

_best
AUDIO BRANDS



www.bestaudiobrands.com

WELCOME TO BEST AUDIO

BRANDS 2019: the first worldwide ranking of sonic identities

WE ARE ENTERING THE GOLDEN AGE OF

AUDIO. Brands have begun to think seriously about how they sound and are making serious efforts to create audio assets that will enhance their communications.

We've taken the opportunity to objectively and comprehensively evaluate audio brands based on measured KPIs and estimated return-on-investment, because just like visual branding, Sonic Identities are assets that require strategic thought and investment.

The rise of voice applications, growing use of owned media productions and new audio products, suggest that brands should take a closer look at the way sonic identities are developed and implemented.

To ensure our Best Audio Brands Ranking 2019 is as

comprehensive in scope and analysis as possible, we partnered with two key players in media and brand communication: Storyclash, who provided insights on social trends in real-time, and Veritonic, an AI-based audio effectiveness testing company. Who are the top performers? What are the best audio strategies? And what can we learn from this first global ranking? On behalf of amp, we wish you an enjoyable read.

Sincerely yours,

MICHELE ARNESE

Global CEO & Creative Director

ULI REESE

Global Chief Marketing Officer



_THE IDEA BEHIND THIS RANKING and the team of experts who created it

_THE POET AND ACADEMIC HENRY WADSWORTH LONGFELLOW once remarked that “music is the universal language of mankind”¹.

The idea that music affects everyone in some way or another is a universal truth - all human societies have been found to include music within their culture². We use music as much as any other media, to express our individuality and as an extension of ourselves and so should brands. With the growing importance of interactive voice technology and a myriad of digital and physical touchpoints, brands are increasingly looking towards sonic branding to enhance their communication by building strong emotional connections and trust.

If employed strategically, audio has the power to express a brand's personality while being instantly recognisable across all channels. To successfully leverage the benefits of sonic branding, brands need to be clear, differentiated and most importantly, consistent.

As an audio branding agency, we are often asked to identify action points and measure the success of sonic branding, as well as the return-on-investment for our clients. While there are hundreds of empirical studies that demonstrate the power of sound to increase likability, increase attention, build positive associations, improve brand per-





**_THE WORK IS
THE RESULT of an
interdisciplinary team**

ception, drive purchase intent or facilitate brand/message recall, to date there has not been a standardized system to measure the effectiveness of brands' use of audio assets.

The Best Audio Brand Ranking 2019 is the first performance index of its kind and looks to establish an objective and comprehensive system to evaluate the use of sound, voice and music in branding. It includes a thorough analysis of strategy, quality, impact and a measure of efficiency in

spending resources on music. With this first report we aim to focus attention on the important aspects that brands have to consider when tackling the challenge of establishing a 360° sonic identity.

Sincerely yours,

LARS SCHALWIJK

Senior Strategist & Project Lead

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Strategist



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ABOUT THIS REPORT

_THE BEST AUDIO BRAND RANKING HAS BEEN DEVELOPED BY AMP

as the first global audit of how the world's leading brands are using audio to engage with consumers and boost their brand.

The list of 100 brands analysed within the report was drawn from Interbrand's highly respected Best Global Brands Index, which we felt provided a recognisable and credible selection of brands to study from an audio perspective. However, despite the existence of the Interbrand ranking, and others like it, audio has never been given the in-depth analysis it deserves. Sonic branding is one specific aspect of brands' activity and relationship with people that deser-

ves a far higher level of understanding as it becomes a vital aspect of brand reputation and communications. Our research aims to do just that, subjecting the audio strategies of the world's leading brands to rigorous analysis. By assessing their overall audio brand performance against a series of key "pillars" which comprise a holistic audio identity, we have been able to pinpoint how effectively brands are leveraging their audio assets and identify key areas for improvement. Our research teams employed a series of methodologies, over a period of five months, in order to create the ranking. These included:



_WE ANALYSED BRAND CONTENT

published over the course of 2018

_ARTIFICIAL INTELLIGENCE EVALUATION

ULATION Working alongside our partner, Veritonic, we measured the emotional impact, uniqueness and memorability of audio assets. Veritonic uses machine learning and listening to help brands assess the effectiveness of their audio assets, drawing on real-world consumer responses to provide analysis on emotional response, recall and purchase intent.

EXPERT PANELS We conducted in-depth panel interviews with experts in the field, including amp employees, respected composers and experienced audio researchers. These experts evaluated audio assets based on qualities such as brand fit, uniqueness, flexibility and memorability.

_EXTENSIVE DESK RESEARCH

Drawing on amp's collective expertise, we analysed brand content published over the course of 2018. This consisted of expert analysis of audio assets used across: digital channels, television, products

and customer service lines, amongst others. The analysis also considered how much owned, custom, licensed and stock music was used, as well as how well established these and other sonic assets were (the "history factor").

_SOCIAL MEDIA MONITORING AND

ANALYSIS We partnered with social media monitoring company Storyclash to measure brand engagement online, including views, fan/brand interactions, subscriptions and number of followers. Our findings revealed that, despite the industry "noise" around audio, even the best performing audio brands globally have yet to employ a truly holistic, and efficient, audio brand strategy. With audio set to be an increasingly important asset for brands to engage consumers, it has never been more imperative that they do so. This ranking aims to fill in the existing knowledge gaps around audio branding and provide the very first audio benchmark for brand leaders to measure themselves against.



