

The SoundOut Index 2025

United States Edition

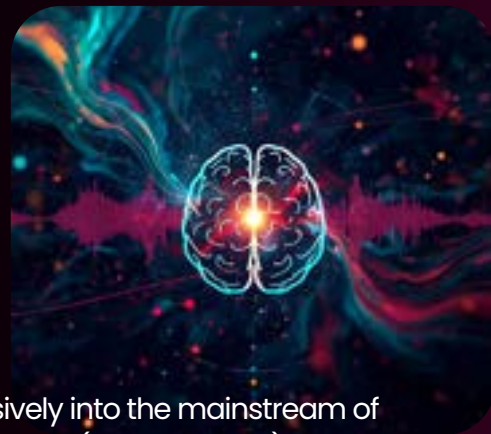
Brand tracking of 174 sonic brands
2023–2025

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1. Introduction

Welcome to the 2025 SoundOut Index, the definitive tracking study of sonic brands across the US market.



Over the past two years, sonic branding has continued to move decisively into the mainstream of marketing. A recent global ranking¹ found that over half of leading brands (139 out of 250) now deploy a sonic logo, which means that if you don't have one, you are now in the minority.

In the US alone, over 40 notable new sonic logos were launched by brands since 2023 and most of these are covered in this year's index. This widespread growth is projected to continue, with analysts forecasting about 12% annual expansion in the global sonic branding market through the rest of the decade.²

Crucially, new research has cemented why this sonic boom is happening: audio branding works.

The comprehensive 2025 analysis by System1³ found that sonic cues in the first seconds can lift brand awareness by 191%, far outperforming static visuals (see section 10 below).

Brands are learning that sound not only amplifies brand recognition, but also enhances brand perception and even purchase intent. In fact, music aligned with brand identity doesn't just build equity – it can also trigger short-term sales uplift, making a coherent sonic strategy more important than ever.

In summary, the 2023–2025 period has been transformative for sonic branding. Hard evidence now validates that a strong sonic identity is a powerful driver of brand recognition, customer engagement and even ROI. Adoption has broadened and strategies have matured, with U.S. brands at the forefront of this evolution. Backed by data and bolstered by a growing audio-centric culture, sonic branding has evolved from a nice to have into an essential, integrated brand asset: one poised to help define the winners in an increasingly sound-driven world.

David Courtier-Dutton & Grace Hammond
Co-founders

1. Amp Sound Branding's "Best Audio Brands" report 2024

2. Future Market Insights, Sonic Branding Market Report, 2022

3. [https://2235762.fs1.hubspotusercontent-na1.net/hubfs/2235762/The%20Long%20and%20the%20Short%20\(form\)%20of%20it.pdf](https://2235762.fs1.hubspotusercontent-na1.net/hubfs/2235762/The%20Long%20and%20the%20Short%20(form)%20of%20it.pdf)

2. Highlights – key insights

While this report includes a host of information, these are the key insights...

- If you have an old, well loved yet retired sonic logo at the back of the drawer, pull it out, dust it off, refresh it and start using it. The performance of Maybelline's new and refreshed 25 year old logo has been exceptional, leaping into 20th place overall (out of 174) in terms of consumer attribution. Why try and build new memory structures when you can simply tap directly into well-established neural pathways hardwired into consumers?
- If its brand salience and brand equity you are after, never forget that attribution – can the consumer name your brand from the sonic logo alone – is about the only metric that matters in sonic branding. Sonic branding awards, trophies and other navel gazing industry recognition might stroke your ego but they will not move the effectiveness needle.
- Claimed attribution is not the same as actual attribution. Consumers who claim to know the brand behind a sonic logo only correctly name the brand 43% of the time. If the logo has no brand name this collapses to 18%. But if a brand name is included in the logo this rises to 77%.
- When we analyse actual attribution more closely, sonic logos that include the brand name are almost 10 times more effective than those that do not (5% actual attribution vs 46% actual attribution). This is a wakeup call for the industry. A full analysis of this is included in section 8 below.
- 22 of the 25 top performing sonic logos include the brand name in the sonic logo. And 90 of the bottom 100 performing sonic logos do not include the brand name. Sonic purists may wince but the data is unequivocal.
- New 2025 research from System1 has categorically proved that sonic assets are (by far) the most effective way to hook attention, drive brand recognition and maximise brand awareness (see the next section) – 5 times more effective than the brand name/visual logo.
- In the light of the System1 findings and the supercharged ability of logos with brand names to deliver 9X increased brand attribution to pure musical logos, we would strongly advise businesses to initially include the brand name in the logo until consumer traction is achieved, at which point the brand name can be dropped.
- While AI has yet to have a major impact on sonic branding, it is poised to transform sonic marketing (longform music for commercials and social). When AI can demonstrably generate appropriate music that is better, faster, cheaper and more effective than humans can, widespread adoption is inevitable.
- AI is having a major impact on professional level brand analysis. New free tools such as SoundOut Insight enable deep and instant analysis of how brands are presenting themselves and how they are actually perceived by consumers. A key resource for agencies and sonic branding experts pitching for business: [Try the Brand Tracker Here](#)

**sonic logos that
include the
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3. The SoundOut Index 2025 – the largest ever consumer study of US sonic brands

This report is underpinned by over 70,000 consumer studies in the US market conducted between April – August 2025 and represents the most rigorous tracking study ever conducted on sonic branding.

Furthermore, The SoundOut Index is the only market-wide sonic logo study that actually measures what matters in sonic branding – actual consumer recognition and attribution.

While there are other excellent studies out there – such as AMP's Best Audio Brands annual report, that report ranks brands based on an audit of how consistently and effectively brands use sonic assets across touchpoints, scored on music use, sonic identity presence, brand fit & uniqueness, and efficiency. It does not measure actual sonic branding effectiveness or market penetration (and does not claim to). As such, it is divorced from actual consumer awareness/resonance.

Comparing the SoundOut Index to AMP's Best Audio Brands rankings is therefore comparing apples to pears. The Amp study rewards brands that demonstrate a holistic use of sonic branding while the SoundOut Index has a focus on actual sonic logo effectiveness – as measured with consumers.

This throws up some interesting results – Mastercard ranks No1 in the Amp report, but ranks 136th (out of 174) for brand attribution in our consumer study. From this we can surmise that while Mastercard may be executing flawlessly on their sonic branding strategy, for whatever reason, this strategy is failing to translate into actual marketing effectiveness with consumers.

Conversely Arby's clinches the number 1 spot in this year's SoundOut Index, with 86% unprompted consumer attribution, while in the Amp report it sits in 93rd place (out of 100).

The purpose of the above is not to discredit or question the Amp report, but rather to demonstrate that there is a divide between brands that appear to excel at sonic strategy and those that actually excel at sonic effectiveness. There is in fact actually a small negative correlation (-0.07) between the Amp rankings and the SoundOut rankings.

In addition to testing 174 sonic logos we also refreshed every personality profile of all 174 brands by asking consumers to also rank the actual brands⁴(as represented by their visual logo) against 14 core attributes that map to our 240 attribute BrandMatch framework. As a result we also have robust consumer sourced personality profiles for each of the brands enabling us to measure the match between the brand personality and any sonic logo personality.

The content of this report only exposes a fraction of the data we have collected. We have multiple other datapoints (appeal, recall, recognition, propensity to buy, distinctiveness, 1,000's of words of written reviews per brand etc) as well as detailed segmented analysis by gender, ethnicity and age. An example is set out in Appendix 3. For more information on your brand please do not hesitate to get in touch with us at: info@soundout.com.

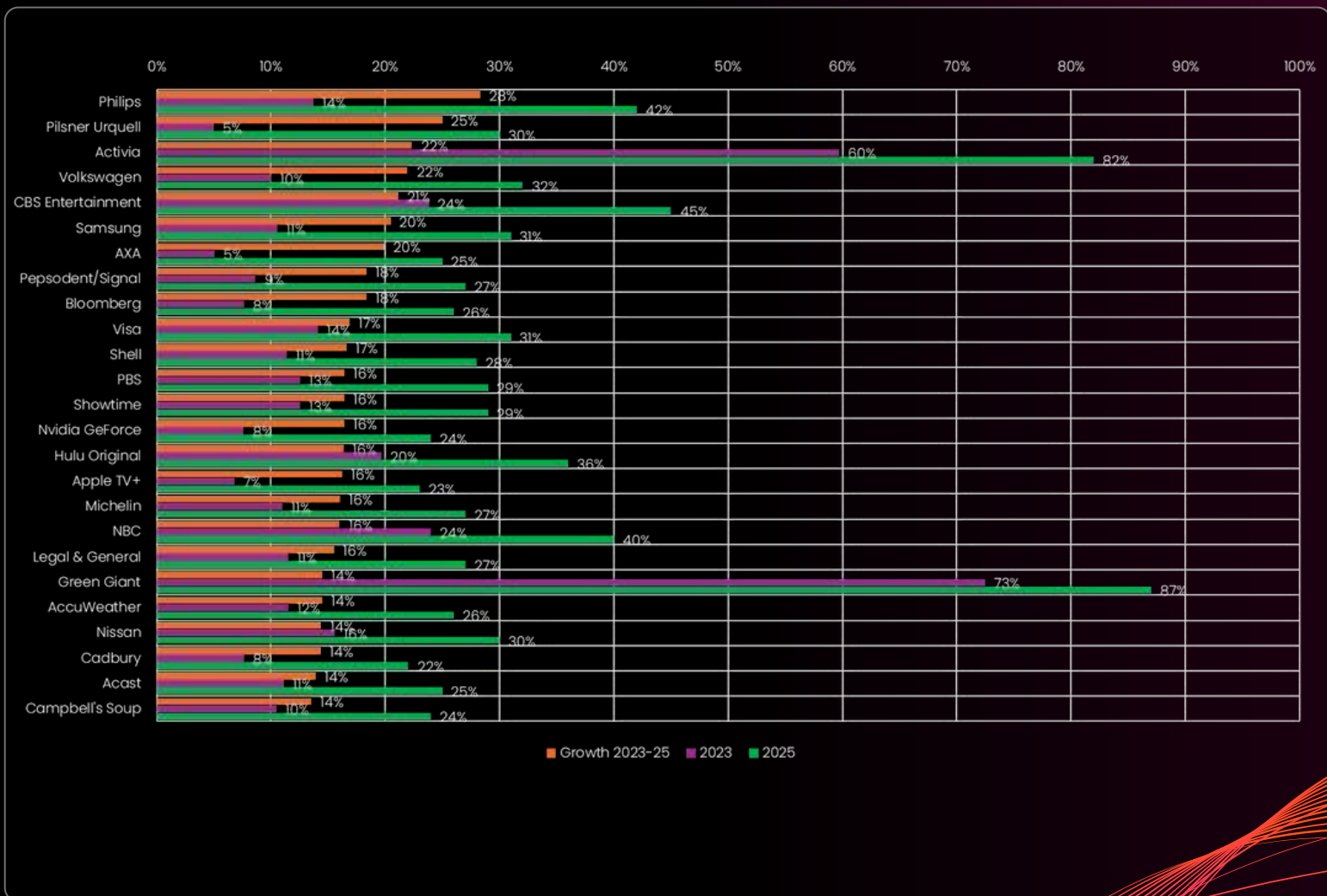


4. Sonic brand tracking: The fastest growing sonic brands 2023–2025

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, the ability of a consumer to name your brand from the sonic logo, 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.

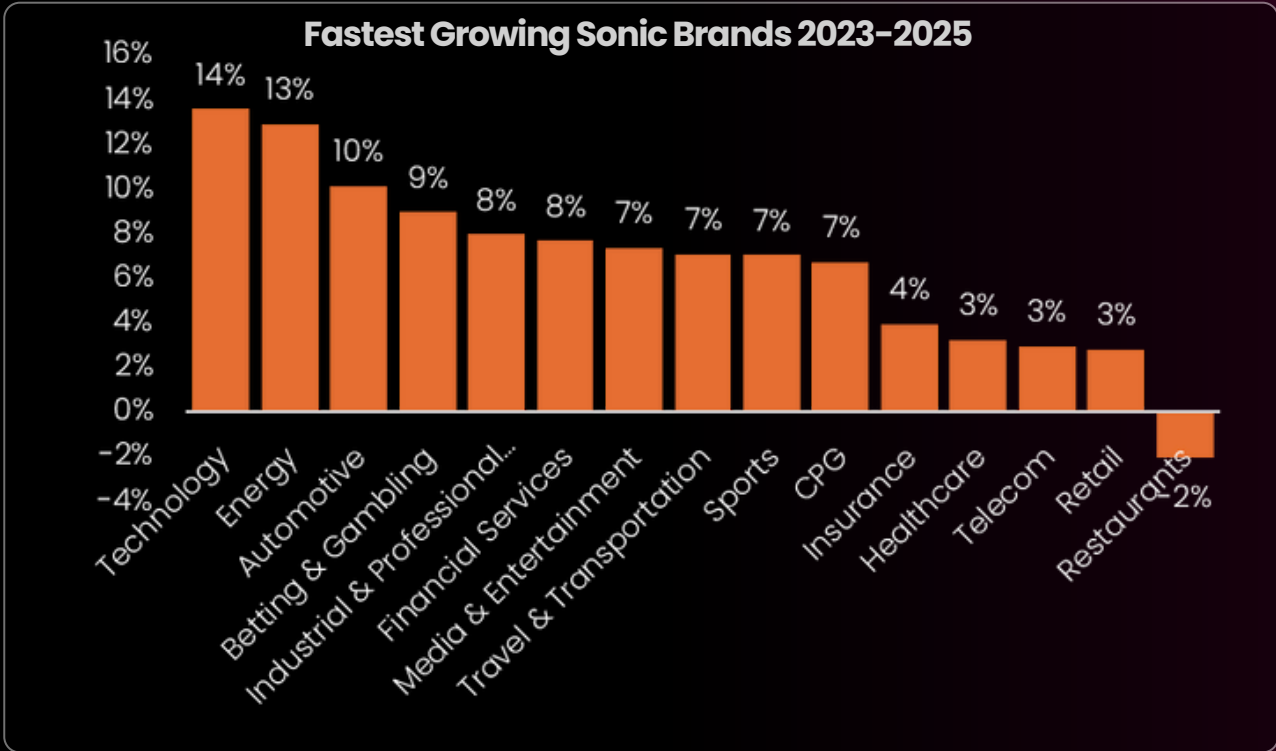
To measure the fastest growing sonic brands we took the percentage of consumers who claimed they could, unprompted, name the brand in 2025 and compared this to the results in 2023.⁵ The absolute percentage uplift in attribution is a direct reflection of how successful each brand has been in increasing the consumer connection between the sonic logo and the brand itself over the period. This sonic brand tracker is the best measurement of success in sonic branding:



