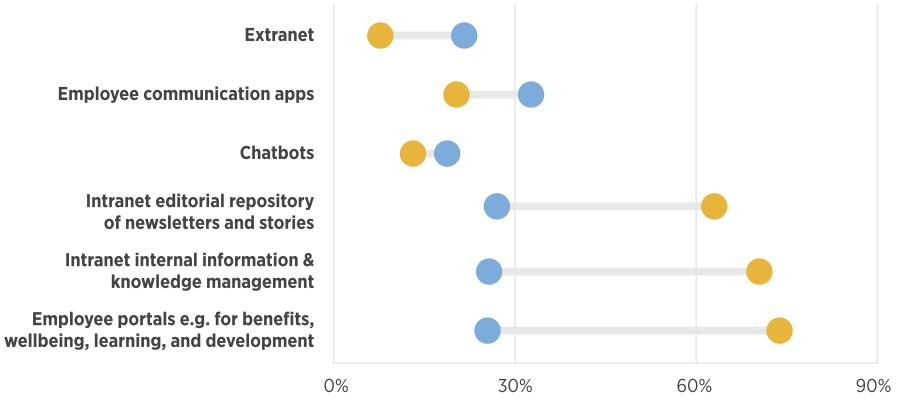
Company to employees



Worker to worker



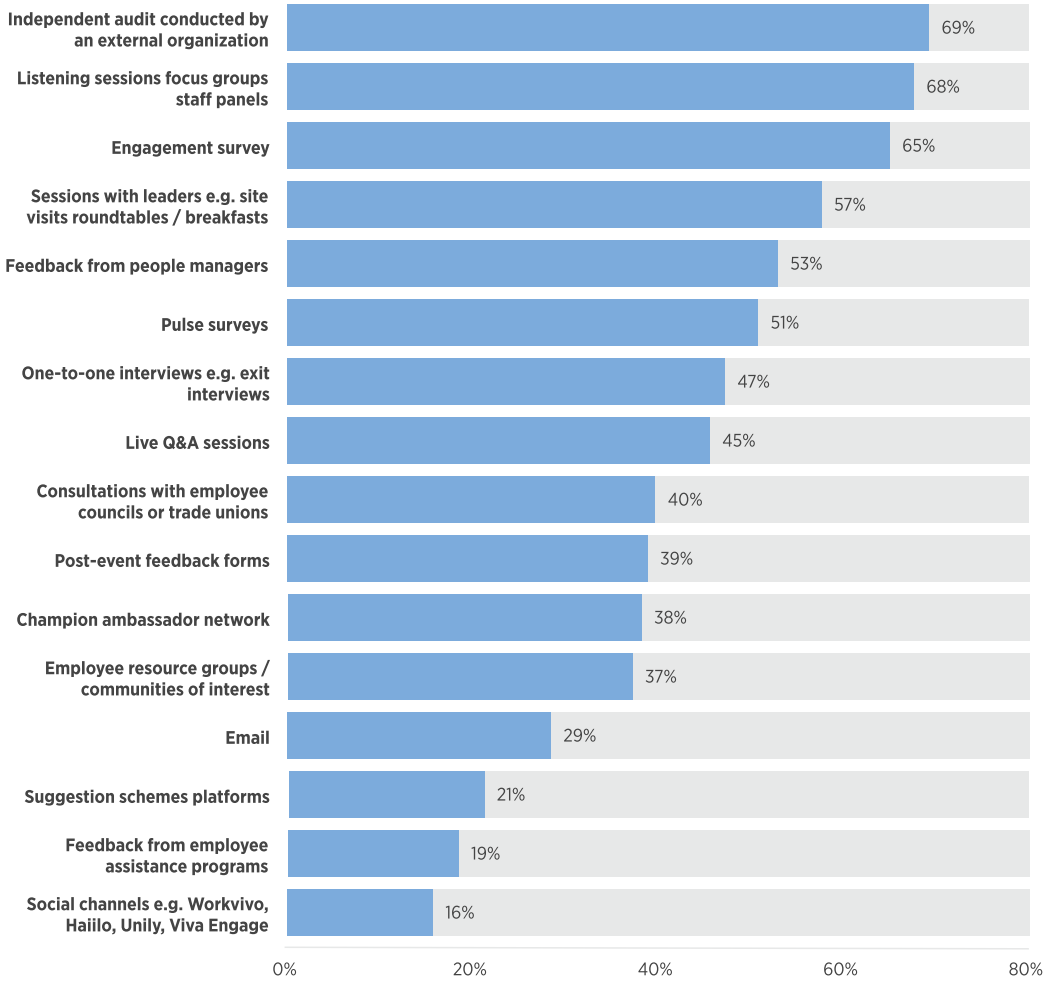
Employee self-service



Feedback loops: The listening premium

Strong communication systems don't just transmit messages—they listen. Well-structured feedback loops provide the insight needed to course-correct, build trust, and ensure messages have the desired impact.

What listening channels provide the most value?



% High and Very High value. (n=536)

Qualitative techniques, such as listening sessions and focus groups, were highly rated. These methods work in tandem with quantitative metrics to enhance decision-making by providing the "why." This is especially apparent in organizations facing trust challenges. For teams dealing with the risk of "Low Trust in Leaders," listening sessions emerged as the most valued channel. When trust is under strain, human listening is more important than ever.

More than two thirds of respondents (69%) stated that audits were also of high or very high value, particularly when mapped against risks such as "Leader Trust," "Lack of Strategic Direction," "Overload," and "Manager Capacity." Well-designed audits give teams the evidence to refine their channels and strengthen the entire operational system.

Who changed a channel this year?

