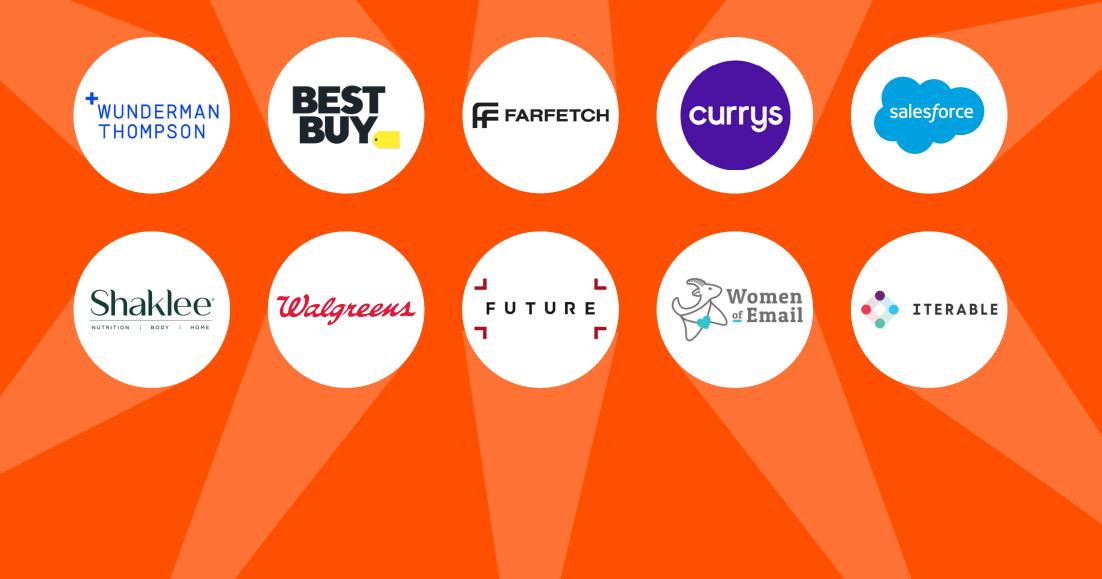




Say it better: Brand Voice Survey 2021



## This report features insights from:





## Foreword from Parry Malm, CEO of Phrasee

It's what you say as a brand that defines how your customers perceive you.

Words are your way into the hearts and minds of customers. Think about it: when a prospect finds you via a Google search, the results are presented in text. When a customer goes to a website, it's language that ultimately steers them through their purchase journey. In email marketing – still the channel with the highest ROI - it's words that define success. And with businesses now relying on much more than just great in-store experiences, the legwork is being carried out via online messaging.

In this copy-dictated era of multi-channel marketing, we decided to lift the lid on language: are brands taking this elemental part of the customer experience seriously enough? Are marketers really nailing, developing, and projecting their brand voice?

At Phrasee, we're known for relying on data over gut instinct – it's sort of our thing. So, building on our <u>research from late 2020</u>, we opened the floor to 300 senior marketers from across the US in a survey commissioned by Dynata, the world's largest first-party panel.

The results have been both heartening and disconcerting.

Heartening because in this age of multi-channel marketing, more and more brands are coming of age and finding their voice. Disconcerting because, as with any good coming-of-age story, there are signs of growing pains.

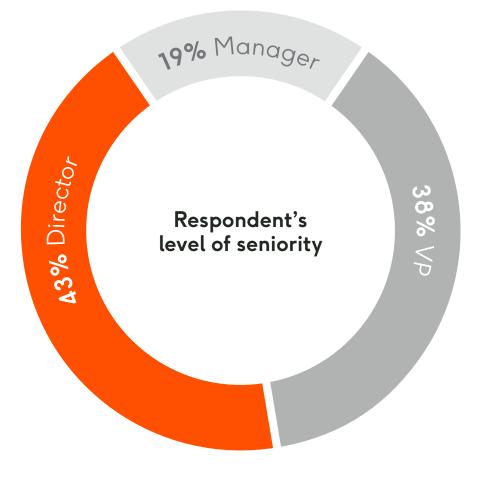
Finding, finetuning, and scaling a brand voice while staying true to the company's vision is a delicate balancing act at the best of times. Pair this with the resource-draining ecommerce chaos of the early 2020s, and what you have is high-wire havoc.

