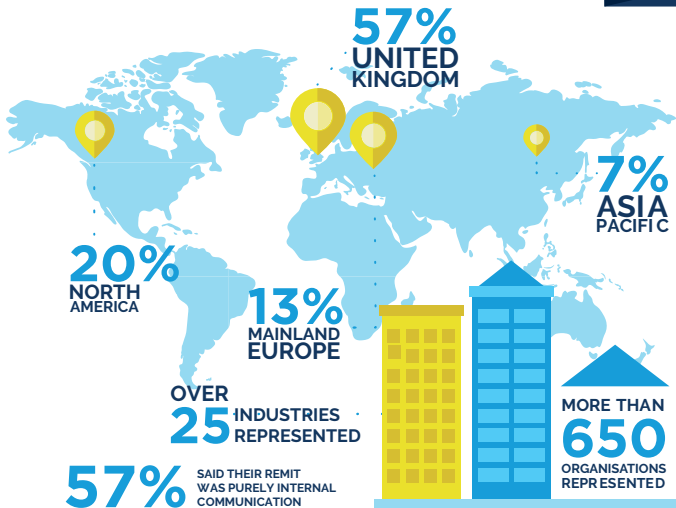


WHO TOOK PART



THE MICROSOFT OFFICE 365 EFFECT IS GAINING MOMENTUM



1/2 OF RESPONDENTS HAVE IMPLEMENTED OFFICE 365

21% AND PLAN TO DO SO



56% **49%** SHAREPOINT AND YAMMER

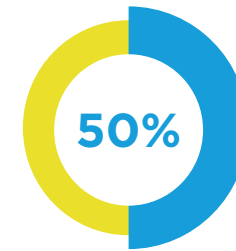
DOMINATE THE SCENE ALMOST TO THE EXCLUSION OF ALL OTHER TECHNOLOGIES.

47% **vs.** **61%**

OF RESPONDENTS WORKING FOR ORGANISATIONS WITH OFFICE 365 NAMED TECHNOLOGY AS A BARRIER

OF THOSE WITHOUT IT

LESS REACTIVITY, MORE STRATEGY



OF RESPONDENTS HAVE A WRITTEN INTERNAL COMMUNICATION STRATEGY

BUT



SAY THAT DEVELOPING AN IC STRATEGY WILL BE A PRIORITY IN 2018

TOP 3 ACTIVITIES

| | 2017 | 2018 |
|---|------|--|
| 1 | 92% | 89% CORPORATE ANNOUNCEMENTS |
| 2 | 90% | 88% HELPING EMPLOYEES UNDERSTAND THE STRATEGY |
| 3 | 89% | 86% EMPLOYEE ENGAGEMENT |

IMPACT MEASUREMENT STILL ISN'T A PRIORITY



INDEPENDENTLY CONDUCTED COMMUNICATION AUDITS WERE RATED AS VERY EFFECTIVE BY OVER...

20% **YET ONLY**

14% HAVE USED THIS IN THE PAST THREE YEARS.

LINE MANAGERS ARE STILL THE BATTLEGROUND



BUT COMMUNICATORS ARE INCREASINGLY RELYING ON DIGITAL CHANNELS



IMPROVING DIGITAL CHANNELS IS SEEN AS THE **SECOND** BIGGEST PRIORITY FOR 2018



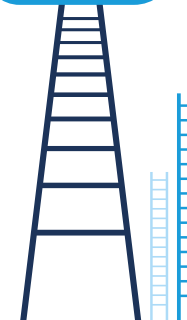
WANT TO INCREASE USAGE OF MOBILE APPS, SOCIAL ENTERPRISE NETWORKS AND CHATBOTS

TOP THREE MOST EFFECTIVE DIGITAL CHANNELS

- 79%** EMAIL ANNOUNCEMENTS
- 78%** VIDEOS
- 75%** ELECTRONIC NEWSLETTERS

EUROPE AND NORTH AMERICA ARE FOLLOWING DIFFERENT TRAJECTORIES

LONG-TERM PLANNING:



69% **vs.** **80%**

HAVE LONG-TERM IC PLANNING IN NORTH AMERICA

IN EUROPE

DIFFERENT PRIORITIES:



EUROPE IMPROVING LINE MANAGER COMMUNICATIONS



NORTH AMERICA BETTERING LEADERSHIP COMMUNICATIONS

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