



THE SOUNDOUT INDEX 2023

UNITED STATES EDITION

Sonic brand tracking of 135 brands 2021-2023
Brand campaign soundtrack analysis
Analysis of sonic strategy and Gen Z

THE SOUNDOUT INDEX 2023**THE DEFINITIVE SONIC BRAND TRACKING REPORT**

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INTRODUCTION

Emotional associations are what distinguish powerful brands from businesses that simply sell on price.

We all know from experience that music is the most potent medium to reinforce or alter our emotional state. Neuroscience has also proved that different music directly excites key reward centres in the brain, subconsciously altering mood, triggering connections and hardwiring associations.

Music is therefore one of the most potent weapons that brands can use to build emotional bonds with consumers - and effective brand management should include strategically managing your brand's sound and music.

But until recently selection and management of music usage has been overwhelmingly subjective and all but impossible to measure, and therefore effectively manage.

This has now changed. In this report we objectively measure how well 135 US brands are managing their music usage – both on a strategic, sonic branding basis, but also in the music they use for marketing.

We also reveal why brands are failing to reach Gen Z with sonic branding, and approaches you can adopt to counter this.

'If you can't measure it,
you can't manage it'

- **Peter Drucker**



WHY BEING ON BRAND WITH MUSIC IS IMPORTANT

Being on brand means projecting a consistent brand image and personality across all consumer touch points – and this includes music.

New research, released last month by System 1, the leading advertising effectiveness prediction company (and in conjunction with Mark Ritson ([Read Here](#))) demonstrated comprehensively the importance of advertising being on brand.

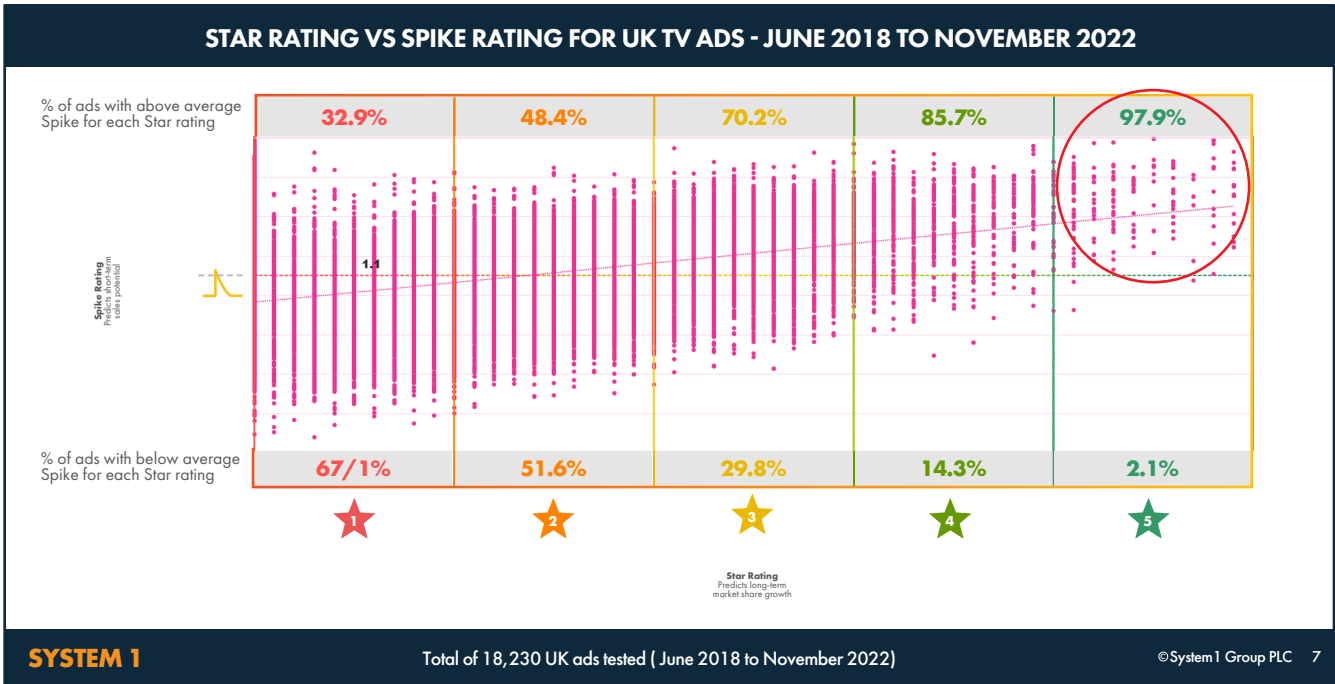
After analysing over 18,000 commercials over the past 4 years they found that **98% of all advertisements that were excellent (ie 5*) at building brand also delivered above average short term sales lift.**

'Long-term brand building is the ultimate strategic BOGOF, ensuring shorter-term impact as well as longer-term benefits.'

- **Mark Ritson**

97.9%

97.9% of 5-Star ads also achieve above average Spike; focus on the long and the short (almost always) takes care of itself.



It follows that if the music you use in your branding and marketing resonates with the desired personality of your brand you will not only build your brand but will also drive above average short term sales activation. Being on brand with your music in both sonic branding and in the music you use in marketing has never been more important.

HIGHLIGHTS - KEY FINDINGS

While this report includes a host of information and only includes a fraction of the data we have collected on each brand, there are 10 highlights:

- Attribution is everything in sonic branding – and rapid growth in attribution is the cleanest metric to understand which brands are succeeding in creating that Pavlovian connection between the logo and the brand itself. 8 established brands have grown attribution by over 20% in the past 2 years, and only one of these does not have the brand name in the sonic logo.
- Compared to 2021 we now see many more brands breaking the 80% attribution benchmark. In 2021 only 4 brands had achieved this. Now we have 15 brands with attribution above 80%. This underlines the significant increase in investment in sonic branding over the past 2 years.
- Looking at almost 30 new sonic logos released in the past 2 years, only 10% have yet reached attribution of over 20%, underlining the time, marketing and strategic investment required to create a distinctive brand asset in sound.
- Brands are struggling to increase sonic brand attribution with Gen Z. For the top 50 US brands the average increase in attribution is just 6% for Gen Z but 15% for the over 25s. This is because Gen Z are not present in many places that brands are promoting their sonic brand. To reach Gen Z you need to target TikTok.
- On TikTok, use music that is on trend and viral (or something similar). The power of the music can elevate your brand to a level of exposure on TikTok far beyond what is achievable with almost any other music selection. Our data reveals what Home Depot have achieved.
- Brands need to be both on trend and on brand on TikTok. A failure to do this risks a brand doing the corporate equivalent of 'dad dancing' – not a good look, and one that can be damaging to the brand.
- A minority of brands have made great music choices in their recent advertising, reinforcing the personality of their brand – demonstrating a truly joined up approach to sonic strategy.
- TikTok's new sonic logo, launched in October 2022 has already achieved 70% recognition and 47% brand attribution with Gen Z. This has been achieved in the same way as Netflix built their logo into an iconic logo – by repeatedly exposing users as part of their app experience.
- New research this year demonstrates that music that builds brands also drives short term sales uplift. It has never been more important that both your sonic brand and the music you use in marketing is on brand.
- Of the top 20 most recognisable sonic brands, only 2 do not include the brand name in the sonic logo ([Netflix](#) and [Little Caesars](#)). While a purely musical logo may be more elegantly attuned to brand personality, it is also significantly less effective. It may be time to let soundtracks in commercials do the brand personality heavy lifting and focus on recognition and attribution with the logo.

**THE SOUNDOUT
INDEX 2023 –
THE LARGEST EVER STUDY
OF US SONIC BRANDS**

The report is underpinned by over 150,000 consumer studies and represents the most rigorous tracking study ever conducted on sonic branding and sonic marketing.

It represents a benchmarked sonic audit on 135 US brands, brands which have already recognised, on some level, the power of music by already committing to a sonic identity.

Perhaps the most dramatic findings are around Gen Z consumers and how brands are failing to reach them with sonic branding. We explore this in detail in sections 10 and 11 below.



108 of the brands have used a sonic logo for at least 2 years, enabling SoundOut to measure and rank those that are growing fastest in terms of recognition and attribution. A further 27 have been released in the past 2 years and for these we have measured the level of traction they have achieved to date.

In addition we have tested the soundtracks to brand campaigns run in 2022 against over 200 brand attributes and measured the match between these soundtracks and the core brand personality as defined by 27,000 consumers. This reveals which brands are effectively staying consistent with their music in marketing communications, over and above their core sonic logo/jingle.

The [2021 SoundOut Index](#) reports explored the emotional and musical drivers behind effective sonic logos. This SoundOut Index explores and explains how the adoption of a holistic sonic strategy across all music used in branding and marketing can deliver both increased brand equity and sales uplift.

