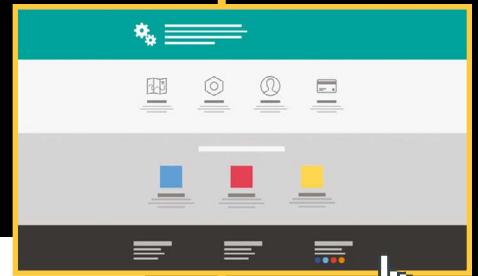


# The Value of Visuals

A Business Case for Visual Communication in the Workplace



# Inside TechSmith's *The Value of Visuals Report*

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# The Transformation of Communication

Thanks to tools like Facebook, Pinterest, Instagram<sup>1</sup> and Snapchat, it's never been easier to create, share and consume visual content. Every day, nearly two billion emojis are shared just on Facebook<sup>2</sup>; two billion GIFs are sent through Giphy<sup>3</sup>, and one billion hours of video are watched on YouTube<sup>4</sup>. The way we consume information and communicate has fundamentally changed.



Wendy Hamilton  
CEO at TechSmith

Businesses have started to adapt customer communications — GIFs into emails and emojis into subject lines, for instance. But how many have considered the impact of these digital communication trends on their most valuable asset: their employees?

We set out to investigate how businesses are adapting to the needs of their workforce, and the potential financial and economic impact of visual employee communications. While we've long understood the benefits of visual communication on engagement and learning, the degree of impact this report revealed was a surprise even to us.

Businesses still primarily communicate, collaborate and consume information in traditional ways. Written documents, plain text emails and phone meetings rule the roost. They haven't evolved enough practices and technologies in visual communication to keep up with the world around them.

Yet using visual communications in the right moments could have a substantial impact on business performance, gaining more than \$1,200 a year in productivity for every employee who consumes information as part of their role. This would unlock \$167 billion in productivity across the six geographies we investigated — an average GDP boost of 0.52%.

The productivity opportunity applies to all workers, because visual communication improves learning and information retention for all workers. However, this is no longer just a missed opportunity, but a growing threat. The workforce is changing to represent more employees who are accustomed to visual communication in their personal lives, so expect it in their professional lives. This new generation of workers may perceive the way that leaders communicate not only as unclear, but also as uninspiring, impacting their motivation levels and engagement.

I hope you find the insights in this report valuable as you address the gap between business inertia and employee expectations.

Signature

A handwritten signature in black ink that reads "Wendy Hamilton".

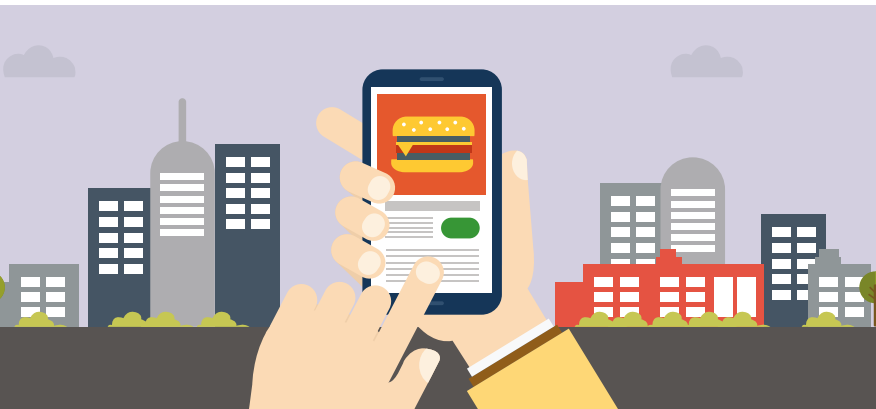
<sup>1</sup> [Instagram](#)

<sup>2</sup> [Facebook](#)

<sup>3</sup> [Fast Company](#)

<sup>4</sup> [YouTube](#)

# The Data You Need To Know



The Value of Visuals: A Business Case for Visual Communication reveals why updating business communications has become a critical imperative.



## The Economic Picture



**\$167 billion**

**\$167 billion** in business productivity could be unlocked every year using visuals such as screenshots, GIFs, screencasts, and videos in workplace communications — and that's just across the six geographies considered in the research.



**0.52%**

It's the equivalent of a potential **0.52%** boost to GDP.