—WHY SONIC BRANDING enhances business performance

_THE IMPORTANCE OF BRANDS AND BRANDING IN ENHANCING THE PERFORMANCE OF COMPANIES,

has been understood for the better part of a hundred years. Today brand performance is universally recognised as intrinsically linked to business performance. When we think of brands, we think of logos, products, advertising and digital services. But the power of brands is also consciously and subconsciously driven by the music and sounds we associate with them. This has always been important – academic studies show that brand engagement is far stronger when audio is

treated as an equal and essential aspect of the brand. Sound and music have a far more direct influence over our subconscious, decision-making mind.

Today, we can hear brands and expect to hear them more and more. Smart speakers, apps and digital service interfaces increasingly determine our experience of brands – good, bad, memorable or forgettable. In this environment, brands need a coherent audio brand identity. A clear brand purpose and authenticity are also important elements that influence how well a brand engages with people. In this

sense, sound is one of the most powerful tools in a brand's arsenal. Not only does it build an emotional connection with consumers, sound is also able to significantly shape the customer experience, building brand loyalty, recall and trust over time and with repetition.

Moving towards a future where screens will not always be the most prevalent medium, brands will find that a coherent audio strategy which complements their visual, social and cultural equity, is essential to establishing or maintaining their competitive advantage.



AMP HAS FOCUSED ON THE TOP 100 BRANDS

as chosen by Interbrand in its influential
Best Global Brands Ranking

BUT WHAT DOES A GREAT BRAND SOUND LIKE AND HOW DO YOU ACHIEVE IT?

To fill this knowledge gap, we've analysed the performance of the world's top brands to create a benchmark for sonic branding globally. amp's Best Audio Brands Ranking provides insights into the world's best audio branding examples and identifies where there are opportunities for improvement. Our analysis embraces the full spectrum of audio touch-points brands can use: from music used in audio-visual productions, to sound in physical brand spaces and voice interactions through smart speakers.

To ensure that the Best Audio Brands Ranking includes the most useful selection of brands in its overview, amp has focused on the top 100 brands as chosen by Interbrand in its influential Best Global Brands Ranking. In this way we hope to add another essential layer to the understanding of brand performance.



_WHY EFFECTIVE AUDIO STRATEGIES depend on the creation of Sound DNA

WHEN BRANDS CONSISTENTLY APPEAL TO MORE THAN ONE SENSE, BRAND LOYALTY INCREASES.⁵

Before describing the methodology and analysis of the Best Audio Brands Ranking, it is important to first provide an overview of the history and craft involved in sonic branding.

Sonic Branding uses sound strategically to shape brand experiences and communication. Put simply, a sonic identity is the acoustic equivalent of a visual identity – something that all brands invest in, without question. As such, a sonic identity takes into account the brand values, tone of voice (personality) and overall purpose, to form a connected sonic brand identity.

Investment in audio branding should be focused on the long-term objective of gro-

wing and building assets that can be used flexibly across all touchpoints. However, thinking strategically about sonic branding is a relatively new concept.

There are many terms that relate to the discipline: sonic branding, audio branding, audio mnemonic, acoustic branding, sound identity system, and others! All of these connect to the same idea – creating an audio experience that will complement the visual one and enhance brand engagement. To date many brands have approached the creation of audio assets on a short-term or tactical basis without exploring the opportunities and rationale for a strategic approach.

In the past, sonic branding was a synonym for the sonic logo – used to drive brand awareness across a limited number of TV

or radio advertising slots. These are the “jingles” or shorter melodies we are all familiar with, used to enhance memorability in the era of broadcast media.

Brands have also experimented with “corporate sound identities”, using a set of static audio elements or single melodies, designed to achieve instant recognition.

However, this single melody approach falls short of achieving meaningful results in a world dominated by multi-channel media and a vast range of social- and service-technology platforms all vying for our attention. In such a complex and challenging environment, a far more comprehensive approach is needed to keep pace with tech and marketing developments and enable brands to build long-term audio strategies.





**_THE SECRET OF A GOOD
SONIC IDENTITY LIES IN THE
COMBINATION of creative
flexibility and brand recognition**

_CREATING A BRAND SOUND DNA.

At amp, we are convinced that an integrated and flexible approach to sonic branding is key to tangible success and a strong return on investment.

We have developed a tried and tested approach to creating a truly multi-faceted **SOUND DNA**. This strategy employs **SONIC WATERMARKING** to generate brand recall, whilst simultaneously providing the creative freedom to write and produce authentic branded audio assets. By continuously deriving audio elements from the unique **SOUND DNA**, the brand's core sonic identity appears across

all audible touchpoints, from soundtracks to app idents. Derivative elements are also created on-demand, in line with the brand's objectives and needs at that moment in time. Imagine a piece of music that is used in many different ways, not just edited in length, but broken down into its components and recomposed to suit all scenarios of the brand experience. This approach creates both unity and diversity. A powerful, consistent holistic audio experience flexes and flows wherever people hear and encounter it.



