Markus Wiesenberger* and Dejan Verčič

The status quo of the visual turn in public relations practice

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Abstract: While most research in public relations and strategic communication concentrates on textual elements, this contribution shifts the focus to the growing importance of visual elements. The theoretical background is based on visual theory and the concept of strategic mediatization. By using a large-scale quantitative survey among 3,387 European communication professionals, this study is the first empirical evidence of communication professionals' perspectives concerning visual communication. Therefore, the paper empirically demonstrates a visual turn in strategic communication. Although practitioners have been using visual elements since the very beginnings of their trade, only a minority guide these activities through a sound management process. This calls for a deeper consideration of visual communication management in practice and visual public relations research in academia.

Keywords: comparative research, quantitative survey, strategic mediatization, visual communication management, visual public relations

1 Introduction

In the last two decades, increasing mediatization has been transforming our everyday lives, organizations, societies, and global society as a whole (Couldry and Hepp, 2017; Hepp and Krotz, 2014). In this “media age” (Hepp and Krotz, 2014), visual communication, in particular, as one of the three main types of communication alongside verbal and nonverbal communication, has become an unequivocal component of the realm of academia and for practitioners that work in the field of communication (Fahmy, Bock, and Wanta, 2014, pp. 1–5). If one thinks of cave paintings and other visual representations firstly produced by Neanderthals and later in the modern age, visual communication can be seen as

***Corresponding author: Markus Wiesenberger**, Institute of Communication and Media Studies, Leipzig University, Germany, E-Mail: markus.wiesenberger@uni-leipzig.de.

Dejan Verčič, Department of Communication, University of Ljubljana, Slovenia, E-Mail: dejan.vercic@fdv.uni-lj.si.

an ancestor of written communication (Hoffmann et al., 2018). Beyond human communication, organizational communication has been using visuals purposefully, especially to fulfill its mission – key element of public relations and strategic communication (de Bussy, 2013; Goransson and Fagerholm, 2018; Hallahan, Holtzhausen, van Ruler, and Verčič, 2007; Zeff, Verčič, Nothhaft, and Werder, 2018). In the organizational context, visuals can be used for various strategic purposes, for instance, internally (e.g., stimulating organizational culture and identity) or externally (e.g., in product or brand advertising as well as public relations). This covers a whole range of visual representations such as space design, signs and symbols like logos, (moving) images – particularly photographic images or animated images like videos –, business clothes, and more (Johnson and Carneiro, 2014; Orgad, 2013).

Recently, there has been a growing number of publications concerning the visual aspects of public relations and strategic communication that explicitly call for attention to, and research into, “the spatial, visual and performative dimensions of the field” (Collister and Roberts-Bowman, 2018a, p. 1; Goransson and Fagerholm, 2016; see also Goransson and Fagerholm, 2018; Thelander, 2018). Even in 1994, Mitchell called for a “pictorial turn” in social sciences that recognized the growing influence of visual elements in and for society. Exactly the same year, Berners-Lee founded the World Wide Web Consortium (W3C) at the Massachusetts Institute of Technology, and made the web public without any patents (Berners-Lee, 1999). These growing digital technologies, platforms, media, etc. have been affecting media culture. Hence, visual elements have become a predominant part of our daily lives, especially through universal internet and social media access at any time because of mobile devices like smartphones and other wearable technologies (Adami and Jewitt, 2016; Couldry and Hepp, 2017; Fahmy et al., 2014). This is one of the reasons why Machin (2014) concludes that we are living in a “visual society” that includes an array of artefacts and communicative activities in visual communication. According to the Cisco Visual Networking Index (VNI) forecast, IP video traffic will be 82 % of all IP traffic globally (both business and consumer) by 2021, up from 73 % in 2016 (Cisco, 2017). Photo- and video-based messaging platforms like Snapchat or Instagram reported more than 53 billion posts and snaps daily in 2018 (Aslam, 2018a, 2018b). This is also reflected in academia, where visual studies in the field of communication have been increasing in the last decade (Hansen and Machin, 2013).

Public relations and strategic communication have always used visualization for their agents’ purpose(s) to create a specific meaning that supports their agents’ goals. Thus, it is even more surprising that public relations scholars have just recently discovered this important and growing field. Goransson and Fagerholm (2016, 2018) summarize in their literature review how visual approaches

were applied in strategic communication research between 2005 and 2015. They conclude that even though visual studies in communication research are increasing in general, public relations and strategic communication researchers have only “slightly emerged” in the same period (Goransson and Fagerholm, 2018, p. 58). Moreover, Collister and Roberts-Bowman (2018b) recently published an edited volume about visual public relations with theoretical concepts and different case studies. They summed up that further research in the “domain extending beyond text will require a better understanding what this means for professional practice in terms of skills and behaviors necessary for this twenty-first century discipline” (p. 196).

