

amp



_best

AUDIO BRANDS

2021

www.bestaudiobrand.com

_SHIFTING (BRAND) PARADIGMS with sound



_A LOT HAS BEEN WRITTEN ABOUT the transformational impact of COVID-19, from how we go about our daily lives to how brands had to rapidly rethink their approach to marketing, retail and customer experience. The past 18 months have accelerated the importance of sound and voice as vital elements of the brand identity and customer experience toolbox. With consumers favoring app-based and “contactless” digital interactions and a rise in streaming and audible content consumption, marketers have shifted spending to boost digital storytelling strategies. So, making a brand heard has become even more vital than ever before. All important considerations as we were preparing for this third edition of our annual Best Audio Brands

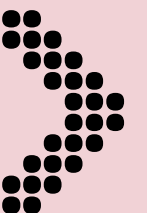
report. What has changed since our last Best Audio Brands report? How are brands utilizing sound in 2021? Are there new top performers? Let’s dive into our 2021 key learnings in terms of sonic! In partnership with well-established media and AI companies, Storyclash, Veritonic and Cyanite, we examine the audio effectiveness of 100 world best brands throughout their digital touchpoints, ensuring comprehensive measurement of all KPIs. While this year’s report is still based on Inter-brand’s Top 100 brands, we have started to evolve our ranking and will do so over the coming months to include more brands and industries. Without giving away too much, we want to congratulate the top ten

brands and all the newcomers for their use in sound over the last 12 months. And a special shout out to Mastercard for claiming the top spot of Best Audio Brand 2021 for the second year in a row. We wish you an inspiring read - in the hope that our reports will lead to an increased awareness of the importance of sound in the digital age.

Sincerely yours,

MICHELE ARNESE
Founder & Global CEO

ULI REESE
Partner & Global CMO



_WELCOME TO THE BEST AUDIO BRANDS OF 2021

_LIKE SO MANY INDUSTRY REPORTS and analyses over the past 12 months, Best Audio Brands 2021 reflects how global brands had to adapt to changing consumer behaviors and the new realities for customer experience, retail, and brand strategies impacted by COVID-19. According to analyst reports, digital advertising spending in the U.S. grew 12.2% year over year in 2020¹ with marketers shifting funds towards digital content and storytelling. Daily online content consumption worldwide has soared since the start of the COVID-19 pandemic, doubling on average from 3 hours 17 minutes to 6 hours 59 minutes, a new study finds.²

And the vast majority of consumers who have increased their use of digital and omnichannel services, such as home delivery, curbside pickup, or shopping via social media platforms, expect to sustain these activities into the future.³

With these shifts in the market, **the importance of sound, voice and music has rapidly accelerated.** When we created the first Best Audio Brands study in 2019, we drew from Interbrand's highly respected Best Global Brands Index, which we felt provided a recognizable and credible selection of brands to analyze from an audio perspective.

¹ <https://www.cnn.com/2021/04/07/digital-ad-spend-grew-12percent-in-2020-despite-hit-from-pandemic.html> ² <https://www.warc.com/newsandopinion/news/global-online-content-consumption-doubles-in-wake-of-covid/44130> ³ <https://www.accenture.com/us-en/insights/retail/coronavirus-consumer-habits>

_MASTERCARD LEADS THE TOP 100 for a second year in a row

The 2021 Index has seen some brands fall out of the Top 100 - namely Shell and Nintendo, both of which ranked high in our past Best Audio Brands reports - and, as one would expect, among others, some new digital players rise in the rankings: Zoom, Instagram, YouTube and more.

Similarly, **Best Audio Brands 2021 sees (hears) brands perform better than already have sonic identities or sonic strategies in place.** They were able to implement a more audibly recognizable approach to digital storytelling across many platforms that consumers gravitated to in 2020 and into this year.

Mastercard leads our Top 100 for the second year in a row, given the brand's continued focus on a consistent and purposeful approach to using sonic across its whole business-to-consumer and business-to-business customer experience globally. Since 2019, Shell has consistently been featured in the top ten of our Best Audio Brands ranking, while Nintendo came in at number 10 in 2020. Both are, in many ways, a case study on how some of the world's biggest brands can strategically use sound.

Despite Interbrand's 2021 ranking, dropping Shell and Nintendo out of Best Audio Brands would not give an accurate picture of the sonic brand landscape since the two have performed so strongly in the past. We, therefore, analyzed all brands from both this year and last year's Interbrand ranking. Salesforce, Oracle, 3M, Santander, and CAT did not make the cut.

As we prepare for the 2022 report and introduce additional sonic industry and sector deep dives in our quarterly *"amplify" magazine*, we will expand our sources on brands to represent our research. We aim to become less reliant on Interbrand's list in the future and give our readers a more comprehensive list of the Best Audio Brands and beyond. For now, on behalf of amp, I wish you an enjoyable read of our 2021 report.

Sincerely yours,

BJORN THORLEIFSSON
Head of Strategy & Research, amp



_OUR PARTNERS

_Evaluating brands
and sound with an
**INTERDISCIPLINARY
TEAM OF EXPERTS**

_STORYCLASH is a social media monitoring solution supporting all major platforms. They track **relevant social media activity worldwide, helping companies measure their influencer campaigns,** benchmark themselves against the industry and discover new content trends. Storyclash makes the invisible visible for brands.



_CYANITE is an AI company for music analysis and recommendation. **Their technology can understand music by its mood, genre, voice, energy, and more, with a strong focus on B2B use cases,** and delivers deep music insights to music companies, sound branding agencies and radio stations. With that, their clients curate their music catalogs with the help of AI and are able to offer state-of-the-art music search and recommendation experiences. All with the goal of making professional work with music easier and more data driven.



_VERITONIC is the audio intelligence platform, **empowering marketers to understand and quantify the most effective way to use sound.** It's the first analytics platform built specifically for brands to navigate audio marketing easily and maximize the massive opportunity it presents.

From the podcast, streaming, or radio ads that drive sales to where you stand relative to competitors to what makes the most resonant sonic brand, Veritonic is one place to answer every critical question about marketing in audio.

Powered by "Machine Listening and Learning"™, the Veritonic platform scores and benchmarks audio assets quickly and comprehensively, guiding brand leaders like Indeed and platforms like Pandora to make decisions that cultivate deeper relationships with customers through sound.



_CONTRIBUTORS

_THIS 3RD EDITION OF BEST AUDIO BRANDS is on a mission to broaden the horizons of branded sound. Collaborating with our partners and colleagues, we are extending the understanding of sonic usage across most prominent brands in the world. Thank you for being part of the journey!



MICHELE ARNESE
*Founder & Global CEO,
amp*

Michele is a self-driven strategic and creative thinker with a strong entrepreneurial approach. He's considered one of the world's foremost experts in the field of sonic branding, with numerous international awards.



JESSICA REININGER
*Junior Client Manager,
amp*

Client management and development of sonic branding strategies for amp's global client list is her driving force. Her music passion combined with Business Administration background makes her a prospective expert in all branding touchpoints.



BJORN THORLEIFSSON
*Head of Strategy & Research,
amp*

With a background in psychology, sound-engineering and consumer behavior, Bjorn's expertise lies in practical applications of music and psychology to the "real world". Specifically, music's influence on consumer behavior, marketing, and employee well-being.



AMANDA DI MARCO
*Director of Customer Success,
Veritonic*

Having held positions in both sales and customer success, Amanda's unique skill set includes building effective, trusting and lasting customer relationships at the enterprise level. Passionate about working along side customers bringing a strategic, consultative approach.



MARKUS SCHWARZER
*CEO,
Cyanite*

Markus is an entrepreneur at the intersection of AI and music. Through his work, he aims to help democratize access to high tech. With a background in business administrations, Markus has published several articles on innovation and business modeling.



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_ABOUT THIS REPORT

_OUR APPROACH

The Best Audio Brands ranking aims to capture how a brand is performing in terms of how it uses sound effectively each year, while considering what it has done previously. To do so we have built on methods of evaluation whilst leveraging a solid set of research tools that we are continuously improving.

_EXTENSIVE DESK RESEARCH

Drawing on amp's collective expertise, we analyzed brand content published throughout 2020. This consisted of expert analysis of audio assets used across digital channels, television, products and customer service lines, among others. The analysis also considered how much owned, custom, licensed and stock music was used, as well as how established these and other Sonic Assets were (the "history factor").



