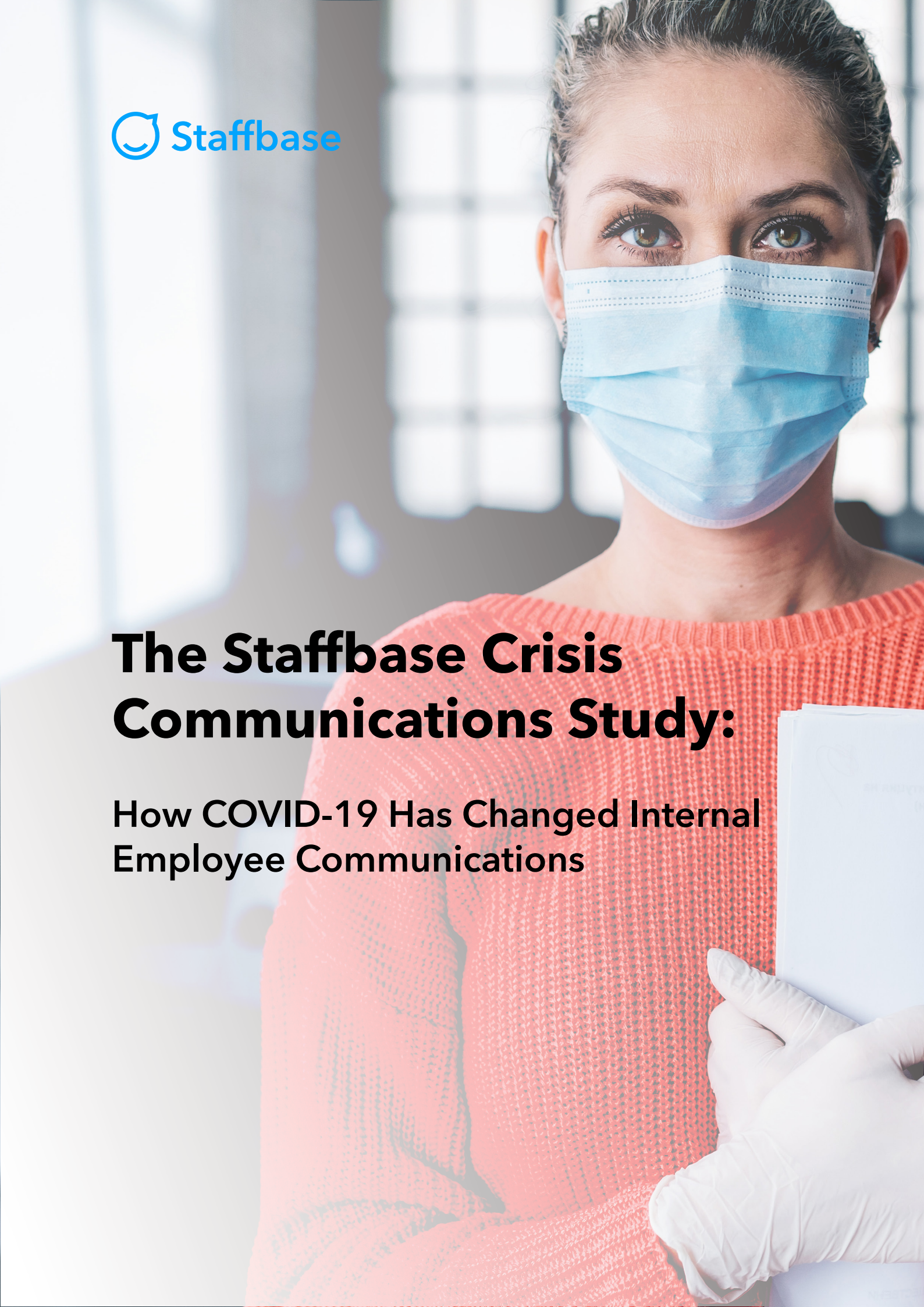




The Staffbase Crisis Communications Study:

How COVID-19 Has Changed Internal Employee Communications



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The internal communications industry has been undergoing a massive transformation during the coronavirus crisis. In most cases, these changes were rapid as global quarantine made previous channels of communication less effective for engaging employees who found themselves working from home, furloughed, or out in the field as emergency personnel.

1. HOW HAS THE WORK OF INTERNAL COMMUNICATORS CHANGED?

Excluding official institutions like hospitals or the WHO, employers are the source to which people attribute the highest credibility in times of crisis (Edelman 2020). Moreover, it has been shown that employees have a much higher level of trust in their employer when they're receiving regular updates (Weber Shandwick & KRC Research 2020). The demands of the workforce for fast and transparent communication have replaced prior skepticism during the current crisis—employees want to know what the company knows, doesn't know, and how it intends to act (OrangeFierly 2020). **No company can afford to ignore their workforce anymore.**

2. THE DESIGN OF THE STUDY

A few weeks after the onset of the COVID-19 crisis, Staffbase conducted a global empirical study on the impact of the crisis on the work of internal communicators using the following ten questions:

1. *What influence does the crisis have on your company and its internal communication?*
2. *What are the biggest challenges you face during the crisis?*
3. *How well prepared are you for the crisis scenario?*
4. *Does your team have the necessary skills for its tasks during the crisis?*
5. *Do you have a written crisis plan for employee communication and if so, how up-to-date is it?*
6. *Which form of media do you use for employee communication?*
7. *What problems do you see in the distribution of your content?*
8. *How will the crisis experience affect the budget for internal communications in the coming years?*
9. *Which projects do you want to prioritize even more in the future based on your crisis experience?*
10. *Which functionality of an employee app is particularly beneficial for companies in a crisis?*

The survey was conducted using the internet-based survey tool SurveyMonkey between April 1–13, 2020 and distributed via email, LinkedIn, XING, Twitter, and Facebook.