5. Note that this analysis excludes new sonic logos launched in the past 2 years

5. Growth by industry

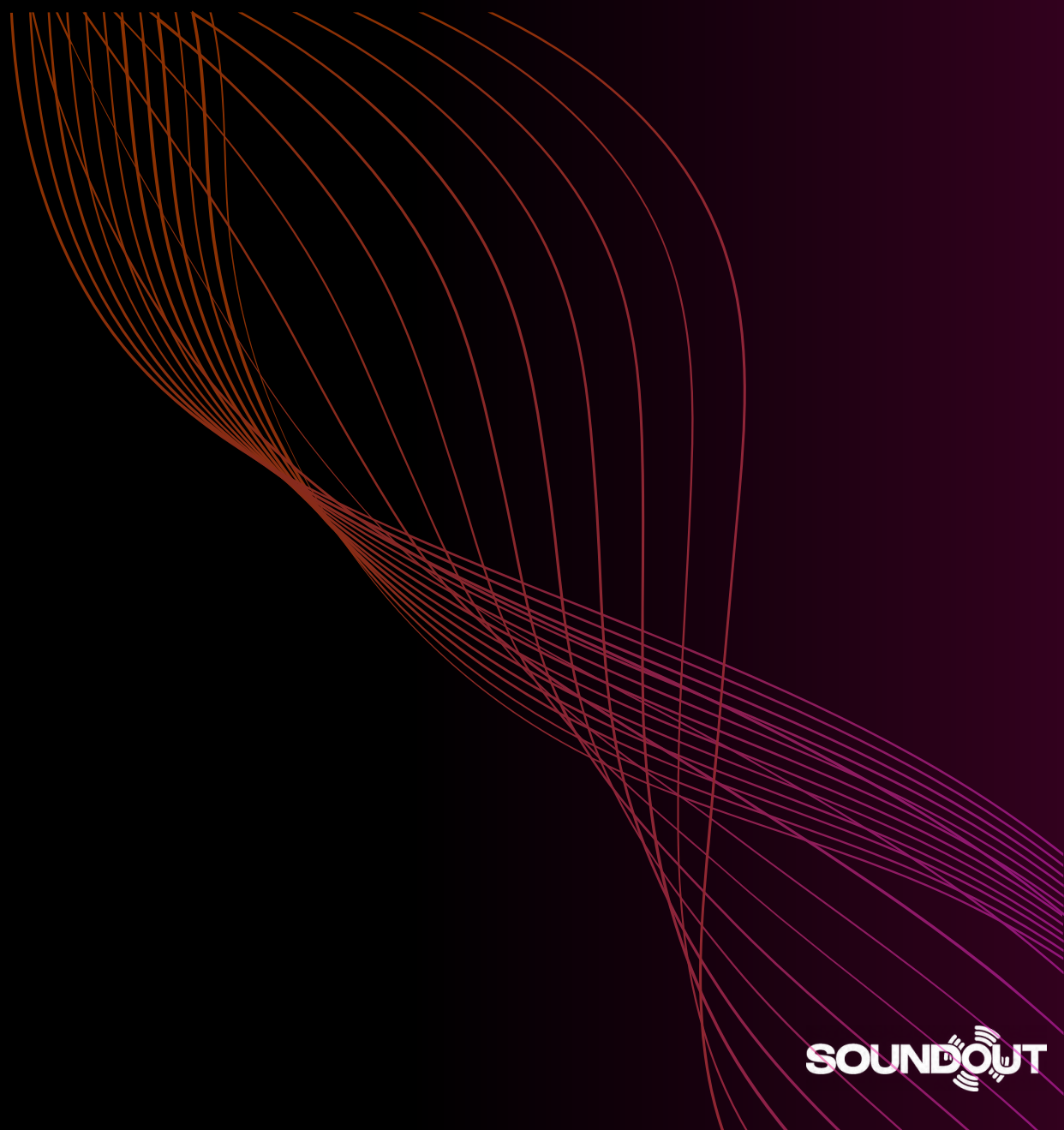
Between 2021 – 2023 it was clear that some industries (such as insurance) were doubling down on sonic branding. However over the past 2 years we have seen all sectors increase their average attribution scores, underlining the increasing awareness and prominence of sonic branding across the market. This has no doubt been helped by the explosion in short form TikTok/Reels/podcast advertising where the default ‘sound on’ nature of these platforms lends itself to significantly increased exposure for sonic branding that previously had been largely restricted to TV advertising, pre-rolls and radio.



Sector	Companies per sector
Retail	6
Medical/Pharmaceuticals	2
Insurance	9
CPG	37
Entertainment	37
Telecommunications	2
Financial	10
B2B Services	4
Travel	2
Automotive	12
Oil & Gas	2
Technology	8

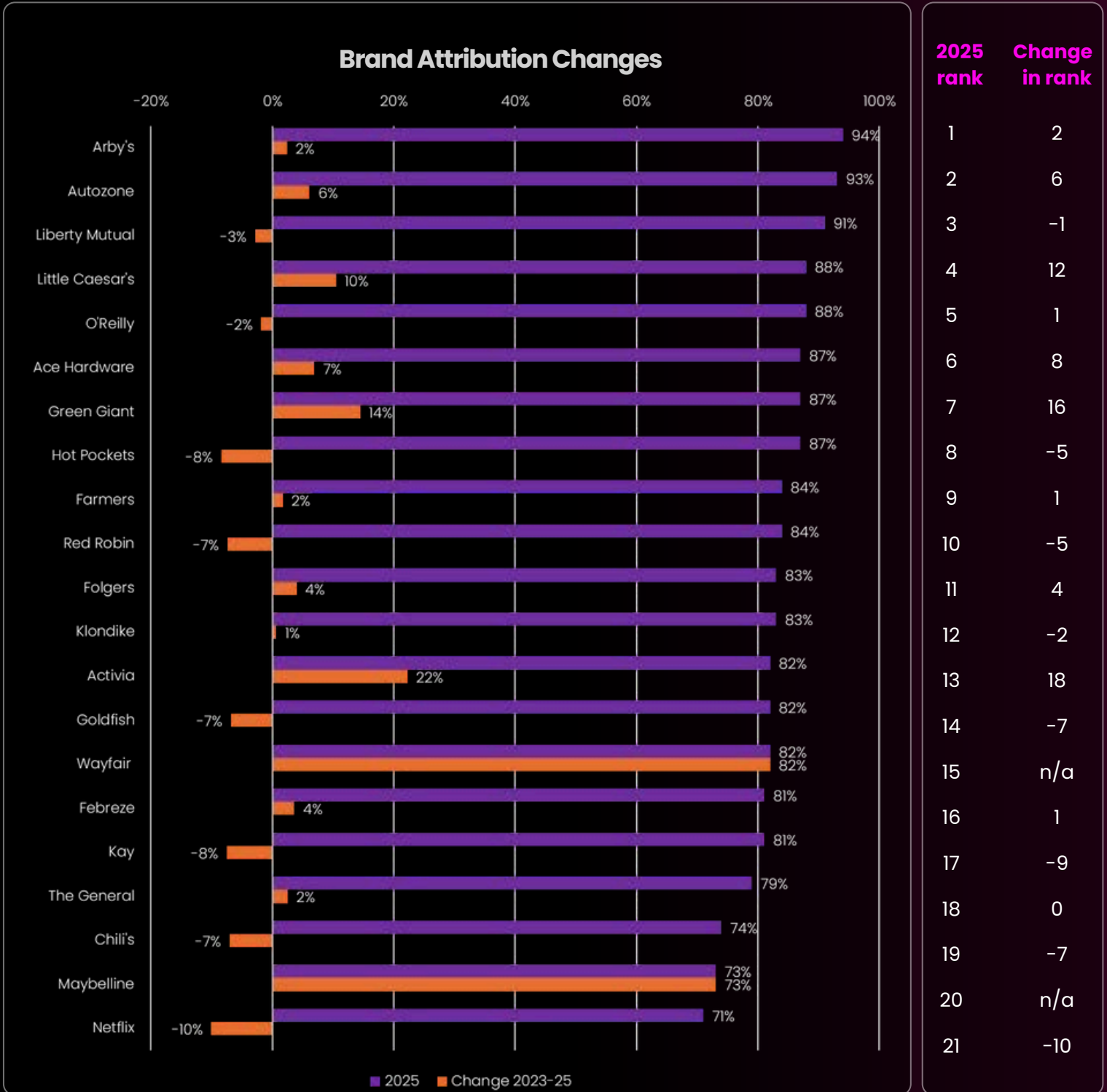
Some of these sectors do not have enough brand participants to draw firm conclusions from but a rise in automotive from just 25% to 36% represents a significant leap (almost 50% rise) against a challenging business background. Insurance, that leapt 15% between 2021-2023 may have only bumped 4% but this was from an already high base (55%). Financial businesses have made steady progress from 22% to 29%, a 7% increase – an encouraging result considering the characterless nature of most financial brands.

6. The top 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 (claimed) attribution and the increase/decrease in attribution of these sonic logos over the past 2 years.



Arby's have taken top spot in 2025 moving up from 3rd position in 2023. Hot Pocket's, our leader in 2023 has dropped 5 places to 6th.

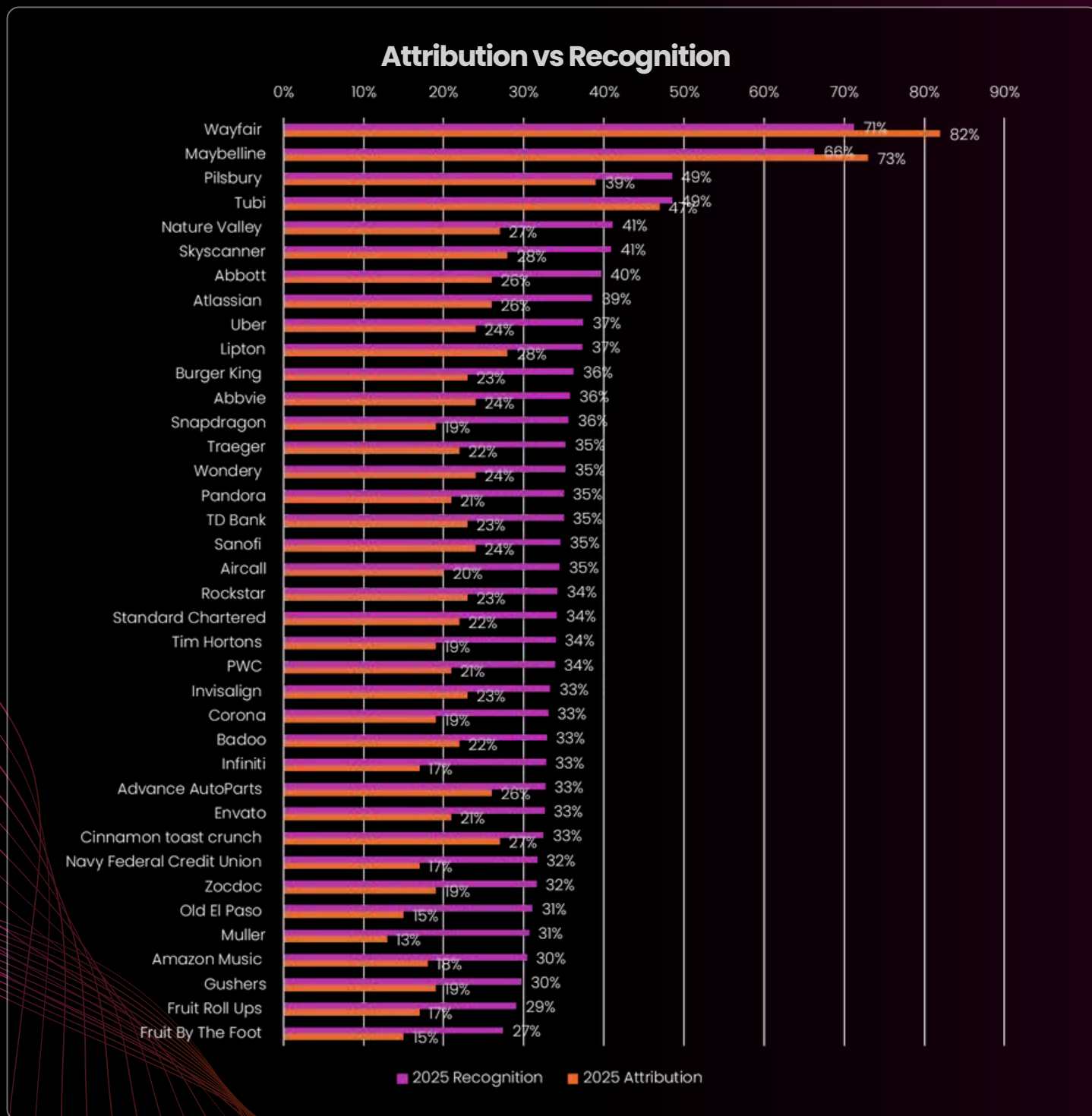
Of the sonic logos around in 2023, it's Activia and Green Giant and Little Caesar's that have stormed up the charts, posting gains of 18, 16 and 12 positions respectively. However, there are some notable new entrants in the top 20 rankings, Maybelline and Wayfair have achieved a sensational debut, achieving 82% and 73% attribution out of the blocks. Unsurprisingly they both clearly include the brand name in their sonic logo plus Maybelline has a very strong heritage sonic logo on which the new iteration has been evolved from. Notwithstanding this, it is an impressive achievement to create a near instant and highly valuable sonic DBA from a standing start.



7. 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:




The new Wayfair sonic logo (“Wayfair, every style every home”), launched last year, has clinched the top spot in 2025 with a huge 82% attribution. The Wayfair brand name is front and centre in what is a classic jingle approach to sonic branding. It also scores 71% recognition indicating strong market penetration and Actual Attribution (see section 9 below) is also a very impressive 71%.

