



THE 2021 SOUNDOUT INDEX

A report on the effectiveness, market penetration and personality
of the world's best known sonic logos

May 2021

The background of the slide features a series of glowing, ethereal blue lines that flow and swirl across a solid black field, creating a sense of dynamic movement and digital energy.

THE DEFINITIVE INDEX

135 Brands

30,000 Consumer Participants

1,000,000 Words of Written Reviews

10,000,000+ Data Points

Whilst most people agree that we have at least five senses, the strategic use of sound in branding has remained something of a Cinderella.

This is due, in part, to the inability to get objective data around how crafting music and sound can land the right brand feel and improve purchase intent.

Advances in neuroscience and machine learning are now being used to allow us to objectively and strategically manage sound in the brand mix. It is becoming clear that there is a huge upside in getting it right and downside of getting it wrong.

SoundOut has built world-leading data and tools to assess the impact of the sounds, music and voices that brands choose to represent their brand. This unique capability vastly improves the ROI brands will get from a strategic investment in audio branding and sonic marketing.

This report is the industry's first ever in depth analysis on how effectively sonic branding is currently being used by major organisations. It provides long overdue benchmarks and brand tracking metrics.

As brands increasingly invest in existing sonic identities and craft new ones, the ability to measure efficacy and return on investment will be essential.

Sean Gogarty
former Divisional CEO at Unilever



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Introduction

The SoundOut Index

Measuring the effectiveness,
market penetration and personality
of the world's best known
sonic logos.

Welcome to the inaugural SoundOut Index, the definitive guide to the sonic signatures/logos used by the world's largest brands.

The importance and power of sonic branding is increasingly being recognized and harnessed by forward thinking brands and many are making significant investments in launching or refreshing their sonic identities. In the next section we review over 500 sonic brands and look at the relentless growth of sonic branding over the past 20 years, a trend that is set to accelerate going forwards as the world increasingly embraces voice and music as a core brand communication medium. As a result the importance of measuring the effectiveness of this investment has never been more important.

In compiling this index we have applied state of the art, scientifically based testing methodologies, developed over many years working on strategic sonic branding and marketing projects with many of the world's leading brands and sonic branding agencies. Details of these methodologies are contained in Appendix 2. We have also collaborated with a number of agencies that have spent many years identifying and indexing all the brands in this report.

We are truly independent and not hostage to any bias or conflicting client relationships. Our long term goal is simply to expand the use of scientific validation in the use of music in branding and marketing and, while we acknowledge that the results may not please everyone, knowing you are falling short is often as valuable as confirmation that you are nailing it. Either way, the SoundOut Index ranks the top sonic brands in the US and UK, so wherever you appear in the Index you are in rarefied company when it comes to audio branding.

No algorithmic music listening black boxes were harmed in the creation of this study. All raw data has been collected directly from individual consumers hosted on our world-leading 3.5 million strong consumer panel platform, a platform that powers insights and research for many of the world's leading sonic branding agencies, record labels and radio groups.

Finally, this Index is simply that, a high level index of the results of the study. If your brand or your client is featured we are very happy to share more granular results and analysis, including all 200 individual attribute ratings, BrandMatch results and hundreds of verbatim reviews on each sonic logo submitted by consumers as part of the study. While we feature the top performers in this report there are many others that we have also tested to compile this index and if your brand has not made the cut, the chances are we do have the data. The fast food case study in the appendix will give you a flavor of what is available. If this is of interest then please do not hesitate to contact us.

While this index reports on the high level results, we will be building on this by releasing a further three in depth reports over the next three months each focusing on one of the three components that contributes to the overall success of a sonic brand – effectiveness, personality and market penetration. Each report will also contain detailed metrics on each of the brands featured later in this report.

David Courtier-Dutton
SoundOut founder and CEO



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Structure of the Index

In order to try and create a level playing field we have split the results into 3 key sections.

1. Effectiveness (Quality of logo)

This is probably the most important metric as it focuses on the intrinsic qualities of the logo itself, namely, appeal (how likable is it), recall (how easy is it to remember), and using implicit testing, how much does it increase a consumer's propensity to buy. These results are powered solely by the responses from consumers who had no explicit familiarity with each logo.

2. Market penetration (Investment in logo/successful market execution)

This is really a reflection of the exposure and investment that a logo has received since launch, this measures how familiar the logo is by combining results for Recognition and Attribution. A high market penetration result could be as a result of a high marketing budget, many years in market or a highly effective logo, or most likely a combination of all three.

3. Personality (Fit to brand)

This is a reflection of the strength of personality each logo is actually communicating across all consumers, and we also reveal the primary and secondary Jungian archetype each logo represents. If these results are closely aligned with your archetypal positioning, congratulations! If not then it may be time to go back to the keyboard.

For a brand to have a successful sonic strategy and execution it needs to nail all 3 of the above.



Bear in mind that success in just one section is not enough, for instance to succeed in Market Penetration and Effectiveness but fail on Personality is potentially disastrous - a consistent personality across all brand assets is essential to build both trust and brand equity. Conversely, to nail Effectiveness and Personality is the cornerstone of a great sonic strategy – all that is then needed is investment and exposure to ensure your sonic becomes iconic.

To enable you to precisely measure how close your logo is to your core brand personality we have also created an online tool, powered by our world leading [BrandMatch technology](#), that enables you to easily benchmark your own brand personality and reveal the closeness of match to your sonic logo. Simply contact us for a login and access to this.



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Some Key Findings

The core purpose of an effective sonic logo is to provide an emotional connection to the brand itself and spark consistent brand association. The first step in creating this connection is to ensure strong recall of the logo.

Eight key takeaways for audio branding professionals

- **Appeal is really important.** People must like your sonic logo, intrinsic appeal is the single most powerful mechanism to land almost any personality attribute you want your sonic logo to deliver. The correlation between the appeal of a logo and the overall strength of emotion a logo is capable of delivering is over 80%.
- **Distinctiveness appears to have minimal impact on driving recall.** Accepted wisdom in marketing is that having a unique or 'distinctive' brand asset is critical to better deliver this brand association. Surprisingly, there is actually a mildly negative correlation between recall and distinctiveness across the 100+ US sonic logos analyzed. Of the 212 brand attributes we tested each logo against, 'Distinctive' ranks at 184 in terms of its ability to drive recall. Others to avoid are 'defiant', 'combative', 'confused', 'scientific' and 'intense'. In our follow up report on Effectiveness we will explore distinctiveness in more detail to better understand the role distinctiveness actually plays in sonic branding.
- **There are 5 attributes that particularly powerful at driving recall** - 'Uncomplicated', 'Welcoming', 'Happy', 'Friendly' and 'Child-like' - for these there is over 70% positive correlation with recall.
- **Sonic logos that include the brand name are twice as effective at cementing brand association than those that do not.** A key goal of a sonic logo is to effectively trigger brand association, and of course this is significantly more effective for brands that include the brand name in the sonic logo. But now we have measured this effect: we can see an average 59% correct attribution when the name was included and 29% without. As explored further in the 'Global trends' section below, including the brand name can call for more flexible assets - but the single easiest way to supercharge attribution is also the most obvious.
- **The core personality of sonic logos tested cluster around 3 of the 12 Jungian archetypes** – in the US, almost 50% are primarily 'Companion' archetypes, 30% are 'Rebels' and 15% are 'Jesters'. Similarly secondary archetypes are also clustered around 'Innocent', 'Companion', 'Ruler' and 'Hero'. The most common combination of primary/secondary is Companion/Innocent (40% of brands), which suggests that there is an overwhelming desire for US brands to be trusted friends to consumers – no surprise there...
- **Financial brands are currently the best at creating effective logos** (ones that are appealing, have great recall and increase propensity to buy). Unfortunately they also have the lowest market penetration. Mastercard is in the top quartile for effectiveness, but the bottom quartile for attribution. So great logos, but perhaps no-one is listening...
- **The perceived appeal and efficacy of a sonic logo is hugely impacted by the association with the brand itself.** As with pop megastars and celebrities, this brand uplift effect is effectively a proxy for the power of the brand and is particularly pronounced for entertainment brands such as Nintendo and PlayStation (up to 40%). We will explore this effect in more detail in our upcoming report on Effectiveness.
- **Pavlovian conditioning is extremely powerful in sonic branding.** As consumers make the connection between a sonic logo and the parent brand, the personality of the brand can overwhelm the intrinsic personality of the sonic logo. The logo simply becomes a trigger that releases the emotional response to the brand itself. More on this in our upcoming report on Personality (featuring all the brands in this report) but for an example of this in action take a look at the case study in the appendix. In the light of this, the importance of recall and attribution cannot be understated.



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Global Trends

As part of a wider research project into the sonic branding landscape, our sonic logo database has collected over 500 sonic logos from around the world and captured information about their musical characteristics and usage. From this, we can share with you bigger-picture insights into trends in sonic branding.

