Audio Branding Barometer 2013
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Overview

**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:** 23 decision makers and authorized representatives of agencies from 13 countries

**Data Collection:** Online questionnaire with controlled anonymous access

**Survey Period:** July/August 2013

**Research Institute:** Audio Branding Academy, Hamburg, Germany
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Company: Type of agency

- Audio branding agency: 18
- Advertising agency: 2
- Music production: 2
- Other: 2
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Country: Germany, Europe (other), USA, other, South America, UK, France

Count: 6, 5, 4, 2, 2, 2, 2
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Company: Number of employees

![Bar chart showing the number of employees in permanent positions by size categories: 0-3 (7), 4-10 (11), 11-20 (2), 21-100 (2), >100 (1).]
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Company: Year of foundation


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Company: Offered services

- Musical composition: 100%
- Music production: 95.7%
- Strategy consulting: 95.7%
- Development of concepts: 87%
- Supervision of implementation: 82.6%
- Rights clearing and licensing: 73.9%
- Technical support: 65.2%
- Market research: 65.2%
- Monitoring of sound applications: 65.2%
- Quality management: 68.0%
- Other: 34.8%
- Supply of technical and audio hardware: 21.7%
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Business: Delivered audio branding elements 2012

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Business: Project budget sizes 2012
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Business: Change of revenue 2011-2012 (total sum)

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1US$ ~ 0,76€ ~ 0,64₤
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Business: Share of audio branding services 2011/2012

Boxplot
Middle line: Median.
Box: 25-75% quartiles.
Points: Outliers
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Business: Shares by type of service

Boxplot
Middle line: Median.
Box: 25-75% quartiles.
Points: Outliers
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Business: Client industries (by type)

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

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Business: Daily rates

Boxplot
Middle line: Median.
Box: 25-75% quartiles.
Points: Outliers

Median: 1.550 $

Manager director: 1.200 $
Creative director: 1.000 $
Senior manager: 550 $
Junior manager: 500 $
Assistant: 500 $
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New Business: New audio branding projects 2012

How many new business acquisitions for audio branding did you have in 2012?

- 1-3: 5
- 4-10: 15
- >10: 1

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New Business: Competitive pitches 2012

How many of these new business acquisitions were competitive pitches?

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New Business: Average pitch fees 2012

How much was the average competitive pitch fee in 2012?
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New Business: Acquisitions 2012

How many of your new business acquisitions in 2012 were successful and became paid client projects?

- 0: 3
- 1-3: 0
- 4-10: 10
- >10: 1
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Trends: Last year

How has the market for audio branding evolved from 2012 to 2013?

- Slight decrease: 2
- No change: 9
- Slight increase: 8
- Strong increase: 4

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Trends: Next year

How will the market for audio branding evolve in 2014?

- Slight decrease: 1
- No change: 2
- Slight increase: 14
- Strong increase: 5
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Trends: 10 years

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

- Slight decrease: 1
- Slight increase: 7
- Strong increase: 15
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Terminology: visual branding equivalent

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Terminology: visual logo equivalent

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Terminology: visual corporate design equivalent
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Sales arguments: part 1

- Participants delivered 89 selling arguments
- Manual clustering and categorization

- **Profit** (17 cases)
  - Return on Investment („ROI, a lot for very little money“), 14 cases
  - Efficiency („Increase productivity“), 4 cases

- **Branding** (31 cases)
  - Branding general („Being part of the brand experience“), 12 cases
  - Recognition, 8 cases
  - Awareness, 6 cases
  - Differentiation, 5 cases
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Sales arguments: part 2

• **Emotion** (15 cases)
  – Emotional connection (9 cases)
  – Customer Engagement/Experience (6 cases)

• **Audio specific** („You cannot close your ears“), 4 cases

• **Consistency**
  – General, 5 cases
  – Across touch-points and channels, 4 cases
  – Enhancing visual, 4 cases

• **Control** (“Objective decision with regard to brand-fit, no personal taste”), 4 cases

• **Easy to use**, 3 cases

• **Mitigation of legal risks**, 1 case
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Sales arguments: top 4

1. Return on Investment (14 cases)
2. Branding (12 cases)
3. Emotional Connection (9 cases)
4. Recognition (8 cases)
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Quality criteria

We asked to rate 26 quality criteria according to their importance for audio branding (1 = Very unimportant, 5 = Very important)