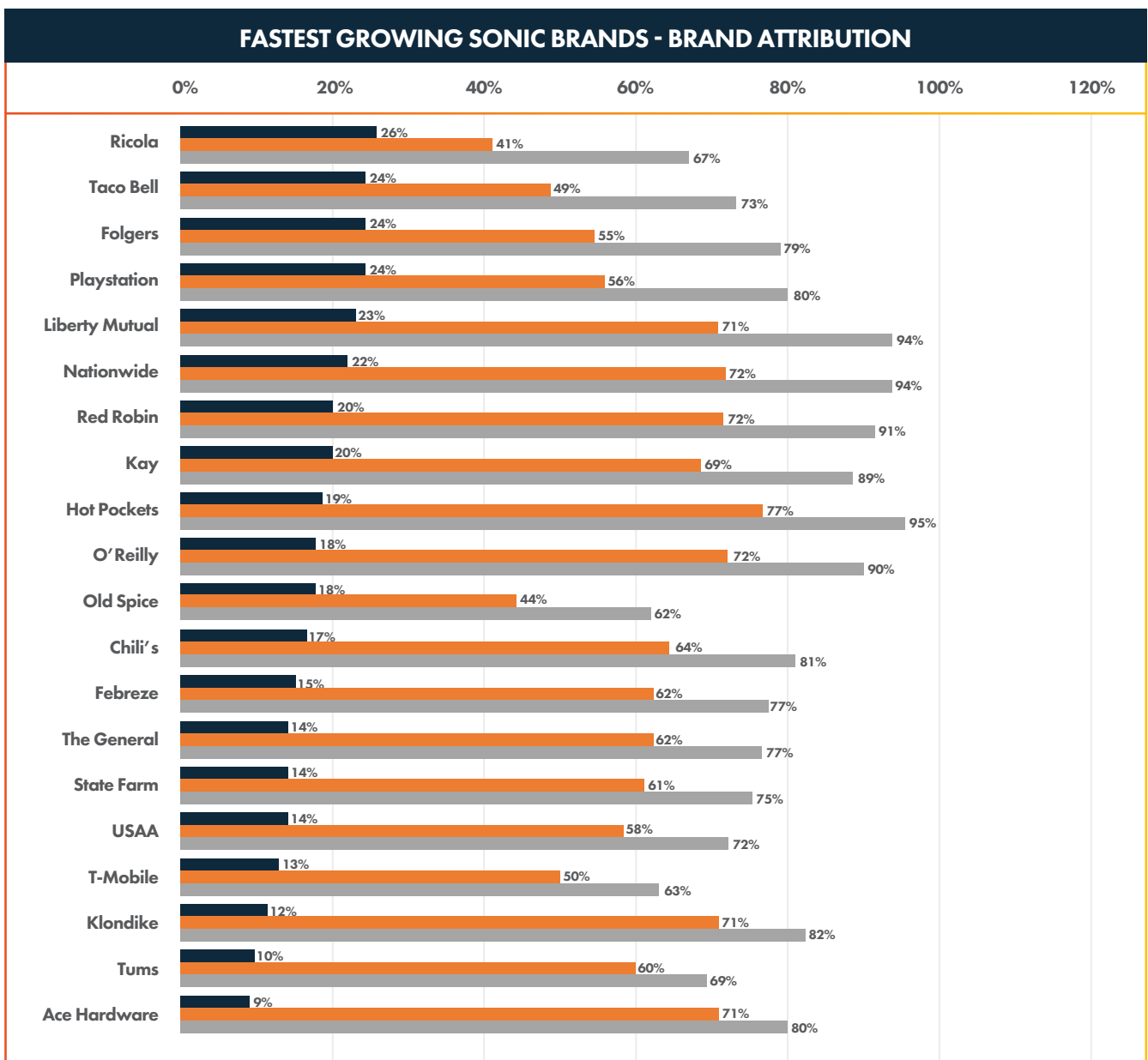
**SONIC BRAND TRACKING:
THE FASTEST GROWING
SONIC BRANDS
2021 -2023**

The challenge with testing sonic logos is that some have been around for 50+ years while others have only been around for a couple of years.

Attribution is everything in sonic branding – and rapid growth in attribution is the cleanest metric to understand which brands are succeeding in creating that Pavlovian connection between the logo and the brand itself.

To measure the fastest growing sonic brands we took the percentage of consumers who could, unprompted, name the brand in 2023 and compared this to our results in 2021. The absolute percentage uplift in attribution is a direct reflection of how successful each brand has been in increasing the direct link between the sonic logo and the brand itself over the period. This is, in effect, a sonic brand tracker and is the best measurement of success in sonic branding:

■ Increase ■ 2021 ■ 2023

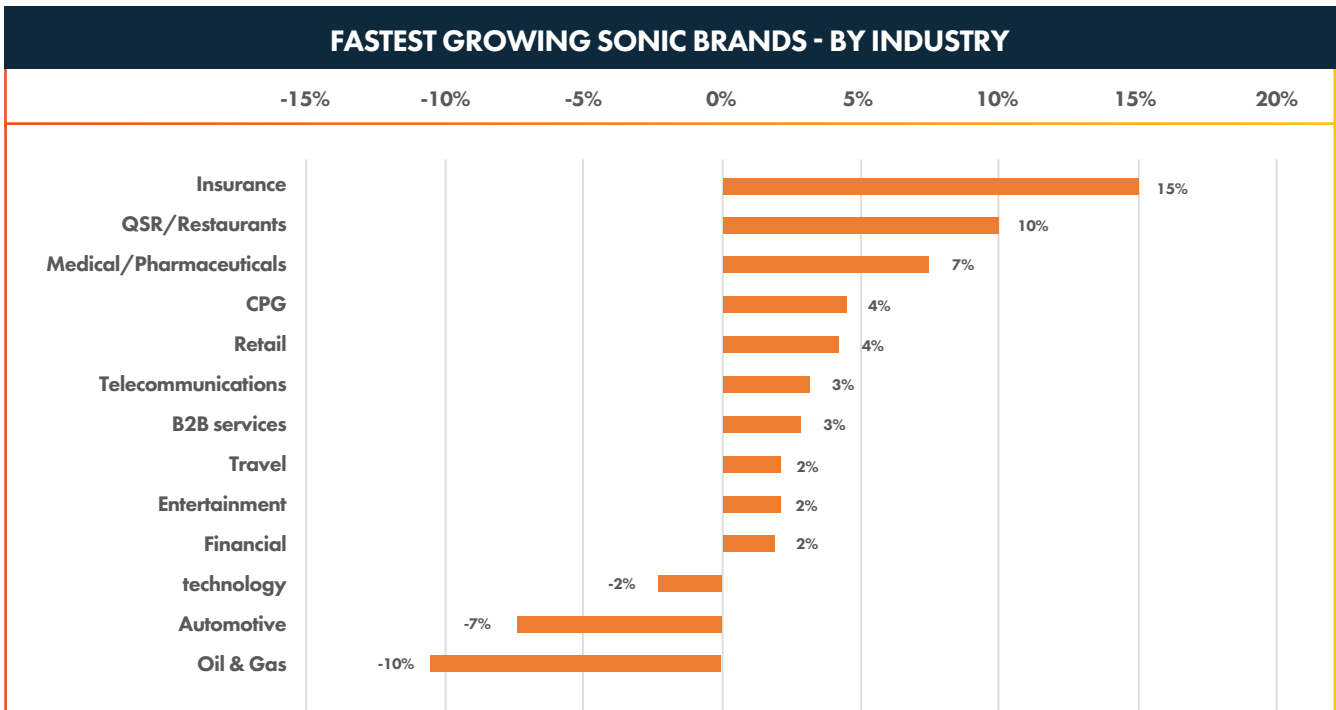


Other than [Taco Bell](#), all top 10 logos feature the brand name in the logo – which of course makes attribution significantly easier for consumers. However, no less than 8 brands with already strong attribution ratings have grown overall attribution by more than 20% in the US market – a remarkable achievement in a relatively short 24 month period, suggesting they have consciously elevated the importance of their sonic brand through an effective marketing strategy.

Growth by industry

When we look at the data at an industry level we can see where the true battlegrounds are for sonic supremacy:

■ Increase/Decrease 2021 - 2023



It's the insurance sector that has been pouring most resources into their sonic branding over the past couple of years. With an average 15% increase in attribution across the 11 brands included in the index. Only 2, [AXA](#) and [Travelers](#) have registered decreased attribution over the period.

QSR/Restaurants come in at second place with [Taco Bell](#) and [Red Robin](#) both registering 20%+ gains in attribution while, at the other end of the scale the 8 automotive companies covered averaged a net 7% drop in brand attribution over the 2 year period.

THE TOP 20 MOST RECOGNISABLE US SONIC LOGOS

So, regardless of when they were released, what are the best known sonic logos in the US? The table below shows overall brand attribution and the increase/decrease in attribution of these sonic logos over the past 2 years.

■ Overall
 ■ Change

Overall Rank	Change 2021 - 2023		-20%	0%	20%	40%	60%	80%	100%	120%
1	+6	Hot pockets								
2	+8	Nationwide vocal								
3	+11	Liberty Mutual								
4	-2	Arby's								
5	+6	Red Robin								
6	+3	O'Reilly								
7	-6	Goldfish								
8	+8	Key								
9	-5	AutoZone								
10	+3	Klondike								
11	-5	Farmers								
12	-7	Netflix								
13	+5	Chili's								
14	+13	PlayStation								
15	-3	Ace Hardware								
16	+12	Folgers								
17	+15	Pandora								
18	-10	Little Caesar's								
19	+2	Febreze								
20	+0	The General								

Compared to 2021 we now see many more brands breaking the 80% attribution benchmark. In 2021 only 4 brands had achieved this ([Goldfish](#), [Arby's](#), [Pandora](#) and [AutoZone](#)). Now we have 15 brands with attribution above 80%.

