



The Worldcom Confidence Index 2019

Global Report



WORLDCOM
Public Relations Group

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Artificial Intelligence provides unrivalled view of trending topics and leaders' confidence and concern in addressing them



In 2018, with the help of two respected independent research firms, we captured feedback from 540 business leaders in seven of the world's largest economies and across three regions – Asia, Europe and America. Their responses created the first [Worldcom Confidence Index](#) – an invaluable benchmark for the confidence levels of business leaders.

However, it was based on responses to questions we asked rather than on the topics that CEOs and CMOs were talking about in online channels. The feedback we received about our first **Confidence Index** showed that there was a real appetite for us to:

- Further identify where different topics feature in leaders' priorities
- Extend the insight delivered to cover more regions and countries
- Assign a Confidence and Concern ranking to each of the topics.

Therefore, in this year's report, we adopted a new and breakthrough way of understanding the issues that concern leaders – and their confidence levels in addressing them.

We commissioned [Advanced Symbolics Inc.](#) (ASI), a research company that uses artificial intelligence (AI) to create a fully representative understanding of what audiences are saying.

By using ASI's AI tool, and patented methodology, we have produced a truly global perspective on the business issues of the moment and where they rank in terms of leadership attention. We've also calculated the confidence levels for every topic and audience and identified how these change around the world. This is incredibly valuable insight because it not only represents what leaders are talking about, rather than responses to questions, but also shows their confidence or concern in addressing each topic. It means you can compare your own thoughts with more than 58,000 of your global peers.

In our second annual **Confidence Index**, we captured and analysed the online contributions, in nine languages, of **58,374** business leaders. This enabled us to identify which topics are highest on the leadership agenda, and how confident or concerned leaders are about the topic. The results of this study are presented in 23 reports: a global report, seven regional reports – Africa, Asia, Australasia, Europe, North America, South America and Latin America & Caribbean and 15 country-specific reports - Australia, Brazil, Canada, China, France, Germany, India, Italy, Japan, Mexico, Portugal, Russia, South Africa, UK and United States.

How are leaders responding to an increasingly uncertain world?

Our first **Confidence Index** identified 2018 as the 'Year of the Employee' and signalled that organisations of all sizes were engaged in a battle for talent. It also uncovered that issues that may once have been considered peripheral, such as extreme weather events, like Hurricane Dorian and Typhoon Hagibis, were beginning to reach the leadership agenda.

Since we published our first **Confidence Index**, world events such as: the US/China trade war, Brexit, Amazon forest fires, the Hong Kong crisis, the increasing pace of global warming and the resurgence of diseases such as Measles, have continued to create a more uncertain world. Our second **Confidence Index** shows exactly how confident or concerned business leaders are about dealing with these challenges.

Our top five findings are summarised in the chart opposite. We encourage you to review the results globally, regionally and locally to inform your plans and guide your actions for 2020. Our recommendations for communications action - in [Section Four](#) - are a direct consequence of what our study uncovered. They will enable you to focus your communications effort where it will deliver the most value. We hope you find them helpful.

This is incredibly valuable insight because it not only represents what leaders are talking about, rather than responses to questions, but also shows their confidence or concern in addressing each topic. It means you can compare your own thoughts with over 58,000 of your global peers.

Worldcom Confidence Index 2019

Top five findings

- #1 Confidence levels implode – down 21 per cent**
 - The United States is the biggest faller (down 51 per cent) and Japan the biggest riser
- #2 Influencers become #1 audience for leader attention but have second lowest CI score**
 - The impact and role of the media has the lowest CI score
- #3 Employee related topics dominate leaders' agenda**
 - Upskilling and reskilling the most discussed topic
 - Employee related topics take five out of the top six topic places
 - CI score for employees lowest of all audiences
- #4 Leaders have concerns about their corporate image and brand reputation and their ability to protect it in a crisis**
- #5 Global trade agreements and tariffs undermine confidence**



Roger Hurni, Chairman, The Worldcom Public Relations Group

PART 1

The 2019 Confidence 10

-51%

The Confidence Index (CI) score for United States has plummeted since 2018

+160%

Influencers grow their share of attention and leap to first place in 2019

5 out of 6

Five of the six top issues discussed by leaders are employee-related



Topic engagement and confidence

In the 2019 report we have identified the topics with the highest levels of engagement across the 58,374 leaders. There are 23.

Chart 1 shows which topics were discussed most by the leaders (level of engagement). The most frequently discussed topic was upskilling and reskilling with 15.23 per cent of the online engagement.

Each of these topics has a Confidence Index (CI) score which identifies the average level of confidence or concern in that topic across the entire sample of topics and demographics (see Chart #2).

CHART 1

Leaders' engagement level for topics

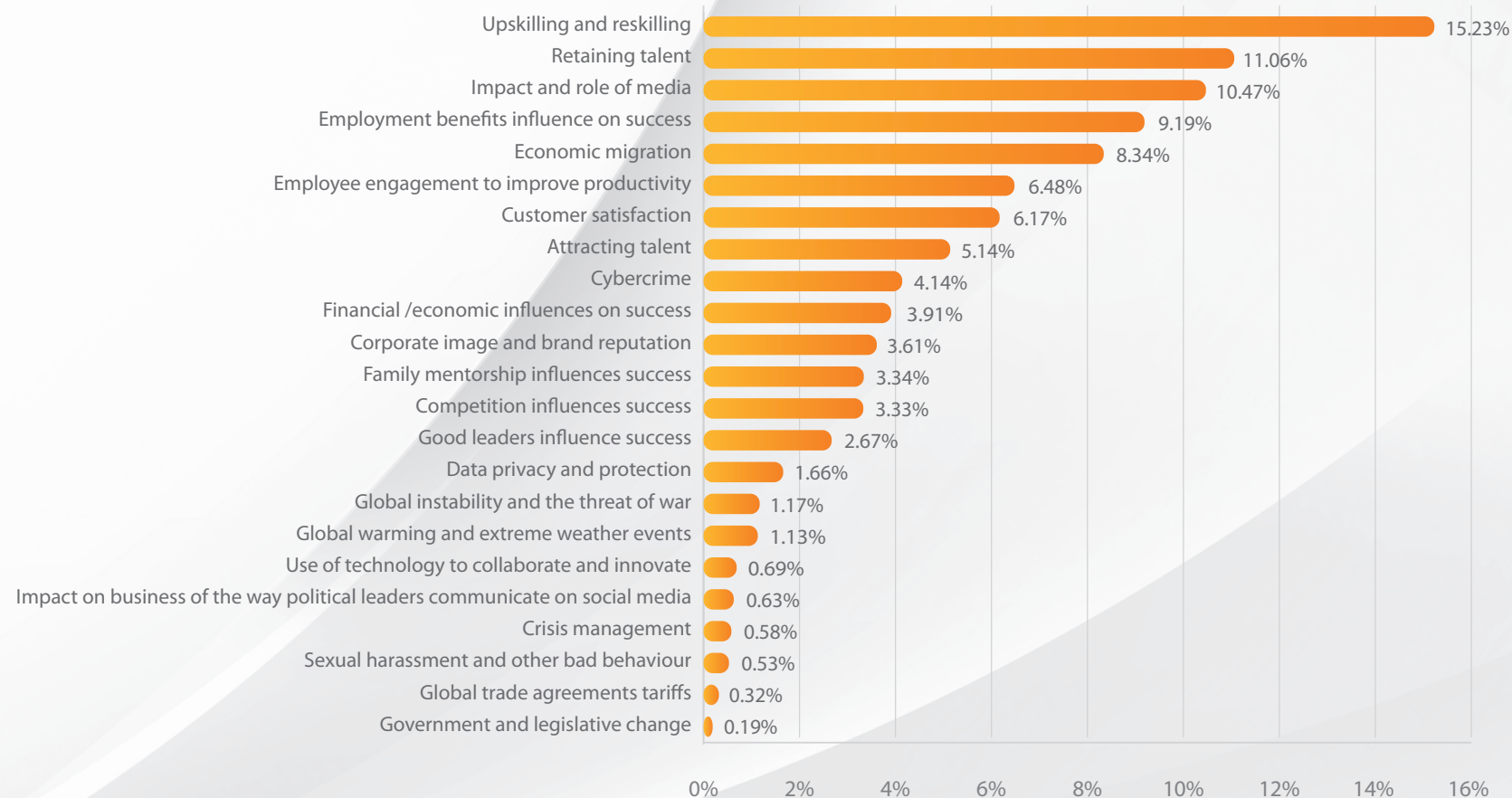
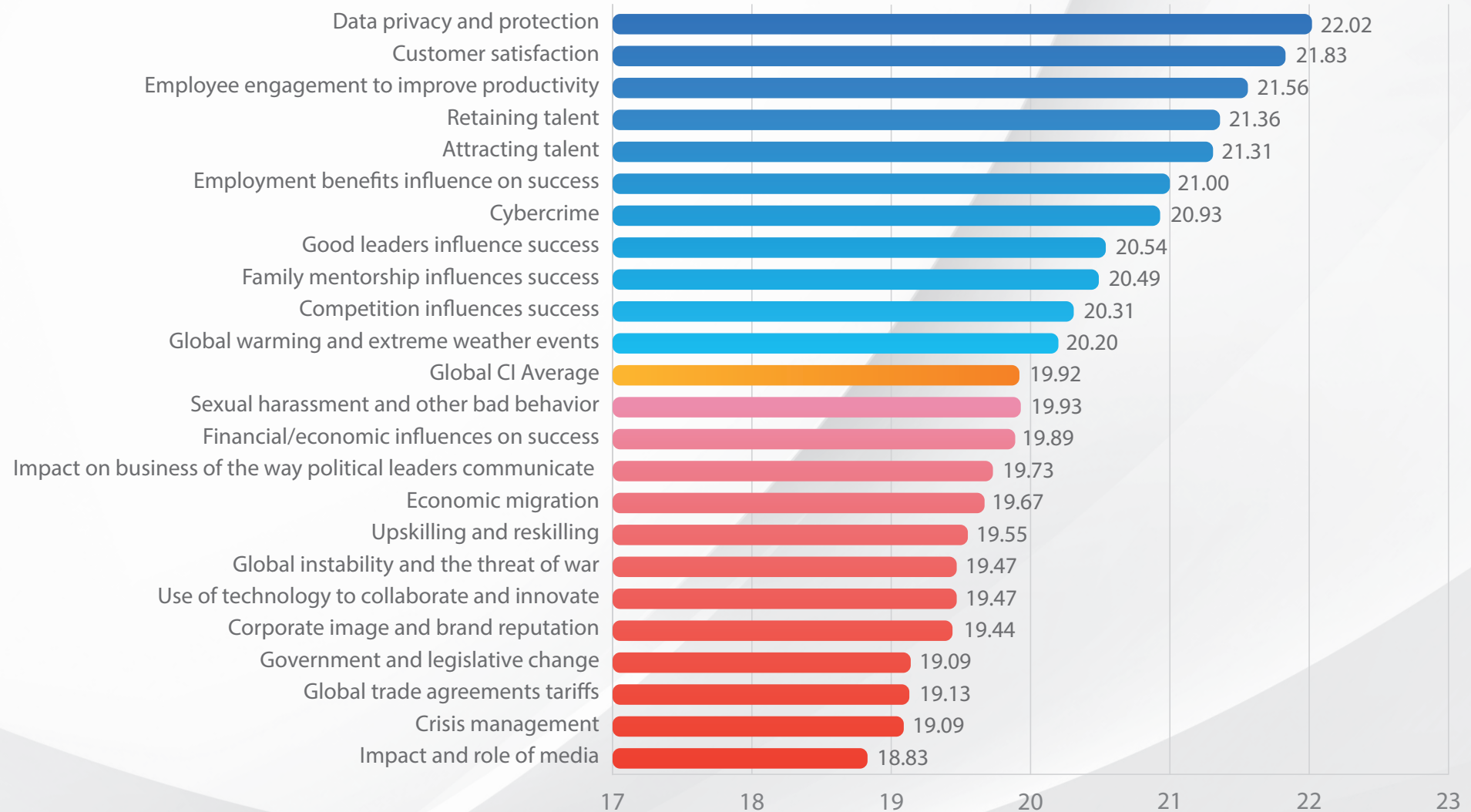


Chart 2 ranks these topics by the level of confidence the leaders have in the topic. The scores below the Global CI average indicate levels of concern.

CHART 2

2019 Worldcom Confidence Index by topics



Audience engagement and confidence

In addition to the 23 topics, we have identified the six audiences demanding the most attention from leaders. For each audience we have identified the level of leader engagement and provided a CI score.

Chart 3 ranks the audiences, with influencers getting the most attention and suppliers the least.

CHART 3

Leaders' engagement level for audiences

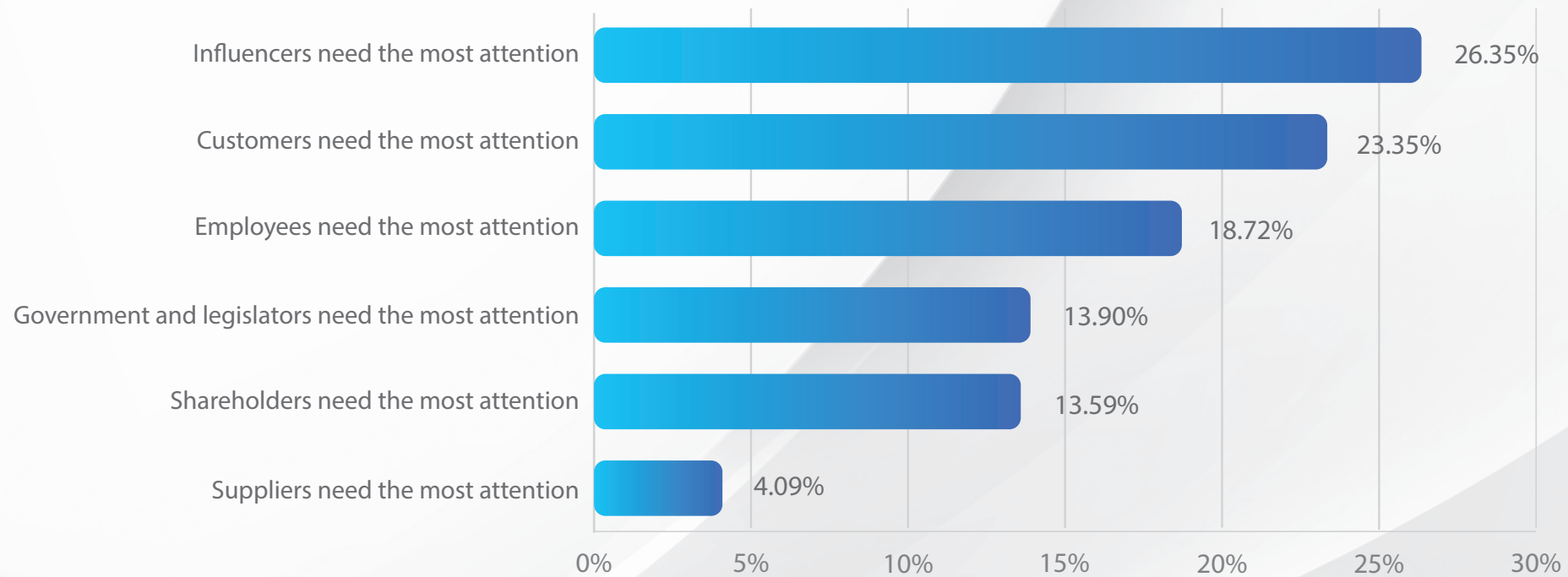
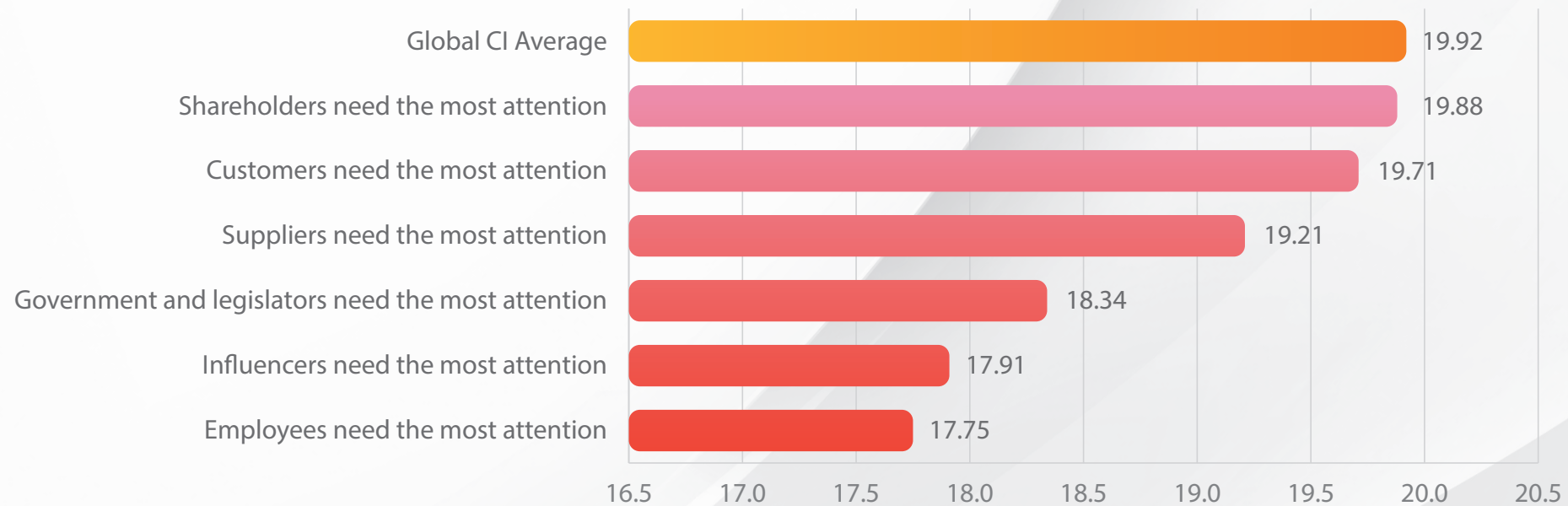


Chart 4 ranks these audiences by the level of confidence the leaders have in the handling the audience. The scores below the global CI average indicate levels of concern. All the audiences have a below average CI score and leaders are least confident/most concerned about employees.