_IT HAS BEEN MORE THAN 60 YEARS SINCE WE HEARD THE FIRST JAMES BOND SOUNDTRACK, but it still feels just as fresh and identifiable with each new interpretation

_LONGEVITY AND FLEXIBILITY

Consider the James Bond sonic identity. It has been more than 60 years since we heard the first James Bond soundtrack, but it still feels just as fresh and identifiable with each new interpretation. This is because the James Bond brand has invested heavily in its own sound assets, creating a core SOUND DNA and adapting it to the zeitgeist with each film. Brand recall, memorability and flexibility are powerful properties of this well-rounded sound identity.

By taking this approach, the James Bond brand has been able to ensure that every dollar invested in audio, is a dollar invested in building brand equity. As a result, it has been able to successfully communicate the brand for decades and scale the sonic brand across geographies and time.



_DESIGNING AN AUDIO EXPERIENCE Often overlooked, sound also plays an important role in product design, considering its significant impact on the customer experience and the immersive customer experience it can help create. This is particularly important when today's sophisticated interfaces allow for more fluid and meaningful interaction between brand and consumer. We live in a world where technology is increasingly integrated into our daily lives, and voice interfaces are changing the way in which we interact with brands. Indeed, by 2020 it is believed that

nearly a third of all web browsing sessions will be screenless, with consumers choosing voice as their medium instead⁶.

In this environment, brands will need to identify and treat their audio blind spots, particularly when they cannot compensate with their visual identity.

For tomorrow's consumer, audio is no longer a "nice to have" but an essential brand asset. SOUND DNA-based sonic branding can help brands create a cohesive audio environment in which voice and music are powerful tools to drive the customer experience and engagement.





_BEST AUDIO BRANDS system and methodology

_THE BEST AUDIO BRANDS RANKING is specifically designed to identify strong and weak audio performers, determine any missed strategic opportunities and produce actionable solutions to boost a brand's audio value and return on investment.

Based on our experience, we have identified five key pillars that comprise a sonic brand identity plus an additional ROI pillar (audio brand efficiency). These pillars cover different aspects of brand management, from brand relationship quality, to consumer-based brand equity and the brand experience.

For data acquisition and calculation of the KPI's we employed artificial intelligence-based evaluation, expert panel analysis, extensive desk research as well as social media monitoring.



_CONSISTENCY, UNIQUENESS, FLEXIBILITY of audio brand assets are essential factors for a successful sonic branding strategy



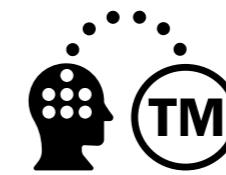
_CUSTOMER TRUST

Trust = Consistency + Time. The consistent use of recognisable sound assets builds trust and ensures a connected brand experience across all audible touchpoints. A sonic identity contributes to brand equity by building strong emotional relationships, which in turn drive long-term customer loyalty and value. For each brand's Customer Trust score we analysed the consistent use of high-quality sonic assets. For this, we analysed the use of owned music and sonic assets, how long these assets had been used by the brand, and the consistency of use of the assets across multiple touchpoints and markets.



_CUSTOMER BELONGING

Stock music does not incentivise consumers to bond with a brand. Uniqueness, authenticity, and relevance do. When a brand has a sonic identity with these three traits, and uses recurring sonic assets created by real musicians, it's much easier for consumers to connect with a brand on a deeper level and feel a sense of belonging within the brand community. In order to assign a Customer Belonging score to each brand in the ranking we evaluated the quantity of stock music used (which has a negative impact), the uniqueness of the sonic assets used at different touchpoints, the overall brand fit of the sound, and the quality of customer engagement across social channels.



_CUSTOMER RECOGNITION

Consistent and unique sonic assets are essential if you want your brand to be recognised across all audible touchpoints. This means going beyond a static "sound logo", and instead leveraging core sonic elements from a bespoke SOUND DNA. These core elements can be used across several environments to create a holistic and consistent sonic identity; from soundtracks to advertisements, to product sounds to hold-music for customer hotlines. Our Customer Recognition score was developed based on the quantity of owned music and sonic assets each brand possessed, the number of sonic assets used, and the uniqueness and memorability of the sound used at different touchpoints.



A PERFECT AUDIO BRAND SCORES HIGHLY ACROSS ALL PILLARS by using dedicated audio brand assets derived from a bespoke **SOUND DNA**



CUSTOMER ENGAGEMENT

This pillar takes into account how customers react to and interact with the brand. Strong interactions on digital media and the use of high quality music

drive the score of this pillar. For customers to engage with your brand authentic music and sound that reaches the relevant target groups and suits the current trends is key.

Our customer engagement score was based on the number of video interactions and views on social media, the overall quality of sound and music used, and the quantity of stock music used (which had a negative impact).



CUSTOMER EXPERIENCE

To create an excellent customer experience across all audible touchpoints, brands must ensure they are producing audio assets of a high quality. If the

brand gets this right, audio is able to impact customers on a profound emotional level – boosting long-term brand equity and consideration on the path to purchase.

In order to assign a Customer Experience score to each brand in the ranking, we assessed: the consistency of sonic assets used across different touchpoints and markets, the flexibility of those assets to different use cases, the amount of custom and licensed music used, as well as the overall quality of sound and music used.



RETURN-ON-INVESTMENT

The final, sixth pillar, is return on investment. What does a brand gain for the money spent on audio assets? Can a shift in strategy streamline spending,

whilst boosting brand equity?