Sure enough, marketers are stressed, under pressure, and increasingly ready to turn to AI technology to solve their problems. It's a tale as old as time: as the pressure on resources increases, so too does our drive to seek the help of technology.

Time will tell, though, as to whether this is a breakthrough – the turning point at which technology and marketing combine to fulfill the potential of brand language. Our data suggests we might be on the cusp, but that methods and mindsets will need to change at the top level before we reach a watershed moment.

For now, my message to brand marketers is this: You have a unique brand voice to be proud of. It's taking center stage, and you have the quality content to back it up. But are you doing enough to ensure your customers are consistently hearing, recognizing, understanding, and downright dancing to it?

## Survey demographics



#### Respondent's duties:

**80%** Digital marketing

**72%** Social media marketing

**62%** Marketing management

**61%** Content marketing

55% Product marketing

# Center stage.

# Brand voice hits the big time

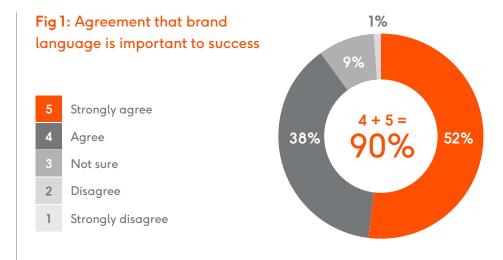
Brand voice is taking center stage, but can marketers keep the audience's attention?

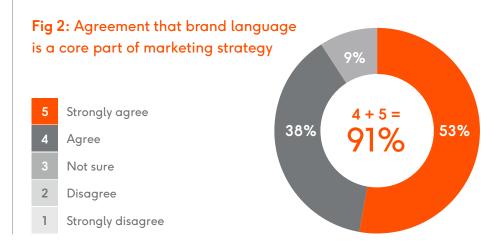
# The penny drops as brand language climbs up the priority list for marketers

The central importance of brand language is going mainstream. Businesses are putting more focus on unifying a consistent and powerful brand voice than ever before, while marketers are increasingly confident in their own unique voice.

Brand voice defines how customers perceive you as a business: it can be the icebreaker; the foot-in-the-door; the trusted advisor; the loyal entertainer; but mastering all of these modes requires pitch-perfect brand language tailored to each channel and touchpoint. Marketers are realizing that by optimizing the language they use across the full customer journey and spectrum of digital brand channels, they can capture and maintain the attention of their audience at every step of the customer journey – from first click to conversion. The results are an indication of the widespread acceptance of brand language as the gatekeeper of customer loyalty and engagement:

There is a very high level of agreement that brand language is important to business success (90%) and that brand language is a core part of marketing strategy (91%).

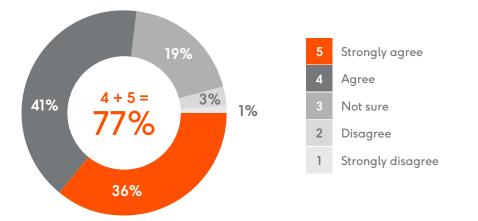




### But the next step is the key.

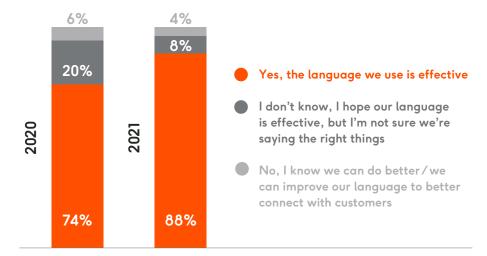
While businesses increasingly recognize the importance of brand language to the customer experience, a number of limitations are testing these good intentions. Marketers are missing the resources, the data insights, and in some cases the tech knowhow to be able to stay on-brand and keep customers consistently engaged across channels.