CHART 4

2019 Worldcom Confidence Index by audiences



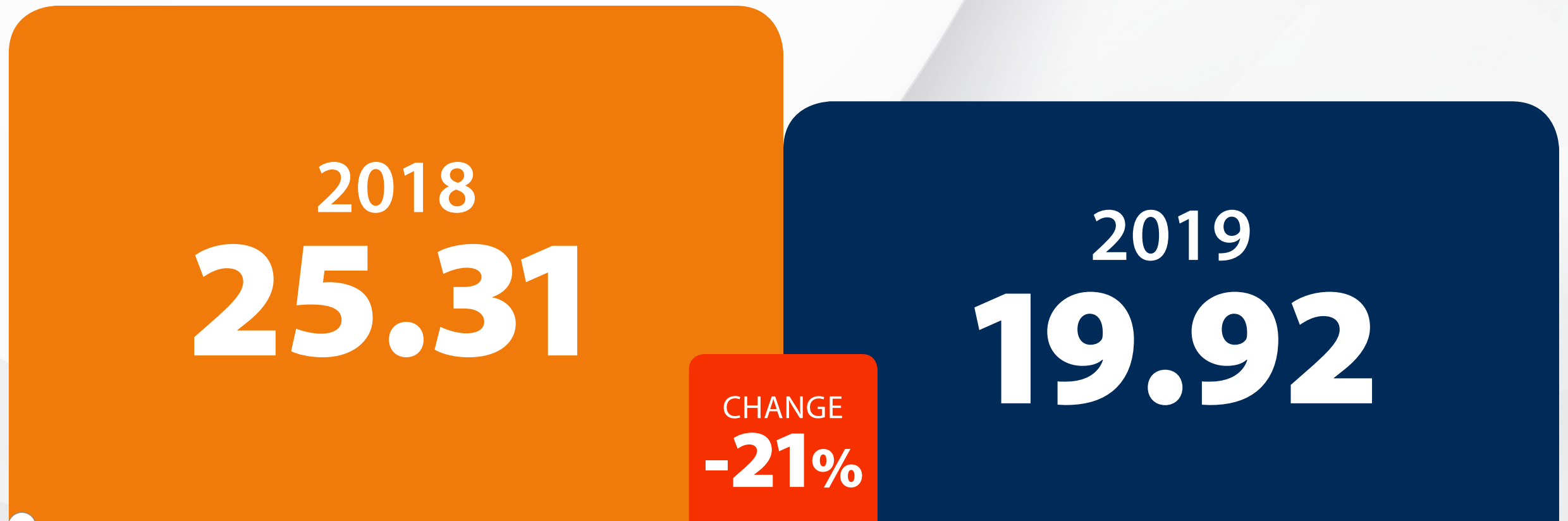
1. Confidence levels implode – down 21 per cent

The levels of uncertainty globally, highlighted in the Introduction, have had a profound impact on the confidence of business leaders.

The Global average **Confidence Index** (CI) score (which ranks confidence across 15 demographic categories, six audiences and 23 topics) has plummeted by 21 per cent from 25.31 in 2018 to just 19.92 in 2019. In fact, all the global CI scores for topics in 2019 are below the average score of 2018.

CHART 5

Global Confidence Index Score

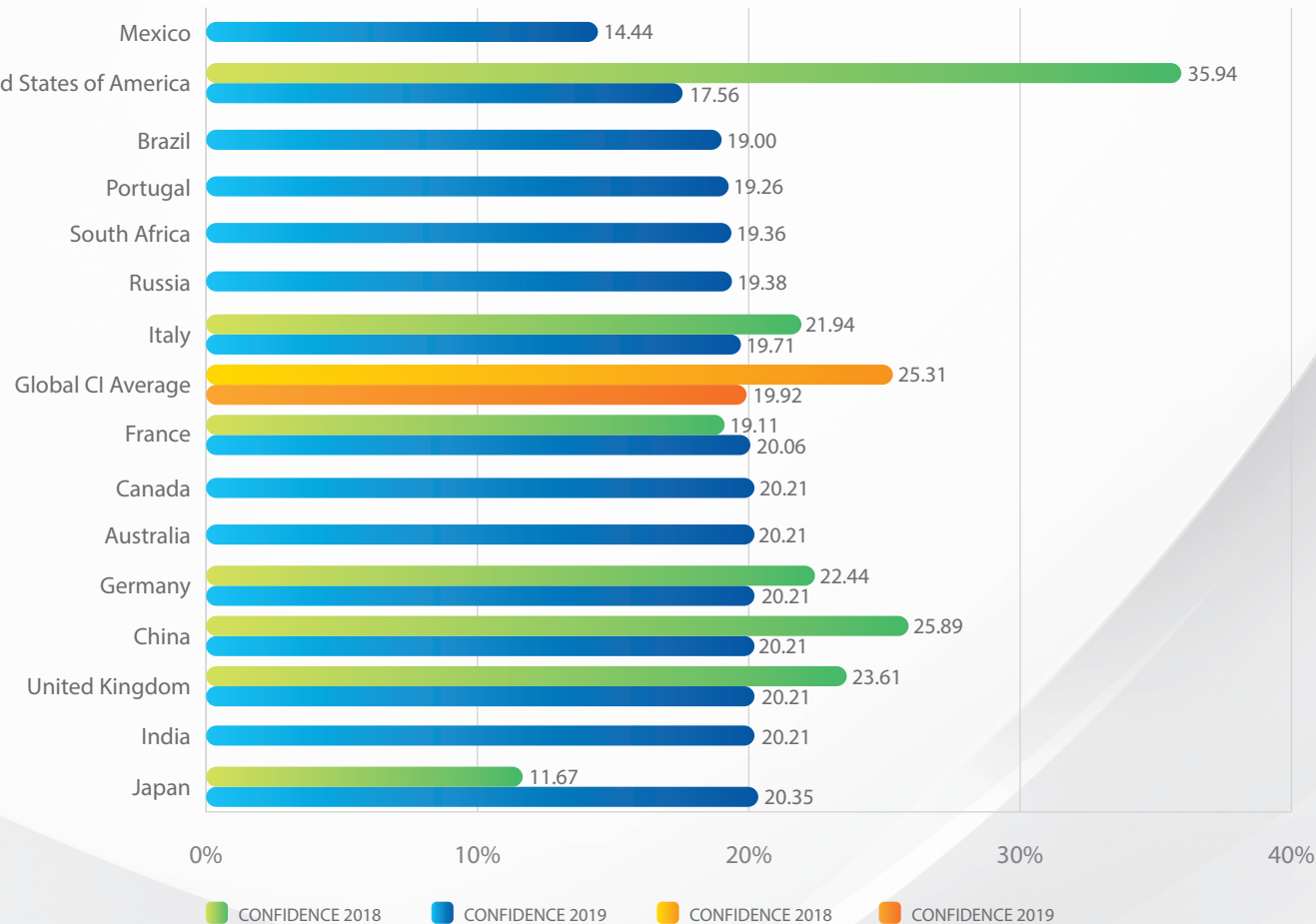


The United States posts the largest drop (down 51 per cent) and Japan the largest rise (up 74 per cent)

Five of the seven countries that had CI scores in 2018 have seen a reduction in confidence. The United States saw the biggest fall in confidence – down 51 per cent to 17.56.

CHART 6

Confidence Index by Country



China was the next biggest faller – down 21 per cent – but now has a higher CI score than the United States, of 20.21. Perhaps the confidence of US leaders has been impacted more by the US-China trade war?

This year's winner is Japan, which has not only seen the biggest increase in confidence but has jumped from last to first in the Index – up a massive 74 per cent to 20.35. Seven of the 15 countries are below the Global CI average score. The lowest is Mexico (14.44). France was the only other country to improve - up five per cent to 20.06.

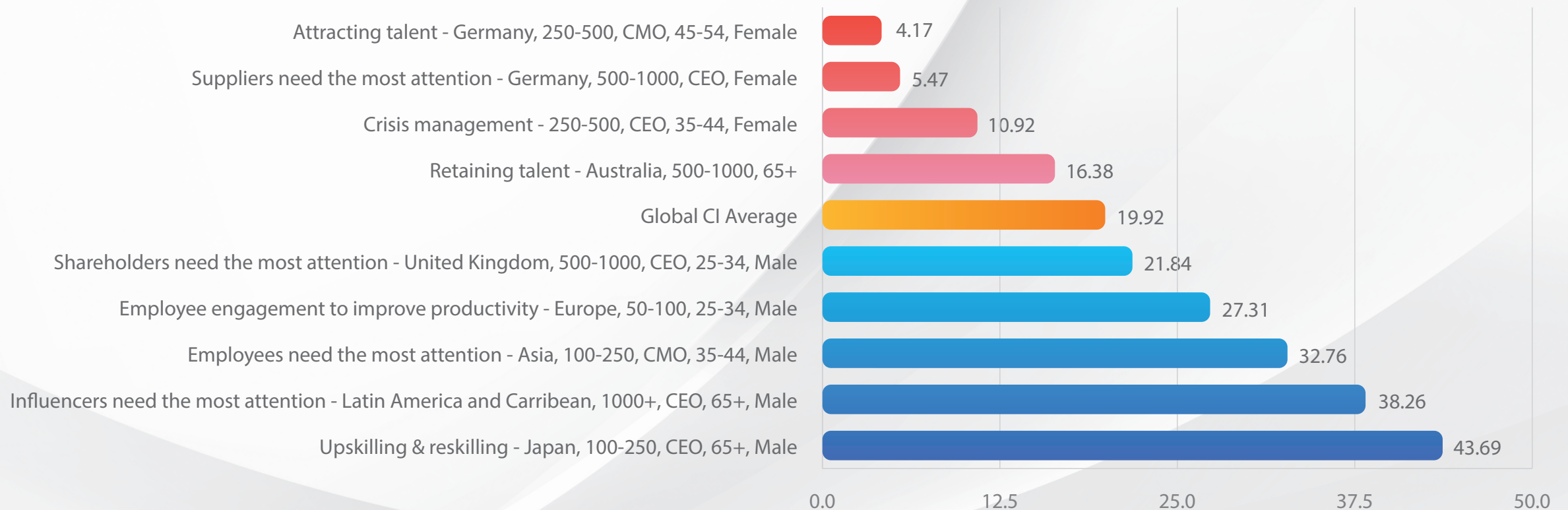
While the range in average confidence is relatively narrow, audience-specific confidence can differ widely

The average CI scores mask a huge range in confidence and concern across business topics and demographics. This year the **Confidence Index** scores range from 4.17 to 43.69.

For example, CMOs of medium sized organisations aged between 45 and 54 in Germany, have a CI score of 4.17 for their confidence in their ability to attract talent. Japanese male CEOs of small organisations, who are aged over 65, have a CI score of 43.69 for the ability to upskill and reskill. It is worth looking at these local differences – particularly if you run a multinational or global organisation.

CHART 7

A selection of CI scores showing the global range



2. Influencers become top audience for leader attention but have second lowest CI score

Just as in 2018, this year, we identified audiences that leaders are giving most attention to. Influencers, an audience in decline last year, leapt to first place in 2019 – growing its share of attention by a massive 160 per cent. Customers slipped to #2 and saw their share decline by 44 per cent. Employees dropped to #3 with their share declining by 5 per cent year over year.

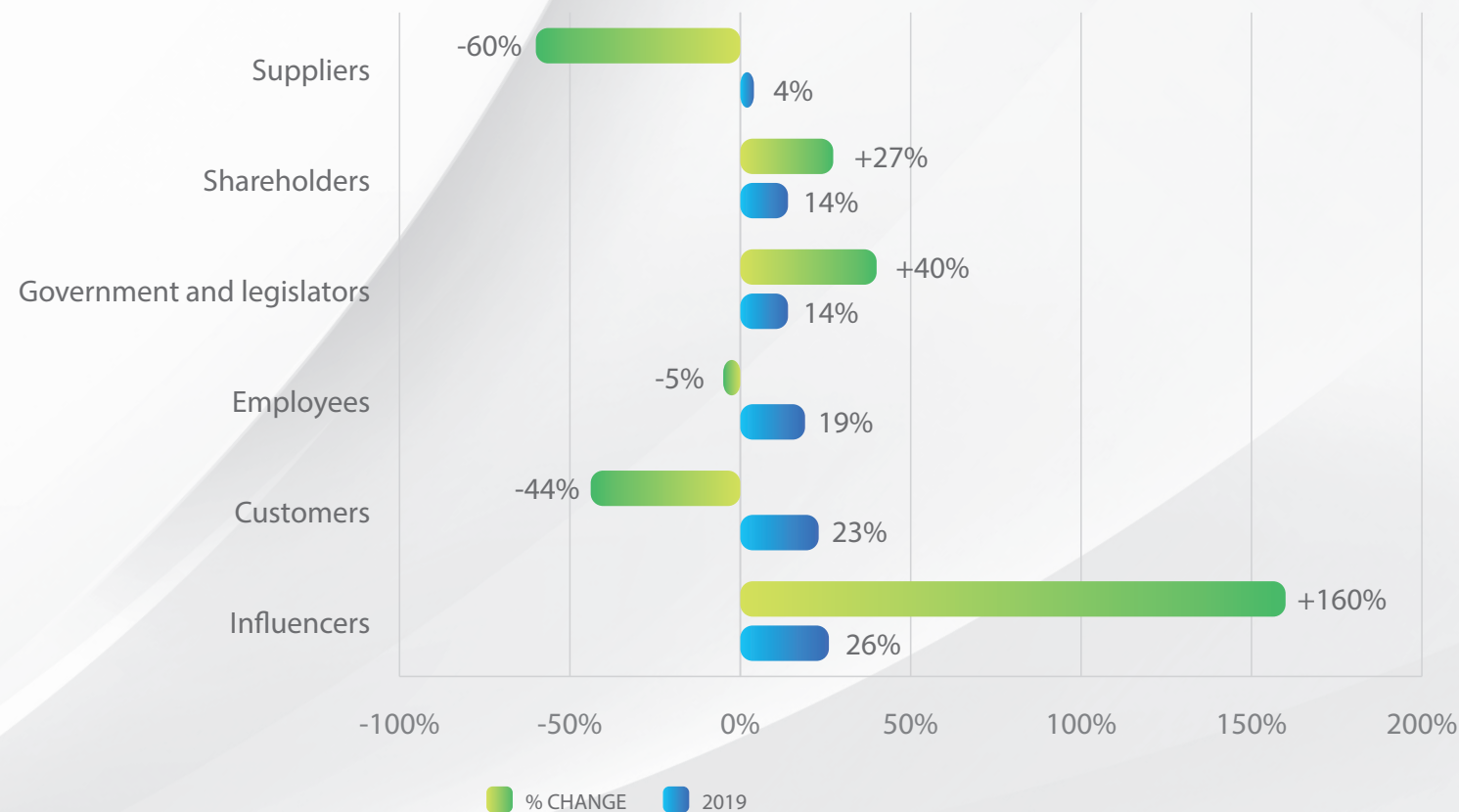
Although **Influencers are getting the most attention**, they have the second lowest audience CI score at 17.91 (see Chart #4), demonstrating leaders are very concerned about this audience. This may be a consequence of a feeling that leaders will need the support of influencers to help them steer their way through challenging and uncertain times. It may also reflect the fact that this key audience was receiving low levels of attention in 2018.

There is a big range in confidence across countries and regions. **Italian leaders, for example, have the lowest confidence about their ability to connect with influencers with a CI score of zero.** Conversely, African leaders have very high CI of 36.04.

Leaders aged between 35 and 44 are the most confident about dealing with influencers (23.6) and the next age group, 45-54 the least confident with a CI score 40 per cent lower (14.2).