The other standout performer is Maybelline. The Maybelline logo is an evolution of their powerful and iconic 1991 jingle. Pushed hard on social, it earned more than 40 million TikTok views in its first month and already enjoys 73% claimed attribution and 66% actual attribution.

Similarly to Maybelline, the performance of the fourth placed updated Pillsbury sonic logo underlines the effectiveness of updating/leveraging a legacy sonic asset. This logo has the doughboy giggle but no brand name and achieves a very impressive 39% claimed attribution and 28% actual attribution.

Made Music were responsible for the creation of Wayfair and Pillsbury and are clearly at the top of their game.

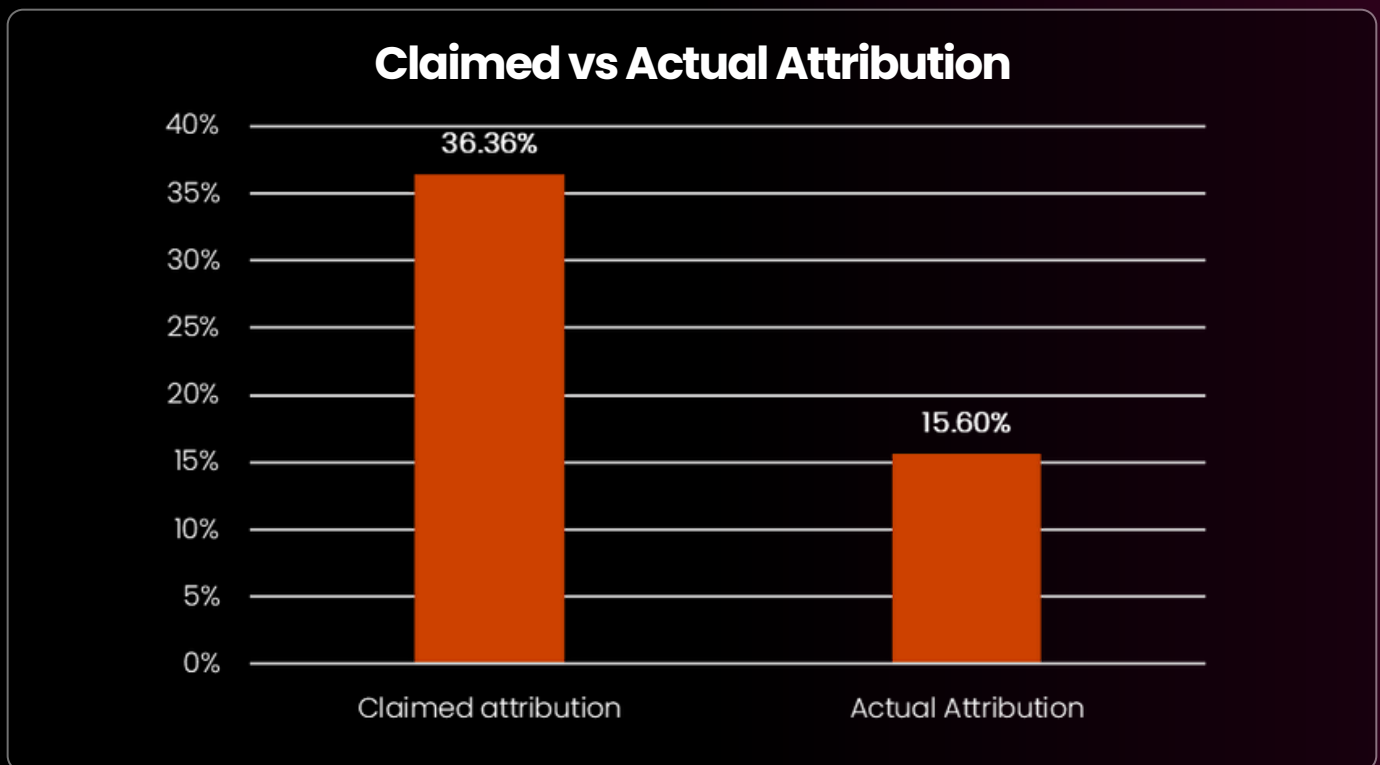


8. An uncomfortable truth – claimed attribution vs actual attribution

Analysis of Claimed vs. Actual Sonic Logo Attribution

In the data above, attribution is measured by asking consumers if they could confidently name the brand. However this year we asked a follow up and asked consumers to enter the actual brand name.

The data from over 70,000 U.S. respondents reveals a striking and consistent gap between claimed attribution (listeners stating they recognize the brand from its sonic logo) and actual attribution, where they correctly name the brand. On average, claimed recognition is 36.4%, while actual correct naming of the brand falls to just 15.6%, meaning over half of those confident they “know” the brand cannot recall it accurately when tested. Full results for all brands are included in Appendix 1.



From a music psychology perspective, this “recognition-recall gap” is well documented. Recognition tasks (“Do you know this sound?”) rely on familiarity, a relatively shallow memory process triggered by repetition, timbre, or rhythm. In contrast, recall tasks (“What brand is this?”) require a deeper associative link between the sonic cue and stored brand information.

Many sonic logos succeed at creating a sense of familiarity - through catchy motifs, consistent use, and exposure - but fail to firmly encode the brand name in the listener’s memory.

Two cognitive factors intensify this effect: source amnesia (remembering the sound but forgetting its origin) and semantic interference (confusing it with similar audio cues from other brands).

We are all familiar with this - we recognise a song we’ve known for years but cannot for the life of us name the artist or the song name, there is a connection but not quite strong enough to trigger the name. In addition, the increasing prevalence of short, minimalist sonic cues, often just a few notes, also raises the likelihood of overlap between brands, diluting distinctiveness.

From a market research standpoint, this gap underscores a critical weakness in brand-asset linkage. High claimed recognition without corresponding attribution suggests that the sonic identity is operating as “background branding” – pleasant but commercially underleveraged. Stronger integration with visual assets, verbal brand mentions, and contextual reinforcement is essential.

In practice, marketers do not treat sonic branding as an isolated mnemonic, but as part of a multi-sensory ecosystem, ensuring the brand name is actively paired with the sonic cue in varied contexts. However even with this reinforcement, widely heard sonic logos risk becoming anonymous earworms – audible, memorable, but ultimately unclaimed.

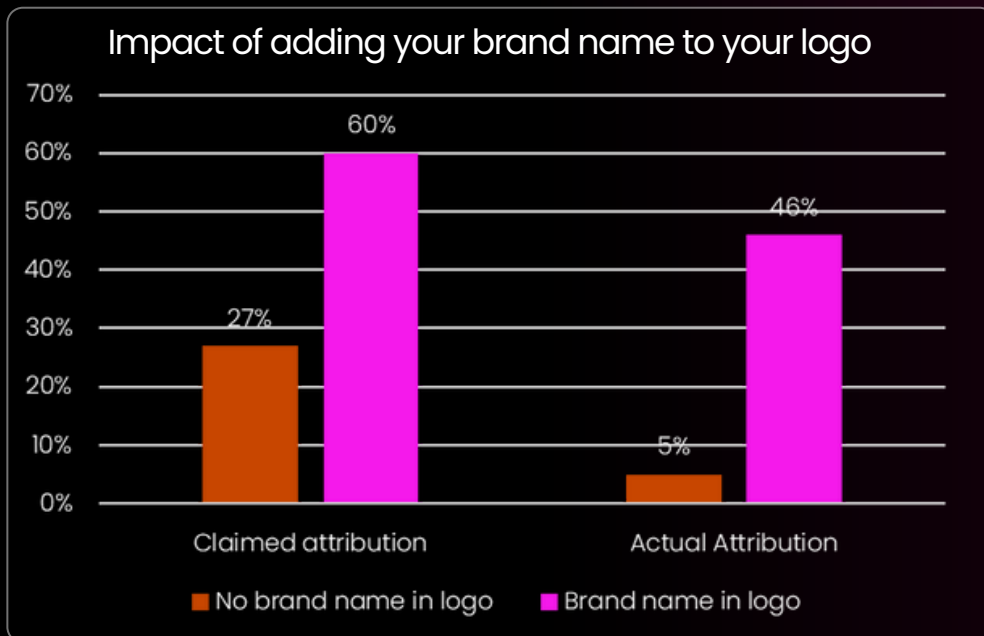
This recognition/recall gap varies dramatically by brand, offering valuable insight into both successes and failures in sonic branding execution.

Financial services companies seem particularly exposed to this, with Visa showing a 31% claimed attribution rate but 0% actual recall, Mastercard, their key competitor, has 20% claimed attribution but also 0% actual. These are textbook cases of source amnesia: the sound is familiar, but the mental link to the brand is unformed, likely due to sporadic use or a lack of distinctiveness with competing similar sounding audio from other advertisers.



The power of including the brand name in the logo

The obvious quick (and highly effective) fix for this is to include the brand name within the sonic logo. The effectiveness of this is starkly illustrated when we split the brands that include the brand name and those that do not:



While adding the brand name is just over twice as effective in claimed attribution, when we look at actual attribution we see that including the brand name is actually over 9X more effective (46% vs 5%).

This should give the industry pause for thought. If by not using the brand name you were only sacrificing 50% of claimed attribution, this can be rationalised by having a more elegant logo with more flexibility in usage. However when the actual impact is that actual attribution drops by almost 90%, there is a far more fundamental decision to be made.

As noted above, in visual brand communications the sonic logo is rarely used in isolation and is typically paired with a visual brand logo and that visual cue can help bridge this source amnesia - but on the basis that this is already happening with most brands we can only conclude that the effect is small. In audio only executions, or where the consumer has tuned out of the commercial, the sonic logo does have to stand on its own and this is where sonic logos without the brand name will fall short.

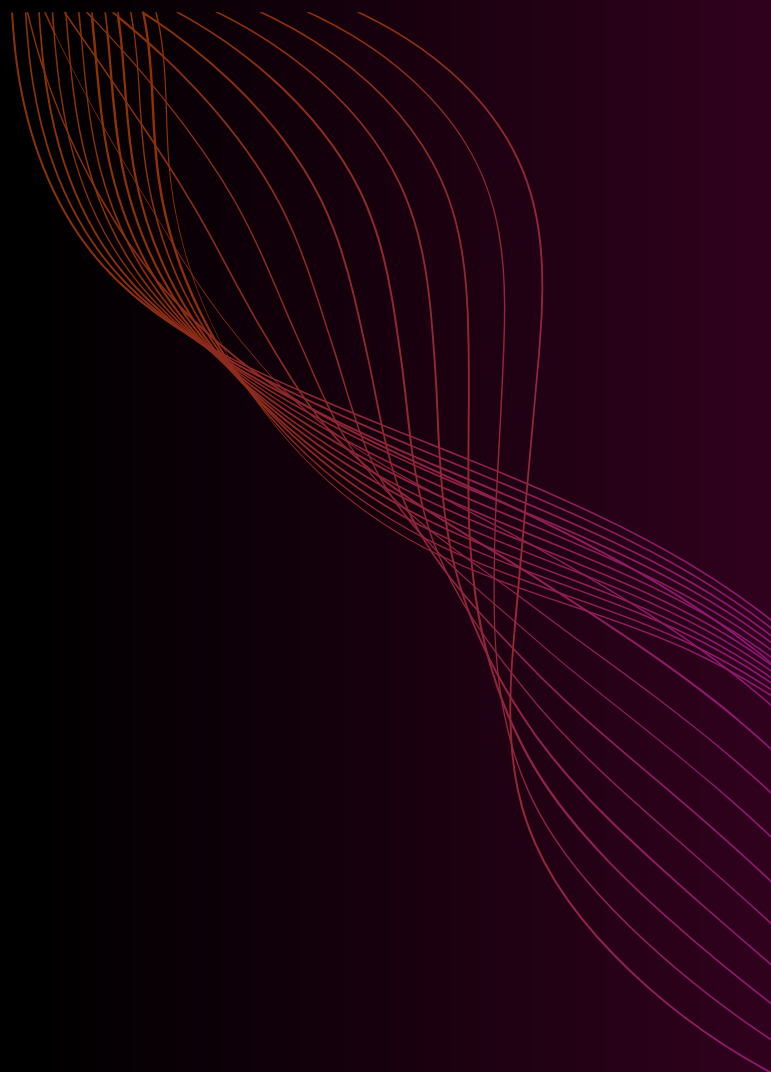
Conclusion

The data suggests that while many brands achieve sonic familiarity, only a subset succeed in embedding their identity into that auditory memory. The winners consistently:

- Use a distinctive, non-generic audio signature.
- Pair it with clear brand name or identifiers in every exposure.
- Maintain consistent deployment over time and across touchpoints.