Customers' views and experiences of brands are fracturing into multiple, often conflicting beliefs, feelings and views - fuelled by an accelerating number of channels, customer touchpoints and routes to market that marketers need to worry about.



#### Fig 3: Agreement that organization has a distinct tone of voice

A distinct and unique brand tone of voice is highly important (84%) and most marketers believe they have achieved this (77%).



#### Fig 4: Believe language helps brands connect with customers

A large majority of 2021 survey respondents currently believe the brand language they are using helps their brand connect with customers and this has improved over time - 88% in the current survey compared to 74% in 2020.

In a digital age in which marketing channels abound, it takes mountains of marketing to have an impact. The challenge for marketers is to take their unique brand voice and scale it across channels and customer journey – and do so with inexhaustible copy that's consistently on-brand, relevant, and engaging.

The question we'll tackle in the following section is: can marketers keep up? Having laid the groundwork with their unique brand voice, can they use it to keep the audience consistently captivated?

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Customers are busy – they have lives to lead. As marketers, our job is to use language that resonates quickly. Authenticity is the driving force here and is what consumers expect, but connecting with customers one-to-one is impossible at scale unless you're automating. We've finally hit a place where technology, data, and creative can truly start to tell customer narratives and market to a user in a meaningful way.

The thing that's been missing in ecommerce has been the experience you have when you walk into a store – the "Hello Gareth, how are you? You bought those shoes last time, here are some others you might like". Until recently I don't think enough retailers have had the data, the technology, or the creative to really target in the same vein as they do when a customer walks into the store. But I think now the omni-channel is really coming together - and I think it's the future."

Gareth Jones, CMO at FARFETCH

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Brand language and voice becomes even more important to building loyalty with the shift to digital experiences. We can't rely on great in-store experiences anymore – the legwork is carried out via digital communications.

Using our brand voice to be human and offer empathy, inspiration, and support for our customers is as crucial as driving clicks. We put the customer at the heart of what we do, so the language we use needs to convey that we know and understand our customer - nailing that tone can be challenging when so much is going on in the world. Instead of just focusing on traffic and conversion rates, measuring commercial success needs to focus on creating and deepening customer relationships and how you retain those customers in a way that's relevant to them."

Kristi Wraspir, Director of CRM Strategy & Personalization at BestBuy



# Stage fright. The struggle to keep customers engaged

As with any good coming-of-age tale, there are signs of growing pains for marketers trying to increase the power and scale of their brand voice.

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The challenge of keeping customers engaged across channels and touchpoints is colliding with a host of external and internal pressure points. Marketers are stressed, under pressure, and increasingly ready to turn to AI technology to solve their problems.

#### Growing pains for brand marketers

Three out of five marketers are struggling to keep their brand language interesting and engaging - and do so in a way that is tone-sensitive and on-brand, rather than resorting to cheap tricks. Letting consumers know you share the same values and beliefs, the same concerns, or even the same sense of humor can produce in them the feeling of a relationship with your brand. It makes you memorable, and that can have an incredible impact on the bottom line.

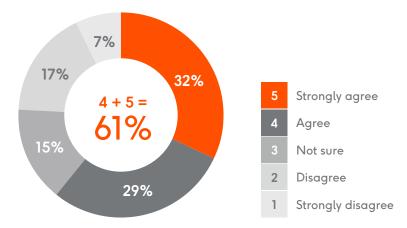
But it's not without risk. Marketers may alienate those they intend to align with if they appear inauthentic or tone-deaf, and thanks to the viral effect of social media, any missteps can be rapidly amplified.

In this context, marketers are under increasing stress to consistently strike the right tone and constantly worry about the long-term cost of hitting a bum note.

**Fig 4:** Brand marketers constantly worry about long-term cost of communicating wrong message or having wrong tone

36%





#### 68%

of marketers are more stressed about striking the right tone compared to a year ago.