From an empirical point of view, the study of visual communication traditionally includes “different visual objects as well as their consumption and production”, and it covers “material objects as well as acts of seeing, perception, and production” (Thelander, 2018, p. 1722). Most empirical research into visual communication is based in linguistics, semiotics, and cultural studies, primarily focusing on the consumption, perception, and recipients’ co-creation of meaning (Catellani, 2011, 2018; Fahmy et al., 2014; Geimer, 2011; Hall, 1997; Hall, Hobson, Lowe, and Willis, 2005; Teruggi Page, 2015; Watts, 2004), the latter being a perspective and area mostly neglected in public relations and strategic communication research (Holtzhausen and Zerfass, 2015, p. 11; Kohrs, 2018, pp. 14–15). However, as Goransson and Fagerholm (2018, pp. 54–56) demonstrate, the production side has been highly neglected and research primarily focuses on visual journalism (photojournalism, citizen journalism, blogger) and mass communication in general (Fahmy et al., 2014, pp. 29–41). Public relations academics concentrate mostly on visual artefacts like websites (Carneiro and Johnson, 2015; Verser and Wicks, 2006), or they study the “effects of campaigning planning” mostly by using “content analysis, image analysis, and ... mixed methods often including experiments” (Goransson and Fagerholm, 2018, p. 56). In accordance with the results of the systematic literature review conducted by Goransson and Fagerholm (2016, 2018), there is a large research gap between visual strategy and public relations, in what the authors call “visual strategic communication”. This gap specifically touches on the preconditions and structures of visual strategies in organizations (visual communication management), the visual operational capacities and activities as well as the visual competencies of communication professionals.

The present study aims to close the research gap by providing new empirical evidence relating to the status of visual strategic communication in Europe and discuss the results in light of the concept of strategic mediatization (Zerfass, Verčič, and Wiesenber, 2016).

2 Literature review

Emergence of visual strategic communication and strategic mediatization

Visual research in general can be seen as an interdisciplinary project. However, from a communication research perspective, Barnhurst, Vari, and Rodríguez (2004) classify visual research in three different approaches. The first covers rhetorical approaches (visual rhetoric) that mainly focus on mass media, everyday life, and popular culture with an emphasis on the intention of the producers of visual artefacts as well as the meaning-making process of recipients and audiences. The second focuses on semantic approaches on a macro level and with a more critical perspective of cultural studies; this one is also labelled visual studies. The third one is a more pragmatic approach focusing on the creation, presentation, and support of media works and visual messages as well as effects on audiences, but also on the meaning of visuals in contemporary society; this one is called the visual communication approach (Martin, 2011; Müller, 2007). Recently, this threefold division has been extended by Goransson and Fagerholm (2016, 2018) with a fourth approach they label “visual strategy”. This approach is derived from their literature review in the area of public relations and strategic communication and “has an emphasis on the strategies of an organization, rather than on the rhetoric, the culture or the message itself” (2018, p. 57). Articles cover the organization’s visual strategies, such as “symbols, identities and visual elements that are part of the strategic communication with the intent to support the organization’s goal” (Goransson and Fagerholm, 2018, p. 57).

Having said this, Goransson and Fagerholm (2016, 2018) shift the focus from mass media and journalism to organizations and their strategic communication; a perspective rarely taken into consideration by academics in the area of communication studies in general and visual communication studies in particular. However, they point out that the visual strategy approach overlaps with all other approaches. This is why scholars call for integration as well as interdisciplinary exchange. For instance, both visual strategy and visual rhetoric focus on a specific outcome, be it persuasion of an audience or the organization’s goal(s). The same applies for visual studies as well as visual communication and visual strategy. Whilst the former specifically takes into consideration the macro perspective, and therefore the environment an organization is embedded in, the latter provides an understanding of the production, presentation, and support of media works.

The need for the shift of focus proposed by Goransson and Fagerholm (2016, 2018) is influenced by the development of concepts of strategic communication, on the one hand (Hallahan et al., 2007, Zerfass et al., 2018), and mediatization, on the other (cf. Hjarvard, 2008). This has resulted in a notion of strategic mediati-

zation described as “first the blurring of lines between advertising and editorial content of the media and secondly the media housing of corporations. This media housing involves the production of media content by organisations themselves instead of by traditional media companies” (Tench, Verčič, Zerfass, Moreno, and Verhoeven, 2017, p. 32). It is quite possible that strategic mediatization enhances visualization of corporate communication in a process in which all communicative aspects of humans and organizations are instrumentalized. This process goes over and beyond the notion of integrated (marketing) communication in which all messages and tools are to be synchronized more or less mechanically, that is, in an interdisciplinary way (designers work with copy writers, etc.). It could be said that integrated communication is a physical process of complementing different communication disciplines, while strategic visual communication management is a chemical process devised to produce a different quality of results.

Taking into consideration the increasing importance of visual elements in society, the first research question in this study addresses the importance of visual stimuli for strategic communication in general and for organizations as well as their stakeholders:

RQ1: How do communication practitioners perceive the importance of visual (non-verbal) stimuli in strategic communication?