Teams that selected "employee feedback" as a key driver of change tended to come from the high maturity segment. High maturity teams don't guess; they ask. They use feedback loops not only to validate what is working, but to actively shape their channel strategy. Listening,
in this context, is a defining characteristic of how mature teams operate.

Prioritizing high value listening channels

High maturity segments (Resilient / Stable) experience significant value from core listening channels compared to Low Maturity segments (Untapped / Vulnerable).

5x Internal Social Channels

1.7x Live Q&A sessions

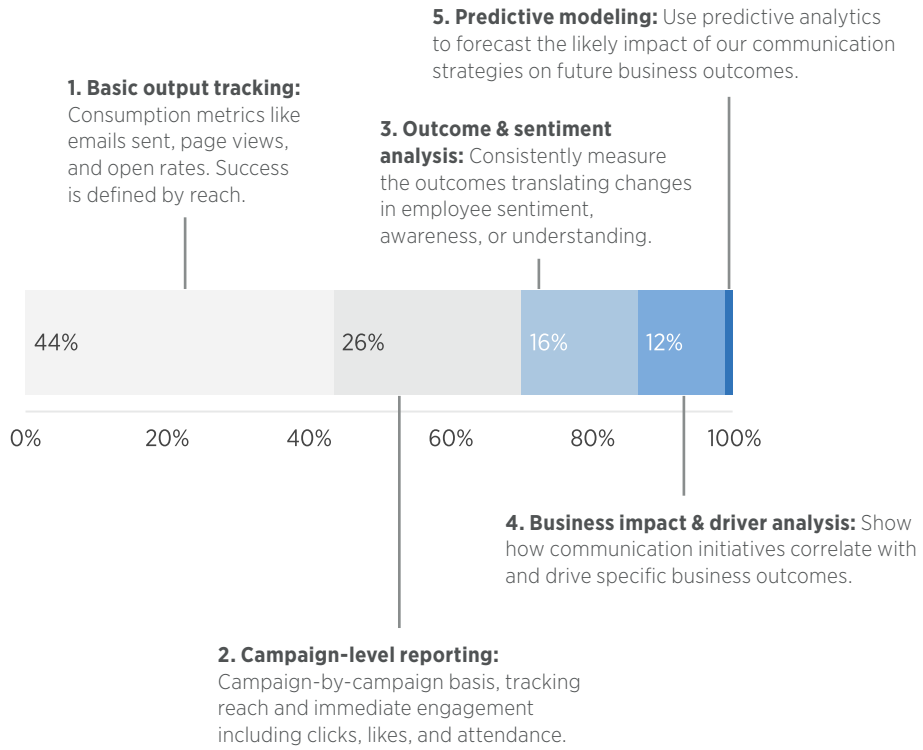
2.5x Champion / Ambassador Network

1.7x Employee Resource Groups (ERGs)

How are we using the available data?

Having access to (and making sense of) data provides the much-needed evidence to IC's most valued goals, but not all data offers the same impact. Easy-to-access data such as opens, clicks, and employee survey data are only part of the sophisticated set of metrics needed to understand value and impact.

Data operating model

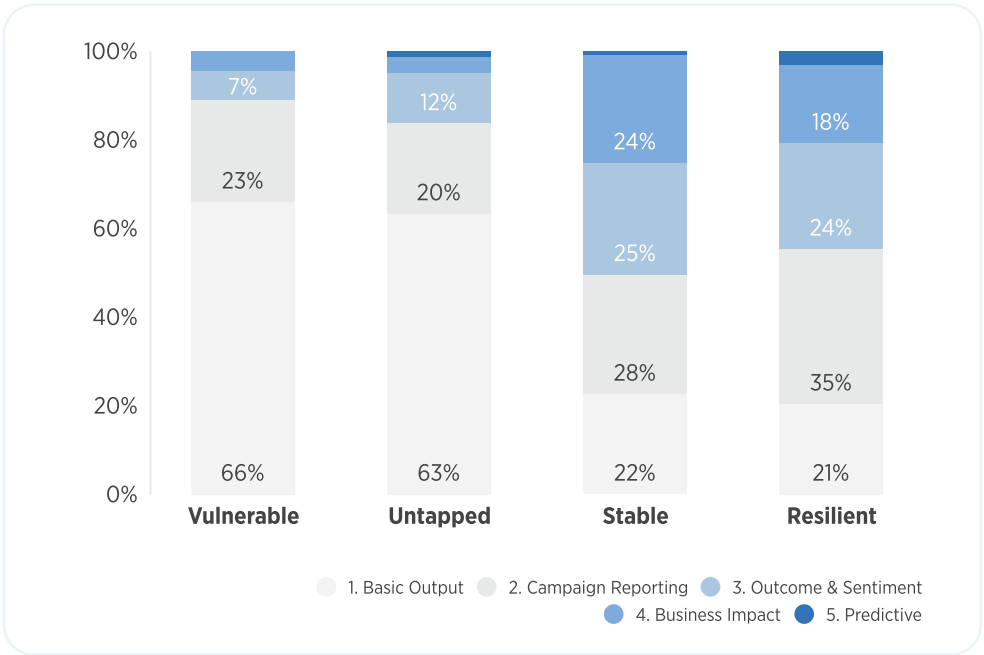


Q. Which statement best describes your function's primary approach to measurement and analytics? (n=474)

The majority of communicators (70%) are stuck tracking activity through basic outputs like opens, clicks, and views. Only 16% are measuring outcomes and only 12% are considering how communications are driving business impact.

Data maturity by segments

Untapped and Vulnerable Segments are dominated by 'Basic Output' tracking.



