

Audio Branding Barometer 2011

(((ABA)))
AUDIO BRANDING ACADEMY



Audio Branding Barometer 2011

Audio Branding Barometer 2011 - Overview

This survey was carried out by the Audio Branding Academy in September 2011. The aim of the survey is to gain valid market data about the audio branding industry.

The results shall provide transparency and be a basis for decision making for both suppliers and demanders of audio branding services.

Agencies from 13 countries had participated in this year's study. Participation was limited only to audio branding suppliers and controlled by randomly generated passwords.

A documentation of the survey will be included in the Audio Branding Academy Yearbook 2011/2012 to be published beginning 2012.

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Survey Profile

Population:	All professional suppliers of audio branding worldwide
Sampling Method:	Multilevel online research of all suppliers of audio branding. The invitation to the survey was sent to 145 agencies
Sample:	32 decision makers and authorized representatives of audio branding suppliers took part in the survey (n = 32)
Data Collection:	Online questionnaire with controlled access
Survey Period:	September 2011
Research Institute:	Audio Branding Academy, Hamburg, Germany

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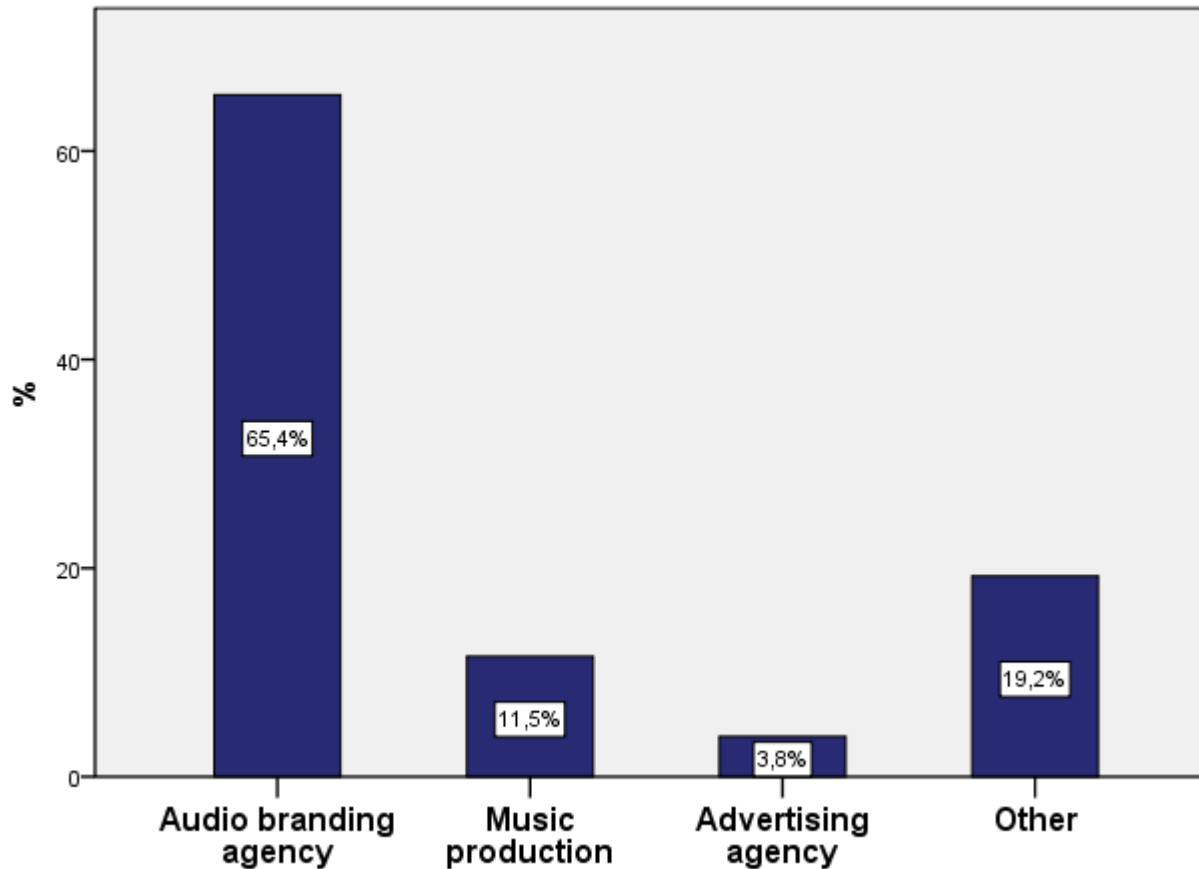
Contents ABB 2011

1. Company Profiles
2. Revenue and Clients
3. New Business Projects and Pitches
4. Trends
5. Terminology
6. Science

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Company Types

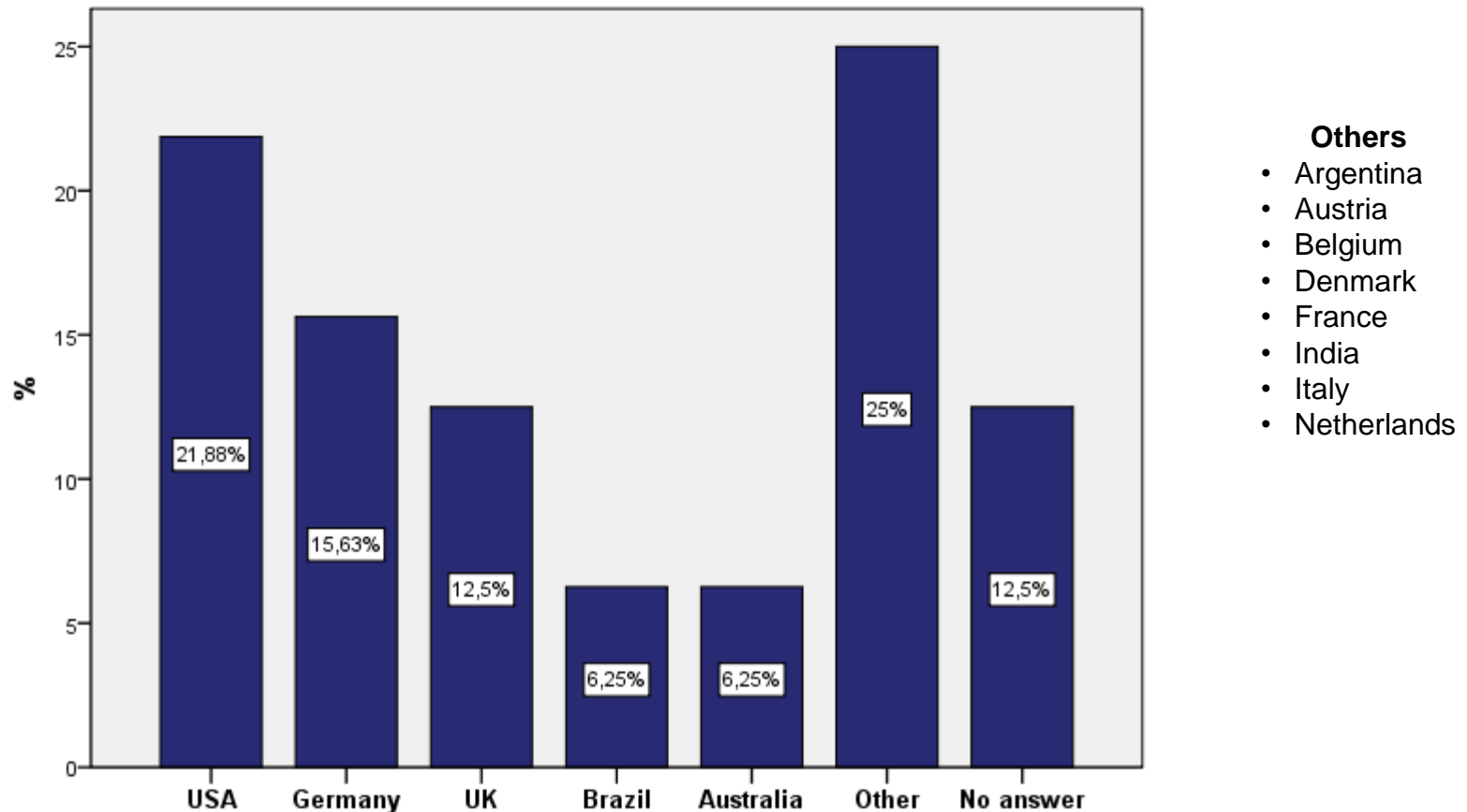
Question: What profile most closely matches your company?



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Locations of Agencies - Part 1/2

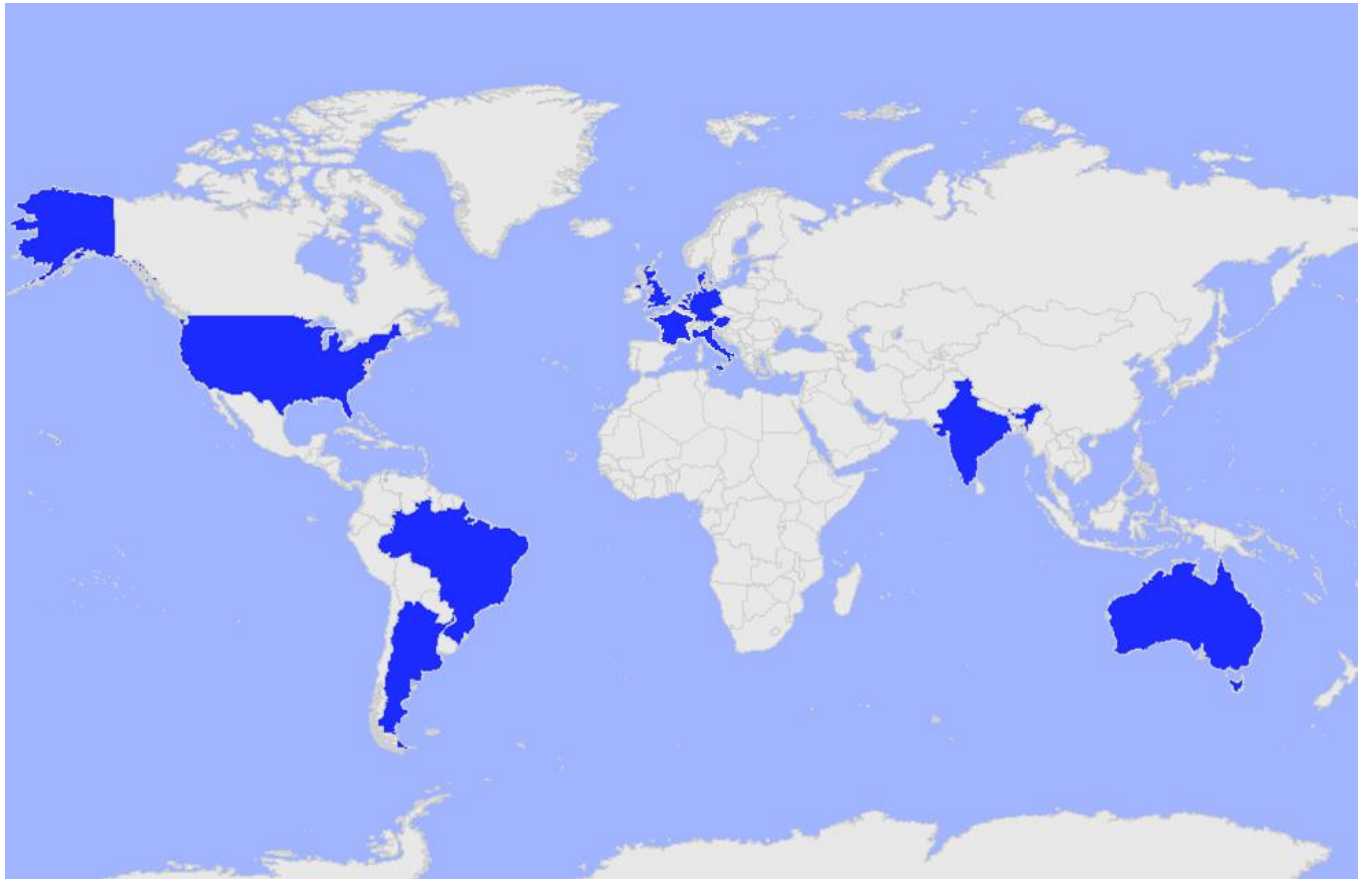
Question: Where is the company located?