The fact that we live in a “visual society” (Machin, 2014) has been intensely debated under the term “mediatization”; a perspective that emphasizes not only that “the social world is something *constructed* by us humans, but that these processes of construction can only be understood ... with ... the increasing social relevance of technologies of mediated communication” (Couldry and Hepp, 2017, p. 16). Mediatization as a concept tries to explain the interrelation between this increasingly mediated communication, on the one hand, and culture and society, on the other. The fact that an individual’s life is highly influenced and dominated by mediated communication is twofold. On the one hand, a *quantitative perspective* evolves with the social, spatial, and temporal spreading of technologically-based media of communication. On the other hand, the *qualitative aspect* emphasizes the structure and materialization of the media and how they influence and change the way we communicate (Couldry and Hepp, 2017, p. 16). Thus, not only individuals change their habits and the ways in which they communicate daily, but so do organizations. This perspective has been emphasized recently by Zerfass et al. (2016) with the concept of “strategic mediatization”. The scholars highlight that the traditional communication disciplines in organizations have been blurred and even “the difference between what is private and what is public, what is happening to the public sphere, and in that context, what public rela-

tions is and what it could be like in fuzzy public/private spaces” is more open to question than ever before (p. 502). They argue that organizations have become some kind of media outlets with their communication functions. Strategic medi- atization thus calls for content management that is linked to overall strategies and focuses on the constant co-construction of meaning throughout an organi- zation’s different channels and instruments. They demonstrate that an organi- zation’s own (in-house) media, in particular, are becoming ever more important for shaping public opinion. However, the researchers refer to media content in general and neither take into consideration the increasing importance of visual elements nor their (in-house or external) production.

The investigation and gathering of specific visual production contexts is part of the visual communication approach. However, taking into consideration organizations and their media production in general, this domain covers the visual strategy approach as well. Considering the different strata pointed out by Panofsky (1991), Müller and Geise (2015, pp. 25–29) differentiate between seven ideal types of production contexts (artistic, commercial, journalistic, scientific, political, private, religious) and nine production forms (architecture, sculpture, painting, graphic, photography, movie, TV, video, internet). The scholars point out that architecture, sculpture, and painting predominantly originate in artis- tic production contexts, while graphic, photography, TV, video and the internet emerge primarily in journalistic production contexts, even though they can also emerge in artistic, scientific, private, and political production contexts (p. 28). As example of commercial production contexts, the authors mention ads in political campaigns (Müller and Geise, 2015, see also Fahmy et al., 2014). Thus, it is time to add empirical evidence into this intersection between organizational commu- nication and its visual production contexts along the line of the production forms appropriate for the organizational context as well as the visual strategy approach. This raises the following research question:

RQ2: How do communication professionals rate the relevance of different visual stimuli for strategic communication, and have their departments/agencies the in-house capacities to produce these elements a) in general and b) specifically based on their gender, age, and specific working area as well as their organization?

Visual competencies of communication professionals

From a strategic communication perspective, the communicator and therefore the communication professional has traditionally been in the spotlight of public relations and strategic communication research. One aspect in this research area covers specific competencies (Gregory, 2008; Tench and Moreno, 2015). However,

as Goransson and Fagerholm (2016, 2018) point out, there is no research in the specific area of visual communication competencies.

For Müller (2008), visual competence covers four different but intertwined dimensions: visual production, visual perception, visual interpretation, and visual reception competence. In public relations, the visual production competence on the individual level is largely neglected: “The study of visual production competence implies that diverse production contexts follow different visual production logics. For example, the production of an artwork happens under different conditions from the production of a news magazine. While for the artist – ideally – her or his individual production skill, experience, as well as the individual expectations towards the artwork count; for a press photographer, professional skills are only one element. ... Researching visual production competence entails investigating the particularities as well as the different types of visual production contexts” (Müller, 2008, p. 103). Therefore, the third research question states:

RQ3: How do communication professionals rate their personal visual communication skills a) in general and b) specifically based on their gender, age, and type of organization they work in?

Visual communication management

Like any other communication activity, visual communication might be more successful and sustainable if it is based on a sound *management process* (Dhanesh, 2018; Jin, Austin, Guidry, and Parrish, 2017). Taking into consideration the visual strategy approach and, more precisely, strategic visual communication, this refers directly to all kinds of visual communication of strategic significance. Hence, “strategic communication management is the attempt to *manage* the communication of strategic significance with regard to a focal entity” (Zerfass et al., 2018, p. 497). Therefore, *strategic visual communication management* (SVCM) can be understood along the same line. It deals with visual communication activities and therefore visual elements and resources “which are of substantial relevance for the focal entity, e. g., an organization” (p. 497). This might be the corporate identity, a new logo, or new designs.

As already introduced with the concept of strategic mediatization, it needs a specific technical infrastructure to manage visual communication and media (Zerfass et al., 2016). Moreover, to manage visual communication it needs regulative and normative guidelines as well as specific internal and external business processes (for internal or external productions and collaborations). Ideally, organizations should implement routines to monitor and measure the effects of their visual communication (Alessandri, 2013; Stacks, 2017; Watson, 2012).