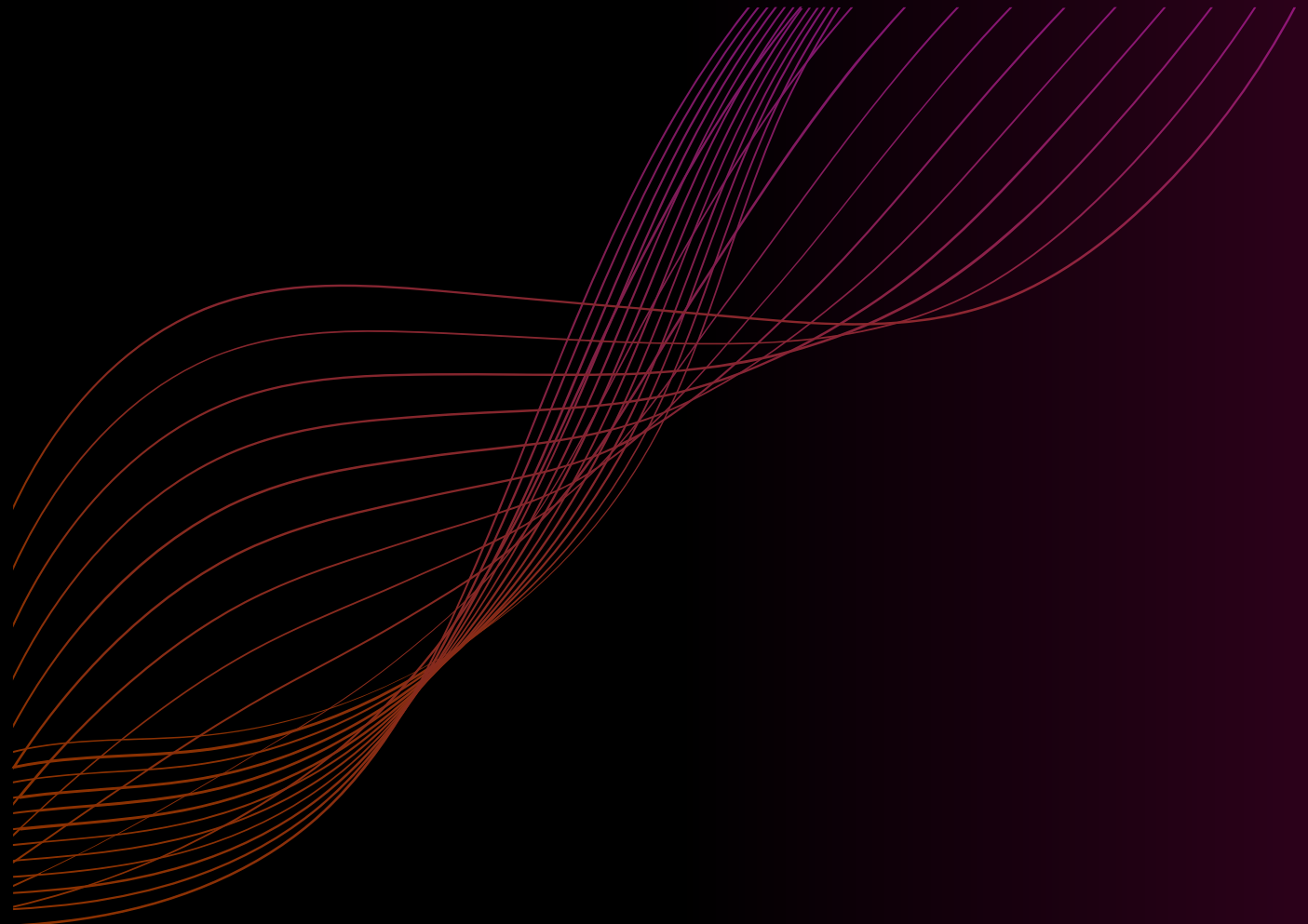
Without these conditions, your sonic branding risks becoming a pleasant but commercially impotent background cue.

Subtlety in marketing works best with premium brands, sophisticated audiences or trust based brands (e.g finance), but if you want to deliver impact in mass or crowded markets (e.g insurance) our advice would be to always include the brand name, or verbal cue in your sonic logo.





9. Fast-track hack to attribution



In previous SoundOut Index reports we have analysed the importance of emotional brand resonance, appeal, recall, melody, wave form and a host of other elements that combine to create a compelling, market ready sonic brand. This year we have also conducted further proprietary research around melodic and acoustic modelling and mapping sonic logos to brand attributes – this is included in Appendix 4 below.

However we believe that a truly powerful sonic strategy should preplan an evolution of the sonic logo to massively accelerate sonic attribution.

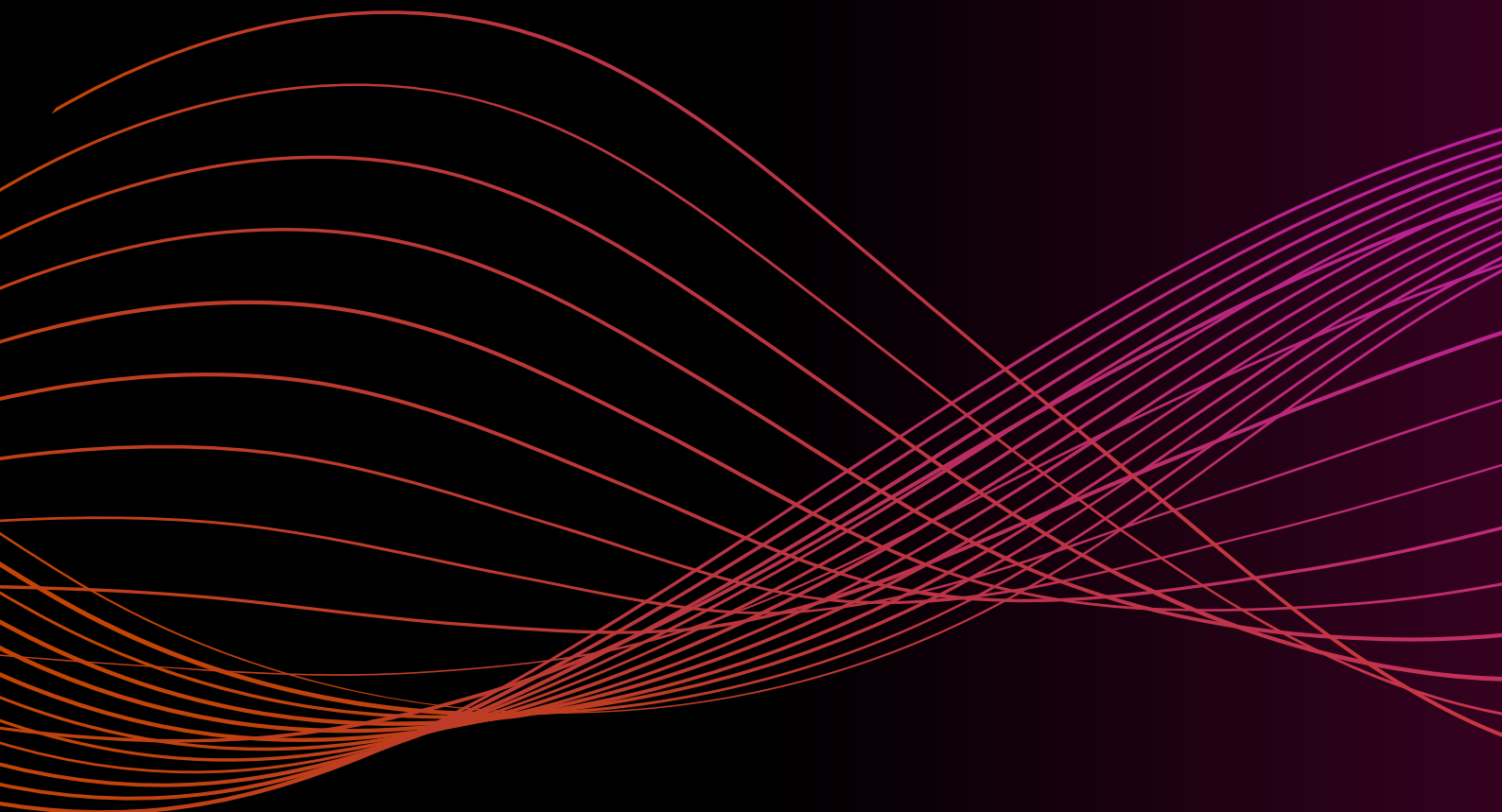
This is shamelessly stolen from the visual branding world – where designers have waited until a visual logo and written brand association is so seared into the consumer consciousness that the written brand name can ultimately be dropped from the logo without any meaningful drop in consumer recognition/brand association:



Our recommendation for any brand creating a new sonic logo would be to initially always include the brand name in the sonic logo, or at the very least develop two versions, one with the brand name and one without. Run with this as long as it takes to get to 50% actual consumer attribution and only then consider dropping the brand name and running with the melody version alone. This approach will shave years off the establishment of a sonic brand and, while it may offend purists, it is the fastest guaranteed cheat to bake in consumer memory associations and infuse your sonic logo with brand association.

This is nothing new, plenty of brands have started with sonic logos including the brand name or strapline and then dropped the vocals – eg Intel, McDonald's, Yahoo!, and AT&T. At the end of the day this is a strategic, rather than a creative decision. Creatives will almost always shy from including the brand name, but if your primary goal is to increase brand effectiveness there is only one route to choose.

10. The astonishing power of sonic branding: proven



In June 2025 a new 2 year research study from System1: **'The Long and the Short (form) of it 2025'** was published (involving almost 887 short form ads and 92,000 consumers)



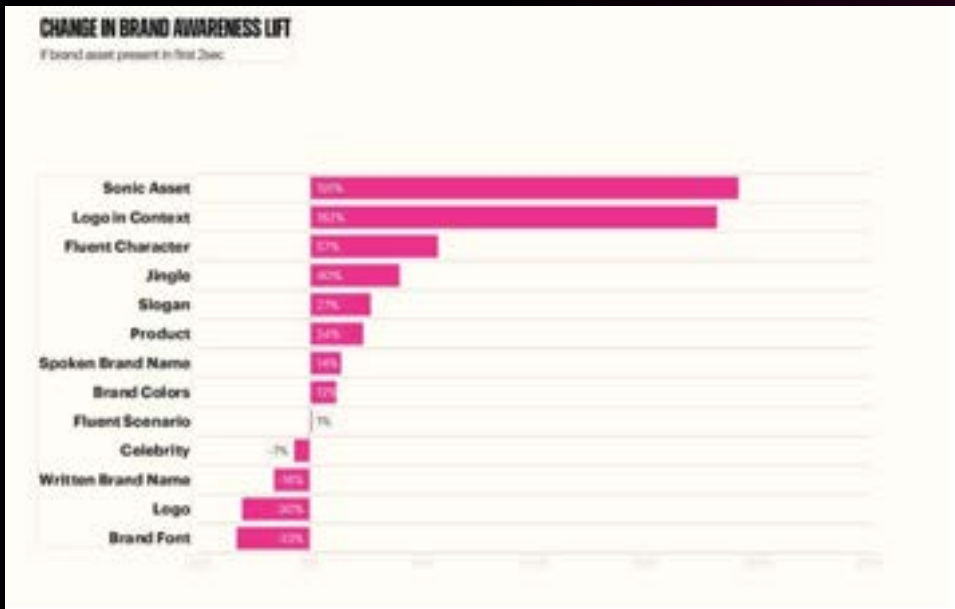
This study categorically proved that sonic assets are the most effective way to hook attention, drive brand recognition and maximise brand awareness

You can download the full study [here](#).

Highlights are as follows:

1. A 191% wake-up call for marketers

The study includes a killer chart that ranks the change in brand-awareness lift delivered by different assets when they appear in the first two seconds.



The runaway #1? Sonic assets (brand riffs, audio mnemonics and bespoke sonic logos) which turbo-charge awareness by an extraordinary 191%.

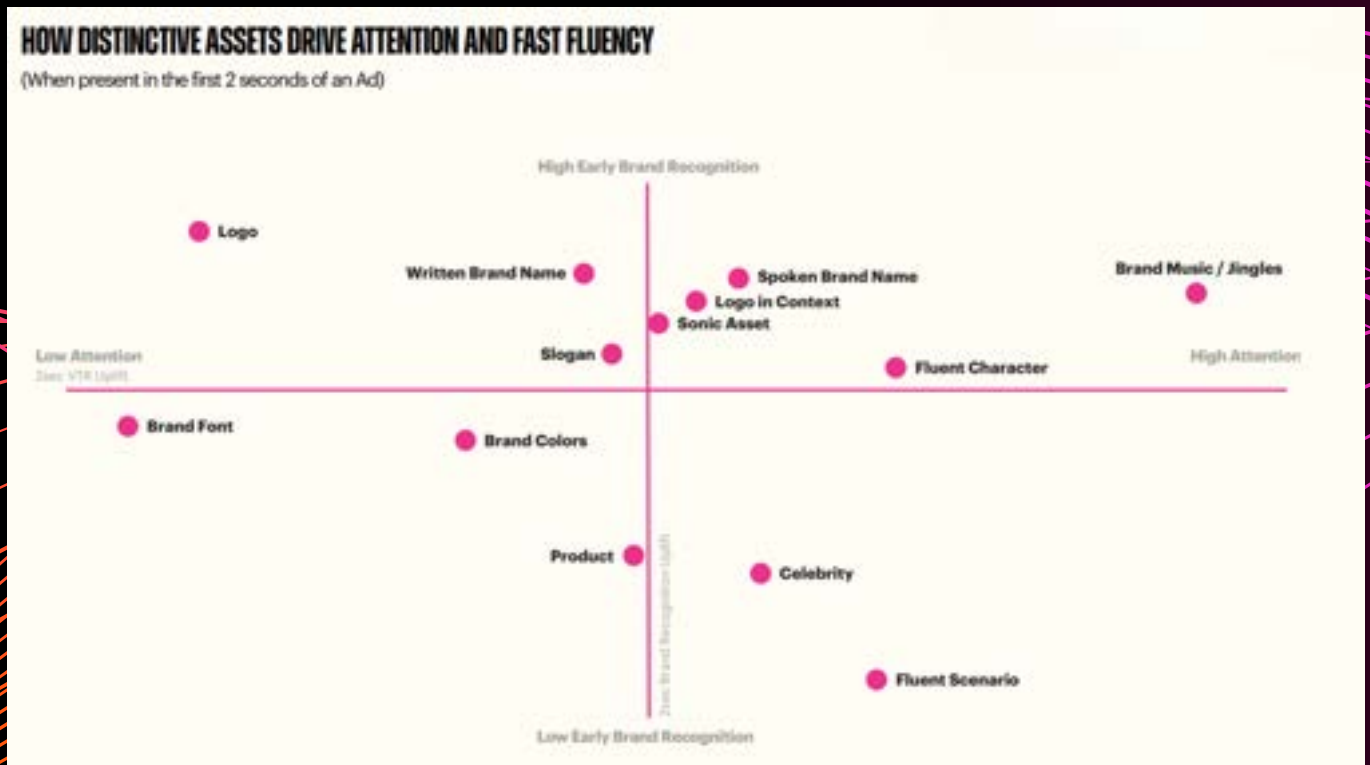
For context, that's more than five times the uplift delivered by simply throwing the written brand name on screen, and it even beats fluent characters (57%) and well-loved slogans (27%).



If you thought audio was just a “nice-to-have”, the data says otherwise: sound is the most potent way to lodge your brand in memory, fast.

2. Audio cues win the twin battle: attention and recognition

System1 plotted each asset type on a grid of attention (6-second view-through) versus Fast Fluency (2-second brand recognition). Sonic assets, alongside brand music/jingles, live in the coveted north-east quadrant: high stopping power and instant attribution.



Visual logos, by contrast, sit low on attention (audiences have learned to scroll past them), while still demanding visual real estate. Audio doesn't have that trade-off: listeners pick it up subconsciously even while their attention is elsewhere.