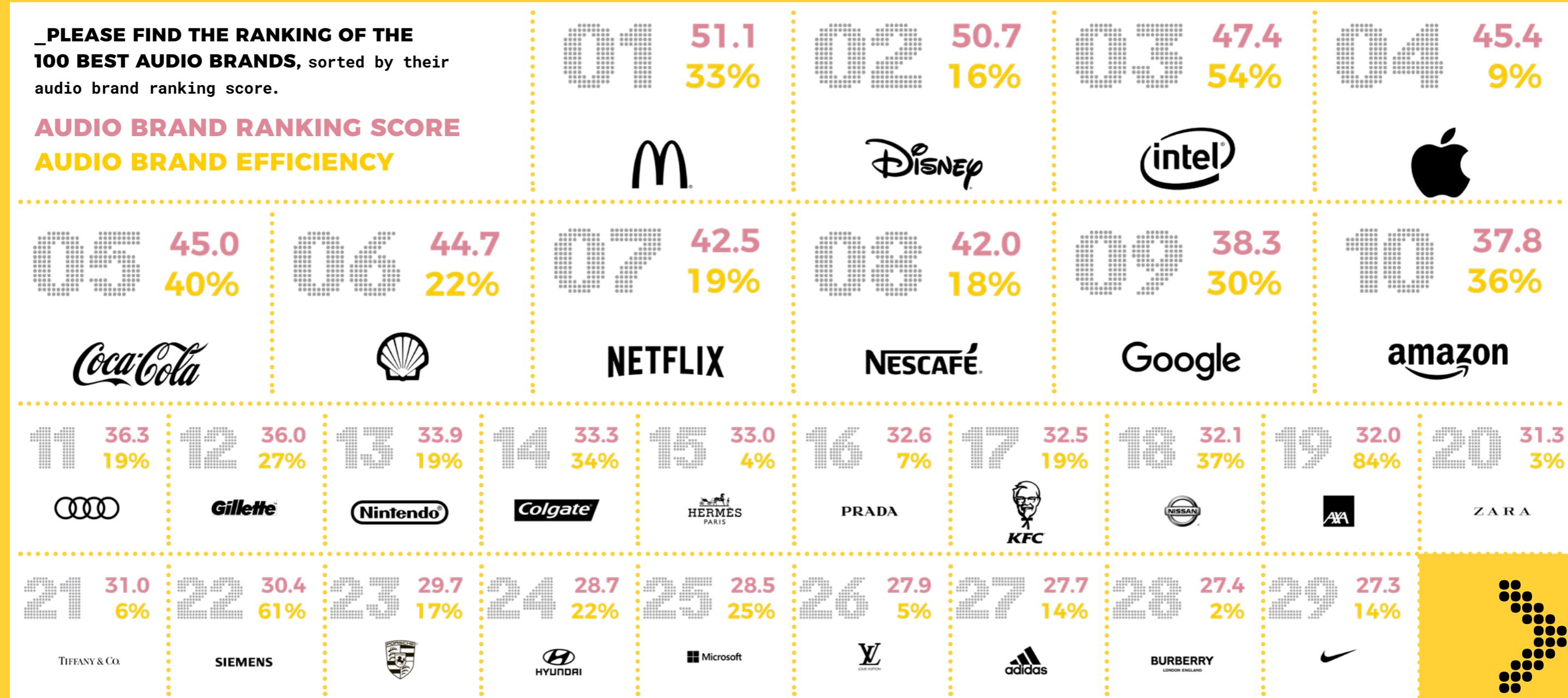
We estimated the ROI (audio brand efficiency) of every dollar spent on music and sound for audio-visual content on digital and TV. This is then measured against our benchmark of a brand that owns their sonic identity and uses unique and reusable sound assets strategically across all audible touchpoints. In order to create a return-on-investment ranking, we drew on social media monitoring, extensive desk research as well as our inside knowledge regarding music production costs.