3. THE RESPONDENTS

A total of 432 participants from across the globe filled out the survey. A look at the data (Fig. 1) shows that about a third of the respondents came from medium-sized organizations with more than 1,000 and a maximum of 10,000 employees (32%) while small companies with less than 250 employees were equally represented (32%). Organizations with 250–1,000 employees (23%) and large companies with more than 10,000 employees (13%) were also among those surveyed.

Number of Employees of the Evaluated Organizations

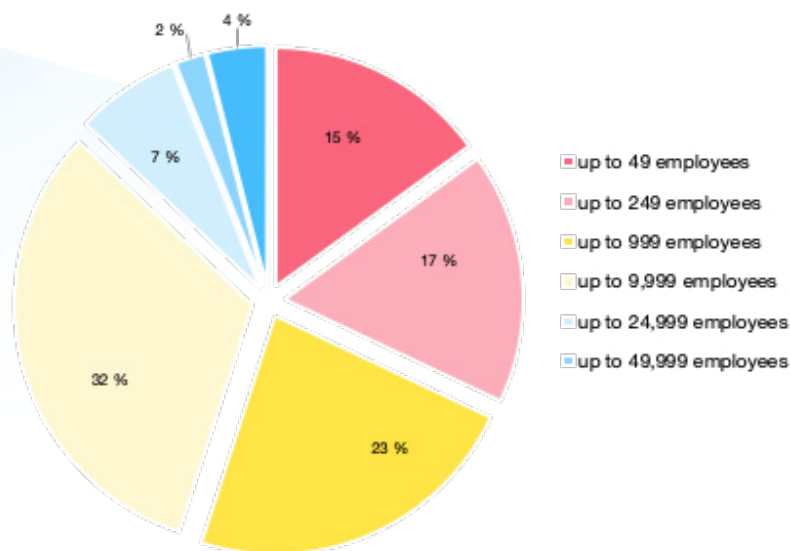


Figure 1: Number of Employees of the Evaluated Organizations
n = 333 internal communicators worldwide. Q14: How many people are employed in your organization?

4. COMPARATIVE STUDIES REFERENCED

The comparative studies referenced in this report include:

Pre-Coronavirus:

1. **SCM Trend Monitor Internal Communication 2019** (February to March 2019; N=251 internal communicators)
2. **Benchmarking Digital Employee Communication of the University of Leipzig** (December 2019 to January 2020, N=371 internal communicators).

**The replication of selected questions from these studies for internal communication allows for the comparison of answers before the crisis with answers during the crisis.*

During Coronavirus:

1. **PRovoke & ICCO Global Industry Survey** (March 2020, N=105 in-house communicators)
2. **COVID Report of the Institute for PR & Pepercomm** (March 2020, N=300)

**Addressed all types of communicators. These surveys are intended to give an indication of whether internal communicators offer significantly different responses.*

5. FINDINGS

5.1 The COVID-19 crisis affects the work of most internal communicators.

Almost half of the internal communicators surveyed (48%) are convinced that the coronavirus crisis will negatively influence the success of their company in the next three months (Fig. 2). Around 33% of respondents are undecided and only 19% of those surveyed expect a positive development. This is roughly in line with the findings of other studies on corporate development, such as the Sellics 2020 survey on the impact of COVID-19 on e-commerce.

Impact of the COVID-19 Crisis on Corporate Success in the Following 3 Months

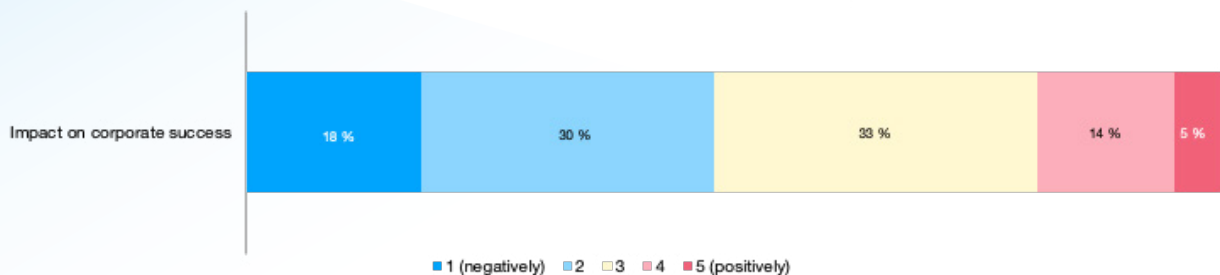


Figure 2: Impact of the COVID-19 Crisis on Corporate Success in the Following 3 Months

N = 432 internal communicators worldwide. Q2: How do you think the COVID-19 crisis will impact your business over the next three months?
Answer options: 1 (negatively) - 5 (positively).