## The Business Story



**Two out of three**

**Two out of three** employees carry out tasks better when communicated with visually vs. non-visually.

Not only that, they absorb the information **7% faster**.



**\$1,200**

If businesses used visual communications effectively, **\$1,200 of productivity** could be unlocked each year for every affected employee.

That's like having seven extra full-time employees a year for a business of **500 workers**.



### The Employee Impact



### The Email Issue

#### Younger workers

**Younger workers** are twice as likely as baby boomers to use images and video to communicate in their own time — and they are two-times more likely to want more visual communications at work.

Nearly half of **younger workers** believe their company is reliant on plain-text email.

And as a result, they are the most likely demographic in the workforce to have been demotivated by poor company communications.

With millennials and **Generation Z** now making up the biggest segment of the workforce and growing, there is a pressing need to adapt business communications to be more visual.

#### Businesses

**Businesses** are twice as likely to be upping their use of email over any other type of communication.

**50% of businesses** are using more emails than even a few years ago.

Employees don't want this focus on text-based information sharing to continue and a third say their motivation levels have been affected by their company's poor communications.



# Untapped Opportunity

A decade-long issue<sup>5</sup>, the productivity puzzle is not becoming any clearer, with very recent data suggesting a further downturn in many of the geographies we studied — including the US<sup>6</sup>, the UK<sup>7</sup>, and Australia<sup>8</sup>. As business leaders struggle to create conditions that foster economic growth, our research shows that using more visual content in employee communications could unlock extra productivity.

Based on robust economic calculations and scientific findings on how the brain processes information, we found that every country studied would experience a significant uplift in productivity through creating engaging, clear, and visual communications for workforces.

In fact, if businesses in the geographies studied used visuals in their workplace communications, it would potentially lead to a GDP boost of \$167 billion or 0.52%. With economic growth currently below 3%<sup>9</sup> in every country we researched, this is a significant figure.

## Potential Visual Communications Economic Boost

Geography	GDP Boost (%)	GDP Boost (\$)
UK	0.59%	\$16.579 billion
Australia	0.55%	\$6.527 billion
Canada	0.55%	\$8.961 billion
US	0.52%	\$97.298 billion
France	0.49%	\$13.583 billion
DACH*	0.48%	\$23.848 billion

\*Germany, Austria, Switzerland

Robert Beauchamp, an economist at Cebr, sees these results as positive news for workers and businesses, representing a relatively easy win: “Conventional solutions to tackling productivity issues, like improving workers’ skills, investing in R&D or focusing on transport infrastructure are all difficult, time-consuming and expensive. There will be some initial cost to implementing effective visual communications, but this is likely to be relatively small, presenting a rare opportunity to boost productivity quickly and easily.”

<sup>5</sup> [OECD](#)

<sup>6</sup> [Labor Department](#)

<sup>7</sup> [ONS](#)

<sup>8</sup> [Australian Industry Group](#)

<sup>9</sup> [World Bank](#)



# Country Focus: The UK

With a dominant services sector, the UK economy has the most to gain from improving visual communications to employees. Since the financial crisis, the UK has experienced weak productivity growth. Visuals could be one way to get back on the right path for the UK.

But the country has one of the biggest shifts to make if it is to adopt better visual ways of communicating.

We found that businesses in the UK are the lowest users of all types of visual tactics we tested for.





# Region Focus: DACH

Second to the US, the DACH region (Germany, Austria, and Switzerland) could experience one of the biggest financial boosts in GDP if businesses used more visual communications. Germany and Austria have manufacturing-focused economies and therefore a smaller proportion of employees who could benefit from using visual communications. Nevertheless, the boost could still be significant since high GDP per hour makes the time saved especially valuable.

The combination of high labor productivity and a large share of communicators in Switzerland makes the potential boost from visual communications particularly significant.

However, the region is falling behind, with just under a quarter (24%) of employees saying they're inspired by the way leaders in their organization communicate — the lowest level of all geographies in our research.