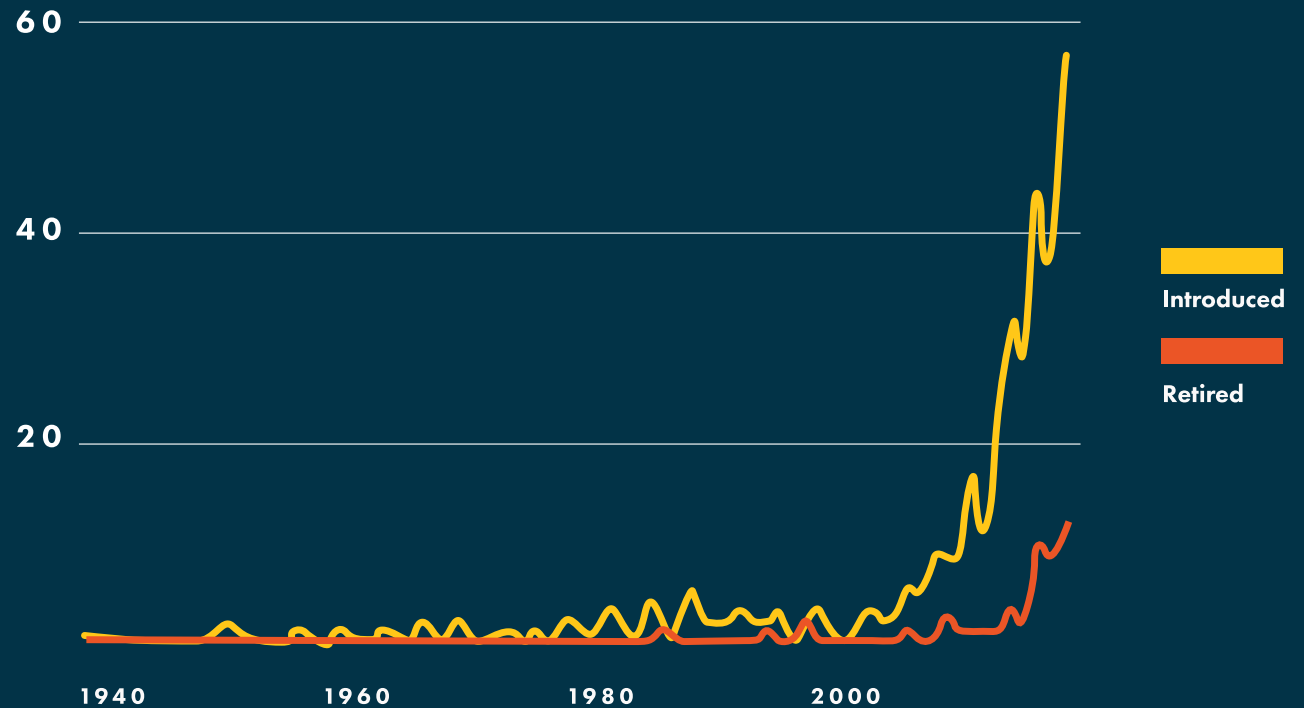
The rise and rise of audio branding

The past decade has seen exponential growth in the uptake of sonic branding, with the introduction of new sonic logos from well known brands – including the likes of HSBC, Mastercard, SONOS and the Premier League in the UK. Our data suggests that this growth is set to continue.

In tandem, we've seen a huge rise in the trademarking of these sounds, as brands presumably begin to recognise their value and look to protect their assets.

Do these new sonic logos have staying power? We'll be looking with interest at the market penetration of this new cohort of sounds over the coming months and years.

Number
of logos



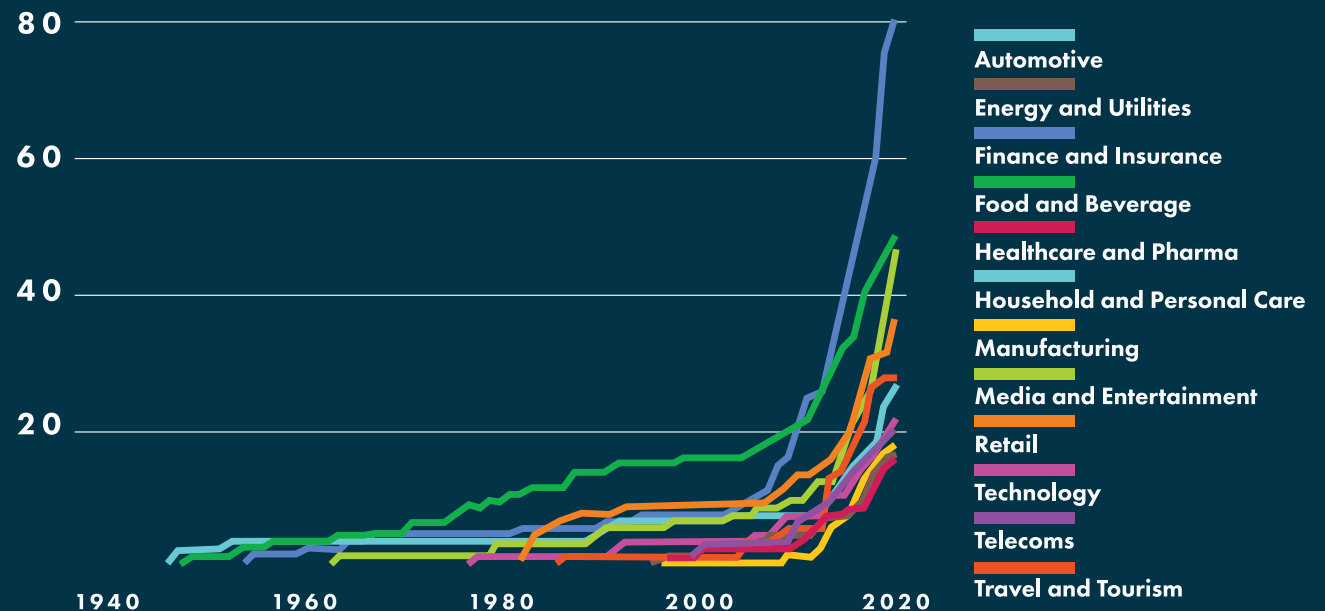
The anatomy of a sonic logo

Collecting data on this scale is allowing us to understand the typical characteristics of sonic logos across countries and industries in a way that has never been possible before. As our database expands and updates, we will drill down into these details to help brands understand the norms and highlight any opportunities for differentiation.

Growth within industries

Historically, Food and Beverage was the most prevalent industry in sonic branding, although this was overtaken in 2010 by Finance and Insurance. With sonic branding uptake growing across all industries, we may see dramatic shifts in industry dominance in a short space of time.

Number of logos

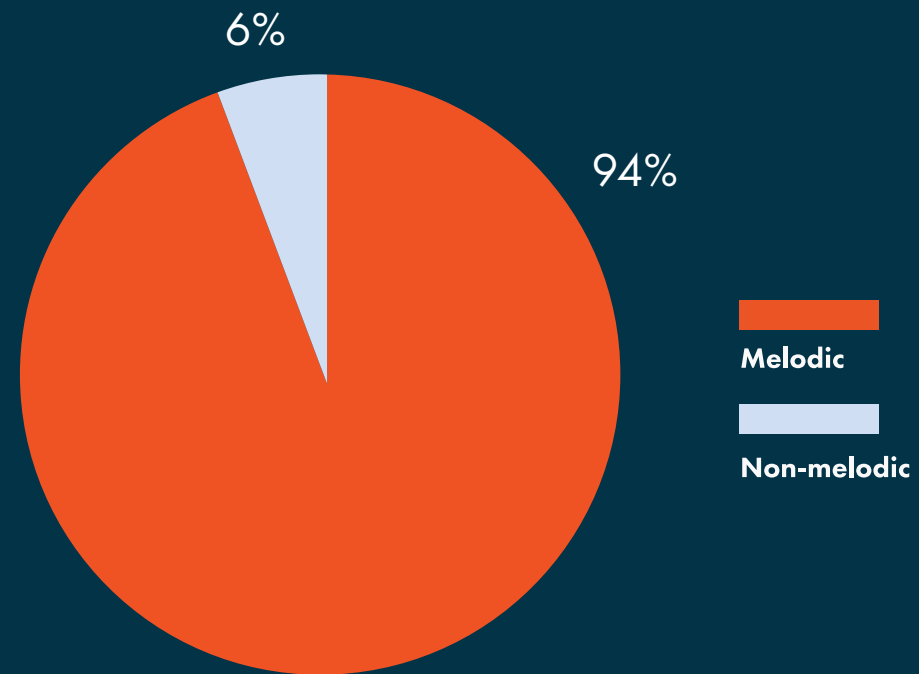


This chart highlights leading industries – our complete database includes an additional 20 industries.

The importance of melody

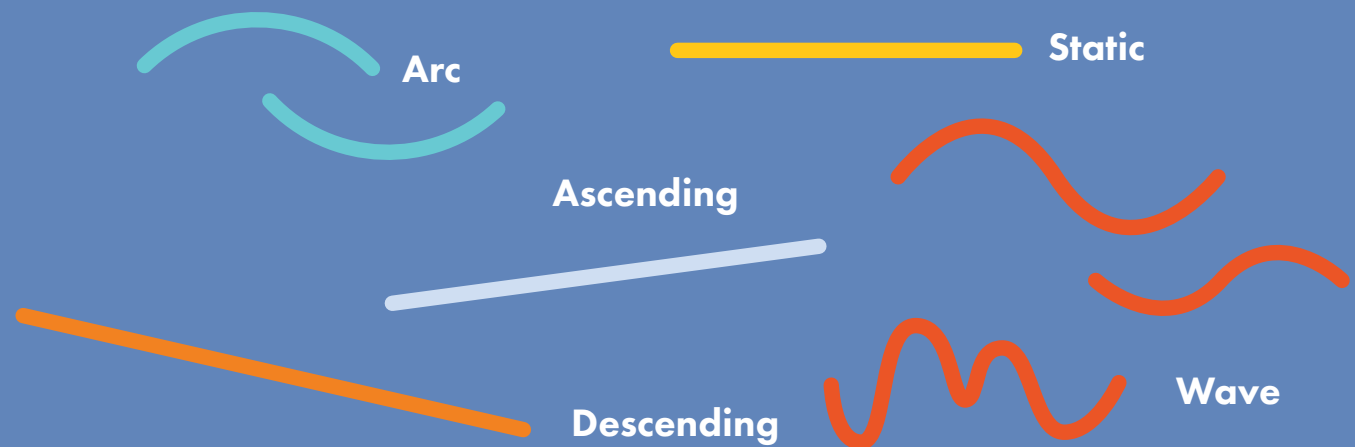
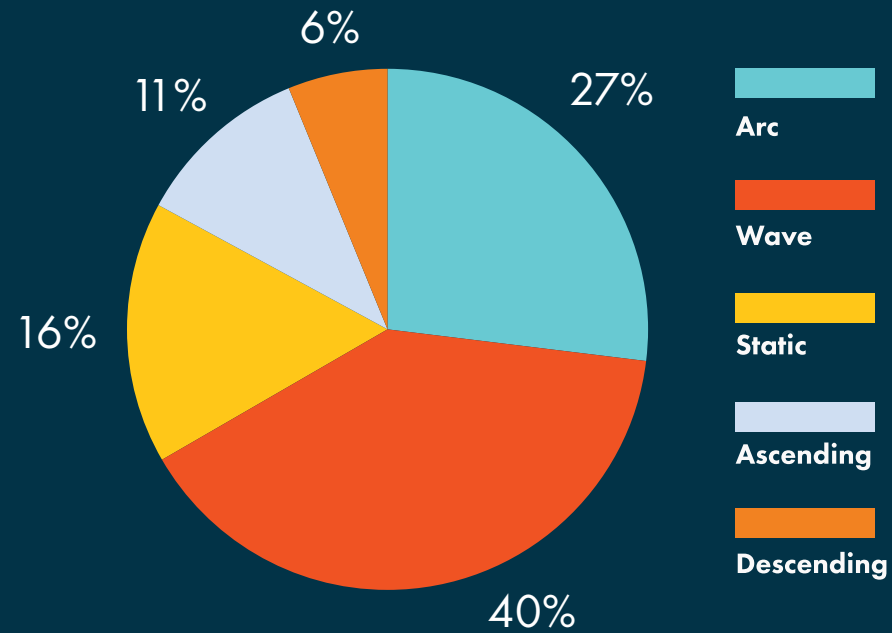
The prevalence of melodic sonic logos will come as no surprise to those familiar with audio marketing. Previous research has highlighted the importance of melody in recognition and recall.