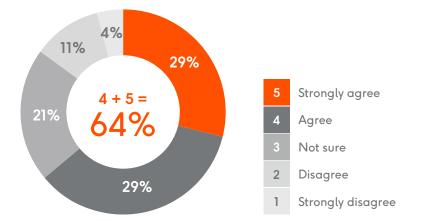
#### **3 out of 5** marketers say that it's a struggle for their organization to keep marketing language interesting

#### 36%

constantly worry about the longterm cost of communicating wrong message.

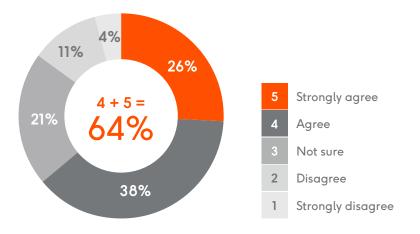
The data indicates that this is due to a heady mix of external and internal factors. The frenzy of disruption that has characterized the 2020s so far is forcing marketers to continuously update and revise language strategies in response to sensitive world events - and this has collided with an internal lack of resources and organizational silos damaging the coherency of brand messaging.

and engaging.



## **Fig 6:** Process for creating content and getting approvals has changed in past 12 months

## **Fig 7:** Agreement that current environment has made organization rethink language



63% say their organization consistently revises language to ensure sensitivity to world events

Recent world events create more pressure for brand marketers (68%) as the current environment has forced most marketers to rethink brand language (64%). In order to keep up, communication policies and procedures (68%) as well as approval processes (64%) have changed in most organizations over the past 12 months

## A lack of resources (55%) is considered one of the internal barriers that prevents the creation of good content

All of these are barriers to clean, consistent, effective messaging – the ultimate marketing challenge of the digital age. Brands light a fuse when their message connects with a customer, but that spark of recognition can just as easily fizzle out when another advert, email, or notification comes along in its place. We live in a world in which your average modern person sees up to 5000 adverts per day according to most estimates. Piercing through the noise is an ongoing task, defined not by moments, but by consistency of compelling messaging.

So while brands may have nailed their distinct voice, the challenge of turning clicks into loyal customers in 2021 requires more than lightbulb moments: it requires consistent, compelling cross-channel engagement.

The question is: how do you make those lightbulb moments last?

Trying to remain sensitive across all our messages can be quite difficult when you've got thousands of communications going out on any given day being done by different teams. We're very focused on helping customers become customers for life, rather than just for today.

Our products are not something you buy every day or every week like groceries, so if we want to be the go-to for all of them, we have to really impress our customers and engage them all the way through their journey. That means we need to understand what customers need to hear and when: for example, our research shows that prior to handing over their hard-earned cash, people want advice about the tech they buy – so we need to understand when to use educational messaging rather than sales-focused language.

Our job is to support our customers to get the most out of their products, so our brand voice needs to consistently reflect that. We think about it as landing the right thing with the right customer, just in the right moment, for email or text, when you walk into a store, when you come on to our website. We're working with strategic technology partners to try and make the experience as personalized and relevant as possible."

Dan Rubel, Brand & Marketing Director at Currys



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The last 18 months have expanded our team's mindset about what's possible when it comes to optimizing our brand language for maximum reach, commercial impact, and customer loyalty. Consistency is core to our brand voice, but so is change. By testing, iterating, and optimizing we are constantly learning over time about what language resonates with customers and how that's evolving. As we apply our learnings across all of our digital channels, we increase our laser focus on continuous improvement of the customer experience."

Brian Tyrrell, Senior Director, Customer Marketing Platforms at Walgreens

Walgreens

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Ensuring a consistent brand voice across all communications and channels is a time-consuming task that requires operational excellence and a very sleek process. Marketers have an impossible task at hand and that is where tools like Phrasee come in – having the power to automatically communicate with your customers across any channel with a consistent brand voice, at the exact time they need, is the future of CRM. No matter the channel, no matter the device, customers will get a personalized experience in the moments that matter. We believe that breaking organizational silos is the first step to make a brand whole again."