_WE ANALYZED BRAND CONTENT published over the the past 12 months

_ARTIFICIAL INTELLIGENCE EVALUATION

Working alongside our partner, Veritonic, we measured the emotional impact, uniqueness and memorability of brands' 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.

_SOCIAL MEDIA MONITORING AND ANALYSIS

We partnered with the social media monitoring company Storyclash to measure brand engagement online, including views, fan/brand interactions, subscriptions and number of followers which affect the Best Audio Brands sonic pillars in different ways.

_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. Using these four methods we aim to be as thorough, fair and unbiased as possible when analyzing how brands are using sound, music and voice each year.





SYSTEM AND METHODOLOGY

The Best Audio Brands Ranking is specifically designed to identify the strongest and weakest audio performers, determine missed strategic opportunities, and produce actionable solutions to boost a brand's sonic equity and return on investment.

Based on our experience, **we have identified six key pillars that comprise a sonic brand identity.** These pillars cover different aspects of brand management: From brand relationship quality, to consumer-based brand equity and brand experience. For data acquisition and calculation of the KPI's, we leveraged extensive desk research, artificial intelligence-based evaluation, expert panel analysis, and social media monitoring.



SIX KEY PILLARS FOR A SUCCESSFUL

Sonic Branding strategy



_CUSTOMER TRUST

Trust equals consistency and time. The consistent use of recognizable 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 with consumers**, which in turn drive long-term customer loyalty and value.

For each brand's Customer Trust score, we analyzed the consistent use of high-quality sonic assets. Research was carried out into the use of owned music and sonic assets, looking at how long these assets had been used by the brand and the consistency of use of the assets across multiple touchpoints and markets.

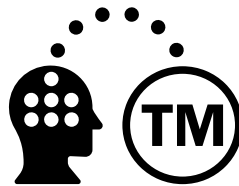


_CUSTOMER BELONGING

Stock music does not stimulate consumers to bond with a brand. Uniqueness, authenticity, and relevance, do. When a brand has a sonic identity

including 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 with the brand community.

To assign a Customer Belonging score to each brand in the ranking, we evaluated the quantity of stock music used (which often 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.

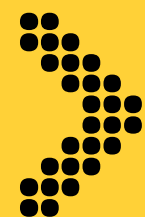


_CUSTOMER RECOGNITION

Consistent and unique sonic assets are essential if you want your brand to be recognized 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, 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.



_CAPTURING HOW BRANDS ARE PERFORMING in terms of how they use sound effectively



_CUSTOMER EXPERIENCE

To create an excellent customer experience across all audible touch-points, **brands must ensure they are producing audio assets of high quality.** If the brand gets this right,

audio can 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 touch-points and markets, the flexibility of those assets to different use cases, the amount of custom and licensed music used, and the overall quality of the sound and music used.



_CUSTOMER ENGAGEMENT

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

that reaches the relevant target groups and suits the current trends **are 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).



_RETURN ON INVESTMENT (ROI)

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

We estimated the ROI (efficiency) of every dollar spent on music and sound for audio-visual content on digital and TV. This was then measured against our benchmark of a brand that owns its sonic identity and uses unique and reusable sound assets strategically across all audible touchpoints.

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. A perfect audio brand scores highly across all pillars by using dedicated audio brand assets derived from a bespoke SONIC DNA.



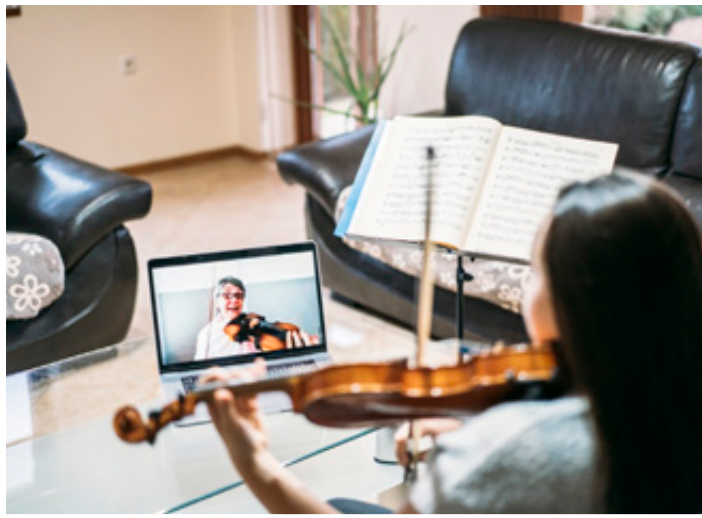
TRUST AND AUTHENTICITY in times of trouble

_TEXT BJORN THORLEIFSSON, AMP

_DURING THESE UNPRECEDENTED TIMES, there has been one message that consumers have been bombarded with. Brands and companies telling us that they care, we can trust them and that we are in this together.

Last year, many global brands were suddenly faced with discarding marketing campaigns that had been in the pipeline for months. Faced with an open-ended calamity that had no obvious parallel in the advertising world, they concluded that they needed to respond – and quickly.

The result was cobbled together campaigns that were genuine and considered responses for the time. However, likely they had all been given the same brief, and inevitably ended up sounding exactly the same. I do not mean to bash the agencies involved. It is no easy feat to create a campaign under the pressure of time and a lockdown.



“TRUST HAS TO BE EARNED and should come only after the passage of time.”

~ Arthur Ashe

Most of you reading this will have seen a video by “Microsoft Sam”. It featured a montage of COVID-19 commercials from the United States that all tell the same banal things. “Here for you” they said, “more than ever”, “times like these” and “we’ll get through this together”. What they also have in common is the type of music, piano or string-led music pieces that are meant to showcase the seriousness of the situation while evoking feelings of grief, empathy and caring. And in their defense, studies have shown that the use of emotional Piano-String-Ensembles does exactly that. Why am I discussing the covid campaigns when they have been covered so extensively in marketing journals over the past year? It has to do with the message that all the brands were inherently sending **“Trust Us”**.

All brands strive to be trusted. Trust is the cornerstone of any relationship. When creating sonic identities for brands we are often tasked with

making sure that the sonic identity evokes the feeling of trust. But ask yourself what kind of music makes you feel trust or is trustworthy. You potentially think of a particular type of music. Maybe a lullaby that your father sang to you before bed or a hymn that you would hear at your temple or church. Nevertheless, the music itself is not evoking trust in itself; it is the memory of your father singing or the feeling of being at the temple.

