Purpose: Gain valid market data about the audio branding industry as a basis for decision making for both suppliers and demanders of audio branding services.

Population: All professional suppliers of audio branding worldwide

Sampling Method: Multilevel online research. The invitation to the survey was sent to 145 agencies

Sample: 33 decision makers and authorized representatives of agencies from 12 countries

Data Collection: Online questionnaire with controlled anonymous access

Survey Period: September/October 2012

Research Institute: Audio Branding Academy, Hamburg, Germany
Audio Branding Barometer 2012

Company: Type of agency

- **Audio branding agency**: 24
- **Advertising agency**: 4
- **Consultancy**: 1
- **Design agency**: 1
- **Music production**: 2
- **Other**: 4

December 10, 2012
Audio Branding Barometer 2012

Company: Location

- Germany: 10
- USA: 5
- Brazil: 3
- UK: 3
- Italy: 2
- Sweden: 2
- India: 2
- Denmark: 2
- Other: 4

Count
Audio Branding Barometer 2012

Company: Number of employees

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Company: Year of foundation

When was the company founded?

- before 1990: 3
- 1996-2000: 1
- 2001-2005: 10
- 2006-2010: 12
- 2011-present: 6

Count

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Company: Services

- Music production: 97%
- Strategy consulting: 97%
- Development of concepts: 93.9%
- Musical composition: 96.9%
- Supervision of implementation: 81.8%
- Rights clearing and licensing: 60.6%
- Technical support: 54.6%
- Other: 51.5%
- Monitoring of sound applications: 48.6%
- Market research: 42.4%
- Quality management: 39.4%
- Supply of technical and audio hardware: 12.1%
Audio Branding Barometer 2012

Company: Strategic planning

![Bar chart showing count of Yes and No responses for Strategic Planning]

- Yes: 29
- No: 4

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Company: Part of network

![Graph showing the number of companies that are part of a network vs those that are not. The graph indicates a significant difference in count between the two categories, with most companies not being part of a network.]
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Revenue: Delivered audio branding elements 2011

- Audio logo: 12.5%
- Soundscape: 11.8%
- Music on hold: 6.9%
- Brand voice: 7.9%
- Brand song: 6.9%
- Jingle: 6.9%
- Music for industry films: 6.0%
- Corporate anthem: 5.4%
- Other: 4.5%
- Music for commercials: 5.3%
- Sound Icons: 4.0%

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Revenue: Number of client projects 2011
Audio Branding Barometer 2012

Revenue: Project budget sizes 2011

- <10,000$: 52.5%
- 10,000$-25,000$: 18.3%
- 25,001$-50,000$: 16.8%
- 50,001$-100,000$: 7.6%
- >500,000$: 7.6%
- 100,001$-250,000$: 4.5%
- 250,001$-500,000$: 1.3%

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Audio Branding Barometer 2012
Revenue: Change 2010-2011

Mean = 42.7%
Sd = 69.3%
Median = 31.7%

1US$ ~ 0.76€ ~ 0.64£
Audio Branding Barometer 2012

Revenue: Share of audio branding services 2010/2011

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Revenue: Shares by type of service

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Audio Branding Barometer 2012

Revenue: Client industries

- Banking, Financial Services
- Automotive
- Health Care/Pharmaceuticals
- Food, Beverage, Tobacco
- Retail/Wholesale
- Telecommunications
- Transportation
- Entertainment & Leisure
- Consumer Products
- Media
- Energy
- Other
- Broadcasting
- Cosmetics
- Technology
- Internet
- Hotel & Lodging
- Electronics
- Apparel & Accessories
- Travel
- Sports
- Education
- Construction Industry
- Manufacturing
- Computer Hardware
- Computer Software
- Chemical
- Soap & Detergent
- Legal Services

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Revenue: Daily rates

December 10, 2012

Median: 1500$  1500$  1250$  800$  600$
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New Business: New audio branding projects 2011

How many new business projects did you have in 2011 for audio branding?

- 0: 1
- 1-3: 6
- 4-10: 13
- 11-20: 1
- 21-50: 2
- 51+: 2
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New Business: Competitive pitches 2011

[Bar chart showing the number of competitive pitches for new business projects in 2011.]

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New Business: Average pitch fees 2011
Audio Branding Barometer 2012

New business: Acquisitions 2011

How many successful new business acquisitions did you obtain in 2011?
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Trends: Last year

How has the market for audio branding evolved from 2011 to 2012?

- Slight decrease: 2
- No change: 7
- Slight increase: 18
- Strong increase: 5

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Audio Branding Barometer 2012

Trends: Next year

![Bar chart showing the expected market evolution for audio branding in 2013 with counts for slight decrease, no change, slight increase, and strong increase.]
Audio Branding Barometer 2012
Trends: 10 years

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

- Slight decrease: 1
- No change: 1
- Slight increase: 10
- Strong increase: 24

Count
Audio Branding Barometer 2012

Terminology: Branding

![Bar Chart]

- Sound Branding: 16
- Audio Branding Sonic Branding: 2
- Acoustic Branding: 3
- Other: 3
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Terminology: Logo

Count

Sound Logo  Audio Logo  Sonic Logo  Other

Visual Logo

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Terminology: Logo by language
Audio Branding Barometer 2012

Terminology: Branding by language
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Definition Audio Branding: Wordle

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Audio Branding Barometer 2012
Definition Audio Branding: Summary

• 32 definitions of audio branding
• Converging consensus
• Key elements:
  – Explicit reference to branding („Translating brand values into sound“)
  – Subtypes: „Brand enhancement“ or „Integral part of holistic branding“
  – Alternatively: „Sound communication“ (no reference to branding)
  – „Consistency“, „Strategic Orientation“ often emphasised
  – Only two definitions use still the visual analogy
  – Branding conceived as process, not as products or deliverables
  – Important: „Multisensorial“ and „Across touchpoints“
• Quote:

  The real “bass” to the brand
Audio Branding Barometer 2012
Selling Arguments: Part 1

• Participants delivered 136 selling arguments
• Manual clustering and categorisation

• **Branding** (63 cases)
  – Holistic branding („Make your values heard“), 24 cases
  – Differentation („Corporate Sound helps brand uniqueness“), 12 cases
  – Multisensory („Your brand is experienced in five senses, not one“), 6 cases
  – Identity („Music/sound clarifies your brand identity“), 6 cases
  – Recognition, 7 cases
  – Recall, 4 cases
  – Strategic, 4 cases
Audio Branding Barometer 2012
Selling Arguments: Part 2

- **Emotion** (19 cases)
  - Emotional connection (12 cases)
  - Engagement/Experience (7 cases)
- **Profit** (17 cases)
  - Return on Investment („Good sound increases sales“), 10 cases
  - Efficiency, 7 cases
- **Audio specific** („People can stop seeing, but not stop hearing“), 4 cases
- **Consistency across touchpoints**, 4 cases
- **Trendy** („Necessity for forward-thinking brands“), 3 cases
- **Others** („It's magic“, „story telling“, „scientific research driven“ etc.), 18 cases
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Selling Arguments: Top 4

1. Holistic branding (24 cases)
2. Emotional Connection (12 cases)
3. Differentation (12 cases)
4. Return on Investment (10 cases)
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Imprint

A documentation of the survey will be included in the Audio Branding Academy Yearbook 2012/2013 to be published beginning 2013

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Thank you for your attention!