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Locations of Agencies - Part 2/2

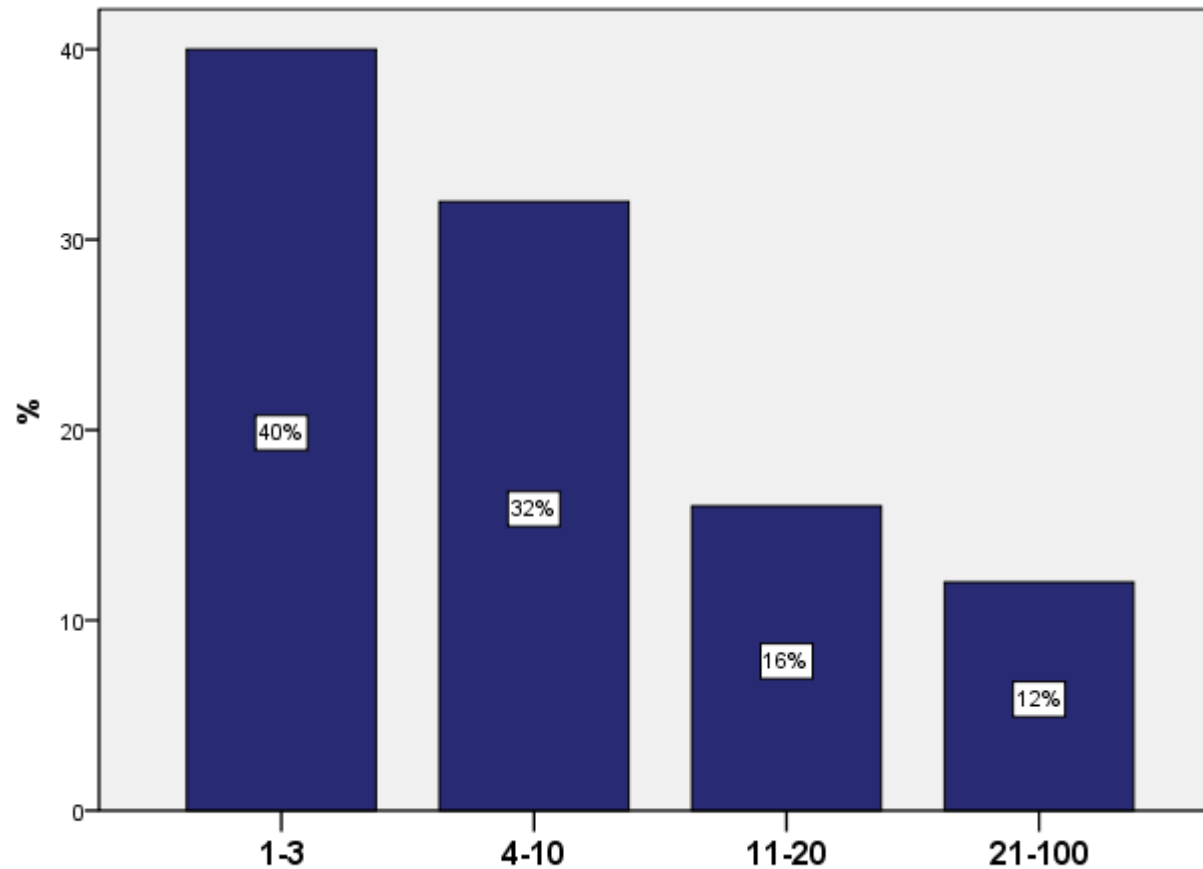
Question: Where is the company located?



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Number of Employees

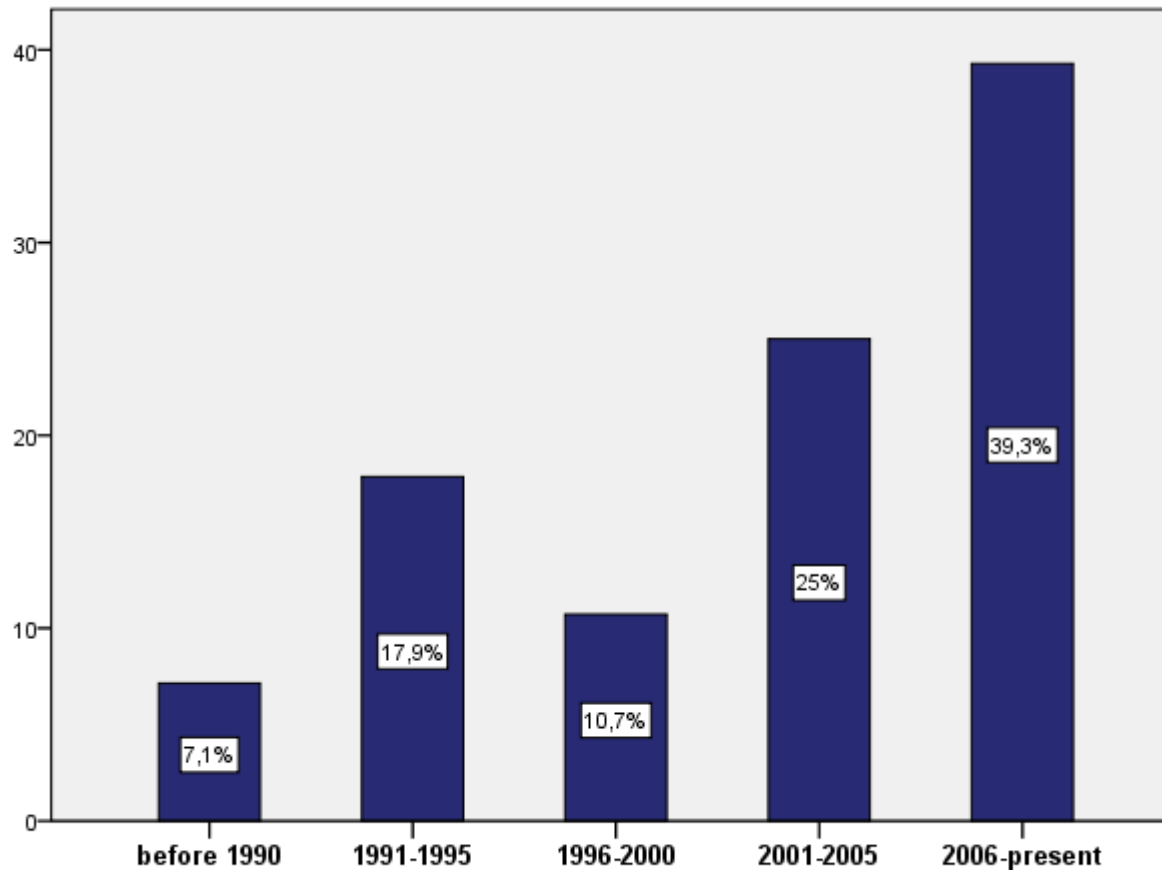
Question: Current numbers of employees in *permanent* positions?



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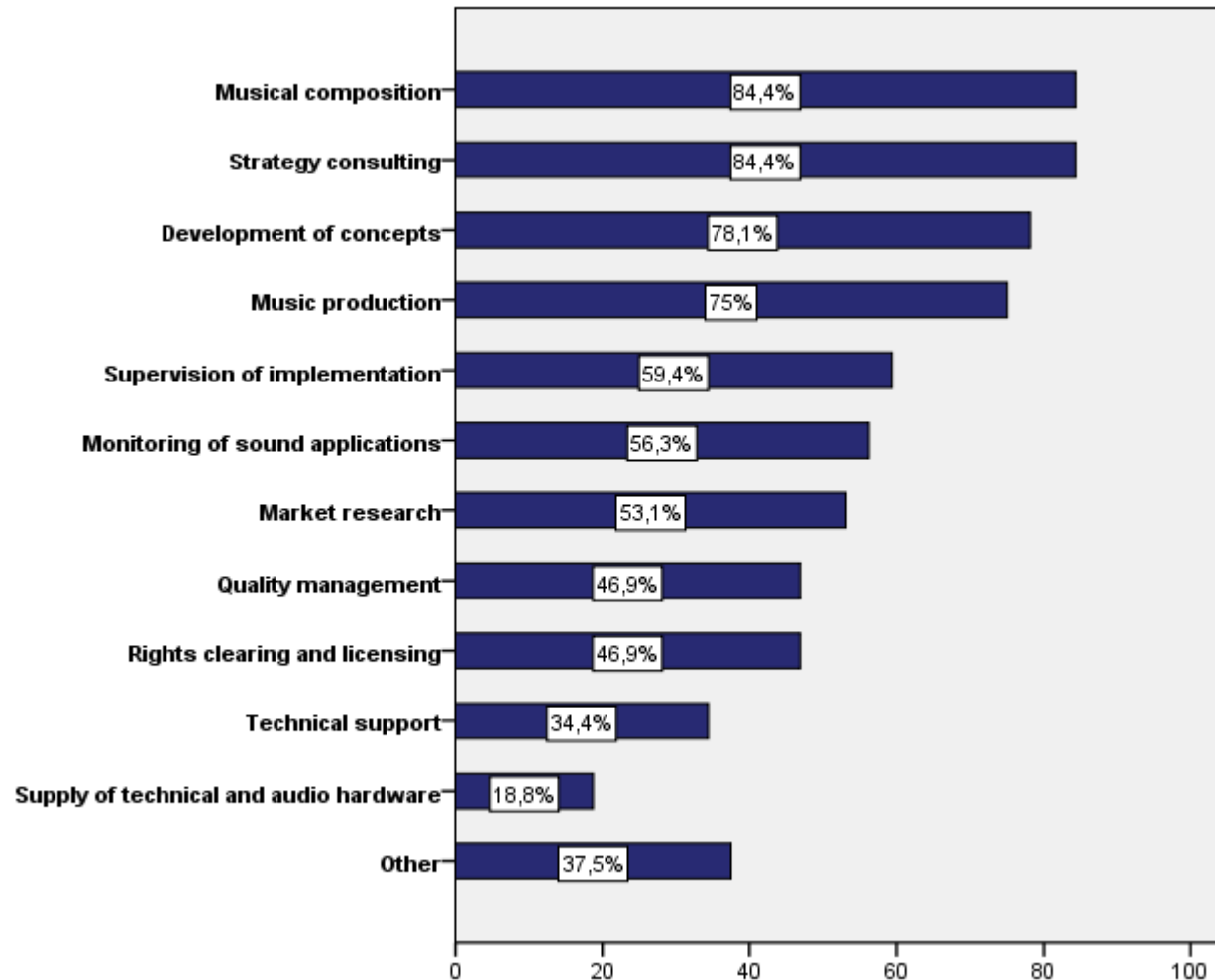
Year of Foundation

Question: When was your company founded?



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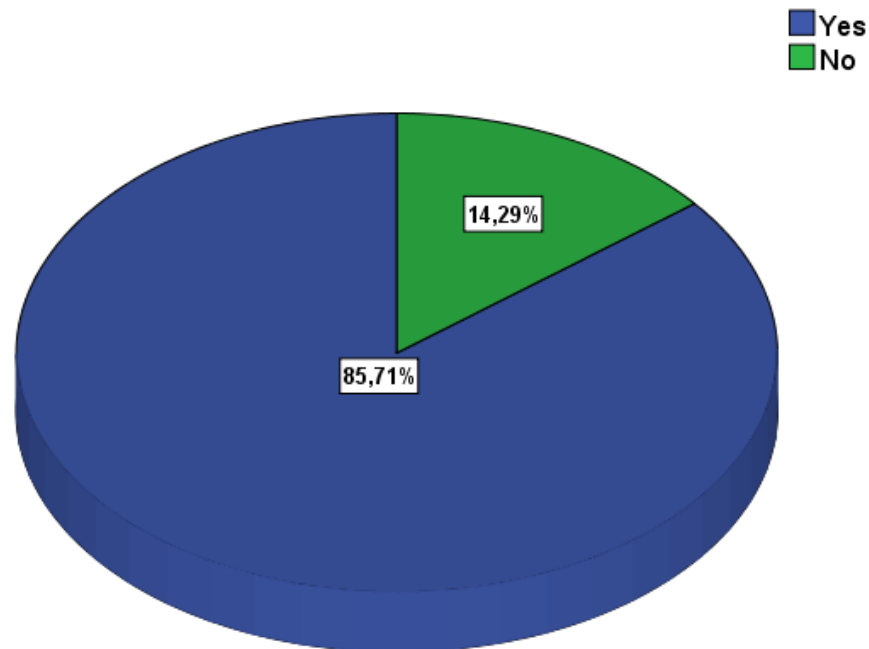
Question: What kind of services does your company offer?



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Strategic Planning

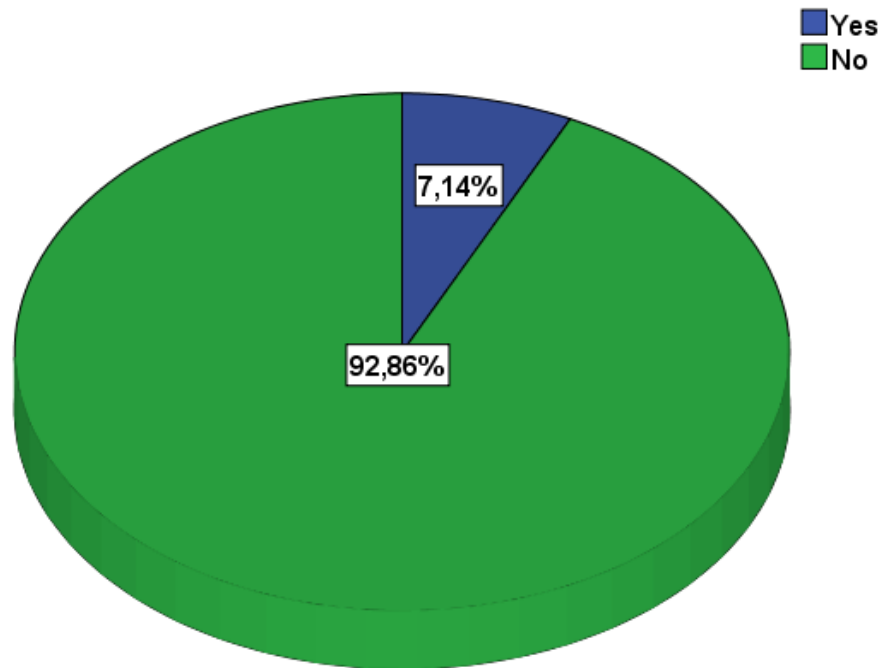
Question: Does your company offer comprehensive strategic planning?