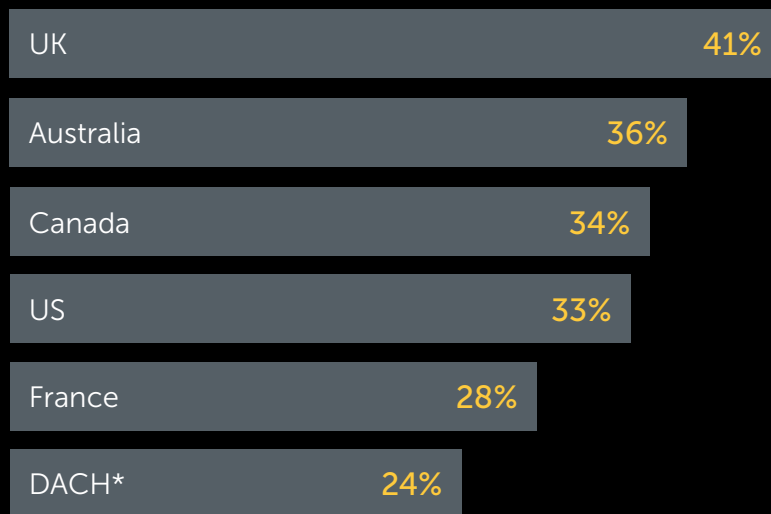
# 24%

of employees say they're  
inspired by the way leaders  
in their organization  
communicate



## PART 1. THE ECONOMIC PICTURE

Ranking of proportion of employees that are inspired by the way leaders in their organization communicate



\*Germany, Austria, Switzerland





## PART 2. THE BUSINESS STORY

# A Piece of the Productivity Puzzle

There is no one solution to the complex issue of business productivity. However, just as professional athletes change numerous tiny details to significantly improve their overall performance, there are a multitude of small adjustments businesses can take to increase their productivity levels.

With employees being critical to this, our research finds that upgrading internal communications could significantly boost engagement and productivity. As part of The Value of Visuals report, we commissioned scientific research to discover how the brain responds to different workplace communications. A leading doctor in behavioral economics monitored office workers on their completion of three everyday office tasks — uploading a post to a website, downloading new software, and filling in an expenses form. For each task, he tested how using visual and non-visual communication methods affected understanding, recall, and speed.

The results showed that 67% of employees perform better when communicated with visually compared to text alone. Not only do they absorb the information better, they also do so 7% faster. Visual content also increases comprehension: using text coupled with visuals instead of text alone increases accuracy by 8%, and using video rather than text increases accuracy by 6%.

For businesses, this means that using visual communications at the right time and in the right way could unlock **6 minutes and 43 seconds** a day for every affected employee. In a 40-hour work week, that is more than half an hour — 33 minutes 36 seconds.



## PART 2. THE BUSINESS STORY

All in all, a visual communications productivity boost could generate more than \$1,200 a year for every employee that uses information regularly as part of their role. For a business of 500, that is equivalent to having **seven extra full-time employees** working.

Dr. Alastair Goode, who conducted the research for TechSmith, thinks that these findings mirror human nature: "Around 60% of the human brain is involved in visual processing, so visuals play a huge role in how we communicate with each other. The research shows that in a business scenario, visuals prompt a deeper level of understanding than non-visual communications — proving humans react to visual stimuli in the same way at work as they do in any other situation."

Recent trends towards more image-based ways of communicating will not only change expectations, but in time people could be even more influenced by visuals, says Dr. Goode: "With our propensity for visualization, it is no surprise that GIFs, emojis, and short videos have become so popular recently. It also means that people are becoming more accustomed to absorbing information visually than ever before."