While some brands consciously choose to use their sonic logo with utmost consistency, a melodic sonic logo gives brands the option to flex the style and emotional intent of their sound. One long-standing example of this approach comes from McDonald's, who introduced their 'I'm Lovin' It' sonic logo almost two decades ago. The melody allows the brand to alter style and instrumentation depending on the country and the campaign. As a result, the McDonald's sonic logo has been produced in almost every imaginable musical style and has been sung by a host of celebrities – from Beyonce to the Minions.



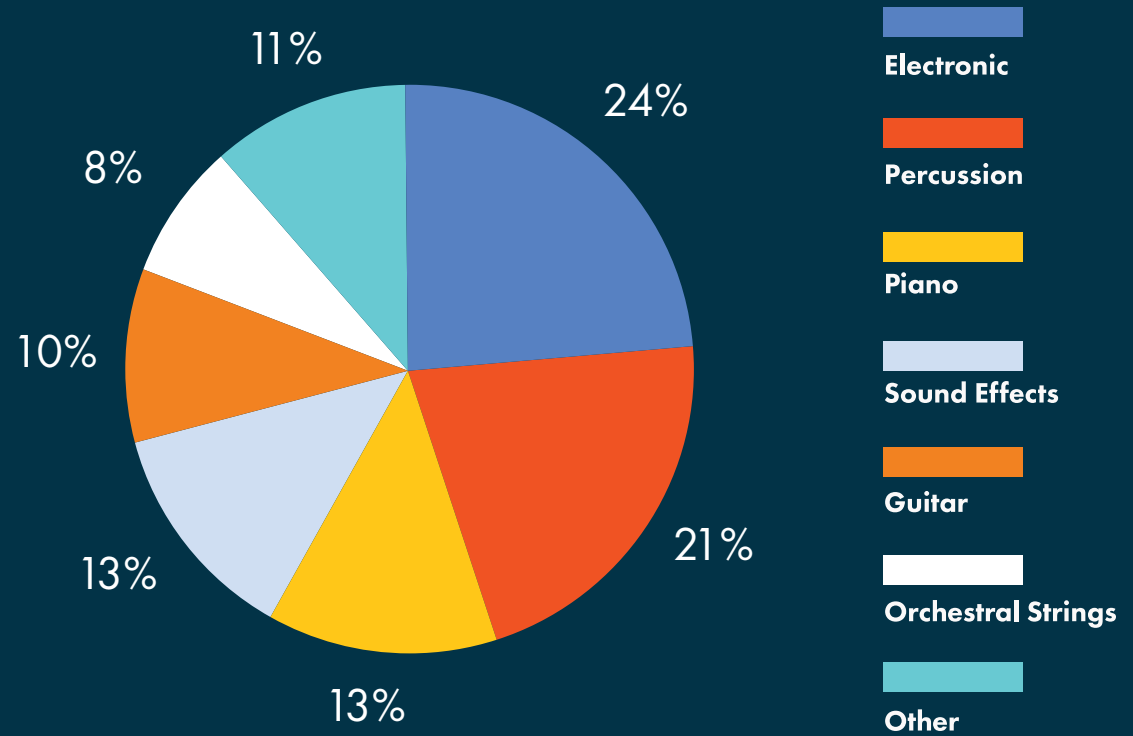
Melodic Shape

To further highlight the importance of melody, our data shows that more complex melodic shapes (waves and arcs) are most common. It is probably safe to assume that more complex melodies result in more singable, easily distinguishable sonic logos. Descending melodies are least common, presumably because of their less optimistic, terminal connotations.



Instruments

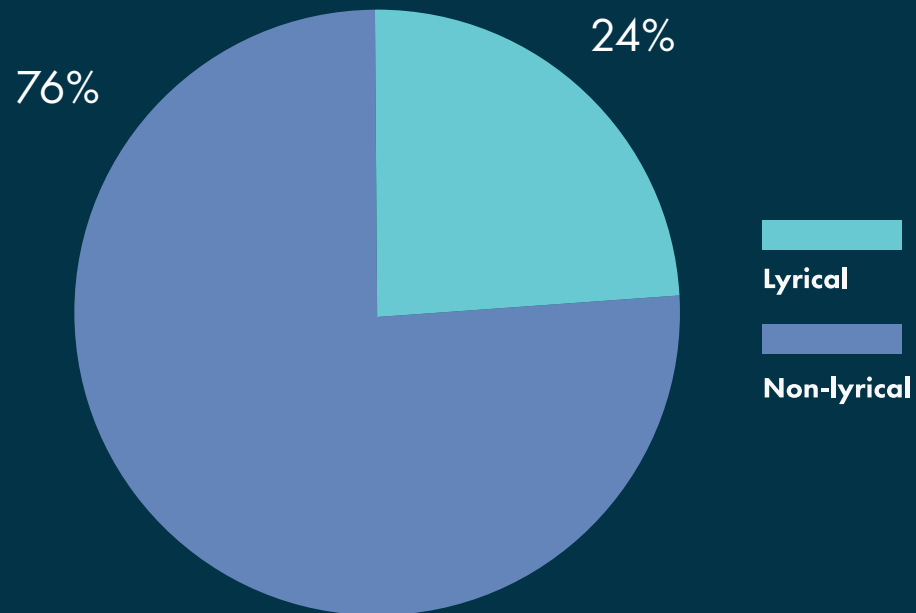
Although one sonic logo can have many variations, our data can give a sense of the type of instruments commonly used in sonic logos.



Lyrics

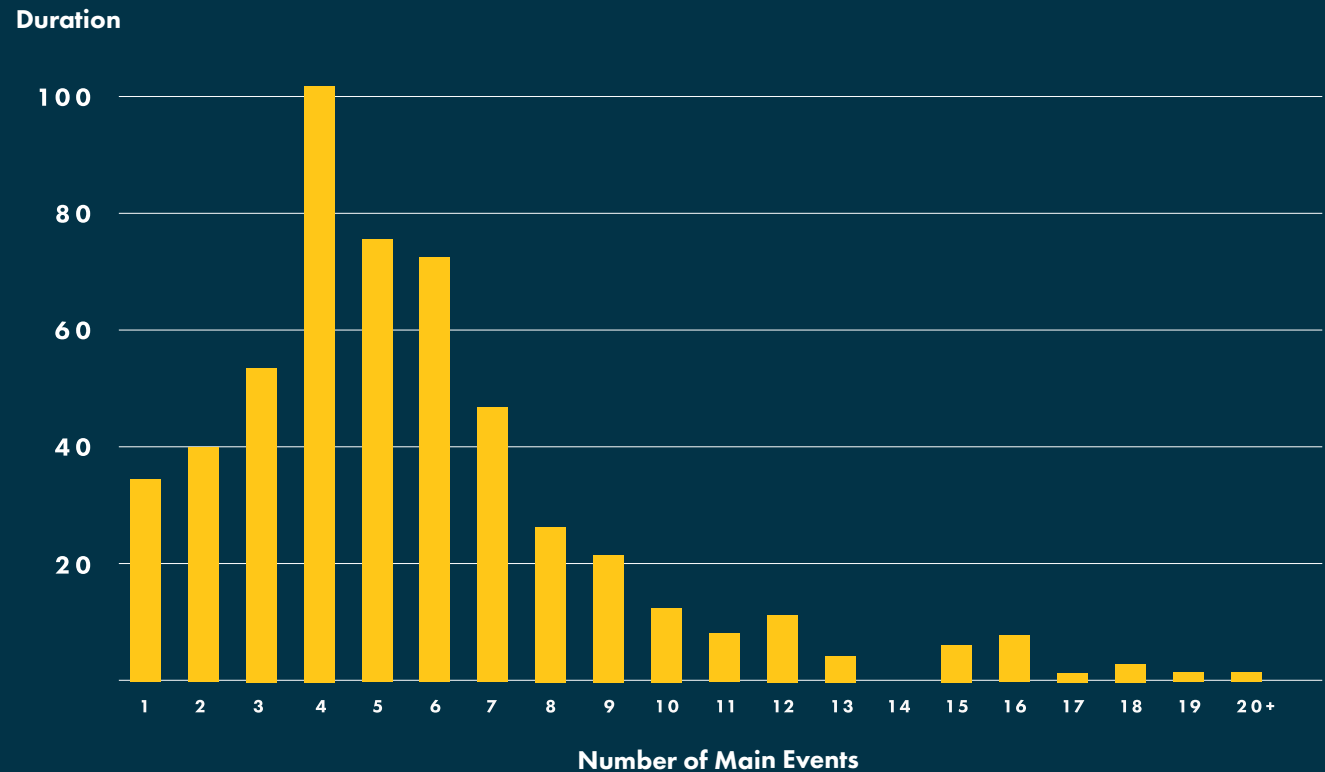
As highlighted in this report, lyrics – in particular, brand name – can boost recognition. While lyrics tend to be used around a quarter of the time overall, this varies significantly from country to country. Brands founded in Germany only use lyrics in 11% of their sonic logos, while for the United States of America that rises well above the average to 38%.

Lyrical sonic logos seem to be somewhat of their time: There's a significant difference between the date of creation of lyrical and non-lyrical sounds. Typically, newer sonic logos don't have lyrics. As a result, we tend to hear brands with older, lyrical sonic logos adapting to this trend by creating versions with and without the words.



Duration

Four note sonic logos (or sonic logos with four main events) are most common overall, this is by no means a limitation for brands. Many successful logos push into double-digits – think Farmers or Liberty Mutual. These days, we're also hearing more and more brands produce long and short versions of their sonic logos for extra flexibility.



Conclusion

- As we begin to understand the evolving nature of the industry, our database has highlighted two major themes: the fast growth in sonic branding and the desire for many brands to have flexibility in their sonic assets.
- And as our database grows and updates, we will be able to answer some important questions. Have new assets got staying power? How do melody types impact performance? And where are there opportunities for differentiation for brands entering the marketplace? Watch this space... .