% of current data maturity model by Readiness segment.

Based on survey responses, we were able to categorize communicators into low, developing, and high data sophistication groups and get a clearer picture of what each group is measuring.

In addition to measuring clicks, those in the high sophistication group were looking at data from across the business including HR-specific metrics and performance data. This group was also the least likely to report feeling that their data sources were siloed or hard to integrate.

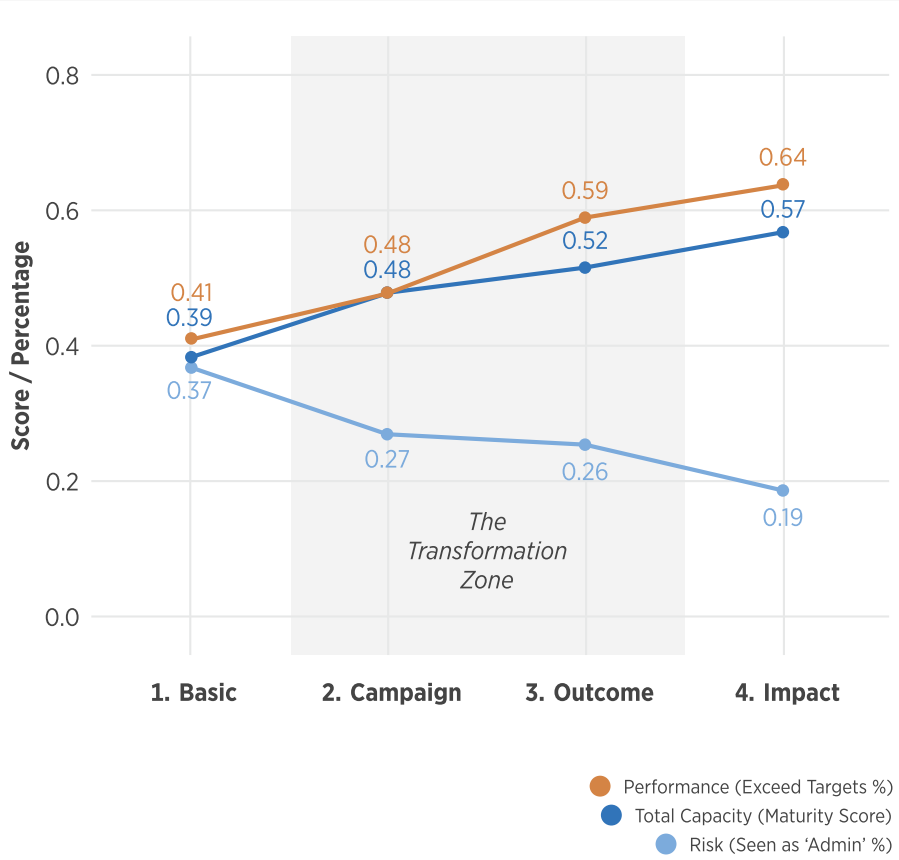
Of teams who reported that their data was siloed, 48% were likely to be only measuring basic outputs. When teams are siloed, it blocks the ability to share meaningful data, degrading IC's ability to measure what has the greatest impact.

True data maturity requires a holistic view of the entire ecosystem. It connects the dots from activity to action (behavior change, sentiment, and adoption) and ultimately to business impact, transforming measurement from simple reporting into proof of value, and the ROI of comms.

The benefits of data maturity

How data can transform the function

As data maturity increases, based on the previous operating model levels 1-4, Capability and Performance rise whilst 'Admin' stigma falls.



Improving your data maturity has a positive ripple effect across many other areas, particularly in the ability to exceed targets and reduce the risk of being seen as an admin function by your organization.

Our data links low data maturity, or only measuring activity, with low performance (only 41% of respondents say they exceeded targets). Once teams start measuring metrics such as sentiment and understanding, performance grows.

Influencing with data

Being excluded from decisions was rated as a top 5 risk by respondents, particularly for those who had low data maturity. Respondents who identified as a Reactive Service Desk are mostly measuring basic outputs (57%) whereas those operating as a Strategic Consultancy have a more balanced measurement approach. By connecting data to business impact, the risk of being labeled as admin is cut in half.

With the huge gap between communicators who say they *want* to function as strategic consultancies (73%) and those who do (18%), we cannot ignore the power that data maturity has to help us bridge that gap.

What data matters vs. what leaders are asking for

Less than one in three leaders are asking for metrics **relating to communication impact on business measures**. According to our respondents, they are primarily asking for metrics related to sentiment (56%) and activity or reach (52%), with only 27% requesting business impact data. This points to a widening gap in between the full business impact of comms and how the function is perceived by leaders: predominantly as an output and operational in nature. Closing this gap requires leaders to be educated on efficacy of communications in terms of risk reduction and for the function to prove its value as a strategic driver of outcomes beyond the operational.

Level 1: Basic output

For low maturity teams, the number one requested metric from leadership is Activity / Reach. Are these organizations stuck in a loop where leaders ask to measure "clicks" so comms works towards tracking and increasing that activity, reinforcing "clicks" as the measure of success?

Level 4: Business impact

For higher maturity teams, the percentage of leaders asking for metrics related to business impact jumps to 22%, compared to only 9.7% for low maturity teams. For this group, the number one requested metric is Employee Sentiment.

Human–centric communication

Driving engagement and impact through comms that connect on a more human level

In a year defined by rising burnout, information overload, and widening trust gaps, the way organizations communicate matters more than ever. Our 2026 data reinforced an instinct many in the IC profession have: engagement isn't driven by broadcasting information—it's driven by the ability to connect emotionally with your audience.