Roughly three-quarters (77%) of internal communicators also state that the coronavirus crisis is affecting their work (Fig. 3). 48% of respondents from this group are convinced that the crisis has an extreme impact on their work. Only 12% of those surveyed feel that it has no influence and a similar percentage are unsure (11%). This result confirms the initial thesis that the professional field of internal communication is undergoing a major change as a result of the Corona crisis.

Impact of the COVID-19 Crisis on the Work of Internal Communicators

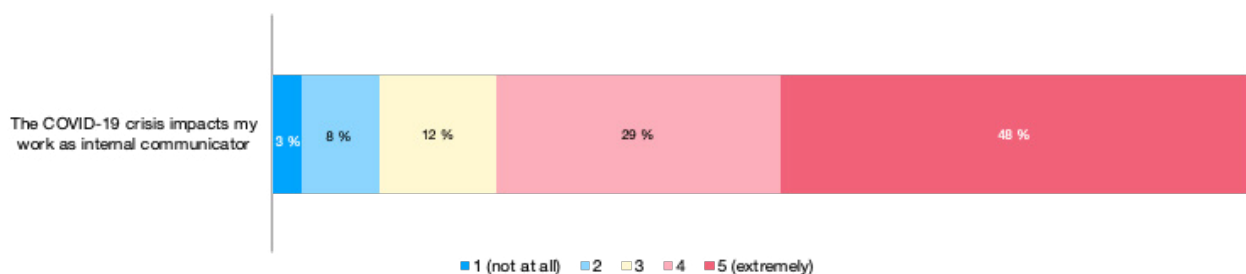


Figure 3: Impact of the COVID-19 Crisis on the Work of Internal Communicators

N = 432 internal communicators worldwide. Q1: In general terms: How strongly does the COVID-19 crisis influence your work as an internal communicator?
Answer options: 1 (not at all) - 5 (extremely).

5.2 The biggest challenge before and during the crisis is effectively reaching all employees with messages.

A survey of the biggest challenges for internal communicators during the crisis (Fig. 4) showed that by far the biggest problem for respondents was reaching all employees with the company's messages (56%). They also struggle with identifying relevant content (45%), outdated technical infrastructures (44%), and a lack of time (36%).

Challenges of Internal Communication Before and During the COVID-19 Crisis

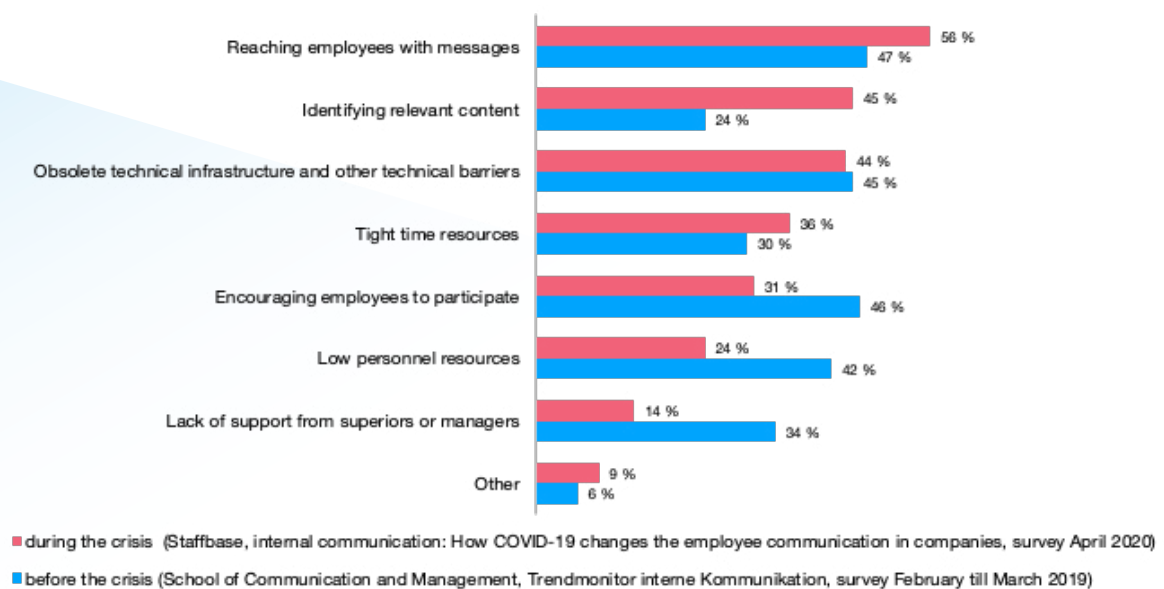


Figure 4: Challenges of Internal Communication Before and During the COVID-19 Crisis

N = 432 internal communicators worldwide. Q3: What are the three main challenges internal comms has to face during COVID-19 crisis? (maximum three answers possible) The red bars show the results of the survey „Internal Communication: How COVID-19 changes the Employee Communication in Companies“ which was implemented during the crisis in April 2020. The blue bars show the results of the German survey „Trendmonitor interne Kommunikation“ (N = 251), which was implemented before the crisis (survey February - March 2019).