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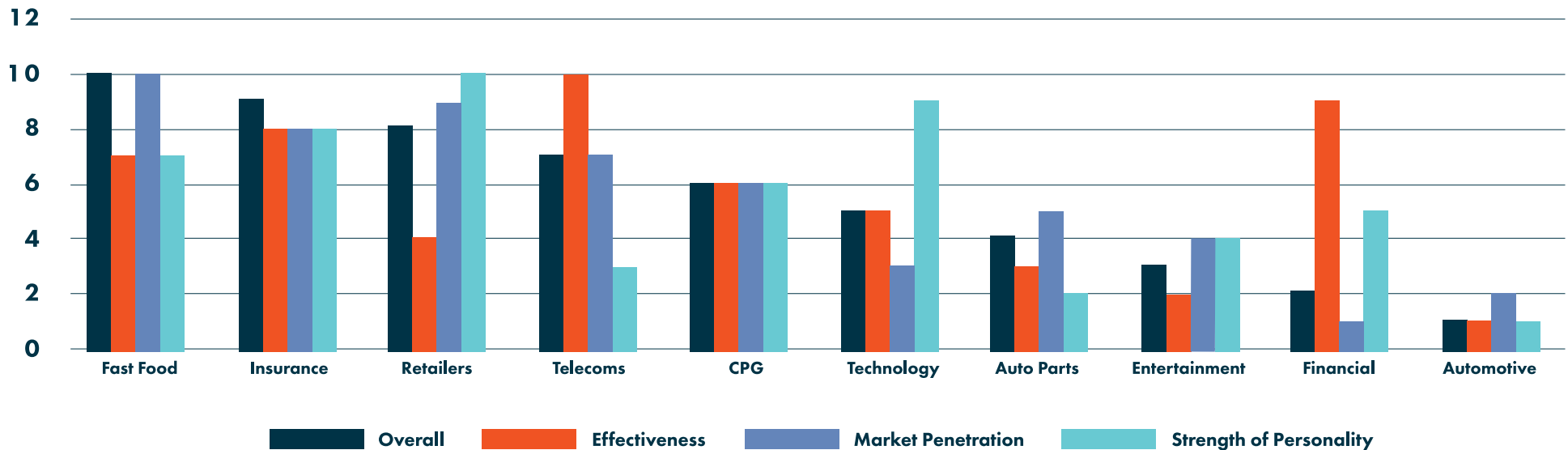
Industry Trends and Further Segmentation

Industry Ranking (US)

When we group the brands by industry in the US there are some fascinating insights...

- Retailers are nailing it on Market Penetration and Personality but falling short on the intrinsic Effectiveness of their logos.
- Conversely the financial sector has the most effective logos of all but struggle to achieve market penetration.
- Insurance companies are strong performers across the board, ranking 2nd overall on all measures.
- Automotive companies appear to be failing across the board on all measures and while Market Penetration can be excused, the poor result in Effectiveness and Personality indicates there is a lot of work to be done on audio branding in this sector.

Relative Performance by Industry



Ethnicity

We looked at whether the appeal of sonic logos varied by ethnicity and whether there was a divergence across the entire sample, and the short answer is no. The average appeal of all the US logos tested was 71% for White/Caucasians and 71% for everyone else – this was a nationally representative sample size of 20,000 people. Furthermore, the correlation between the ratings for each individual brand was over 95% between the two segments suggesting that this applies across all industries tested.

This has important ramifications for brands that seek to target a particular ethnic group. The short answer is don't bother trying to craft a sonic logo to specifically target African Americans or Hispanics, what works for one should work for all. Music is universal.

Gender

So does gender play a part in the appeal of sonic logos? A qualified no, average appeal for males was 72% and females 71%. However the correlation between each rating was 89%, still strong but an indication that some logos do work better with females than males, and vice versa.

Age

Here we did find more discrepancies, while the average rating across the 100 brands in the index was 71% for both under 25's and over 25's, the correlation was weaker at 83%. The older group preferred the logos of brands such as American Express, Green Giant, Mastercard, Huggies and NBC (up to 10% higher than the younger generation). Conversely the logos of brands such as Arby's, Home Depot, Coca Cola and Netflix were materially preferred by the under 25's.

There is significant additional analysis to be done on segmentation analysis and how this maps to industry and target demographics. This is beyond the scope of this report but we will report in more detail on this in a future publication.



The Brands - US

Listen to the US sonic logos [HERE](#)



The Brands - UK

Listen to the UK sonic logos [HERE](#)



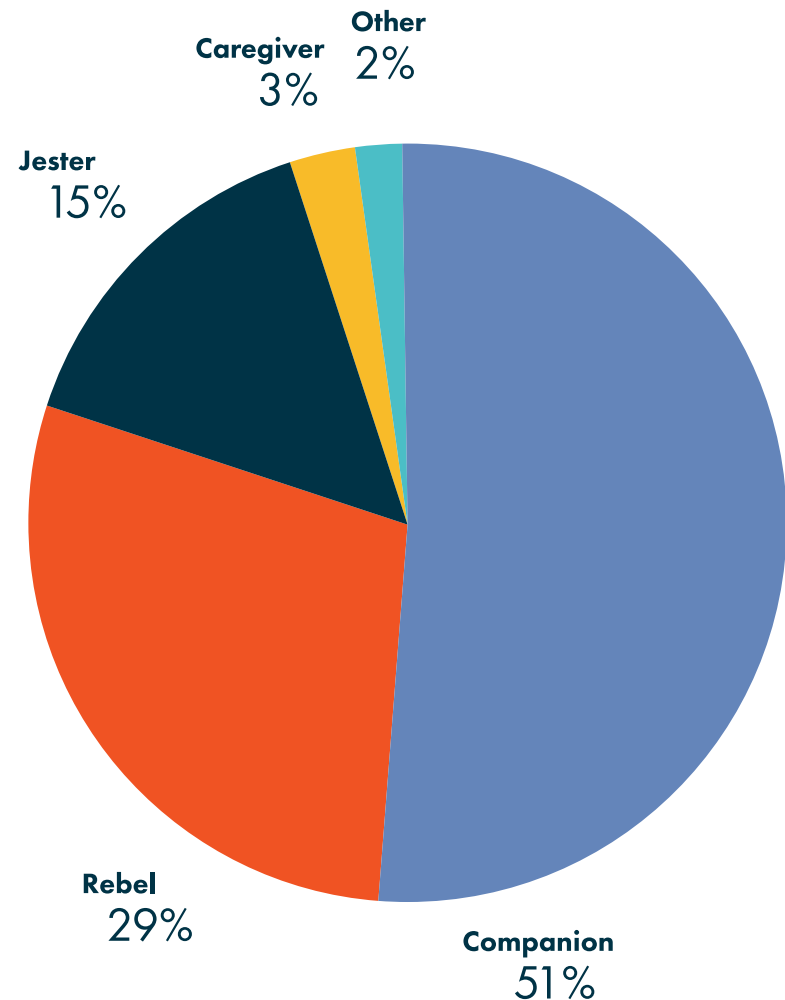


6

Overall Results

Key Findings

- Sonic logos that include the brand name are twice as effective at cementing brand association than those that do not. A key goal of a sonic logo is to effectively trigger brand association, and unsurprisingly this is significantly more effective for brands that include the brand name in the sonic logo. But now we have measured this effect. 59% correct attribution when the name was included and 29% without.
- The core personality of sonic logos cluster around 3 of the 12 Jungian archetypes. In the US, almost 50% are primarily 'Companion' archetypes, 30% are 'Rebels' and 15% are 'Jesters'. Similarly secondary archetypes are also clustered around 'Innocent', 'Companion', 'Ruler' and 'Hero'. The most common combination of primary/secondary is Companion/Innocent (40% of brands), which suggests that there is an overwhelming wish for brands to be trusted friends to consumers – no surprises there!
- Surprisingly, there is no correlation between recall and distinctiveness, indeed across the 100+ US sonic logos analyzed there was a mild negative correlation. There is also almost no correlation between distinctiveness and attribution suggesting that while distinctiveness may be a desirable attribute for brands and marketers alike, it has little or no impact on the recall of a sonic logo. This has important ramifications on the current mindset of audio marketers who prize distinctiveness above many other factors when designing and selecting sonic logos. The rationale is that if an audio logo is distinctive then it will be more easily recalled – but, taken in isolation, this is clearly not the case.
- There is however a reasonable correlation between the innate appeal of a sonic logo and a consumer's ability to recall it – i.e. if people like your logo they are more likely to remember it.



Overall Results

So here it is, the definitive SoundOut Index of the top 100 sonic logos in the US market.

As a reminder, Effectiveness looks at the intrinsic quality of the logo (excluding any brand association), Market Penetration measures how familiar consumers are with each logo and Strength of Personality reflects how strongly the 14 core BrandMatch attributes are being communicated. All numbers below are relative rankings. Of the logos we tested, we have only listed the top 100 by overall ranking.

6.1 US Top 100

Brand	Contains Brand Name	Overall	Effectiveness	Market Penetration	Strength of Personality	Primary/ Secondary Archetype
Disney (Classic)	No	1	1	4	1	Caregiver/Companion
20th Century Studios	No	2	2	2	3	Rebel/Hero
Goldfish	Yes	3	3	2	9	Jester/Companion
Warner Brothers	No	4	9	11	2	Hero/Persuader
Farmers	Yes	5	4	7	25	Jester/Rebel
Chili's	Yes	5	5	23	8	Jester/Companion

Brand	Contains Brand Name	Overall	Effectiveness	Market Penetration	Strength of Personality	Primary/Secondary Archetype
State Farm	No	7	11	19	7	Companion/Caregiver
O'Reilly	Yes	8	27	10	5	Jester/Companion
Old Spice	No	9	6	30	11	Companion/Innocent
Arby's	Yes	10	17	1	32	Rebel/Hero
Nationwide	Yes	11	15	12	24	Companion/Innocent
Red Robin	Yes	12	34	13	6	Jester/Companion
Folgers	Yes	13	27	34	4	Jester/Companion
Kay	Yes	14	30	18	18	Companion/Innocent
AutoZone	Yes	15	21	5	42	Rebel/Hero
Netflix	No	16	54	6	12	Rebel/Hero
THX	No	17	19	35	20	Rebel/Hero
Hot Pockets	Yes	18	55	7	13	Jester/Companion
Avocados from Mexico	Yes	19	10	37	29	Jester/Companion
Daisy	Yes	20	7	38	40	Jester/Companion
Intel	No	20	48	20	17	Rebel/Ruler
ACE Hardware	Yes	22	44	14	28	Companion/Jester
Febreze	Yes	23	52	24	14	Jester/Companion