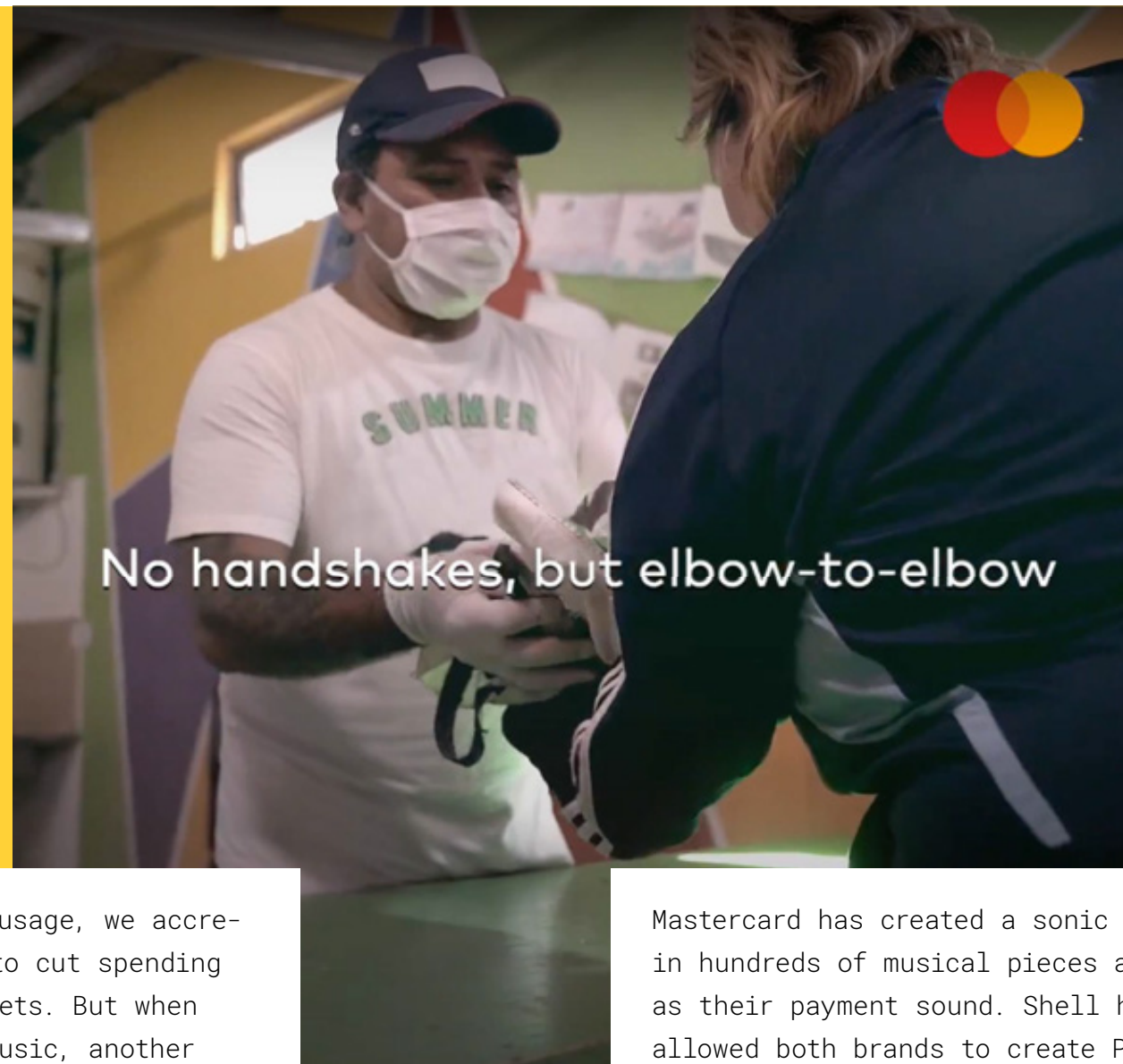
Music is one of the best ways to trigger emotion.

However, to trigger trust, the music needs to be associated with the brand and the brand needs to have earned it. As it is always with trust it needs to be earned through time. We do not create sonic assets that evoke trust per se. We create assets that are authentic to the brand and, if used consistently, will be associated with trust as long as the brand deserves to be trusted. So, if we go back to the covid campaigns, what were the brands missing to evoke trust?

In my opinion it was authenticity. Having a sonic logo or corporate song is a first step in having a sonic strategy, but for it to be a successful strategy that brings added value to the brand it needs to be authentic.

The sonic strategy needs to reflect the brand personality and positioning yet be flexible enough to cross musical boundaries of genres and styles. So when creatives slapped together a covid response commercial using cliché words such as “we’ve always been there for you”, or “we’ll get through this together” and Piano-String-Ensemble music was taken from stock libraries, where was the authenticity or trust? Interestingly though, as we analyzed the music usage of the brands within the Best Audio Brands, we noticed that brands were relying less on stock music than previous years. And that many brands that had a sonic identity started using it more consistently.





No handshakes, but elbow-to-elbow

From „Apart, but united“ © Mastercard, April 2020, Source: Instagram

When we first noticed the uptick in sonic identity usage, we accredited it to budget cuts. Marketers had been forced to cut spending on licensed music and told to reuse old musical assets. But when pairing those findings with the decrease in stock music, another picture emerged.

By relying less on stock music, brands have taken one step towards being authentic, but many brands still lack a sonic strategy. In the past brands looked at sonic strategy as having a sonic logo and maybe a corporate song or a jingle. However, having a sonic logo and/or corporate song is not a sonic strategy any more than having a visual logo and a slogan is a strategy. The brands that are leading the way when it comes to sonic branding have realized that having a holistic sonic identity is critical to being heard as authentic. A holistic sonic identity that is used across all audible touchpoints which can start building trust and brand equity.

Mastercard has created a sonic DNA leveraging the DNA ingredients in hundreds of musical pieces as well as across touchpoints such as their payment sound. Shell has taken a similar approach. This allowed both brands to create Piano-String-Ensemble music for their covid response commercials that felt more authentic as the melodies reflected the brand. The same can be said about HSBC covid commercials, although HSBC's sonic identity is lacking flexibility, as it relies on only one main melody. **Music can be the most powerful asset in a brand marketers' arsenal, as it affects us subconsciously.** We can close our eyes but not our ears. To utilize sound effectively, creative agencies need to start working closely with sonic branding agencies and see them as partners in building a strong holistic brand. As much as there is power in a well-executed creative commercial, the potential of a creative commercial utilizing a well thought out sonic strategy is even greater.



_100 BEST AUDIO BRANDS

_THE 2021 RANKING:
Key Findings
and Insights



_100 BEST AUDIO BRANDS

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

AUDIO BRAND RANKING SCORE
AUDIO BRAND EFFICIENCY

01 65,1
82 %



02 62,0
79 %



03 55,6
67 %



04 50,6
75 %



05 49,6
67 %



06 48,7
71 %



07 48,4
26 %

NETFLIX

08 46,2
72 %



09 45,0
65 %



10 44,7
66 %



11 44,0
68 %

SIEMENS

12 43,7
73 %

PHILIPS

13 43,3
68 %



14 42,8
69 %

intel

15 42,3
44 %



16 42,2
70 %



17 41,7
65 %



18 41,6
64 %



19 41,3
62 %

SONY

20 38,8
48 %

SAMSUNG

21 38,3
62 %



22 37,6
73 %



23 37,4
65 %



24 37,3
70 %



25 36,7
62 %



26 36,5
66 %



27 36,5
72 %
























28 36,1
73 %



29 36,0
71 %



_100 BEST AUDIO BRANDS: 30 to 100

30 35,9 68 % 	31 35,7 73 % BURBERRY	32 35,4 70 % 	33 35,3 70 % 	34 35,1 63 % 	35 34,7 71 % ZARA	36 34,7 68 % 	37 34,0 67 % 	38 33,5 65 % 	39 32,3 70 % TIFFANY & CO.	40 30,7 62 % 	41 29,8 68 % GUCCI
42 29,3 65 % Gillette	43 29,1 66 % H&M	44 29,1 64 % NESCAFÉ	45 29,0 66 % PRADA	46 28,8 65 % 	47 28,5 63 % 	48 28,1 66 % Kellogg's	49 28,1 58 % Canon	50 27,9 57 % 	51 27,8 64 % 	52 27,2 66 % Hennessy	53 26,6 60 % TOYOTA
54 26,5 65 % L'ORÉAL	55 26,2 65 % J.P.Morgan	56 26,2 68 % JACK DANIEL'S	57 26,0 67 % 	58 25,6 65 % DIOR	59 25,3 64 % 	60 25,1 62 % FedEx	61 24,6 61 % 	62 24,6 66 % Heineken	63 23,2 61 % 	64 23,0 61 % Spotify	65 23,0 60 % Panasonic
66 22,7 61 % 	67 22,5 63 % IKEA	68 22,2 57 % HONDA	69 22,0 63 % 	70 21,5 62 % PayPal	71 20,9 61 % 	72 20,8 60 % Budweiser	73 20,6 57 % DELL	74 20,5 62 % Uber	75 19,9 61 % 	76 19,6 61 % Ford	77 19,6 60 % Allianz
78 19,5 60 % accenture	79 19,2 61 % VISA	80 19,1 59 % citi	81 18,7 56 % 	82 18,4 60 % IBM	83 16,3 59 % Corona	84 16,0 59 % Pampers	85 15,9 59 % Colgate	86 15,4 56 % zoom	87 15,3 61 % Johnson & Johnson	88 15,2 60 % Nestlé	89 14,2 58 % ebay
90 14,0 57 % Hewlett Packard Enterprise	91 13,7 57 % Linked in	92 13,5 58 % 	93 13,4 57 % DHL	94 12,7 57 % Morgan Stanley	95 12,6 56 % SAP	96 11,4 54 % TESLA	97 10,8 57 % Goldman Sachs	98 9,7 56 % DANONE	99 9,3 55 % Adobe	100 8,8 55 % CISCO	