A comparison with the Trend Monitor for Internal Communication, last conducted in spring 2019 before the coronavirus crisis, confirms these findings. In both studies, reaching all employees was reported as the greatest challenge for internal communicators (Trend Monitor 2019 = 47%; Staffbase Crisis Comms Study = 56%). The annoyance surrounding technical hurdles also made it into the top three challenges both times (Trend Monitor 2019 = 45%; Staffbase Crisis Comms Study = 44%).

There are differences, however, in that internal communicators rated the task of “getting employees to participate more strongly” as being more challenging before the crisis than during it (Trend Monitor 2019 = 46%; Staffbase Crisis Comms Study = 31%). The opposite is true of the task of “identifying relevant content,” which was seen as less of a problem before the crisis than during it (Trend Monitor 2019 = 24%; Staffbase Crisis Comms Study = 45%).

During the crisis, the lack of time is seen as being more critical (Trend Monitor 2019 = 30%; Staffbase Crisis Comms Study = 36%), whereas one year before the crisis there were more complaints about staff shortages (Trend Monitor 2019 = 42%; Staffbase Crisis Comms Study = 24%).

5.3 In times of crisis, the focus of internal communication shifts to the dissemination of information and less on employee participation.

While internal communicators still saw the dissemination of information as one of the top two of their greatest challenges to motivate employee participation in 2019, this response fell to fifth place during the coronavirus crisis. The challenge of identifying relevant content, on the other hand, rose from seventh to fourth place.

5.4 Internal communicators feel less prepared for the crisis than their general communicator counterparts.

Almost half of the respondents (42%) think that their internal communication is well prepared for crisis (Fig. 5, upper bar). 29% are unsure and 28% admit that they are not well prepared.

How Prepared are Internal Communicator for COVID-19?

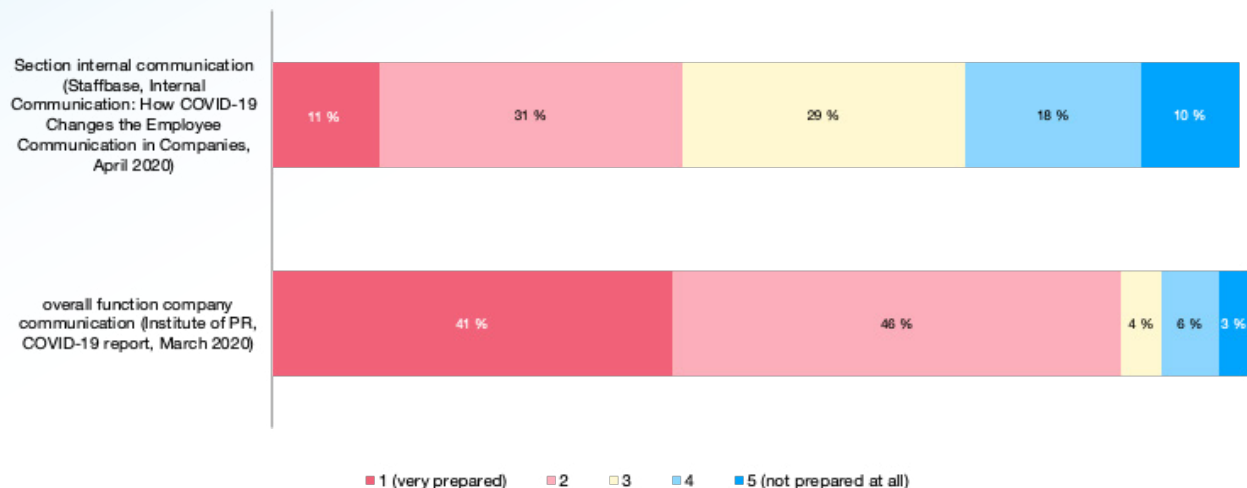


Figure 5: How Prepared are Internal Communicator for COVID-19?

N = 432 internal communicators worldwide. Q4: How prepared is your internal comms function for COVID-19? scale 1 (very prepared) – 5 (not prepared at all). The question of the Institute of PR (N = 300) was accurately replicated in the present study.

This result was compared to the COVID-19 report from the Institute for PR & Peppercomm, which in March 2020 surveyed not only internal communicators but external corporate communications representatives (Fig. 5, lower bar). While 87% of the communicators in the comparative study stated that they felt (very) well prepared (Institute for PR & Peppercomm 2020), only 42% of the internal communicators Staffbase polled claimed to be so. Further, almost a third (28%) of internal communicators feel (rather) unprepared, whereas only 9% of their corporate comms counterparts in the overall industry survey felt similarly.

When compared to the communications industry as a whole, internal communicators thus appear to be either reluctant in their self-assessment or genuinely less prepared. Another possible explanation is that the US study was conducted at an earlier stage of the crisis and that the assessment could change significantly during the course of the crisis as a result of greater pressure.

5.5 Not all internal communication teams have the necessary competencies for their tasks during the crisis.

59% of respondents are (very) sure that their internal communications team has the right skills to deal with the COVID-19 crisis (Fig. 6). Roughly a quarter of respondents (22%) are undecided and 19% do not believe that their team's skills are sufficient. This result is roughly in line with the findings of the PProvoke study on the developments in the communications industry at the beginning of the coronavirus pandemic in March 2020 (PProvoke & ICCO 2020).