Mariana Lima, CRM Partner at Wunderman Thompson



## "

Customer relationships are built moment by moment. It's really about creating personalized engagement that shifts, moves, and evolves based on who the customer is, the content they interact with, and what they're interested in. To build lasting relationships, marketers should use data to deliver relevant content throughout customers' journeys with the brand and artificial intelligence and automation to optimize content for real-time personalization, based on customers' engagement, to ensure meeting customer expectations."

Blake Miller, Senior Director of Product Marketing at Salesforce



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In any coming-of-age story worth its salt, the third act is the one in which the protagonist overcomes adversity and finds success.

Can technology adoption be that turning point for brand marketers?

### A great slogan alone doesn't cut it anymore.

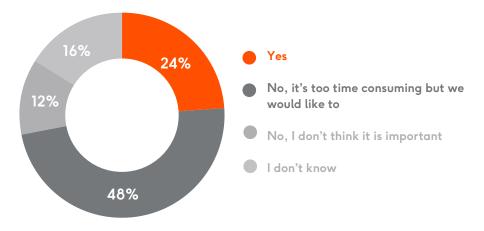
You can't bottle your brand voice up in a master document or preserve it in a single slogan. It needs to live, breathe, learn, iterate, evolve, and scale - and it needs to do all this while staying true to that master vision proudly agreed upon by the business.

But the reality is that for most brands out there, there are only so many hours in the day - and only so many marketers on staff - to generate, test, and optimize great brand content on a consistent basis. This has been particularly true during the frenzy of disruption that we call the 2020s so far, in which marketers are having to constantly revise, update and pivot around changing events, as we saw in the previous chapter.

With all this considered, it is simultaneously shocking and totally unsurprising to find that less than one in four marketers is doing any type of testing to understand what is resonating with customers, with almost half of those deeming testing "too time-consuming." The majority of those that are testing are only using A/B or split testing, rather than more thorough multivariate methods.

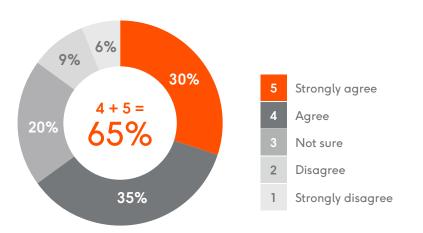
Only about one in four (24%) do any type of testing to understand what is resonating with customers.

**Fig 8:** Organization is testing to understand what language is resonating





Focus groups of Optimization Language testing of Split testing Surveys Statistical measurement Aptitude Email testing A/B Testing Ad rotation Multivariate testing **Fig 8:** Compared to a year ago, organizations have a higher level of trust in AI to help create brand language that aligns with desired brand tone

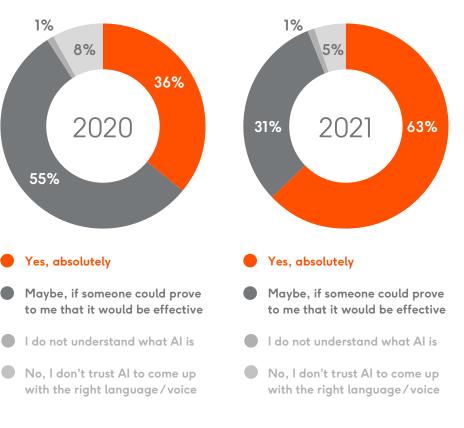


Given the current strain on marketers' time and resources, it's perhaps even more unsurprising to find that brand marketers are now showing an increasing willingness to turn to technology to help with their long list of stress-inducers.

Compared to a year ago, 65% of organizations have more trust that AI can help create desirable brand language.

## Fig 9: Marketers would trust AI generated copy to represent brand

**Fig 10:** Marketers would consider investing in AI tech to generate and optimize copy



Appetite for technology investment has spiked in the past year as resource strains have increased pressure on marketers.

63% would now consider investing in AI to generate and optimize copy – a significant increase from only 36% in the 2020 survey.