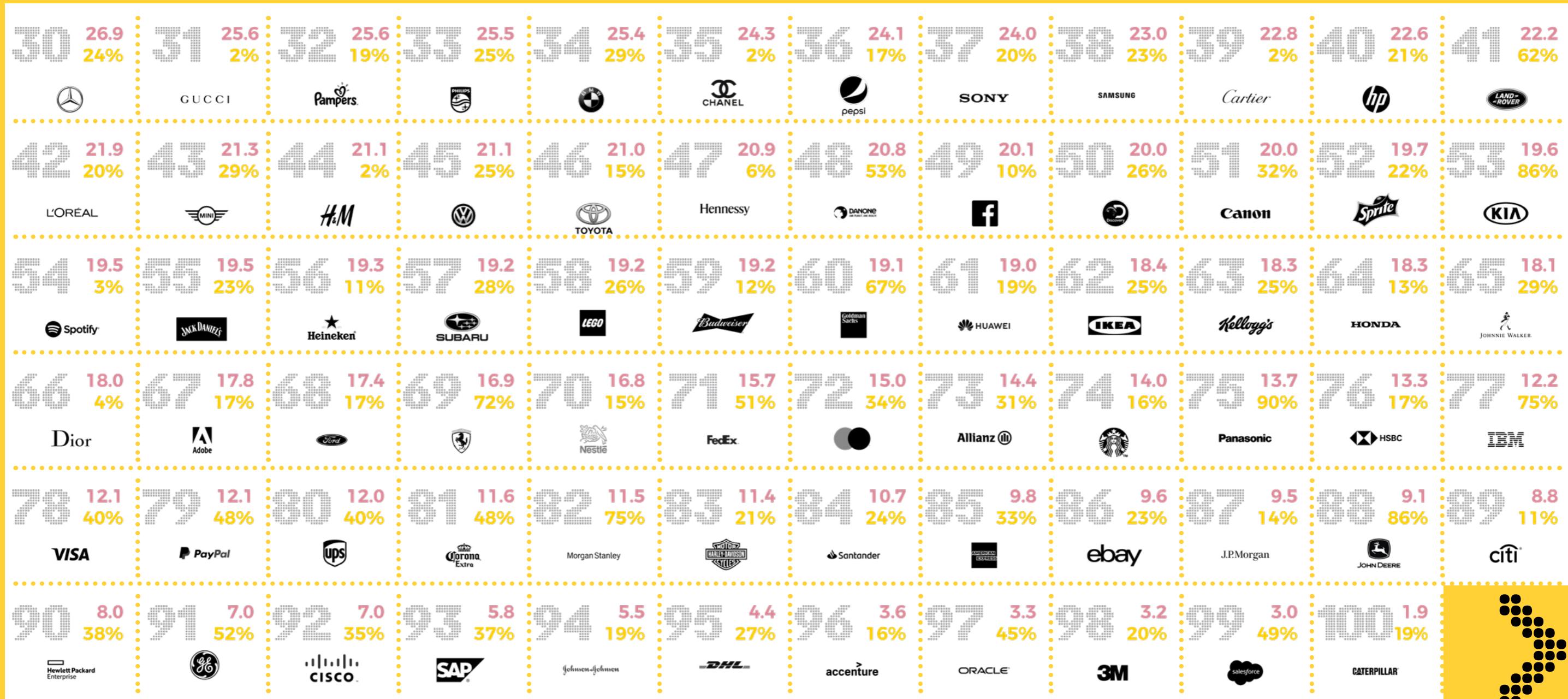
100 BEST AUDIO BRANDS

PLEASE FIND THE RANKING OF THE 100 BEST AUDIO BRANDS, sorted by their audio brand ranking score.

AUDIO BRAND RANKING SCORE
AUDIO BRAND EFFICIENCY



_OF THE 100 BRANDS COVERED IN THE 2019 RANKING, only 22% can be said to be using sound effectively and even among the top performing audio brands there is significant scope for improvement



_Insights

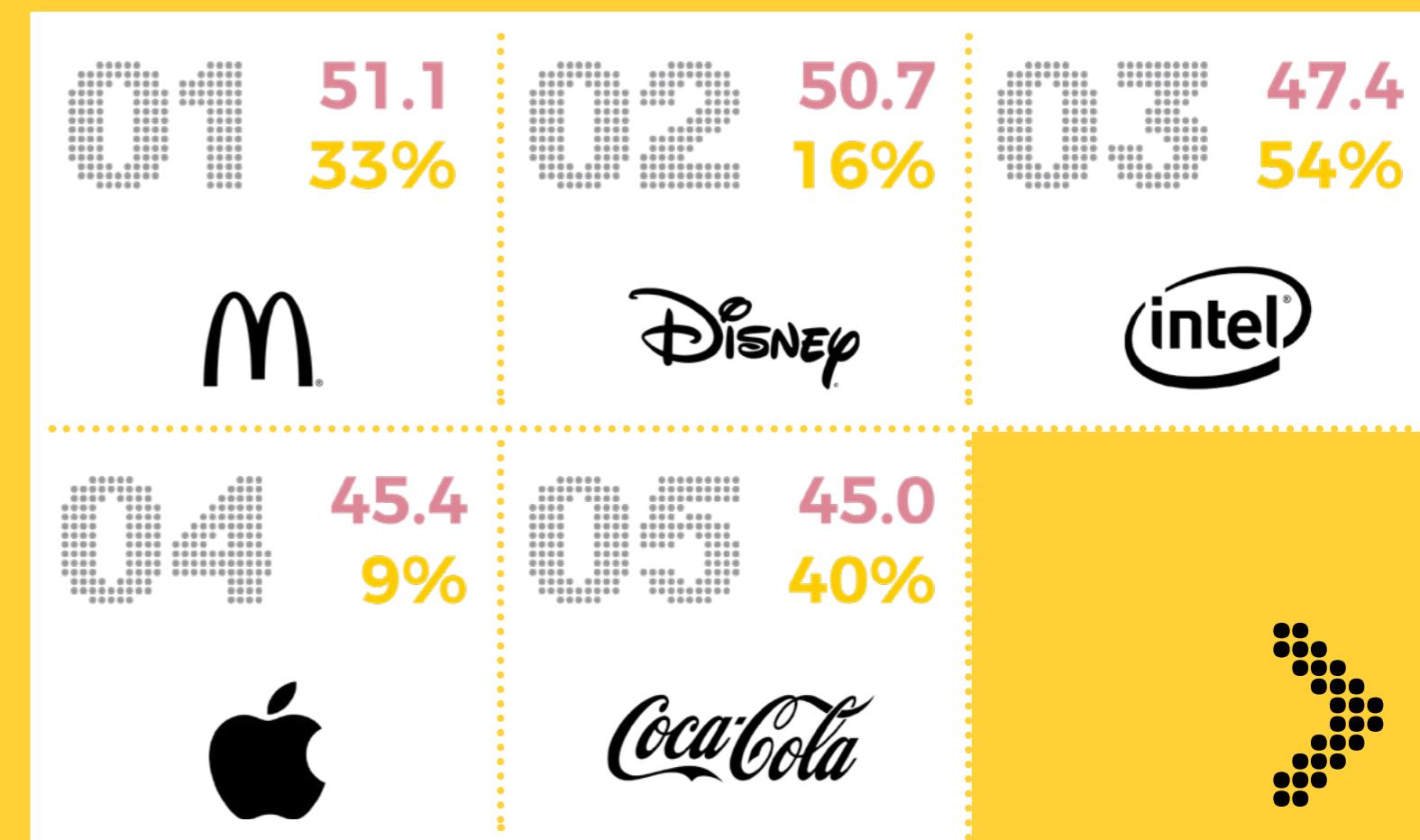
BEST AUDIO BRANDS, Top 5 Performers: McDonalds, Disney, Intel and Coca Cola