Do Internal Communicators Have the Necessary Competences for Crisis Communication?

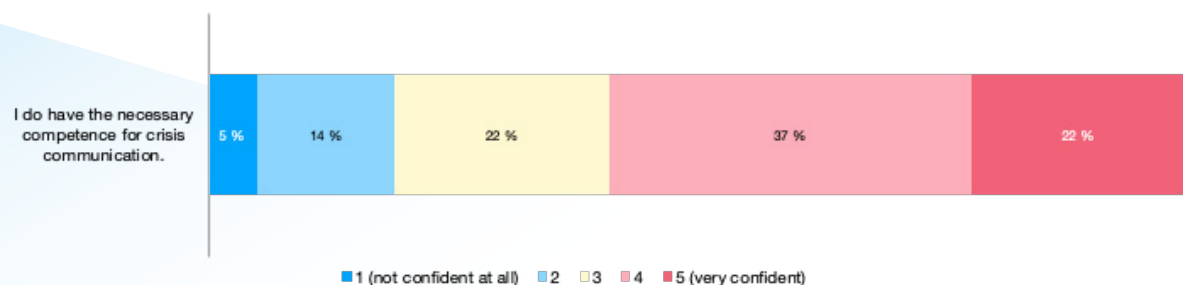


Figure 6: Do Internal Communicators Have the Necessary Competences for Crisis Communication?

n = 387 internal communicators worldwide. Q7: How confident are you that your communications team has the right skills to deal with the COVID-19 crisis? scale 1 (not confident at all) – 5 (very confident).

5.6 Internal communicators still lack written crisis plans.

In the 2019 Trend Monitor, 50% of those surveyed already stated that they had no written concept for their internal communication (SCM 2019). This figure remained similar in the Staffbase study, with 54% reporting not having a written plan for crisis communication (Fig. 7).

Do You Have a Written Plan for Internal Crisis Communication?

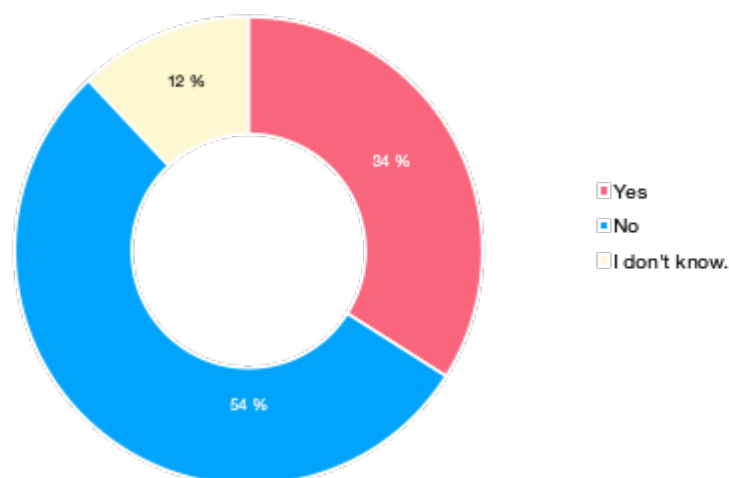


Figure 7: Do You Have a Written Plan for Internal Crisis Communication?

N = 432 internal communicators worldwide. Q5: Do you have a written plan for internal crisis communication?

According to the respondents, roughly only one quarter of the crisis plans (27%) are really up to date (Fig. 8). This falls in line with the findings of the US Institute for PR (23%), which surveyed not only internal communicators but the entire industry (Institute for PR & Peppercomm 2020).

What Is the Current Status of Your Written Internal Crisis Communication Plan?

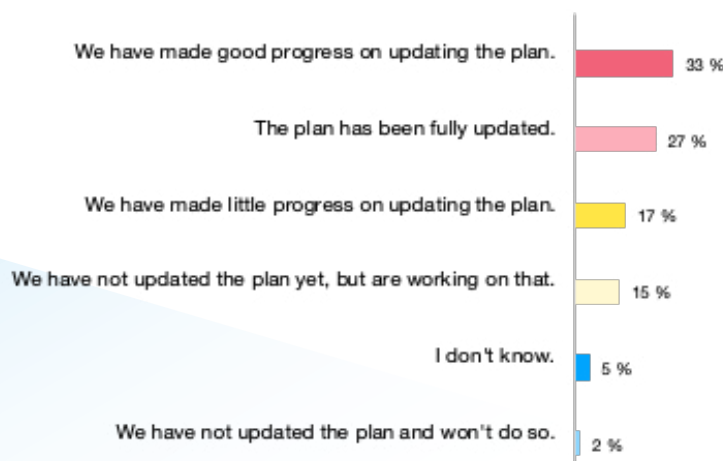


Figure 8: What Is the Current Status of Your Written Internal Crisis Communication Plan?

n = 126 internal communicators worldwide. Q6: What is the current status of your written internal crisis communication plan?

However, the majority of internal communicators (65%) are only just beginning to or are still planning to update their contingency plan. The extent to which this is being done systematically in the face of time pressure and the lack of resources needs to be examined separately.

