INSTITUTE OF INTERNAL COMMUNICATION

JULY 2026

Impact Brief.

The trends shaping organisations and internal communication.

Executive summary.

Internal communication's trust test.

Welcome to July's Impact Brief, the IOIC's monthly intelligence report tracking the key shifts and undercurrents shaping organisations and the people within them.

This month's edition lands at an inflection point. A new Labour leadership, a stagflation-lite economy and AI agents that no longer wait to be asked are all converging on the same question: who do colleagues believe, and why? Trust, it turns out, isn't inherited. It's rebuilt, conversation by conversation.

That puts internal communicators in a prominent, business-critical position. Boards are anxious, managers are stretched thin and the gap between what leadership knows and what colleagues understand is widening across almost every chapter in this report. Closing those gaps isn't a nice-to-have. It's the job.

Drawing on emerging trends and forces from across the globe, this month's edition explores:

- why a change of UK PM won't reset a trust deficit that's been building for years
- the business case for straight economic talk, and why people fear uncertainty more than bad news
- what happens when AI stops suggesting and starts deciding, and who's accountable?
- the £100bn case for net zero that's under political attack, and the nature risk now heading to boardrooms
- why the four-day week keeps proving its merits, yet most organisations are still resisting it
- and why burnout is a structural failure, not a personality shortcoming, and the male disengagement crisis emerging unaddressed alongside it.

Business Signals.

Why silence costs more than honesty: the business case for straight economic talk.

The UK's economic outlook has a new descriptor – "stagflation-lite", due to slower growth, rising inflation and the prospect of recession later in the year, if Middle East energy disruption deepens or domestic political uncertainty compounds. KPMG puts UK GDP growth at just 0.7% for the year, down from 1.3% in 2025, with headline inflation expected to peak at 3.6% in September, well above the Bank of England's 2% target, with interest rates held at 3.75%.

"People hate uncertainty; so, solutions that reduce that uncertainty can create a lot of value."

RORY SUTHERLAND
BEHAVIOURAL SCIENTIST & AUTHOR OF ALCHEMY

Against that backdrop, PwC's 29th Global CEO Survey found that only 30% of CEOs are confident about revenue growth over the next 12 months, the lowest level in five years. Leaders, in other words, are anxious. The question IC professionals should ponder is whether that anxiety reaches colleagues – and in what form.

The behavioural scientist Rory Sutherland offers a useful framing here. His argument is that people do not fundamentally dislike bad news – they hate uncertainty more.

30%

of CEOs globally are confident about revenue growth over the next 12 months – the lowest level in five years.

Communicating the shape of a difficult situation helps alleviate the psychological distress of not knowing, even when the underlying picture has not improved.

Organisations that maintain a composed public narrative while employees experience something very different don't preserve trust – they destroy it.

Because the lived-experience gap is very real. Real GDP per person is still falling even as headline growth figures hold, creating a disconnect between the numbers leaders quote and what employees feel in their pay packets and job security.

58%

Trust in CEOs and senior leadership teams has dropped nine points in a single year.

49%

of employees say the reasons behind organisational change are clearly communicated.

For IC professionals, closing that gap isn't a reputational risk to be managed. It's a strategic lever.

Colleagues in organisations that perform below financial targets tend to have the lowest trust and advocacy scores of any group in our IC Index. Silence, in a stagflation-lite environment, isn't neutral. It's become a choice – with a cost associated with it.

When the PM changes, but the trust deficit doesn't.

For many colleagues, economic anxiety and political distrust don't travel separately. Only 9% of Britons trusted politicians to tell the truth in 2025 – one of the lowest figures on record. Nearly seven in ten people globally fear that institutional leaders are deliberately misleading the public.

That means many colleagues don't turn up to work as blank slates. They arrive primed for scepticism about authority, and a change of prime minister doesn’t automatically reset their cynicism.