THE TOP FIVE PERFORMERS

IN THE RANKING - McDonald's, Disney, Intel, Apple and Coca-Cola - achieved their places through strategic use of sound assets that fit the brand and are consistently deployed across different touchpoints. Despite this, these brands are still far from performing well, with McDonald's only achieving a very average ranking score of 51/100. Whilst the use of simple sound logos or signatures has served these brands well over the last decade or so and they can be considered to be audio branding pioneers, a single sound asset

is no longer fit for purpose. The digitisation of so many aspects of everyday life and the growing potential of voice interactions and audio signposting for digital experiences and media content, means sonic branding must work across many different scenarios. People need to hear brands as they interact with them.

If the top scoring brands of 2019 do not adapt quickly to the digital environment in which people live their lives by creating a flexible, owned set of core audio assets (a Sound DNA), they may find other nimbler brands moving up the ranking in their place.

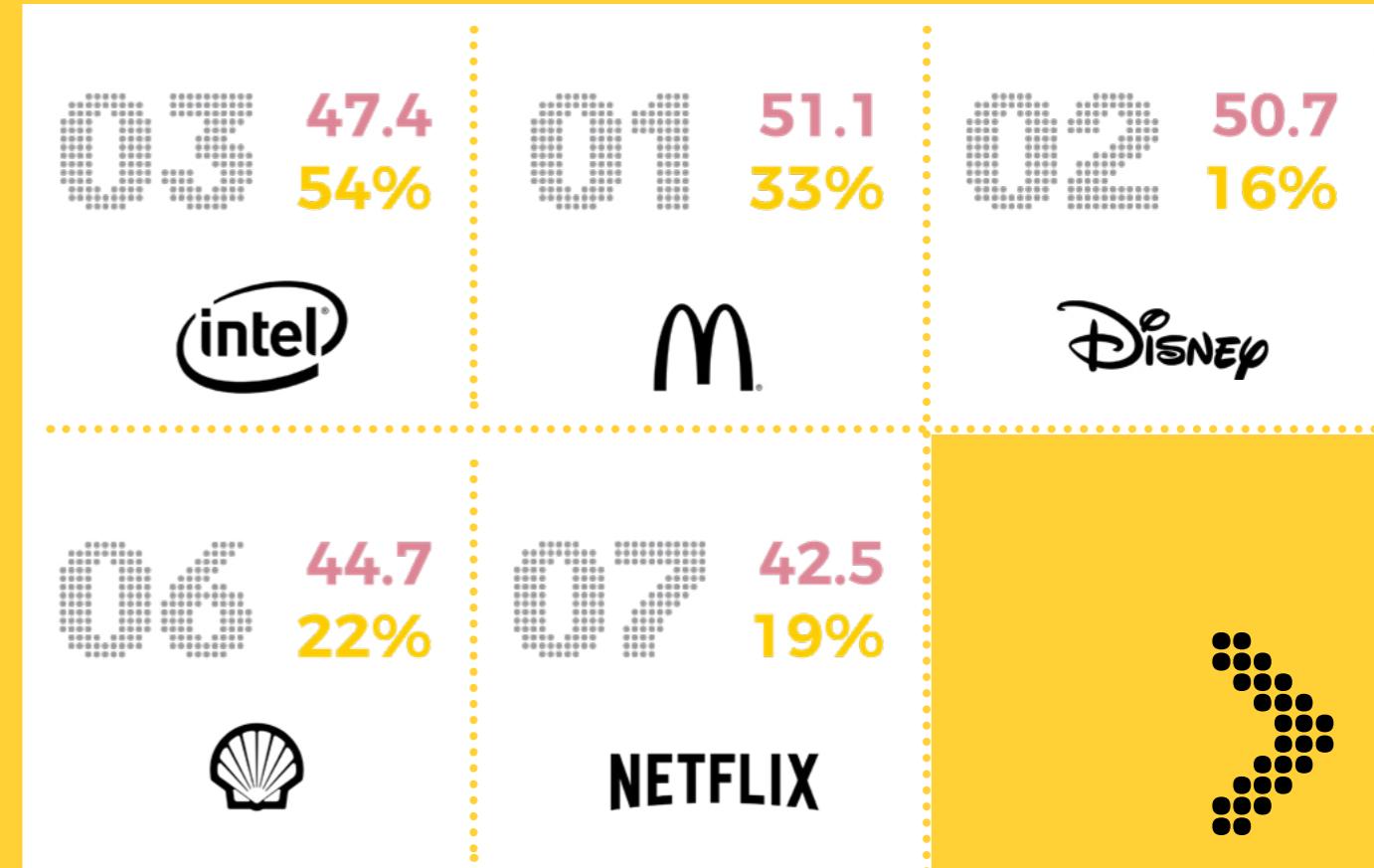


_Insights

_TOP 5 Strategy Performers: Intel, McDonald's, Disney, Shell, Netflix