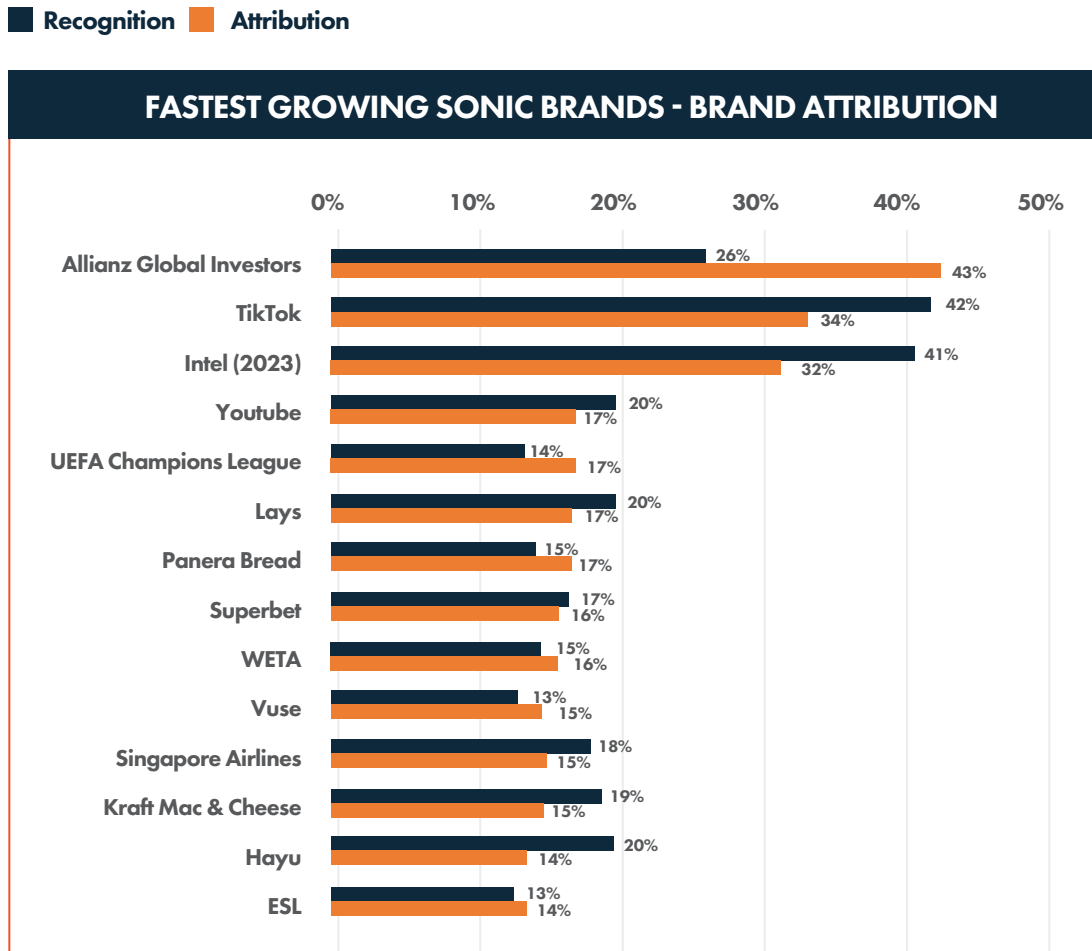
This underlines the significant increase in investment in sonic branding over the past 2 years, not only in the creation of new sonic identities but a more strategic approach to effectively and repeatedly exposing these to consumers.

To retain a position in the rankings it is not sufficient to stand still in terms of attribution. Brands need to persistently drive increased recognition and attribution. For instance [Little Caesar's](#) has increased attribution by just 2% but dropped 10 places down the table from 2021. In contrast, [Red Robin](#) has increased attribution by a huge 20%, and risen 5 places, comfortably overtaking Little Caesar's in the process.



**NEW KIDS ON THE
BLOCK: THE FASTEST
GROWING NEW
SONIC BRANDS**

For new sonic logos released in the past 2 years, we don't have a completely level playing field as some have been around for almost 24 months while others are only recently launched. But leaving that aside, this is how they are all faring:



Here we have plotted both recognition and attribution, as for some logos the prominence of the brand name means that attribution is easy, even if the consumer has never heard the logo.

However there is still an opportunity for misattribution—for instance a meaningful number of consumers wrongly attributed the [Pandora](#) (radio) logo to the jewellery retailer. While [Allianz](#) heads the table on attribution this is principally due to the brand name being front and central in the logo.

It is perhaps better to look at the recognition performance as this shows how deeply the new logos have seeped into the public psyche and, on this metric, it's [TikTok](#) that takes the honours – more of that in the following pages. [Intel's](#) updated/tweaked sonic logo is a close second – but it leans heavily on almost 30 years of iconic in market usage.

It is also worth noting that for almost all brands, building meaningful recognition and attribution is a marathon not a sprint, for all 27 tested, only 3 break the 20% attribution hurdle. Building a distinctive brand asset takes time, money and persistent marketing and requires a clear strategic focus.

THE MOST EFFECTIVE SOUNDTRACKS IN BRAND CAMPAIGNS

So far we have looked at highlights from the world of sonic branding, but now we turn to music used in marketing and examine which brands are making appropriate music choices in the soundtracks they pick for commercials. While not every brand in our Index has released a commercial in the past 12 months, over 75% have.

At the start of this report (section 2) we discussed the new System1/Ritson findings that demonstrate that a commercial that builds brand will almost always also drive above average sales activation. It follows that brands should almost always ensure that their commercial is on brand, regardless of whether they are seeking short term sales activation or long term brand building.

We tested the soundtracks of the latest commercials on our AI OnBrand platform in isolation and then, using our [BrandMatch](#) technology (that precisely matches music to brands across over 200 brand attributes), compared the personality of the commercial soundtrack to the personality of the brand (as defined by consumers). The top brands who are using music most effectively in their commercials are as follows:



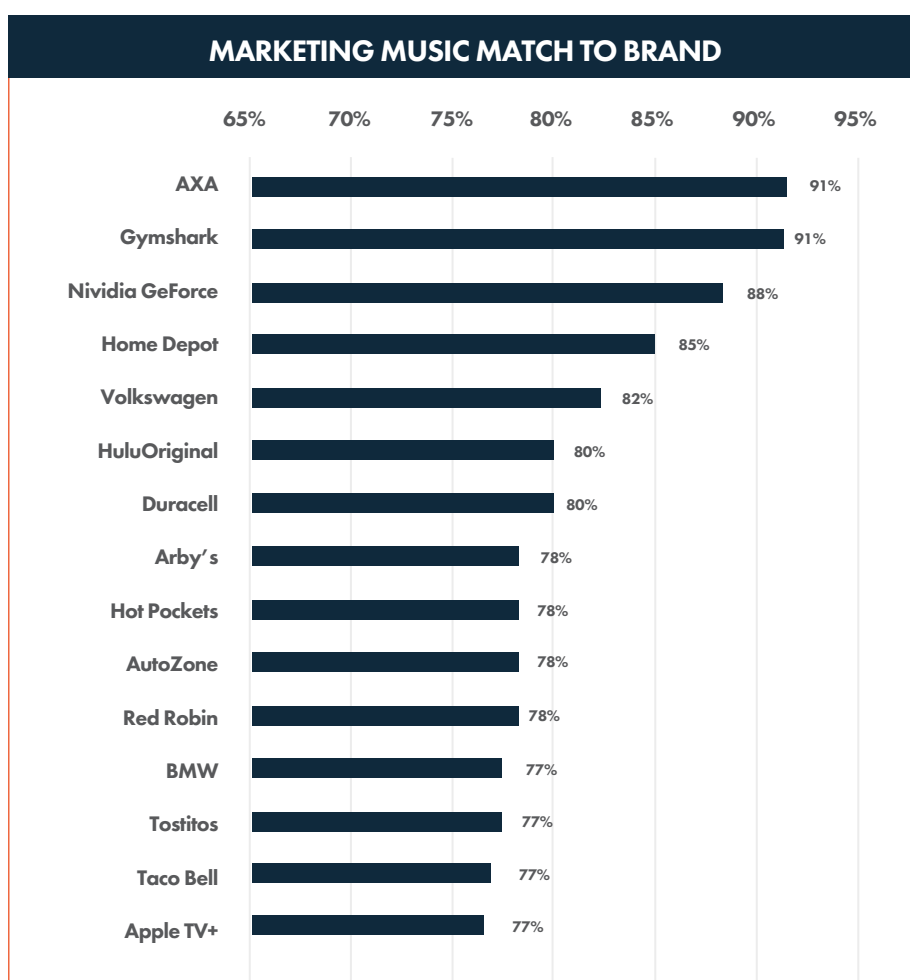
Through luck or judgement, the above brands are demonstrating a great ability use music that resonates with their core brand personality, something that is essential in building brand value over time and driving short term sales activation.

**THE BRANDS BEST
DEMONSTRATING A
JOINED UP SONIC
STRATEGY**

Having an integrated music strategy is something that more and more brands are now recognising is both possible and, for many, essential.

That not only includes their sonic logo but also the music these brands are using in their commercials. A brand with a holistic sonic strategy will ensure that the personality of the brand being projected across all consumer touch points is consistent and being on brand with your marketing music is essential. As a result, effective brand management includes strategically managing your Brand's sound and music.

In the table below we have averaged the closeness of personality match between each brand and its sonic logo and each brand and the music it used in its most recent marketing. The resultant score illustrates which brands are best demonstrating an integrated music strategy.