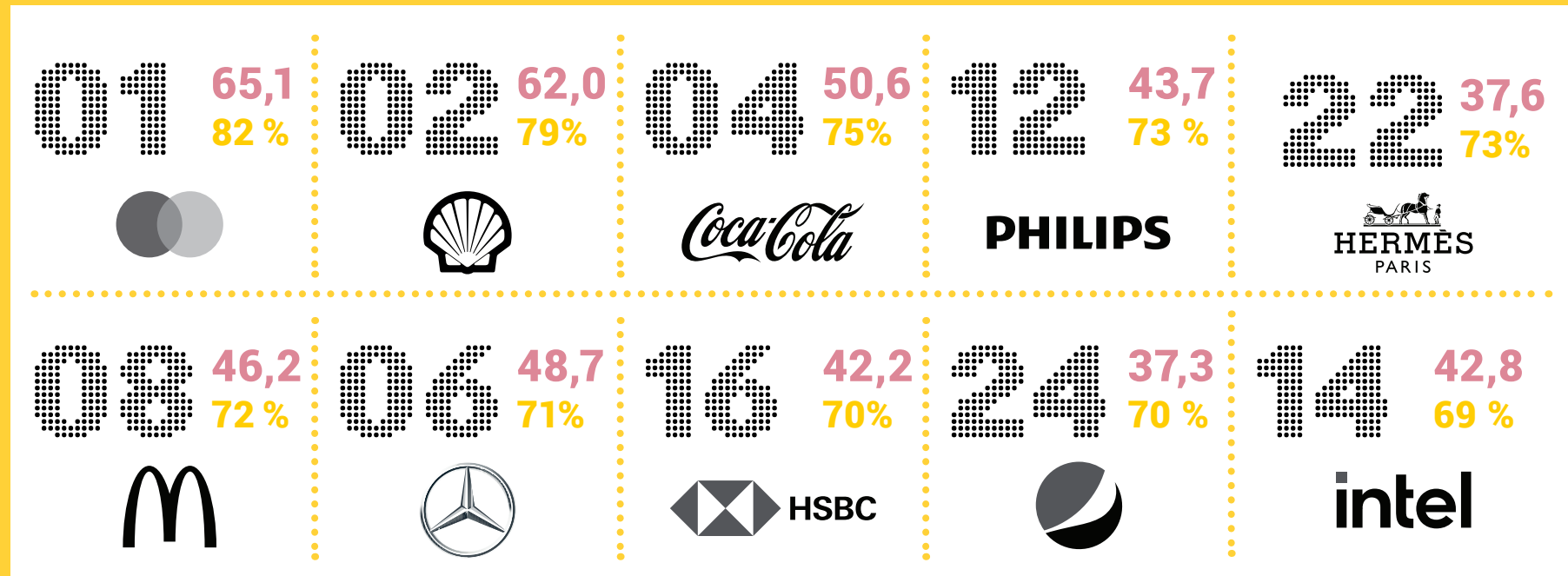
_General INSIGHTS

TOP 25 leap ahead

_THIS YEAR THERE ARE 33 BRANDS WITHIN THE RANKING that have a sonic logo and 16 of those brands are in the top 25. **On average the use of a sonic logo is remarkably higher in the top 25 brands compared to the rest.** 39% sonic logo usage by the top 25 while the average for the following 75 brands is 6%. Generally, we are seeing an increase in sonic logo usage from last year. In BAB 2020 the average usage was 10.5%, increasing this year to 14.3%. We see a slight increase between years of brands within the top 25 relying more on custom music and a decrease in in their use of stock music. Compared to the remaining 75 brands, the difference is clear: 46% custom for the top 25 vs 22% for the remaining 75 and 35% stock for the top 25 vs 55% for the remaining 75.



MOST EFFICIENT BRANDS in the Top 25



_LAST YEAR WE SAW A DROP IN EFFICIENCY

OVERALL, this year we see an increase. Considering the year we all had in 2020, it is no surprise that brands have become more efficient in how they use sound and music.

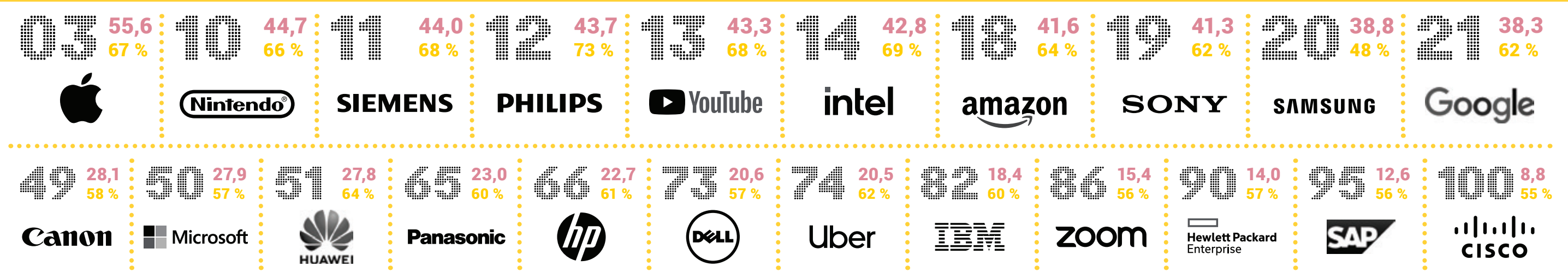
This year's ranking saw an increase in brands embracing sonic. Eight of the top ten most efficient brands have a sonic identity compared to seven last year. Furthermore, brands have realised that having just a sonic logo is not enough. Five of the ten most efficient brands have a holistic sonic identity. In other words, they incorporate their identity at more audible touchpoints, rather than just at the end of an ad.

This year Hermès and Pepsi are the outliers. Hermès is a special case as they release very few videos per year. The majority of which use custom music, the rest is licensed music. Last year we saw a drop in sonic logos with brands that typically used them in their content dropping from 56% down to 32.5%. This year, we see a slight increase, although the use of sonic logos is far from being as high as it was in BAB 2019. **Out of the 100 brands within the ranking, 33 brands have a sonic logo and use it on average in 44% of their material.** We saw a further decrease in sonic logo usage by its very pioneers, Intel & McDonald's. In 2020, we saw a dramatic drop. Intel decreased their sonic logo from 95% to 50% and

McDonald's from 95% to 44%. This year we saw a further 1% decrease by both brands, Intel down to 49% and McDonald's 43%. The overall increase between 2020 and 2021 can be attributed to the brands that have recently created a sonic logo or updated their existing one. **For any sonic logo to be successful, consistency is key**, especially at the beginning when brands need to hear the sonic logo as often as possible to make the connection between the brand and the sonic logo. It is therefore no surprise that marketers who have recently gone through the process of creating a sonic identity are especially diligent in using their sonic assets.



_Similarity WITHIN SECTORS



_THE TECH SECTOR HAS A VARIETY OF different brands ranging from hardware manufacturers such as Canon and B2B service providers such as SAP to conglomerates like Siemens. Even so, when it comes to how these brands use audio it can be divided into two segments. Brands that really think about how they sound and those that do not.

There are 22 tech brands in the ranking and ten of those are in the top 25. Six of those brands in the top 20 have a sonic logo. Siemens and Philips have a more holistic sonic identity that is woven into many of their audible touchpoints and music.

But having a sonic logo does not guarantee that brands will do well within this ranking. As more and more brands embrace a holistic sonic identity, having only a sonic logo is not enough. Canon has a sonic logo but it is only used in 27% of its material. The majority of music it uses on its digital platforms is uninspiring stock music making up 58% and the other 26% of its videos do not use any music at all.

For many of the tech brands there is a golden opportunity to embrace a holistic sonic identity and build audible brand equity by relying less on stock music.



_HIGH JUMPS **& low drops**

_THERE IS SIGNIFICANT SHIFTING IN THE RANKING between years of publication. The ten highest jumpers rise between 20 and 49 places in the ranking and the ten brands that have the biggest drops crumble between 29 and 55 places.