Human-centric communication is how we describe communications that put the individual employee front and center in both tactics (through channel choice and audience segmentation) and tone, while balancing the practical elements of a message with the emotional ones. It's all about communicating in a personalized, relevant, and meaningful way that feels genuine and credible.

This practice has become a strategic capability, enabling teams to cut through noise, reduce perceived risk, and build the clarity employees need to navigate their experience at work with confidence and success.

This year we introduced a new section to the survey asking respondents about specific communication approaches. We found that while many teams understand the value of personalization, relevance, and accessibility, far fewer have the tools, time, or influence to deliver it consistently.

Why segmentation matters more than ever

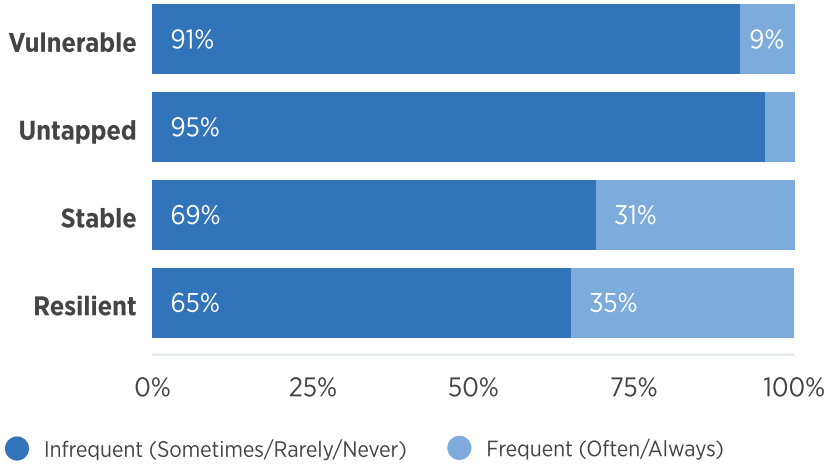
Segmentation remains one of the most powerful—and underused—levers for engagement. While **75%** of respondents agree tailoring messaging is critical, only **20%** do it regularly, and just **18%** are satisfied or very satisfied with their channel's ability to personalize communications.

Teams who do not (or cannot) personalize and segment their comms were likely to report higher perceived risk of burnout and overload. Without the ability to target messages, communicators default to repetition and broad distribution—increasing noise rather than reducing it.

Segmentation is a defining maturity marker across our Readiness segments (although we must acknowledge that, more often than not, environment and technology can have a large impact on this capability). Teams in the Vulnerable Segment struggle most, often reacting to top-down requests with little room to tailor them. High maturity teams use segmentation as a shield, reducing volume while increasing understanding.

Targeting audiences through segmentation

Q. To what extent does your function formally segment internal audiences beyond just department or location? (n=487).



Being an expert on your audience pays off

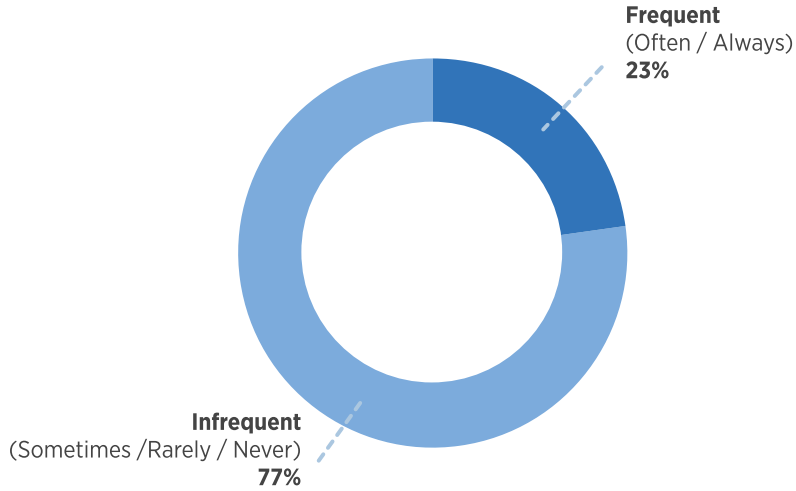
To segment effectively, it's clear that being an expert on your audience is critical. Audience sophistication requires more than job titles or locations. Current, evidence-based personas on a specific topic or targeted outcome allow communicators to model scenarios, test messaging, and tailor their content according to employee mindsets—they are proxy for audience understanding.

Yet adoption remains low: overall, only **23%** use personas regularly. However, among the Resilient and Stable Segments, this rises to nearly **40%**, reinforcing personas as a hallmark of higher maturity teams.

For teams in the Untapped Segment—those with low diagnostic visibility—personas offer a practical starting point to identify potential risks they cannot yet see. Strong performing teams prioritize employee listening, which is a core component of building employee empathy.

Audience profiling adoption

Q. Our process includes developing personas or audience profiles to guide our comms strategy (n=472).



5x

Stable and Resilient Segments are 5x as likely to use audience-based insight on a frequent basis compared to Vulnerable and Untapped.

33%

Consumer & Retail lead in sector terms with 33% frequently using audience insight compared to only 19% from the Finance & Professional Services sector.

50%

Frequency increases to 50% from those who have 'Current and Active' audience research from their comms strategy plans and documentation.

Choosing human-friendly formats

Format choices are shaped by environment, audience, and channel maturity. This year's data shows a decisive shift among high maturity teams toward brevity and visual storytelling.

Teams in the Resilient Segment have modernized their mix, using formats that match how employees consume information today. They lean towards short emails to drive action, while those in the Vulnerable Segment are still leaning on long form email—a legacy habit that contributes to the overload that is common in the high-risk segments.