CHART 8

Changes in attention to audiences



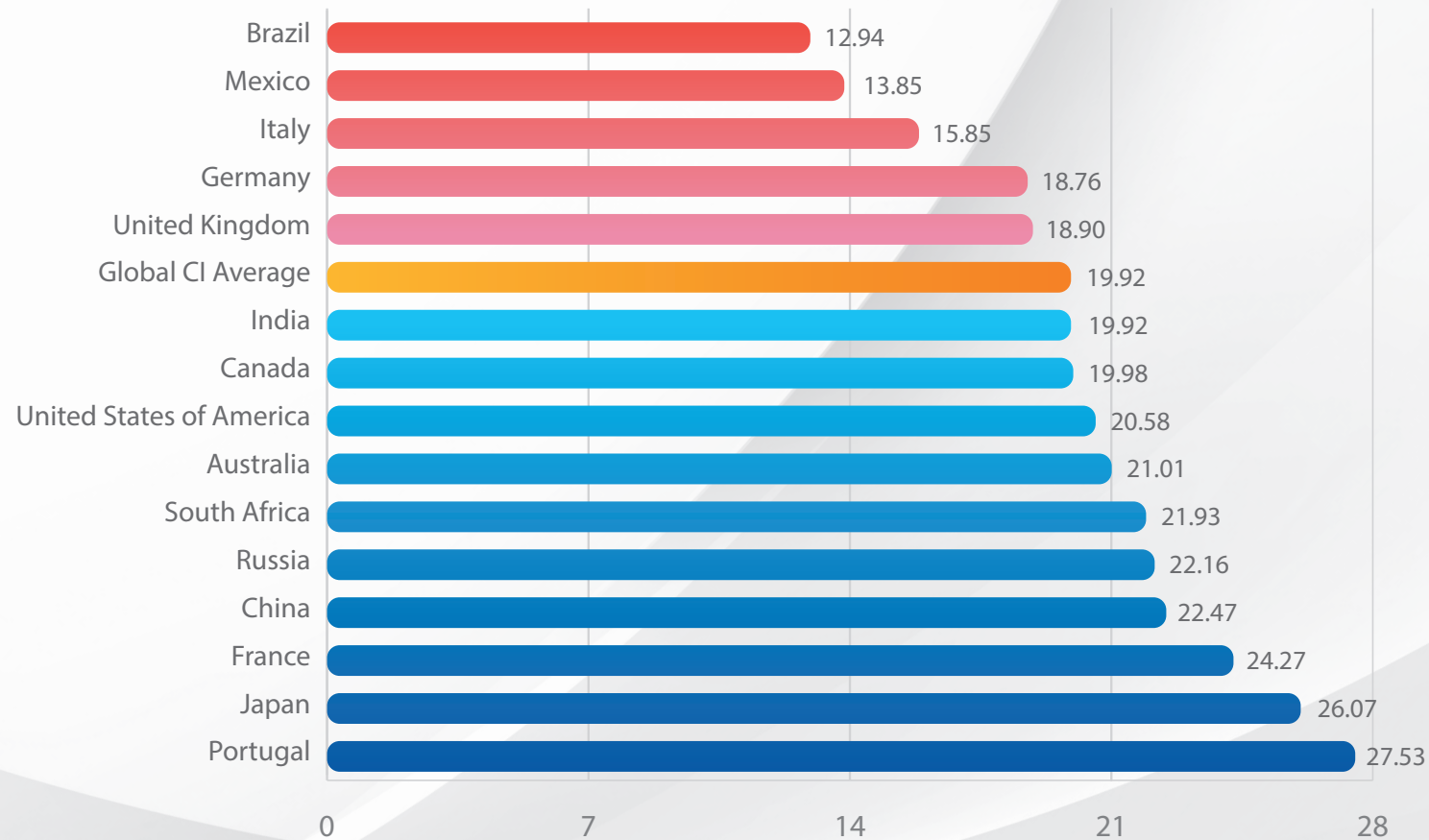
The media matters but confidence in dealing with them varies greatly

As further proof of the increased focus on influencers, the impact and role of the media was the #3 topic discussed (see Chart #1). It's also a major area of concern, producing the lowest CI score for a topic of 18.83 (see Chart #2).

Leaders in Brazil are the least confident about connecting with the media, with a score of 12.94. Portuguese leaders are the most confident with a score more than double that of Brazil of 27.53. Five countries are below the Global CI average score.

CHART 9

Confidence about the impact and role of the media



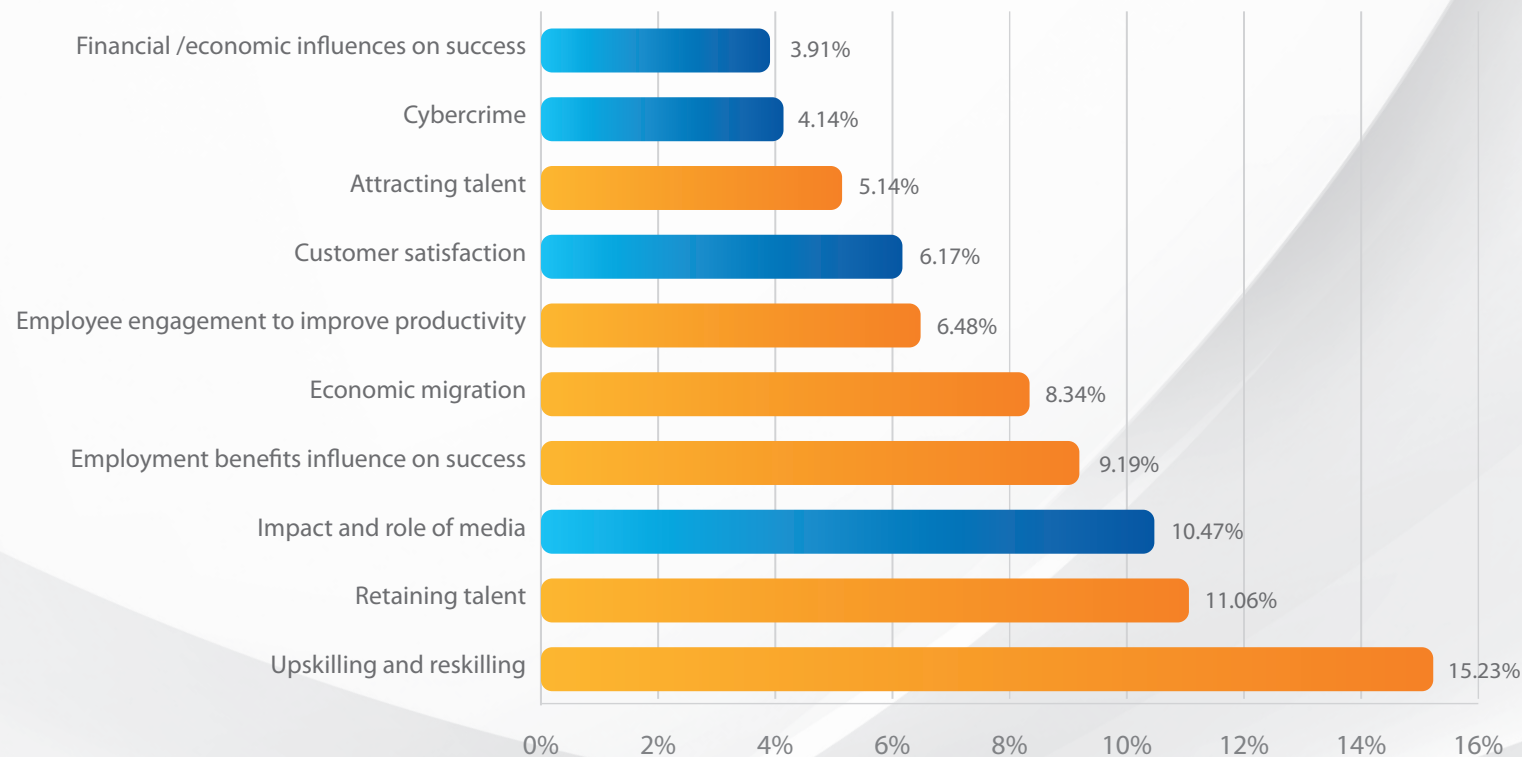
3. Employee-related topics dominate leaders' agenda

- Upskilling and reskilling the most discussed topic
- Employee-related topics take five out of the top six topic places
- Employees have lowest CI score of all audiences

In last year's Confidence Index, we highlighted the battle for talent that was underway. Perhaps we should have called it a war, because this year's topics show that employees are very high on the agenda of leaders around the world.

CHART 10

Employee-related topics dominate leader discussions



Although employees slipped to third in the list for leader attention (see Chart #3), employee-related topics dominate the issues discussed by leaders – representing five out of the top six topics and six of the top 10.

Leaders have developed a three-pronged strategy to attract and retain the best talent:

- Invest in upskilling and reskilling current employees – the #1 topic
- Invest in employee benefits – the #4 topic
- Invest in employee engagement – the #6 topic.

A mixed picture on confidence when it comes to employees

There is a very mixed picture for confidence when it comes to employee-related topics.

The submissions about the [Future of Work](#) in the Engagement Zone blog, show that, in the last year, many organisations have been focusing on improving the quality of the employee experience, and building a strong employer brand. And, according to the [Engagement 101](#), who contribute their thoughts in the [Engagement Zone](#), the efforts will become even more strategic.

“ In the last five years we have seen the area of employee engagement become more strategic, with much greater support from business leaders. The entries to our most recent awards clearly demonstrate the business value delivered by making employee engagement part of the DNA of a business. ”

Matt Manners
CEO The Employee Engagement Awards

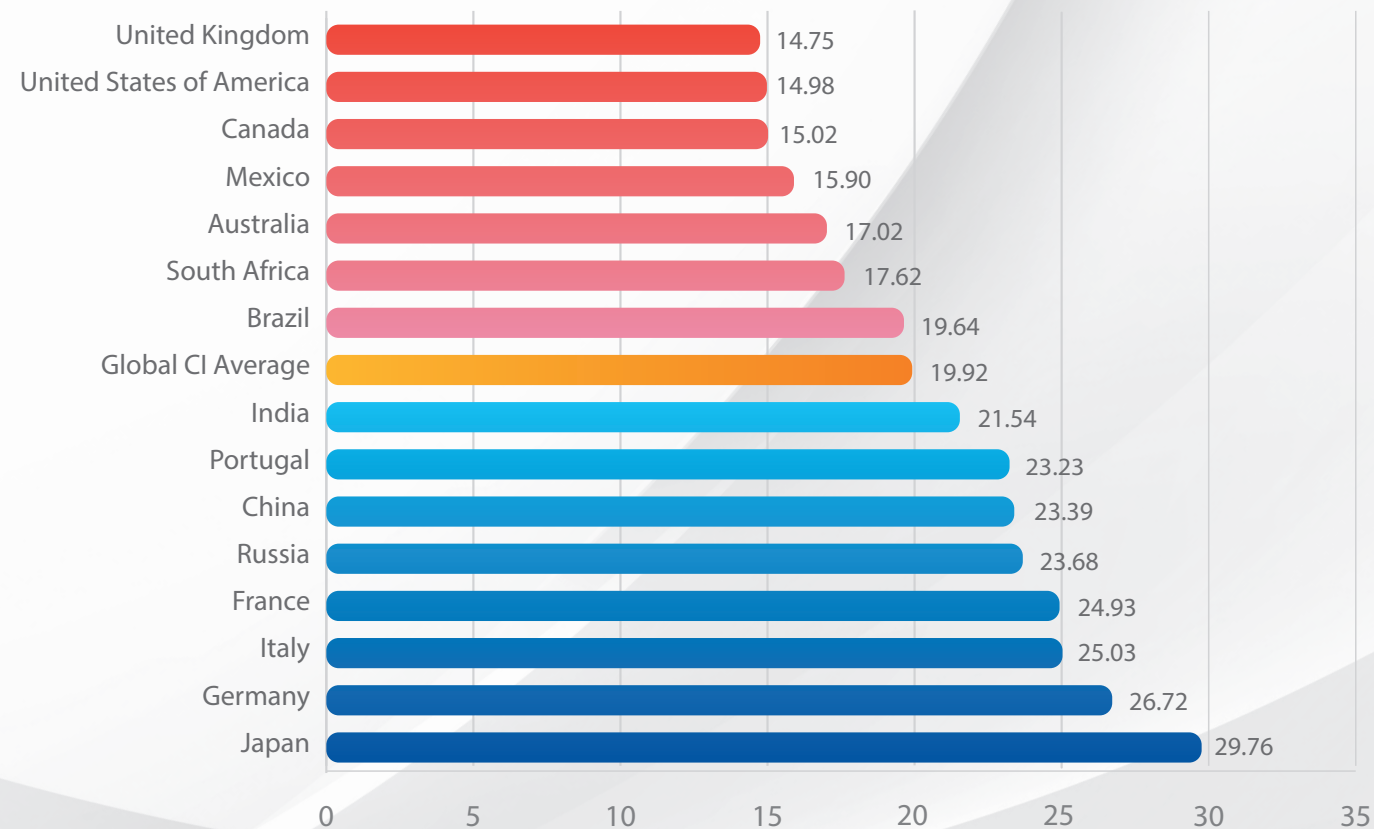
UK leaders have lowest confidence when it comes to retaining talent

Retaining talent leaps from the fourth lowest CI score last year, to the number four topic in the Index this year (see Chart #2). However, despite this move up the list, as part of the collapse in overall confidence, the confidence score for retaining talent has fallen by 10 per cent year over year.

Leaders in the UK have the lowest confidence about retaining talent (14.75). Leaders in six other countries see talent retention as a concern – the US, Canada, Mexico, Australia, South Africa and Brazil. The confidence levels of leaders in Japan are more than double the UK at 29.76.

CHART 11

Confidence about retaining talent



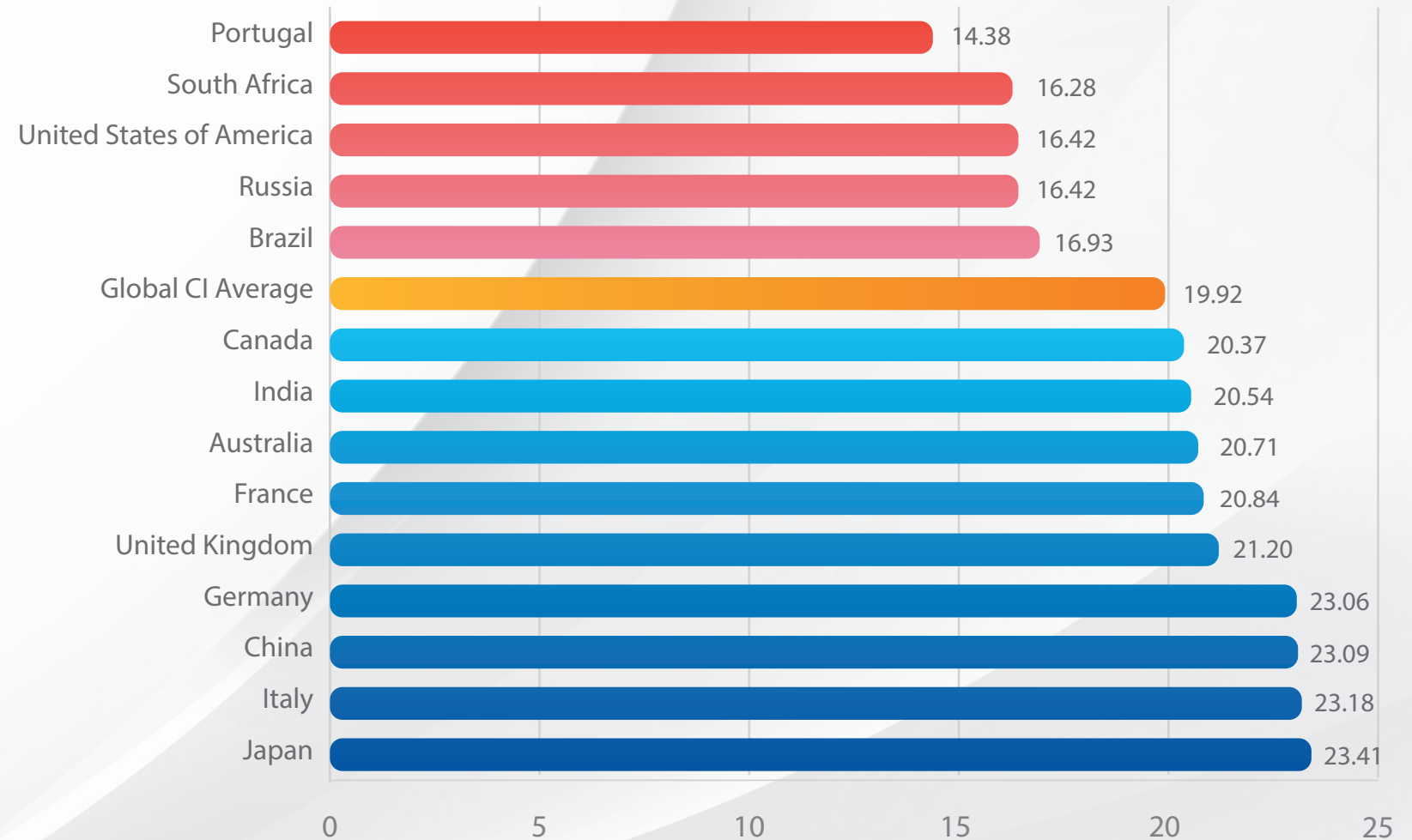
Attracting talent has moved from the second to last place last year, to fifth in the Confidence Index this year (see Chart #2). It has suffered about a third of the average decline in confidence at seven per cent.