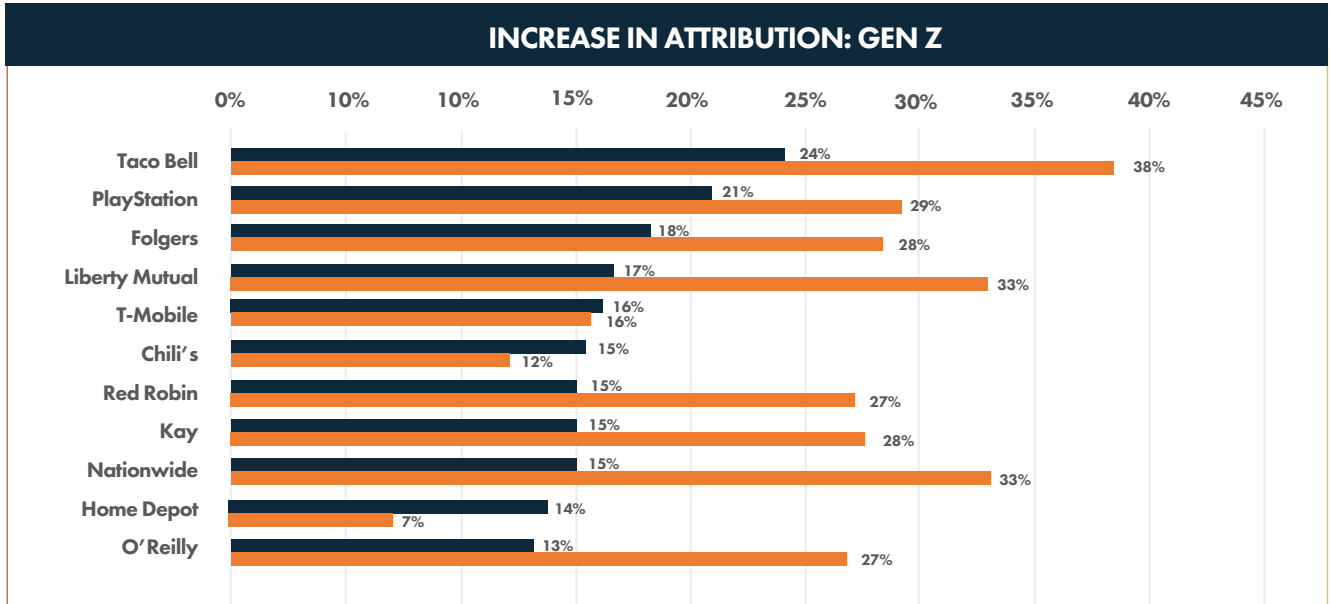
We regard an excellent personality match as being at 75% or higher, so all the above brands are exhibiting, by accident or design, an excellent execution of their sonic strategy. 20% of these are fast food restaurants, suggesting that it is companies in this sector that has the best approach to sonic strategy.

While [AXA](#) are at the top of the table in terms of matching their sonic logo and their marketing music to the core AXA brand personality, their sonic brand attribution is almost at the bottom of the table (at just 5%) – suggesting that while they have excellent potential in sonic branding they are not yet investing sufficiently in their sonic brand to drive meaningful awareness.

THE GEN Z CHALLENGE

Up until this point all the results presented are on the basis of a gen pop average. However when we look at Gen Z versus the over 25 year olds there is a dramatic contrast:

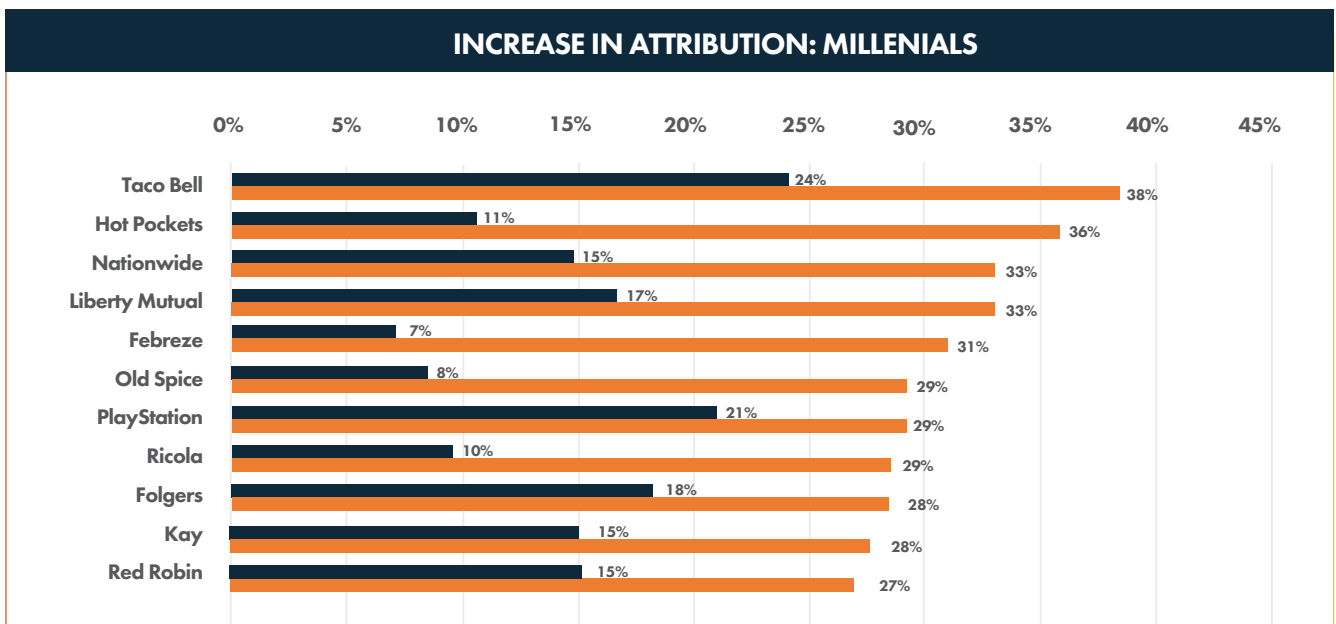
■ Gen Z ■ >25



The huge disparity between increased attribution for Gen Z and the over 25s is striking – as is the remarkable result for Home Depot – what are they doing to target Gen Z? Whatever it is – it's working. We'll explore how they have achieved this later.

And here are the fastest growing sonic brands for the over 25s:

■ Gen Z ■ >25



Taco Bell is clearly killing it across all demographics and whatever it is doing to push the sonic brand – it is working, but in common with all others, much better with the over 25's than with Gen Z.

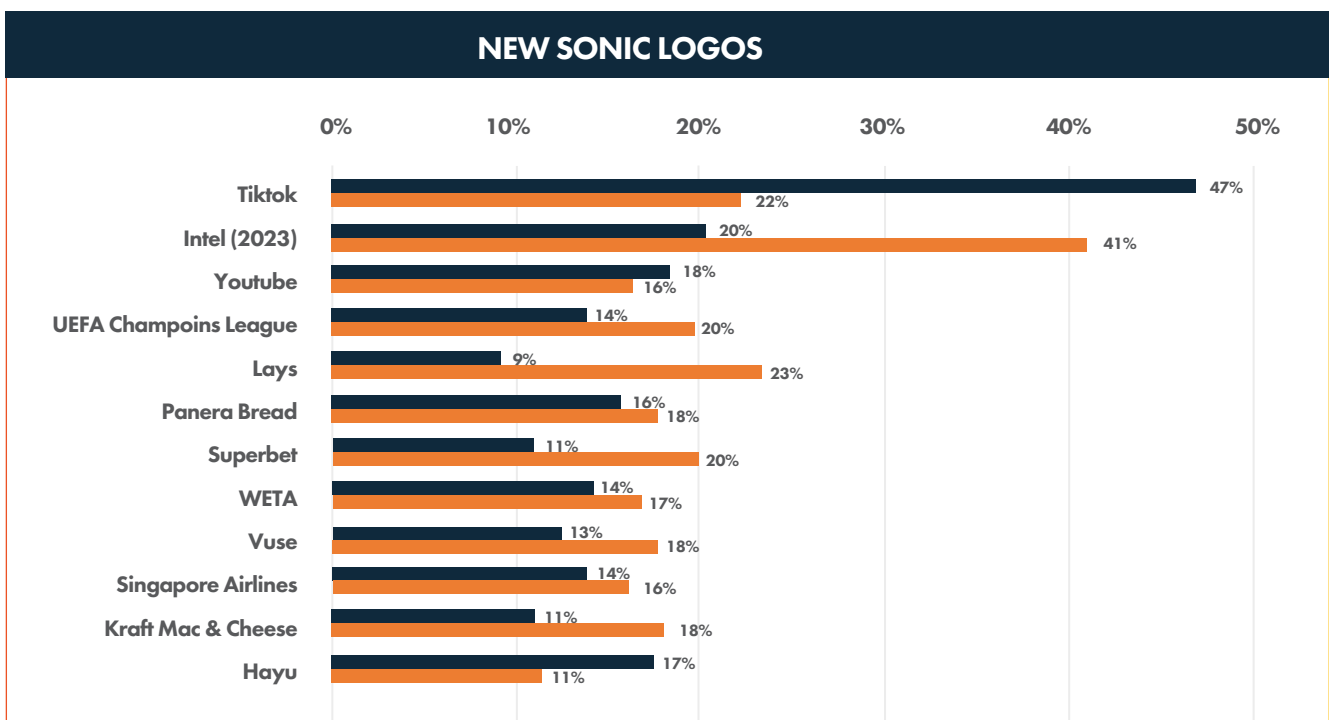
However, one thing is immediately clear: the increased awareness for Gen Z across almost every brand is significantly lower than for the over 25s. Indeed even for the top Gen Z brands, the average increase is 25% for the over 25s but only 17% for Gen Z.

When we look at the fastest growing brands with the over 25s it is even more evident with average increase for the over 25s at 31% against just 15% for Gen Z. Digging deeper, if we look at the top 50 US brands in each category the average increase in attribution is just 6% for Gen Z but 15% for the over 25s.