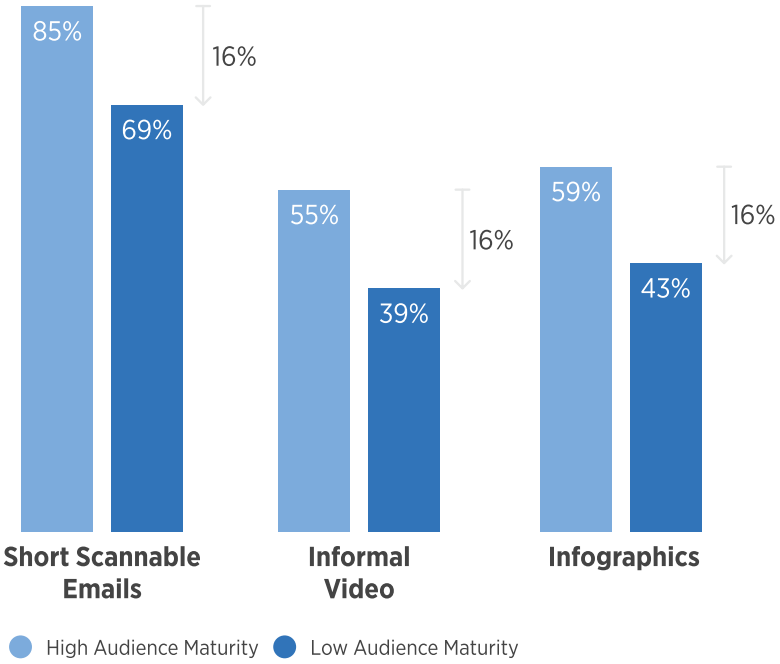
The Resilient Segment is also **1.5x as likely** to use visual formats like infographics and video. They aren't just writing; they are *showing*.

In fact, teams in the Resilient Segment use *more* of almost every format. These teams are using every channel at their disposal to cut through the noise of their high-risk environment. In contrast, Stable teams have lower risk and can afford to be more selective.

We know that different audiences will engage differently with different types and styles of content. This year, we asked about the frequency of using different formats and styles for the same messages. Almost **1 in 2** respondents report doing this frequently.

Those that often used audience segmentation also reported changing up the format of individual messages 60% of the time. In high risk environments, this agility is essential to ensure messages land.

Format usage in high risk communication landscapes



Comparing Low Audience maturity (Resilient / Untapped) to High Audience maturity (Resilient / Stable) segments.

Can tone of voice be a risk reducer?

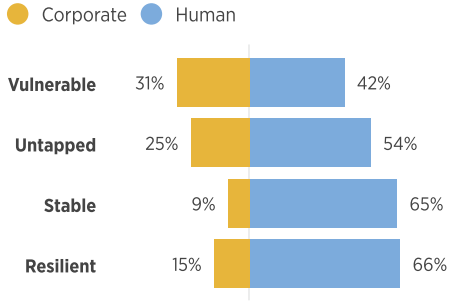
Tone of voice is one of the few execution levers that is primarily within a communicator's control—and it's one of the most impactful.

Respondents who use a human tone (as opposed to more corporate) report lower perceived risks in core areas including low trust of leadership, lack of clear direction, and audience burnout. Playful vs. serious and informal vs. formal tones also show correlations with reduced risk of burnout. In high pressure environments, "professional" often reads as distant while "human" reads as trustworthy.

We also saw communicators using the power of human-driven storytelling in their comms, with 56% of respondents using it regularly to bring strategy, change, and culture to life.

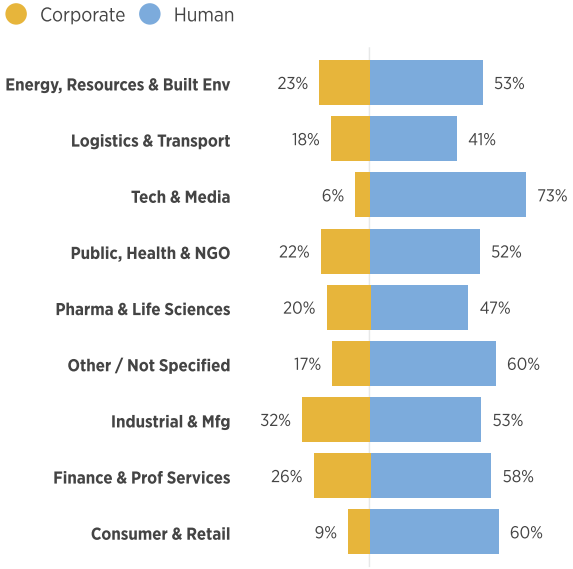
Communication voice: Human vs. corporate

Comparison by Readiness segment.



Communication voice: Human vs. corporate

Comparison by sector.



Percentage leaning towards Human vs. Corporate - remainder % was neutral.

7x Respondents in the Stable Segment are **7x as likely** to sound Human than Corporate.

1.4x Vulnerable Segments are struggling to find the balance with a ratio of **1.4x**.

12x Tech & Media companies are **12x more likely** to sound human than corporate followed by Consumer & Retail at almost **7x**.

1.6x The hardest environment for human tone to survive is Industrial & Mfg with only a **1.6x** human to corporate ratio.

The Human-Centric advantage

Our data shows that adopting a human-centric approach isn't just improving the aesthetics of our comms; it's a performance multiplier.

Teams with high scores in human-centric execution see an 11% lift in the overall effectiveness of their entire channel mix compared to those with low scores. human-centric capabilities (specifically, audience segmentation and a human tone of voice), act as a protective shield, neutralizing the negative impact of high communication volume and preventing information overload even when the business is noisy.