Last year, leaders identified attracting talent as having the most influence on their success. This may explain the shift in position this year. It obviously remains a significant area of focus, as attracting talent was the eighth most popular topic.

Japanese leaders are also the most confident about attracting talent (23.41) but less so than for retaining it. Attracting employees is a cause for concern for leaders in Portugal who have a CI score of just 14.38. Leaders in four other countries see this as cause for concern – South Africa, US, Russia and Brazil.

CHART 12

Confidence about attracting talent

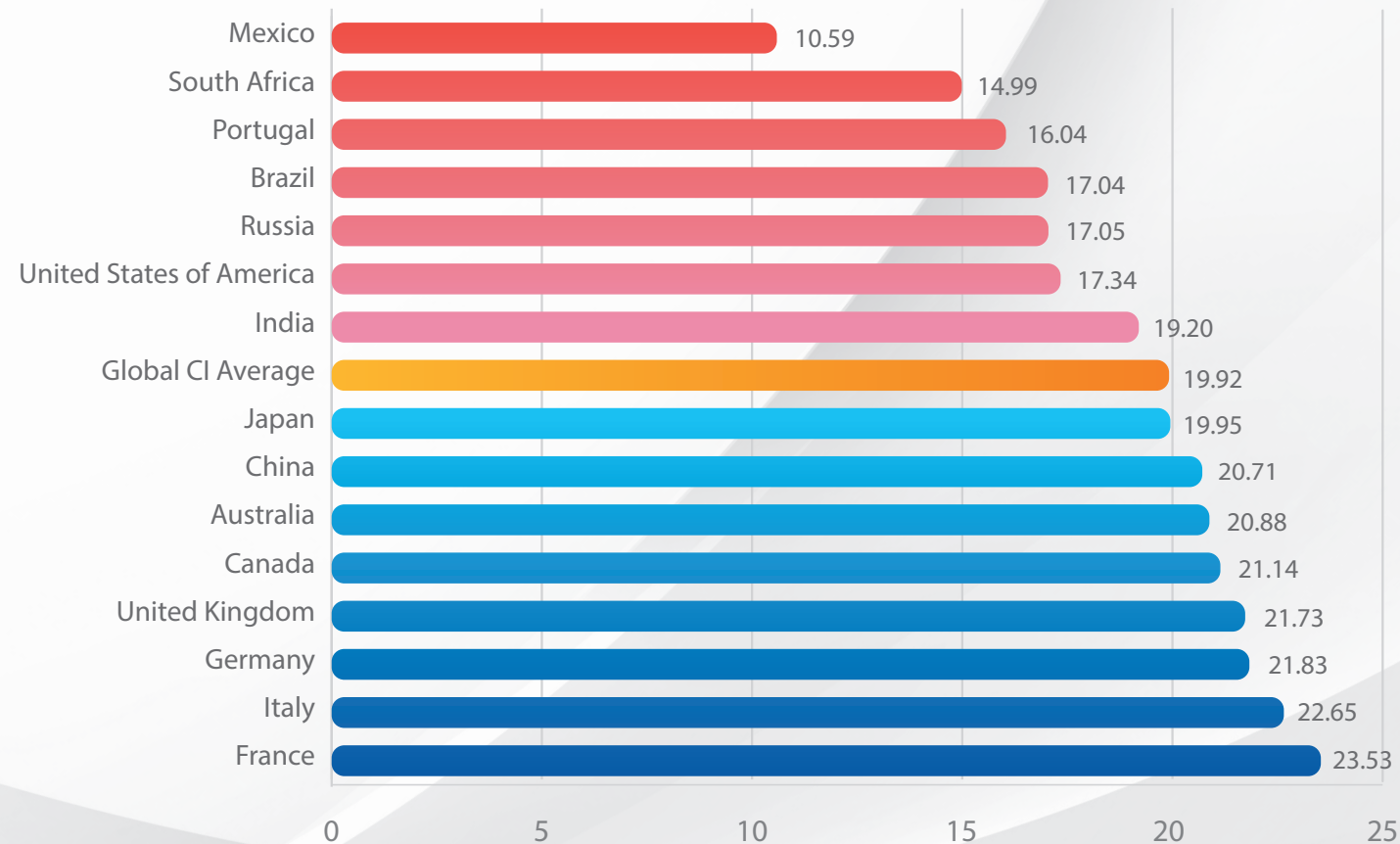


Employment benefits need to be a key part of your employee strategy

The influence of employment benefits on success has a wide range of CI scores. **Leaders in Mexico see this as a major concern, with a very low CI score of 10.59.** Leaders in six other countries are concerned about the ability to get employment benefits right to help fight the battle for talent – South Africa, Portugal, Brazil, Russia, US and India. It's perhaps not surprising that French leaders are most confident, with a CI score of 23.53, as France is often seen to be in the vanguard for enhancements to employee benefits.

CHART 13

Confidence about employment benefits influencing success

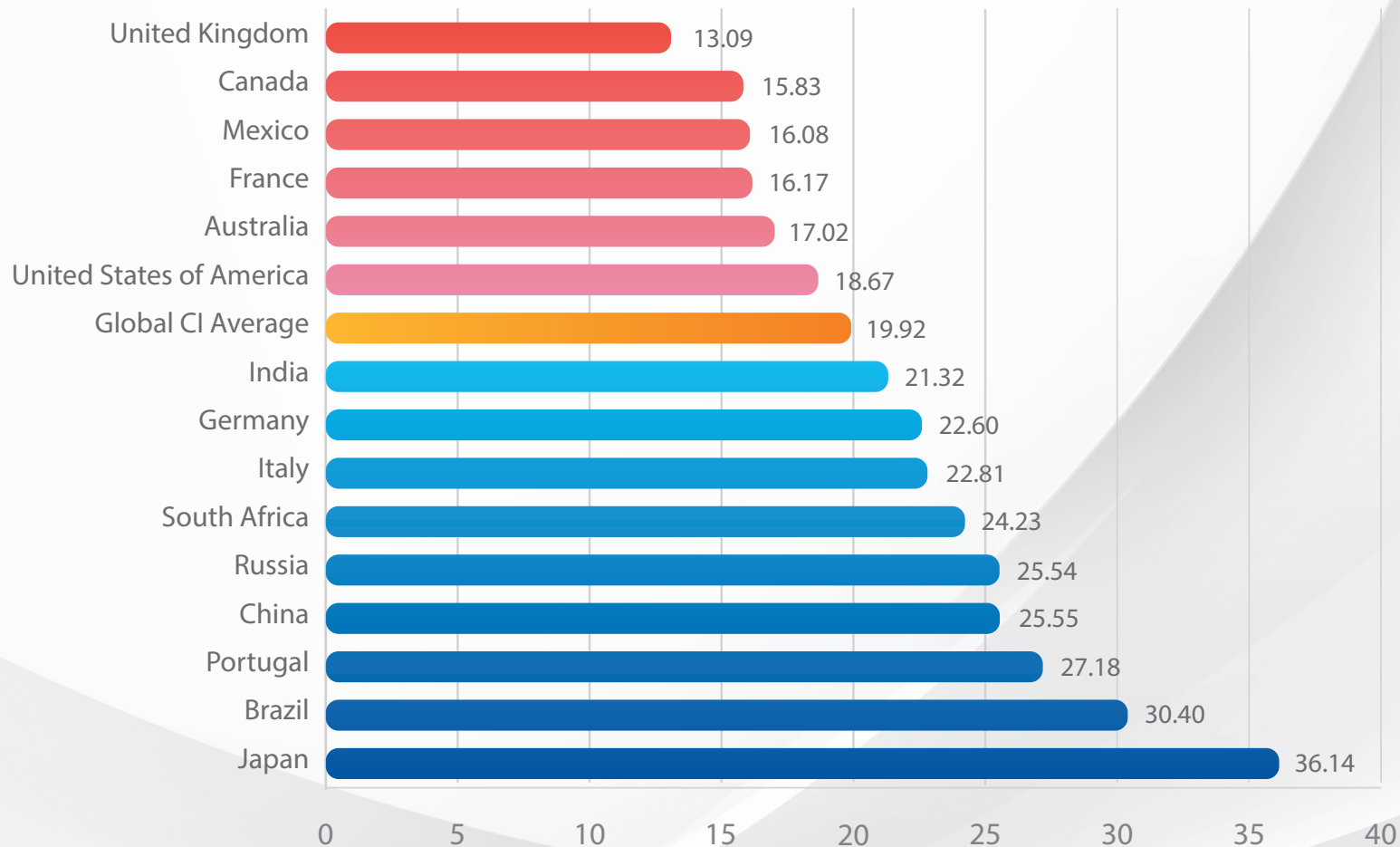


Upskilling and reskilling tops the topic agenda

[LinkedIn's report on workplace learning](#) shows that upskilling and reskilling will be centre stage in the battle for talent. CEOs obviously agree as it was the most discussed topic in this year's Index.

CHART 14

Confidence in the ability to upskill and reskill employees



Even though leaders are more confident about their ability to win the talent war, it's clear they still feel they have a battle on their hands. This is demonstrated by the fact that upskilling and reskilling is a concern - receiving a below Global CI average score of 19.55. This is particularly true in the UK, where leaders have the lowest CI score at 13.09. The leaders in five other countries see upskilling as a concern – Canada, Mexico, France, Australia and US. **Japanese leaders top this confidence table too with a score of 36.14 – almost three times the UK score.**

And, as further proof of the battle ahead, employees as an audience demanding attention, has the lowest confidence score in the audience Index at 17.75 (see Chart #4).

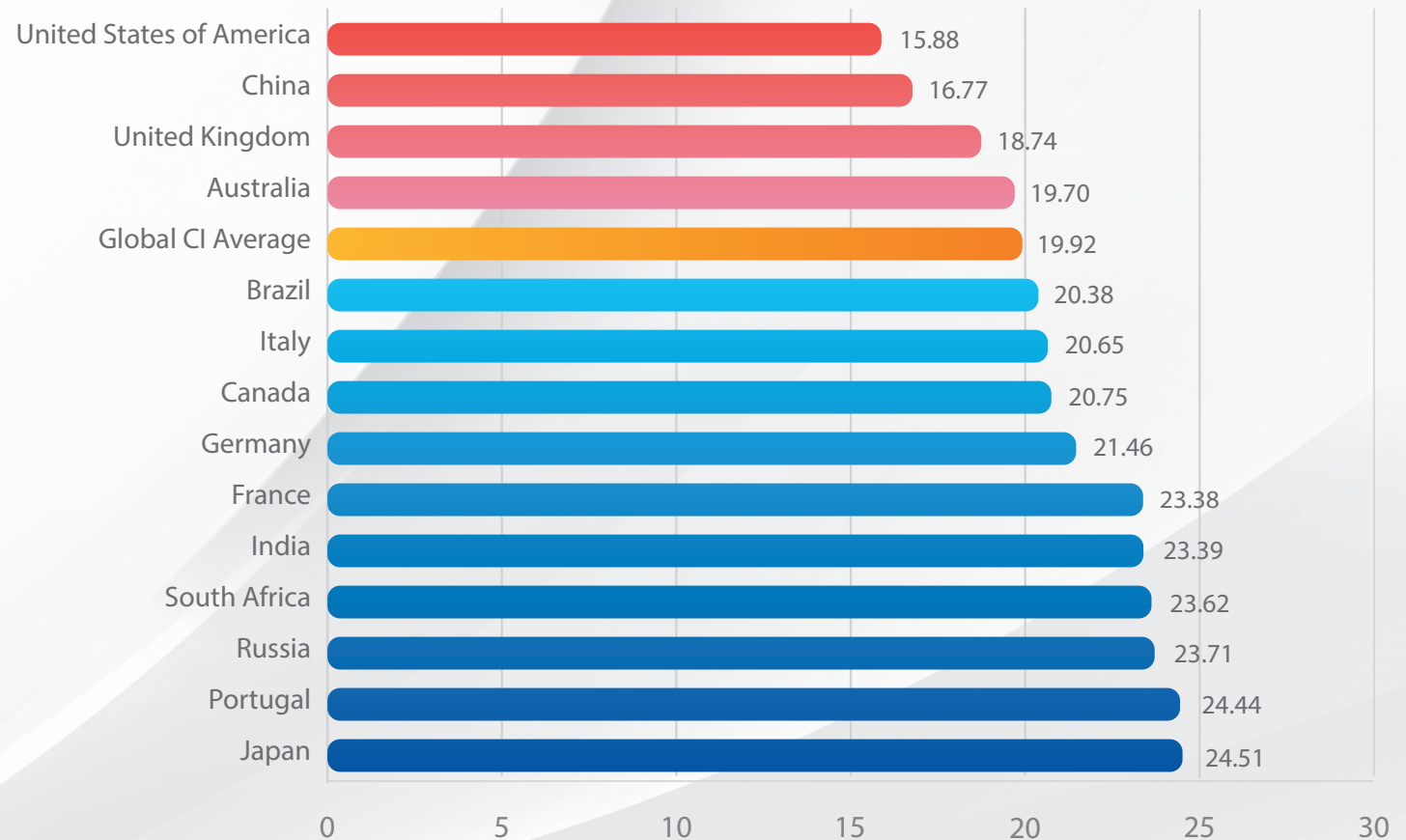
Economic migration a new issue in the battle for talent

One of the benefits of using ASI's AI approach is that we are able to uncover other trending topics. The fifth most popular topic is economic migration. This is no doubt a reaction to political changes that are further impacting the battle for talent and the available talent pool. These include issues such as: the US Government's policy changes for immigration, Brexit, the rise of far-right political parties in many countries around the world, as well as steps taken to attract talent by many countries. Economic migration is seen as a concern with a below Global CI average score of 19.67.

Leaders in the US are most concerned about economic migration. They have the lowest CI score for this topic at 15.88. This is almost 10 points lower than the CI score for Japan (24.51). Leaders in three other countries also see economic migration as a concern – China, the UK and Australia.