<table>
<thead>
<tr>
<th>Criterion</th>
<th>MEAN</th>
<th>SD</th>
<th>Criterion</th>
<th>MEAN</th>
<th>SD</th>
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</thead>
<tbody>
<tr>
<td>Brand fit</td>
<td>4,70</td>
<td>0,635</td>
<td>Aesthetics</td>
<td>3,95</td>
<td>0,686</td>
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<td>Consistency</td>
<td>4,61</td>
<td>0,499</td>
<td>Cross-cultural applicability</td>
<td>3,91</td>
<td>0,668</td>
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<tr>
<td>Recognizability</td>
<td>4,43</td>
<td>0,788</td>
<td>Activating</td>
<td>3,89</td>
<td>0,900</td>
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<tr>
<td>Authenticity</td>
<td>4,38</td>
<td>0,865</td>
<td>Conciseness</td>
<td>3,70</td>
<td>0,733</td>
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<tr>
<td>Ownability</td>
<td>4,36</td>
<td>0,727</td>
<td>Simplicity</td>
<td>3,61</td>
<td>0,988</td>
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<tr>
<td>Memorizability</td>
<td>4,35</td>
<td>0,775</td>
<td>Familiarity</td>
<td>3,39</td>
<td>0,988</td>
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<td>Production quality</td>
<td>4,30</td>
<td>0,765</td>
<td>Melodiousness</td>
<td>3,23</td>
<td>1,066</td>
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<tr>
<td>Flexibility</td>
<td>4,13</td>
<td>0,815</td>
<td>Pleasantness</td>
<td>3,23</td>
<td>0,869</td>
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<tr>
<td>Functionality</td>
<td>4,13</td>
<td>0,869</td>
<td>Subliminality</td>
<td>3,14</td>
<td>1,108</td>
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<tr>
<td>Distinctiveness</td>
<td>4,09</td>
<td>0,793</td>
<td>Novelty</td>
<td>3,00</td>
<td>0,976</td>
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<tr>
<td>Protectability</td>
<td>4,00</td>
<td>0,953</td>
<td>Sophistication</td>
<td>3,00</td>
<td>1,024</td>
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<tr>
<td>Emotionality</td>
<td>3,95</td>
<td>0,785</td>
<td>Non-obtrusiveness</td>
<td>2,85</td>
<td>0,933</td>
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<tr>
<td>Sustainability</td>
<td>3,95</td>
<td>0,950</td>
<td>Trendiness</td>
<td>2,23</td>
<td>0,922</td>
</tr>
</tbody>
</table>

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Opportunities: most promising future fields of application

Mobile Apps: 14
Point of Sale: 8
Web: 5
TV Spots: 4
Advertising: 3
User Interface: 3
Physical Environments: 2
Radio: 2
Games: 2
Digital Media: 2

Further:
Branded Content, Electromobile, Street Marketing, Audio visual media, Home and kitchen devices, Licensing, Integrated campaigns, Corporate, Soundscapes (sonorisation), Sponsorship, Technical products/gadgets, Personalisation, Call Centres, Artist Cooperations, Brand rooms, Cost Control

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Opportunities: Most promising national markets

Countries

- Germany: 5
- USA: 5
- UK: 3
- Argentina: 1
- Brazil: 1
- China: 1
- India: 1
- Japan: 1
- Sweden: 1
- Switzerland: 1

Continents

- Europe: 13
- Asia: 8
- North America: 5
- South America: 5

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Top Audio Brands

What are the world's leading brands with the best brand sound?

1. Intel
   - Score: 13
2. Audi
   - Score: 11
3. Coca-Cola
   - Score: 10
4. Deutsche Telekom
   - Score: 7
5. McDonald's
   - Score: 5
6. Nokia
   - Score: 5
7. Apple
   - Score: 4
8. BMW
   - Score: 4
9. 20th Century Fox
   - Score: 2
10. Mercedes-Benz
    - Score: 2
11. MGM
    - Score: 2
12. Yahoo!
    - Score: 2

Further:
Amex, Aspirin, AT&T, British Airways, Christmas Bells, Danone, Deutschland Radio, Direct Line, Disney, Ford, Hornbach, Itaú, James Bond, Lufthansa, Maersk Line, NBC, Nestlé, Playstation, Samsung, Santander, SNCF (French), THX, VW, Windows

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A documentation of the survey will be included in the Audio Branding Academy Yearbook 2013/2014 to be published in spring 2014

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Thank you for your attention!