5.7 Traditional digital channels of communication are still relied on heavily.

Internal communicators reported using email distribution lists most frequently to inform their workforces (Fig. 9). Intranets come in second place among the (very) frequently used media, followed by virtual staff meetings.

Significantly less often, internal communicators choose social intranets, physical staff meetings, and bulletin boards. Other media such as traditional employee meetings, digital signage, employee newspapers, or company TV are rarely or never used in times of crisis.

In comparison to the 2019 Trend Monitor, carried out approximately one year before the coronavirus crisis, there are significant differences. The most frequently used channels of internal communicators before the crisis (personal conversation, employee meetings, and grapevine communication) lost importance and currently rank significantly behind email newsletters and the intranets as mediums for employee communication.

Most Used Channels for Internal Communication During Crisis

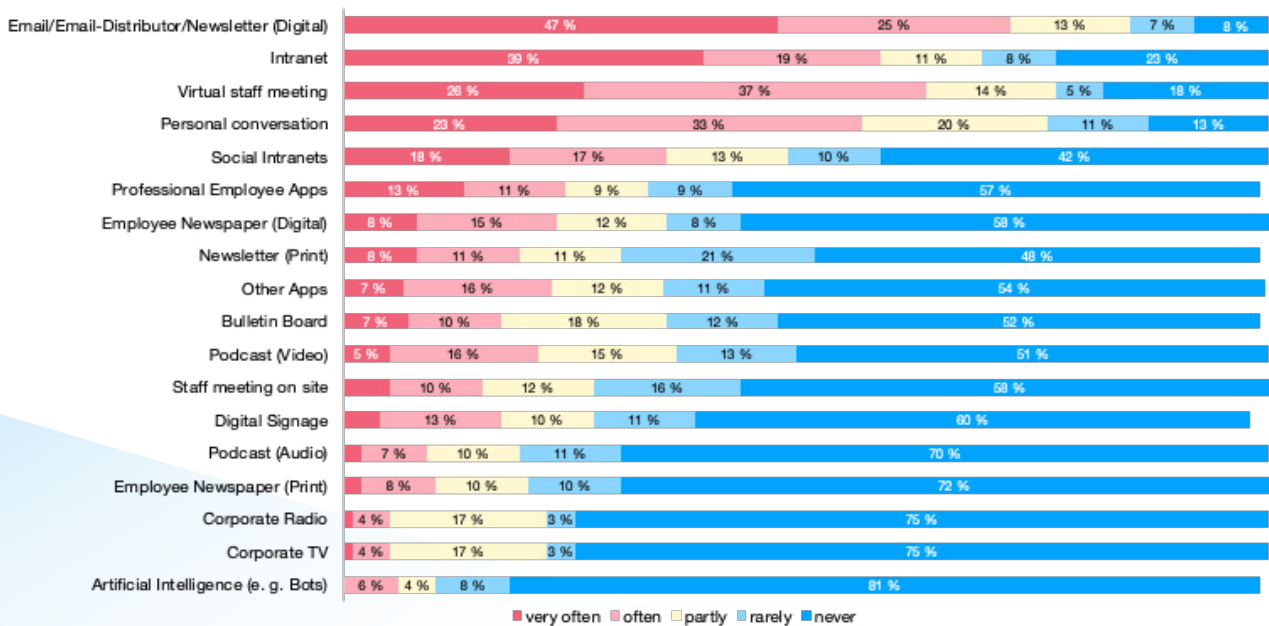


Figure 9: Most Used Channels for Internal Communication During Crisis

n ≥ 386 internal communicators worldwide. Q8: How often do you use the following tools for employee communication to distribute content during the COVID-19 crisis? scale 1 (very often) – 5 (never).

Top Eight Media Formats Before and During the Crisis:

Top	Before the Crisis (Trend Monitor 2019)	During the Crisis (study internal crisis communication 2020)
1	Personal conversation	Email/Newsletter
2	Staff Meeting	Intranet
3	Grapevine Communication	Personal Conversation
4	(Social) Intranet	Leaflets/Circulars
5	Leaflets/Circulars	Virtual staff meeting
6	Bulletin Board	Social Intranet
7	Employee NewsLetter	Apps
8	Newsletter	Apps

The extent to which “modern digital channels” (social intranet or apps) are gaining importance for employee communication can only be assumed, but more notably they are listed among the top eight most important internal media channels for the first time.

5.8 Digital formats win during crises.

If one takes a look at the transformation of classic content mediums—staff meetings, bulletin boards, and company newspapers—clear trends can be seen:

Classic employee meetings are only used often or very often by 15% of those surveyed during the crisis; virtual ones by 63%, likely due to quarantine restrictions.

A similar comparison can also be made with employee newspapers—only 19% of those surveyed said they use a print version often or very often. This is roughly a quarter of those who already use a digital version (72%). It can be assumed that the comparatively long production time of a paper newspaper is an obstacle to the rapid dissemination of information in times of crisis. Preferences for bulletin boards and digital signage have remained the same. As during the crisis, internal communicators prefer bulletin boards, even though both mediums are used relatively little during the coronavirus pandemic. 17% use bulletin boards often or very often while the same percent use digital signage.

5.9 The greatest challenge for distributing content is choosing the appropriate channel.

When it comes to the distribution of content during the crisis, internal communicators see their greatest challenge in choosing appropriate channels (Figure 10). They tend to find it rather difficult to judge when content should be published.