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Independent or Network?

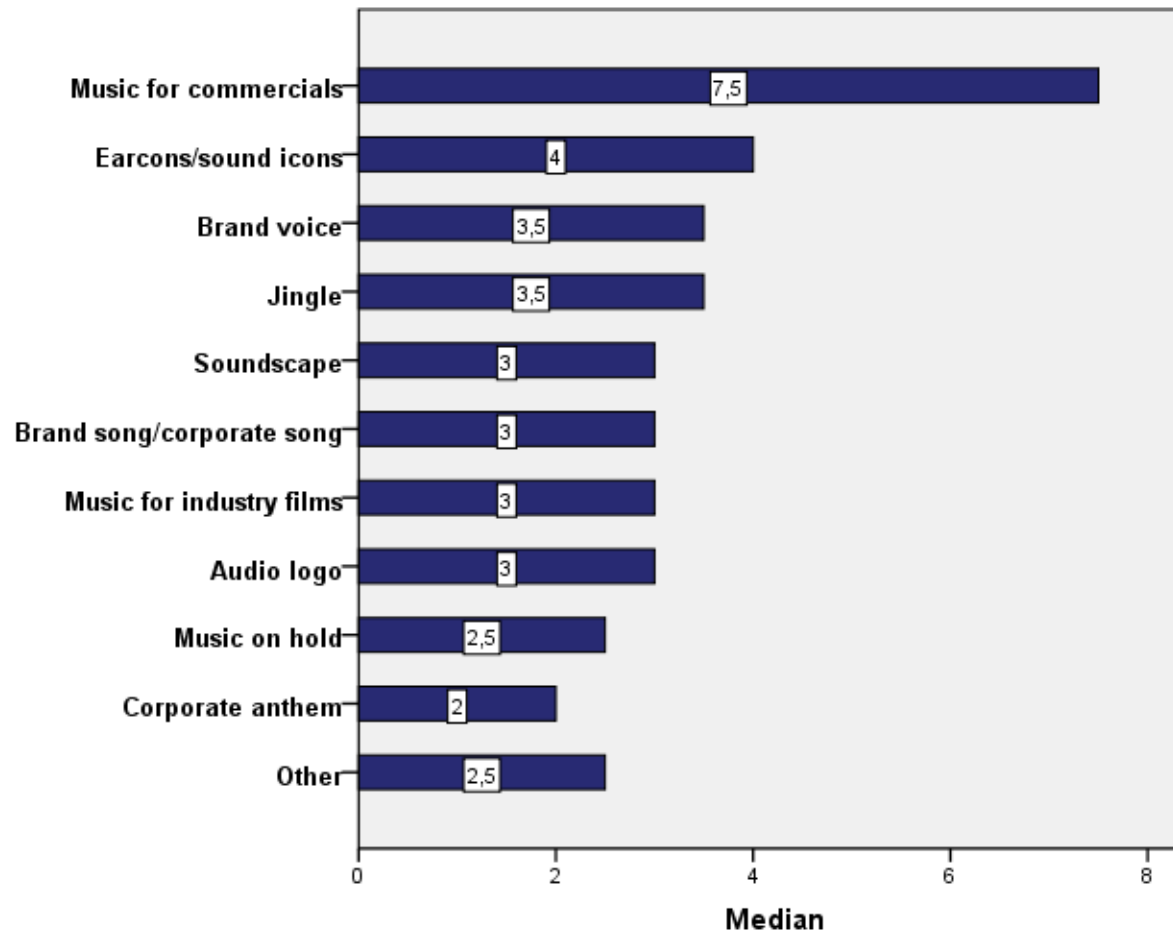
Question: Is your company part of an agency network?



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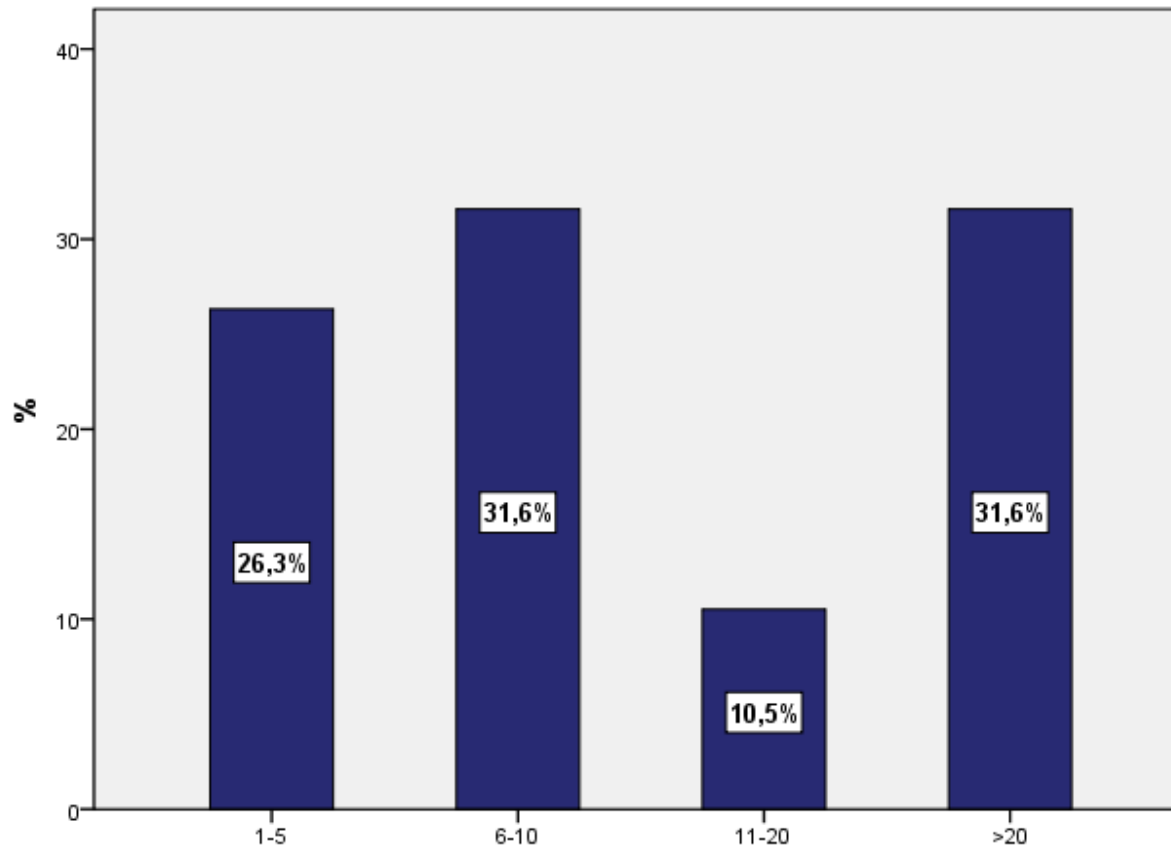
Share of Delivered Audio Branding Elements

Question: How many of the following audio branding elements did you deliver in 2010?



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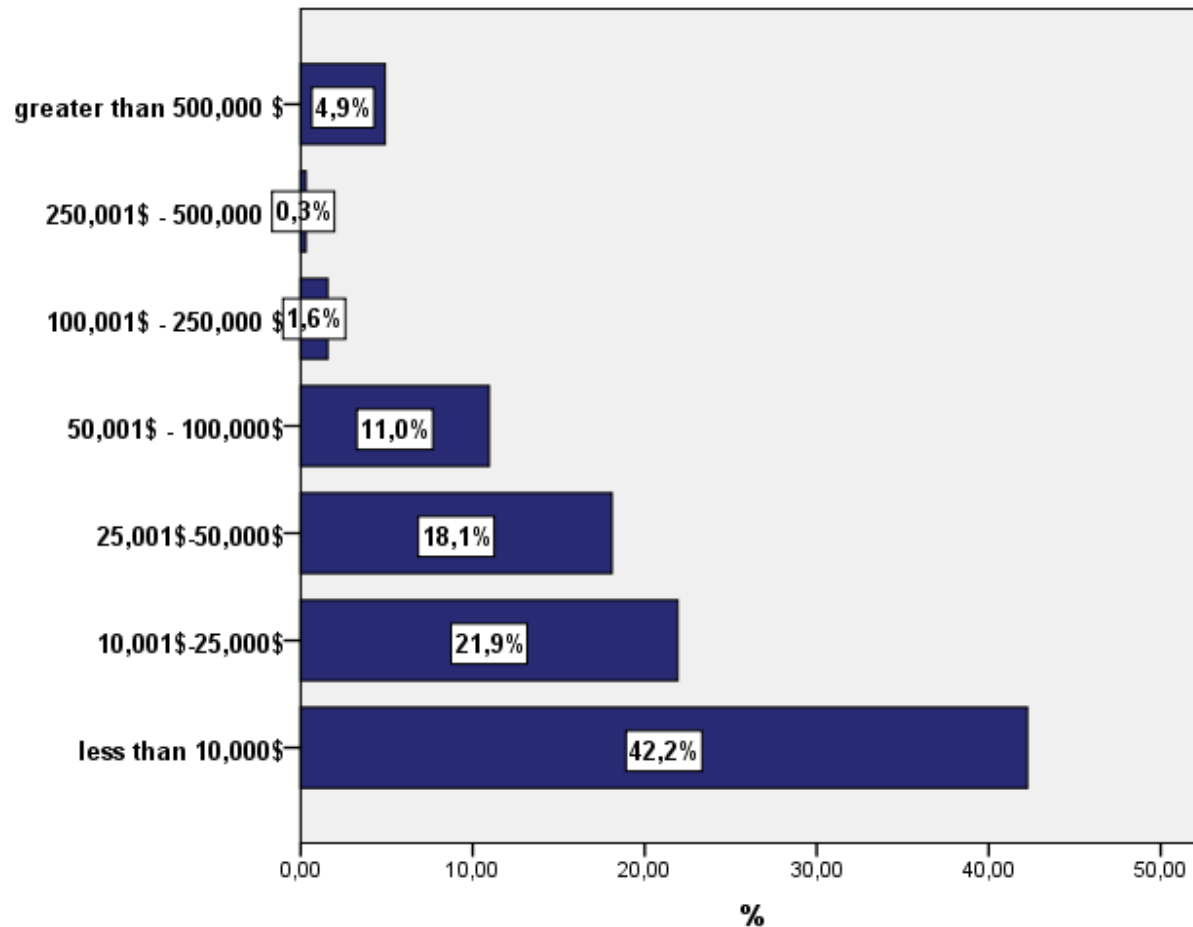
Number of Client Projects 2010



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Budgets 2010

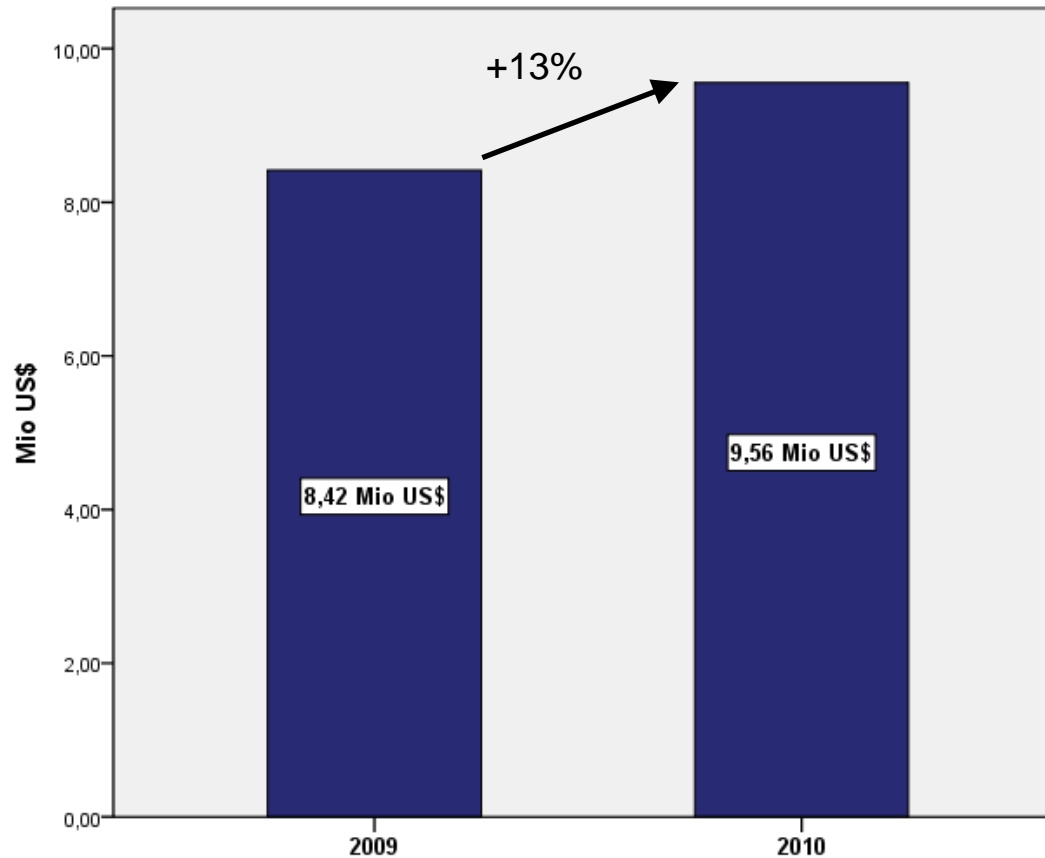
Average share of client projects according to budget size