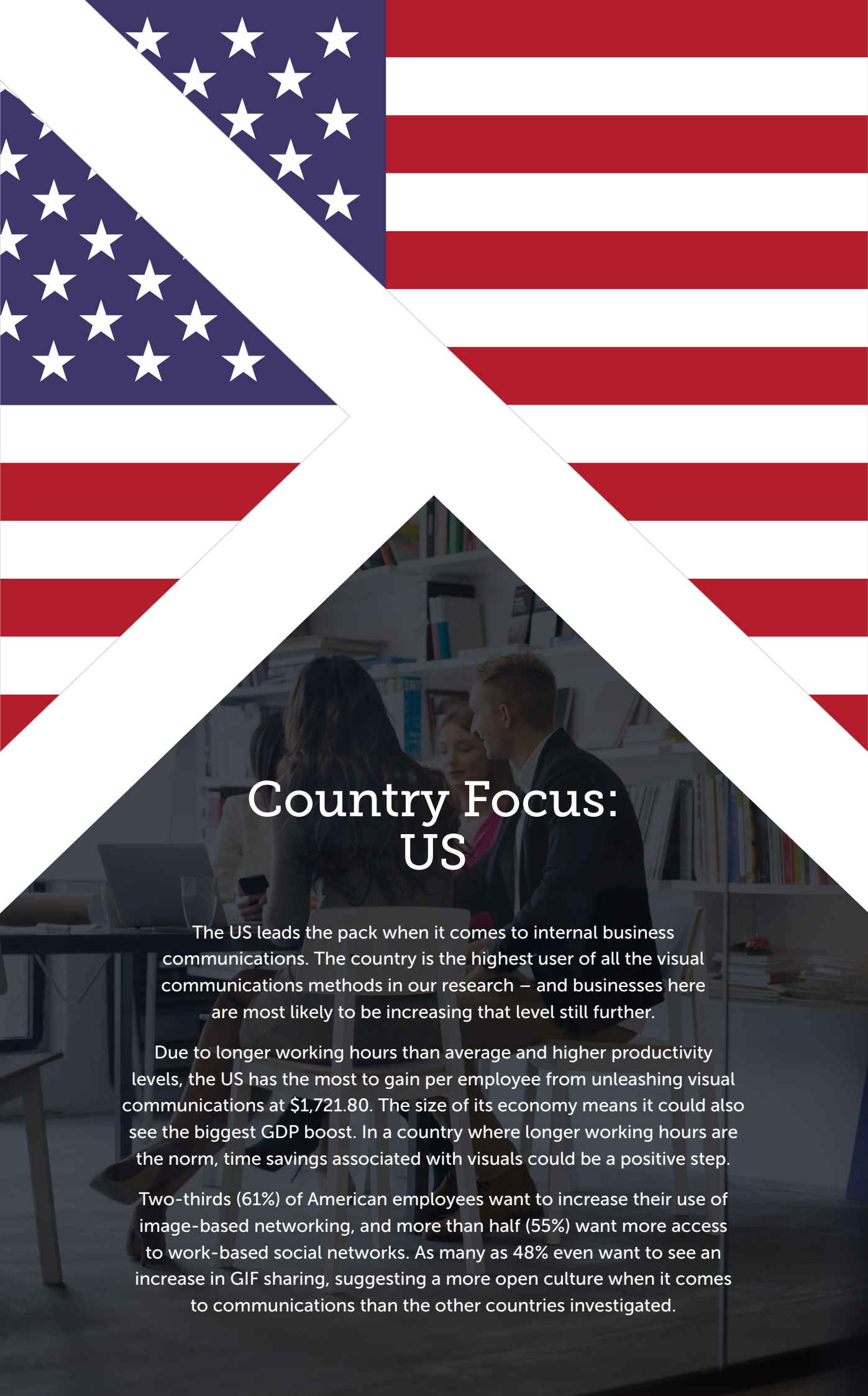
He adds: "Business leaders should be aware that this isn't an issue that is going to go away. As humans, we will always have a more visceral reaction to visuals than text."

### Potential Visual Communications Productivity Boost

Per worker savings based on average annual hours  
and GDP per hour in the geography

US	\$1,721.80
France	\$1,456.44
DACH*	\$1,399.30
Australia	\$1,384.70
Canada	\$1,258.58
UK	\$1,258.56

\*Germany, Austria, Switzerland



## Country Focus: US

The US leads the pack when it comes to internal business communications. The country is the highest user of all the visual communications methods in our research – and businesses here are most likely to be increasing that level still further.

Due to longer working hours than average and higher productivity levels, the US has the most to gain per employee from unleashing visual communications at \$1,721.80. The size of its economy means it could also see the biggest GDP boost. In a country where longer working hours are the norm, time savings associated with visuals could be a positive step.

Two-thirds (61%) of American employees want to increase their use of image-based networking, and more than half (55%) want more access to work-based social networks. As many as 48% even want to see an increase in GIF sharing, suggesting a more open culture when it comes to communications than the other countries investigated.





# Country Focus: France

France has one of the highest productivity levels across these six geographies, and therefore the potential boost arising from visual communications could be particularly valuable given the potential value of the time saved. Added to that, we found French employees are the most likely to believe it is easier to remember information when it has been communicated visually.