CHART 15

Confidence in economic migration

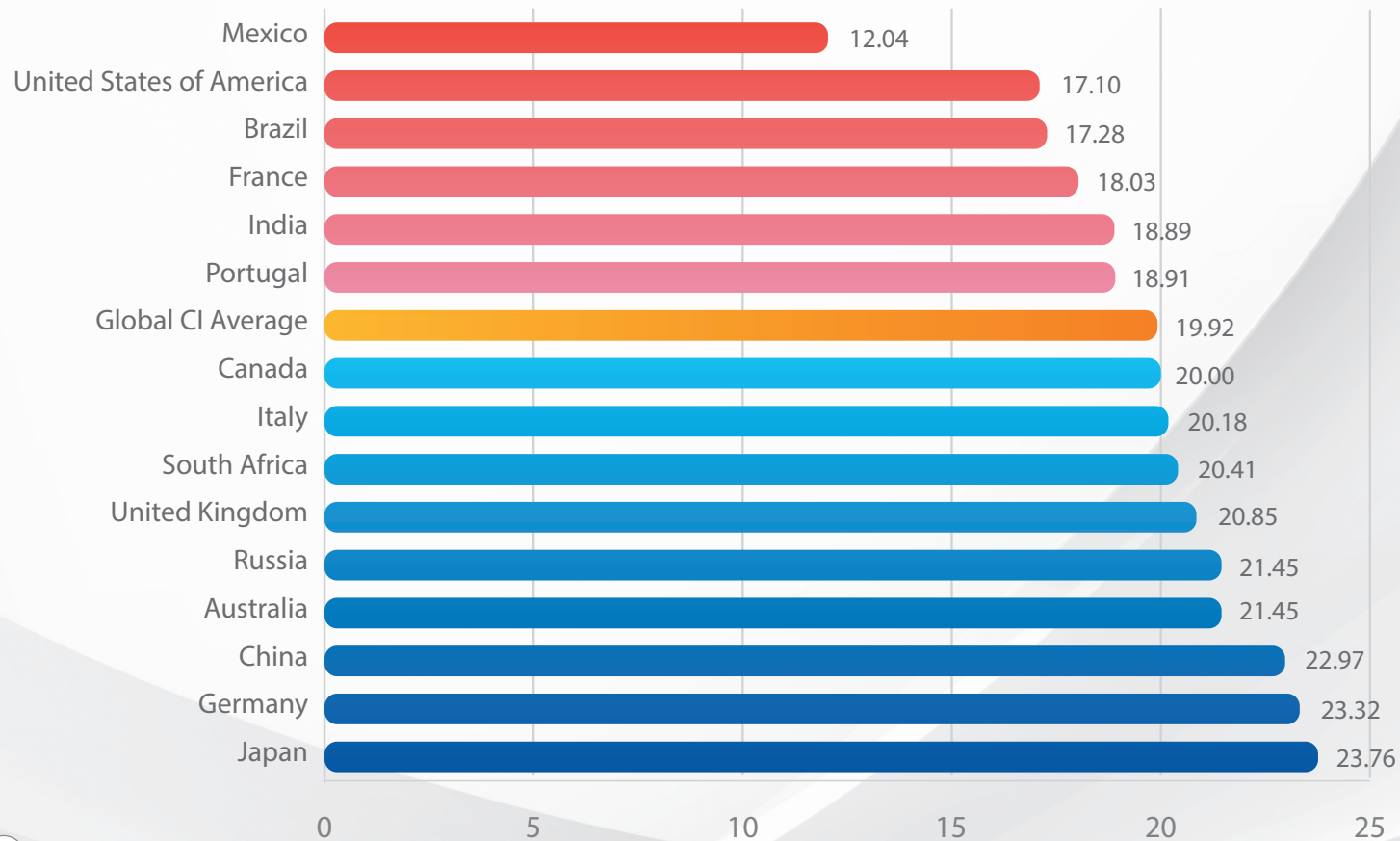


The benefits of employee engagement reflected in confidence shift

In 2018, the ability to increase productivity through employee engagement had the fifth highest CI score. In 2019, the topic moved to #3 in the Confidence Index, showing that leaders have made employee engagement a key part of their business strategy. While many countries have above average scores (see Chart #15) there are some notable exceptions. Mexico has the lowest CI at 12.04. And **US leaders obviously think they have work to do on the engagement front, as they have a CI score of 17.10. Leaders in Brazil, France, India and Portugal also see this as a concern.**

CHART 16

Confidence in employee engagement to improve productivity



Ruth Dance, Managing Director of the [Employee Engagement Alliance](#) the membership organisation for engagement professionals around the world, agrees there is a fundamental shift taking place.

“ Organisations are proving that focusing on the employee experience for each individual is having an incredibly beneficial impact. Always on, continuous listening, consistent feedback and purpose-driven teams, are rapidly replacing traditional ways of working. ”

4. Leaders have concerns about their brand reputation and their ability to protect it in a crisis

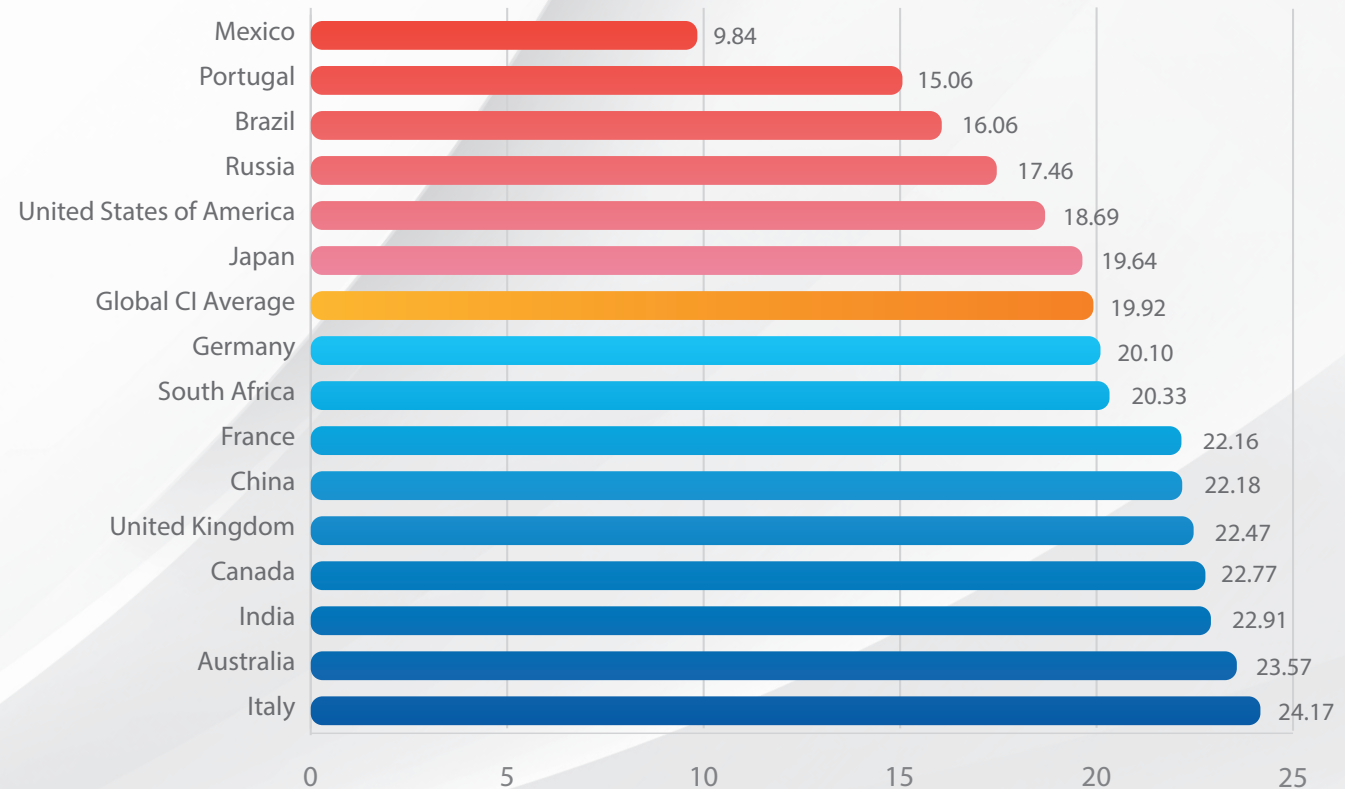
Crisis management has the second lowest topic score in the Index

Confidence in corporate image and brand reputation has fallen from #8 to #21 in the **Confidence Index**. The CI score is down 23 per cent from 25.2 to 19.44. Both CEOs and CMOs see this as a concern, with the CMOs scoring 12 per cent lower at 17.3.

Around the world, the most concerned are Mexican leaders with a score of 9.84. Leaders in Portugal, Brazil, Russia, US and Japan are also concerned. Italian **leaders are much more confident** with a score of 24.17. Perhaps this isn't surprising as Italy is often seen as the home of iconic brands.

CHART 17

Confidence in corporate image and brand reputation

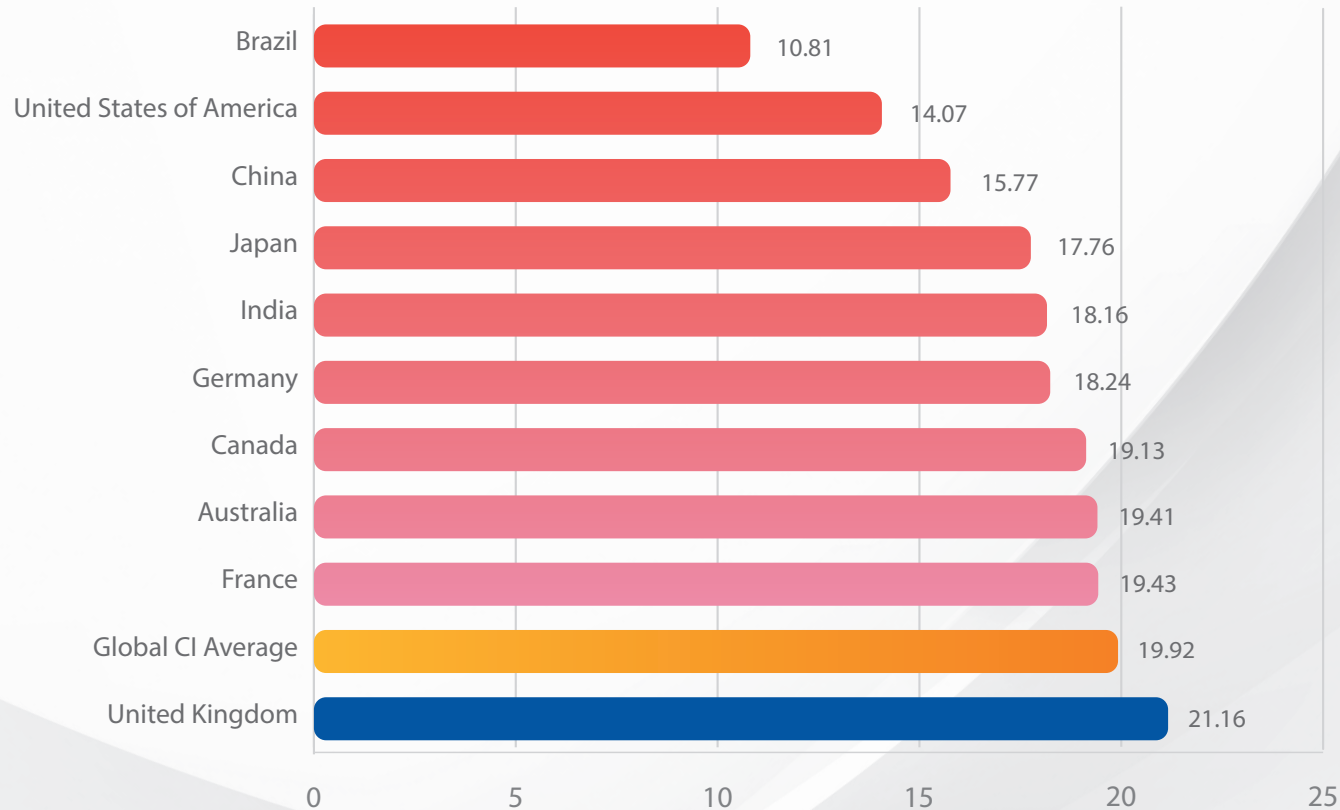


Leaders concerned about unacceptable behaviour

Unacceptable behaviour, such as sexual harassment, can have a significant impact on reputation. This is seen as a borderline concern in the Index with a score just above the Global CI average of 19.92. This middle of the road score hides marked differences around the globe.

CHART 18

Confidence in the impact of sexual harassment



Brazil has the lowest score at 10.81. The UK has the highest score at 21.16 and is the only country with an above Global CI average score. This suggests UK leaders believe they have the policies and procedures in place to minimise the risk of sexual harassment in the workplace. US leaders, however, have a significantly below Global CI average score of 14.07, suggesting that leaders continue to have concerns about this topic. This concern is shared by leaders in all the other countries apart from the UK.

Crisis management has the second lowest topic score in the Index

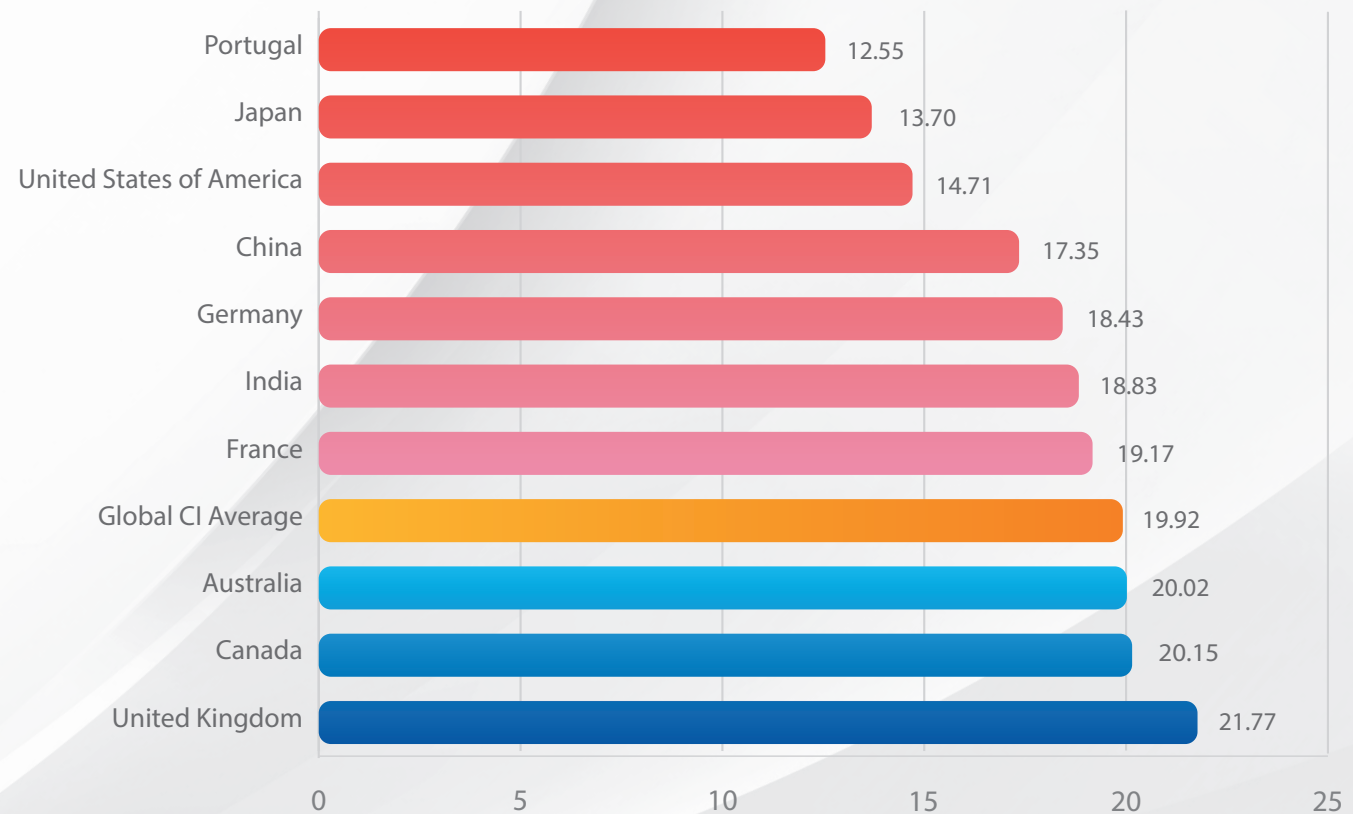
The ability to protect your brand in a crisis has fallen from #11 to second to last (#22) in the Confidence Index (19.09). This is now a major concern for leaders. This is perhaps a reflection of the reaction to the [#MeToo movement](#), which has seen the public, and the media, demand that leaders actively denounce those accused of bad behaviour.

Leaders in Portugal seem most concerned about crisis management. Their score of 12.55 is significantly lower than the 21.77 score for leaders in the UK. Leaders in Japan, US, China, Germany, India and France are also concerned.

Leaders of large and very large businesses are also concerned. They both have a score of 18.98 which is below the Global CI average score for the topic. All CEOs score slightly higher at 19.08.

CHART 19

Confidence in ability to protect brand in a crisis

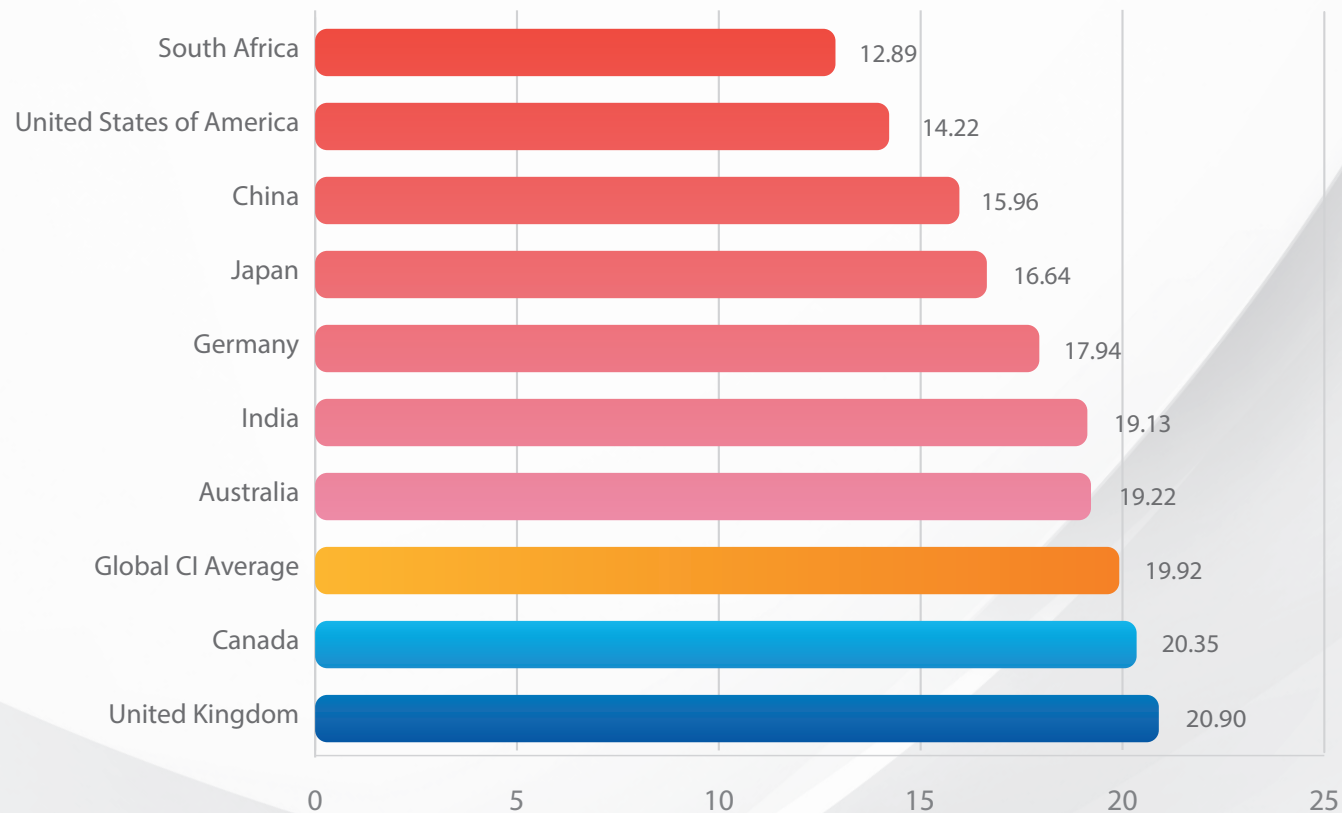


5. Global trade agreements and tariffs undermine confidence

This year confidence has imploded. One of the clear contributing factors is the topic of global trade agreements and tariffs. This is the third lowest topic in the Confidence Index with a score of 19.13.