1US\$ ~ 0,76€ ~ 0,64£

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Comparison 2009 to 2010: Total Revenue Accumulated over all companies in the survey

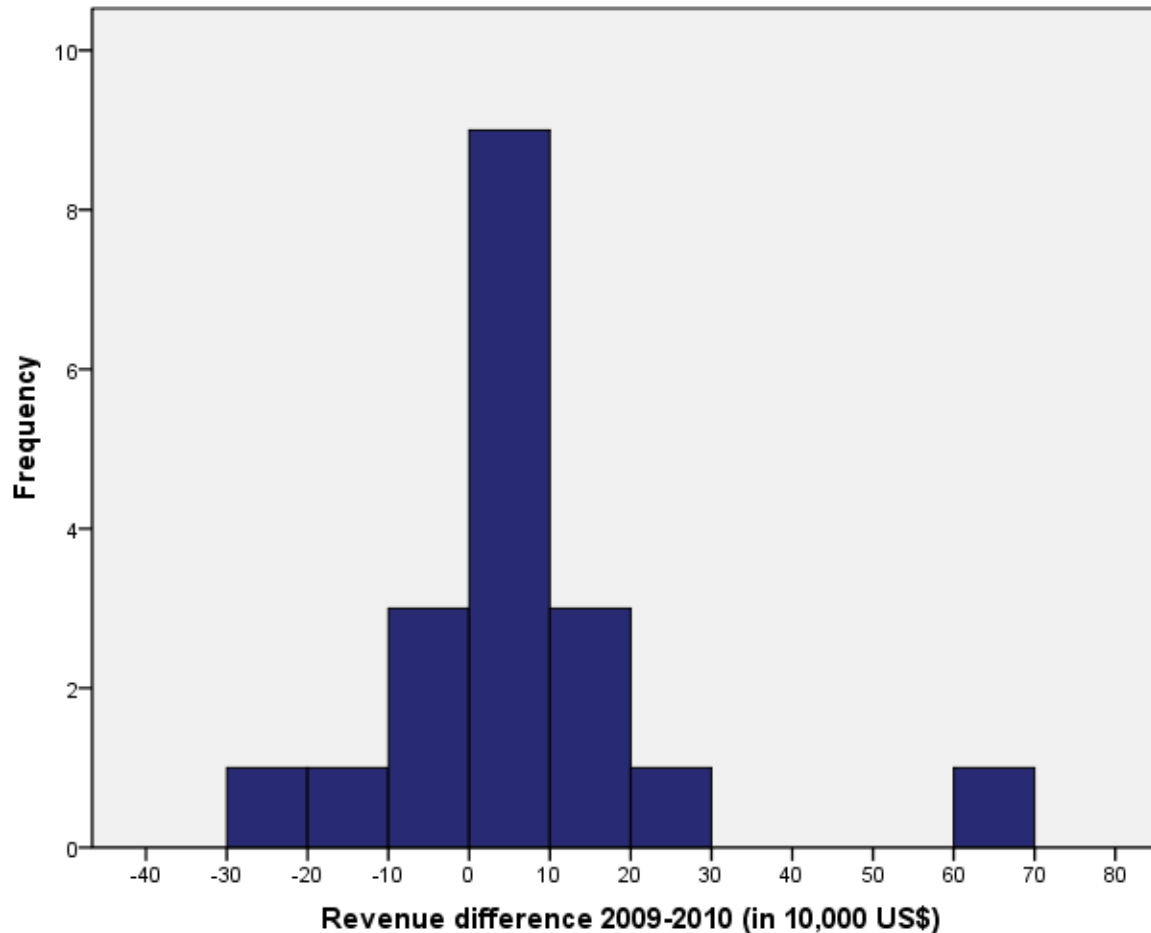


2008-2009: +12%

1US\$ ~ 0,76€ ~ 0,64£

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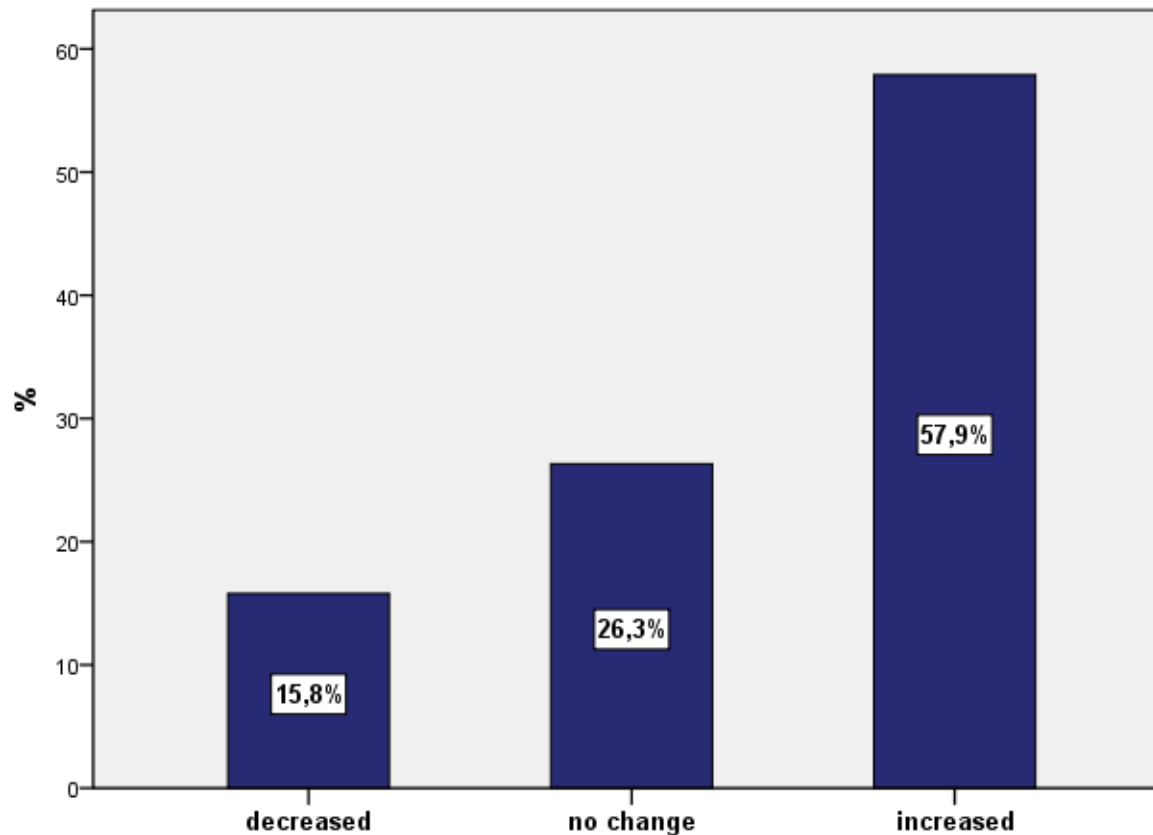
Change of Total Revenue from 2009 to 2010 Distribution of changes (in 10,000 US\$)



1US\$ ~ 0,76€ ~ 0,64£

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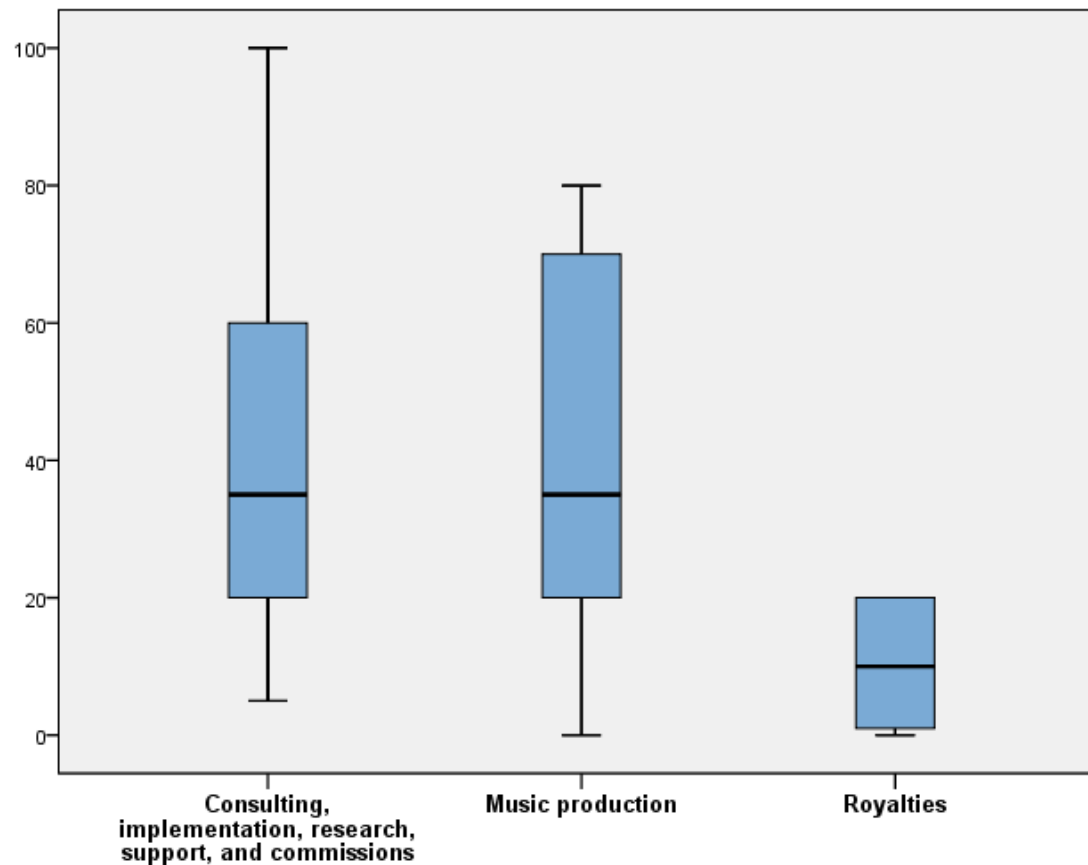
Change of Total Revenue from 2009 to 2010 General tendencies



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Share of Audio Branding Services 2010

Question: How much was the estimated share out of revenue from audio branding services in 2010?