Andy Burnham's all-but-certain ascent to the Labour leadership carries a genuine communications advantage over his predecessor. He starts his potential tenure with a more natural storytelling manner and a clearer sense of whom he’s up against – the Makerfield by-election, fought and won against Reform UK, gave him something Keir Starmer never convincingly had: a mini-mandate rooted in contest rather than inheritance. But there’s something else worth

70%

Nearly 7 in 10 people globally fear that institutional leaders are deliberately misleading the public.

noting here: comms failures tend to start with ill-designed policy. Authenticity flows from surety of purpose, and it's hard to sell something with sincere passion when you don't really know what it's for.

That take-away lands directly in IC territory. The IC Index shows trust in senior leadership is down nine points in a single year. Meanwhile, national government leaders have suffered a net trust loss of 16 points over the past five years – the steepest institutional decline ever in Edelman's global Edelman Trust Index. The UK scores just 44 on Edelman's latest Trust Barometer, placing it among the least trusted developed economies globally alongside France, Germany and Japan. So, Burnham inherits that deficit as much as he inherits the keys to Downing Street.

His net favourability of +7 – rare for any UK political figure right now – might demonstrate that character moves people. But character without a clear underlying purpose, at political or organisational level, can erode faster than it builds.

For IC professionals, the lesson is the same whether the communicator is a new PM or a newly appointed CEO: narrative proficiency is a multiplier, not a substitute. It amplifies clarity. But it can't manufacture it.

IC challenges.

- Colleagues dislike uncertainty more than bad news
- UK stagflation is making boards anxious and affecting medium-term confidence
- Calm leadership messaging on future prospects at odds with what colleagues feel
- Trust deficit outside work feeds colleagues' scepticism about work authority

Strategic responses.

- Are we encouraging solutions that reduce uncertainty and create value?
- How is economic anxiety reaching colleagues? In what form?
- What would naming the economic picture honestly look like, in plain terms, this week?
- Does leadership need to show greater clarity of purpose/narrative proficiency to build trust?

AI & Tech.

When AI stops suggesting and starts deciding.

40%

of enterprise applications will include task-specific AI agents by end of 2026 – up from under 5% in 2025.

15%

of day-to-day workplace decisions will be made autonomously by AI agents by 2028.

AI has moved on. Where once it offered a shortcut or a draft, it now takes decisions, initiates actions and operates workflows – without waiting to be asked.

This is the shift from AI as assistant to AI as autonomous agent, and it's happening faster than most organisations have prepared for.

Gartner predicts that 40% of enterprise applications will include task-specific AI agents by the end of 2026, up from less than 5% in 2025 – that's an eightfold increase in a single year.

By 2028, at least 15% of day-to-day work decisions will be made autonomously through agentic AI.

Microsoft's 2026 Work Trend Index frames the central challenge emerging as one of human agency – where we're not replaced by agents, but redefined by them. As AI and agents take on execution, human agency actually expands.

But are our organisations equipped to accommodate this?

For internal communicators, this creates a governance gap that goes beyond technology. 2026 data in our IC Index makes the stakes clear: only 36% of employees agree their leaders have explained how AI will be used.

As AI and agents take on execution, our own agency expands. The question is whether organisations are built to capture it.

MICROSOFT WORK TREND INDEX 2026

So, there are clearly risks when leaders engage with AI superficially – rolling out prompt training without grappling with the wider strategic questions.

That gap is especially pronounced in UK-only organisations, which the IC Index finds are 14–15 points less positive across all AI-related measures than their international counterparts.

Domestic mid-market employers appear furthest behind on both adoption and communication – and agentic AI is set to only widen that distance.

The conversation has moved from "how do we use AI?" to "who is responsible when AI decides?" And as IC professionals, we need to position ourselves at the centre of that question.

The training deficit: what colleagues don't know about AI is costing organisations dearly.

Europe's next labour crunch will not be a shortage of colleagues. It will be due to a dearth of them who know how to work with AI effectively. Research across major European economies shows a consistent surge in AI skill demand that training pipelines have failed to match, with firms reporting growing difficulty recruiting qualified candidates.