By applying audience segmentation, a human tone, and better formats, high maturity teams are able to extract significantly more value from every channel they use. While teams in the Vulnerable Segment are overwhelmed by the noise, those in the Resilient Segment filter it, ensuring that even in high-pressure environments, the message still lands. They are 1.5x as likely to use "High Fidelity" formats like video and infographics compared to teams in the Vulnerable Segment. Their resilience comes from their ability to adapt the format to the message.

Return on investment: Channel effectiveness uplift

1.6x

With channel effectiveness as a significant part of a communicator toolbox, those with strong audience rigor are **1.6x** ***as*** **likely** to achieve 'Very Effective' channel performance.

2.3x Manager to employees

2.2x Employee self-service

1.4x Company to employees

Blockers to executing more human-centric comms

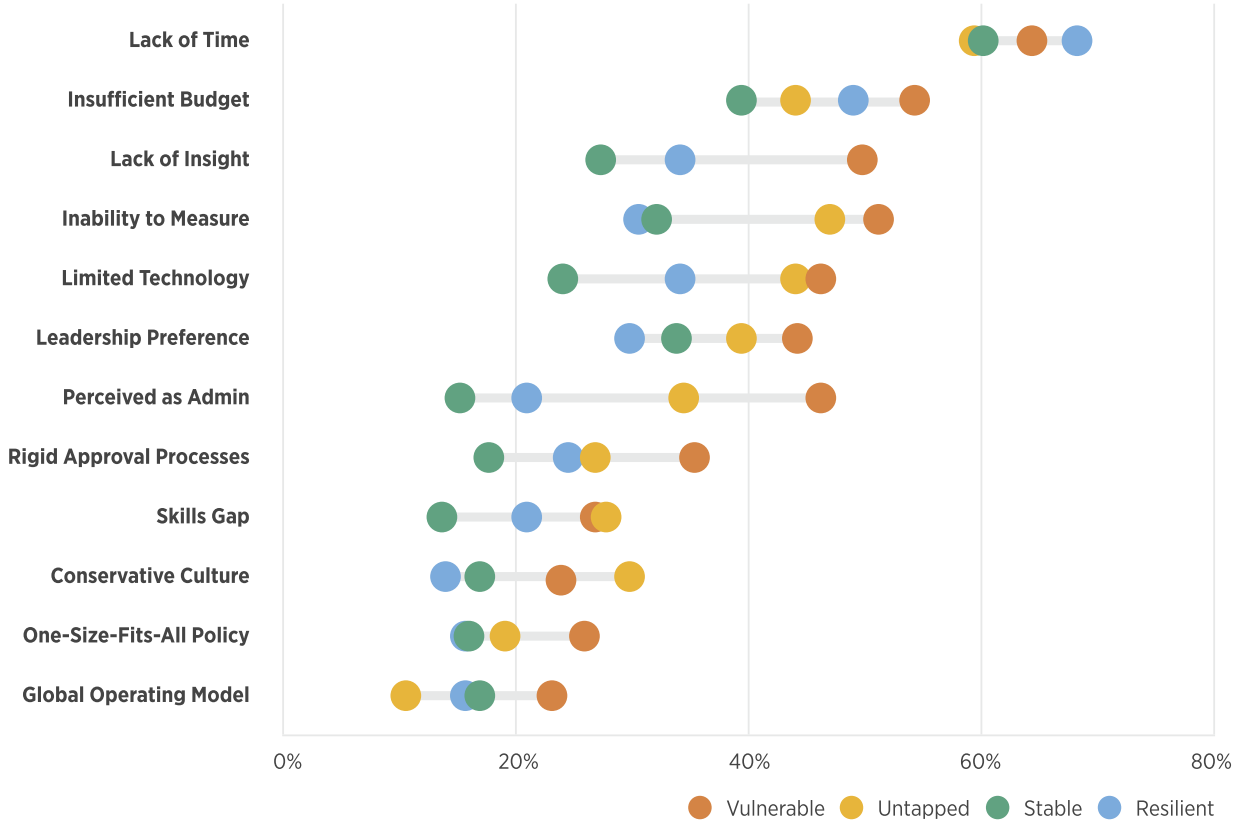
While the value of human-centric communication is clear, execution remains uneven. Across all groups (60–68%), lack of time is the top constraint. Even the Resilient and Stable Segments are drowning in business-as-usual work. High maturity doesn't buy you time, it just helps you use it better.

All teams face time and budget blockers. However, those in the Untapped and Vulnerable Segments are also blocked by permissions: "Leaders won't let us," "Technology limits us," or "We are seen as admin." Of these, being seen as admin by the wider organization is one of the most significant blockers as it also correlates with increased perceived risk in other areas.

The Resilient and Stable Segments, in contrast, have the permission; they simply need to find the capacity.

Human-centric blockers

Barriers preventing audience-first approach to communications by profiles by Readiness segments.



From the desired target operating model, those respondents identifying as 'Reactive Service Desk' were

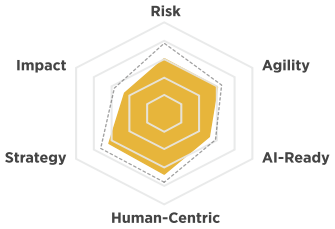
3x as likely

to state being 'Perceived as Admin' compared to those who were operating as a 'Strategic Partner'.

SECTION FOUR

Closing your Readiness Gap

So, you've read the report, reviewed the data, and figured out which segment you or your team aligns with. What next? We have detailed tips and advice on the following pages, organized by segment:



Segment 1 – Untapped

Primary goal: Visibility and connection.