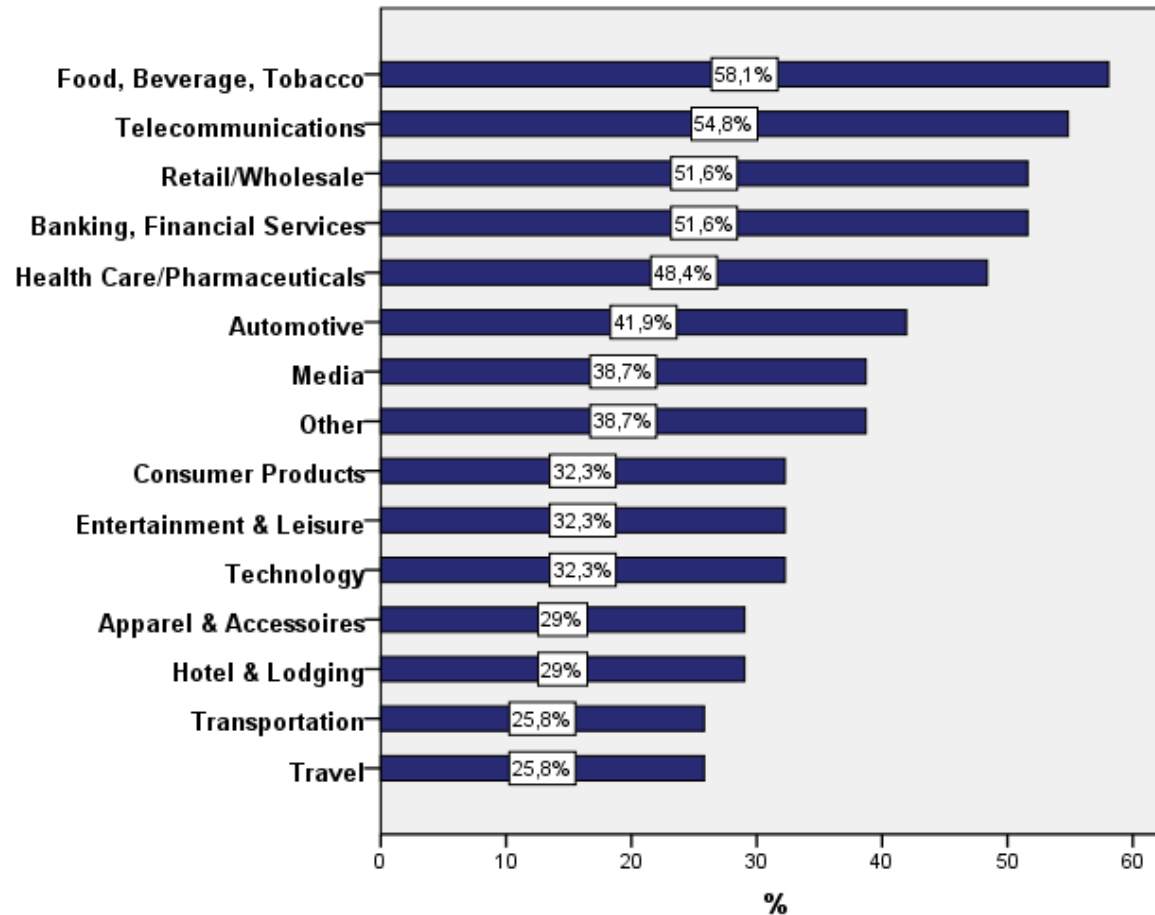
Boxplot

- Thick line: Median
- Blue box: 25%-75% interquartil range IQR
- Whiskers: 1.5 x IQR
- Points: Outliers
- Stars: Extreme outliers

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Client Industries - Part 1/2

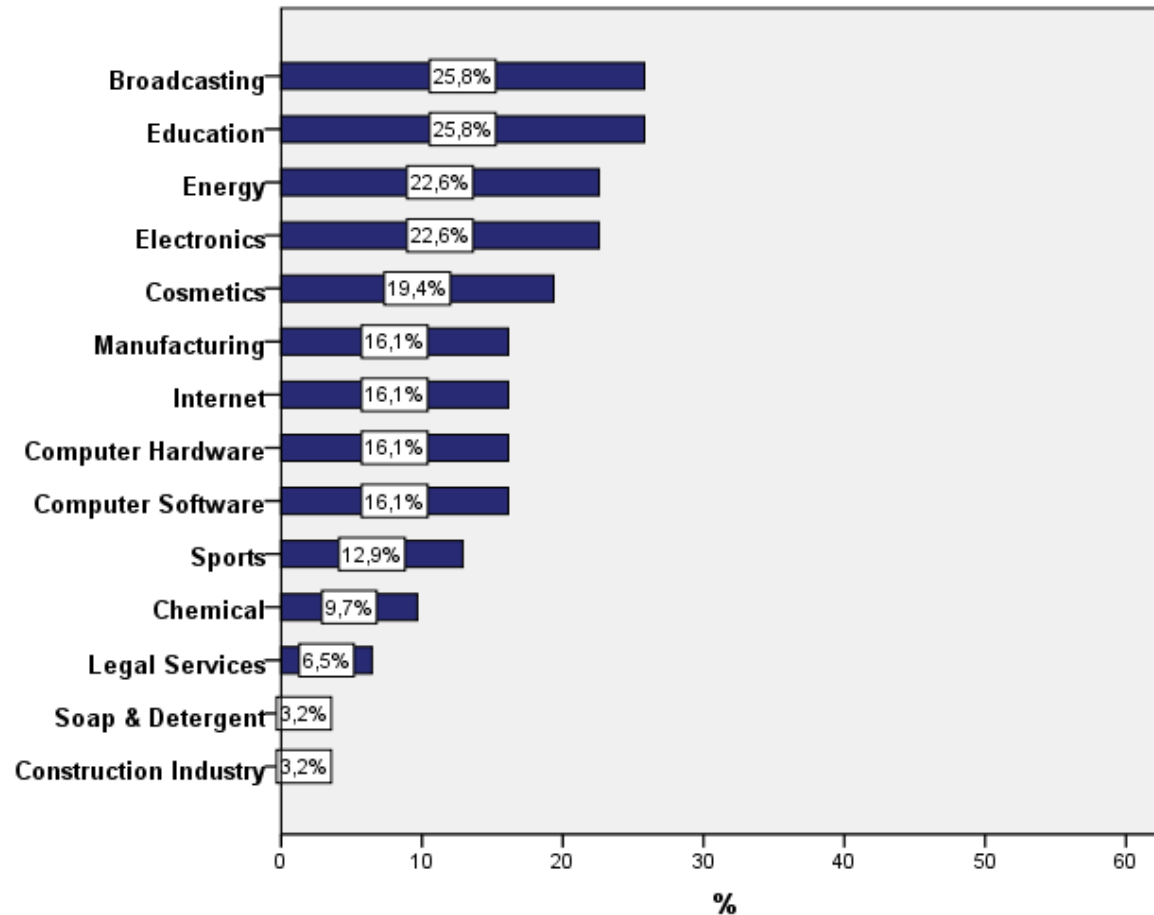
Question: From which industries are the clients?



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Client Industries - Part 2/2

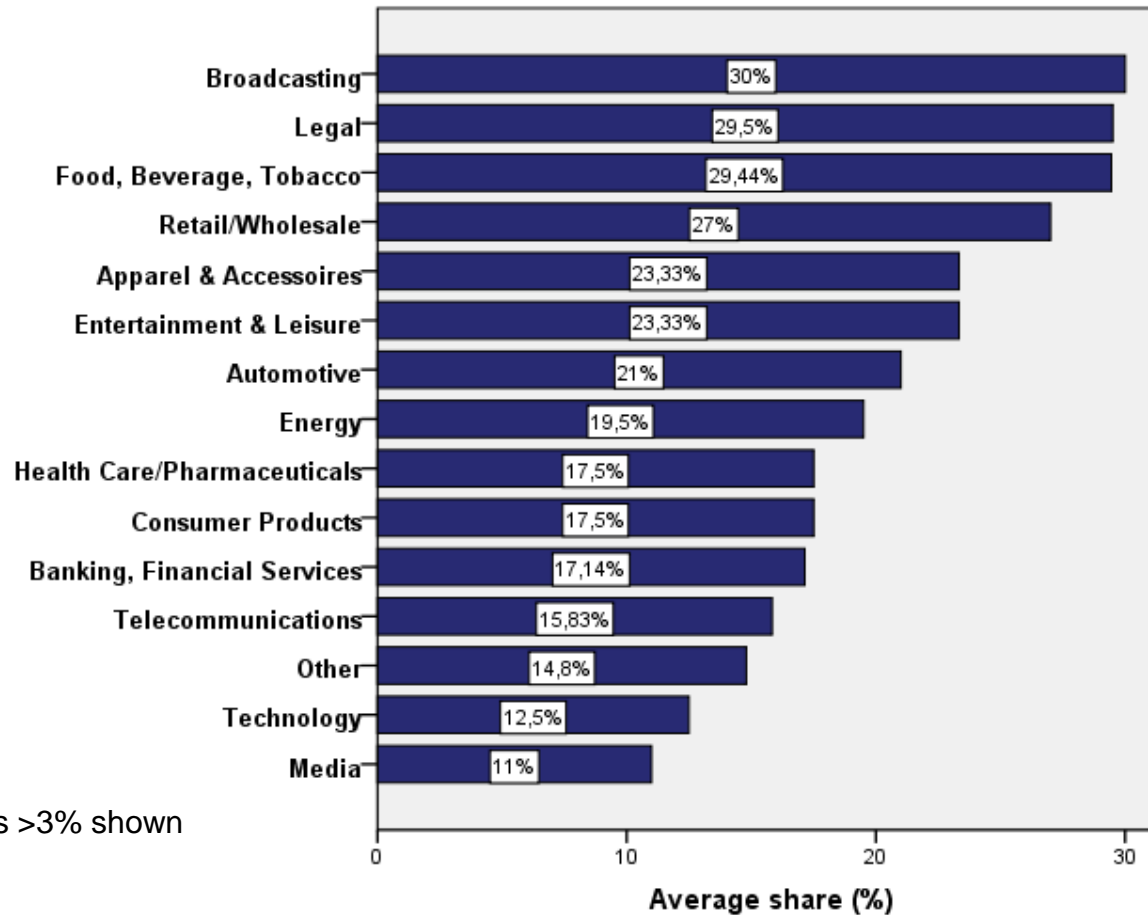
Question: From which industries are the clients?



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Share of Client Industries in 2010

Question: Which industries contributed how much to the revenue of your company?

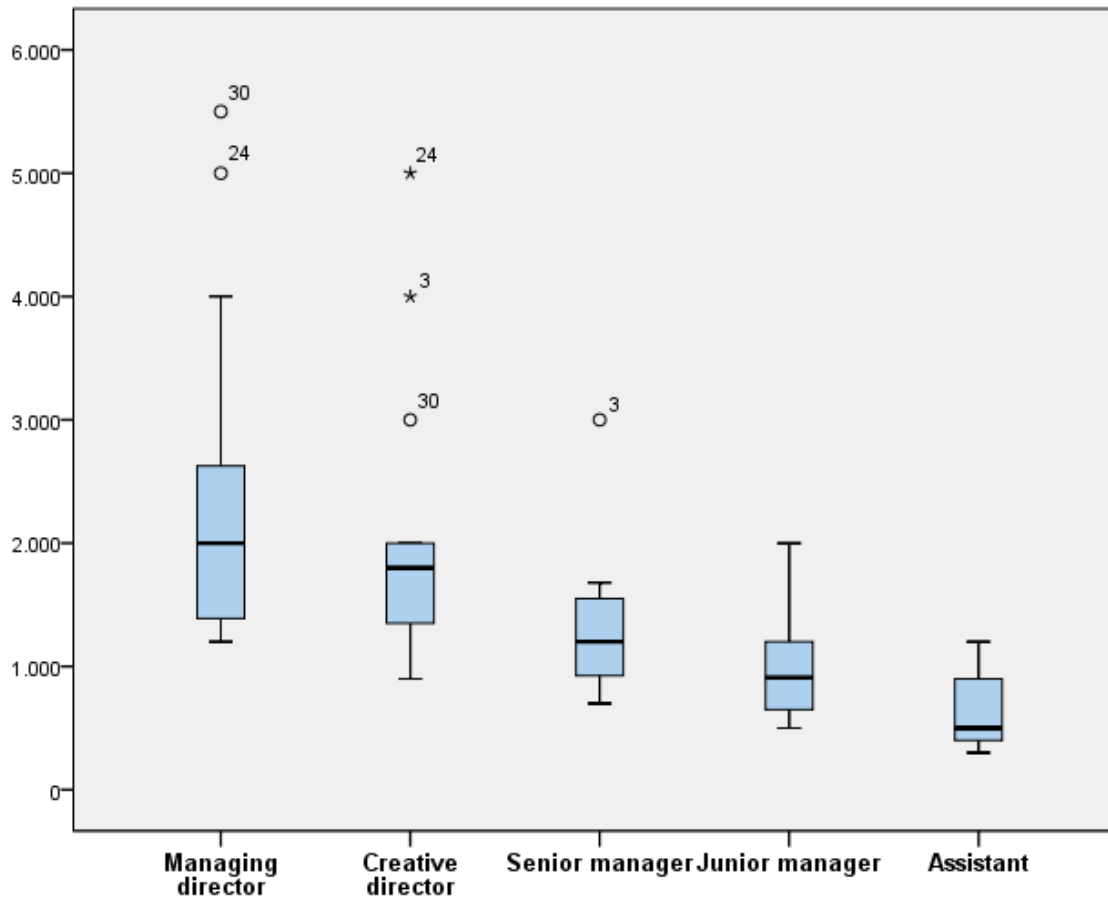


only industries >3% shown

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Daily Rates of Employees

Question: What are your company's current daily rates for...? (US \$)



Boxplot

- Thick line: Median
- Blue box: 25%-75% interquartil range IQR
- Whiskers: 1.5 x IQR
- Points: Outliers
- Stars: Extreme outliers