Brand	Contains Brand Name	Overall	Effectiveness	Market Penetration	Strength of Personality	Primary/ Secondary Archetype
Liberty Mutual	Yes	24	55	16	21	Companion/Jester
Chicken Tonight	Yes	25	12	54	33	Jester/Rebel
Coca Cola (Taste the Feeling)	No	26	18	44	39	Companion/Innocent
Duracell	No	27	25	40	38	Rebel/Hero
Philips	No	28	13	72	23	Companion/Innocent
McDonald's (Instrumental)	No	29	46	26	37	Companion/Innocent
Paramount+	No	30	41	61	10	Caregiver/Innocent
USAA	Yes	31	34	27	52	Rebel/Hero
Tums	Yes	32	38	30	47	Rebel/Hero
LG	No	33	34	52	30	Companion/Innocent
Mastercard	No	34	14	82	22	Companion/Jester
ESPN	No	35	8	57	55	Rebel/Hero
The General	Yes	35	64	22	34	Rebel/Hero
T-Mobile	No	37	40	27	54	Companion/Innocent
CBS	No	38	24	59	44	Companion/Innocent
AT&T	No	39	30	48	50	Companion/Innocent
Finastra	No	39	21	91	16	Companion/Caregiver

Brand	Contains Brand Name	Overall	Effectiveness	Market Penetration	Strength of Personality	Primary/Secondary Archetype
Coca Cola (Instrumental)	No	41	37	58	36	Companion/Innocent
Green Giant	Yes	42	59	20	57	Jester/Companion
Menards	Yes	42	46	45	45	Jester/Companion
Sonos	No	44	33	89	15	Caregiver/Companion
Chevron	No	45	32	80	26	Companion/Caregiver
Amazon Prime Originals	No	46	69	53	19	Companion/Innocent
Imodium	No	47	16	70	58	Companion/Innocent
PBS	No	48	38	79	31	Companion/Innocent
Pandora	No	49	43	74	35	Companion/Jester
TD Ameritrade	No	50	20	77	56	Companion/Innocent
Samsung	No	50	29	97	27	Companion/Caregiver
Home Depot	No	52	67	42	46	Rebel/Hero
McDonald's (Vocal)	No	53	51	15	92	Companion/Innocent
Huggies	No	54	49	68	48	Companion/Innocent
U.S. Bank	No	55	25	75	68	Companion/Innocent
Klondike	Yes	56	83	17	69	Jester/Companion
Hulu Original	No	57	50	54	66	Companion/Rebel

Brand	Contains Brand Name	Overall	Effectiveness	Market Penetration	Strength of Personality	Primary/Secondary Archetype
Showtime	No	58	55	76	43	Ruler/Mentor
Little Caesars	No	59	72	9	97	Jester/Companion
Xbox One	No	60	81	33	65	Rebel/Ruler
Deloitte	No	60	62	66	51	Companion/Innocent
American Express	No	62	21	92	70	Companion/Innocent
Taco Bell	No	62	64	39	80	Rebel/Ruler
Activia	Yes	64	78	32	75	Companion/Jester
Apple Mac Startup	No	65	83	43	61	Companion/Innocent
Pepsi Max	Yes	65	76	25	86	Rebel/Jester
NBC	No	67	76	50	63	Companion/Innocent
Shell	No	67	60	70	59	Companion/Innocent
MGM	No	69	82	36	72	Rebel/Ruler
Flash	Yes	70	66	62	64	Jester/Rebel
YouTube Originals	No	70	92	51	49	Companion/Innocent
TCL	No	72	63	90	41	Companion/Innocent
Volkswagen	No	73	45	86	67	Rebel/Hero
Sprint	No	74	58	68	79	Companion/Innocent

Brand	Contains Brand Name	Overall	Effectiveness	Market Penetration	Strength of Personality	Primary/Secondary Archetype
HSBC	No	75	61	93	53	Companion/Innocent
Chuck E. Cheese	No	76	95	41	77	Rebel/Jester
Hyundai	No	77	69	83	62	Companion/Innocent
Sony	No	78	71	56	91	Companion/Innocent
Peacock	No	79	73	88	60	Companion/Rebel
HBO	No	80	99	49	74	Rebel/Ruler
Oreo	No	81	73	65	85	Companion/Innocent
LeapFrog	No	82	68	84	73	Companion/Innocent
Xiaomi	Yes	83	92	59	76	Rebel/Ruler
Honda	No	84	79	47	102	Companion/Innocent
PlayStation	Yes	84	100	29	99	Rebel/Ruler
Travelers	No	86	41	106	82	Companion/Innocent
USA today	No	87	94	66	71	Companion/Innocent
Michelin	No	88	79	77	83	Rebel/Ruler
Ricola	Yes	89	103	45	94	Companion/Innocent
Gillette	No	90	53	96	95	Companion/Innocent
Disney+	No	91	96	62	89	Companion/Ruler

Brand	Contains Brand Name	Overall	Effectiveness	Market Penetration	Strength of Personality	Primary/ Secondary Archetype
Nissan	No	92	100	64	93	Companion/Innocent
Pepsodent	No	93	83	100	78	Companion/Innocent
Audi	No	94	89	94	81	Rebel/Ruler
Southwest Airlines	No	95	97	73	96	Companion/Jester
Tuneln	Yes	96	91	86	90	Rebel/Ruler
Porsche	No	97	86	98	84	Rebel/Ruler
Campbell's Soup	No	98	75	99	103	Companion/Innocent
Audible	No	98	86	104	87	Companion/Innocent
BMW	No	100	86	107	88	Rebel/Hero

6.2 UK Top 36

Here are the best performing sonic logos in the UK market:

Brand	Contains Brand Name	Overall	Effectiveness	Market Penetration	Strength of Personality	Primary/Secondary Archetype
Just Eat	Yes	1	1	3	4	Jester/Explorer
AO	Yes	2	4	10	2	Jester/Rebel
GoCompare	Yes	2	11	4	1	Jester/Explorer
Moonpig	Yes	4	7	5	10	Companion/Jester
Pearl & Dean	No	5	2	19	3	Rebel/Jester
We Buy Any Car	No	6	9	15	7	Companion/Jester
Autoglass	Yes	7	14	7	15	Companion/Jester
Haribo	Yes	8	32	1	5	Jester/Companion
Renault	No	8	10	22	6	Ruler/Rebel
Guide Dogs	Yes	10	5	21	20	Companion/Jester
TrustATrader	Yes	10	24	11	11	Jester/Companion
Lloyds	Yes	12	21	1	25	Caregiver/Companion
Santander	No	13	5	30	14	Companion/Innocent

Brand	Contains Brand Name	Overall	Effectiveness	Market Penetration	Strength of Personality	Primary/Secondary Archetype
ABTA	No	14	3	35	13	Companion/Innocent
Checkatrade	Yes	14	12	12	27	Jester/Companion
Bella & Duke	Yes	16	8	28	17	Companion/Jester
Currys PC World	No	17	28	19	8	Rebel/Hero
Night Nurse	Yes	18	21	22	16	Jester/Companion
Oak Furnitureland	Yes	18	24	7	28	Jester/Companion
Sheilas' Wheels	Yes	18	33	17	9	Jester/Companion
Cinch	No	21	15	25	23	Companion/Jester
Compare The Market	No	21	39	12	12	Jester/Companion
Play OJO	Yes	23	16	16	32	Jester/Companion
Heart	Yes	24	29	14	22	Rebel/Jester
Funky Pigeon	Yes	25	36	6	26	Jester/Companion
Foxy Bingo	No	26	13	37	21	Jester/Companion
ASDA	No	27	30	27	18	Companion/Innocent
TSB	No	27	17	29	29	Companion/Innocent
Aquafresh	No	27	17	34	24	Jester/Companion
ETX Capital	No	30	24	36	19	Companion/Innocent

Brand	Contains Brand Name	Overall	Effectiveness	Market Penetration	Strength of Personality	Primary/Secondary Archetype
KIA	No	31	30	24	30	Ruler/Rebel
Hastings Direct	No	31	20	26	38	Companion/Jester
Tesco	No	33	40	9	36	Companion/Innocent
Mazuma Mobile	Yes	34	35	18	35	Jester/Companion
TalkTalk	No	34	19	32	37	Jester/Companion
Premier League (2020)	No	36	24	31	34	Rebel/Ruler

6.3 How Appeal is impacted by the power of the parent brand

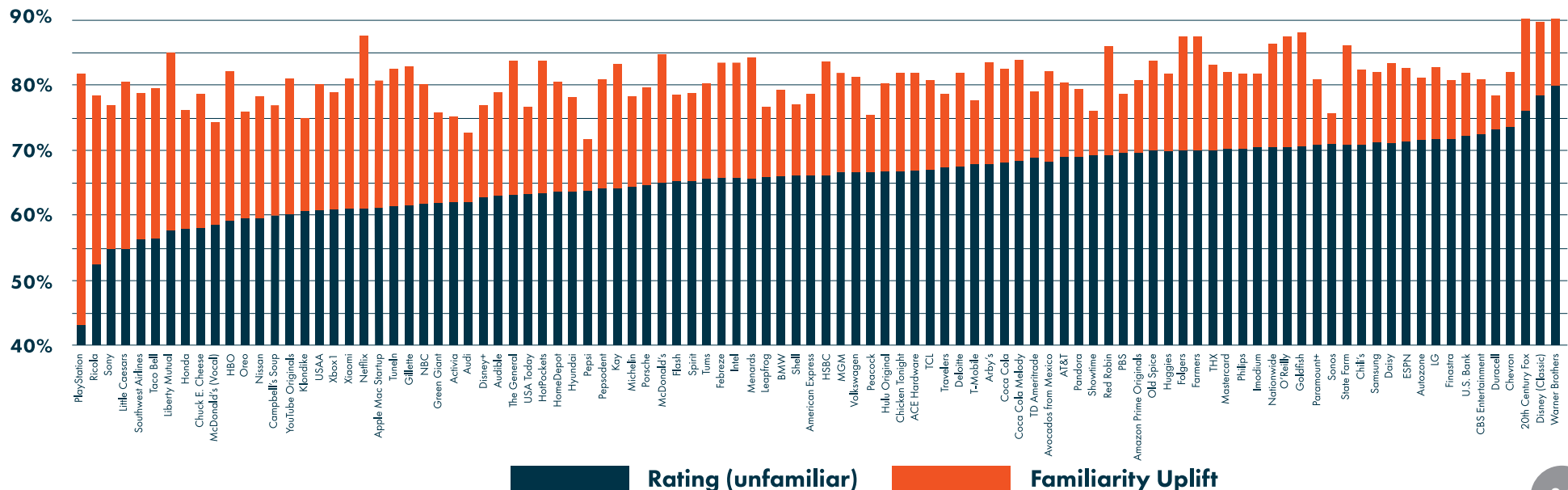
The chart below shows the uplift in appeal between those who associate the sonic logo with a specific brand, and those who do not.