A question about the management of visual communication has rarely been raised, as the literature review by Goransson and Fagerholm (2016, 2018) demonstrates. However, one Austrian scholar wrote his PhD thesis about visual corporate communication (see Berzler, 2009, 2016). He points out that visual corporate communication includes the strategic usage of all visual elements which a corporation controls and uses to fulfill the organization's goals and purposes and to create a unique visual identity. Therefore, it needs specific management routines to obtain, evaluate, and perhaps change the organization's visual orientation (the corporate brand identity). This offers specific strategic potential for a corporation to build and obtain a unique visual identity that sets it apart from the competition and to raise visual attention (Berzler, 2016, p. 11). He points out that besides standard corporate design guidelines, today's corporations need advanced corporate design guidelines (e. g., for movies, animations, space design, or architecture) if produced in-house, or specific outsourcing processes if outsourced. Moreover, the legal and the technical side need further consideration. Finally, it needs specific measurement routines for visual communication such as eye-tracking or video analysis (Alessandri, 2013, 2014). Because no empirical data in the area of visual communication management exist, the final research question will be:

RQ4: To what extent do different kinds of organizations manage their visual elements?

3 Method

The literature review reveals that there is a need for empirical evidence of how public relations and strategic communication practitioners perceive the visual turn in which we live. Moreover, there are no empirical data concerning either the production or management side of visual communication in the context of public relations and strategic communication. To close these research gaps, a quantitative survey was used to gain a first insight into the area of visual strategic communication. This was conducted as part of the annual European Communication Monitor in 2017 (Zerfass, Moreno, Tench, Verčič, and Verhoeven, 2017). The special section on visualization addressed the following issues: First, the practitioners were asked to rate different statements (on a five-point Likert scale ranging from strongly disagree to strongly agree) regarding the importance of visual elements for strategic communication in general, the perceived demand of their stakeholders regarding visual communication, their own organization and its usage of visual elements, and the requirement of specific competencies as

well as management structures and processes. Secondly, respondents were asked whether different visual elements have become more or less important for strategic communication in their organization than three years ago (on a five-point Likert scale ranging from less important to more important). The items derived from the production forms differentiated by Müller and Geise (2015) and have been operationalized by using traditional and common examples for every form. The professionals were also asked if their organization had human and technical capacities for production. Thirdly, the professionals were asked to rate their personal competencies in the different forms of visual production (five-point Likert scale ranging from no experience at all to very high-level experience). Finally, an item battery asked how their organizations manage their visual communication and whether they had implemented different standards, routines, and processes. In this study, questions about technical skills on visual elements were used as indicators for visual competencies in general. Further research is needed to assess depths of visual competencies, for instance, knowledge of peculiarities and features of the image as medium, knowledge of the effects of images and individual image elements.

A pre-test was administered with 46 communication professionals in 20 European countries. During a period of five weeks in March and April 2017, a personal invitation was sent to communication professionals throughout Europe based on the largest data base of European communication professionals provided by the European Association of Communication Directors (EACD). In addition, regional and national professional associations were asked to invite respondents. In total, 9,895 respondents started the survey, and 3,496 of them completed it. The data for the final evaluation is based on 3,387 respondents who worked in the area of communication. Of those respondents, 59.6 % were female ($n = 2,019$) and 40.4 % male ($n = 1,368$). The majority of the respondents had more than 10 years of experience (63.6 %, $n = 2,155$), followed by a group with 6 to 10 years of experience (20.2 %, $n = 685$) and a group with less than five years of experience (16.1 %, $n = 547$). The professionals who were interviewed worked in either the communication departments of listed companies (22.4 %, $n = 758$) or private companies (22.6 %, $n = 765$), governmental (15.8 %, $n = 535$) or non-profit organizations (13.2 %, $n = 446$). The largest group worked for communication consultancies, public-relations agencies or as freelancers (26.1 %, $n = 883$). The respondents were based in 50 European countries. The results have been statistically tested with Pearson's chi-square tests (χ^2), Cramér's V, independent sample T-tests as well as F-tests in one-way ANOVA and Pearson correlation (r).

4 Findings

The results of this study confirm the ongoing trend towards visual communication, and communication professionals in Europe reaffirm that this trend will be even more important for strategic communication in the future. The growing importance goes hand in hand with a perception that stakeholders' visual demand is growing that the organizations themselves are building up visual equipment. Even though the practitioners state that this visual trend requires more competencies, every second professional lacks basic visual competencies. Online videos and infographics have significantly grown in importance, while space design, architecture and art are losing slightly. However, the study revealed a lack of clarity and agreement on how to manage these activities.