LOW DROPS:

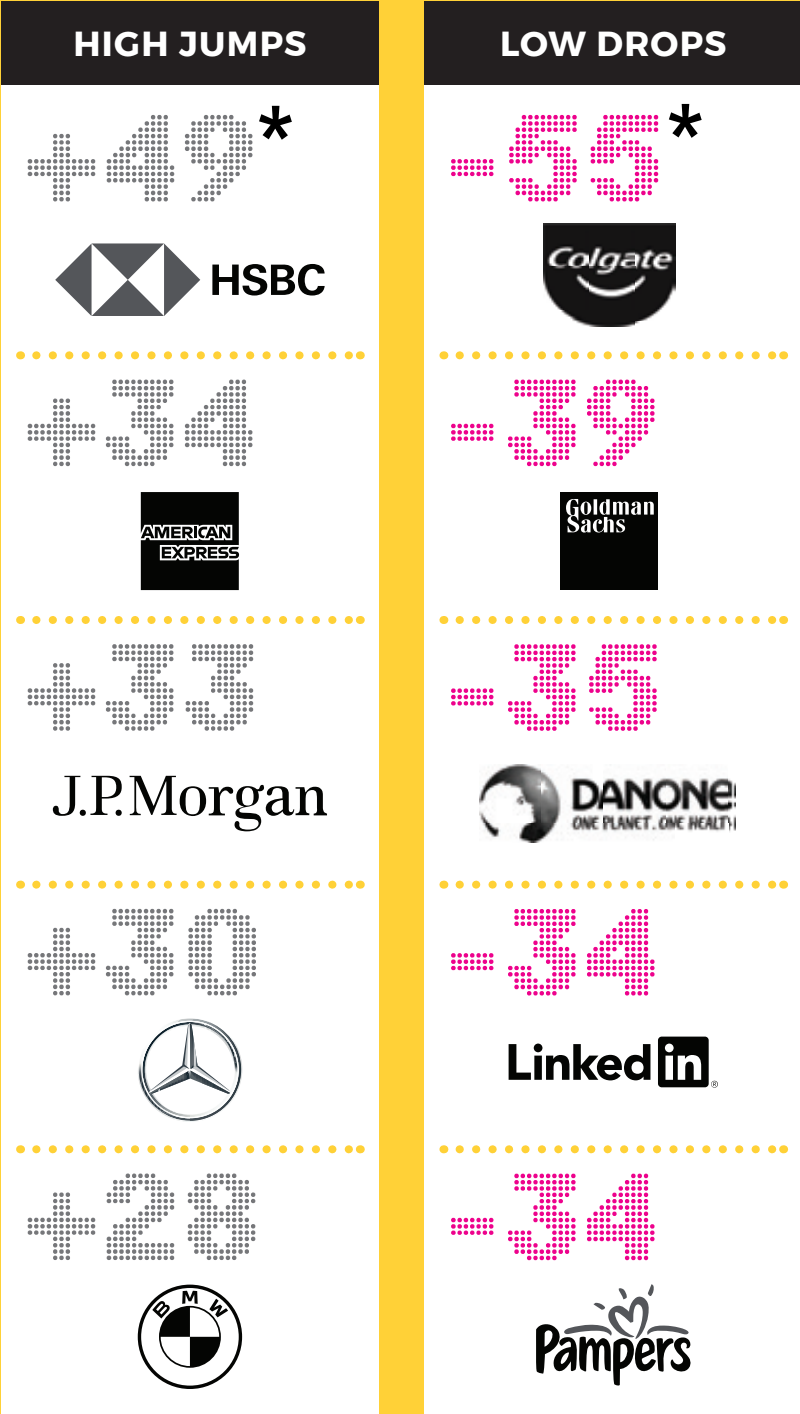
Colgate increased its use of stock music by around 50% compared to last year. A similar reduction can be seen in usage of licensed and custom music. **Goldman Sachs** increased its stock music usage by 16% and videos with no music now make up over 20% of all material on its digital channels. Danone last year used stock music in 38% of its material and this year the figure jumped up to a staggering 81% of stock music used in its material on digital channels.

HIGH JUMPS:

J.P. Morgan's success within the ranking can be partially attributed to its 40% increase in the use of custom music.

American Express released a sonic identity in late 2019. This year we see it using its sonic logo in 30% of its material. Additionally, 32% of its videos last year did not incorporate any music and this year that number has dropped to 3%.

The highest jump we see is from **HSBC**. In January 2019 it revealed its new sonic identity. But the rollout was slow. For this year's ranking we saw a notable increase in the usage of their sonic identity. It used its corporate song in 19% of its material and sonic logo usage increased sharply from 22% to 81%.



* BAB rank difference to last year



Things to consider when updating a sonic logo: **MELODIC VS NON-MELODIC LOGOS**



WHEN BRANDS UPDATE THEIR SONIC LOGOS, it is important they consider consistency. There are two notable examples from last year: Intel and Nissan. Brands with hugely different sonic logo strategies.

Intel changed its corporate identity in 2020 and it was its boldest change in decades. Its sonic logo that had been used since 1994 had seen a gradual change over the years, making sure it was always sounding fresh and modern. In 2020 its sonic logo strategy underwent the most drastic change seen so far. Intel kept its sonic **→logo** but it also introduced multiple alternative versions of the sonic logo (examples can be heard **→here** and **→here**). These versions can be used for different parts of the company or meet the needs of the story or music that comes before the logo.

Nissan on the other hand has changed its sonic logo at least a couple of times over the last decade (**→2010**, **→2012**, **→2014**, **→2018**). In 2020 it changed it yet again along with its visual logo (sonic logo can be heard **→here**). With such frequent changes it is hard to assume that Nissan has managed to build any real brand equity with its sonic logo.





Melodies help consumers memorize a **BRAND SOUND**

The 2020 version is an updated version of its 2018 sonic logo. Gone is the sound of the engine and instead there is a voice with some sound effect. All there is left is the kick drum that is supposedly meant to sound like a heartbeat. Using a drum to sound like a heartbeat is a common cliché when it comes to sonic logos (for example, →**iHeartMedia**, →**GSK**). The removal of the engine sound is most likely meant to signify Nissan's transition from combustion engines to electric vehicles.

Studies have shown that sonic logos that utilize melody strongly outperform those that don't when it comes to memorability. It is therefore no surprise that 21 out of the 33 brands within BAB this year that have a sonic logo have a melodic one. Nissan's logo was not, and is not, based on a melody. We conducted a small experiment to see if respondents would be able to recognize if Nissan's new sonic logo was indeed by Nissan and if they could make the connection to the new one being based on the old. In short, respondents were not

able to make the connection that it was for the same brand nor that the new logo was a derivative of the old one. If brands opt for a non-melodic sonic logo, it is vital that when changing the sonic logo it is a gradual transformation, if brand equity is meant to be kept. Melodic sonic logos give brands much more flexibility to change their sonic logos to make sure that it always fits the context. Therefore, brands that are thinking of creating a sonic logo should aim to base it on a melody.





INDUSTRY	AVERAGE BAB INDEX	DIFFERENCE BETWEEN YEARS
ENERGY*	62,03	10,55
BEVERAGES	39,00	8,15
AUTOMOTIVE	33,95	7,84
LUXURY	33,18	4,73
APPAREL	31,88	5,19
RESTAURANTS	31,87	3,16
MEDIA	31,33	4,22
TECHNOLOGY	29,39	7,27
SPORTING GOODS	28,68	1,97
FINANCIAL SERVICES	25,00	5,90
ALCOHOL	23,49	2,15
FMCG	21,17	0,01
LOGISTICS	21,05	6,58
RETAIL	18,36	-7,75
DIVERSIFIED	13,15	1,06
BUSINESS SERVICES	12,50	5,74

* Only one brand within the sector

_INDUSTRIES
between years

_WHEN COMPARING THE AVERAGE SCORE OF VARYING INDUSTRIES,
it is evident that brands in general are doing better with sound. We see an increase of average BAB score in all sectors except two: retail and FMCG. FMCG scored the same as last year, while the retail sector scored 7,75 points lower than it did in 2020. This is hardly surprising with retail being one of the hardest hit by the covid crisis. If we look at how the sectors are ranking in comparison to 2020, the majority have held their position with Retail, Business Services, Diversified and Logistics bringing up the rear once more.