The below table exposes how a consumer's appeal of a sonic logo is enhanced by their experience of and affinity with the brand itself. This has nothing to do with recall or distinctiveness but the enthusiasm for the brand itself for which the sonic logo provides a subconscious trigger. The blue bars represent the appeal of the logo to those that make no brand association, the orange bars indicate the increase in appeal when consumers are aware of the connection between the sonic logo and the parent brand.

The average uplift across all brands is 18% but the positive effect is universal across all sonic brands tested.

For the brands to the left of the graph it is the brand recognition/association that is doing the heavy lifting in terms of increasing the appeal of the logo – for the brands on the right it is the intrinsic appeal/quality of the logo that is doing most of the work.

Brand Familiarity Uplift





7

Coming
Soon...

In preparing this report we initially intended to include detailed analysis of each element that contributes to the overall rankings. However when we passed page 100 we realised that the data and insights generated were simply too many and too valuable to deliver effectively in a single publication.

Instead we have decided to first release this summary report with three further detailed reports to follow over the next three months, each informed by our first party data on in-market sonic logos and focusing on one of the three components that contributes to the overall success of a sonic brand:

Effectiveness:

We will take a deep dive into what an effective sonic brand sounds like, and why. We'll look at appeal, recall and the ability of each sonic logo to increase a consumer's subconscious propensity to buy.

Personality:

This will explore the complex but fascinating world of sonic logos and brand personality. We will reveal the key attributes that each brand is delivering with their sonic logo, the archetype(s) it is communicating and, using our powerful [BrandMatch technology](#), the percentage closeness of match between each logo and each brand.

Market Penetration:

We will examine which brands have achieved the highest awareness, recognition and attribution, what are the key drivers of this (time in market, investment, composition etc) and how to maximise your investment in your sonic brand.

These upcoming reports will provide detailed results on each metric that feeds into each of the components in respect of every brand featured in this report

In the meantime, if you cannot wait and are impatient to learn more about how your - or a client's - sonic brand is performing please do get in touch!



APPENDIX 1

Case Study: Fast Food Restaurants

Fast Food

Here we take a deeper dive into the results to conduct a side by side analysis of the sonic logos of some of America's favourite fast food restaurants.

The analysis that follows is similar to the work we do for major brands worldwide to help them identify the strongest option(s) for their new or revised sonic identity or for marketers to identify the best audio option for marketing campaigns.

Although this case study focuses on explicit testing we usually also conduct implicit testing in parallel to reveal the subconscious impact of the sonic logos on the minds of consumers. This implicit testing is based on research methodologies developed in partnership with the [Music, Mind and Brain faculty](#) within the psychology department at Goldsmiths, University of London.

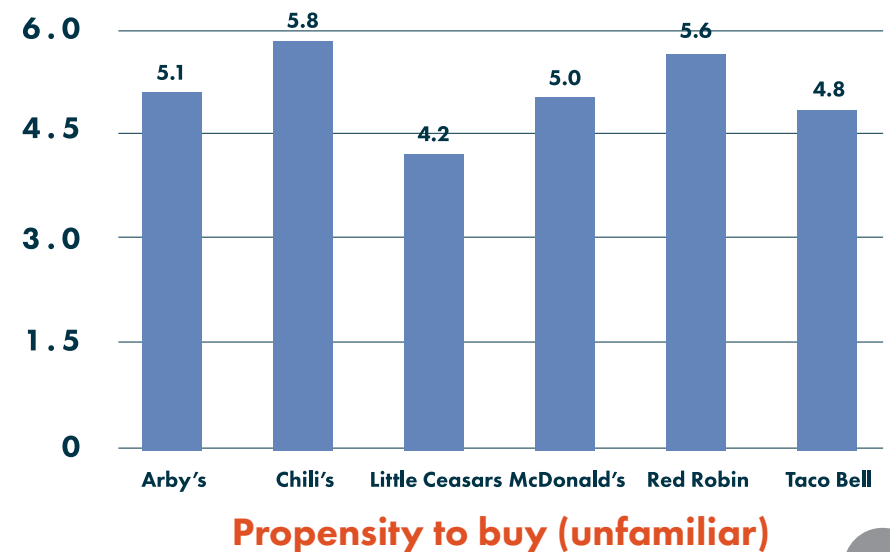
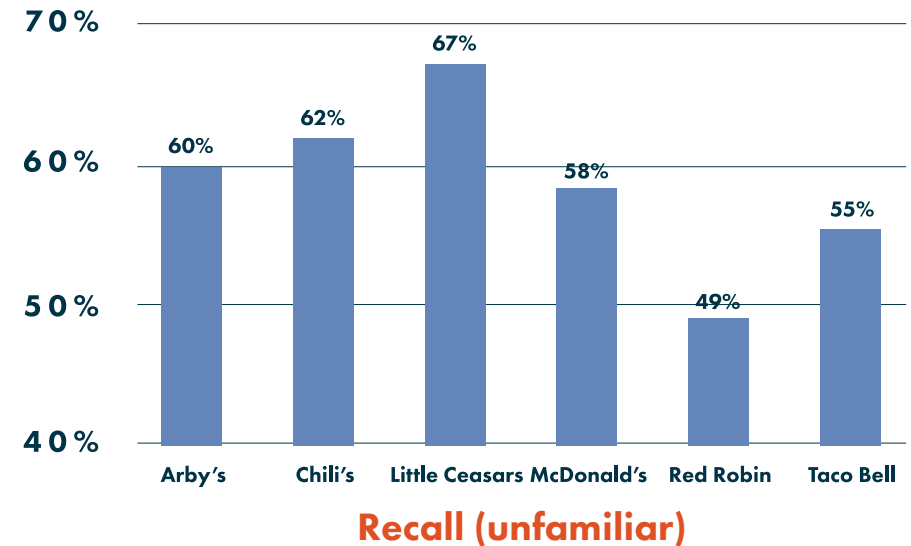
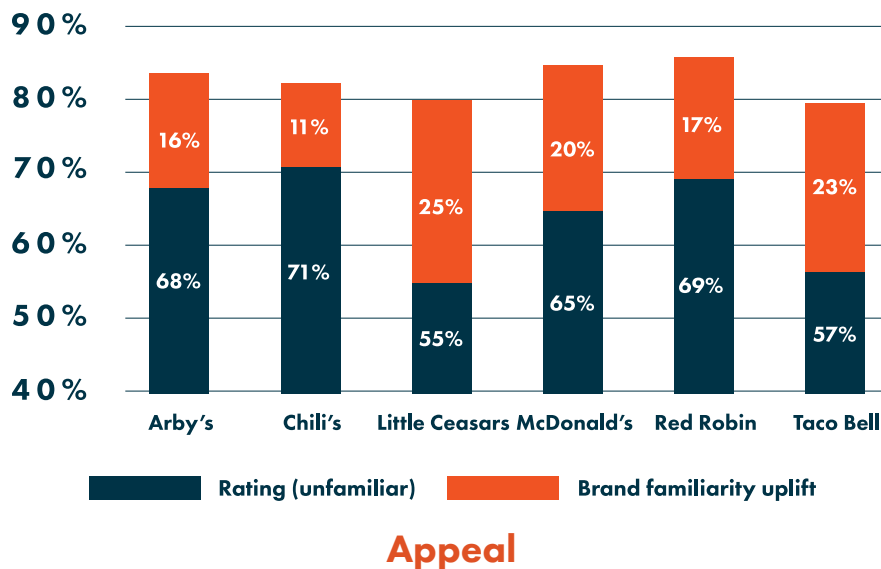


Effectiveness

Chili's and Red Robin have the most appealing sonic logos when rated by consumers who are unfamiliar with them. But for those that can attribute the brands, Little Caesars enjoys a 25% appeal uplift, suggesting that Little Caesars are the strongest brand in the eyes of customers.

Little Caesars also delivered the strongest recall with Red Robin the least memorable.

Chili's and Red Robin have the logos that are most powerful at driving propensity to buy, with Little Caesars the least effective.



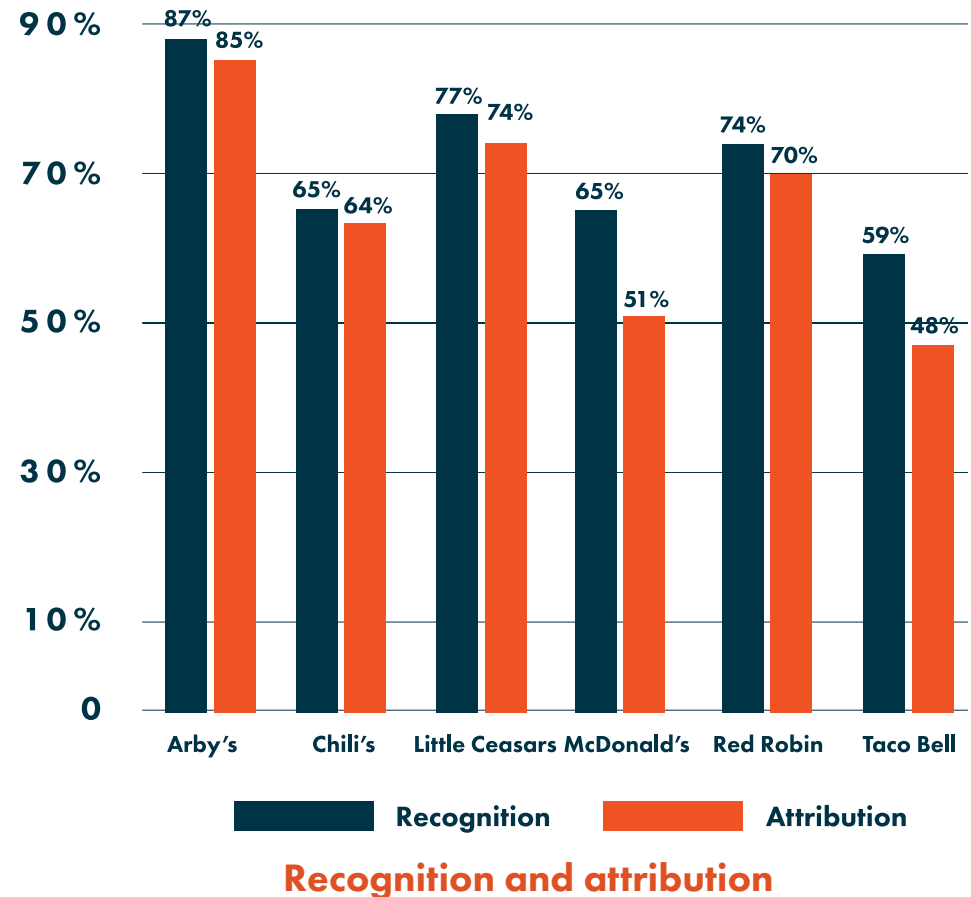
Market Penetration

Arby's "Arby's: We have the meats" is the clear winner here.