Importance of visual stimuli in strategic communication (RQ1)

The growing importance of visual elements in communication is confirmed by 94.4 % ($n = 3,196$) of the sample (agreement based on scale points 4–5), based on the general statement that “visual elements will be more important for strategic communication in the future” ($M = 4.38$, $SD = .677$). However, comparing the importance regarding non-verbal communication (appearance, architecture) with other specific methods of addressing stakeholders, gatekeepers, and audiences, puts this into a better perspective (see Table 1).

Relevance of visual stimuli for public relations from the organization's perspective (RQ2)

The communication professionals interviewed do not only report a growing importance of visuals for strategic communication in general, they also perceive a higher demand for visual communication from their stakeholders (69.0 %, $n = 2,336$ agree that their stakeholders are demanding more visual communication compared to three years ago). On the other hand, the organizations tend to use more visual elements in their communication compared to three years ago – a tendency mainly observed by communication professionals working in non-profit organizations (see Table II).

Table 1: Methods in addressing stakeholders, gatekeepers and audiences.

	Press and media relations with print newspapers/ magazines		Press and media relations with online newspapers/ magazines		Press and media relations with TV and radio stations		Corporate publishing/ owned media (customer/ employee magazines)		Online communication via websites, e-mail, intranets		Social media and social networks (e.g., Blogs, Twitter, Facebook)		Mobile communication (phone/ tablet apps, mobile web-sites)		Face-to-face communication		Non-verbal communication (appearance, architecture)	
	M	(SD)	M	(SD)	M	(SD)	M	(SD)	M	(SD)	M	(SD)	M	(SD)	M	(SD)	M	(SD)
Importance today (2017)	3.63	(1.09)	4.20	(.82)	3.70	(1.05)	3.28	(1.07)	4.24	(.80)	4.44	(.73)	4.17	(.88)	4.14	(.88)	3.28	(.99)
Importance in three years (2020)	3.05	(1.19)	4.20	(.94)	3.50	(1.11)	3.24	(1.22)	4.31	(.88)	4.61	(.65)	4.58	(.70)	4.10	(.97)	3.38	(1.10)

Notes: n ≥ 3,239 communication professionals in Europe. How important are the following methods in addressing stakeholders, gatekeepers, and audiences today?
In your opinion, how important will they be in three years? Scale 1 (Not important) to 5 (Very important).

Table II: Importance for organizations.

	General	Joint stock companies	Private companies	Governmental organizations	Non-profit organizations	Consultancies & agencies
	M (SD)	M (SD)	M (SD)	M (SD)	M (SD)	M (SD)
Our stakeholders demand more visual communication compared to three years ago	3.82 (.83)	3.81 (.81)	3.82 (.83)	3.77 (.85)	3.86 (.83)	3.84 (.84)
My organization uses more visual elements in its communication compared to three years ago **	4.20 (.82)	4.23 (.81)	4.20 (.80)	4.20 (.82)	4.39 (.74)	4.09 (.85)
N	3,387	758	765	535	446	883

Notes: n = 3,387 communication professionals in Europe. Scale ranges from 1 (strongly disagree) to 5 (strongly agree). ** There was a significant effect regarding the perceived usage of more visual elements on the types of organizations at the $p < .01$ level [$F(4,3382) = 11.00, p = .00$].

However, which specific visual elements had become more important compared to three years before? As Table III demonstrates, especially online videos and infographics gained importance between 2014 and 2017. However, other more professional visual elements like art, space design, or professional photos or movies seem to be less relevant for the profession. More than half of the professionals stated that their organization had personal and technical capacities to produce online videos, info- or business graphics, and signs and symbols. 47.7 % claimed that their organization could produce professional photos, while only 34.6 % stated that their organization was equipped to produce online animations.

Table III: Visual elements and their importance for organizations.

	More important (scale 4–5)	Neutral (scale 3)	Less important (scale 1–2)	M (SD)	In-house production
Online videos (e. g., web clips)	87.9 %	9.6 %	2.5 %	4.37 (.78)	54.3 %
Infographics (e. g., explanatory content)	83.0 %	14.1 %	2.9 %	4.23 (.81)	58.2 %
Instant photos (spontaneous, unedited)	69.1 %	22.5 %	8.4 %	3.88 (.96)	79.0 %
Business graphics (e. g., tables, figures)	61.9 %	30.1 %	8.0 %	3.75 (.91)	66.8 %
Signs and symbols (e. g., logos, icons, pictograms)	59.6 %	31.9 %	8.5 %	3.70 (.91)	53.4 %
Online animations (e. g., flash, web banners)	58.4 %	26.8 %	14.8 %	3.63 (1.06)	34.6 %
Professional photos (pre-arranged/edited, stock)	57.2 %	29.2 %	13.6 %	3.64 (1.05)	47.7 %
Professional movies (e. g., image films, commercials)	55.9 %	30.9 %	13.2 %	3.62 (1.03)	21.4 %
Space design (for events and rooms)	46.4 %	41.6 %	12.0 %	3.45 (.90)	29.9 %
Art (e. g., paintings, abstract photos)	18.8 %	43.2 %	38.0 %	2.72 (1.03)	14.2 %

Notes: n = 3,387 communication professionals in Europe. Q: Please rate the relative importance of the following elements for the communication activities of your organization compared with three years ago. Scale ranges from 1 (less important) to 5 (more important). Does your organization have the personal and technical capacities to produce these elements?