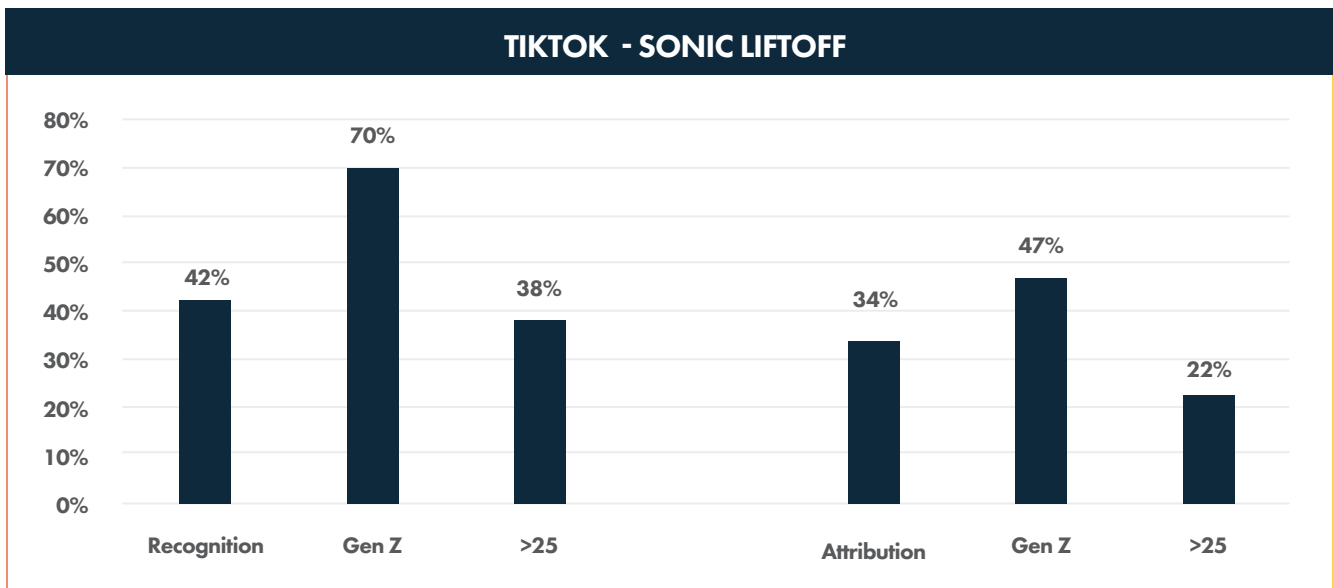
If we go even further and look at all 108 brands that have had a sonic identity for over 2 years the overall average attribution for Gen Z has increased by just 2%, with many brands registering decreased attribution over the period. Either Gen Z are wired differently from the over 25's or they are getting significantly less exposure to sonic logos in their media journeys.

So what is happening with newly released sonic logos, is it the same story there?

■ Gen Z ■ >25



One thing immediately jumps out here – not only is [TikTok](#) massively outperforming any of the other new sonic brands in the index, it is hugely bucking the trend with demographic attribution by Gen Z at almost 50% just 5 months after launch – over double the over 25s.



This is a classic example of the [Netflix](#) sonic strategy, playing the sonic as an integral part of the service, ensuring repeat exposure to the target audience at zero marketing cost. If your product or service allows it, it is the single most effective approach to creating a distinctive sonic brand asset.

[Hayu](#) is also doing a good job with Gen Z attribution much stronger than the over 25s.

But if we exclude TikTok and Hayu the average attribution is 17% for the over 25s, and only 11% for Gen Z. Gen Z are missing in action.

There really is only one conclusion to be drawn from the above – brands are not reaching Gen Z as frequently on more traditional broadcast and digital channels because they simply are not there. In the next section we will explore how brands can best reach them with on brand sound.

**TARGETING TIKTOK –
ALWAYS BEING ON
TREND AND ON BRAND**

We have established that brands are failing to properly connect with Gen Z in their sonic branding efforts, and suggest that this is not because sonic logos are not registering but because their attention is elsewhere, somewhere most brands have not yet reached.

Gen Z represent 32% of the world's population and spend an average of 105 minutes a day on TikTok with 20% of Gen Z report spending a whopping 5 hours or more on the platform.

While optimizing all music used in marketing is essential, brands do need to be marketing in the right location to ensure they are being exposed to the right audience, and if its Gen Z you want you influence, you must be on TikTok. Which takes us back to Home Depot. How did they manage to register double digit increased attribution with Gen Z, dwarfing their increased attribution with the over 25's?

The answer is of course TikTok. The Home Depot 'beat' went viral on TikTok in 2019, not because Home Depot engineered it, just because it happened. In July 2022 Home Depot (finally) launched its own TikTok channel, with viral videos including one re-creating the company's theme song solely using Home Depot products, instantly welding the Home Depot brand to one of the most long lasting viral sounds.

This is a rare (and perhaps the only) example of an existing sonic logo powering brand attribution, rather than the other way round – and it's very powerful indeed.

Following Home Depot's lead, while you may not be able to engineer a virally powered bump in brand attribution with your own sonic logo, there is no reason why you cannot do it with the music you use in your TikTok campaigns.

If you use music that is on trend and viral (or something similar) the power of the music can elevate your brand to a level of exposure on TikTok far beyond what is achievable with almost any other music selection. This is because the TikTok algorithm hugely boosts posts that feature trending music, and this results in far greater exposure for your brand, at marginal additional cost.

Here at SoundOut we test all top 100 trending TikTok tracks every week and make these available for matching to your brand on our OnBrand music marketing platform. Brands then define their brand and campaign objectives and can identify at any point in time the tracks are both on trend and on brand to use on TikTok campaigns.

To demonstrate this here are trending TikTok tracks from this week (March 2023) that are great personality matches to some of the brands featured in this report:

Brand	Track Links	Personality Match
TikTok	We Are The People (southstar Remix) - Empire of the Sun	95%
Duracell	Trap Money so Big (Remix) - Muhamad Iqbal	89%
Ford	Horn Of Plenty - James Newton Howard	87%

Brands get this, with 85% planning on increasing their TikTok marketing spend in 2023. Crucially, according to TikTok, the number 1 most important element in a TikTok campaign is music and sound. It is the only audio-first social media platform.

But brands need to be both on trend and on brand on TikTok and a failure to do this risks a brand doing the corporate equivalent of 'dad dancing' – not a good look, and one that can be damaging to the brand. In short, getting the music right for campaigns on TikTok is more important than anywhere else in the marketing universe. Never has the right music been so important in marketing.

How quickly will your brand embrace TikTok? The clock is ticking.



**A GUIDE TO
STRATEGICALLY
BUILDING BRANDS
WITH MUSIC**

Consistency leads to brand authenticity, which in turn builds trust – and trust is what underpins brand equity. While brands obsess over every other aspect of brand image and creative execution, music is frequently left entirely to the marketers. Harnessing the power of music at a strategic level can contribute significantly to both brand equity and marketing effectiveness.

Key Takeaways:

- Sound, and music in particular, is the only sense that speaks directly to the emotional subconscious. As a result it is the most powerful way for brands to emotionally connect with and influence consumers.
- Recognising this, many brands are now exploring a strategic approach to music to ensure they deliver emotional brand consistency across both their branding and marketing activities.
- To do this effectively brands must first formulate a sonic strategy, to ensure that the music they use communicates a consistent personality at all consumer touch points.
- Without a sonic strategy you risk either being consistently wrong or being inconsistent with your music choices – both of which could damage your brand and marketing effectiveness.

Ever since the birth of radio, sound - and music in particular – has been harnessed by brands in advertising. Whether that was to embed a distinctive brand asset in the minds of consumers (ie a jingle/sonic logo) or to reinforce the storytelling by echoing the emotional arc of the commercial, music was a pervasive element of almost all brand communication.

Then came cinema, TV, the internet and smartphones; and audio, while still important as a marketing element, often lost its way from a strategic brand perspective and instead became solely focused on supporting the storytelling.

This has become all too entrenched – we were recently told by a leading global creative agency (in front of the client) that insisting that music used in advertising needed to be on brand would severely compromise creativity and the effectiveness of advertising.

The response, by the client, is one that all brands should take on board. They said that while the music must of course support the creative, by insisting all music was also on brand they would avoid all of the (many) music selection mistakes that damaged brand value.

Thanks to audio assistants and the explosion of audio interfaces, sound-only interactions with consumers are steadily increasing. This is leading to brands reassessing their use of music. There is a recognition that while they have poured decades of strategic investment into ensuring their brand is consistent across all other brand assets, the strategic use of music has been left behind.

So, if you think it may be time to get more strategic with music, where do you start?

How do you create a sonic strategy and how do you execute on it?

Over the past couple of years we've often asked this question of clients. And all too often we are met with blank faces. Some, who are more secure in their roles, admit that they don't have one.

It's hardly surprising. For most, they are about to create their first sonic identity – and this is the first time they are thinking of sound as a strategic medium. But just having a sonic identity is not a strategy, it is simply an additional creative element that can be deployed to help deliver on the overarching brand strategy.

Fortunately, for most brands, they already have the foundations of a sonic strategy – they just don't know it yet. Your brand will always be more recognisable than your music and core brand strategic goals should inform your music strategy. Music should support and extend this, not lead. It should be in harmony with your core brand positioning.

So, you already have the strategic framework – it's the existing brand strategy (and if you don't have one of those you should stop reading now and go back to basics).

But music is rooted in emotions and speaks directly to the subconscious. So a sonic strategy should focus on the element of brand strategy where music can work most effectively – where it can reinforce core attributes, brand archetype – i.e. brand personality. Simply put, your music must always be consistent with your brand personality – if it achieves that it will support and further your over-arching brand strategy.