Challenges with Distributing the Content for Internal Communication

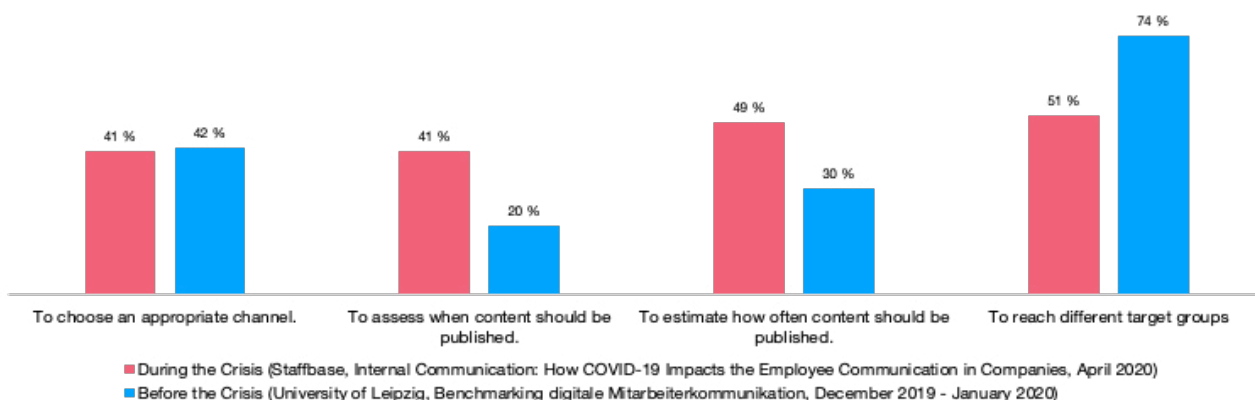


Figure 10: Challenges with Distributing the Content for Internal Communication

n = 355 internal communicators worldwide. Q11: What challenges are you facing in the COVID-19 crisis regarding the distribution of content? (A major challenge in content distribution is...) Scale: 1 (do not agree at all) – 5 (fully agree). Percentages are based on the scale presented in figures 4 and 5. The question in Benchmarking digitale Mitarbeiterkommunikation of University of Leipzig (N = 371) was accurately replicated in the present study.

Less challenging, but still a problem for 49% of respondents is how often content is published and how often it reaches different audiences (41%). In the benchmark study conducted by the University of Leipzig two months before the outbreak of the crisis, the ranking looked different—reaching the various target groups was the biggest challenge, but the choice of appropriate channels came second by a clear margin.

Before the crisis, communicators seem to have found it easier to assess how often and when content needs to be distributed. During the crisis this became more difficult.

5.10 The crisis isn't expected to influence future budgets.

With regard to the budget for internal communications, 59% of those surveyed believe that it will not change in the coming year due to the coronavirus crisis (Fig. 11). 20% think the budget will be reduced, while the same percent expect an increase.

Budget Changes for Internal Communication After COVID-19 Crisis

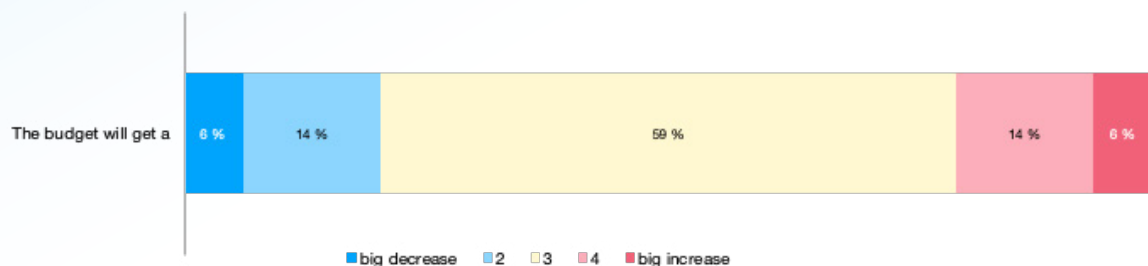


Figure 11: Budget Changes for Internal Communication After COVID-19 Crisis

n = 355 internal communicators worldwide. Q12: How will the budget for internal communications in your business change during the COVID-19 crisis throughout the next year? Scale: 1 (big decrease) – 5 (big increase).

These results are similar to those of the PProvoke & ICCO study on the effects of the crisis on corporate communications in the US (PProvoke & ICCO 2020). There, 48% of those surveyed estimated that the budget would remain stable in the future, 35% expected it to decrease, and 17% believed it would increase.

5.11 Digital internal communication will be given higher priority after the crisis.

As Trendmonitor 2019 shows, the following five projects are on the to-do lists of internal communicators (Fig. 12).

More than half of the respondents agree that digitization strategy for internal communications must be given higher priority after the crisis (56%) and that employees must be given better opportunity to access corporate messaging via their smartphones (47%). Almost half of those surveyed plan to develop a strategic concept for employee communication (57%). The expansion and restructuring of the intranet (44%) and better employee branding (24%) are also increasingly important.

Which Projects Would You Prioritize for Future Crisis Comms?