There are strong differences between the types of organizations and their personal and technical capacities to produce these elements (see Table IV). Professionals working for joint stock organizations report especially low visual in-house capacities because they seem to collaborate much more with external agencies.

Table IV: Personal and technical capacities to produce visual elements.

	Joint stock companies	Private com- panies	Governmental organizations	Non-profit organizations	Consultancies & agencies	χ^2	φ
Instant photos (spontaneous, unedited)	76.1 %	77.0 %	86.7 %	83.0 %	76.6 %	32.31	.098
Business graphics (e. g., tables, figures)	65.0 %	70.5 %	64.5 %	58.7 %	70.4 %	25.28	.086
Infographics (e. g., explanatory content)	49.3 %	62.7 %	55.7 %	51.6 %	66.8 %	67.35	.141
Online videos (e. g., web clips)	50.3 %	53.5 %	61.7 %	54.3 %	54.0 %	16.97	.071
Signs and symbols (e. g., logos, icons, pictograms)	51.5 %	57.4 %	52.0 %	44.6 %	57.0 %	24.82	.086
Professional photos (pre-arranged/ edited, stock)	40.5 %	50.5 %	51.8 %	44.2 %	50.7 %	27.13	.089
Online animations (e. g., flash, web banners)	32.7 %	40.3 %	30.3 %	24.7 %	39.0 %	43.30	.113
Space design (for events and rooms)	27.6 %	34.0 %	28.2 %	25.3 %	31.6 %	14.42	.065
Professional movies (e. g., image films, commercials)	20.1 %	21.6 %	21.3 %	16.4 %	25.0 %	14.46	.065
Art (e. g., paintings, abstract photos)	9.8 %	17.5 %	12.1 %	10.3 %	18.3 %	38.99	.107
n	758	765	535	446	883		

Notes: n = 3,387 communication professionals in Europe. Q: Does your organization have the personal and technical capacities to produce these elements? Highly significant differences between the types of organizations, χ^2 (4, N = 3,387), $p < .01$.

In particular, practitioners working in governmental organizations report greater capacities, for example, in the areas of instant and professional photos as well as online videos. Private companies and agencies have the highest percentage of visual in-house capacities in the areas of business and infographics, signs, and symbols as well as online animations, space design, and art.

Visual communication skills of communication professionals (RQ3)

When asking the communication professionals if visual communication required specific competencies, the majority agreed (89.5 %, n = 3,033; M = 4.31, SD = .753). However, as Table V clearly demonstrates, most of them have only little experience in most fields of visual communication.

Table V: Personal competencies to produce visual elements.

	High-level experience (scale 4–5)	Medium-level experience (scale 3)	Low-level experience (scale 1–2)	M (SD)
Taking instant photos	63.4 %	22.5 %	14.1 %	3.69 (1.13)
Creating business graphics	27.6 %	26.6 %	45.8 %	2.65 (1.25)
Taking professional photos	27.4 %	24.2 %	48.4 %	2.62 (1.26)
Shooting online videos	27.3 %	24.1 %	48.7 %	2.59 (1.28)
Creating infographics	26.1 %	24.7 %	49.3 %	2.57 (1.25)
Editing signs and symbols	21.7 %	23.3 %	55.0 %	2.42 (1.25)
Shooting professional movies	14.9 %	14.8 %	70.3 %	2.00 (1.21)
Generating online animations	9.9 %	14.0 %	76.2 %	1.84 (1.08)
Designing space (room setup, 3D-design)	9.3 %	14.7 %	76.0 %	1.83 (1.06)

Notes: n = 3,387 communication professionals in Europe. Q: How would you rate your personal competencies in the following areas? Scale ranges from 1 (no experience at all) to 5 (very high-level experience).

Taking into account all nine skills described above, a general mean value of all competencies can be calculated, and each communication professional can be extrapolated. The general mean value of all competencies is 2.47. Therefore, all communication professionals with a lower total mean value can be seen as communication professionals with low visual communication skills. Hence, 53.3 % of the whole sample are in this category. In contrast, only 12.1 % have a total mean value above 3.50.

Communication professionals working in private companies and non-profit organizations have more visual competence than their peers working for joint stock companies, governmental organizations, or in agencies (see Table VI).

Table VI: Personal skills to produce visual elements in types of organizations.