### Is it time for a breakthrough?

Time will tell as to whether this is the turning point at which technology and marketing combine to fulfill the potential of brand language. Now that brands have found their voice, they're struggling to scale it – but as our results show, they're also finally coming around to the power of AI technology.

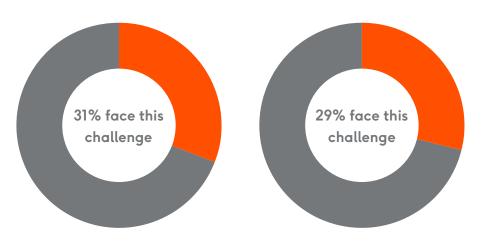
Why, then, are almost a third of marketers not using technology effectively to optimize brand language? Our results suggest that resources are not the only issue. Marketers are not getting the top-level technology support they require, with only 31% claiming confidence in top management's commitment to new technology.

37% say that their confidence in top management could be improved, and another 31% claim that top management does not support their trial of new technology.

Several organizations (29%) do not use technology effectively to optimize brand language.

**Fig 11:** Top management does not support trying new technology

**Fig 12:** Organization does not use technology effectively to optimize brand language



It makes perfect sense that the appetite for technology investment has spiked in the past year as various disruptive factors have turned up the heat on marketers. It's a tale as old as time: as the pressure on resources intensifies, so too does our drive to seek the help of technology.

Perhaps we're on the cusp of a breakthrough – but evidently mindsets will need to change at the top table before we reach the watershed moment of technology-optimized brand language.

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As marketeers, one of our jobs is to make sure our copy hits the mark and really resonates with our customers. Our tone is on the edge of being not too serious, yet not polarising, so the risk of veering off course is always there. By using AI technology, we can take our test and learn approach and marry that up with the brand TOV at pace across a number of campaigns and touchpoints. It leaves us with consistency and variety in our messaging and takes out the emotion (at the right time) from our decision-making."

#### Ryan Martin, Head of CRM at Future Savings



Connectors. Creators. Experience Makers.

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Technology has the potential to answer the biggest concerns of marketers today. CMOs are growing more and more concerned about the cost of a wrong note – but AI can generate language that is always on-brand. From there, testing and scaling are absolutely key to driving maximum engagement. Marketers ideally need to be running multiple tests across different platforms to see quickly what doesn't work and then scale the successful pilots.

The ability to react to customer behaviors in real-time - for example with cart abandonment emails - and test quickly will allow brands to run more successful campaigns that drive revenue and foster more long-term loyalty.

Most brands aren't realizing the rich data they're sitting on. If they did, they'd activate that data to optimize their targeted audience segments and engage with clients in ultra-relevant ways."

Marissa Contreras, Senior Director, Digital Experience & CRM, Shaklee Corporation



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The number of hours in the day hasn't changed. But demands on marketing teams are greater than ever before, and budgets are largely stagnant. Talent is also at a premium. So it's currently the norm for teams to be spread thin just to get the bare minimum out the door. Opportunities to test and optimize are limited.

But also, the vast majority of marketers don't have a solid grasp on testing and optimization fundamentals. When they are able, they're going through the motions of rudimentary tests without accomplishing much. Bad testing advice is widespread. And many testing tools aren't designed to compensate for marketers' lack of optimization expertise."

Jen Capstraw, Founder of Women of Email



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Brand voice is a unique differentiator for businesses. Now more than ever, brands need to be able to forge deeper customer experiences with onbrand, personalized, and optimized message copy to meet customers where they are and in the moment. Leveraging AI-powered copy optimization can maximize engagement and manifest your unique brand tone to enrich customer experiences at scale. Business leaders need to take full advantage of tech solutions that improve consistency with their brand and increase efficiencies across digital touchpoints with their customers."

Anthony Chiulli, Senior Manager of Product Marketing at Iterable







Phrasee revolutionizes customer experiences through Brand Language Optimization. We help visionary enterprises engage with customers by optimizing the language they use across the full spectrum of channels.

Phrasee helps global brands say it better.

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