_PODCASTS

a new advertising paradigm

_TEXT AMANDA DI MARCO, VERITONIC

_PODCASTING HAS BROUGHT AN ENTIRELY new approach towards advertising. Radio ads have traditionally been (and still are to a certain extent) bold, forward and abrupt using sound effects and music to grab your attention. Podcasting on the other hand, delivers a more intimate setting and connection with the host, almost as if you were having a conversation with a friend. Brands have recognized that the tone of ads should follow suit. Rather than just capturing this observation with the human ear, the Veritonic Competitive Intelligence platform is helping us see and understand that clearly with data.



amp

_THERE IS A TREMENDOUS AMOUNT of data proving the increased relevance and trust of an ad delivered as an endorsement by a host

Looking at all podcast and radio ads (across all industries) in the last 90 days, the data showcases these differences:

_SPEED: Podcast ads are far slower. Podcast ad averages 180 words per minute, while radio averages 184 words per minute.

_CLARITY: Marginal differences however podcast ads are scoring a 97 vs 96 for radio. The slowed down speech is allowing the message to come through more clearly and accurately.

_EQUALITY: Podcasts are making an important shift towards a more equalized V0 distribution. Radio on average only has 16% female-only voiced ads, while podcasts are increasing that number to 33%.

_DURATION: podcast ads, specifically driven by host-read ads, are longer on average with 50.8% of ads coming in at 60 seconds, while only 18.2% of radio ads reach 60 seconds.

The other large industry debate is around host-read vs. produced (or voice-over) ads tied to the increase of dynamic insertion and enhanced targeting capabilities around podcast ads. There is a tremendous amount of data proving the increased relevance and trust of an ad delivered as an endorsement by a host, however it is not as scalable. With the enhanced technology for the dynamic insertion of ads, we are seeing an increase of produced ads coming through the platform and data is supporting their performance against important metrics of recall, intent, and key emotional attributes such as 'likeable' and not 'boring'.

Another observation is the dispersion, and the impact podcast advertising has on the B2B industry. 13% of podcast ads sourced in the last 90 days are B2B services while only 9% of radio ads sourced are B2B.

TOP SECTORS IN RADIO WITH UNIQUE ADS AND SOME KEY TRENDS:

1_ TIER 1 AUTO

Highest percent of male-only V0 at 61% and one of the highest speeds at 187 words per minute. Also, a category with some of the longest ads with 23% at 1 minute

2_ RETAIL - HOME FURNISHINGS & SUPPLIES

Highest of the top 5 for words per minute, predominantly 30-second ads at 55.9%

3_ INSURANCE PROPERTY & CASUALTY

Utilize male + female (dual-voice V0) the most of the top categories at 45%. Also highly focused on 30-second ads at 57.5%.

4_ QSR

Heavily male-only V0 at 57% of ads

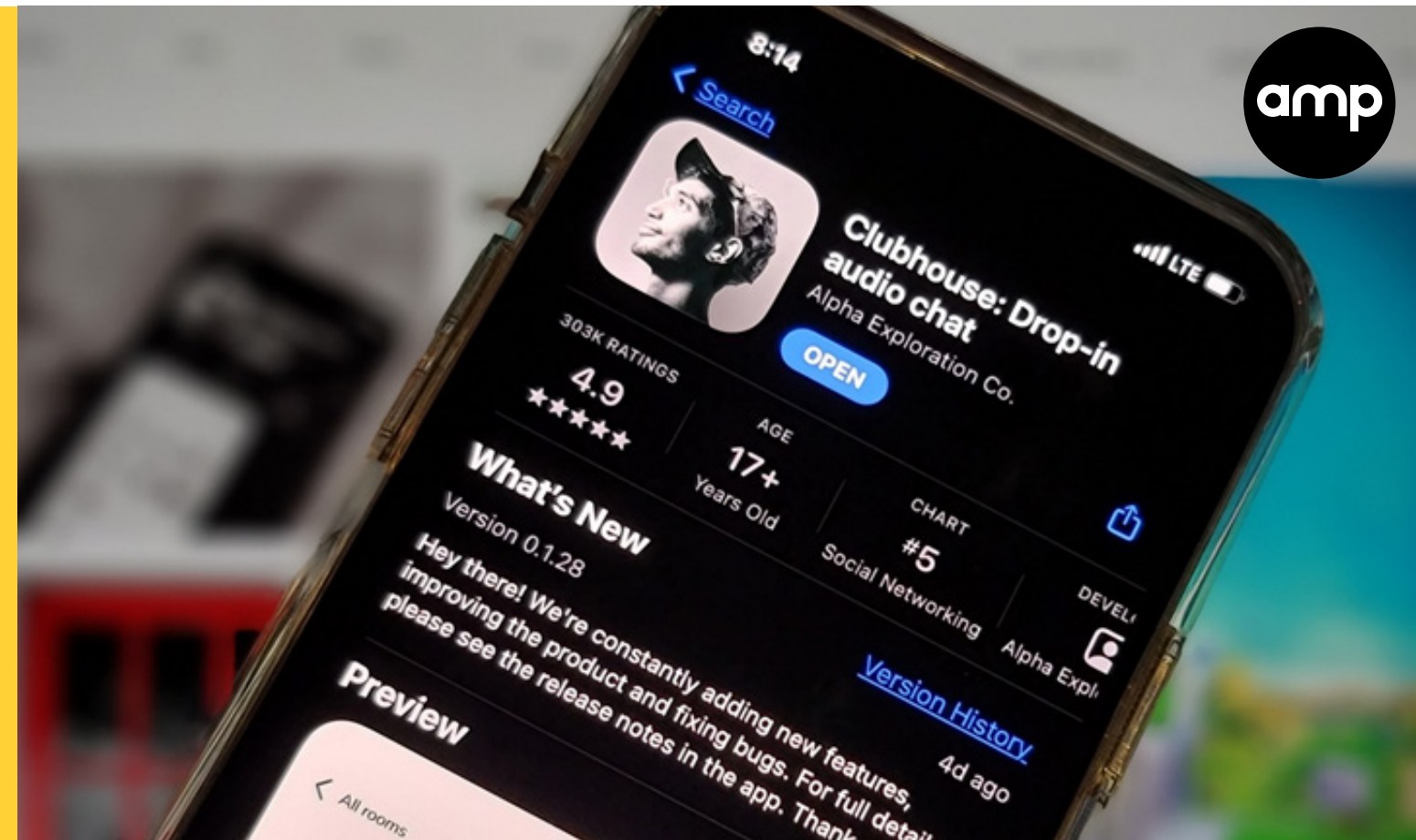
5_ B2B CAREERS

45% male-only V0 and one of the slower spoken categories at 179 words per minute, 44% of ads are ~15 seconds which breaks the mould of some of the other top categories



_SOCIAL AUDIO PLATFORMS: Fad or Future

_TEXT MICHELE ARNESE, AMP



_WHAT DO MARK ZUCKERBERG, MC HAMMER, AND VLADIMIR PUTIN HAVE IN COMMON?

They are all on Clubhouse, the drop-in audio app taking the world by storm, with a valuation of \$4bn and 13.4 million users gained in the space of a year. But it isn't the only app trying to win your ears. A recent report identified 33 different social audio start-ups. Big existing players like Twitter and Facebook are entering. Sonar, Chalk, and Discord are in the space. Upstart Wavechat is positioned as the "Snapchat of audio". CozyRoom is utilizing spatial and immersive audio to create a fun way to chat with friends. And the list goes on.

In other words, social audio is facing an upward trajectory. The pandemic may have teed up a screen-fatigued, isolated audience for social audio net-

works, but the plot was already in motion. Podcast listenership and streaming music platforms have been on the rise for a decade, and thanks to the popularization of smart speakers, headphones, and other audio hardware, it's now easier than ever to broadcast conversations to the wider world.

This means brands should be plugging in their earphones. Consumer attention in social media tends to be fleeting, but using audio means the content is sticky, engaging, and amplified by the human voice's pathos. It's fertile ground for building stronger consumer relationships, particularly as it catches an audience which has explicitly chosen to carve out time in their day to listen.

Brands who invest their time in social audio apps now could see a big payoff in the future. Current-

ly, most audio platforms are ad-free, but as their user bases become more established, it's entirely possible that could change. New tools, functionalities, and analytics could be just around the corner. Predictions for features that could benefit brands include sponsored rooms, audio adverts and e-commerce opportunities.