	Joint stock companies	Private companies	Govern- mental organiza- tions	Non-profit organiza- tions	Consul- tancies & agencies	F (4,3382)
Taking instant photos	3.63	3.76	3.67	3.95	3.54	10.88
Creating business graphics	2.65	2.82	2.39	2.60	2.70	9.82
Taking professional photos	2.56	2.74	2.58	2.73	2.55	3.71
Shooting online videos	2.62	2.68	2.47	2.70	2.49	4.54
Creating infographics	2.51	2.68	2.36	2.57	2.66	6.93
Editing signs and symbols	2.34	2.62	2.25	2.45	2.39	8.32
Shooting profes- sional movies	2.14	2.13	1.81	1.95	1.92	9.15
Generating online animations	1.90	1.95	1.60	1.77	1.86	9.88
Designing space	1.88	1.91	1.69	1.84	1.81	3.75
Total skills mean	2.47	2.59	2.31	2.51	2.43	8.94
n	758	765	535	446	883	

Notes: n = 3,387 communication professionals in Europe. Q: How would you rate your personal skills in the following areas? Scale ranges from 1 (no experience at all) to 5 (very high-level experience). There was a significant effect regarding the self-evaluation on the types of organizations at the $p < .01$ level.

There are also significant differences between male and female practitioners regarding the self-evaluation of their visual competencies (see Table VII). Male professionals rate themselves better than their female peers at taking professional photos, shooting online or professional videos, creating business or infographics, editing signs and symbols, or in designing space. Female practitioners claim to be more experienced only in taking instant photos.

Table VII: Comparison between professionals of personal ability to produce visual elements.

	Female (M/SD)	Male (M/SD)	t(3,385)
Taking instant photos	3.73 (1.11)	3.62 (1.15)	2.87
Creating business graphics	2.57 (1.24)	2.77 (1.25)	4.71
Taking professional photos	2.55 (1.25)	2.73 (1.27)	4.25
Shooting online videos	2.47 (1.25)	2.75 (1.30)	6.27
Creating infographics	2.49 (1.23)	2.70 (1.26)	4.78
Editing signs and symbols	2.35 (1.25)	2.52 (1.25)	3.78
Shooting professional movies	1.87 (1.16)	2.20 (1.26)	7.68
Generating online animations	1.74 (1.03)	1.97 (1.15)	6.15
Designing space	1.78 (1.04)	1.91 (1.09)	3.39
Total skills mean	2.40 (.811)	2.57 (.878)	6.09
n	2,019	1,368	

Notes: n = 3,387 communication professionals in Europe. Q: How would you rate your personal skills in the following areas? Scale ranges from 1 (no experience at all) to 5 (very high-level experience). All items are highly significant differences at the $p < .01$ level.

Finally, there are significant correlations between age and different visual competencies. Younger professionals claim to have a lot of experience in creating business or infographics ($r = .046$ and $r = .065$, $p < .01$). The same is true for taking professional or instant photos ($r = .040$ and $t = .041$, $p < .05$) as well as shooting online videos ($r = .073$, $p < 0.01$). That younger professionals feel more comfortable with all kinds of visual elements is demonstrated by the difference between the total skills means: Professionals of 29 years or younger reach 2.56, between 30 and 39-year-olds reach 2.51, between 40 and 49-year-olds reach 2.48, between 50 and 59-year-olds reach 2.35, and 60-year-olds or older reach 2.34 ($r = .091$, $p < .01$).

Visual communication management (RQ4)

Most of the communication professionals report that their organizations have standard corporate design guidelines (80.1%, n = 2,670) and specific routines for outsourcing processes (72.3%, n = 2,410). However, most of these have no advanced corporate design guidelines (36.7%, n = 1,222), and even fewer have implemented measurement routines for visual communication (17.0%, n = 568). Only 4.6% of the sample (n = 154) report that their organizations have implemented all management routines (see Table VIII).

Table VIII: Management routines for visual communication.

We have implemented ...	Joint stock companies	Private companies	Governmental organizations	Non-profit organizations	Consultancies & agencies	Total	χ^2	ϕ
Standard corporate design guidelines	87.9 %	80.5 %	82.1 %	84.8 %	69.3 %	80.1 %	105.92	.177
Outsourcing processes	79.5 %	68.4 %	64.3 %	70.2 %	75.4 %	72.3 %	46.93	.118
Technical infrastructures	58.9 %	54.5 %	51.1 %	45.7 %	45.6 %	51.5 %	40.23	.109
Legal management routines	58.2 %	44.4 %	41.3 %	37.3 %	40.4 %	45.1 %	77.74	.152
Business processes	49.3 %	44.6 %	31.9 %	31.6 %	42.6 %	41.4 %	60.83	.134
Advanced corporate design guidelines	55.5 %	38.1 %	27.2 %	26.1 %	30.2 %	36.7 %	176.14	.128
Measurement routines for visual communication	20.1 %	18.3 %	10.5 %	14.3 %	18.7 %	17.0 %	26.01	.088
None of these	1.6 %	3.3 %	5.1 %	4.1 %	4.1 %	3.5 %	13.25	.063
n	758	765	535	446	883	3,387		

Notes: N = 3,387 communication professionals in Europe. Q: How does your organization manage visual communication? Please tick all items that apply for your communication department or agency. Highly significant differences between the types of organizations, χ^2 (4, N = 3,387), $p < .01$.