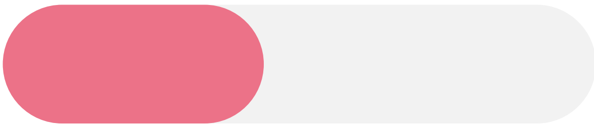
The skills gap, however, is not just an external hiring problem. It's also an internal communication issue.

Take a look at the seniority divide. Some 67% of senior leaders feel AI has been clearly explained to them, against only 23% of non-managers – a 44-point perception gap between the boardroom and everyone else. That's not an AI problem. That's a communication shortcoming.

The divide between domestic and global organisations compounds this. As we touched on above, colleagues in UK-only organis-ations already score consistently

lower than those in international businesses across every AI-related question – suggesting domestically focused employers are probably communicating less, explaining less clearly and generally building less confidence in how AI is to be applied.

44%



Perception gap between senior leaders who feel AI has been clearly explained to them (67%), versus non-managers (23%).

And the regulatory environment is about to sharpen that pressure considerably. The EU AI Act reaches full applicability next month, introducing a regulatory dimension that most organisations have not yet communicated internally. UK businesses with any EU footprint are in its scope. Purely domestic organisations with no EU customers or outputs are largely outside it for now – but the UK's own regulatory picture is also evolving at pace.

The gap between what leaders know and what colleagues understand is no longer just a cultural risk – it's fast becoming a compliance one.

IC challenges.

- AI increasingly making decisions; shifting from assistant to autonomous agent
- As agentic AI takes on more execution, human agency is redefined and expands
- 44-point gap between leaders' and colleagues' AI understanding
- UK-only firms are lagging international peers on AI clarity

Strategic responses.

- Is it clear who's accountable when an agent decides?
- Is our organisation equipped to accommodate AI autonomy?
- Could we run a leadership vs. non-manager AI understanding check-in this month?
- Are we explaining AI governance in tandem, or only training people to use tools?

Sustainability.

The £100bn argument net-zero refusniks don't want any of us to have.

> The UK cannot afford to step back from an industry already contributing £100bn to the economy and with huge future growth potential.

LOUISE HELLEM
CBI CHIEF ECONOMIST

The UK's net zero economy now employs 1.1 million people and contributes £105 billion in gross value added. Green economy colleagues contribute nearly £120,000 annually to the wider economy – around one-and-a-half times the UK average productivity level. They also earn 11% above the national average wage, and another estimated £455 billion of investment is in the pipeline.

The timing of this data matters. It arrives at precisely the moment that Reform UK, the Conservative Party and, perhaps surprisingly, Tony Blair are calling for net zero targets to be scrapped and a return to full-blooded fossil fuel development. The CBI's chief economist, Louise Hellem, is unambiguous on why this is wrong: "At a time when the UK must strengthen energy security and drive growth, the net zero economy is becoming central to the country's future competitiveness."

The net zero refusnik position isn't a credible economic argument dressed up as common sense. After all, every climate sceptic has just experienced the same Europe-wide heatwave – the worst on record – as the rest of us. Climate scientists are unequivocal that this was a direct result of the climate emergency.

Instead, it's an elective 'head-in-the-sand' position designed to protect incumbent fossil fuel interests at the cost of a fast-growing, high-wage, domestically rooted industry.

In a country that's struggled with productivity for two decades, abandoning that isn't pragmatism. It'd mean more self-harm for the anaemic post-Brexit economy.

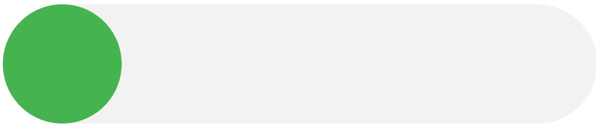
For IC professionals, this is a story with direct colleague relevance. Over a million colleagues work in this sector. 84% of global GDP is now covered by net zero commitments. And the global race is certainly not hanging around, waiting for the UK to resolve its internal political arguments.

84%

of global GDP is covered by net zero commitments – so, the global race isn't contingent on UK political consensus.

Nature risk: the supply chain story heading for your boardroom.