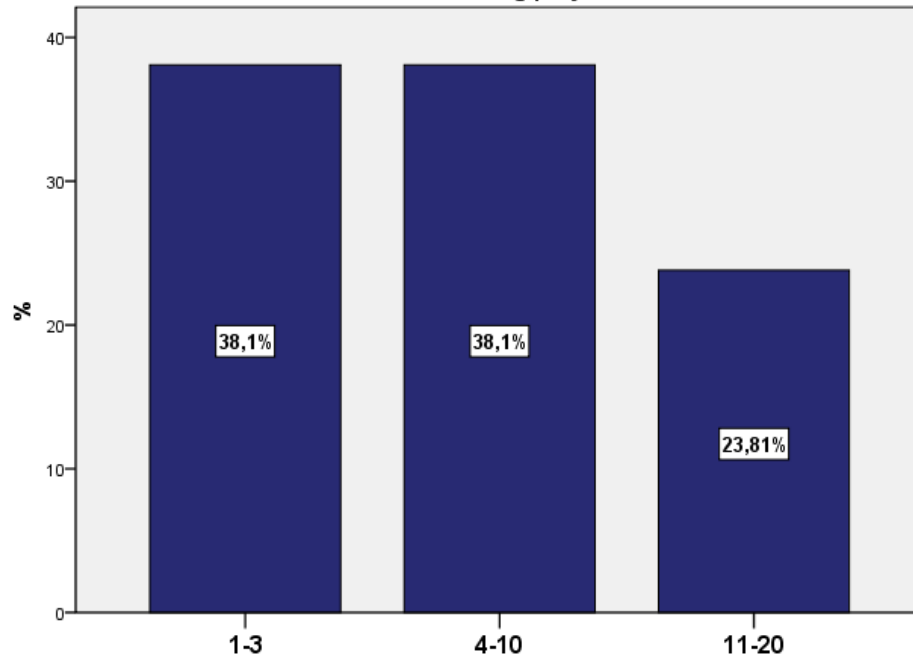
1US\$ ~ 0,76€ ~ 0,64£

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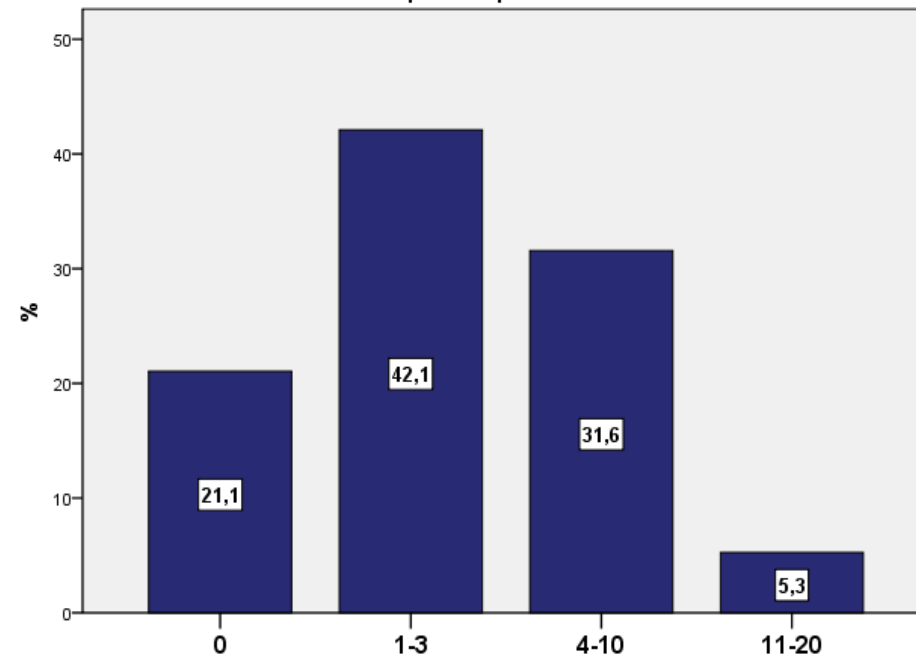
New Audio Branding Projects and Competitive Pitches in 2010

Questions: How many new audio branding projects did you have and how many were competitive pitches?

New audio branding projects



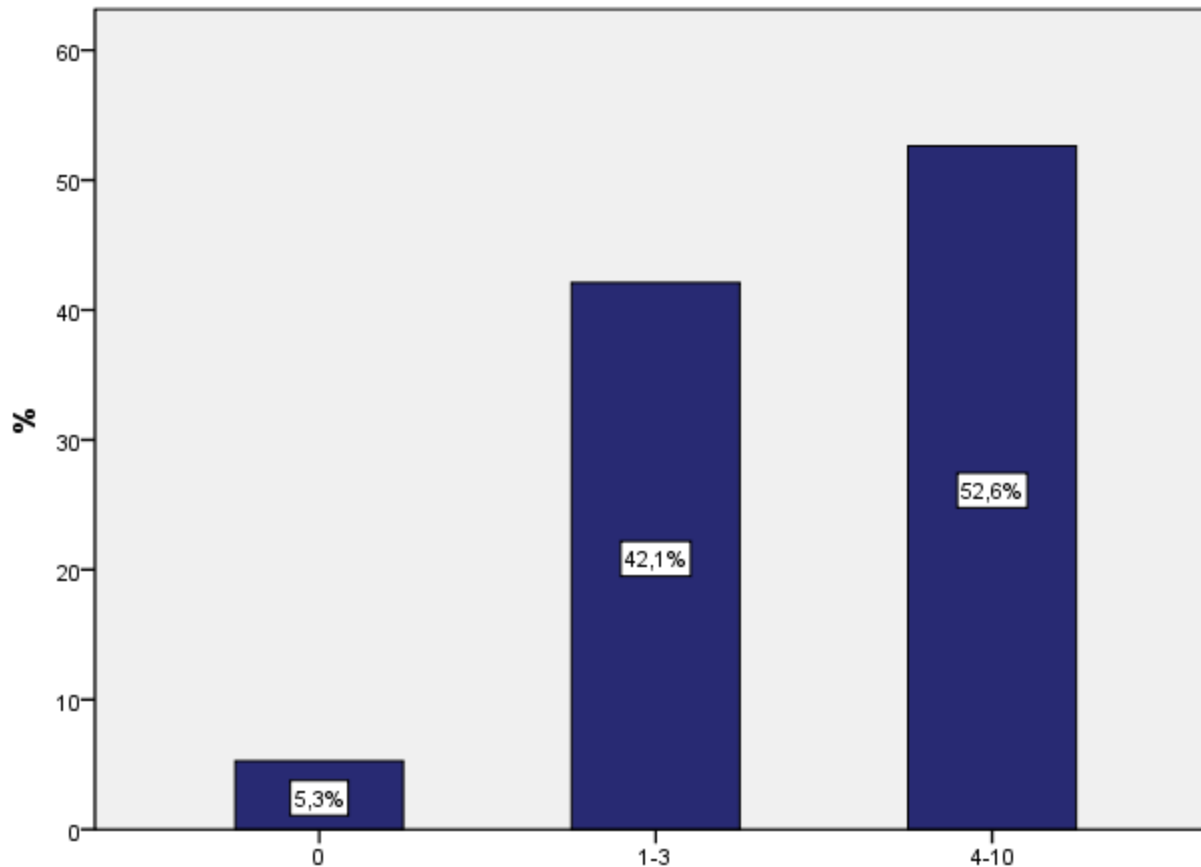
Competitive pitches



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New Business Acquisitions

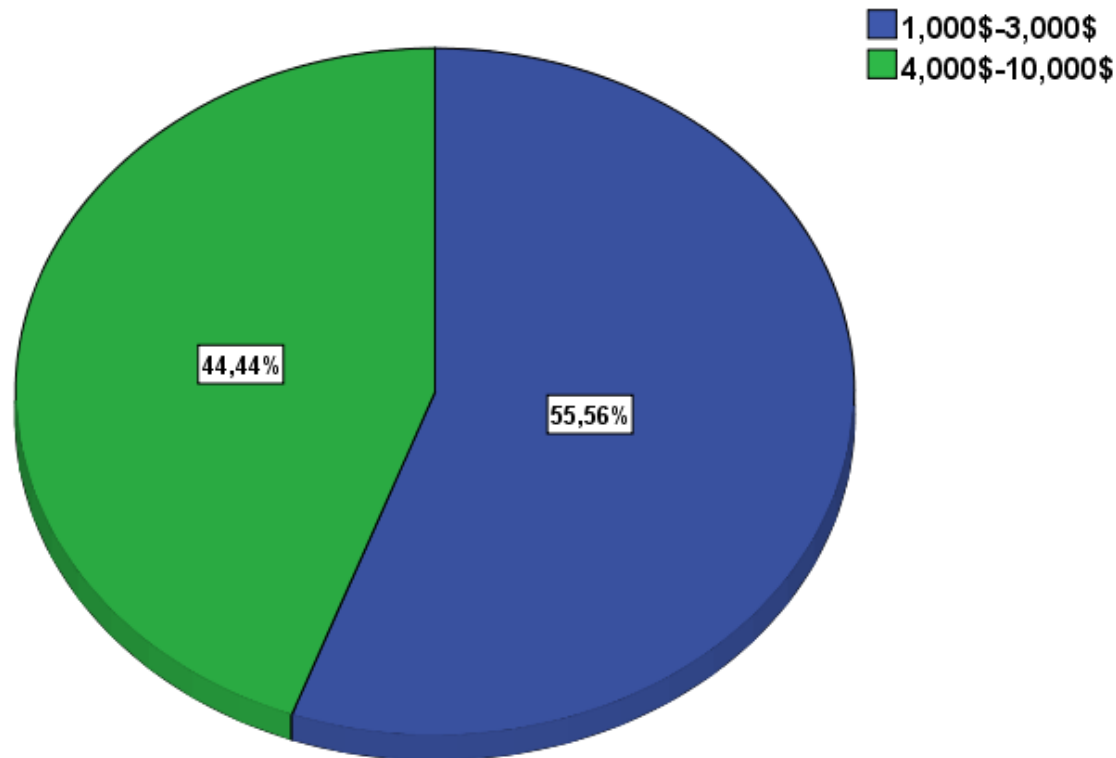
Question: How many successful new business acquisitions did your company obtain in 2010?



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Average Pitch Fees

Question: How much was the average competitive pitch fee in 2010?

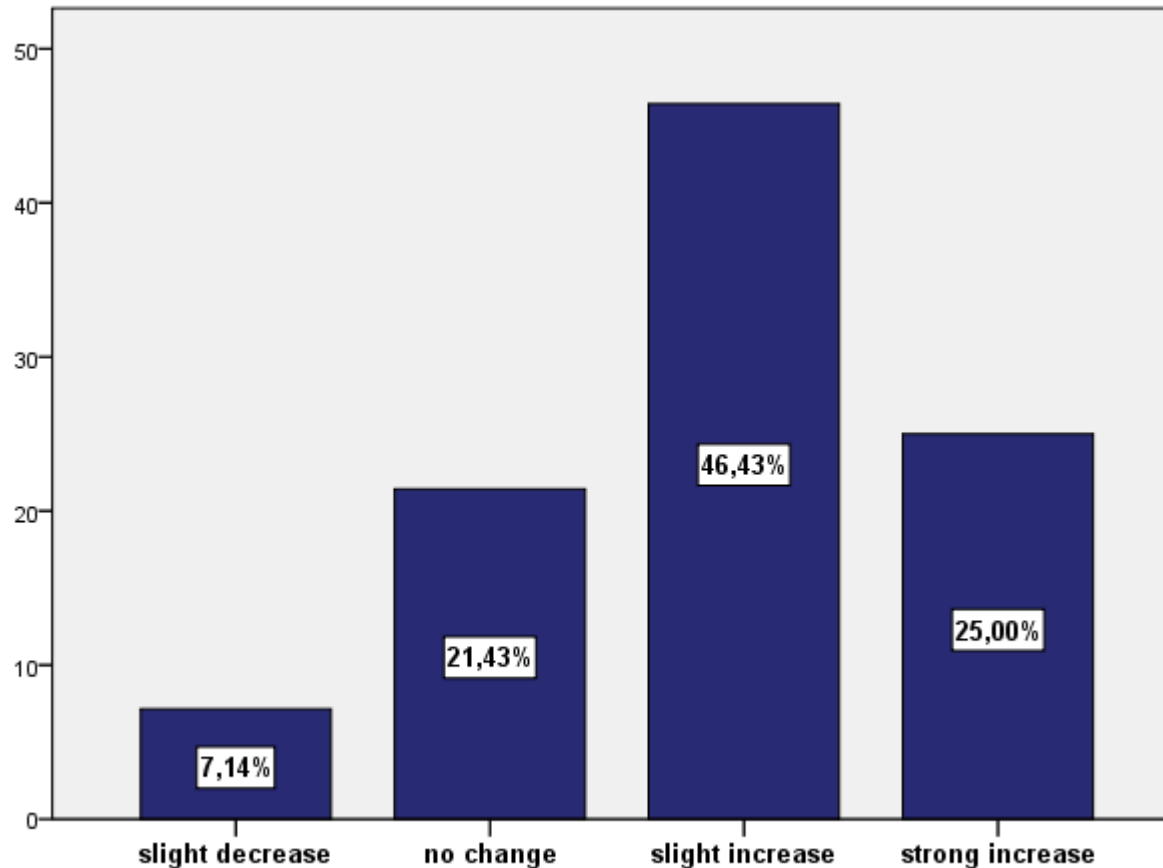


1US\$ ~ 0,76€ ~ 0,64£

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Trends: Development from 2010 to 2011

Question: How has the market for audio branding evolved from 2010 to 2011?