CHART 20

Confidence for global trade agreements and tariffs



South Africa sees this as a major concern (12.89) whilst the UK has the highest confidence at 20.90. The US has a significantly below average CI which may be a result of the reduction in US exports to China as reported by [Bloomberg](#). As the Bloomberg article says, *'nobody benefits from this trade war'* and many leaders around the world seem to agree.

UK leaders' confidence remains high at 20.90. But the dreaded Brexit still looms, and this score may well be lower in the 2020 study!

6. Confidence in the ability to satisfy customers declines – especially in US - but remains higher than other business topics

As reported earlier, customers slipped from first to second place in terms of the audiences getting the most attention (*see Chart #3*). The average CI for customer satisfaction also dropped from first to second place in the topic Index. At 21.83, this represents a fall of 30 per cent from last year's figure of 31.3.

This is almost 50 per cent higher than the average decline in confidence and demonstrates that leaders feel they may have a tougher time to satisfy customers in the months ahead. This may be a reflection of concerns about other factors outside their control, such as global trade tariffs.

The least confident about satisfying customers are leaders in the US – the only country to show a below Global CI average score (19.50). Italian leaders are the most confident, with a score of 30.22. **CEOs are nine per cent more confident about customer satisfaction than CMOs.** And, leaders who are over 65 are 33 per cent more confident (22.84) than the lowest scoring age group, 45-54 (17.12).

CHART 21

Confidence for customer satisfaction



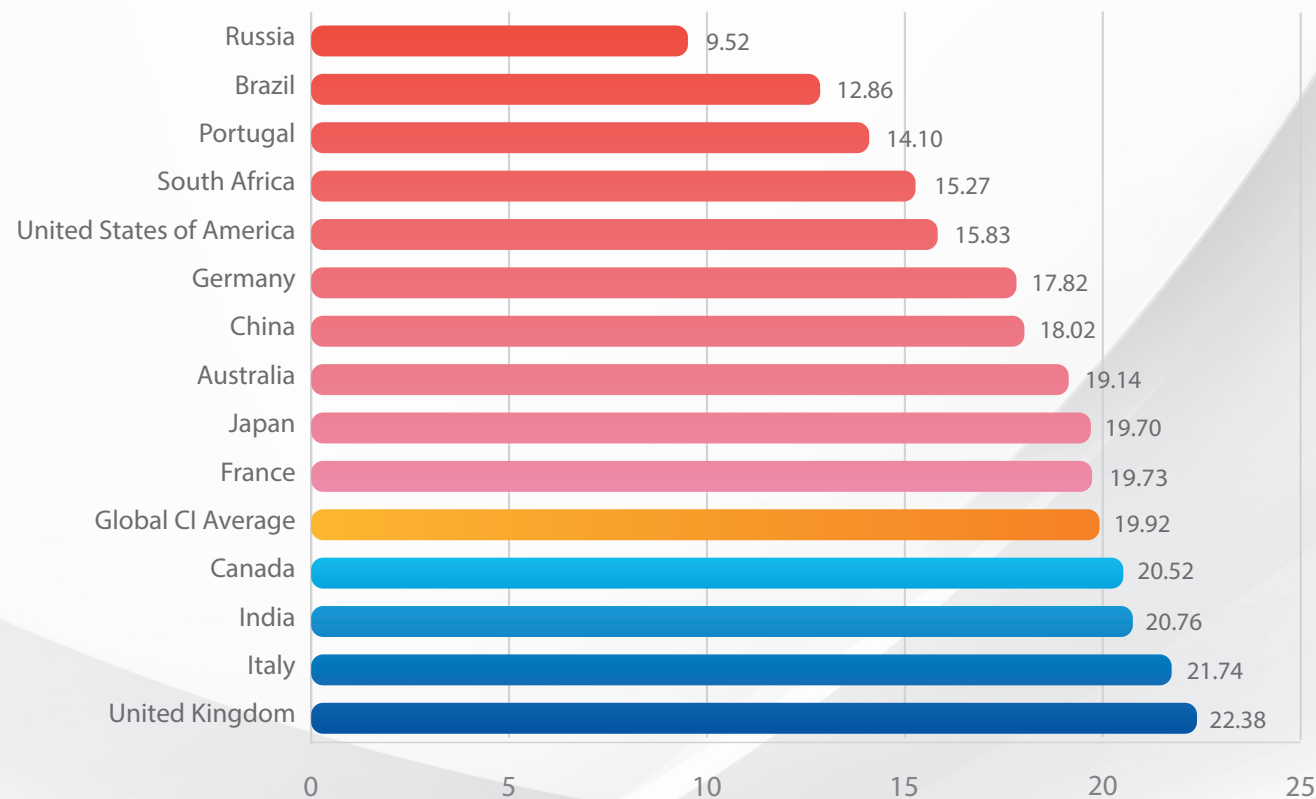
7. Global CI scores show that events that affect us all, like global warming, trigger very different reactions in our leaders

Huge range of feelings about macro issues such as global instability and extreme weather

This is the first year we have produced Confidence Index scores for macro scale issues such as global instability and extreme weather. The results show that leaders still take a local rather than global view about the impact of these issues. For example, global warming and extreme weather has an above Global CI average score (see Chart #2).

CHART 22

Confidence about global warming and extreme weather events

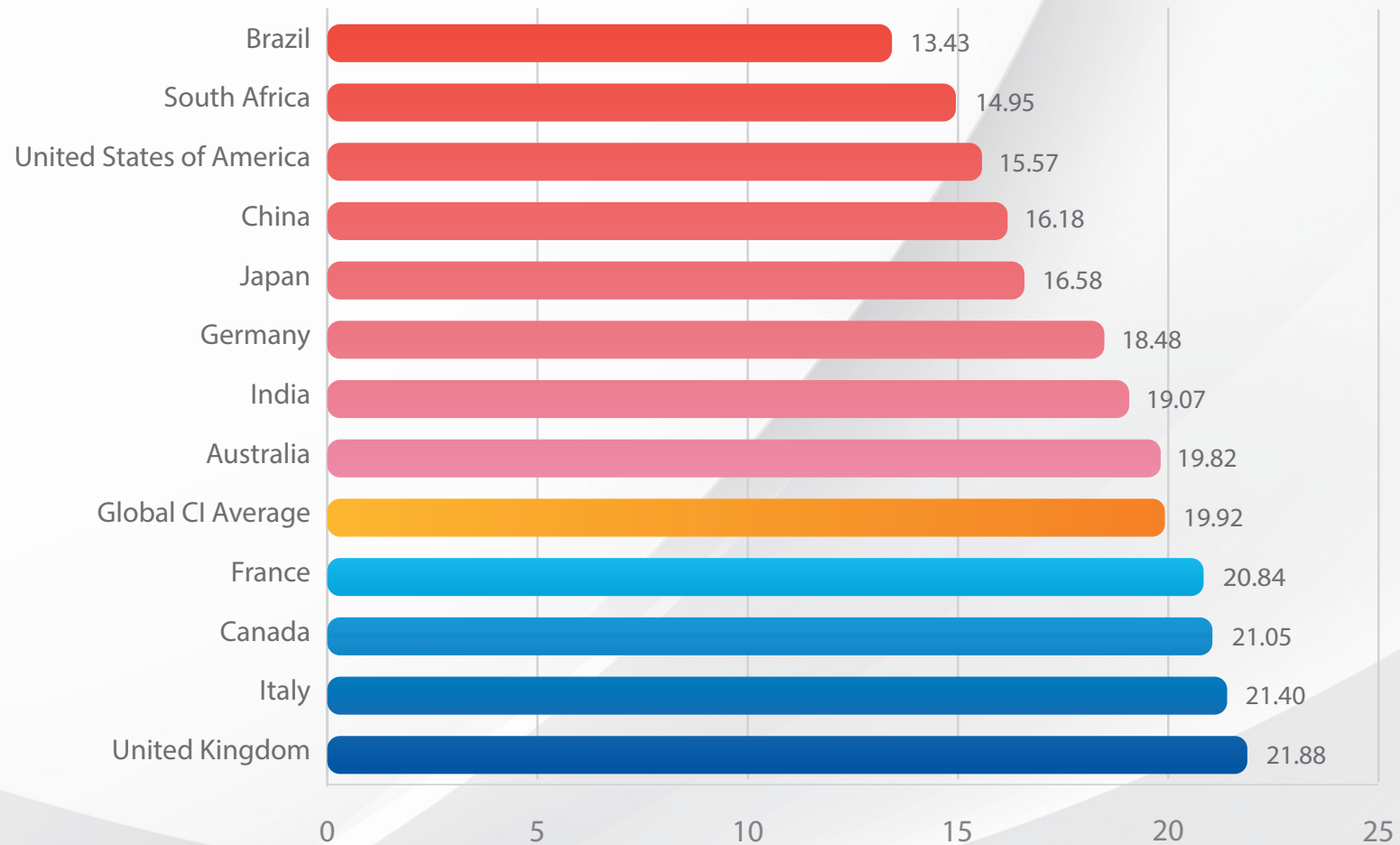


However, Russian leaders score only 9.52, while leaders in the UK score 22.38. **Leaders in eight other countries see this as a concern, including China, the US, Australia and Japan.** The [recent paper on the need to invest to lessen climate change](#) shows businesses could receive a significant dividend (\$7 trillion) for doing so. The scores in this year's Index suggest that many leaders will need a lot of persuading to follow the report's recommendations.

Global instability and the threat of war is seen as a concern – with a below Global CI average score of 19.47. Again, there is a huge range in feeling. Brazilian leaders see this as major concern, with a score of 13.43. Leaders in seven other countries also see this as a concern. UK leaders feel much less anxious, with an above Global CI average score of 21.88.

CHART 23

Confidence about global instability and the threat of war



8. Government and legislators getting much more attention and their changes are a cause for concern

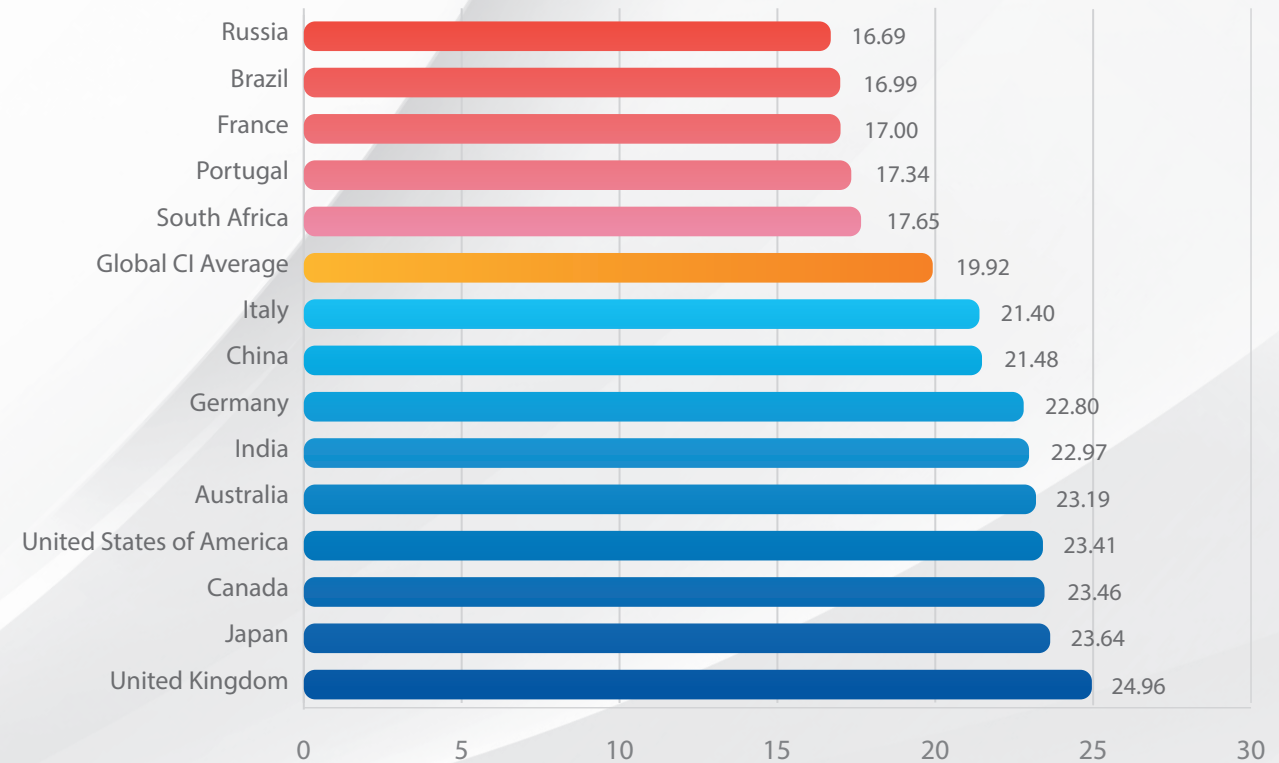
Last year changes by government and legislators were seen as the biggest threat to plans. Leaders remain concerned. This topic has the fourth lowest CI – appearing at #20 in the **Confidence Index** for topics (see Chart #2). Leaders are even more concerned about their ability to give this audience attention. This had the third lowest CI score for audiences of 18.34 (see Chart #4).

Last year's effort on Data Privacy and Protection pays off with #1 ranking in Confidence Index

But giving planned legislative changes attention – such as GDPR – pays off. **This year, data privacy and protection has the highest score of all topics**, at 22.02. Like all the issues, this is not universally the case. The UK tops this particular league table with a score of 24.96 and Russia comes last with 16.69. Leaders in Brazil, France, Portugal and South Africa are also concerned.