12%



Percentage by which nature loss could reduce UK GDP by 2030 – over double the economic impact of 2008's financial crash.

66%

of colleagues globally have experienced at least one extreme weather event in the past six months.

May's Impact Brief introduced the concept of the nature-positive agenda. This month, the story moves upstream – into supply chains, where biodiversity risk is shifting from voluntary concern to regulatory reality.

A recent classified UK government intelligence report warned that nature loss could reduce annual GDP by 12% by 2030 – more than double the economic impact of the 2008 financial crash, and roughly equivalent to the entire annual NHS budget. While the government chose not to publish those figures, they're now in the public domain.

The strategic implications are sharpest in supply chains. Agriculture, food, pharmaceuticals and construction all draw on ecosystem services – water, soil, pollination, timber – that are degrading faster than most procurement teams have mapped. By Q1 2026, more than 730 companies representing $22 trillion (£16.6 trillion) in assets under management had committed to The Taskforce on Nature-related Financial Disclosures (TNFD) nature disclosures, with the UK government actively considering making these mandatory. The International Sustainability

Standards Board (ISSB) Exposure Draft on nature standards is expected in October 2026, and is likely to embed these requirements in global listing rules.

That regulatory direction has a communication corollary. Deloitte research highlights how 66% of colleagues across nearly 20 countries have experienced at least one extreme weather event in the last six months. Little wonder that climate anxiety in the workforce is noticeably on the up. Nature risk reporting makes the awareness gap identified in our May report a governance problem as much as a comms issue.

But the IC opportunity is not to catastrophise here, of course. We should connect the dots honestly: where are our supply chains exposed, and what are we doing about it?

730+

organisations representing $22 trillion in assets have committed to TNFD nature disclosures.

IC challenges.

- External noise on net zero's economic benefits risks unsettling internal arguments
- Colleagues feel climate anxiety that comms rarely acknowledges directly
- By 2030, nature loss could cost the UK twice the 2008 crash
- Nature risk in supply chains is becoming a board-level liability

Strategic responses.

- Are we making the economic case for green jobs as plainly as critics attack it?
- When did we last check in on how climate anxiety is showing up?
- Have we framed nature risk in terms and numbers colleagues recognise?
- Are colleagues aware where supply chain carries nature risk exposure – and of our response?

Employment.

The four-day week: a key momentum shift most organisations continue to ignore.

The evidence is pretty hard to brush aside. Of the 61 UK companies that participated in a recent landmark four-day week pilot, 92% continued it afterwards.

> People are happier, businesses are thriving – there's no turning back.

JOE RYLE
CAMPAIGN DIRECTOR, 4 DAY WEEK FOUNDATION

Sick days fell by 65%. Burnout dropped among 71% of employees. Revenue held – and even marginally increased. A subsequent pilot saw 100% retention. More than 2.7 million UK colleagues – over one in ten of the workforce – now report working a four-day week.

Yet most large organisations are are reticent to adopt it. The UK government supports flexible working, including compressed hours, but has confirmed no plans to mandate a four-day week – with any reform subject to consultation with businesses and unions. And the gap between the evidence base and organisational policy is where IC professionals increasing-ly find themselves operating.

Joe Ryle, Campaign Director of the 4 Day Week Foundation, puts it plainly: “People are happier, businesses are thriving, and there's no turning back. We've proved it again and again: a four-day week works and should now be implemented more widely across the economy."

Yet what colleagues experience, many organisations have been slow to follow – and that mismatch is shaping candidate expectations, culture conversations and, increasingly, talent retention.

There's also a structural faultline the IC Index surfaces here. Front-line, distribution and store workers – those least likely to benefit from flexible work models of any kind – already score significantly lower on trust, psychological safety and awareness of organisational change than their desk-based counterparts. On trust in the CEO, disconnected employees score 35% positive versus 54% for knowledge sector colleagues. 20% of them hear important news through word of mouth, compared to digitally-connected peers.

The practical realities are complex and nuanced, of course. But a four-day week debate framed purely around the knowledge sector risks leaving other audiences further behind. And as IC professionals, we're perfectly placed to ensure that it doesn't.