It is no surprise that the use of the brand name or a strapline in the sonic logo is highly effective in driving recognition and enforcing attribution.

Of the brands tested Arby's, Chili's and Red Robin all feature the brand name. Little Caesars contain the staccato 'Pizza Pizza' which is also clearly highly effective. The attribution/recognition ratio for these 4 brands is over 95%.

While all brands have performed well on recognition, the attribution/recognition ratio for McDonald's and Taco Bell is around 80%, suggesting that while these brand logos are widely recognized they are less well attributed to the parent brand.



Personality: Archetypes and Attributes

Chili's, Little Caesars and Red Robin are all Jester/Companion archetypes with attributes such as Funky, Funny and Cheerful.

As a chest beating carnivore, Arby's is the Rebel/Hero – tough, masculine and dominant and the Taco Bell sonic logo is in a similar place, albeit more authoritative.

In contrast McDonald's is a place for all the family - peaceful, cheerful and relaxed.

						
Archetype (primary) Archetype (secondary)	Rebel Hero	Jester Companion	Jester Companion	Companion Innocent	Jester Companion	Rebel Ruler
Top 10 attributes (of 212) communicated by each logo:						
Attribute 1	Masculine	Funky	Funny	Peaceful	Cheerful	Rebellious
Attribute 2	Intense	Upbeat	Simple	Cute	Fun-loving	Defiant
Attribute 3	Tough	Fun-loving	Quirky	Gentle	Upbeat	Combative
Attribute 4	Rebellious	Energizing	Energetic	Warm	Energizing	Tough
Attribute 5	Dominant	Cheerful	Child-like	Loving	Funny	Masculine
Attribute 6	Strong	Funny	Playful	Feminine	Joyful	Strong
Attribute 7	Bold	Energetic	Funky	Calm	Uplifting	Dominant
Attribute 8	Combative	Sexy	Fun-loving	Cheerful	Energetic	Authoritative
Attribute 9	Heroic	Playful	Western	Relaxed	Warm	Bold
Attribute 10	Daring	Joyful	Small-town	Tender	Colorful	Rugged

Attribute Map

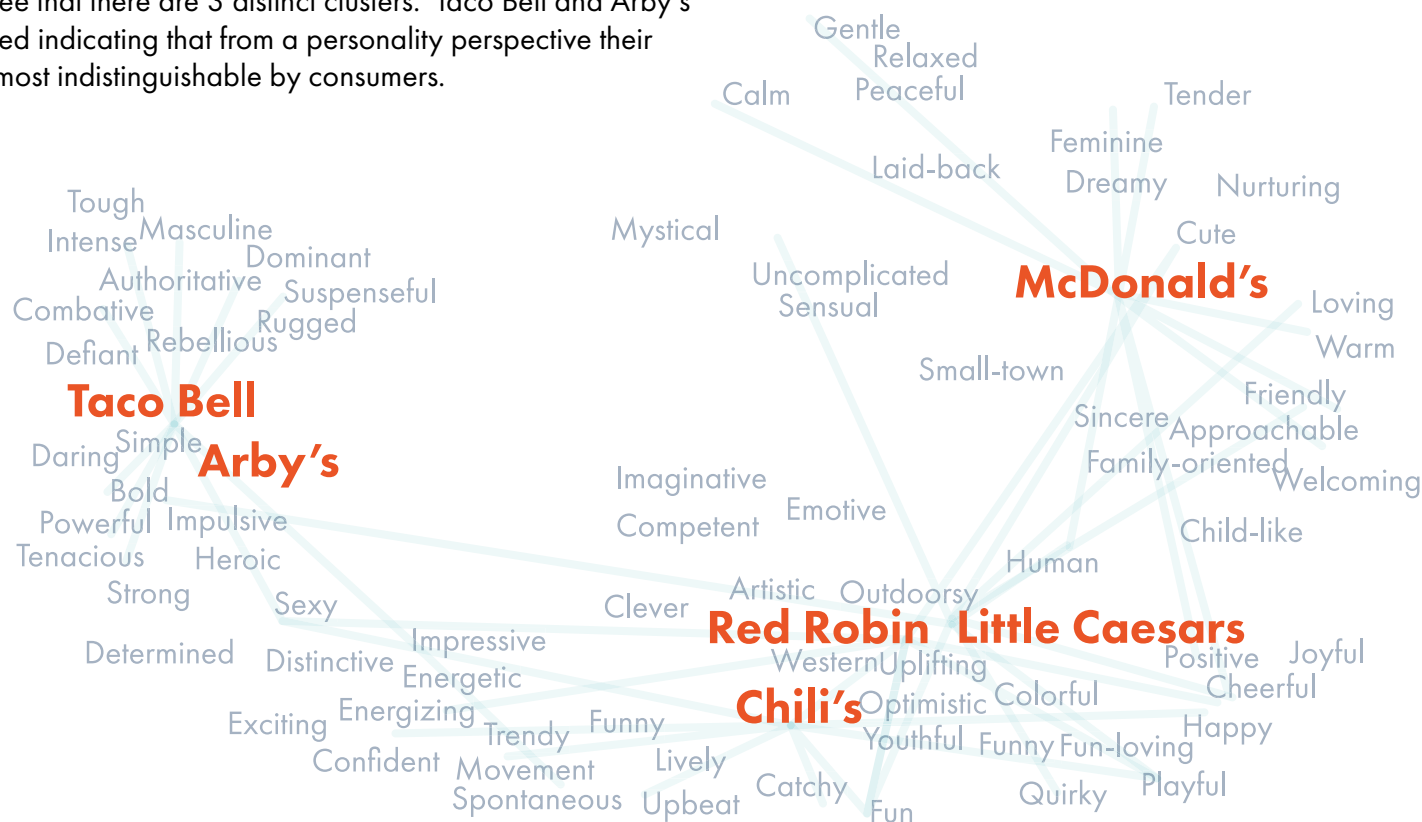
The image below contains an extract from our emotional DNA map of music. This was created by asking 500,000 consumers to rate hundreds of sonic logos and anthems against over 200 attributes and then using data science and machine learning to calculate the one on one relationships between every pair of attributes.

The six fast food sonic logos are plotted onto this map with the light blue lines representing the strength of correlation with each attribute.

From this we can see that there are 3 distinct clusters. Taco Bell and Arby's are tightly correlated indicating that from a personality perspective their sonic logos are almost indistinguishable by consumers.

Red Robin, Caesars and Chili's form their own cluster with McDonald's out on its own in terms of personality positioning.

We will explore the various applications of the personality map in our upcoming report on Personality. In that report we will illustrate how it can be used to better understand the core brand personality and ensure that a new sonic logo reinforces and supports this.



Personality: BrandMatch

BrandMatch maps the personality of any sonic logo, musical composition or voiceover to the personality of the brand (as defined by the brand or by consumers of the brand). If the brand personality is defined by the brand itself, this calculates the 'aspirational' BrandMatch. If the personality is defined by consumers (as is this case for this case study) we are looking at the actual personality.

- BrandMatch is based on Dr Jennifer Aaker's 'Dimensions of Brand Personality' framework and distils over 200 personality traits into 14 key attributes that between them capture over 95% of the overall personality of a brand or music composition. These are then statistically grouped into 6 'components' that define the shape of the brand or music personality.
- The reference personality of each brand was defined by 200 consumers familiar with each brand using the 14 key attributes, and each sonic logo was then tested against the same 14 key attributes with consumers in each territory.

SoundOut BrandMatch methodology was then used to quantitatively measure the personality match between each sonic logo and each brand's personality as defined by consumers.

- While the match between each of the 6 components is calculated by reference to the difference between the two, the overall BrandMatch score also takes account of the overall shape of the brand personality and the personality shape of each asset tested.

**200+
Attributes**

BrandMatch Attributes

Principal Component

Peaceful
Pure
Warm

Relaxed

Fun-loving
Spontaneous
Joyful

Vibrant

Defiant
Bold

Daring

Confident

Confident

Technical

Technical

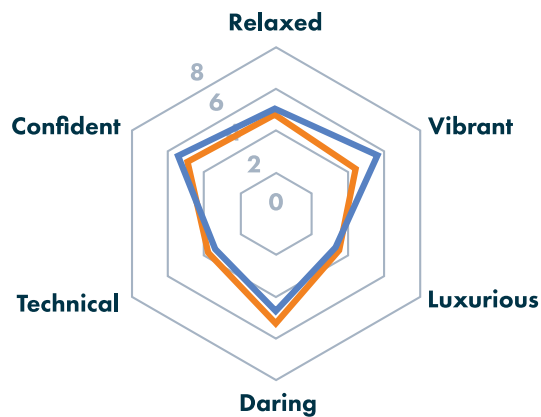
Majestic
Simple
Intense
Sophisticated

Luxurious

Personality Plot: BrandMatch

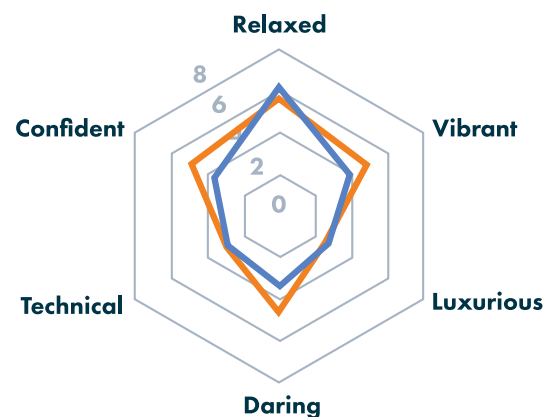
For each of the brands we asked 200 consumers to define the brand personality of the brand using the 14 BrandMatch attributes by exposing them to the visual logo (without sound). BrandMatch algorithms were then used to plot the actual consumer definition of each of the brands (the orange

plot below). We then overlaid the personality of each of the respective sonic logos (again as defined by consumers listening to the sonic logo but without the visual logo).