5 Discussion

This study clearly demonstrates that public relations practitioners in Europe see visual communication as an increasingly important component of their work and the (internal and external) communication strategy of their client's organizations. This is driven by technology which is enabling easier use of visuals in digital environments but also by stakeholder's expectations. However, not all types of organizations use visuals equally: Non-profit organizations show more responsiveness to technological opportunities and stakeholder demands, while agencies, interestingly, seem to be the most conservative, although they report more in-house visual competencies than NGOs, governments or joint stock companies. Nevertheless, the low capacities of visual in-house production especially in joint stock companies and agencies can be explained by the networks of agencies they work with specialized in visual elements (see Table IX). Therefore, these types of organizations have mostly implemented outsourcing processes. This finding leads to the conclusion that joint stock companies alone have not yet become media outlets as is proposed by the concept of strategic mediatization. Nonetheless, the networks of companies and their communication agencies have become a new type of media network that work together for the agent's goals. This explains why recently more and more joint stock companies have founded their own communication agencies or work together with all kinds of different startups. Hence, the concept of strategic mediatization needs to be expanded not only to describe new processes and structures in an organization but also its network, that is, its communicative eco-system. However, the documented progress of visualization of organizational communication in Europe raises questions of its societal effects: It is quite clear that organizations strategically mediatize and visualize to increase their impacts on the targeted stakeholders, but societal consequences of the process are still largely unexplored.

Moreover, the study revealed new findings and implications at the level of practitioners. Firstly, there is a significant difference between how important visual competencies are perceived, on the one hand, and how scarce practitioners rate their personal competencies, on the other hand. Here, younger practitioners outperform older ones, and males outperform female practitioners in visual competencies, raising questions regarding future management of visual strategies and their implementations. This is even more striking if we take into account that a large majority of organizations have no management tools in place to guide their visual performance. On the one hand, this requires higher management standards and routines for strategic visual communication management (SVCN) and on the other, means that younger professionals could end up advising and helping older ones regarding visual literacy (Manley and Valin, 2017).

The generally low visual competency of communication professionals leads to necessary questions being asked regarding visual literacy, on the one hand, and Bachelor degrees, on the other hand. Even though the younger generation seems to be better equipped in all areas of new visual media, public relations and communication programs worldwide still overestimate the role of writing courses and underestimate the role of visual communication. The growth of voice control will add to doubts about the focus on writing skills for future communication professionals. Therefore, these results illustrate the need to shift the focus from teaching only writing competencies to teaching all kinds of communication competencies.

These research results also indicate a specific visual divide not only on the individual level of communication professionals in Europe but also on the organizational and the professional level in general. Communication departments with larger budgets are able to buy these specific visual services and try to integrate these in their strategic visual communication. Apart from that, especially communication professionals working in nonprofit organizations are much better equipped and have many more visual competencies but fewer management routines for visual communication. This leads to greater in-house innovation potential in nonprofit organizations, while private companies are in-between. Therefore, for SVCM they need both implemented and advanced management routines for visual communication plus well-equipped communication professionals in the realm of visual communication.

6 Limitations and future perspectives

This study is based on a purposive sample and is not representative for the whole population of communication practitioners in Europe. (The total population of practitioners to sample is unknown.) It was conducted in English, which excluded practitioners without command of the English language. The sample structure also reveals that the more senior positions (heads of in-house communication departments and leaders of public-relations agencies) are overrepresented, which makes it a kind of elite study. Moreover, some European countries such as the United Kingdom ($n = 355$), Germany ($n = 253$), or Belgium ($n = 216$) are vastly overrepresented, while others like Austria ($n = 64$), Portugal ($n = 53$), or Russia ($n = 51$) are highly underrepresented. Nevertheless, there is no evidence of how many communications professionals work in Europe or in any specific country. That is why we do not show comparative data. Considering the topic, the authors believe that these shortcomings do not affect the value of the results because critical perceptions of senior practitioners only highlight the critical results.

What have we learned from this study and where should we go from here? First, there is a serious problem with a significant difference between perceived needs, on the one hand, and lack of personal and organizational competencies in visual communication in public relations and strategic management, on the other. While this research primarily used technical skills for visual communication as proxies for visual competence in general, one can assume that differences are even greater at a conceptual level (although this thesis needs empirical verification). Second, there is an intra-generational divide, with younger practitioners expressing higher levels of competence than their older colleagues, which raises interesting questions regarding management and governance of visual communication processes in contemporary organizations. Will those that perceived themselves as less competent be able to lead those that perceived themselves as more competent, or will we be faced with a situation in which less experienced (younger) practitioners will have to learn to lead more experienced? Or will the very process of (visual) communication management have to go in a more co-creational direction, in which some will lead in some aspects but at the same time be led by others in other aspects of their jobs. There is a whole new world of the contemporary and future public relations waiting for new research.

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