92%

of UK pilot companies have continued the four-day week after their recent trial; sick days fell 65% and 71% of employees reported lower burnout.

Employment.

Middle managers are absorbing the shocks. But what happens when nobody's absorbing theirs?

When broken organisational systems go unaddressed, middle managers often become the shock absorbers: fixing communication gaps, supporting struggling colleagues and carrying the pressure created by ineffective top-level decision-making. For a while, they hold. And then they don't.

Managers influence 70% of the variation in team engagement – yet their own engagement is falling. The average middle manager now has 12.1 direct reports, a 50% increase since 2013, and spends less than half their time actually managing people. The rest goes on administration, upward reporting and firefighting.

Our 2026 IC Index makes the structural failure visible. Managers' sense of feeling equipped to lead

business conversations has fallen four points year-on-year, and is now at 76%. More than half spend 30 minutes or less per day communicating with their teams. The two most impactful forms of support are dedicated communication time and formal training – yet only 27% and 20% of managers receive these. The most common support is ad hoc email briefings, which correlates with the lowest effectiveness scores.

Christine Tao, CEO of Silicon Valley coaching firm Sounding Board, identifies the dangers in that approach: “The most common response to manager burnout is to 'lighten the load.' But that does not address the structural issue. You can remove a few books from the shelf. But if the structure was never designed to hold the weight, it still bends under the pressure."

As IC professionals, we can strive to help address this challenge: not with another email briefing, but by encouraging infrastructure conversations that genuinely lead to change in what managers do.

IC challenges.

- A four-day week has proven benefits; yet most organisations reject the concept
- Many frontline colleagues are excluded from flexible work conversations entirely
- Middle managers are absorbing organisational strain, often with inadequate support
- Many managers get no dedicated time or training to communicate

Strategic responses.

- Could we open an honest four-day week conversation, not just dismiss it?
- How is our flexible work messaging landing with frontline colleagues?
- Where do we need to close gaps and encourage more infrastructure conversations?
- What would more formal training and ring-fenced communication time actually buy our managers?

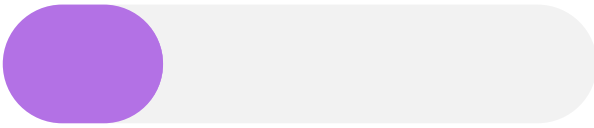
People.

Burnout is increasingly seen as a system failure, rather than a personality flaw.

91%

of UK adults experienced high or extreme stress in the past year – unchanged for three consecutive years.

27%



of colleagues who took stress-related time off received no support on returning; only 17% had formal return-to-work plans.

Nine in ten UK adults have experienced high or extreme pressure or stress in the past year – a worryingly stubborn figure that has refused to budge for three years. Awareness campaigns have failed to move the dial. One in five colleagues have taken time off due to poor mental health caused by stress, rising to two in five among 18–24-year-olds. And often the reason for that, experts increasingly believe, is structural, as opposed to personal.

That's because burnout rarely stems from individual weakness. It emerges when demands exceed capacity, recovery time is limited and support systems are insufficient. Charlotte Maxwell-Davies, Head of Workplace Mental Health at Mental Health UK, identifies what is driving this among younger cohorts: "Many young workers feel they must remain constantly visible, working long hours and staying perpetually connected."

2026 IC Index data on psychological safety paints an uncomfortable picture. Only 59% of colleagues feel motivated to do their best work – that's down six points in one year.

> Many young workers feel they must remain constantly visible, working long hours and staying perpetually connected.

CHARLOTTE MAXWELL-DAVIES

HEAD OF WORKPLACE MENTAL HEALTH, MENTAL HEALTH UK

Just 49% agree people can share opinions without fear of negative consequence. Over five years, there's been a 25% decline in colleagues who feel able to bring their whole self to work, despite more than eight in ten saying this matters to them.

In addition, almost one in three says their employer raises awareness about mental health but that managers lack the time, training and resources to provide any meaningful support.