3. Early branding is no longer a tax on attention – when it's sonic

Another myth the study busts is that branding early hurts engagement. Ads with "exceptional early branding" actually lift memory (+88%), awareness (+92%) and image (+85%) without dampening attention or sentiment.

Because sonic cues can be woven underneath the action, they feel organic rather than obtrusive – as such they are the perfect vehicle for that crucial first-second imprint.

4. Ear-worms beat visual logos

When System1 isolated individual assets, jingles delivered a healthy 40% awareness lift, while a naked visual logo drove a 30% decline in attention (and zero positive lift).

In other words, the element many marketers still cling to, the static logo, is actively working against them in fast-scroll environments, whereas ear-worms pay compound interest.

5. Four is the magic number – and audio should be one of them

Upping the count of distinctive assets in the opening two seconds boosts recognition exponentially until it plateaus at four assets; beyond that, attention starts to erode.

Slotting your sonic logo beneath a visual signature, brand colour wash and on-screen character hits that sweet spot without overcrowding the frame or overwhelming the senses.

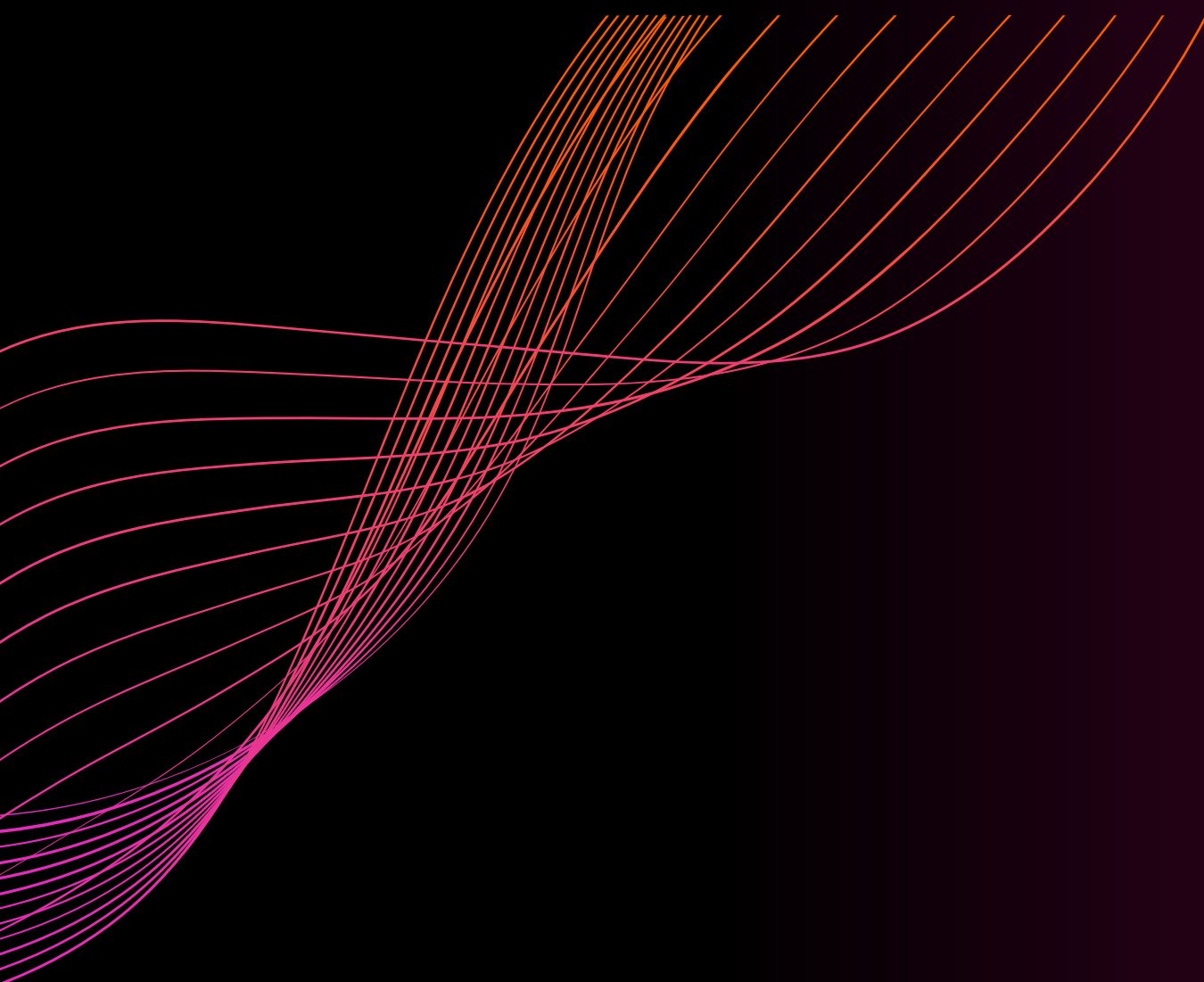
6. Entertainment + sound = full-funnel power

The study's broader takeaway is that entertaining creative builds the long-term brand and the short-term sale simultaneously (+39% memory lift, 2× awareness, 2.8× image). Sonic branding supercharges that entertainment value – think of the Pavlovian thrill when Netflix's "TUDUM" fires or the comfort of McDonald's "I'm Lovin' It".

7. The sound of success

Eyes can close, screens can scroll, but ears are always on. In an attention-scarce, skip-happy world, the brands winning tomorrow will be the ones audiences hear before they even realise they're watching.

While you may already have a sonic logo, you may not be using it to achieve maximum impact. The System1 study provides compelling and actionable insights on how to optimise its use.



11. When will brands embrace gen AI music?

No industry report in 2025 would be complete without a section on AI. In the sonic branding world (ie short form logos) AI has yet to make much of an impact. Sonic branding is rooted in the ability to elicit an emotional consumer response that resonates with the brand – and AI does not yet have the capabilities to do or measure this (trust us, we have tried). However if we look at sonic marketing more generally the distant drums of AI are beating much louder...

In the next 24 months AI will impact all aspects of marketing from ideation, content creation, personalisation, data analysis and market research. ⁶

It is inevitable that this will extend to the widespread use of AI music. Indeed, a recent major report from [Goldmedia](#) predicts that, within 3 years, 27% of current music creators revenues will be replaced by generative AI. ⁷

Why AI-Generated Music will be irresistible for Brands

If, for the moment, we ignore the unfortunate economic destruction this will mean for the music industry in general, and legions of artists in particular, the rationale for using AI music in marketing is compelling. If we assume a level playing field, ie that AI music will ultimately match the quality and appeal of human composed/performed music (remember that the AI music generated today will be the worst you will ever hear). The case for AI music in marketing is compelling, but, for a number of reasons, AI music adoption will be slower than expected:

- It is likely that AI will first be applied to the quick, higher value marketing wins (ideation, image and video creation, targeting etc) and music will then follow.
- AI will soon enable/is already enabling the complete automation of original content creation (including the music) – particularly for high volume, low cost social campaigns. For some, to separately adopt an AI music strategy may be superfluous for all but the largest campaigns.
- The perceived unresolved legal status of AI-generated music.

And it is this legal uncertainty that is perhaps creating the biggest pause. There has been widespread press coverage of the legality of AI music on the basis that the generative models that create it have been trained on music without the consent of the rights owners.

While Suno and Udio, the market leaders, are locked in a monumental case with the labels that should establish whether using copyrighted music to train models is permissible, the reality is that AI generated music is here to stay. There is no need to train models on copyrighted music, indeed Meta's MusicGen was trained on 400,000 properly licenced tracks (approx. 0.1% of the music currently in existence). AI does not need all the world's music to train, and quality trumps quantity every time in AI training. Perfectly good music Gen AI models can be trained on as little as 10,000 tracks – and, to put this in perspective, 100,000 new tracks a day are being uploaded to Spotify alone.

²⁸ [6] Forrester predicts that 70% of businesses will deploy AI in marketing within the next 12 months. The Digital Marketing Institute predicting that the AI in marketing size expected to grow to \$217 billion by 2034.

[7] /GEMA-SACEM_AI-and-Music/AI_and_Music_GEMA_SACEM_Goldmedia.pdf

As an aside, while I have immense sympathy for (and applaud) artists fighting the UK's proposed Copyright and Artificial Intelligence Act, whether they win or lose (or whether they all opt out) will not make a jot of difference to the rise and rise of AI music. There are plenty of publishers who are happy, for a small fee, to make their music available for AI model training. 99% of the world's artists can slam the door but the AI horse has already bolted. However inequitable, Artists (music and otherwise) are going to be largely disenfranchised by AI. Likewise software developers, accountants, lawyers, architects, almost all computer based admin jobs and factory workers (to name but a few). And there is nothing that any of us can do to prevent this.

Even today, brands need not be concerned about using AI generated music, even if the labels can show that the model training breached copyright, it is a giant leap to prove that the original compositions created by the models somehow plagiarise the training tracks. Just like humans, the models learn how to compose music from 'listening' to lots of other music, they do not copy what they have ingested. On this basis every human composer is as guilty as an AI model as they too have 'learnt' music composition from listening to music created by others.

But is AI music second rate and devoid of emotion?

The emotion, time and effort poured into the creation of a song is rarely reflected in the emotion and appreciation felt by the listener. Indeed most original music is mediocre regardless of the blood sweat and tears poured into its creation (and we have tested over 300,000 tracks with consumers). The fact that the artist has wrung themselves out emotionally to create a song does not make it either 'good' or valuable to consumers (similarly, almost everyone can kick a football but a miniscule minority will ever make a living from doing so).



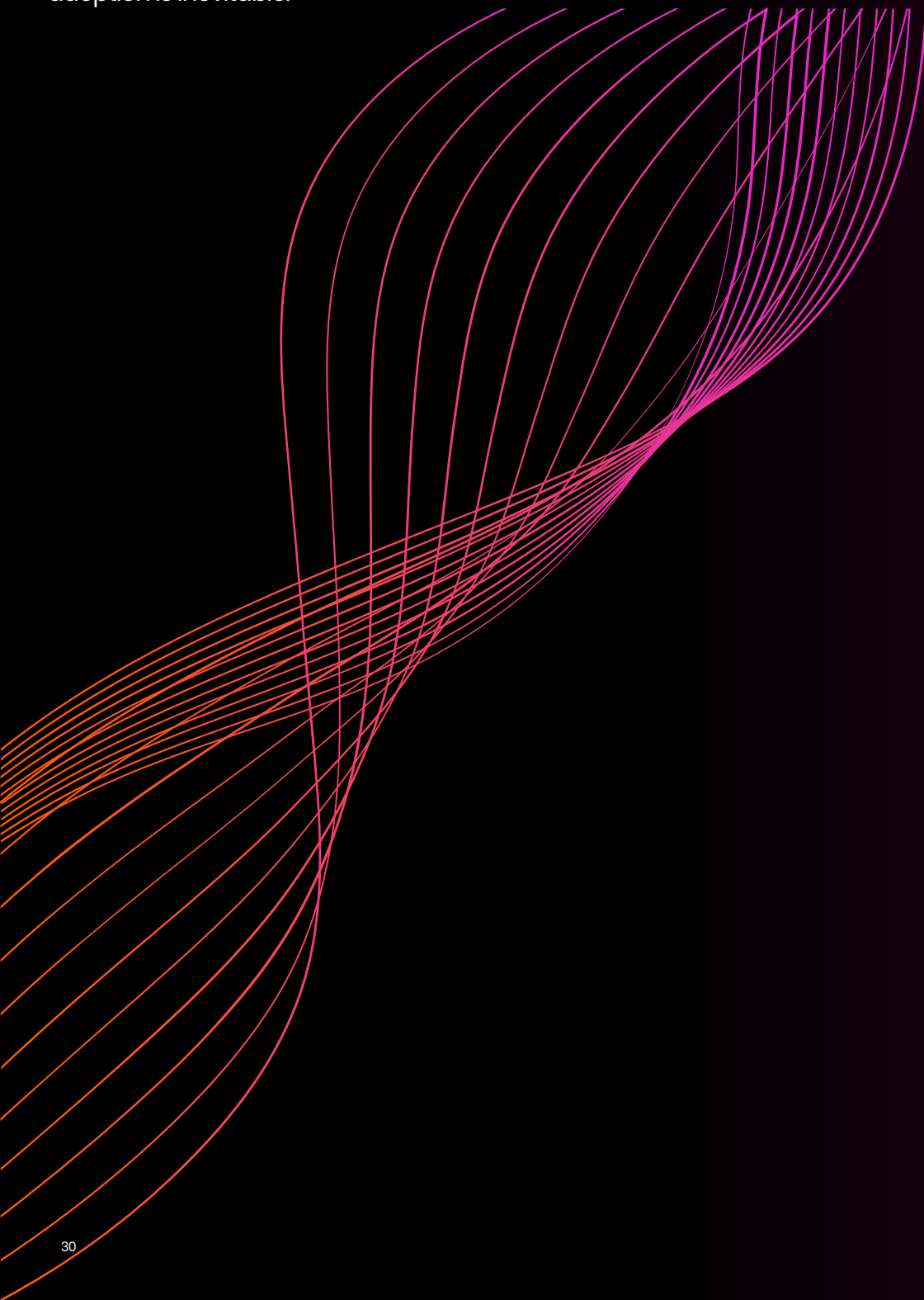
The value of a song rests on consumer resonance and the ability to trigger a meaningful emotional response. Of course this is sometimes impacted by a personal connection/adulation of the artist, but in marketing, 99% of the time, music is chosen for its intrinsic ability to communicate emotion, not on the artist who wrote or sang it.

Last year we conducted major studies (with Stephen Arnold Music) to answer this very question. The result – AI songs are often as good as, or better than human compositions, and while they are not yet that accurate at conveying the desired/instructed emotion, when blind reviewed by humans they have the ability to genuinely emotionally move the listener.

To wrap up

We are in the foothills of AI music creation and, as previously stated, the AI music you hear today is the worst you will ever hear. I have no doubt that, given a couple more years and a further dollop of VC capital, computers will soon reliably outperform human composers almost all of the time. Plug this into an iterative improvement loop with an emotional analysis OnBrand platform (or similar) and the ability of a brand to create an AI track with an entirely predictable human emotional response for commercial use will become the go to approach to music for a large percentage of campaigns.

Remember that brands do not 'like' music per se - they like music for the impact and emotional conditioning it can subconsciously elicit in a consumer. It is the response, not the cause that matters. When AI can demonstrably do this better, faster, cheaper and more effectively than humans, widespread adoption is inevitable.