You are building the foundation. Your focus is moving from "quietly getting it done" to "loudly showing your value."

Quick wins (low friction, high visibility)

- ✓ **Write it down**

  Make sure the plan lives outside your head. Draft a single-page strategy covering your function's purpose, priorities, and key channels. If it doesn't fit on one slide, it's too complex.

  - **Why.** The Company Purpose we support.
  - **What.** The Values and Strategic Priorities we must communicate.
  - **Who.** The key audiences we need to align.
  - **How.** The channels and tactics we will use.
  - **When.** The cadence of communication.

- ✓ **Create your "no" list**

  Audit your week. Identify one newsletter, email, or meeting with zero engagement. Stop doing it immediately. Reinvest that hour into strategy.

- ✓ **Get out of your bubble**

  Open your employee directory. Pick 3 random names you have never met. Send a 15-minute invite: "I'd love to learn what you do." Ask them: "What is the one thing you wish you knew about the company but don't?"

- ✓ **The "Friday 5"**

  Start a weekly 5-minute wrap-up email or post. List just 5 bullets of what happened this week. Consistency builds trust faster than creativity.

- ✓ **Spot the recurring word**

  Talk to your workforce, but don't ask about benefits—ask about their experiences. Listen to how people describe their good days. Do they say "fun," "challenging," or "supportive?" That specific word is your authentic communication hook. Start using it in your copy.

- ✓ **Check content quality**

  Run the "So What?" test before sending. Is it clear? Is it relevant? Does it have a call to action? Would a teenager understand it?

Long-term impact (building your structural foundation)

- ✓ **Codify, socialize, and influence**

  Build a simple framework covering your Purpose, Channels, and Measurement. Take it on a "Stakeholder Roadshow." Brief five leaders. Get them to nod "yes."

- ✓ **Build better measurement practices**

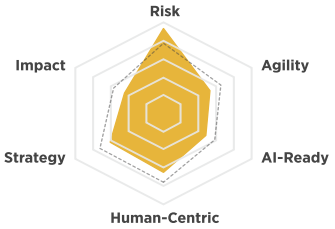
  Stop counting clicks. Start counting "Unreachables." Track who you aren't reaching so you can build a business case for better tools and have better visibility into your mandate.

- ✓ **Become the expert on your audience**

  Learn what your employees want (e.g., frontline audiences desire hyper-localized connection, desk-based audiences cite overload as a big issue) and tailor your strategy to your findings.

- ✓ **Make manager "cheat sheets"**

  Create a 1-page PDF for managers before big announcements. Include talking points, FAQs, and a "What to say in 60 seconds" guide.



Segment 2 – Vulnerable

The goal: clarity and governance.

You are in a high-demand environment. Your focus is triage and simplification to protect your audience from the noise.

Quick wins (immediate relief)

- **The traffic light system**

  Triage every request to manage volume.

  - **Red.** No. Intranet only.
  - **Amber.** Maybe. Cut 50% of the text first.
  - **Green.** Yes. Hits a strategic priority.

  Decide what gets a green rating based on your EVP, channel strategy, and overarching business needs.

- **Subject line surgery**

  Spend 5 extra minutes on email subject lines. Change "Q3 Update" to "3 things that affect your bonus." Watch open rates spike.

- **The "TL;DR" (Too Long, Didn't Read) rule**

  Mandate a summary box at the start of every long email. State: What you need to know. What you need to do. When you need to do it. And keep it concise.

- **Target the value (EVP)**

  Use your content to subtly reinforce your EVP. Consistently link the day-to-day updates to the bigger reasons people work there.

- **Simplify formats**

  Kill the PDF attachment. Replace it with a 3-bullet body email or a simple visual. If they have to click to read, you've lost them.

- **Prioritize clarity**

  Apply a more casual tone. Swap "leverage" for "use" and "facilitate" for "help." A human voice cuts through the noise.

Long-term impact (building the levees)

- **The approval "SLA"**

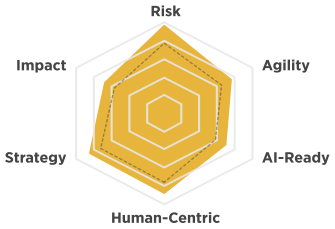
  Publish a Service Level Agreement. "To guarantee quality and save time, we must receive content 48 hours in advance." Stick to it.

- **Segment by role**

  Not everything should be an "All Company" blast. Tailor at least one key message per month for your different audience groups.

- **Governance calendar**

  Build a shared publishing calendar. Implement a strict "One in, One out" policy to protect attention spans.



Segment 3 – Resilient

The goal: precision and agility.

You are operating at a high level. Your focus is creating speed and connection using data and emotional intelligence.

Quick wins (agility & impact)

- ✓ **Double down on storytelling**

  People remember stories, not stats **(we're aware of the irony here)**. Use video and infographics for strategy updates. Put a face to the business.

- ✓ **The "promise kept" narrative**

  Frame your success stories as "promises kept." If your EVP promises innovation, don't just announce a new product—announce it as "Another way we are delivering on our promise to innovate."

- ✓ **Leverage AI for speed**

  Use AI for drafting, summarizing, and generating headline options. Use the saved time for strategic thinking.

- ✓ **Micro-pulse polls**

  Stop waiting for annual surveys. Drop a one-question poll in Teams (or similar platform) every two weeks. "How confident do you feel about Change X?" Pivot based on real-time data.

- ✓ **Video shorts**

  Film a 30-second update on a smartphone. Authenticity beats production value in high-risk environments.