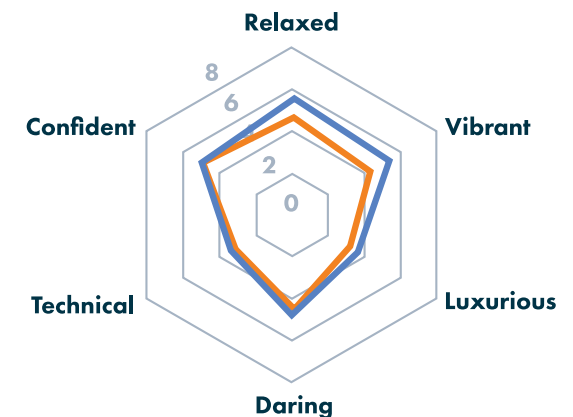
92% Brand Match

■ Chili's sonic
■ Chili's visual



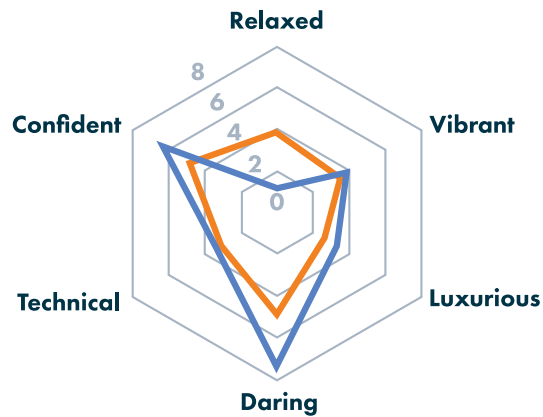
89% Brand Match

■ McDonald's sonic
■ McDonald's visual



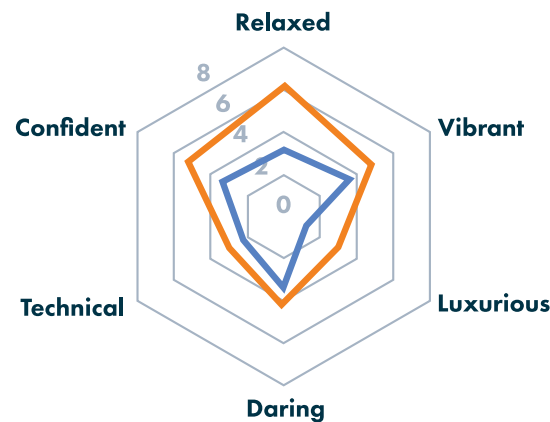
94% Brand Match

■ Red Robin sonic
■ Red Robin visual



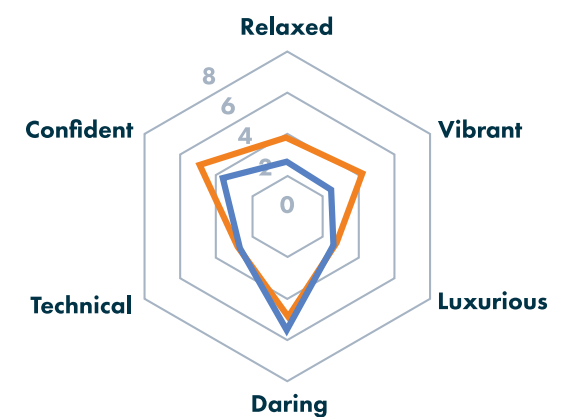
82% Brand Match

- Arby's sonic
- Arby's visual



82% Brand Match

- Little Caesars sonic
- Little Caesars visual



85% Brand Match

- Taco Bell sonic
- Taco Bell visual

As these are all established brands the sonic logos have had extensive market exposure and through this have clearly adopted much of the personality of the parent brand. The logos have become powerful 'signposts' for the core brand and so when hearing the logo the emotional response is very similar to exposure to the brand itself. For new sonic logo's we typically look for an initial BrandMatch of 60%+ meaning that the personality match is close enough for a strong brand relationship to form through repeat exposure over time.

While all these results are very strong, the Arby's logo is perceived as being less relaxed and more daring than the brand itself and the Taco Bell sonic logo falls short on confidence, vibrant and relaxed when compared to the core brand personality as perceived by consumers.

For each brand and sonic logo we also have individual and percentile scores against over 200 distinct brand attributes – please do contact us if you want to view yours...

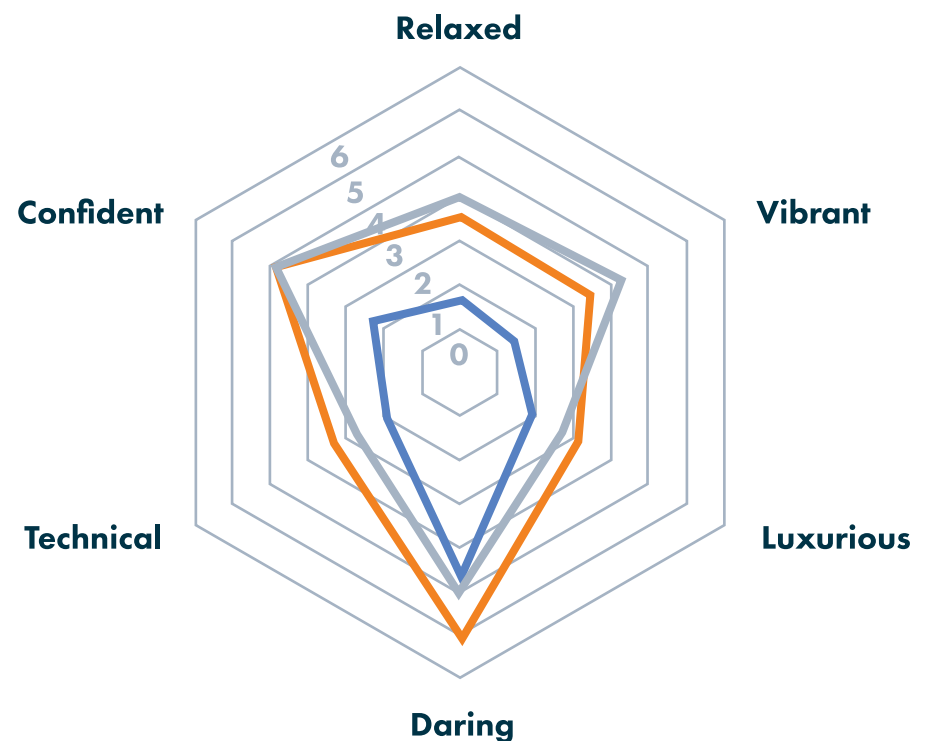
BrandMatch: The personality impact of brand awareness

Here we plot the same personality of Taco Bell (defined by consumers based on the brand logo) against the sonic logo as rated by those unfamiliar with the sonic logo (no attribution) and those who could attribute the sonic logo to Taco Bell.

For those able to attribute the sonic logo to Taco Bell the personality match was a near perfect 90% indicating that the sonic logo and the Taco Bell brand are virtually synonymous. For those who could not attribute the sonic logo to Taco Bell we see a less strong 76% match. The results tell us two things

- the brand association between Taco Bell and it's sonic logo is very strong and the sonic logo has, by association adopted the Taco Bell personality
- even without a brand association, the Taco Bell Sonic logo is a good fit to the Taco Bell brand personality (as defined by consumers)

In our future report on Personality we will explore these associations (and others) across all brands in this report, as well as exploring the benefits of having a strong personality match when creating a new logo in driving recall, recognition and attribution.



Unfamiliar - 76% BrandMatch
Familiar - 90% BrandMatch

- Taco Bell Unfamiliar
- Taco Bell Familiar
- Taco Bell Brand



APPENDIX 2

Approach and Methodology

All testing was conducted with the [SoundOut 3.5m strong consumer panel](#) during March and April 2021. The testing was 100% monadic, i.e. each sonic logo was tested in isolation with 200 US or 200 UK consumers with no associated images or brand attribution. For each logo the following methodology was used:

Effectiveness:

When calculating effectiveness metrics we only used responses from consumers who were not familiar with the sonic logo. This ensures that any existing brand association/affiliation with the consumer does not skew the results for the logo in isolation.

Appeal: Measured by asking the consumers to rate the sonic logo on a scale of 0-10.

Recall: How well can the consumer hum, tap or sing the logo. These results are over 90% correlated by the mentions of the brand name in the written reviews.

Propensity to buy: This was established by running a proprietary implicit test on the sonic logo developed in partnership with the psychology department of Goldsmiths, University of London, measuring the subconscious impact on consumers' willingness to purchase.

Market penetration:

Recognition: A simple question asking how familiar the consumer is with the logo.

Attribution: Can the consumer name the brand associated with the logo.

We would like to thank Jon Brennan of Sonic Signatures and Fran Board of The Sound Agency for their assistance in sourcing many of the sonic logos tested. Fran Board was also responsible for providing the data and commentary contained in section 4 of this report.

Personality:

Attributes: Benchmarked ratings against 212 key brand attributes demonstrating the character of the logo and where and how strongly the logo is delivering emotion. This benchmarking is against our recently completed project in which we analyzed hundreds of sonic logos with over 500,000 consumers to create robust benchmarking scales for an exhaustive list of brand attributes.

Archetype analysis: By expert mapping the performance of all 212 attribute scores to 12 key brand Jungian archetypes we identify the primary and secondary archetype for each sonic logo revealing the personality the logo is actually communicating to consumers (which may or may not be aligned with the host brand archetype).

Strength of personality: This measures the overall emotional impact of the sonic logo on the consumer and is calculated by testing each logo against our 14 core BrandMatch attributes that between them capture over 95% of any brand's personality. While this is simply an average score it is effective in capturing the emotional intensity of the logo.

Match to Brand: In one of our future reports we will release results measuring how closely the intrinsic personality of each sonic logo maps onto the perceived personality of each of the brands (as defined by consumers). This is based on our proprietary BrandMatch technology used extensively in sonic branding projects worldwide. In the meantime we can give you access to our online BrandMatch tool so you can define your own brand personality and calculate the percentage match to your sonic logo.

All numbers in the overall tables are rankings, if you are interested in seeing the detailed underlying data for your brand or client, please do contact us.



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Contact: david@soundout.com