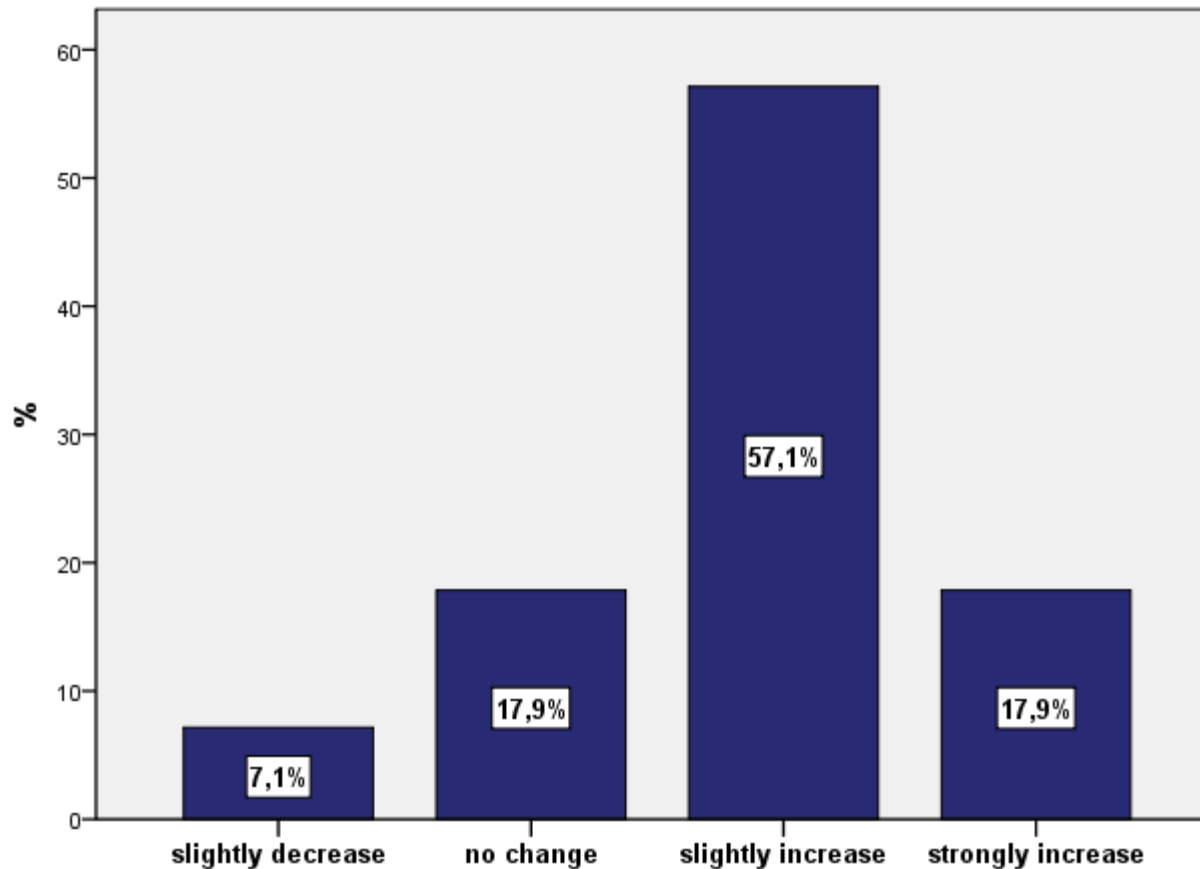


92,3% of the respondents (different sample) in 2010 thought the business will increase in 2011.

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Trends: Outlook 2012

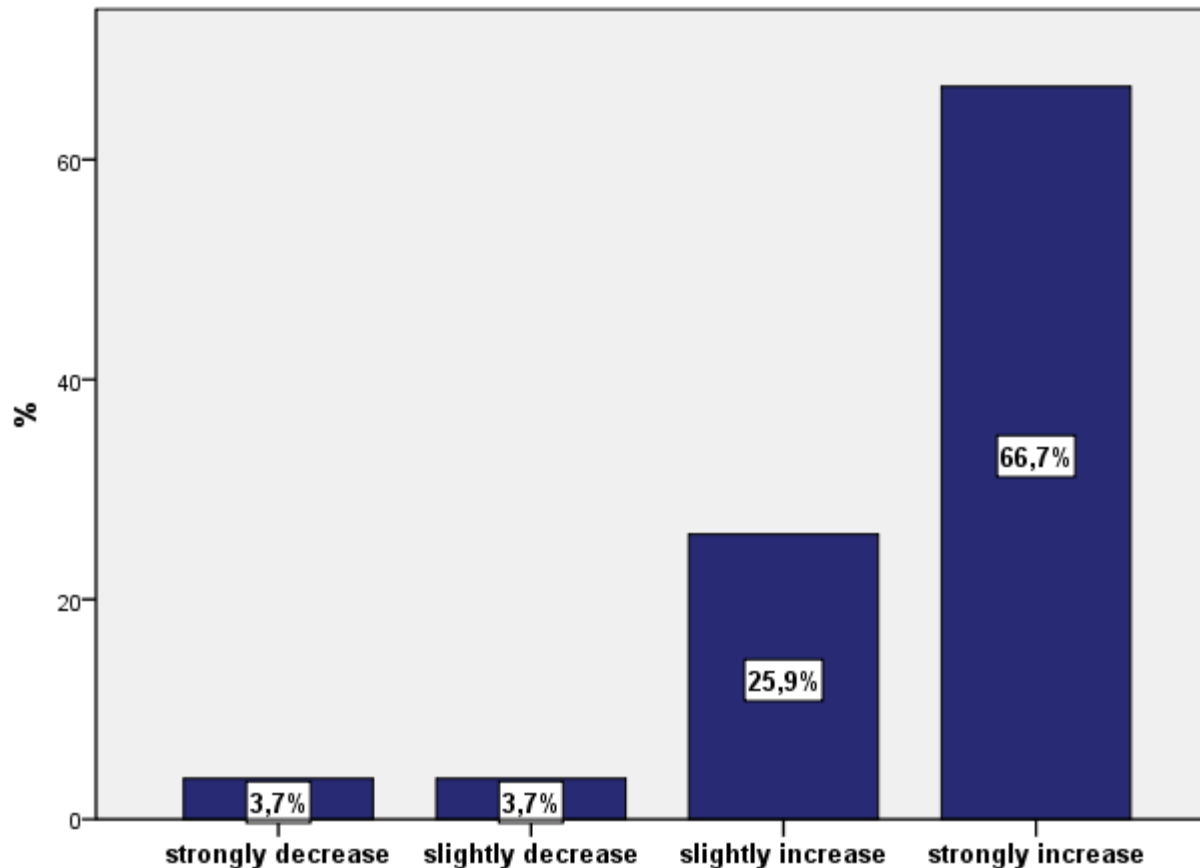
Question: How will the market for audio branding evolve in 2012?



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Trends: In the next 10 years

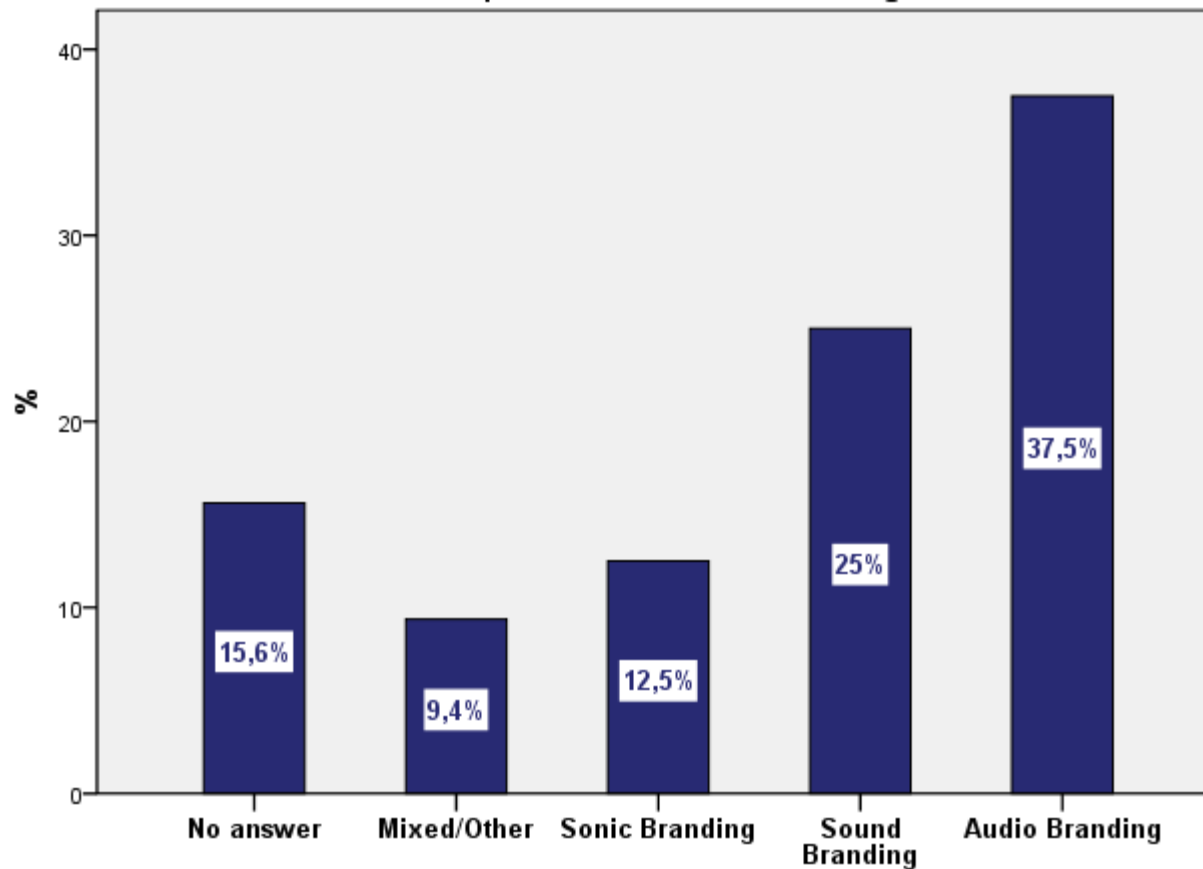
Question: How will the market for audio branding evolve in the next 10 years?



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Terminology

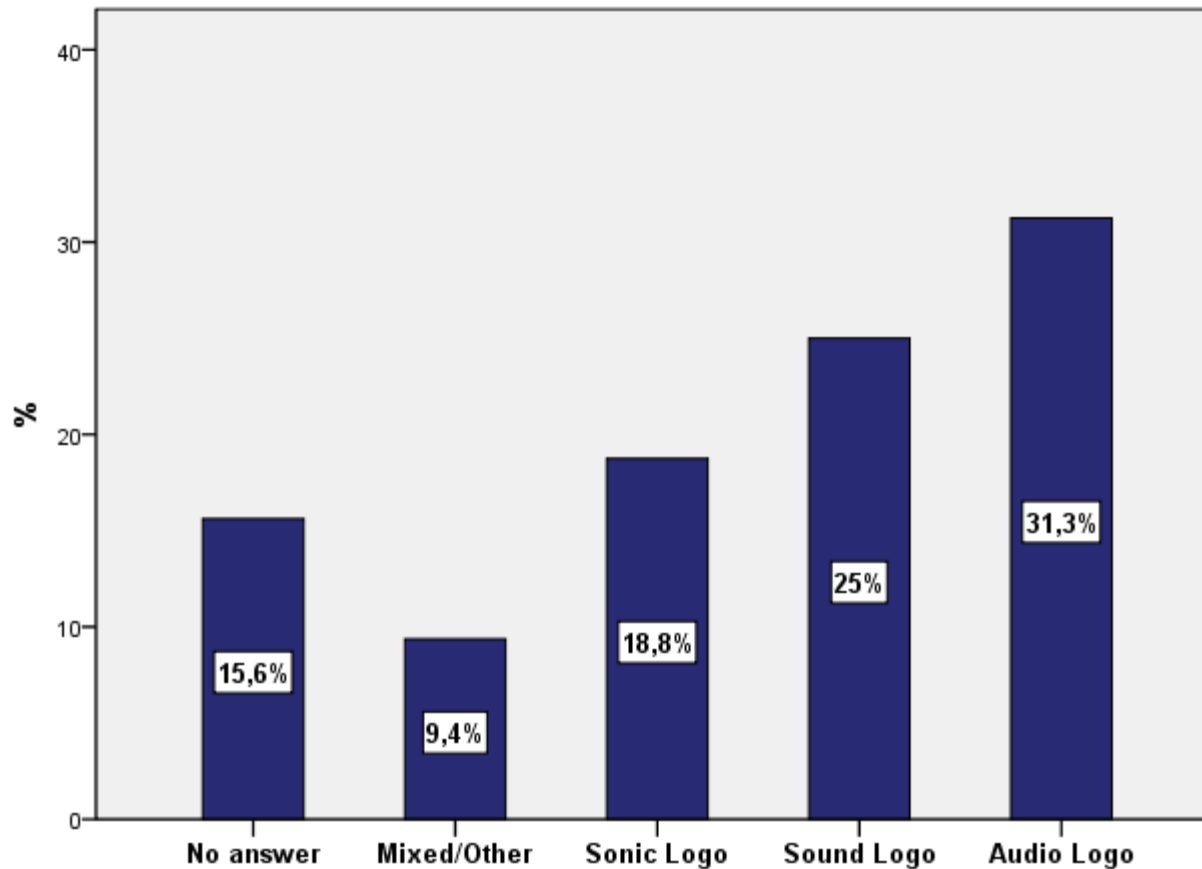
Question: What is the acoustic equivalent of „visual branding“?