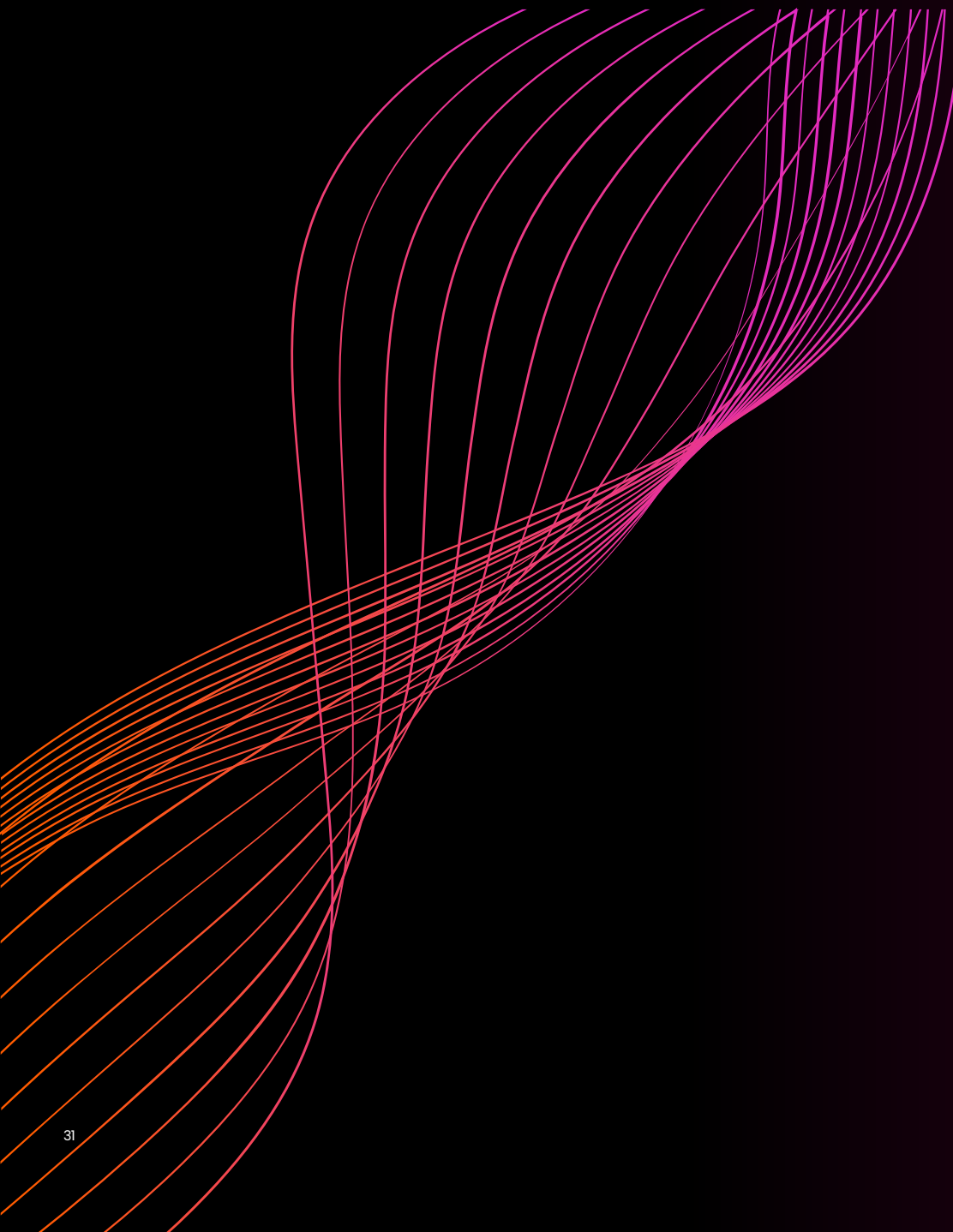
Appendix

Appendix 1 – Overall sonic branding rankings

Appendix 2 – The fastest growing brands 2023–2025

Appendix 3 – Example brand analysis – Mastercard

Appendix 4 – Using Melodic and Acoustic Modelling to Decode Brand Meaning in Sound



Appendix 1:

Overall sonic branding rankings

Appendix 1. Overall rankings



Brand	Name in logo	2025 Rank	Change 2023-25	Recognition	Attribution (claimed)	Attribution (actual)	BrandMatch
Arby's	Yes	1	2	86%	94%	86%	64%
Autozone	Yes	2	6	81%	93%	78%	85%
Liberty Mutual	Yes	3	-1	83%	91%	81%	66%
O'Reilly	Yes	4	1	80%	88%	72%	72%
Little Caesar's	No	4	12	82%	88%	74%	86%
Hot Pockets	Yes	6	-5	81%	87%	78%	79%
Green Giant	Yes	6	16	75%	87%	69%	92%
Ace Hardware	Yes	6	8	81%	87%	78%	57%
Red Robin	Yes	9	-5	75%	84%	69%	60%
Farmers	Yes	9	1	78%	84%	70%	83%
Klondike	Yes	11	-2	78%	83%	65%	84%
Folgers	Yes	11	4	76%	83%	74%	85%
Wayfair	Yes	13	NA	71%	82%	71%	84%
Goldfish	Yes	13	-7	73%	82%	78%	31%
Activia	Yes	13	18	70%	82%	74%	77%
Kay	Yes	16	-9	79%	81%	61%	84%
Febreze	Yes	16	1	75%	81%	69%	83%

Appendix 1. Overall rankings cont...



Brand	Name in logo	2025 Rank	Change 2023-25	Recognition	Attribution (claimed)	Attribution (actual)	BrandMatch
The General	Yes	18	0	75%	79%	60%	77%
Chili's	Yes	19	-7	68%	74%	64%	86%
Maybelline	yes	20	NA	66%	73%	66%	89%
USAA	Yes	21	2	64%	71%	69%	78%
Tums	Yes	21	3	72%	71%	64%	78%
Ricola	Yes	21	5	74%	71%	53%	86%
Netflix	No	21	-10	74%	71%	43%	86%
Nationwide	No	25	-6	71%	69%	43%	91%
Daisy	Yes	25	4	67%	69%	57%	90%
State Farm	No	27	-7	74%	68%	52%	90%
Pepsi	Yes	27	3	57%	68%	53%	86%
McDonald's	No	29	-4	68%	67%	53%	83%
Menards	Yes	30	3	57%	66%	57%	91%
PlayStation	Yes	31	-18	65%	65%	46%	87%
MGM	No	32	2	65%	61%	43%	67%
Avocados From Mexico	Yes	33	3	57%	58%	51%	90%
T-Mobile	No	34	-7	67%	57%	21%	75%
Old Spice	No	35	-7	73%	56%	23%	74%
³⁴ Taco Bell	No	36	-15	63%	55%	49%	79%
Haribo	Yes	37	0	60%	49%	29%	88%

Appendix 1. Overall rankings cont...



Brand	Name in logo	2025 Rank	Change 2023-25	Recognition	Attribution (claimed)	Attribution (actual)	BrandMatch
Allianz Global Investors	Yes	38	1	31%	48%	31%	88%
Tubi	yes	39	NA	49%	47%	28%	71%
Duracell	No	40	1	63%	46%	13%	67%
CBS Entertainment	No	41	10	61%	45%	10%	70%
Cricket wireless	No	42	-42	56%	43%	13%	86%
Philips	No	43	44	52%	42%	0%	84%
TikTok	No	44	-1	58%	41%	14%	82%
HBO	No	44	-2	54%	41%	22%	87%
NBC	No	46	4	55%	40%	26%	86%
Pillsbury	No	47	NA	49%	39%	28%	79%
Xbox One	No	48	-16	54%	38%	11%	84%
Chuck E. Cheese	No	48	-10	48%	38%	24%	89%
AT&T	No	48	-8	55%	38%	20%	84%
Hulu Original	No	51	4	50%	36%	0%	59%
Home Depot	No	52	-17	47%	35%	14%	83%
ESPN	No	52	-8	46%	35%	17%	85%
Chicken Tonight	Yes	52	-4	44%	35%	15%	64%
Flash	Yes	55	-8	39%	34%	33%	83%
Volkswagen	No	56	59	43%	32%	0%	71%
Visa	No	57	26	43%	31%	0%	76%

Appendix 1. Overall rankings cont...



Brand	Name in logo	2025 Rank	Change 2023-25	Recognition	Attribution (claimed)	Attribution (actual)	BrandMatch
Samsung	No	57	55	41%	31%	2%	89%
Honda	No	57	-4	47%	31%	0%	88%
Xiaomi	Yes	60	7	33%	30%	8%	80%
Pilsner Urquell	No	60	71	38%	30%	0%	85%
Paramount+	No	60	-4	49%	30%	3%	80%
Nissan	No	60	12	46%	30%	0%	84%
Showtime	No	64	30	42%	29%	0%	86%
PBS	No	64	30	44%	29%	0%	86%
Oreo	No	64	-6	47%	29%	0%	81%
LG	No	64	-10	46%	29%	1%	79%
Amazon Prime Originals	No	64	-15	48%	29%	5%	89%
Lexus	No	64	-64	43%	29%	0%	81%
Lipton	No	70	NA	37%	28%	1%	80%
Skyscanner	No	70	NA	41%	28%	0%	80%
Shell	No	70	35	41%	28%	0%	74%
Cinnamon toast crunch	Yes	73	NA	33%	27%	22%	56%
Nature Valley	No	73	NA	41%	27%	2%	61%
YouTube	No	73	-13	43%	27%	6%	88%
³⁶ TuneIn	Yes	73	-16	33%	27%	13%	86%
Sony	No	73	-4	40%	27%	1%	88%

Appendix 1. Overall rankings cont...



Brand	Name in logo	2025 Rank	Change 2023-25	Recognition	Attribution (claimed)	Attribution (actual)	BrandMatch
Pepsodent/Signal	No	73	49	39%	27%	0%	91%
Panera Bread	No	73	-9	42%	27%	0%	81%
Nintendo Switch	No	73	-3	34%	27%	5%	69%
Michelin	No	73	35	43%	27%	0%	75%
Legal & General	No	73	30	42%	27%	0%	71%
Abbott	No	83	NA	40%	26%	0%	85%
Advance AutoParts	Yes	83	NA	33%	26%	30%	68%
Atlassian	Yes	83	NA	39%	26%	0%	76%
Sprint	No	83	6	37%	26%	0%	84%
Bloomberg	No	83	42	37%	26%	0%	84%
AccuWeather	No	83	19	37%	26%	0%	81%
YouTube Originals	No	89	-37	42%	25%	0%	89%
Superbet	No	89	-21	37%	25%	0%	84%
AXA	No	89	41	37%	25%	0%	89%
Acast	No	89	18	40%	25%	0%	77%
Disney Now	No	89	-89	30%	25%	3%	80%
Abbvie	No	94	NA	36%	24%	0%	77%
Sanofi	No	94	NA	35%	24%	0%	85%
Uber	No	94	NA	37%	24%	0%	95%
³⁷ Wondery	No	94	NA	35%	24%	6%	84%

Appendix 1. Overall rankings cont...



Brand	Name in logo	2025 Rank	Change 2023-25	Recognition	Attribution (claimed)	Attribution (actual)	BrandMatch
Singapore Airlines	No	94	-19	39%	24%	0%	75%
UEFA Champions League	Yes	94	-33	34%	24%	4%	78%
Sonos	No	94	2	37%	24%	0%	81%
Peacock	No	94	14	36%	24%	2%	90%
Nvidia GeForce	No	94	33	36%	24%	0%	39%
Deloitte	no	94	-15	36%	24%	0%	88%
Cooper Tyres	Yes	94	-10	33%	24%	14%	87%
Campbell's Soup	No	94	19	37%	24%	0%	79%
Burger King	No	106	NA	36%	23%	3%	67%
Intel	No	106	NA	40%	23%	2%	89%
Invisalign	No	106	NA	33%	23%	0%	89%
Rockstar	No	106	NA	34%	23%	0%	88%
TD Bank	no	106	NA	35%	23%	0%	86%
USA Today	No	106	-28	40%	23%	0%	87%
Huggies	No	106	-47	36%	23%	11%	76%
Clorox	No	106	-32	35%	23%	0%	46%
Apple TV+	No	106	23	33%	23%	4%	62%
American Express	No	106	-43	37%	23%	0%	80%
Badoo	yes	116	NA	33%	22%	0%	84%
³⁸ Standard Chartered	no	116	NA	34%	22%	0%	69%

Appendix 1. Overall rankings cont...



Brand	Name in logo	2025 Rank	Change 2023-25	Recognition	Attribution (claimed)	Attribution (actual)	BrandMatch
Traeger	No	116	NA	35%	22%	0%	87%
Vuse	Yes	116	-43	34%	22%	1%	84%
Voices	Yes	116	-24	33%	22%	17%	80%
Chevron	No	116	-23	38%	22%	0%	82%
Cadbury	No	116	9	36%	22%	0%	88%
Barbie	No	116	-116	32%	22%	12%	88%
Envato	no	124	NA	33%	21%	0%	86%
Pandora	Yes	124	NA	35%	21%	1%	88%
PWC	No	124	NA	34%	21%	0%	87%
TD Ameritrade	No	124	-33	39%	21%	0%	86%
TCL	No	124	-44	36%	21%	0%	84%
Southwest Airlines	No	124	-6	36%	21%	1%	84%
Lays	No	124	-62	34%	21%	5%	89%
Florida24	No	124	-36	37%	21%	0%	87%
Finastra	No	124	-47	37%	21%	0%	63%
ESL	No	124	-38	38%	21%	0%	79%
Disney+	No	124	-79	41%	21%	3%	61%
Colgate	No	124	-59	42%	21%	2%	58%
³⁹ Aircall	No	136	NA	35%	20%	0%	85%
Zurich Insurance	No	136	-13	33%	20%	0%	74%

Appendix 1. Overall rankings cont...