CHART 24

Confidence about data privacy and protection

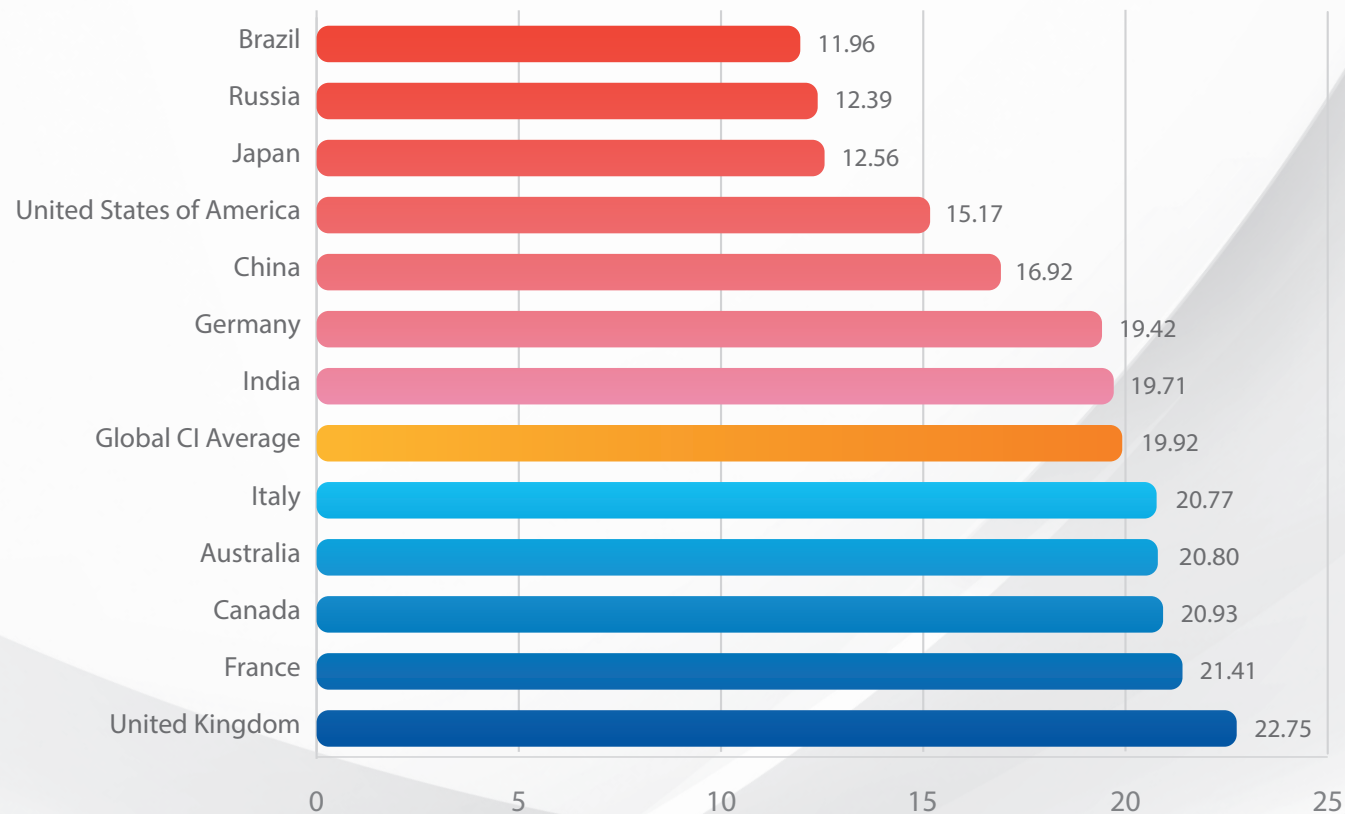


9. A marked shift in attitude to the impact of the way political leaders communicate on social media

In the 2018 report there were mixed views about the impact of the way political leaders like Donald Trump use social media channels. This year we have given the topic a CI score. It is seen as a concern in seven countries and three regions. The range across the globe is from 11.96 in Brazil to 22.75 in the UK. Leaders in the US see it as a concern, with a score of just 15.17.

CHART 25

Confidence about the way political leaders communicate on social media



Only leaders of medium size companies have a moderately confident view at 20.13. All other businesses see it as a concern. Similarly, CEOs are concerned (19.72) but CMOs mildly confident (20.14).

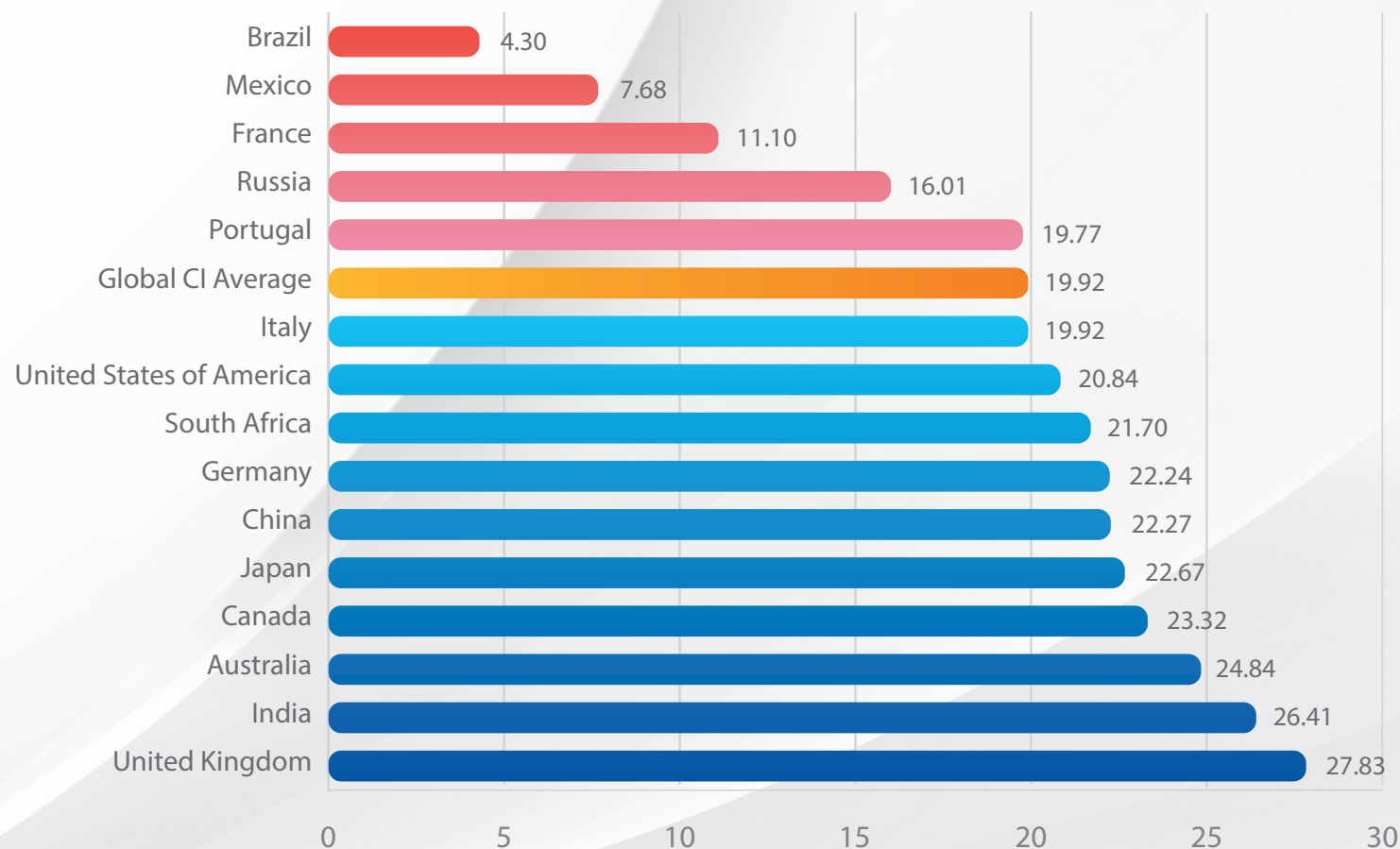
10. Cybercrime no longer a cause for concern

Cybercrime has moved from last on the Confidence Index in 2018 to #7 in 2019. Although the score has declined 6 per cent to 20.93, it is now above the Global CI average and no longer a concern for leaders. This may be because until recently there have been fewer large-scale hacks reported in 2019 than in previous years. The recent [Apple iOS hack story](#) shows that there is no room for complacency, particularly as hacks are becoming even more targeted.

However, while the confidence about cybercrime is above average this year, there is a huge range in CI scores across countries and age groups. **Leaders in Brazil have very high concern about cybercrime** with the lowest CI score of just 4.30. At the top end of the scale is the UK, with a score of 27.83. French leaders are very concerned (11.1). Young leaders (under 25s) are 24 per cent more confident (24.88) than over 65s (20.13) – the lowest scoring age group.

CHART 26

Confidence about Cybercrime



The Anatomy of Confidence and Concern

+65s

Most confident

-44%

The decline of CI score for North America

+16%

Male leaders more confident than female

Top Findings

The Top 10 Findings demonstrate a range in confidence and concern across regions, organisation sizes, leadership roles, ages and gender. These differences are explored more fully in the charts below.

CEOs more confident than CMOs and their topics of confidence and concern have some telling differences

1 CEOs are 13 per cent more confident than CMOs who have a below Global CI average score of 18.91. CI scores for both have declined since 2018.

2 Three topics that CEOs are most confident about do not appear in the CMOs top five. These are: **customer satisfaction, employee engagement and retaining talent**. They are replaced on the CMO's list by cybercrime, family mentorship influences success and employment benefits influence success.

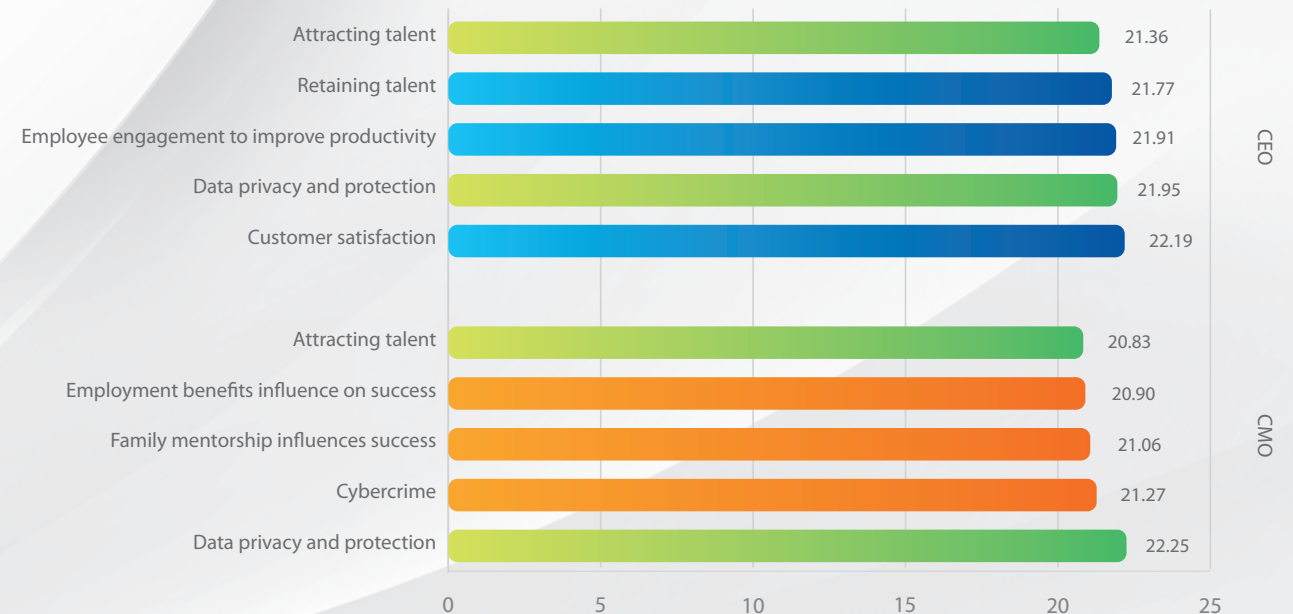
CHART 27

Confidence levels of CEOs and CMOs



CHART 28

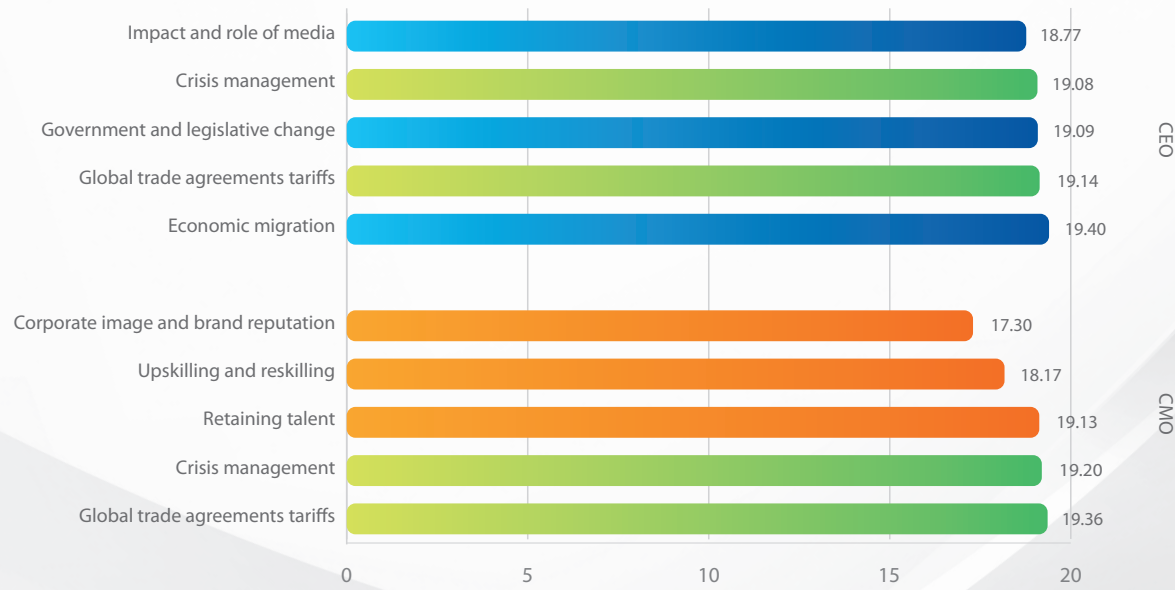
Top 5 topics of confidence for CEOs and CMOs



3 CEOs and CMOs share concerns about global tariffs and crisis management but their other anxieties differ. CMOs are concerned about retaining talent (perhaps a reflection of the more mobile workforce in the marketing industry), upskilling and reskilling and, corporate image and brand reputation. CEOs are concerned about economic migration, government and legislative change and the impact and role of the media.

CHART 29

Top 5 topics of concern for CEOs and CMOs

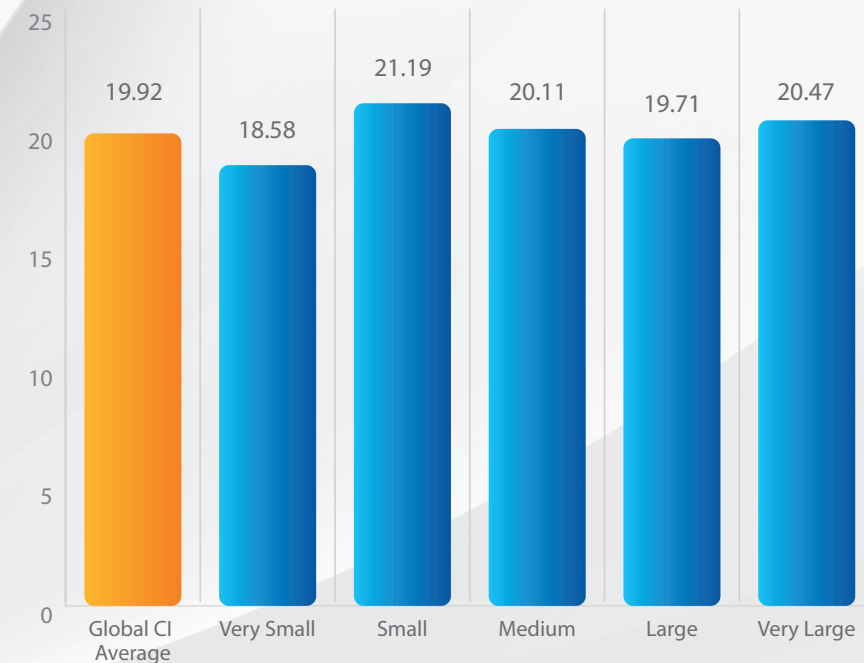


Confidence varies by organisation size with small businesses having the highest CI score

4 Leaders of small organisations (101-250 people) are the most confident, followed by very large and then medium sized companies. Leaders of large organisations (501-1000) have a below Global CI average score of 19.71 but the lowest CI score is for very small organisations (50-100).

CHART 30

Confidence by size of organisation

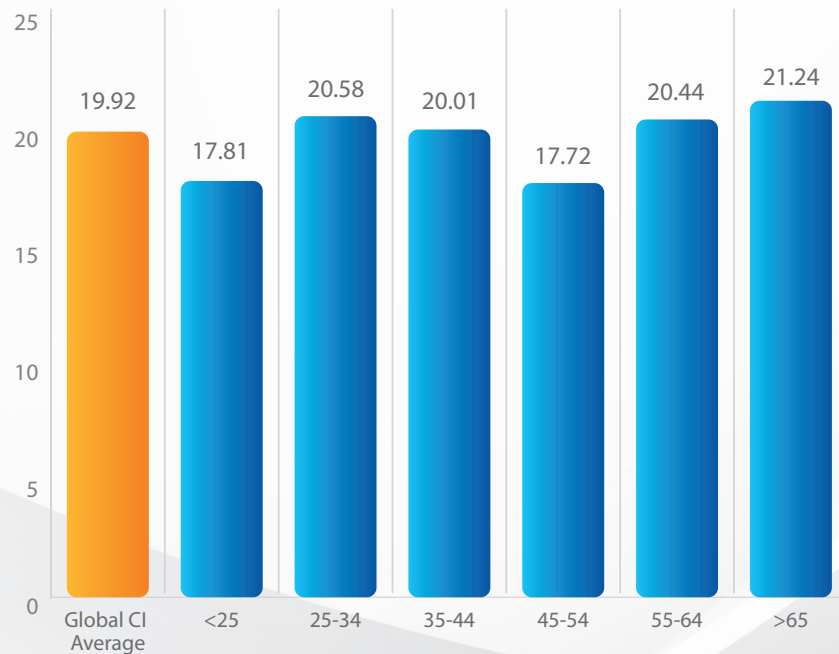


Confidence seems to grow with age – with one significant exception

5 **Leaders older than 65 are the most confident** with a score of 21.24. This is 20 per cent higher than the 45-54 age bracket who scored the lowest (17.72). The youngest leaders have a similarly low CI score of 17.81. These fluctuations in confidence between ages could present some interesting challenges as organisations seek to set their strategic direction and goals.