A sonic strategy is therefore a thread that runs through your business and anchors the use of music to your brand personality at every consumer touch point, from sonic brand, to sonic marketing, to live consumer events.

What does good – and bad – sonic strategy look like?

Just Eat is an example of a brand that is flawlessly executing on a music strategy. Take their [latest ad, with Katy Perry](#). Just Eat have been both bold and smart with this. As with the previous Snoop Dogg campaign, they have again separated the music from the artist. As with Snoop Dogg, they have persuaded a globally recognised superstar to sing about their brand. So, while the brand completely owns the song, Katy Perry is immediately perceived as a genuine fan of the brand – she loves it so much she made a song up all about it – the ultimate endorsement.

This is turbo charged influencer marketing, and way more powerful than slapping an existing Katy Perry track on a Just Eat advert. That would have simply created a personality tug of war between the Katy Perry brand and the Just Eat brand. Furthermore, by successfully executing with a second global superstar, Just Eat have just created a unique franchise that can be extended to other superstars either globally or regionally over the years ahead.

And if we were to take a look at a music strategy that didn't do so well? [Bob Dylan and Victoria's Secret](#). You may love Bob Dylan but this video/music pairing comes across as barely legal teenager meets creepy uncle in a highly sexualised yet totally inappropriate execution. There are four personalities at play here: the Victoria's Secret brand, the model, the music and Bob Dylan. The music would probably work fine in isolation, but with Bob actually in the commercial, the model and Bob Dylan become the main focus - creating a personality clash that is uncomfortable to watch.

Katy Perry saying she loves Just Eat is entirely credible; Bob Dylan indicating he loves Victoria's Secret may also be credible – but it's no way to sell lingerie.

Implementing your sonic strategy

A sonic strategy should support both your branding and marketing strategies.

Sonic Branding

It's a simple proposition – make sure your music consistently communicates the personality of your brand. But this is not a slam dunk - and is easier said than done.

The first step is to ensure you have a clearly defined brand personality, something that any brand worth its salt will already have done – to ensure consistency (which builds authenticity, trust and ultimately brand equity). This can be expressed via a list of core attributes, a brand archetype or otherwise.

Once you have nailed this personality definition you can then create a core sonic identity. Typically this is a sonic logo, something to sit alongside your visual logo, strapline and other brand assets. This is a critical step and one that you need to absolutely nail. It must communicate the brand personality from inception – and it's only possible to confirm this by thorough personality testing with consumers without any brand association.

As a wannabe 'distinctive brand asset' it must enter the world already 'on brand'. This sonic identity may go on to be the audible full stop at the end of all brand communication with the consumer, both to reinforce the brand personality but ultimately, to create a Pavlovian trigger to the brand itself.

Sonic Marketing

This is where some brands seem to lose the sonic plot.

Les Binet, Senior Strategist and Planner at adam&eveDDB, observed:

Effectiveness of a commercial can be raised by 20-30% in advertising if the impact of audio is understood and used strategically, but very rarely is research carried out to explore and confirm that the audio is effective.

Over time brands roll through multiple agencies, all with their own interpretation of the client's brand - some brands even outsource their entire brand strategy and implementation to the agency. However, because music is so subjective and historically has rarely been viewed through a strategic lens, there are no hard and fast rules around what music is right or wrong for a brand. Some focus purely on the storytelling and choose music that they believe best reinforces that with no reference to the core brand identity.

Others are starstruck by celebrity artists whose perceived personality may be at odds with the brand, others (still) rely on their kids for guidance. In the circumstances, it's easy to see how a music strategy can unravel.

Taking marketing in isolation, music should be consistent across all executions – many brands choose a consistent genre or style, and work within this to find tracks that support the storytelling. But few, if any, ensure the music is also supporting the brand personality. This is not necessarily because they don't want to, but often because when they dive down the subjective rabbit hole of choice, it is all but impossible to objectively identify music that is genuinely both on-campaign and on-brand.

Part of the problem is that music catalogue search interfaces are not fit for purpose in a brand centric world. They don't do personality or archetypes. They do instruments, beats per minute, genres and 'moods' – and moods are not personalities.

Any personality can exhibit any mood it likes. Fortunately, that problem is now solved, but more of that later.

On the plus side, many brands we work with are now actively exploring how to keep their marketing music 'brandmatched', others reach for the comfort blanket of past usage to inform future strategy. And that's simply not going to work.

As **Marth Rogers** said:

When your headlights aren't on, the best rear-view mirror available isn't likely to improve your driving.

It may be that past usage has always been far removed from brand personality resonance, so it seems a strange approach to take - and risks resulting in a consistently wrong music strategy rather than a consistently right one.

We are increasingly building dedicated libraries of music through our OnBrand SaaS platform that represent pre-approved music for a particular brand. These are music libraries, typically 100 – 200 tracks strong, selected from tens of thousands of tracks, that are all tightly on brand. These libraries are used both internally but also to brief agencies and creatives on the 'sound of the brand' and are often also pre-approved for marketing execution.

Other brands have brand specific catalogues curated by sonic branding agencies. Shell and Mastercard are two examples of brands that have created original music libraries of long form tracks that 'watermark' the sonic logo melody in every track. This will become more common and, while not yet endemic, it does go some way to ensuring the brand voice is always 'in harmony' with the core brand personality.

All music in marketing should, at the very least, have a backbone of brand personality on which you can then add/overlay additional attributes that resonate with the marketing goals/campaign. But it must be on brand.

To be clear, insisting that the music is on brand does not have to be restrictive. The creative agency mentioned above put forward 18 potential tracks for the campaign in question and 6, or over 30% of them, were 70% or more on brand. They still got to choose, but from a smaller pool and with the confidence that the final choice would be both campaign appropriate AND on brand.

But enough talk of marketing. It's clear what needs to be done – use music that supports the campaign but is also on brand.

But if you don't have a million-dollar budget to compose and test your own, how do you find and evaluate licensable music that does both?

Finding music that is both on brand and campaign appropriate

You know what you need to do, but how do you execute on your music strategy through an objective lens? There is a fundamental mismatch between the language of brands and the language of music - as the much-quoted saying goes: 'writing about music is like dancing about architecture'.

What is needed is a music search technology that speaks the language of brands. By that I mean archetypes, personalities and attributes rather than genres, beats per minute and moods.

The ability to objectively find 'magician or caregiver music' or music that nails six pillar brand attributes, plus a handful of desired campaign attributes, in any given genre, is the way forward for music search for brands. This removes the subjective mystique that gets in the way of sound commercial decisions in music, and provides objective emotional benchmarks for brands and creatives alike.

Our OnBrand platform does just that and is now being used by brands and agencies worldwide. If you are interested in a trial please do get in touch.

APPENDIX

Overall sonic brand rankings

Overall attribution	2023 Rank	Change 2021 - 2023	Attribution overall	Attribution Gen Z	Attribution >25s	Name in logo
Hot Pockets	1	6	95%	92%	99%	Yes
Nationwide (vocal)	2	8	94%	90%	97%	Yes
Liberty Mutual	3	11	94%	90%	97%	Yes
Arby's	4	-2	92%	90%	93%	Yes
Red Robin	5	6	91%	88%	95%	Yes
O'Reilly	6	3	90%	88%	92%	Yes
Goldfish	7	-6	89%	89%	88%	Yes
Key	8	8	89%	85%	93%	Yes
AutoZone	9	-5	87%	84%	91%	Yes
Klondike	10	3	82%	78%	86%	Yes
Farmers	11	-5	82%	79%	87%	Yes
Netflix	12	-7	81%	93%	72%	No
Chili's	13	5	81%	77%	85%	Yes
PlayStation	14	13	80%	78%	82%	Yes
Ace Hardware	15	-3	80%	79%	82%	Yes
Folgers	16	12	79%	69%	93%	Yes
Pandora	17	-14	78%	75%	80%	Yes
Little Caesar's	18	-10	78%	73%	81%	No
Febreze	19	2	77%	73%	83%	Yes
The General	20	0	77%	70%	83%	Yes
Nationwide (piano)	21	NEW	75%	72%	78%	No
State Farm	22	0	75%	76%	74%	No
Taco Bell	23	11	73%	78%	69%	No
Green Giant	24	-9	73%	61%	86%	Yes
USAA	25	1	72%	65%	79%	Yes
Tums	26	-3	69%	60%	76%	Yes
McDonald's	27	-10	68%	77%	61%	No

Overall attribution	2023 Rank	Change 2021 - 2023	Attribution overall	Attribution Gen Z	Attribution >25s	Name in logo
Ricola	28	13	67%	45%	86%	Yes
T-Mobile	29	2	63%	68%	59%	No
Old Spice	30	8	62%	54%	69%	No
Daisy	31	-1	60%	51%	70%	Yes
Pepsi	32	-13	60%	50%	65%	Yes
Activia	33	-9	60%	44%	77%	Yes
Xbox One	34	3	56%	65%	48%	No
Intel - original	35	-10	53%	50%	58%	No
Menards	36	0	53%	49%	57%	Yes
MGM	37	-4	52%	45%	57%	No
Home Depot	38	2	49%	61%	37%	No
Avocados From Mexico	39	-7	46%	44%	48%	Yes
Haribo	40	-11	45%	49%	42%	Yes
Chuck E. Cheese	41	-6	44%	45%	44%	No
Allianz Global Investors	42	NEW	43%	33%	50%	Yes
AT&T	43	1	38%	31%	47%	No
Duracell	44	-2	38%	34%	43%	No
HBO	45	-2	34%	33%	35%	No
TikTok	46	NEW	34%	47%	22%	No
Intel (2023)	47	NEW	32%	20%	41%	No
ESPN	48	3	30%	26%	36%	No
Disney+	49	20	29%	37%	19%	No
Coca Cola	50	-11	29%	30%	27%	No
Flash	51	3	28%	18%	36%	Yes
Chicken Tonight	52	-5	26%	25%	27%	Yes
Amazon Prime Originals	53	-4	25%	32%	18%	No
NBC	54	-8	24%	16%	31%	No
CBS Entertainment	55	2	24%	19%	29%	No
YouTube Originals	56	-4	21%	36%	13%	No
Honda	57	-12	21%	25%	16%	No
LG	58	-10	21%	18%	24%	No