Brand	Name in logo	2025 Rank	Change 2023-25	Recognition	Attribution (claimed)	Attribution (actual)	BrandMatch
Mastercard	No	136	-56	33%	20%	0%	44%
BMW	No	136	-30	35%	20%	0%	84%
Audible	No	136	-36	30%	20%	0%	79%
Audi	No	136	-19	31%	20%	2%	85%
Corona	No	142	NA	33%	19%	1%	47%
Gushers	No	142	NA	30%	19%	0%	88%
Snapdragon	No	142	NA	36%	19%	0%	79%
Tim Hortons	No	142	NA	34%	19%	0%	87%
Zocdoc	No	142	NA	32%	19%	0%	87%
WETA	No	142	-71	37%	19%	0%	83%
Kraft Mac & Cheese	No	142	-66	37%	19%	0%	91%
Hyundai	No	142	-18	36%	19%	0%	89%
Hayu	No	142	-57	38%	19%	0%	90%
Gymshark	No	142	-22	31%	19%	0%	66%
Gillette	No	142	-26	34%	19%	1%	76%
Ford	No	142	-23	31%	19%	4%	90%
Dove Men+Care	No	142	-28	31%	19%	0%	69%
Cadence Bank	No	142	-44	33%	19%	0%	68%
Aldi	No	142	-77	30%	19%	0%	83%
Amazon Music	No	157	NA	30%	18%	1%	84%

Appendix 1. Overall rankings cont...



Brand	Name in logo	2025 Rank	Change 2023-25	Recognition	Attribution (claimed)	Attribution (actual)	BrandMatch
USBank	No	157	-68	37%	18%	0%	88%
Porsche	No	157	-29	33%	18%	0%	85%
HSBC	No	157	-46	35%	18%	0%	88%
Emerson	No	157	-56	33%	18%	0%	90%
Fruit Roll Ups	No	162	NA	29%	17%	0%	84%
Infiniti	No	162	NA	33%	17%	0%	68%
Navy Federal Credit Union	No	162	NA	32%	17%	0%	80%
Wells Fargo	No	162	-41	36%	17%	0%	87%
Travelers	No	162	-63	33%	17%	0%	42%
Coca-Cola	No	167	-121	39%	16%	0%	77%
Fruit By The Foot	No	168	NA	27%	15%	0%	40%
Old El Paso	No	168	NA	31%	15%	0%	93%
Imodium	No	168	-58	33%	15%	0%	89%
Etihad	No	168	-86	32%	15%	1%	82%
Muller	no	172	NA	31%	13%	0%	61%
Leapfrog	No	172	-69	33%	13%	1%	89%
Tostitos	No	174	-77	30%	12%	0%	89%

Appendix 2:

The fastest growing brands 2023- 2025

Appendix 2 – Top fastest growing sonic brands



Brand	2023	2025	Growth 2023-25	Rank change 23-25	Name in logo
Philips	14%	42%	28%	48	No
Pilsner Urquell	5%	30%	25%	76	No
Activia	60%	82%	22%	18	Yes
Volkswagen	10%	32%	22%	64	No
CBS Entertainment	24%	45%	21%	13	No
Samsung	11%	31%	20%	60	No
AXA	5%	25%	20%	54	No
Pepsodent/Signal	9%	27%	18%	57	No
Bloomberg	8%	26%	18%	52	No
Visa	14%	31%	17%	31	No
Shell	11%	28%	17%	41	No
PBS	13%	29%	16%	35	No
Showtime	13%	29%	16%	35	No
Nvidia GeForce	8%	24%	16%	47	No
Hulu Original	20%	36%	16%	9	No
Apple TV+	7%	23%	16%	41	No
Michelin	11%	27%	16%	43	No
NBC	24%	40%	16%	8	No
Legal & General	11%	27%	16%	38	No
Green Giant	73%	87%	14%	16	Yes
AccuWeather	12%	26%	14%	29	No
Nissan	16%	30%	14%	17	No
Cadbury	8%	22%	14%	32	No
Acast	11%	25%	14%	31	No
Campbell's Soup	10%	24%	14%	33	No

Appendix 2 – Fastest growing sonic brands



Xiaomi	17%	30%	13%	12	Yes
Peacock	11%	24%	13%	28	No
Sprint	13%	26%	13%	16	No
Menards	53%	66%	13%	5	Yes
Avocados From Mexico	46%	58%	12%	5	Yes
Zurich Insurance	8%	20%	12%	17	No
Southwest Airlines	9%	21%	12%	21	No
Sonos	12%	24%	12%	16	No
Hyundai	8%	19%	11%	13	No
Nintendo Switch	16%	27%	11%	5	No
Paramount+	19%	30%	11%	1	No
Sony	16%	27%	11%	4	No
Oreo	18%	29%	11%	-1	No
Porsche	7%	18%	11%	7	No
Audi	9%	20%	11%	11	No
Little Caesar's	78%	88%	10%	12	No
Panera Bread	17%	27%	10%	-1	No
Gymshark	9%	19%	10%	9	No
Cooper Tyres	14%	24%	10%	4	Yes
YouTube	17%	27%	10%	-5	No
Honda	21%	31%	10%	1	No
Ford	9%	19%	10%	8	No
Deloitte	15%	24%	9%	-1	no
Daisy	60%	69%	9%	6	Yes
Gillette	10%	19%	9%	5	No
⁴⁴ Chevron	13%	22%	9%	0	No

Appendix 2 – Fastest growing sonic brands



Voices	13%	22%	9%	-1	Yes
Superbet	16%	25%	9%	-8	No
Singapore Airlines	15%	24%	9%	-5	No
MGM	52%	61%	9%	4	No
Chicken Tonight	26%	35%	9%	1	Yes
Dove Men+Care	10%	19%	9%	3	No
BMW	11%	20%	9%	0	No
Wells Fargo	9%	17%	8%	-4	No
TuneIn	19%	27%	8%	-8	Yes
Duracell	38%	46%	8%	4	No
Audible	12%	20%	8%	-6	No
Pepsi	60%	68%	8%	5	Yes
LG	21%	29%	8%	-5	No
USA Today	15%	23%	8%	-10	No
TD Ameritrade	13%	21%	8%	-6	No
Clorox	15%	23%	8%	-14	No
Florida24	13%	21%	8%	-9	No
TikTok	34%	41%	7%	3	No
HSBC	11%	18%	7%	-10	No
HBO	34%	41%	7%	2	No
ESL	14%	21%	7%	-11	No
Ace Hardware	80%	87%	7%	8	Yes
Cadence Bank	12%	19%	7%	-13	No
UEFA Champions League	17%	24%	7%	-19	Yes
Vuse	15%	22%	7%	-20	Yes
TCL	14%	21%	7%	-17	No

Appendix 2 – Fastest growing sonic brands



Flash	28%	34%	6%	-3	Yes
Emerson	12%	18%	6%	-20	No
Autozone	87%	93%	6%	6	Yes
Finastra	15%	21%	6%	-20	No
American Express	17%	23%	6%	-25	No
Huggies	17%	23%	6%	-29	No
Mastercard	14%	20%	6%	-26	No
Allianz Global Investors	43%	48%	5%	3	Yes
Travelers	12%	17%	5%	-26	No
Hayu	14%	19%	5%	-26	No
ESPN	30%	35%	5%	-3	No
USBank	13%	18%	5%	-32	No
Colgate	17%	21%	4%	-32	No
Haribo	45%	49%	4%	2	Yes
Imodium	11%	15%	4%	-18	No
Folgers	79%	83%	4%	4	Yes
Kraft Mac & Cheese	15%	19%	4%	-35	No
Ricola	67%	71%	4%	7	Yes
Lays	17%	21%	4%	-35	No
Amazon Prime Originals	25%	29%	4%	-10	No
Febreze	77%	81%	4%	2	Yes
YouTube Originals	21%	25%	4%	-24	No
WETA	16%	19%	3%	-40	No
The General	77%	79%	2%	1	Yes
⁴⁶ Arby's	92%	94%	2%	2	Yes
Aldi	17%	19%	2%	-46	No

Appendix 2 – Fastest growing sonic brands



Farmers	82%	84%	2%	1	Yes
Tums	69%	71%	2%	5	Yes
Leapfrog	11%	13%	2%	-27	No
Etihad	14%	15%	1%	-46	No
Klondike	82%	83%	1%	-2	Yes
AT&T	38%	38%	0%	-3	No
Tostitos	12%	12%	0%	-34	No
McDonald's	68%	67%	-1%	-2	No
USAA	72%	71%	-1%	4	Yes
O'Reilly	90%	88%	-2%	1	Yes
Liberty Mutual	94%	91%	-3%	-1	Yes
Old Spice	62%	56%	-6%	-5	No
T-Mobile	63%	57%	-6%	-5	No
Chuck E. Cheese	44%	38%	-6%	-5	No
Nationwide	75%	69%	-6%	-4	No
Goldfish	89%	82%	-7%	-7	Yes
Chili's	81%	74%	-7%	-6	Yes
State Farm	75%	68%	-7%	-5	No
Red Robin	91%	84%	-7%	-5	Yes
Kay	89%	81%	-8%	-8	Yes
Disney+	29%	21%	-8%	-52	No
Hot Pockets	95%	87%	-8%	-5	Yes
Netflix	81%	71%	-10%	-8	No
Coca-Cola	29%	16%	-13%	-81	No
Home Depot	49%	35%	-14%	-12	No
PlayStation	80%	65%	-15%	-16	Yes
Taco Bell	73%	55%	-18%	-13	No
Xbox One	56%	38%	-18%	-11	No

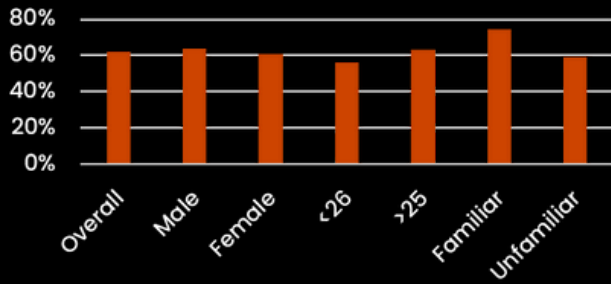
Appendix 3

Example brand analysis – Mastercard

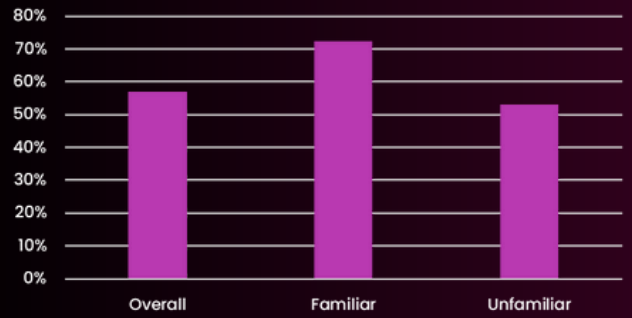
3. Example sonic brand analysis – Mastercard

Just some of the data we have on every sonic logo in this report...