To prepare for that, brands need to be thinking about how they sound now. Without the aid of visuals, finding influencers or voice actors that reflect your brand will be on many agendas as well as looking at options like AI to have an aligned and engaging social audio presence. **In the end, branding is about storytelling. And what better way to tell a story than with your voice?**



_Embracing AI in your **SONIC** **STRATEGY**

_TEXT MARKUS SCHWARZER, CYANITE

In this article I will present common inefficiencies in music decision making and how AI-powered music analysis systems can lower risk, speed up the decision-making process and letting every brand grasp the vast opportunities connected with a good brand sound strategy making sure that every sound piece is “on-brand”.

_MARKETING TODAY IS DOMINATED BY NUMBERS AND STATISTICS. Modern marketers make informed decisions based on vast amounts of data points. Distribution of ad assets is monitored, recipients tracked, and communication effect quantified.



ARTIFICIAL INTELLIGENCE AS A KEY TOOL TO HELP brands differentiate sonically

The utilization of this data mostly happens via AI systems. **In fact, over 80% of marketing decisions today are made with the help of AI.** Music is none of the above. It is highly subjective, hard to quantify and thus the individual perception and overall marketing effect is almost impossible to project. Due to music's low quantifiability, many global companies shy away from using it as a means of communication and branding; thus missing out on the vast opportunities connected to a consistent and successful brand sound strategy. The high-risk aversion with brand sound strategies:

Research shows that, in fact, 24% of F500 companies do not use music at all in their branding – more than 50% of which because they fear the risk of a potential backlash connected with the wrong usage of sound or because it is too hard to estimate ROI. The same research suggests that many branches

within the FMCG industry (cleaning products) did not move out of their comfort zone for decades, staying rather generic amongst various players in the industry and lowering their ability to stick out and be memorable.

Many global brands who do in fact use music do so in a hypersensitive way, being aware of the potential negative implications of "off-brand" sound. Three central results are:

_many people are involved in the ineffective process of music decision making.

_many marketing dollars are spent not on distribution but on audience panel testing.

_repeated and dull music campaigns with low communication effect are made due to risk aversion.



_CREATING A MORE OBJECTIVE VIEW for the decision-making process on sound



Often, music is changed in an ad due to low test scores. Mostly, this is done after the production of the ad, leading to high inefficiencies and cost in post-production. This is particularly present when brands don't trust their sound branding agencies and get too much involved into the decision-making process. The process itself then tends to be shaped by the individual preference bias connected to music. The discussion revolves less around the "rightness" of a song but more around whether the decision makers like it or not.

How AI-powered systems can help setting up a consistent brand sound strategy: **Modern deep learning systems are capable of understanding the emotional effect music has on its recipient.** By ingesting and learning vast amounts actual music, listeners reactions to various music styles and genres, these AI-systems can extract a precise profile of the specific emotions carried in a piece. Today's biggest usage of such systems you will probably find in recommendation algorithms in consumer facing music services like Spotify or YouTube.



MAKING SOUND AND MUSIC A CORE, MEASURABLE ELEMENT of the everyday brand toolbox

Newer ultra-precise systems increasingly find their way into the realm of sound branding. These systems can go deeper than just basic emotions like 'happy' or 'sad' but can actually retrieve information about the brand-fit of music – ex-ante instead of ex-post with testing. They look at the full arrangement of a piece, the frequencies and volumes evoked by the instruments and look for sound qualities leading them to estimate the emotional effect. Just like humans, the AI “listens” to the song and can directly tell the mix of conveyed moods, the genre as well as used instruments, key, tempo, or harmonies.

The AI will use these deep analytics to give insights into abstract emotions that go in line with a brand's values such as adventurous, optimistic, sophisticated or futuristic etc.. Music professionals use those insights to create detailed sound profiles of songs and make informed and sound music decisions.

However, most important is the ability to project the overall effect of the song on the target audience. Based on the music analysis insights, the AI can now visualize musical emotions enabling decision makers to understand a song without having to listen to it. It's not a subjective discussion about preferences anymore but about degrees of brand-fit making communication effects quantifiable.

When utilized in setting up a brand's sound strategy, the AI would first rate how “on-brand” you already are by analyzing your current sound assets. If there is a discrepancy between your target and your status quo, the AI will recommend songs that will lead you to communicate your brand values more consistently. In a last step, the AI rates bespoke compositions and rates their brand fit. This way, AI enables music to find its way into the everyday toolbox of data-driven marketing departments and every brand of every size to easily grasp the benefits that come from communications with sound and music.

BENEFITS:

- 1_ **Information about sound-brand-fit BEFORE the expensive production of ad assets.**
- 2_ **Detailed profiles shedding light on the sound-brand-fit.**
- 3_ **Making a brand's sound more experienceable and quantifiable.**
- 4_ **Clear discussions without the bias of people's preferences.**
- 5_ **Estimating ROI of more expensive music licenses.**



_Auditory User Interface – **BEYOND JUST DIGITAL**

_TEXT JESSICA REININGER, AMP

_A GROWING NUMBER OF DIGITAL SERVICE PROVIDERS have recognized the importance of having sounds applied to the customer journey “beyond the dimensions commonplace in digital user experiences” (Emily Bowman, Global Director of Customer Experience Design for Chevrolet, Buick, GMC, Cadillac, and OnStar). Besides brands within the safety and security area like SimpliSafe and Abode, in which shorter sounds are necessary to a certain extent, other brands like Amazon, Apple and Google use the opportunity to implement sounds to enhance the customer experience.



_50% OF USERS WOULD RATHER OWN EXPERIENCES featuring premium sounds than experiences featuring generic sounds

With products that allow the implementation of UX/UI sounds, consumers are exposed to a vast number of different types of sounds. Amongst others, these include mechanical sounds (i.e., the shutter on a camera), confirmation or failure sounds where the consumer receives a direct response while using the product, informational sounds (i.e., for navigation purposes) or status alerts about an event that needs to be monitored (i.e., a device has low power).

To get the benefits of having all these sounds, brands must take care not to create any kind of noise pollution. Experiencing sounds as noise can change “the affective states negatively compared with silence”¹ and lead to the opposite effect of what a brand might want to achieve. Sounds should only be implemented if they serve a purpose, such as requiring the user to act, pay attention or give the user a good feeling (i.e., of achievement that payment is made).