But French businesses are behind the pack when it comes to using visual methods to engage with employees. Workers in France are the most likely to want to use more visual communications at work and believe company communications are outdated.

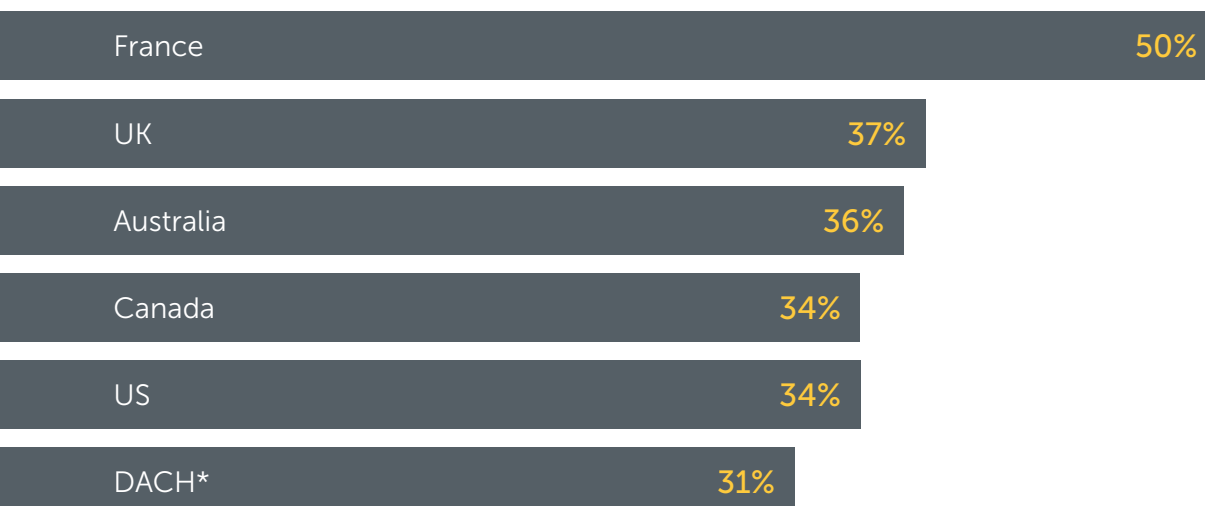
This tension between what workers want and what leaders are doing is affecting performance. Half (50%) of employees go so far as to say they have been actively demotivated by company-wide emails.

## PART 2. THE BUSINESS STORY

### Ranking of proportion of employees that think employee communications are outdated



### Ranking of proportion of employees that have been demotivated by poor company communications



\*Germany, Austria, Switzerland





# Pressure Mounts

It has always made sense to use visuals in the workplace, but recent technological innovations and changes in the way people communicate create an urgent need to embrace new ways of sharing information. It's no longer a nice to have: it's an essential that — if ignored — risks impacting on engagement and performance levels.

Younger workers constantly and confidently communicate with visuals, thinking nothing of sharing videos, GIFs, emojis or photos. But many internal communications are still written by leaders comfortable with plain-text email. Our research shows that this creates tension between businesses and their employees. And the problem will only become more pronounced as young people take over the workplace — with millennials already making up the largest working generation<sup>10</sup>.

We compared the needs and wants of millennials and baby boomers when it comes to office-based communications, and the findings are stark. Millennials are twice as likely to use images and video regularly in their own time. And they told us they are also twice as likely to want to use more visual communications at work.

Businesses are falling short, with 44% of millennials believing their company's communications are outdated, and half (47%) feeling that their company relies on plain-text email. As a result and despite spending fewer years in the workforce, millennials are more likely than baby boomers or Gen X to have been demotivated by unclear or uninspiring company communications.

"The new generation of professionals use visual communication consistently in their personal lives, and they expect it in their professional lives too," says Wendy Hamilton, CEO at TechSmith. "Businesses that fail to invest in more visual ways of communicating internally ultimately will struggle to educate and engage employees." — dangerous at a time when many businesses are struggling to grow. Choosing the right communications options at the right time and for the right audience is as key when it comes to employees as it is for customers."