CONSISTENT USE OF SOUND AS-SETS BUILDS TRUST, which is half the battle when it comes to driving long-term customer value in an increasingly fragmented competitive landscape. Think of the vast number of options people have online in sectors such as leisure, travel, fashion, FMCG, media, entertainment, home furnishings, utilities, telecoms – to name a few! If your customers are using audio search, how will you stand out as a possible option and how will you facilitate the transaction? Will your brand come with a halo of trust established through long-term exposure to audiences?

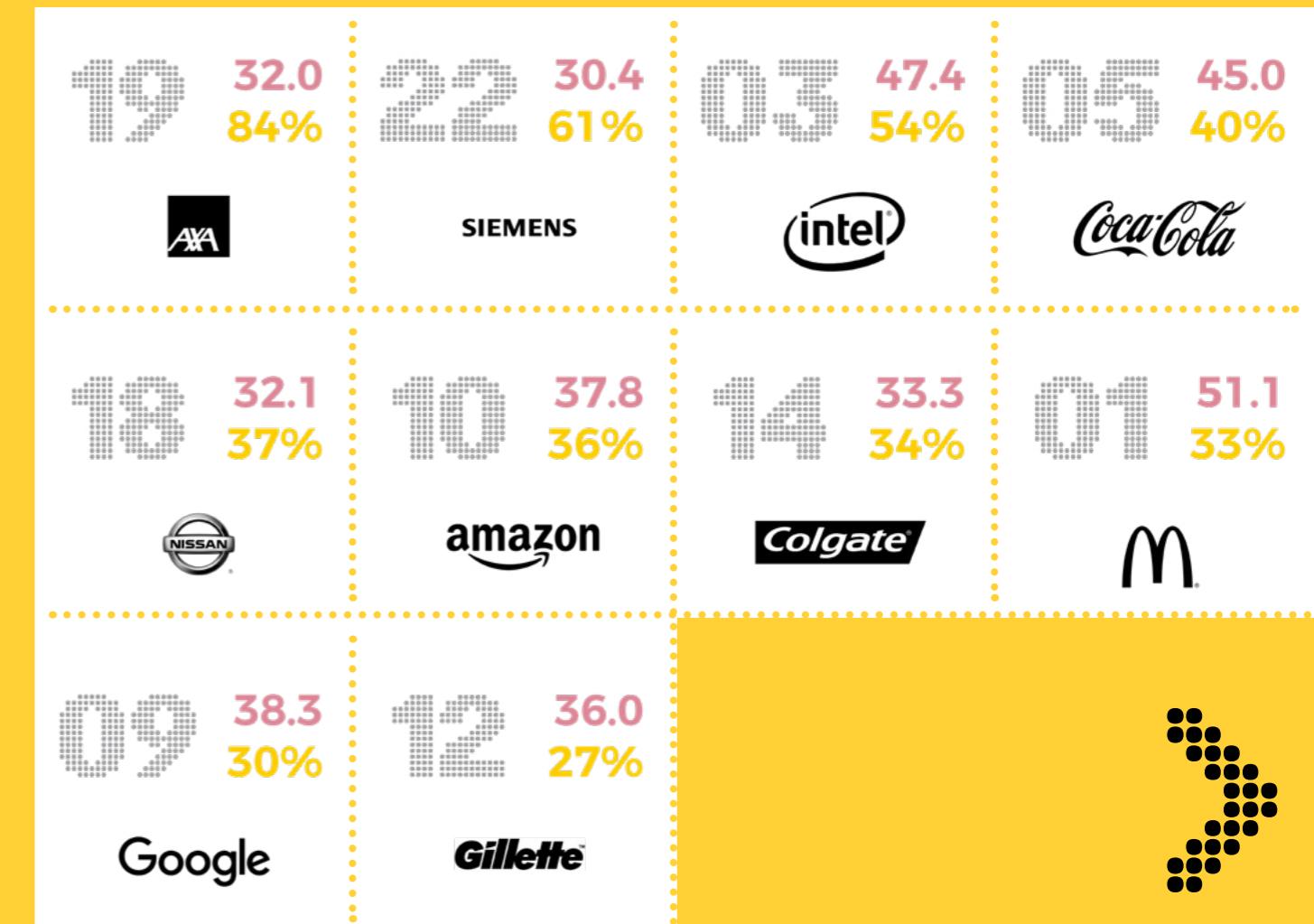
Even brands such as Intel (one of the first to leverage a sound logo), which has established strong recognition and reinforced trust through sonic branding, will need to adapt their audio strategy to embrace the wider digital world we all live in. Using that single sound logo across new service media may not be as effective as recent studies have proven⁷. Other brands, such as Shell, will face a similar problem; although Shell has invested in a robust audio brand strategy, comprising of several assets and adaptions, the brand must ensure it sounds authentic if it is to build customer trust in the long-term.