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Terminology

Question: What is the acoustic equivalent of „visual logo“?



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Terminology

Definition of audio branding

- Many different approaches
- Focus on process (of branding) or effect (customer interaction)
- Totality of touch points
- Integral part of a coherent brand identity
- Strategic process
- Analogy to the visual domain

„Infusion of logic into the magic of sound“

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Terminology

Sales arguments

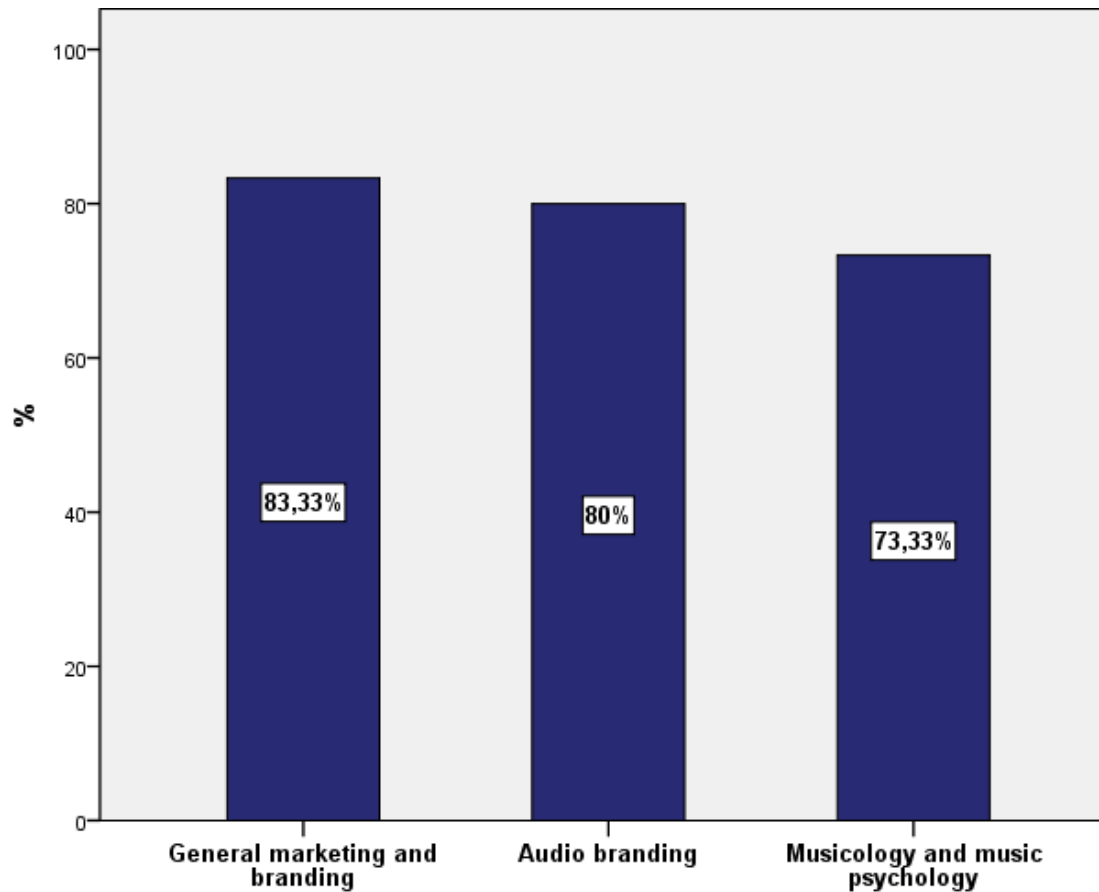
Seven categories of general audio branding sales arguments

1. **Emotional connection** (e.g. “Adds emotion”) 10 cases
2. **Branding** (e.g. “Better branding”) 9 cases
3. **Necessity** (e.g. “Every brand has to communicate with all of senses”) 8 cases
4. **Profit** (e.g. „Audio Branding results in a greater ROI“) 7 cases
5. **Recognition** (e.g. “Can you recognise your brand from the kitchen?”) 7 cases
6. **Competition** (e.g. “Is ahead of the game”) 5 cases
7. **Subliminal** (e.g. “Sound is implicit”) 2 cases

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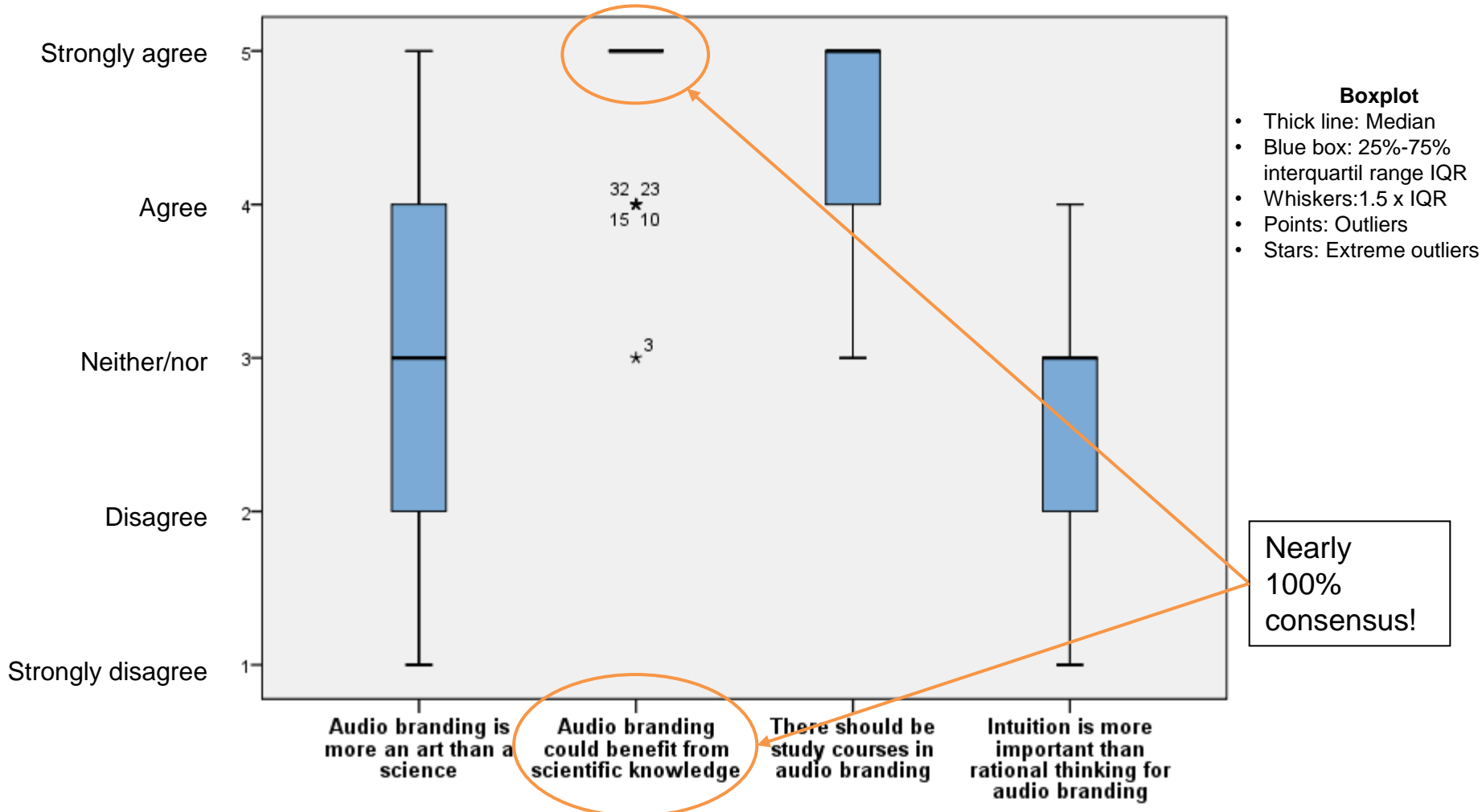
Science

Question: Do you read scientific texts on...?



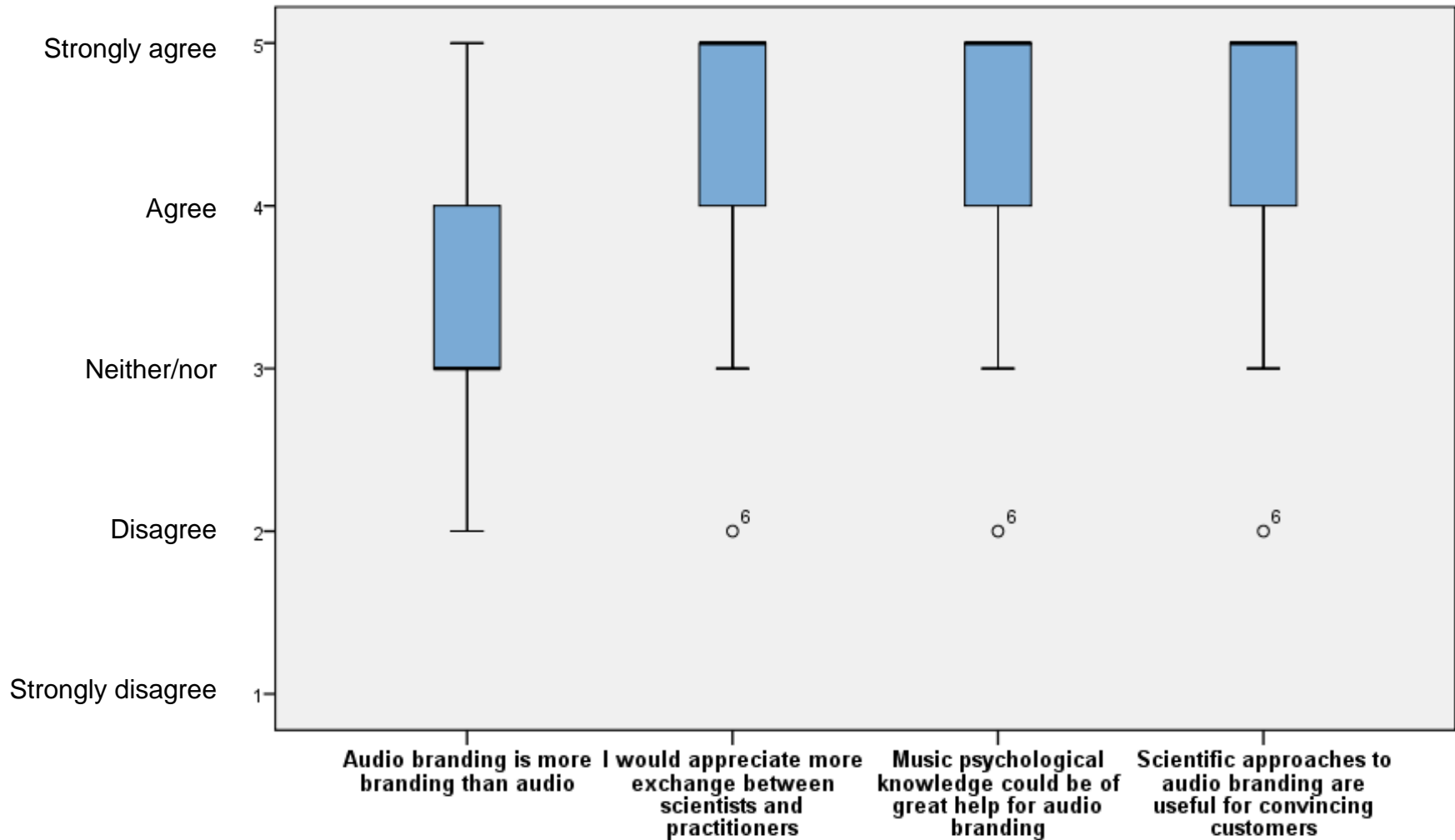
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Science Attitudes Part 1/2



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Science Attitudes Part 2/2



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Science

Summary

- Audio branders are highly interested in scientific matters, approaches, and results, and like to be informed.
- Wide agreement that audio branding could benefit from scientific knowledge.
- Audio branding is rather seen as a rational, logical enterprise, and only partly as an intuitive art.
- There is a desire for more exchange between scientists and practitioners.
- There is a strong need for study courses in audio branding.

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A documentation of the survey will be included in the **Audio Branding Academy Yearbook 2011/2012** to be published beginning 2012

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Thank you for your attention!