<sup>10</sup> [Pew Research](#)



## Country Focus: Canada

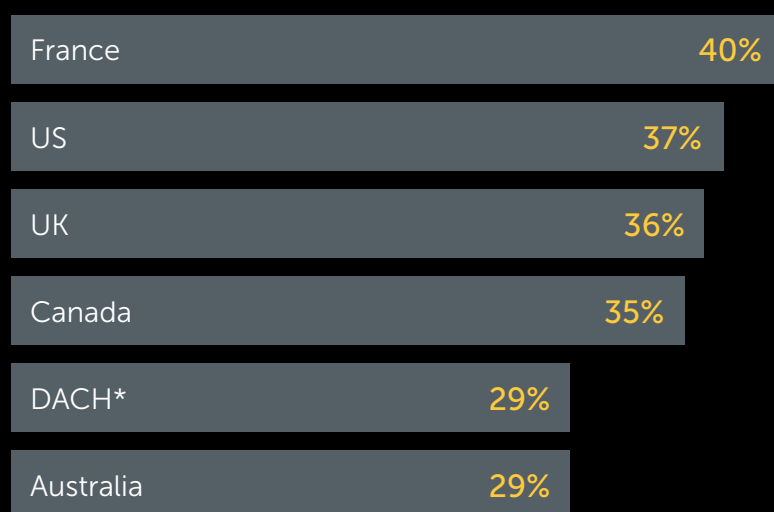
Canada has a high share of communicators in the workforce and lower productivity levels than most of the geographies studied, making the potential productivity boost from visual communications a valuable asset.

Many Canadian employees recognize that their leaders' communications are behind the times. Two-fifths (41%) believe that leaders communicate in the way they prefer rather than what is right for the workforce.

Over a third (37%) would like to use more visual communications at work and the country is experiencing a spike in video call adoption as a result — with a third (29%) saying it has risen recently.

## PART 3. THE EMPLOYEE IMPACT

Ranking of proportion of employees that would like to use more visual communications at work



\*Germany, Austria, Switzerland





## Country Focus: Australia

Australia has a lot to gain if businesses increase their use of effective visuals. The country could see a 0.55% boost to its economy — the second highest hike of any geography studied due to a combination of long working hours and a high proportion of communicating workers.

Australia has already made progress in adapting to today's visual trends and fast-paced thinking. Australian businesses put higher focus on work-based social networks, such as Slack, than any other region. A quarter (26%) of companies have invested in these over the last few years — significantly higher than the US in second place (16%).

# Conclusion

The way we communicate constantly evolves. Some trends come and go overnight. An online visual platform might be gaining users at lightning-speed on a Wednesday, and be obsolete by the following weekend. Other methods, like video and email, remain prominent for the long-term.

But one universal truth remains the same: as humans, we are visual animals. From cave paintings to cat memes and LOLing emojis, a picture can tell a story quicker and with greater impact than words.

Recent technological developments have shifted how people — especially younger generations — communicate. It's now simple and quick to create and share high quality images and video that deliver messages more quickly and better than text alone.

Employee expectations have risen as a result: if they can communicate effectively why can't their bosses? But many business leaders have been slow to react, continuing to rely on the same modes of business communication they have always used.

This is nothing new. It has always made business sense to communicate visually as the human brain reacts more quickly to visual content than written. This is no short-term trend. It is human nature.

But businesses must adapt sooner rather than later.

At a time when resources are stretched and the levels of disruption in business can be overwhelming, the good news is that the shift companies need to make when it comes to communications does not require a fundamental change to operations. With the right tools, knowledge, and leadership support, incorporating visuals into everyday processes is straightforward and unlocks productivity, creativity, optimism, and — as this study shows — profit.

