Does tone of voice matter to big business?
At The Writer, we’ve always believed that what your brand sounds like matters as much as how it looks – if not more. But we would say that, wouldn’t we? (The clue’s in our name.)

Question is, are big brands getting the message?

When we landed on US shores three years ago, we soon realized that ‘tone of voice’ is a relatively new concept over here compared to the UK. There, it’s developed into a whole industry of its own, alongside design and branding. (We’ve been in the tone of voice business ourselves for over 15 years now.)

Imagine our surprise, then, when we found ourselves having to explain the concept of tone of voice on this side of the Atlantic.

But that was 2013, a lifetime ago in business years. And somewhere along the way, US companies started paying more attention to their words. Maybe it’s because ‘content’ and ‘storytelling’ became all the rage, but suddenly some seriously big businesses were seeing words and language in a whole new, strategic light.

Even so, the conversation still seemed stuck on what to say and where to say it. The content. The messaging. The channels.

What about how you say it? Your personality? Your tone of voice?

We know that some businesses are starting to see the light, and the benefits. (We wouldn’t still be here if they didn’t.) But why only some of them? What convinced them it was worth it? And are they actually seeing results?

We commissioned this research to get an independent view. There were some things we expected, and a few surprises along the way, too. Most importantly, there are plenty of clues as to why it matters – and why it’s only going to get more important from here on.

Here’s what we found.

Anelia Varela
US director
The Writer
At a glance

Some of the biggest businesses in the world are investing big in their brand language.

But what’s made them make the jump? How much are they spending? And why does it matter? No one has really asked these questions. Until now.

We spoke to almost 200 businesses across the US.

Half had a tone of voice. Half didn’t. This is what we found.

Who’s got a tone of voice, and why?

A good tone of voice can help to make complex messages easier to understand. So it’s not surprising that businesses in tricky sectors like finance, insurance and technology are the most likely to have a tone of voice. But no one sector is setting the pace.

A rebrand or brand repositioning is the most likely trigger for a tone of voice program. But the arrival of a new CEO is up there too.

Where do they go to get it?

Businesses are most likely to pick brand consultancies or ad agencies to develop their tone of voice. Very few go to specialist tone of voice agencies, but the vast majority of those who do say they get good or fair value.

Is it worth it?

Businesses with a tone of voice sure think so. They’re using it widely across their organizations. They say it’s at least as important as their visual identity. And their senior people see the value too. Nearly all businesses that have invested in a tone of voice would do it again.

How many businesses are missing out?

A lot – for now. Most businesses don’t have a tone of voice. Nor are they likely to get one anytime soon – very few of them have ever really thought about it. But only a small handful dismiss it as completely unimportant.
How we did the research

We commissioned this research to get an independent view of tone of voice in the US. Our partners, Illuma research, spoke to 196 people who look after their businesses’ brand or verbal identity. One hundred of them didn’t have a tone of voice, and 96 did.

If you have questions about anything in this report or want to see the raw data, you can contact Emelie at emelie@thewriter.com.

What do we mean by ‘tone of voice’?

There’s no industry definition of tone of voice. For this research, we described it as a verbal or written identity distinct from your brand’s visual identity. But we didn’t go into the different kinds of tone of voice guidelines or programs that businesses have.

So in this report, when we talk about businesses that have a tone of voice, it could be anything from a one-page summary that’s part of a brand book, to a full set of writing guidelines, to a complete program with training for all teams.

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In numbers

4 years

How long those with a tone of voice have had it, on average.

70%

The percentage of businesses with a tone of voice that say it’s just as, or more important, than their visual identity.

96%

The percentage of businesses with a tone of voice that would invest in it again.

$148k

The average amount businesses with a tone of voice spent on it.
Who’s got a tone of voice, and why?

We wanted a 50-50 split between companies with a tone of voice, and those without. This ended up being harder than we’d thought. Because, as it turns out, for every US business with a tone of voice, there are five without one. So who are the trailblazers?