And there's the nub of it, perhaps. Because awareness without infrastructure is performative. Psychological safety without structural permission is merely aspiration.

As we said above, IC professionals will need to capitalise on their neutral position to help build environments where managers are properly equipped to support others.

But while we're at it, let's think about how silence is interpreted when it fills the vacuum where radical honesty should be.

Present in body, absent in spirit: the men's participation crisis is a workplace conversation we need to have

May's Impact Brief tracked the feminisation of the workforce. This month, we look at the flip side: the emergent quieter, less discussed crisis among men – and its implications for organisational belonging and engagement.

Men are nearly four times more likely to die by suicide than women, yet only 40% of men with mental illness receive treatment, compared to 52% of women. Younger men are less likely to be working than their fathers were at the same age. Disengagement from education, civic life and career ambition is on the rise – and walking through your organisation's door every morning.

The data on loneliness is sobering. One in four US men aged 15-34 reports feeling lonely on any given day – significantly higher than the national average of 18% and higher than young women. That's also higher than their peers in every comparable wealthy nation.

Vibhas Ratanjee, Senior Practice Expert at Gallup, coined the phrase the "With Me Generation" for this paradox: the most digitally connected generation in history is

also the loneliest. And that loneliness is linked to lower life satisfaction, reduced social trust and lower perceived autonomy.

This isn’t a conversation that pits men's needs against women's progress. It’s about creating workplaces where vulnerability is structurally possible – where men have pathways to connection, not just performance. Belonging isn't built merely by lobbing the word in to a values statement. It requires deliberate communication infra-structure, visible leadership modelling and the willingness to acknowledge what’s going on.

Because increasingly, those organisations that ignore the warning signs will no longer be considered neutral bystanders.

40%

of men with mental illness get treatment (vs 52% of women).

IC challenges.

- Men’s rising disengagement/ loneliness overlooked at work
- Awareness campaigns on mental health haven't alleviated stress
- Burnout is structural, yet mainly viewed/treated as an individual resilience problem
- Psychological safety has fallen even as colleagues say it matters most to them

Strategic responses.

- Where could disengaged men in our organisations find a genuine, low-pressure way to connect?
- Are we offering enough meaning-ful support around stress?
- Which workload or staffing decision might have contributed to the rise in colleague burnout?
- When did a colleague last safely disagree with leadership?

Take-aways and actionable recommendations.

A change of leader doesn't reset a trust deficit. Colleagues hate uncertainty more than bad news and silence is costly. Acknowledging the economic picture honestly helps close awareness gaps.

AI is shifting from suggesting to deciding, yet accountability hasn't caught up. A 44-point gap separates what leaders and colleagues understand about AI. Governance is increasingly an IC responsibility.

Net zero's £100 billion case is under political attack; supply chain nature risk is now a boardroom liability; and climate anxiety is on the rise. IC should address these issues in terms people relate to.

The four-day week works, yet most organisations reject the idea. Middle managers are absorbing the strain with inadequate support. Closing the gaps requires meaningful infrastructure conversations.

Burnout is structural, not a personality flaw; the sense of psychological safety is falling; men's disengagement is largely unaddressed against that backdrop. IC neutrality is central to tackling these issues.

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About Working the Future.

Established in 2016, Working the Future is a boutique consulting and advisory firm helping businesses adapt to the future of work.

It provides executive education to help business leaders, managers and decision-makers develop their understanding of the rapidly changing world of work, allowing them to prepare and mitigate risk accordingly.

It co-designs progressive strategies to optimise team-performance and organisational agility. Its people-centred approach enhances collective intelligence for improved resilience and long-term organisational sustainability.

About the founders
Cathryn Barnard has a long background in building and nurturing high-performing teams. Her interest in human dynamics has transferred across into her expert analysis of the future of work, and her insights help business leaders future-proof their commercial activities.

Patrick Lodge is a futurist and emerging trends expert, with 20 years' experience in horizon-scanning. He has a particular interest in generating and demystifying business intelligence applicable to all forms of upstream future-planning activity.

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