_Insights

MOST EFFICIENT BRANDS in the top 25

WITHIN THE RANKING, there are several brands (such as AXA, Siemens, Coca-Cola, and Shell) that have started to consider the strategic implementation of multiple, owned audio assets that work in unison, resulting in a higher efficiency score. Brands that commission owned music and adaptable sound assets are investing money in their long-term audio identity, instead of simply renting it. The more owned assets a brand uses, the more adaptable and efficient their sonic identity becomes. This is because they are able to flex their assets to different touchpoints more easily, whilst remaining recognisable no matter the context. In order to ensure long-term effectiveness, brands must ensure they are able to adapt their audio assets for different stories, touchpoints and use cases so they aren't forced to choose between customer experience and customer trust.



CONCLUSION

THE ANALYSIS PROVIDES A PICTURE OF how effectively brands are extending their audio presence

THIS FIRST BEST AUDIO BRAND RANKING HAS REVEALED THAT A VERY LARGE NUMBER OF BRANDS ARE USING SOUND

but, whilst an audio strategy is very much on the agenda for the world's leading brands, they haven't necessarily determined where it could take them next. This is because these companies, and others at the top of the ranking, are currently using just a single sound asset to boost their brand, typically in advertising deployed across broadcast media channels. Whilst this approach has served them well in the last decade, when they were audio pioneers, a single sound asset is no longer fit for purpose at a time when consumers are increasingly interacting with (and finding) brands sonically. Moreover, as the audio landscape grows, those using a single sound asset will find they face a dwindling return on

investment, as their assets are unable to flex to new customer interactions. Other brands that made the top ten, such as Apple and Google, have benefited from their dedicated product sounds, and differentiated digital experiences – although they too fail to demonstrate a comprehensive sound strategy across all channels. Those looking to improve their standing should focus their efforts on developing a holistic sonic identity; which is not only ownable, but easily adaptable to new contexts and customer experiences, some of which we cannot even imagine today. We are already working on the next Best Audio Brands 2020 with data from 2019 and we are observing first changes in the sound assets strategy, which suggest that the next Best Audio Brands ranking will present surprises and interesting news. Stay tuned!



FUTURE

PAST

GLOSSARY & References

GLOSSARY

SOUND DNA: the core of the sonic identity including brand specific musical elements and brand voices from which all sonic assets are derived (music, product sounds, voices etc.)

OWNED MUSIC: Made for and owned by the Brand, recognizable across all touchpoints including elements of the sound DNA

CUSTOM MUSIC: Exclusively composed for specific campaigns or products.

LICENSED MUSIC: Licensed song which is part of the world repertoire (non-exclusive).

STOCK MUSIC: Generic piece of music pre-composed and pre-produced for a broad range of applications (non-exclusive).

PRODUCT SOUND & VOICE: The use of sound and voice across products to enhance the User experience.

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STORYCLASH is a social media monitoring solution. Brands, agencies and publishers monitor their brand and competitors, track their owned and earned media and find content trends as well as influencers with Storyclash. Everything in real-time.



STORYCLASH

VERITONIC is the audio effectiveness company. The first analytics platform built to quantify the value of sound, Veritonic scores and benchmarks audio creative to produce fast, robust evi- dence around the sonic brand elements, voices, music and scripts that influ- ence audiences the most. As a result, the world's leading audio platforms, brands and others leverage the most memorable, persuasive audio -- in everything from podcasts to streaming/radio ads -- to cultivate deeper relationships with customers through sound.

VERITONIC

ABOUT AMP, the world leading sound branding agency



reddot award
winner



_AMP IS THE WORLD'S LEADING AGENCY FOR SOUND BRANDING.

Combining unique expertise in brand strategy with decades of experience in music composition, production and compilation, amp creates holistic sound identities that amplify a brand's essence and strengthen its connection to its target audience at every touchpoint, from sound logos on TV to ambience in retail environments.

We have patented a powerful approach to sound branding that creates an entire **SOUND DNA®** for brands as source for all further sound elements and adaptations. This strategy uses **SONIC WATERMARKING®** to ensure brand recall but at the same time to have the highest creative freedom to create authentic sounds and music. With offices in Germany, Switzerland, Italy and USA (New York and Miami), as well as network offices in Middle East (Dubai), China (Shanghai) and UK (London), amp clients include Mastercard, Mercedes-Benz, BBVA, Porsche, Uni-Credit Group, Douglas, Geberit, Vodafone, Triumph and BMW.

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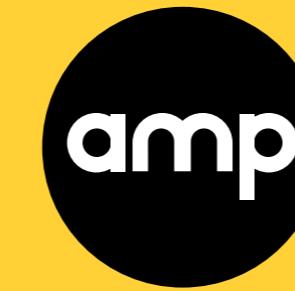
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