CHART 31

Confidence by Age



Male leaders more confident than female

6 **Male leaders are 16 per cent more confident than female leaders** who have a below Global CI average score of 18.35. CI scores for both have declined since 2018.

CHART 32

Confidence by gender

Males are more confident than Females by

+16%

Male confidence since 2018

-21%

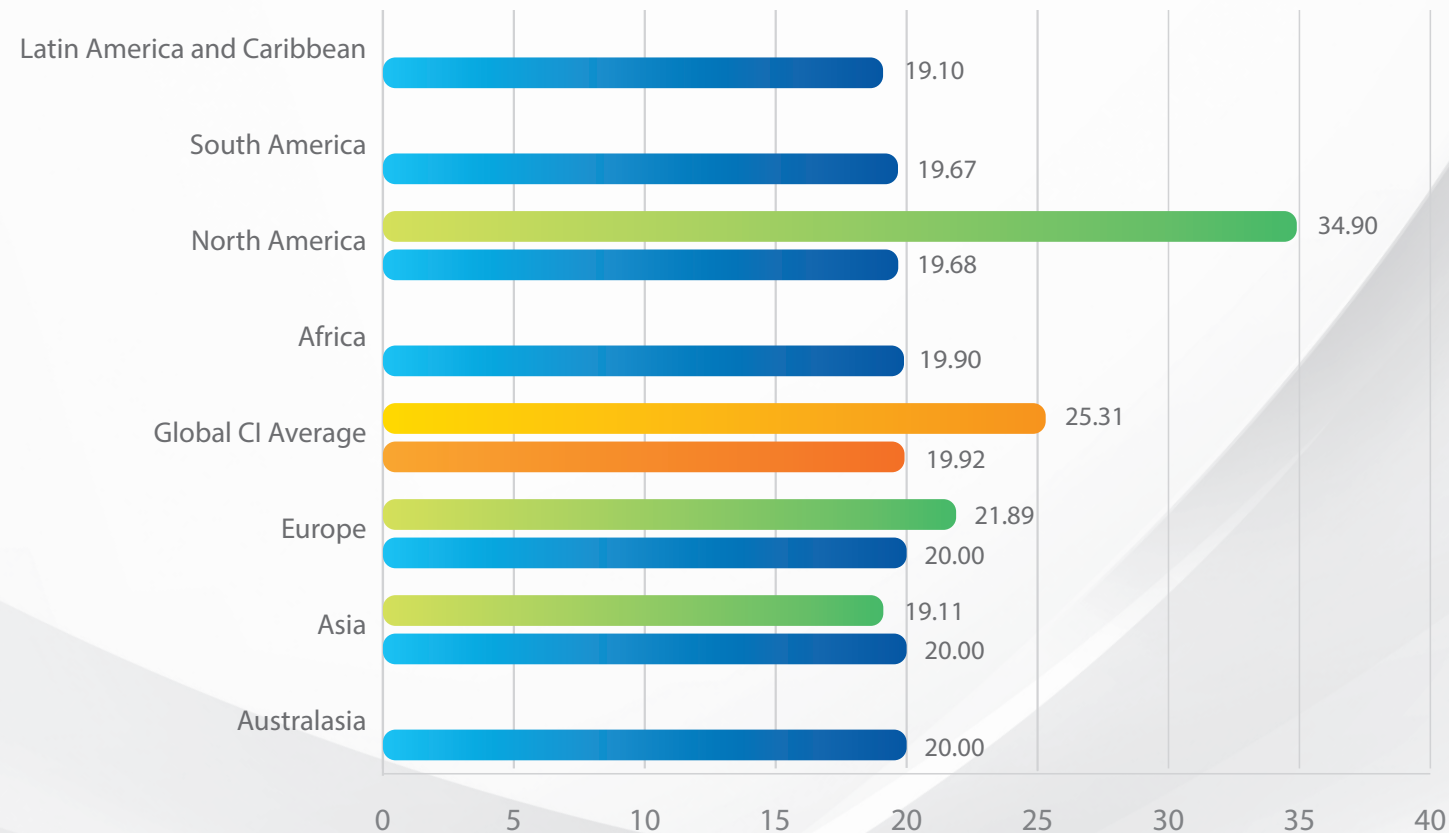
Confidence of North American leaders collapses

7 North America, which had the highest CI score for a region in 2018, has fallen to fifth place in the table. Confidence levels in North America declined 44 per cent – twice the average decline. Latin America, South America and Africa also have below Global CI average confidence scores. Confidence in Asia has improved slightly since 2018.

The charts below provide CI scores for the regions in this year's study and show year on year comparisons where these exist.

CHART 33

Confidence by region



Confidence in North America

-44%

Methodology

**A new, breakthrough
AI-fuelled approach**

Using a new method to enable robust comparisons



In 2018, with the help of two respected independent research firms, we captured feedback from 540 business leaders in seven of the world's largest economies and across the three main regions – Asia, Europe and America. Their responses created the first Worldcom Confidence Index.

The insight we gathered was invaluable in creating a benchmark for the confidence levels of business leaders. However, it was based on responses to questions we asked rather than on the topics that CEOs and CMOs were talking about in online channels.

So, we decided to adopt a new and breakthrough way of understanding the issues that concerned leaders – and their confidence levels in addressing them. As a result, we commissioned Advanced Symbolics Inc. (ASI), a research company that uses artificial intelligence (AI) to create truly representative understanding of what audiences are saying.

By using ASI's AI tool, Polly, we were able to capture and analyse the online contributions, in nine languages, of **58,374** business leaders. This enables us to identify which topics were highest on the leadership agenda, and how confident or concerned leaders were about the topic.

Using the differential confidence method to enable robust comparisons

Using the total sample size confidence, the expected number of confident responders was extrapolated. For example, if the sample for CEOs of very large (1000+) companies in Canada is 253 people, then the expected confident responders is 53 people (253×21 per cent).

The actual number of confident respondents is compared against the expected number and the difference is calculated. To further illustrate the concept, if 41 CEOs of very large (1000+) companies in Canada were confidently engaged on retaining talent, the difference is 12 less people than expected ($53 - 41$).

The ratio of the difference is calculated and added to the average confidence. Continuing the above example, 12 less Canadian CEOs is a decrease of 5 per cent ($12/253$). Five per cent is subtracted from the average confidence of 21 per cent giving a confidence for CEOs

of large Canadian companies as 16 per cent. This is the differential confidence method.

In most cases, the differential confidence is the same as the raw confidence, which is the ratio of confident responders divided by the number of people in the sample. In the above example, the raw confidence is also 16 per cent: $41 \text{ Confident responders} / 253 \text{ CEOs in the sample}$.

The differential confidence differs from the raw confidence when the sample for a segment (i.e. Job title) is small or the confident engagement is small. In these cases, the small denominator may exaggerate the change in confidence. The differential confidence minimizes the impact from small denominators, allowing accurate comparison between segments no matter the size.

Creating a representative sample and comparative data

A sample of 58,374 individuals who fit the 'global business leaders' classification was constructed from publicly available social media information using a patented process known as [Conditional Independence Coupling](#). Polly (ASI's AI) analysed the social history of the sample for the previous 12 months and determined if a person was engaged on a particular topic. If a person was engaged on the topic, the AI measured if the engagement indicated confidence in the topic (I am not worried about this area) or concern toward the topic (I am worried about this area).

For each topic, the percentage of people in the sample who engaged confidently on the topic was measured. For example, if 5,137 people were confidently engaged on "retaining talent", this is an 8 per cent confidence (5,137 / 58,374).

When changing methodologies, comparing against past numbers can be tricky. In many cases the best approach is treating the new data independently from the old. Because online data is persistent, the calculations run for 2019 can be repeated on 2018 data. The 2018 calculations are compared against the previous methodology. Model heuristics are adjusted for the best match against the previous study. While not all numbers exactly match, most agree within statistical significance.

• Demographic splits

The following demographic details were collected as part of the methodology.

• Role

Only contributions from CEOs or CMOs/CCOs were captured.

• Gender

• Age

Participants were grouped in six age ranges:

- Under 25
- 25-34
- 35-44
- 45-54
- 55 - 64
- Over 65

• Business size

Four sizes groups were created:

- Very small 50 to 100 employees
- Small 101 to 250 employees
- Medium 251 to 500
- Large 501 - 1000
- Very large Over 1000 employees

PART 4

Worldcom's seven communications recommendations to increase the probability of success



The need for Purpose driven communications

Based on our findings, we offer the following communications recommendations to address the issues identified and the lower levels of confidence.

The study shows that leaders now see Influencers as an audience they must give attention to, but that employee-related topics dominate leadership thinking. It shows that macro scale issues, such as how an organisation manages the impact of global trade agreements and tariffs, need to be taken into account. It also shows that leaders are concerned about their ability to protect their brand in a crisis.

We believe that rigorously planned communications that always connect to your Purpose will increase your ability to succeed. As a result, you will see that Purpose runs through all our recommendations.



“ I’m not surprised employment benefits features so highly on the leadership agenda. If you want to win the war for talent and make people more productive, you need to get the total rewards mix right. This increasingly includes some potentially surprising areas such as providing employees advice for financial wellbeing. Our own [research](#) shows that you can undermine all your good work if you pay people late or make mistakes with their payroll. This has an incredibly damaging impact both on employee productivity and your employer brand. ”

John Petter
CEO Zellis

Make your organisation’s Purpose a magnet for the best talent

As we predicted last year, many organizations have increased their investment and activity to compete for the best talent. They are now investing in an array of areas to improve the employee experience to keep people loyal. Central to success in this area will be how committed you are to enabling your people to develop, and to link this personal development to the achievement of the organisation’s Purpose.

1

Differentiate your employer brand by promoting how you engage employees to deliver the organisation's Purpose. Show how your employee benefits reinforce your values and behaviours.

In our 2018 report we recommended all organizations involve employees in defining the values and behaviours. This year we recommend companies build on that by promoting how they involve their people in delivering the Purpose for the company. Setting up a careers channel on YouTube, which highlights the role and contribution of employees, is a very simple way to do this.

The 2019 Confidence Index shows that getting employment benefits right is vital to attracting and retaining the best talent. But employee benefits have evolved well beyond including things like free coffee, or quirky benefits like duvet days. Consequently, we recommend companies take a holistic approach to benefits that ties them to the Purpose and core values.

For example, if your core values say that you want to create a strong sense of community in the workplace, then the way you provide coffee needs to help build that sense of community. The Leesman Index identifies how the workplace drives employee sentiment. **Their [report](#) shows that coffee is more important than you may think.**

If your values say you want to create a happy and healthy workplace, then we recommend you review all your internal processes – with the involvement of your people – to make sure that you don't do things that undermine that goal. For example, research by Zellis shows that making mistakes with payroll or paying it late – can have a very negative impact on mental wellbeing, financial wellbeing, employee retention and your employer brand.

2

Link personal development to your Purpose so that employees recognise how their development adds value to the organisation. Use this to drive your upskilling and reskilling decisions.

We recommend that organisations make it very explicit how personal development contributes to the achievement of the Purpose. Too often we have seen a disconnected approach to learning and development that confuses employees about how their daily performance adds value. By making these connections stronger, you will not only reinforce the reasons why people joined the company but also create tighter emotional bonds that aid the retention and attraction of talent.

3

Support your Employee Engagement program by training all managers to operate by the tenets of the SCARF neuroscience framework.

The 2019 **Confidence Index** demonstrates that many leaders now see employee engagement as part of the DNA of a business. For engagement programs to be effective, however, every line manager needs to understand how to energise and involve each individual in their team. We recommend training all managers to operate according to a neuroscience framework called [SCARF](#). This provides each employee with the five innate needs their brain has for them to feel a valued and connected part of the organisation. The impact on productivity, innovation, business change, and employee happiness can be transformational.

Make sure you actively influence the achievement of your Purpose

The 2019 Index identifies the increasing importance of influencers and the need to make sure that the reputation of your business and brand is not only protected but grows in power and influence.

4

Behave like a confident organisation by making it clear to all audiences that the organisation has a very clear Purpose and a plan to achieve it. This includes explaining how the organisation will respond to the macro level challenges it may face.

Macro level issues such as global trade tariffs, extreme weather events, the threat of war etc., have increasing influence on success. Employees, customers, shareholders, suppliers and influencers want to understand how an organisation will respond to those challenges.

If you make the approach you plan to take very clear, it will satisfy one of the key tenets of SCARF – providing certainty. By explaining what will happen next, you will build confidence and eliminate the anxiety caused by the unknown. We recommend that the way you describe your Purpose explains how you will operate effectively in a changing and increasingly challenging world. This level of foresight and forward planning will demonstrate a high level of confident leadership.

5

Carry out regular risk/threat assessments and crisis response tests to protect your brand and reputation.

The same recommendation was in last year's report. The 2019 Index shows that challenges never go away and nor do the expectations that leaders will rise to them to enable the organisation to succeed. However, this year's Index shows that leaders are much less confident about their ability to protect a brand in a crisis. It is therefore essential that frequent risks assessments are carried out.

The conclusions of these risk assessments should then inform updates to crisis and issues policies and procedures. By demonstrating that an organisation is prepared for the worst, it will further demonstrate the leadership's confidence in the ability to achieve the organisation's goals.

6

Identify who will have the most influence over the success of your organisation and build programmes to develop effective relationships with them.

Business leaders have identified that influencers need more attention. The definition of 'influencer' will depend on what your organisation is trying to achieve. It could include traditional influencers such as journalists and bloggers, as well as other business leaders, activists, academics, researchers and analysts.

We recommend that you review your Purpose and the barriers to achieving it. Armed with the clarity this provides, we recommend you identify and communicate with the influencers that can help you to lessen or remove barriers to action, and those that can help to accelerate your success.

7

Help your customers to buy-in to your Purpose and show how it will satisfy their needs.

Our study shows that confidence in the ability to satisfy customers has fallen since 2018. One of the possible explanations may be that customers are very uncertain about how macro scale changes may impact an organisation's ability to meet their needs. For example, the British Government published its [Yellowhammer Factsheet](#) to explain how the Government is preparing to mitigate the potential reasonable worst case scenario impacts of Brexit, if the UK leaves the EU without a deal. As a result, millions of UK consumers may now have doubts about the ability of their chosen supermarket to meet their daily shopping requirements. In this case, it would make sense for UK supermarkets to make it clear what steps they are taking to protect supplies. This will not only inspire confidence that the supermarket is prepared to meet the challenge, but also show that it cares about meeting consumer needs.

We recommend that every organisation creates communications programmes designed to build confidence in the ability to meet customer needs. These programmes should use well-publicised challenges to accentuate the value that is delivered to customers. The old adage, 'out of adversity comes opportunity', is a neat summary of how organisations can use responses to challenges as a smart way to accentuate their difference and give customers more reasons to stay loyal.

Useful links

If you would like more information on the topics raised in this Report, you may find the links below helpful.

-  <https://advancedsymbolics.com>
-  <https://www.ee-awards.com/blog/>
-  <https://www.ee-awards.com/engagement-101/>
-  <https://ee-awards.com/content/ebooks/ebook-the-future-of-work-insights-from-global-engagement-101-influencers/>
-  <https://learning.linkedin.com/resources/workplace-learning-report-2018>
-  <https://the-eea.com/>
-  https://en.wikipedia.org/wiki/Me_Too_movement
-  <https://www.bloomberg.com/news/articles/2019-09-13/nobody-benefits-from-a-u-s-china-trade-war-with-no-end-in-sight>
-  <https://www.bloomberg.com/news/articles/2019-09-09/the-massive-cost-of-not-adapting-to-climate-change>
-  <https://www.wired.com/story/ios-hacks-apple-response/>
-  <https://www.advancedsymbolics.com/wp-content/uploads/2019/06/CIC-Whitepaper.pdf>
-  <https://www.zellis.com/blog/research-one-in-five-employees-has-quit-job-over-poor-payroll-experience/>
-  <https://www.leesmanindex.com/research/>
-  <http://worldcomgroup.com/scarf-framework>
-  <https://brexitfacts.blog.gov.uk/2019/09/12/yellowhammer-factsheet/>
-  <https://worldcomgroup.com/resources/confidence-index>
-  <https://worldcomgroup.com/resources/confidence-index-regional-country>

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