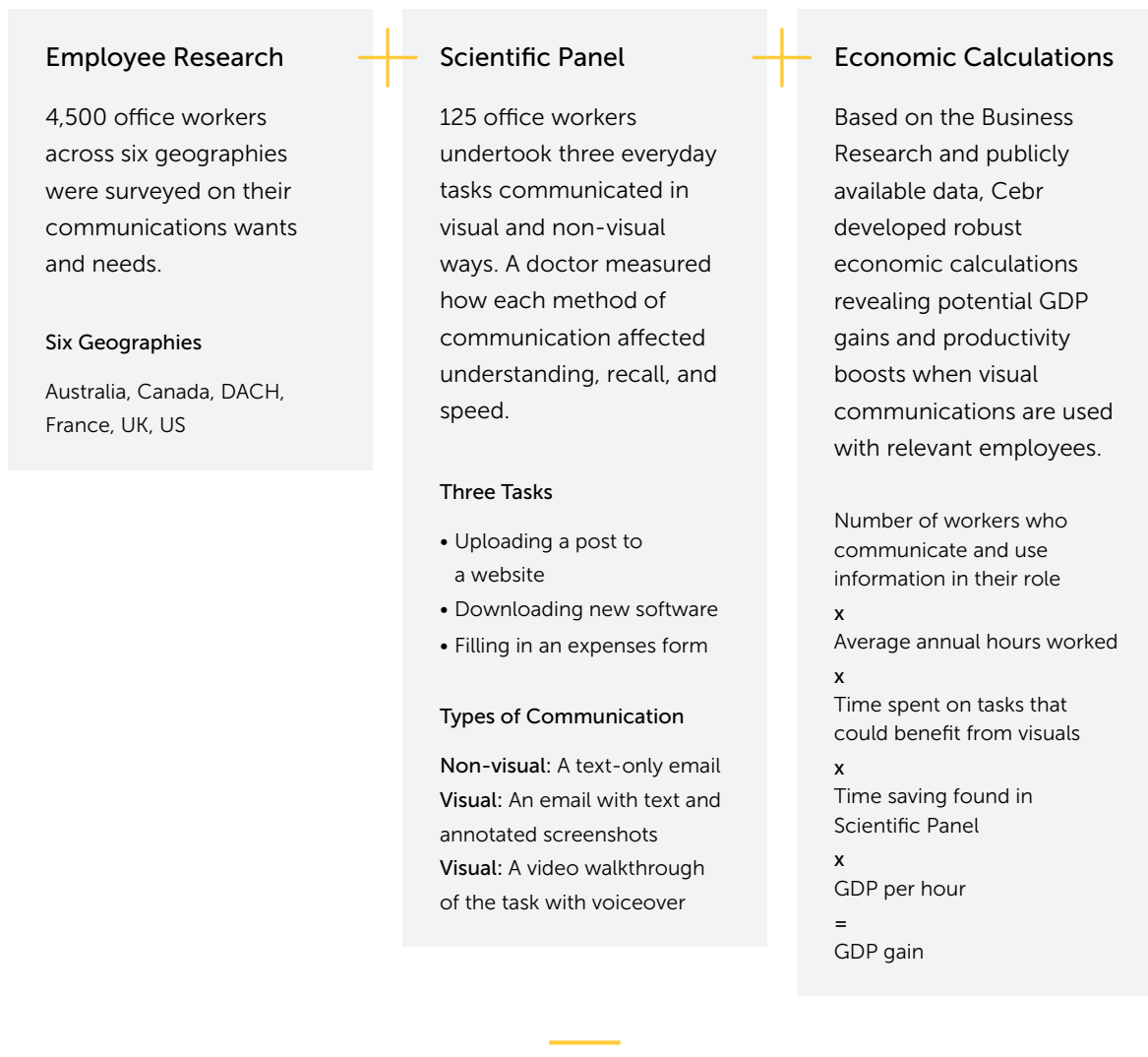
Businesses that fail to adapt their communications to today's workforce risk losing out on significant increases in productivity and watching top young talent move on to other opportunities.

The clock is ticking.

**"Businesses  
must adapt  
sooner rather  
than later."**

# Research Methodology

The Value of Visuals report is based on employee research, a scientific panel and economic research. The study builds a clear picture of the impact of visual communication on the economy and businesses by combining publicly available data with new proprietary TechSmith data from representative employee and scientific research, and using the findings to extrapolate and calculate robust economic figures.



**The Value of Visuals: A Business Case for Visual Communications in the Workplace**

The research was carried out between December 2017 and March 2018.





To learn more about how to create visual content for workplace communication, visit [techsmith.com/blog](https://techsmith.com/blog). To discuss the findings in more detail, contact us at [press@techsmith.com](mailto:press@techsmith.com)

## About TechSmith

TechSmith is the go-to company for visual communication. We help anyone create professional, impactful videos and images to share their knowledge with others.

Whether it's giving feedback on a project, teaching a course, or training others, it's hard to make sure people understand. That's why TechSmith has spent more than 25 years helping millions of people create visuals to get their point across in a faster, more engaging way.



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