Overall attribution	2023 Rank	Change 2021 - 2023	Attribution overall	Attribution Gen Z	Attribution >25s	Name in logo
Hulu Original	59	-9	20%	15%	25%	No
Paramount+	60	-1	19%	25%	14%	No
Tuneln	61	11	19%	14%	22%	Yes
Oreo	62	15	18%	21%	16%	No
Huggies	63	2	17%	20%	15%	No
YouTube	64	NEW	17%	18%	16%	No
UEFA Champions League	65	NEW	17%	14%	20%	Yes
Lays	66	NEW	17%	9%	23%	No
American Express	67	32	17%	12%	22%	No
Panera Bread	68	NEW	17%	16%	18%	No
Aldi	69	35	17%	20%	14%	No
Colgate	70	10	17%	23%	13%	No
Xiaomi	71	-16	17%	14%	19%	Yes
Superbet	72	NEW	16%	11%	20%	No
Sony	73	-20	16%	15%	17%	No
Nintendo Switch	74	-1	16%	21%	12%	No
WETA	75	NEW	16%	14%	17%	No
Nissan	76	-9	16%	22%	11%	No
Vuse	77	NEW	15%	13%	18%	Yes
Clorox	78	20	15%	16%	15%	No
Singapore Airlines	79	-36	15%	14%	16%	No
Kraft Mac & Cheese	80	NEW	15%	11%	18%	No
Finastra	81	2	15%	17%	13%	No
USA Today	82	4	15%	13%	16%	No
Deloitte	83	-25	15%	17%	13%	No
Mastercard	84	12	14%	17%	12%	No
TCL	85	16	14%	21%	8%	No
Ethiad	86	22	14%	21%	11%	No
Visa	87	13	14%	18%	9%	No
Cooper Tyres	88	7	14%	19%	10%	Yes
Hayu	89	NEW	14%	17%	11%	No

Overall attribution	2023 Rank	Change 2021 - 2023	Attribution overall	Attribution Gen Z	Attribution >25s	Name in logo
ESL	90	NEW	14%	9%	17%	No
Philips	91	-29	14%	13%	15%	No
Florida24	92	-4	13%	14%	13%	No
Sprint	93	-22	13%	15%	11%	No
USBank	94	-13	13%	15%	12%	No
TD Ameritrade	95	-31	13%	17%	9%	No
Voices	96	NEW	13%	15%	11%	Yes
Chevron	97	-19	13%	15%	10%	No
PBS	98	-24	13%	14%	11%	No
Showtime	99	-36	13%	16%	9%	No
Sonos	100	-25	12%	15%	10%	No
Tostitos	101	NEW	12%	15%	10%	No
Cadence Bank	102	NEW	12%	14%	11%	No
Travelers	103	-6	12%	15%	11%	No
Audible	104	-1	12%	16%	9%	No
Emerson	105	NEW	12%	11%	12%	No
AccuWeather	106	NEW	12%	7%	16%	No
Leapfrog	107	-22	11%	16%	8%	No
Legal & General	108	NEW	11%	8%	15%	No
Shell	109	-53	11%	13%	10%	No
BMW	110	-8	11%	14%	8%	No
Acast	111	-51	11%	9%	13%	No
Michelin	112	-51	11%	14%	8%	No
Peacock	113	-45	11%	10%	12%	No
Imodium	114	-48	11%	15%	8%	No
HSBC	115	-31	11%	12%	9%	No
Samsung	116	-10	11%	13%	9%	No
Campbell's Soup	117	-23	10%	9%	13%	No
Dove Men+Care	118	NEW	10%	12%	9%	No
Volkswagen	119	-37	10%	6%	14%	No
Gillette	120	-27	10%	12%	8%	No

Overall attribution	2023 Rank	Change 2021 - 2023	Attribution overall	Attribution Gen Z	Attribution >25s	Name in logo
Audi	121	-34	9%	12%	6%	No
Southwest Airlines	122	-52	9%	11%	8%	No
Ford	123	-31	9%	12%	6%	No
Gymshark	124	NEW	9%	8%	10%	No
Wells Fargo	125	-18	9%	8%	9%	No
Pepsodent/Signal	126	-21	9%	8%	9%	No
Zurich Insurance	127	NEW	8%	7%	9%	No
Hyundai	128	-52	8%	7%	8%	No
Bloomberg	129	-20	8%	6%	9%	No
Cadbury	130	NEW	8%	7%	8%	No
Nvidia GeForce	131	-40	8%	10%	6%	No
Porsche	132	-43	7%	7%	8%	No
Apple TV+	133	-54	7%	5%	9%	No
AXA	134	-44	5%	7%	2%	No
Pilsner Urquell	135	NEW	5%	4%	6%	No

The fastest growing sonic brands 2021 -2023

Brand	2023 Rank	Increased attribution 2021 - 2023	Gen Z	>25s	Name in logo
Nationwide (piano)	1	75%	72%	78%	No
Allianz Global Investors	2	43%	33%	50%	Yes
TikTok	3	34%	47%	22%	No
Intel (2023)	4	32%	20%	41%	No
Ricola	5	26%	10%	29%	Yes
Taco Bell	6	24%	24%	38%	No
Folgers	7	24%	18%	28%	Yes
PlayStation	8	24%	21%	29%	Yes
Liberty Mutual	9	23%	17%	33%	Yes
Nationwide (vocal)	10	22%	15%	33%	Yes
Red Robin	11	20%	15%	27%	Yes
Kay	12	20%	15%	28%	Yes
Hot Pockets	13	19%	11%	36%	Yes
O'Reilly	14	18%	13%	27%	Yes
Old Spice	15	18%	8%	29%	No
YouTube	16	17%	18%	16%	No
UEFA Champions League	17	17%	14%	20%	Yes
Lays	18	17%	9%	23%	No
Panera Bread	19	17%	16%	18%	No
Chili's	20	17%	15%	12%	Yes
Superbet	21	16%	11%	20%	No
WETA	22	16%	14%	17%	No
Febreze	23	15%	7%	31%	Yes
Vuse	24	15%	13%	18%	Yes
Singapore Airlines	25	15%	14%	16%	No
Kraft Mac & Cheese	26	15%	11%	18%	No
The General	27	14%	7%	22%	Yes
State Farm	28	14%	12%	23%	No
USAA	29	14%	5%	25%	Yes

Brand	2023 Rank	Increased attribution 2021 - 2023	Gen Z	>25s	Name in logo
Hayu	30	14%	17%	11%	No
ESL	31	14%	9%	17%	No
T-Mobile	32	13%	16%	16%	No
Voices	33	13%	15%	11%	Yes
Tostitos	34	12%	15%	10%	No
Cadence Bank	35	12%	14%	11%	No
Klondike	36	12%	12%	3%	Yes
Emerson	37	12%	11%	12%	No
AccuWeather	38	12%	7%	16%	No
Legal & General	39	11%	8%	15%	No
Dove Men+Care	40	10%	12%	9%	No
Tums	41	10%	2%	10%	Yes
Ace Hardware	42	9%	8%	11%	Yes
Daisy	43	9%	0%	20%	Yes
Gymshark	44	9%	8%	10%	No
Xbox One	45	9%	12%	19%	No
Arby's	46	8%	5%	14%	Yes
Zurich Insurance	47	8%	7%	9%	No
Disney+	48	8%	11%	8%	No
Cadbury	49	8%	7%	8%	No
Home Depot	50	6%	14%	7%	No
AutoZone	51	6%	3%	11%	Yes
Menards	52	6%	0%	14%	Yes
Pilsner Urquell	53	5%	4%	6%	No
AT&T	54	5%	-4%	18%	No
Farmers	55	4%	0%	10%	Yes
Goldfish	56	4%	0%	13%	Yes
MGM	57	4%	-3%	6%	No
Ethiad	58	3%	5%	4%	No
Green Giant	59	3%	-5%	7%	Yes
Netflix	60	3%	7%	12%	No

Brand	2023 Rank	Increased attribution 2021 - 2023	Gen Z	>25s	Name in logo
Little Caesar's	61	2%	-2%	3%	No
ESPN	62	2%	-3%	9%	No
Aldi	63	2%	7%	-2%	No
McDonald's	64	1%	11%	-8%	No
Flash	65	1%	-9%	12%	Yes
Activia	66	0%	-15%	18%	Yes
American Express	67	0%	-1%	-6%	No
Duracell	68	-1%	-6%	7%	No
CBS Entertainment	69	-1%	-5%	3%	No
Clorox	70	-1%	-5%	1%	No
TCL	71	-2%	3%	1%	No
Oreo	72	-2%	1%	-3%	No
Tuneln	73	-2%	-13%	20%	Yes
Visa	74	-3%	1%	-6%	No
Mastercard	75	-3%	1%	-9%	No
Colgate	76	-3%	3%	-7%	No
Pandora	77	-3%	-5%	-3%	Yes
Samsung	78	-3%	-5%	0%	No
Cooper Tyres	79	-3%	-1%	1%	Yes
Amazon Prime Originals	80	-3%	2%	-8%	No
Bloomberg	81	-4%	-4%	-4%	No
Chuck E. Cheese	82	-4%	-9%	12%	No
Wells Fargo	83	-4%	-8%	0%	No
Audible	84	-4%	-4%	7%	No
Avocados From Mexico	85	-4%	-3%	-8%	Yes
USA Today	86	-4%	-8%	5%	No
Pepsi	87	-4%	-12%	-4%	Yes
Paramount+	88	-4%	-1%	-1%	No
Finastra	89	-4%	-4%	0%	No
BMW	90	-4%	-3%	-6%	No
HBO	91	-5%	-3%	-10%	No