Long-term impact (systemic resilience)

- ✓ **Measure behavior**

  Move beyond clicks. Did they sign up? Did they adopt the new tool? Measure the action, not the eyeballs. Review your measurement approach and align it more tightly with desired behaviors and business impact.

- ✓ **Formalize a change playbook**

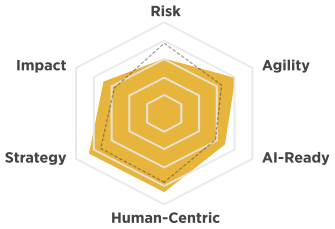
  Prepare for, don't react to change. Create a "Change Comms in a Box" kit with playbooks for both creating long-term behavior change and for short-term or crisis comms. Include a narrative template, FAQ builder, and ADKAR checklist. Grab it and go when crisis hits or use it as a starting point for major shifts.

- ✓ **The "change champion" network**

  Recruit influencers from different departments. Give them early access to your FAQs and change narrative. They will squash rumors faster than you can.

- ✓ **Scale personalization**

  Invest in the data cleanup required to segment by location or function automatically. Make relevance the default.



Segment 4 – Stable

The goal: influence and integration.

You are the architect. Your focus is shifting from "running comms" to "shaping the business."

Quick wins (elevating the conversation)

- ✓ **Show ROI**
  Every report should answer: "We communicated X, which led to Y business result." Use visuals and charts.
- ✓ **The "board pack" slide**
  Fight for one slide in the monthly executive Board Pack. Report on "Workforce Sentiment & Risk," not just activity.
- ✓ **Match the external vibe (EVP)**
  Audit your internal tone against the external brand. If the customer brand is bold and exciting, but your internal emails are formal and dull, you have a gap. Bring the external energy inside.
- ✓ **Refresh formats**
  Experiment. Try an interactive PDF, a podcast series, or a gamified quiz. Keep the channel mix fresh.
- ✓ **External inspiration**
  Stop looking at other IC teams. Look at consumer marketing. Are you inspired by a campaign idea from Nike or Spotify? Identify what pulled you in, then tailor it to your brand and desired behavioral outcomes to avoid the final product feeling like a gimmick.

Long-term impact (future-proofing)

- ✓ **Create a playbook and activate AI**
  Codify your tone and standards into a digital playbook. Then, if you have access to AI tools, you can then use agentic capabilities on your data to check content quality instantly. Not sure how that would work? Invest a few hours into upskilling yourself on the capabilities of tools like AI Agents and workflow automation.
- ✓ **Advance AI adoption**
  Move from drafting to insights. Use AI to analyze open-text feedback for sentiment trends or predict burnout hotspots.
- ✓ **Invest in human-centric design**
  Run a full accessibility audit. Ensure every channel is inclusive, mobile-ready, and neurodiverse-friendly.
- ✓ **The "listening" ecosystem**
  Integrate data from IT tickets, HR attrition rates, and Glassdoor reviews into a single "Employee Voice" report. Connect the dots.

Methodology

The Employee Communications Report research was developed as part of our ongoing series of global communications trends continuing the State of the Sector and building on themes for the last 18 years.

This year the research reflects the voice of over 1,300 communications and HR professionals globally. This broad participation provides a comprehensive snapshot of the industry across various sectors, geographies, and organization sizes. Our mixed-methods approach—combining these survey insights with qualitative data from roundtables and focus groups—ensures the trends identified are both wide-reaching and deeply contextual. The roundtables and focus groups were live in September / October in 2025 and the Survey was open during November 2025.

Scoring and segments

A collection of composite scores was generated after applying standard data quality techniques, using only complete responses as part of the analysis. These scores were used to understand patterns and cohort comparison through statistical techniques and driver analysis.

Percentages have been rounded for simplicity.

Your people are your organization's greatest asset

But daily hardships—like economic uncertainty, personal, and family health concerns, and insufficient resources or staffing at work—can take a toll on your people and leave your business struggling with hindered productivity, heightened disengagement, and strained retention.

That's why every aspect of your benefits and compensation program needs to work in concert to promote overall employee wellbeing. Offering robust medical coverage and a competitive retirement plan isn't enough in today's hyper-competitive labor market.

As employees across all geographies, industries, and employer types navigate the ever-changing world, organizations must critically evaluate their people's experience in the workplace—finding unique ways to engage teams, establish authentic connections, and support employee wellbeing overall.

Doing so can help your business attract top talent, motivate employees, and shift the organizational culture so employees feel differently about their work. When organizations find ways to reduce burnout and increase productivity among their people, business performance can soar.

This is why your people are at the center of what we do. Gallagher offers a comprehensive approach for strategically investing in benefits, compensation, retirement, employee communication, and workplace culture so you can support your people's physical and emotional health, financial confidence, and career growth at the right cost structures.

From evaluating the demographics of your workforce to surveying and analyzing competitor trends, Gallagher offers you data-driven insights—allowing you to make the most of your investment in talent, deliver a better people experience, and reduce organizational risk.

Even in times of uncertainty, Gallagher's consultants are here to help you optimize your profitability with a strategy rooted in the wellbeing of your people—so you can face the future with confidence.

Arthur J. Gallagher & Co. (NYSE: AJG), an international insurance brokerage and risk management services firm, is headquartered in Rolling Meadows, Illinois; has operations in 68 countries; and offers client-service capabilities in more than 130 countries around the world through a network of correspondent brokers and consultants.

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Changing lives with world-class employee communications

We create communications that engage employees, change behaviors, and drive business outcomes.

From AI adoption and change management to EVP and communications strategy, we partner with organizations to deliver award-winning employee experiences.

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