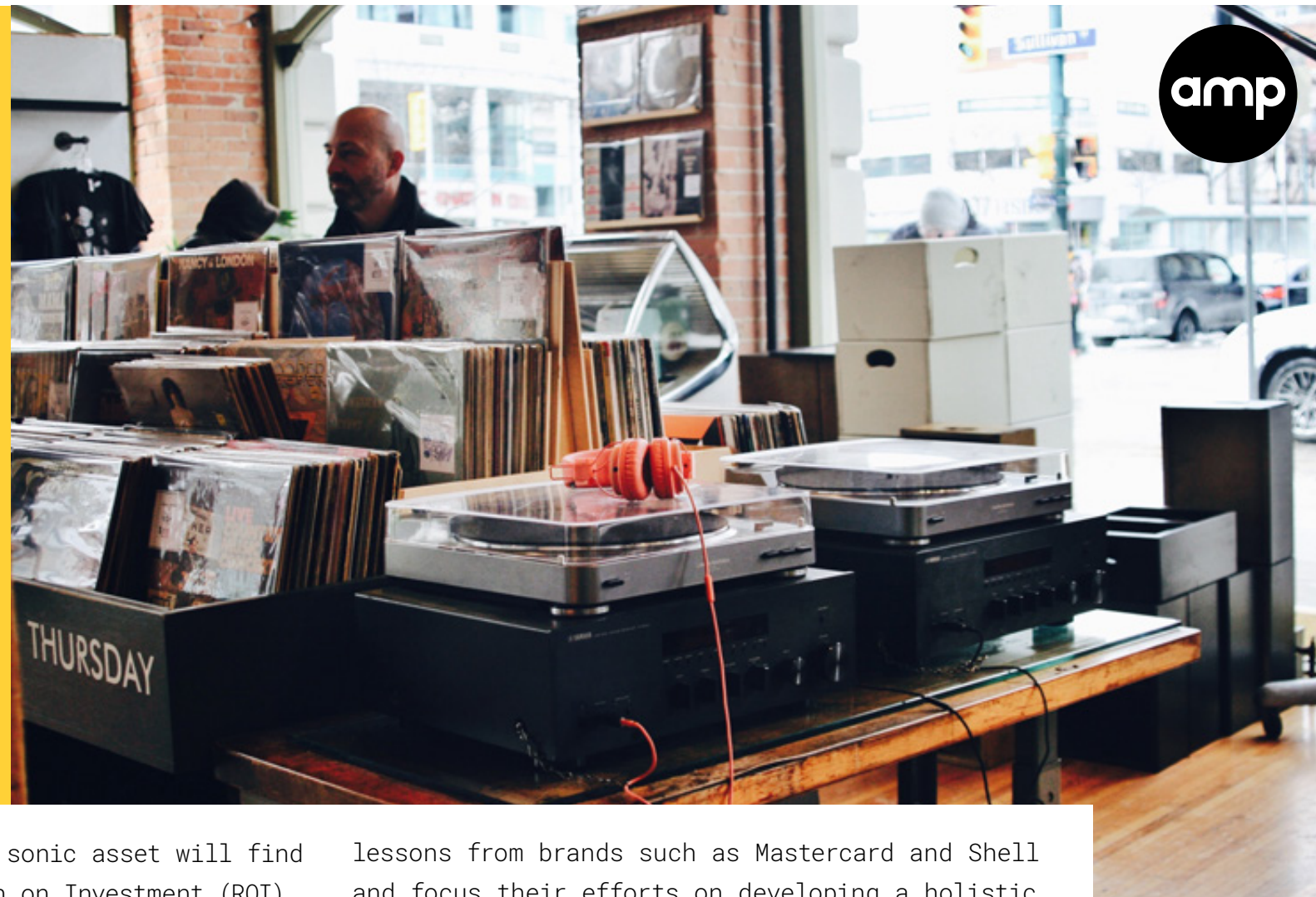
The best way of avoiding sounds being perceived as noise is to make sure the sounds have the right tonality and are derived from the brand when it’s developed. Research shows that sounds which are designed as part of a unified experience are 10x more effective than sounds created in isolation². That’s why brands should approach audio experiences from a holistic standpoint to improve product usability. Furthermore, brands should avoid using stock UX/UI sounds and instead create a recognizable and memorable sound signature, using unique melodies that are key drivers for brand recall. It’s proven that 50% of users would rather own experiences featuring premium sounds than experiences featuring generic sounds.³ This is independent of whether we consider ourselves as “trained” or “untrained” listeners - a human can recognize good sounds from bad sounds⁴.



¹Hoon Sin Yoo & Da Young Ju (2017) “Auditory User Interface Guideline For Emotional User Experience” ²Tiziana Quarto, Giuseppe Blasi, Karen Johanne Pallesen, Alessandro Bertolino, Elvira Brattico (2014) “Implicit Processing Of Visual Emotions Is Affected by Sound-Induced Affective States And Individual Affective Traits” (2014) in: PLoS ONE

³<https://auxnyc.com/blog-posts/earcons-small-sounds-mean-big-business> ⁴Audio Talks – a Podcast by Harman. Episode: The Art of Active Listening

_CONSISTENCY AND AUTHENTICITY are key



_BEST AUDIO BRANDS RANKING 2021 shows that during this turbulent year, many of the world's biggest brands have started to consider how they sound, ensuring the music they use is a good brand fit. Yet for others, potentially because of budget cuts, stock music became the default use. While many brands have developed a sonic strategy this year, for most there is still an opportunity to either start that journey or to expand their current strategy to a more holistic approach. This will become increasingly crucial as we move into a 'more heard than seen' branded world with its numerous audible touchpoints. Relying on a single sonic asset is no longer fit for purpose. The sonic canvas is growing, and

those brands using a single sonic asset will find they face a dwindling Return on Investment (ROI), as their assets are unable to adapt to new customer interaction needs. A sonic identity needs to be built around numerous ingredients that can be used for different applications and fit together as a whole. A sonic DNA is far stronger than relying on just a sonic logo, corporate song or a jingle. The quick rise of Mastercard last year and HSBC this year, demonstrates that companies who want to harness the power of audio can do so relatively quickly but it needs to be used consistently. Especially at the beginning while consumers are learning the branded sonic cues. Those looking to improve their standing can draw

lessons from brands such as Mastercard and Shell and focus their efforts on developing a holistic sonic strategy. This would enable them to future-proof their Sonic Ecosystem and adapt it to new contexts and customer experiences, some of which we cannot even imagine today.

We have already started working on the next Best Audio Brands 2022 with data from 2021 and our **"amplify" magazine**. We are certain that the next Best Audio Brands ranking will increasingly show the time is now to embrace a holistic sonic identity. A journey that many brands have already begun this year. We can't wait to find out which brands will take the plunge and perhaps even find themselves in that 2022 top spot. **Stay tuned!**

_GLOSSARY

_SONIC DNA®

The Sonic DNA is the audible expression of a brand. It sits at the core of a brand's Sonic Identity and is the source of all brand specific musical ingredients (brand melodies, riffs, harmonies, voice and instruments).

_SONIC IDENTITY

The Sonic Identity is the audible equivalent to a visual identity. It is a holistic brand sound ecosystem guaranteeing consistency, brand recall and maximum flexibility across all sonic consumer touchpoints.

_SONIC ASSETS

Audible assets derived from the Sonic DNA, tailored to the needs of a specific touchpoint or consumer experience (music tracks, sonic logo, UX/UI sounds, product sounds, voices, etc...).

_SONIC WATERMARKING®

Sonic Watermarking is the process that weaves elements of a Sonic DNA into a custom piece of musical content. In this way, each custom track created can support or emphasize specific storytelling, whilst ensuring clear audible brand recognition.

_AUDIO BRAND RANKING SCORE

This score is based on five of the six pillars we defined for our Best Audio Brands methodology: Experience, Trust, Belonging, Recognition, Engagement/Satisfaction. The combined evaluation of these factors constitutes the final score. Beyond any sonic brand assets, the score also takes into account product sounds and voice applications.

_AUDIO BRAND EFFICIENCY

The estimated Return on Investment (ROI) of every dollar spent on music and sound for audio-visual content on digital channels and TV. Measured against our benchmark of a brand that owns their Sonic Identity and uses unique and reusable Sound Assets strategically across all audible touchpoints. .

_OWNED MUSIC

Made for and owned by the brand, recognizable across all touchpoints including elements of the Sonic DNA.

_CUSTOM MUSIC

Piece of music exclusively composed for a campaign or consumer experience.

_LICENSED MUSIC

Licensed music which is part of the world repertoire (non-exclusive).

_PUBLIC-DOMAIN LICENSED MUSIC

Music that is not protected by copyright, but license is needed for the master rights. (non-exclusive).

_STOCK MUSIC

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

_PRODUCT SOUND

The use of sound across products and services to enhance or guide the user experience.

_PRODUCT VOICE

A voice created to truly reflect the holistic identity of the brand.



_ABOUT AMP

_AMP is the world's leading, full-service agency for sonic branding. With its award-winning **Sonic DNA®** approach, the agency sets the new standard for making brands heard globally. United by a passion for music, sound and technology, **amp's** multi-cultural and multi-faceted team collaborates with some of the world's most influential brands to create meaningful and authentic audible customer experiences that build measurable brand equity and trust.

amp is designing the sound of brands for this new decade of audio.

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_CONTACT US

PRESS & MEDIA

Simpatico PR Ltd.
WeWork Aldwych House,
71-91 Aldwych, Holborn
London, WC2B 4HN
Tel +44 (0) 20 8858 6324

Kaylee Butler
Account Executive
kaylee.butler@simpaticopr.co.uk

Esme Horwood
Senior Account Executive
esme.horwood@simpaticopr.co.uk



METHODOLOGY

amp GmbH
Sandstrasse 33
80335 Munich
Germany
Tel +49 (0) 89 23 23 89 90

Irina Milojević
Communication Manager
irinamilojevic@ampcontact.com

Bjorn Thorleifsson
Head of Strategy & Research
bjornthorleifsson@ampcontact.com





www.ampsoundbranding.com

USA

457 Grand St, Ground Fl
Brooklyn, NY 11211

747 Clementina St
San Francisco, CA 94103

EUROPE

Sandstr. 33 80335
Munich, Germany

ASIA

Haerbin Road 160, Tower A,
Room 312 200080 **Shanghai**

10 Raeburn Park
Level 3 #28, 088702 **Singapore**