Brand	2023 Rank	Increased attribution 2021 - 2023	Gen Z	>25s	Name in logo
Huggies	92	-5%	-3%	-3%	No
Nintendo Switch	93	-5%	-3%	1%	No
Florida24	94	-5%	-10%	1%	No
Chicken Tonight	95	-5%	-6%	-5%	Yes
Travelers	96	-5%	-6%	4%	No
Intel - original	97	-6%	-11%	3%	No
Nissan	98	-6%	-2%	-5%	No
YouTube Originals	99	-6%	4%	-5%	No
Pepsodent/Signal	100	-6%	-9%	0%	No
USBank	101	-6%	-5%	-8%	No
Chevron	102	-7%	-5%	-9%	No
Campbell's Soup	103	-7%	-9%	-4%	No
Leapfrog	104	-7%	-4%	-7%	No
Sonos	105	-8%	-8%	-2%	No
PBS	106	-8%	-9%	-2%	No
Sprint	107	-8%	-8%	-3%	No
Gillette	108	-8%	-6%	-9%	No
HSBC	109	-8%	-6%	-11%	No
Ford	110	-9%	-8%	-6%	No
Philips	111	-9%	-11%	-5%	No
NBC	112	-9%	-21%	9%	No
Deloitte	113	-9%	-10%	0%	No
Audi	114	-9%	-8%	-6%	No
Hulu Original	115	-9%	-12%	-9%	No
TD Ameritrade	116	-9%	-9%	-3%	No
Volkswagen	117	-9%	-18%	8%	No
Xiaomi	118	-10%	-16%	4%	Yes
Showtime	119	-10%	-9%	-5%	No
LG	120	-10%	-16%	1%	No
Haribo	121	-10%	-11%	-7%	Yes
Peacock	122	-10%	-15%	-1%	No

Brand	2023 Rank	Increased attribution 2021 - 2023	Gen Z	>25s	Name in logo
Nvidia GeForce	123	-10%	-9%	-9%	No
Sony	124	-11%	-13%	-6%	No
Porsche	125	-11%	-12%	-8%	No
Imodium	126	-11%	-10%	-5%	No
Michelin	127	-11%	-9%	-11%	No
Acast	128	-12%	-21%	-2%	No
Southwest Airlines	129	-12%	-12%	-9%	No
Hyundai	130	-12%	-12%	-13%	No
Honda	131	-12%	-12%	-9%	No
Apple TV+	132	-13%	-18%	0%	No
AXA	133	-13%	-11%	-14%	No
Shell	134	-14%	-15%	-10%	No
Coca Cola	135	-15%	-14%	-15%	No

Joined up sonic strategy rankings: Sonic logo and music in marketing – personality match to brands

Brand	Rank	Overall personality match	Sonic logo match to brand	Advert match to brand
AXA	1	91%	89%	94%
Gymshark	2	91%	91%	90%
Nvidia GeForce	3	88%	96%	81%
Home Depot	4	85%	91%	79%
Volkswagen	5	82%	95%	70%
Hulu Original	6	80%	90%	69%
Duracell	7	80%	87%	72%
Arby's	8	78%	81%	75%
Hot Pockets	9	78%	83%	73%
AutoZone	10	78%	88%	68%
Red Robin	11	78%	81%	74%
BMW	12	77%	89%	66%
Tostitos	13	77%	83%	72%
Taco Bell	14	77%	90%	64%
Apple TV+	15	77%	91%	62%
Xiaomi	16	76%	84%	68%
Ford	17	75%	88%	62%
T-Mobile	18	75%	95%	55%
Legal & General	19	75%	81%	69%
Acast	20	74%	68%	81%
Porsche	21	74%	83%	65%
Finastra	22	74%	92%	56%
USAA	23	74%	88%	59%
McDonald's	24	73%	94%	53%
Showtime	25	73%	59%	87%
Pepsi	26	73%	87%	59%
PlayStation	27	73%	72%	73%
Ethiad	28	72%	78%	67%
Travelers	29	72%	73%	72%

Brand	Rank	Overall personality match	Sonic logo match to brand	Advert match to brand
Clorox	30	72%	68%	76%
Hyundai	31	72%	92%	53%
ESL	32	72%	70%	73%
TikTok	33	72%	70%	74%
Coca Cola	34	71%	79%	64%
Paramount+	35	71%	95%	47%
Visa	36	71%	76%	66%
O'Reilly	37	71%	79%	62%
Huggies	38	71%	97%	45%
Wells Fargo	39	70%	76%	64%
Aldi	40	70%	83%	57%
Pilsner Urquell	41	70%	78%	62%
Sony	42	70%	67%	73%
Mastercard	43	70%	92%	48%
Audible	44	69%	96%	43%
Nissan	45	69%	91%	48%
Zurich Insurance	46	69%	73%	66%
State Farm	47	69%	83%	54%
Avocados From Mexico	48	68%	91%	45%
Superbet	49	68%	55%	81%
Bloomberg	50	68%	68%	67%
Gillette	51	67%	54%	80%
Campbell's Soup	52	67%	96%	38%
Voices	53	67%	75%	58%
LG	54	67%	80%	53%
Goldfish	55	67%	96%	38%
Vuse	56	67%	63%	70%
Emerson	57	66%	72%	61%
Lays	58	66%	89%	43%
Imodium	59	65%	84%	47%
Ace Hardware	60	65%	64%	67%

Brand	Rank	Overall personality match	Sonic logo match to brand	Advert match to brand
Kraft Mac & Cheese	61	64%	97%	32%
American Express	62	64%	67%	62%
Intel - original	63	64%	76%	53%
Farmers	64	64%	61%	66%
TCL	65	63%	63%	64%
Old Spice	66	63%	71%	56%
AT&T	67	63%	72%	54%
Klondike	68	63%	89%	37%
Honda	69	63%	63%	62%
Chuck E. Cheese	70	62%	67%	57%
Peacock	71	61%	88%	35%
TD Ameritrade	72	61%	61%	61%
Samsung	73	61%	64%	58%
Leapfrog	74	61%	95%	26%
Allianz Global Investors	75	60%	76%	44%
HSBC	76	60%	53%	67%
Liberty Mutual	77	60%	52%	67%
NBC	78	58%	46%	70%
Oreo	79	58%	89%	26%
Deloitte	80	58%	63%	52%
Dove Men+Care	81	57%	43%	71%
Cadbury	82	57%	94%	20%
Southwest Airlines	83	57%	68%	46%
Philips	84	57%	73%	40%
Folgers	85	56%	89%	23%
Sonos	86	56%	65%	48%
USBank	87	55%	58%	53%
Colgate	88	55%	85%	25%
Activia	89	54%	85%	23%
Pandora	90	54%	62%	45%
Tums	91	52%	65%	39%

Brand	Rank	Overall personality match	Sonic logo match to brand	Advert match to brand
Ricola	92	52%	67%	36%
Panera Bread	93	49%	50%	47%
Nintendo Switch	94	48%	46%	50%
Febreze	95	48%	88%	8%
Disney+	96	41%	65%	16%
Cadence Bank	97	39%	42%	35%
Kay	98	37%	45%	30%
Nationwide (piano)	99	37%	49%	25%
Nationwide (vocal)	100	36%	47%	25%

ABOUT THE ONBRAND SAAS PLATFORM

OnBrand – AI matching of brands to music



OnBrand is an entirely new approach to music search that revolutionises the process of selecting music for marketing campaigns.

It enables data-informed music choices and provides robust cost/benefit analysis for any commercial music investment. OnBrand is not only totally brand-centric but it speaks brand language; enabling brands to enhance campaign performance while simultaneously strengthening their emotional bonds with consumers.

By removing uncertainty from every brand campaign music decision, it ensures music choices always match brand personality and campaign goals.

The platform enables marketers to search across any number of music catalogues to identify campaign music that is both on-brand and campaign appropriate, using a combination of over 400 brand attributes, plus self-defined brand personality and brand archetypes.

In this way, OnBrand delivers greater certainty of immediate impact and sustained ROI from campaigns, by reducing subjectivity and risk from music selection.

Users can also upload tracks being considered for a particular campaign and, in less than 10 minutes, interrogate the personality of each track, view over 400 attribute ratings, the closeness of match to the brand and campaign appropriateness.

OnBrand also indexes the top 100 trending TikTok tracks against over 400 brand attributes on a weekly basis and enables brands to instantly define their brand and campaign priorities, and rank all 100 tracks in order of closeness of match.

How it Works

Powered by a unique double-stacked AI layer of algorithms trained entirely on human derived data, OnBrand first automatically tags music with up to 500 separate attributes thanks to a partnership with Cyanite, the world-leading AI music tagging company.

Then it uses a further AI layer of over 200 algorithms to map these tags to SoundOut's emotional DNA map of music, created with the input of over 500,000 consumer surveys and over 12 million datapoints. The platform delivers 95% precision compared to human indexation.