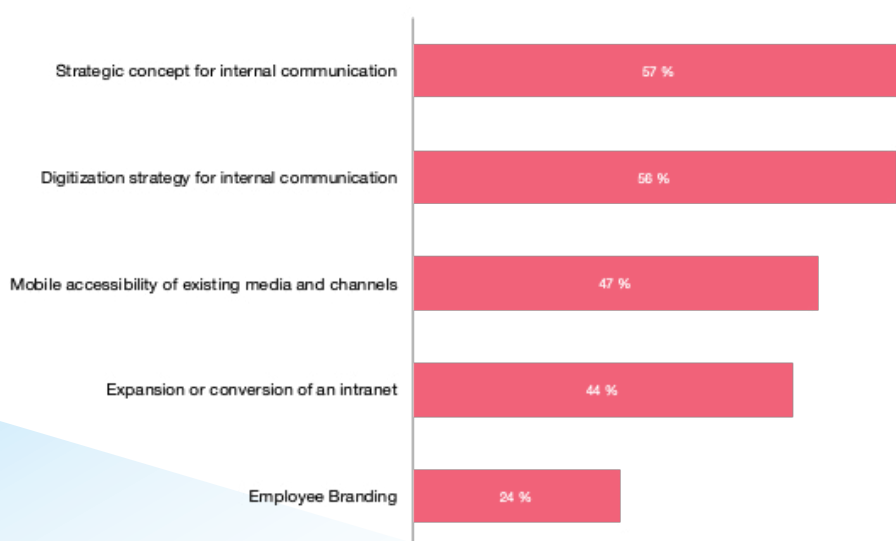


Figure 12: Which Projects Would You Prioritize for Future Crisis Comms?

n = 333 internal communicators worldwide. Q13: These five topics are on the agenda of many internal communicators. Which projects would you prioritize for future crisis comms? (Multiple answers possible).

5.12 Employee apps are gaining momentum.

Roughly a quarter of the internal communicators we interviewed (26%) already use a professional employee app and were asked which functionalities they found particularly helpful during the crisis. They reported that the most helpful function was the ability for employees to give and receive direct feedback (Fig. 13), with the speed at which they can be reached coming in second.

Biggest Advantages of an Employee App During the Crisis

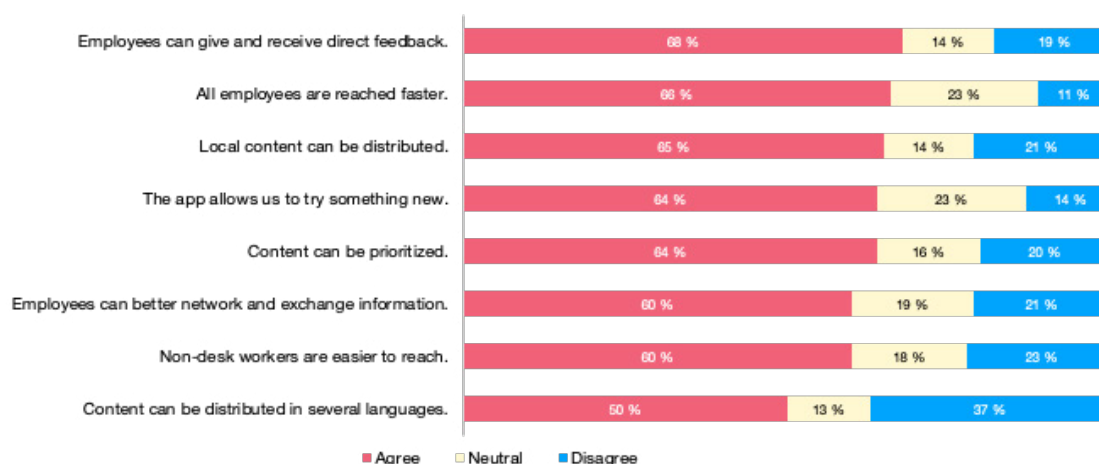


Figure 13: Biggest Advantages of an Employee App During the Crisis

n = 80 internal communicators worldwide. Q10: Which functionality do you find particularly useful during the COVID-19 crisis?

Scale 1 (not applicable at all) – 5 fully applicable). Agree: Scale figures 4 and 5; Neutral: Scale figure 3; Disagree: Scale figures 1 and 2.

A comparison of answers to the same questions from the benchmark survey conducted by the University of Leipzig before the crisis shows that the most helpful functions have changed, as respondents from this survey reported distribution of content in multiple languages (38%) and ease of content prioritization (30%) as most useful.

It can be concluded that times of crisis demand increased feedback and agility from internal communicators. These specific qualities can be gained through the use of employee apps, and in this context they amount to far more than what may once have been thought to be mere conveniences of the platform. This conclusion amplifies previous trends, in that a majority of today's internal communicators recognize the need for increased digitization, regardless of the platform they use to attain it.

Although details of the “new normal” are still to be seen, necessities are emerging that will define workplace communication after the coronavirus crisis: namely, more transparent information policies and new options for effective remote working. It is now clear that companies must quickly and uncompromisingly concentrate on taking the necessary steps for better employee communication. And they should continue seeking ways to utilize the long-term lessons of the crisis as a means for improving their efforts.

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**The ultimate guide
to communications
post Covid-19**