Financial services and tech businesses are edging ahead

No single industry is way ahead when it comes to having a tone of voice. But of those that do, about 21% are in finance and insurance, and another 20% are in technology (including IT and telecoms).

Interesting that both of those sectors have had to rebuild trust with customers following the financial crisis and NSA scandal. Maybe they’ve realized that a tone of voice can help?

But finance companies are just as likely to not have a tone of voice. Along with manufacturers, they represent the second biggest sector among businesses without a tone of voice, behind retail and FMCG (20%).

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Businesses want to connect with customers and stand out from the crowd

If you send thousands of letters and emails, the words matter. Language is how customers get to know you, so it has to be relevant to them. It can also be a way of differentiating you from the competition, particularly if you sell something intangible, like insurance. So it’s no surprise that these are the two biggest reasons we’ve heard for developing a tone of voice.

Another is the need to get complex information across in a clear way – and it’s easy to see why both finance and technology businesses need to do that well.

If companies without a tone of voice were to develop one, they told us they’d do it for these same reasons. So it seems that while they do understand what a tone of voice can do, they don’t think it can do it for them. Or maybe they think they have other ways to get the same results.

Buy-in from the top is make or break

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Often, businesses develop a tone of voice when a new CEO comes on board and puts some weight behind it. This is the third most likely trigger, only just behind a new brand identity and a brand repositioning. It tells us savvy CEOs realize that focusing on language is a surefire way to make a noticeable change to the business.

Senior management need to get it too, if a tone of voice is really going to stick. A whopping 84% of those with a tone of voice say that their senior management see its value, and are really supportive and engaged.

Meanwhile, in businesses with no tone of voice, scarcely any top people even know it’s an issue. And 70% don’t see the value. So if the leadership isn’t interested, it’s not going to happen.

To what extent do senior management recognize its value?

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Where do they go to get it?

Mostly to brand and ad agencies that they’re probably already working with. This isn’t surprising since the tone of voice industry here is so young – and specialist agencies are few and far between.

Brand consultancies and ad agencies are the most likely go-tos

More than half of businesses with a tone of voice went to a brand consultancy or ad agency to develop it. About 20% used designers, and another 20% did it themselves.

…but the least predictable when it comes to results

Of those that went to the more traditional brand, ad, or design consultancies, 44% say they got ‘good’ or ‘fair’ value while just under 56% said they got ‘slight’ or ‘no’ value.

Specialist tone of voice agencies are virtually unheard of

Hardly anyone knows about specialist tone of voice agencies, whether they have a tone of voice or not. Only a tiny handful of businesses actually used one to develop their tone of voice.

…but they get the best results so far

Nearly all of the businesses that went to a specialist tone of voice agency said they got ‘good’ or ‘fair’ value from the work. But, to be clear, we could only find four who weren’t clients of ours so we’re still in early days.
Is it worth it?

Businesses who have a tone of voice certainly think so. The research shows they’re happy with it, and can see the difference it makes. But it also tells us that for many, it’s still taking root and that some of the value might still be to come.

People use it and believe in it

Those with a tone of voice are using it nearly everywhere. Eight out of ten say it’s reached most or all functions in their organization. Given that, it’s not surprising that around the same proportion also say their rollout was very successful.

No sensible business doubts the value of its visual identity these days. And even though tone of voice is the newer kid on the block, the vast majority of businesses that have one value it as much as their visual identity.

That could be because tone of voice touches more people in the business. Not everyone uses logos or thinks about color palettes. But they do use language, all the time.

Senior people appreciate it

As we said earlier, in more than 80% of businesses with a tone of voice, senior management recognize the value of it. That could be because they’re the most likely to see and appreciate the benefits. Like money saved from a drop in complaints thanks to clearer communications. Or more big new business wins thanks to better bids and proposals.

How widespread is its use within the organization?

To what extent do senior management recognize its value?
Almost everyone would do it again

Nine out of ten businesses with a tone of voice, to be precise.

But not right away

Those with a tone of voice have had it for about four years on average. Many haven’t reviewed it since. Most think it only needs reviewing about every six years.

And they’re starting to see value

About half of businesses with a tone of voice say they’re getting good or fair value from it. Most of the rest say they’ve had ‘slight’ value.

A handful say it’s too soon to tell, and that shouldn’t be a big surprise – remember, most businesses with a tone of voice have only had it for just under four years. That just shows how new an idea it is, and that businesses are still learning to exploit it.

To what extent do you feel you got value from your tone of voice spend?

It’s going to keep being important in the future

More than eight out of ten companies with a tone of voice think it’s going to stay at least as important in the next few years as it is now. And more than half of those businesses say it’ll become more important.

How is the importance of tone of voice likely to change over the next few years?
How many businesses are missing out – and will they change their minds?

Businesses who have a tone of voice may be seeing the benefits. But the fact is, they’re heavily outnumbered. At least for now.

Four out of five US businesses don’t have a tone of voice

That’s based on our sample for the research – only one in five businesses we talked to initially said they had a tone of voice. (We had to find more to even it out.) If that’s representative – and there’s no reason to believe it isn’t – that means four in five businesses are missing out.

Does your organization have a tone of voice?

Those without a tone of voice are in no hurry to get one

Almost all (94%) of those without a tone of voice say they’re not likely to develop one in the next few years. It just doesn’t seem to be on their radar – only 16% of them have ever thought about reviewing their language.

What’s interesting is that, although 80% of them say it’s less important than their visual identity, only 14% dismissed tone of voice as completely unimportant. That’s a small hint that at least some might still change their minds. Maybe when they start seeing the positive effects on the brands who got there first?

Have you ever considered reviewing your organization’s tone of voice?
So you’re thinking of taking the plunge…

Tone of voice is still finding its feet here in the US, but those who have it rave about it. On the other hand, if you don’t have it, you might face a tough fight to get it on the agenda. Here are some pointers to help you come out on top.

Get the boss involved

Over the years, we’ve learned that top people can get tone of voice moving, or stop it dead. And this research supports that. A new boss will often see it as a way to make their mark. But if your CEO and senior executives aren’t chuffed up yet, start working on them. Or you might not pass first base.

“Language is everywhere and too critical to leave it to your old style guide. Intentionally governing your brand’s voice pays dividends across your customer’s entire journey. The emotional feedback and data have proven it repeatedly. It’s the real foundation of your brand experience.”

Michael Lenz
Global director brand experience
Cisco

Invest in it

If it’s worth doing, it’s worth doing well. The businesses where language matters most are the ones most prepared to put their money where their mouth is. Clearly, financial services and technology businesses appreciate that developing a tone of voice that people understand and use is a serious investment.

Keep it fresh

Once your language is set, don’t neglect it. Businesses change, markets change, customers change. Your language needs to keep up. That doesn’t mean you should rip it up and start again every few years. But language evolves over time, so your’s should too. Make sure you keep it current and relevant with up-to-date examples from all corners of your business.

Measure, measure and measure some more

You won’t really know if you’re getting value from your tone of voice unless you measure it. Take your most read, most sensitive, and even most complained-about pieces of writing. Write them in the new tone of voice and watch out for changes. Fewer repeat complaints? More engaged employees? Response rates up? More click-throughs? That’ll be the new tone working. Any skeptics? Show them the numbers. Skeptics respect numbers.

Think about using a specialist

Companies often tell us: ‘We’ve got a tone of voice. But it hasn’t really landed.’ Their branding or ad agency may have come up with some principles for how they should sound. Maybe they wrote some guidelines. But if those guidelines are stuck on the shelf or in a drawer, they’re not earning their keep.

Tone of voice consultants who are writers themselves know what works for people who write every day. And how to train them and encourage them. They also know how to keep the enthusiasm going long after the brand launch party’s over.

“The Writer has helped us define a convincing tone of voice. But more than that, they’ve helped us use this way of writing to inspire all areas of the bank – even those that are subject to complex legal or regulatory requirements.”

Hasmita Mistry
Head of brand strategy
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