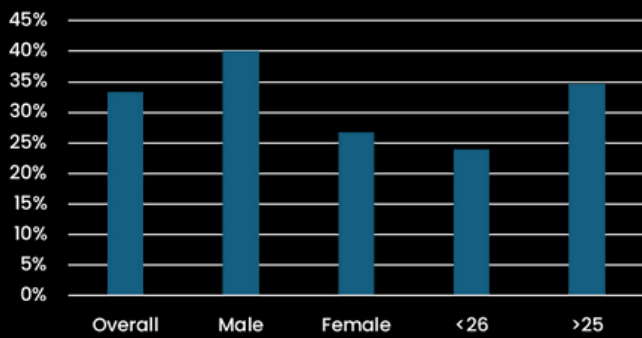
Appeal



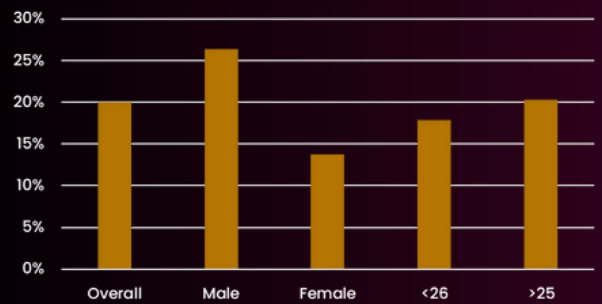
Distinctiveness



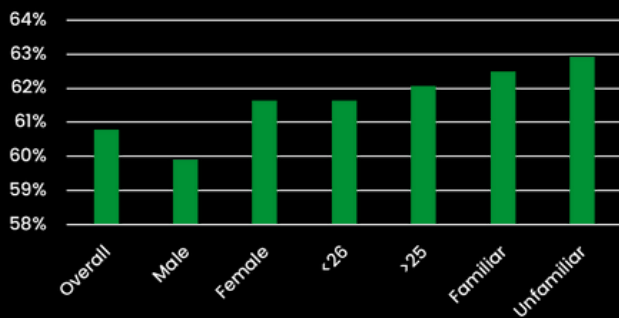
Recognition



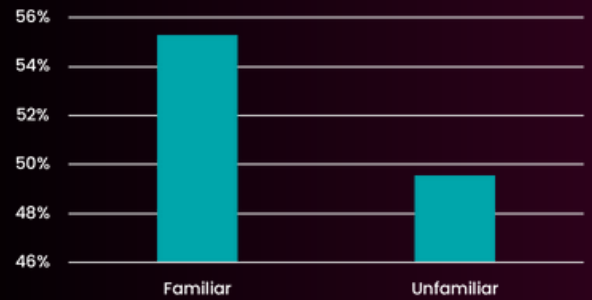
Claimed Attribution



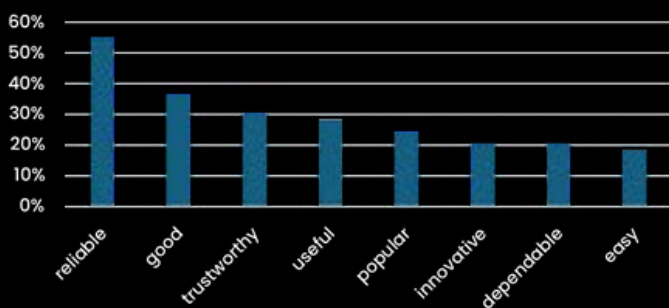
Recall



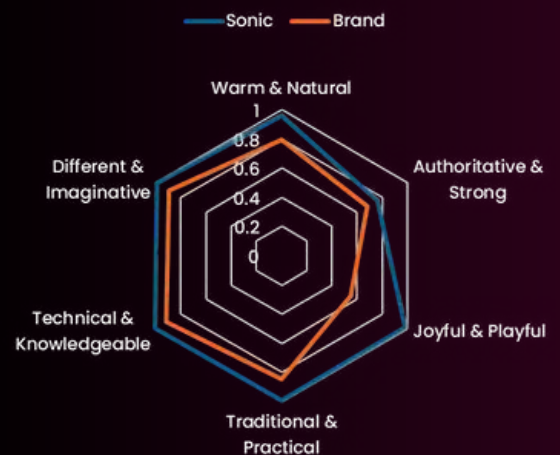
Propensity to buy



Free text responses



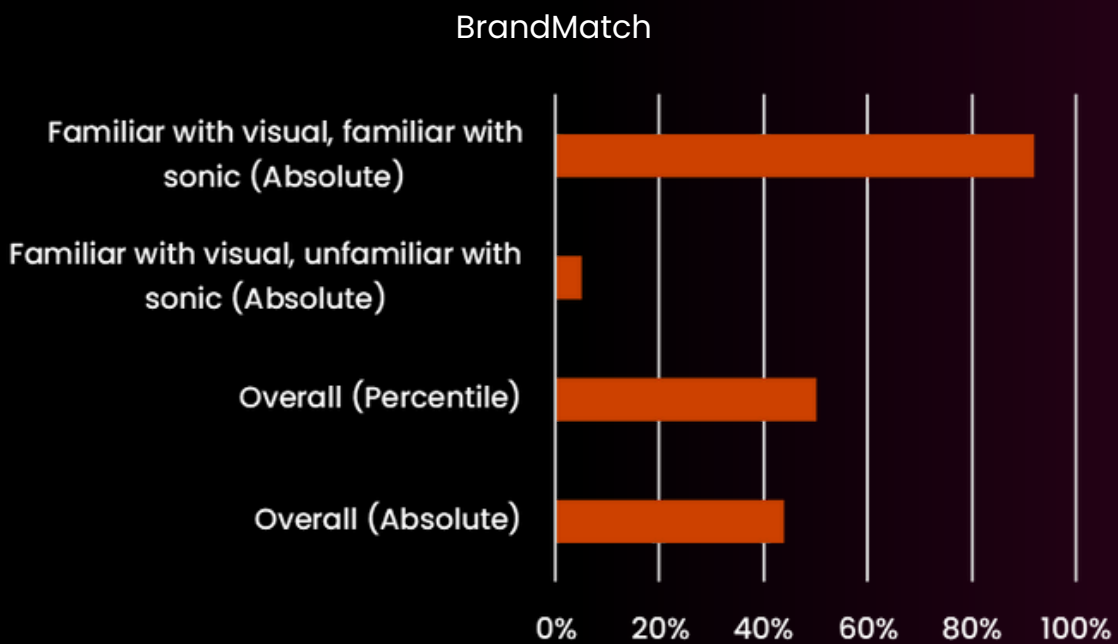
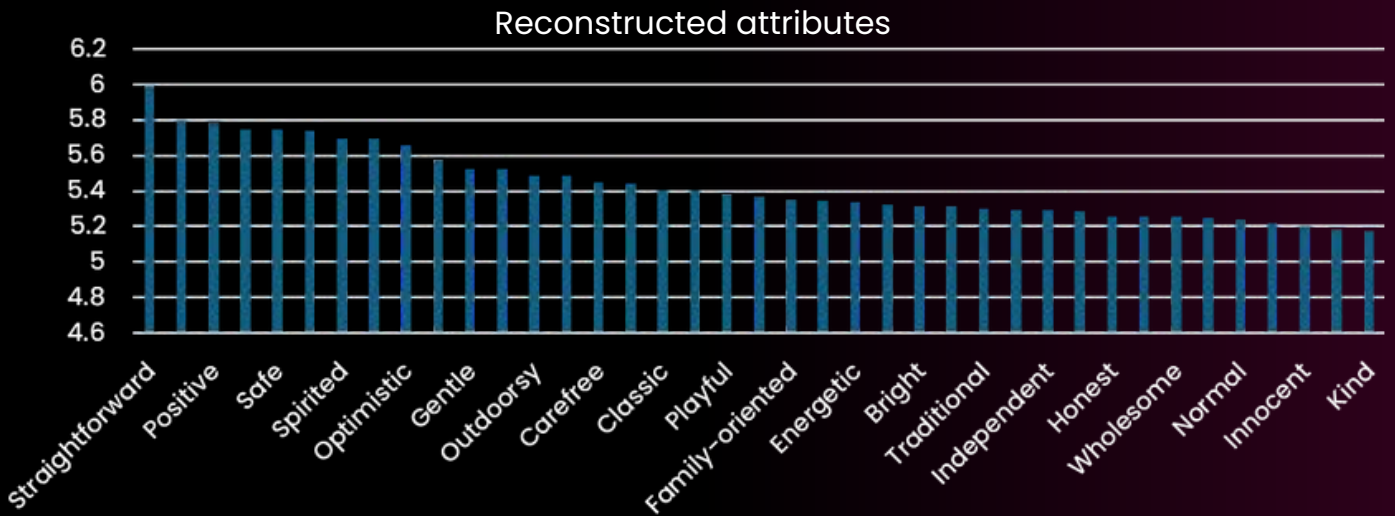
BrandMatch





Mastercard

Example results
Plus thousands of written
verbatim comments





OnBrand Insight™

See Your Brand Through the World's Eyes

Top 8 Aspirational Attributes

The 8 key attributes this brand most wants to communicate and represent

Innovative

Trustworthy

Inclusive

Empowering

Visionary

Dynamic

Welcoming

Optimistic

Showing 8 aspirational attributes

Brand Aspiration Insights

Mastercard's communication consistently emphasizes innovation and forward thinking, positioning the brand as a visionary leader in the payments and technology space.

Trust and inclusivity are central to Mastercard's personality, with frequent messaging around security, global reach, and financial inclusion.

The brand balances sophistication and technical expertise with warmth and approachability, aiming to make technology accessible and human-centered.

Mastercard strives to empower individuals and businesses, highlighting its role in enabling greater experiences and connections.

While the brand is confident and dynamic, it avoids a rebellious or defiant tone, instead focusing on optimism, empowerment, and positive global impact.

Innovative 83%

Consumer perception vs brand aspiration

Trustworthy 78%

Consumer perception vs brand aspiration

Inclusive 68%

Consumer perception vs brand aspiration

Empowering 68%

Consumer perception vs brand aspiration

Visionary 74%

Consumer perception vs brand aspiration

Dynamic 70%

Consumer perception vs brand aspiration

Welcoming 65%

Consumer perception vs brand aspiration

Optimistic 65%

Consumer perception vs brand aspiration

Competitive Landscape

Identify the direct competitors for Mastercard in the market

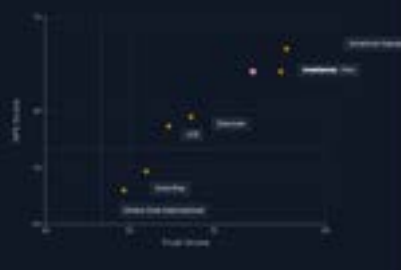


Trust vs NPS Competitive Positioning

Compare Mastercard against competitors based on Trust and NPS scores

Brand Scores

Brand	Trust	NPS
Mastercard	71	48
American Express	85	70
Visa	71	48
Discover	61	31
Chase	51	12
Wells Fargo	58	15
Bank of America	51	12



Mastercard's Aspirational Attributes - Consumer Reality Check

How well consumers believe Mastercard delivers on each aspirational attribute

Reality Gap by Attribute



Brand Reality Gap Analysis

Mastercard is successfully delivering on 4 of its core aspirational attributes. Consumers strongly recognize the brand as trustworthy, trustworthy, including effective brand positioning and messaging in these areas. The brand shows moderate success with inclusive, empowering, visionary, dynamic, welcoming, optimistic, inspiring, even by incorporating through enhanced marketing focus and consumer brand equity optimization. Mastercard should invest more in its aspirational delivery with clear opportunities to strengthen consumer perception alignment.

Trust & Recommendation



Consumer Sentiment Summary

Top Strengths

Technical expertise

Global reliability

Key Challenges

Perception of high fees

Limited search/human touch

Appendix 4:

Using Melodic and Acoustic Modelling to Decode Brand Meaning in Sound

By analysing hundreds of sonic logos through melodic and timbral modelling, this report uncovers the acoustic drivers behind brand perception and introduces a new strategic blueprint for sonic branding.

Executive Summary

Sound is a powerful driver of brand meaning. Sonic logos – those brief audio signatures of a brand – must encapsulate complex emotional and identity cues in just a few seconds.

Current AI tagging of music currently focuses on long-form music tracks which are not ideal for analysing short sonic logos.

To solve this issue, we applied new dual melodic and timbral feature extraction methods with Multiple Factor Analysis to link measured acoustic (timbre, loudness, brightness) and melodic (tempo, contour, tonality, rhythm) features to brand attributes (e.g. Bold, Confident, Peaceful, Sophisticated).

Key findings:

- Sonic logos naturally cluster into three archetypes: The Harmonisers, The Upsetters, and The Jesters.
- Attributes occupy distinct positions in the melodic-acoustic space, with clear acoustic-melodic drivers.
- Marketers and composers can use these insights to design logos more strategically: e.g. Confident logos benefit from strong tonal clarity, Fun-loving from rhythmic syncopation, Peaceful from sustained harmonics.

Background

Brands increasingly invest in sonic identities to build recognition and emotional connection. Yet, until now, sonic logo design has been largely intuitive and subjective.

By systematically analysing melodic and acoustic features across a global database of sonic logos, and mapping them against brand attribute ratings, we can provide marketers with a data-driven blueprint for sound design.

Method Overview

- Dataset: Hundreds of sonic logos scored by thousands listeners on 14 core brand attributes that map to 240 others within the SoundOut BrandMatch framework.
- Features: Around 100 melodic & acoustic descriptors (e.g. tempo, amplitude variance, spectral centroid).
- Model: Multiple Factor Analysis integrates attributes, assets and melodic-acoustic features into a shared perceptual space.
- Visualisations: 2D maps of assets, clusters, and attribute loadings; feature arrows indicating acoustic-melodic drivers.

Key Findings

Key Finding #1: Sonic Logos Cluster into Archetypes; and
Key Finding #2: Brand Attributes Occupy Distinct Regions of those archetypes

Interpretation:

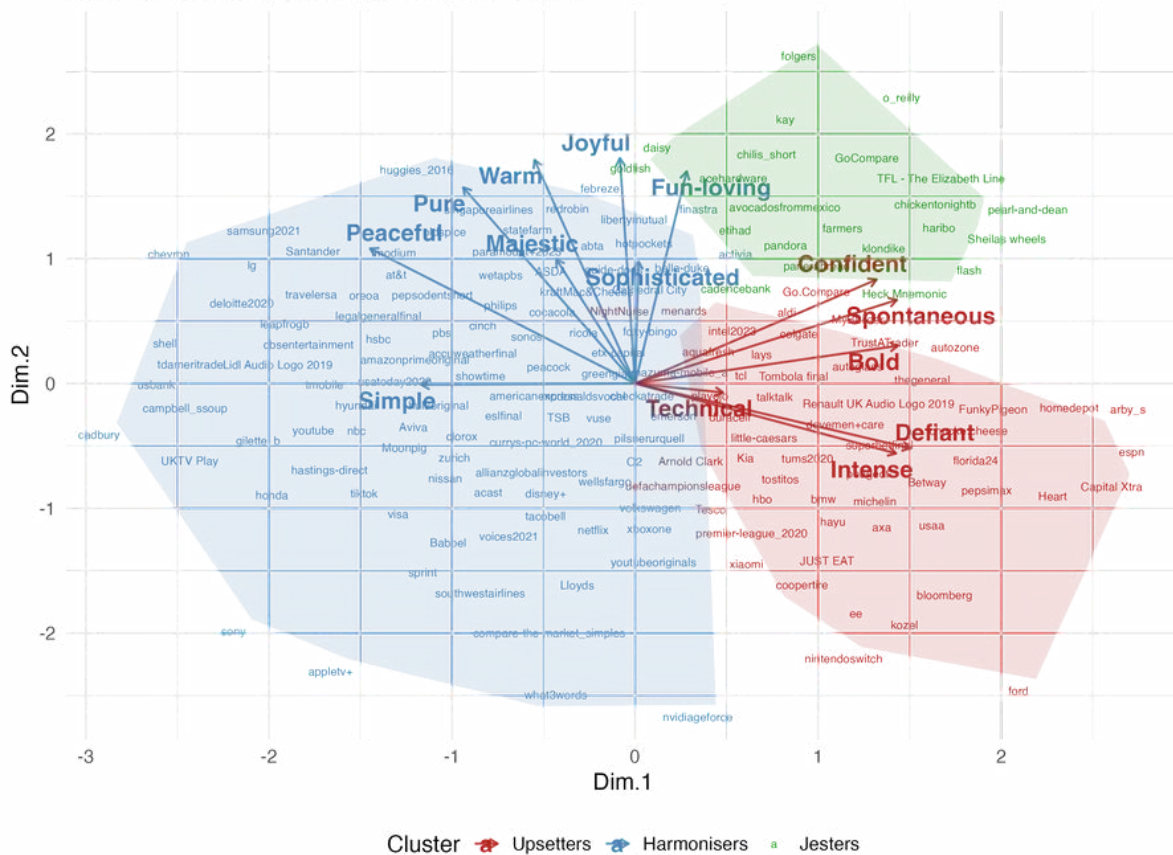
Upsetters (red): Bold, high-arousal, disruptive – looks like ESPM and The General.

Harmonisers (blue): Balanced, warm, soothing. – logos like Samsung and Huggies.

Jesters (green): Playful, catchy, mnemonic – logos like Kay, Chili's, Avocados From Mexico.

MFA Assets + Attributes

Assets (3 sub-families) vs Attributes (2 archetypes)



Interpretation:

Multiple Factor and Cluster Analyses reveals three distinct archetypes of sonic logos.

- **Harmonisers (blue)**: Logos that are smooth, tonal, and warm. They create reassurance, balance, and elegance.
- **Upsetters (red)**: Logos that are bold, disruptive, and high-energy. They break rules and grab attention.
- **Jesters (green)**: Logos that are playful, mnemonic, and sing-song. They are designed for memorability and entertainment rather than subtlety.

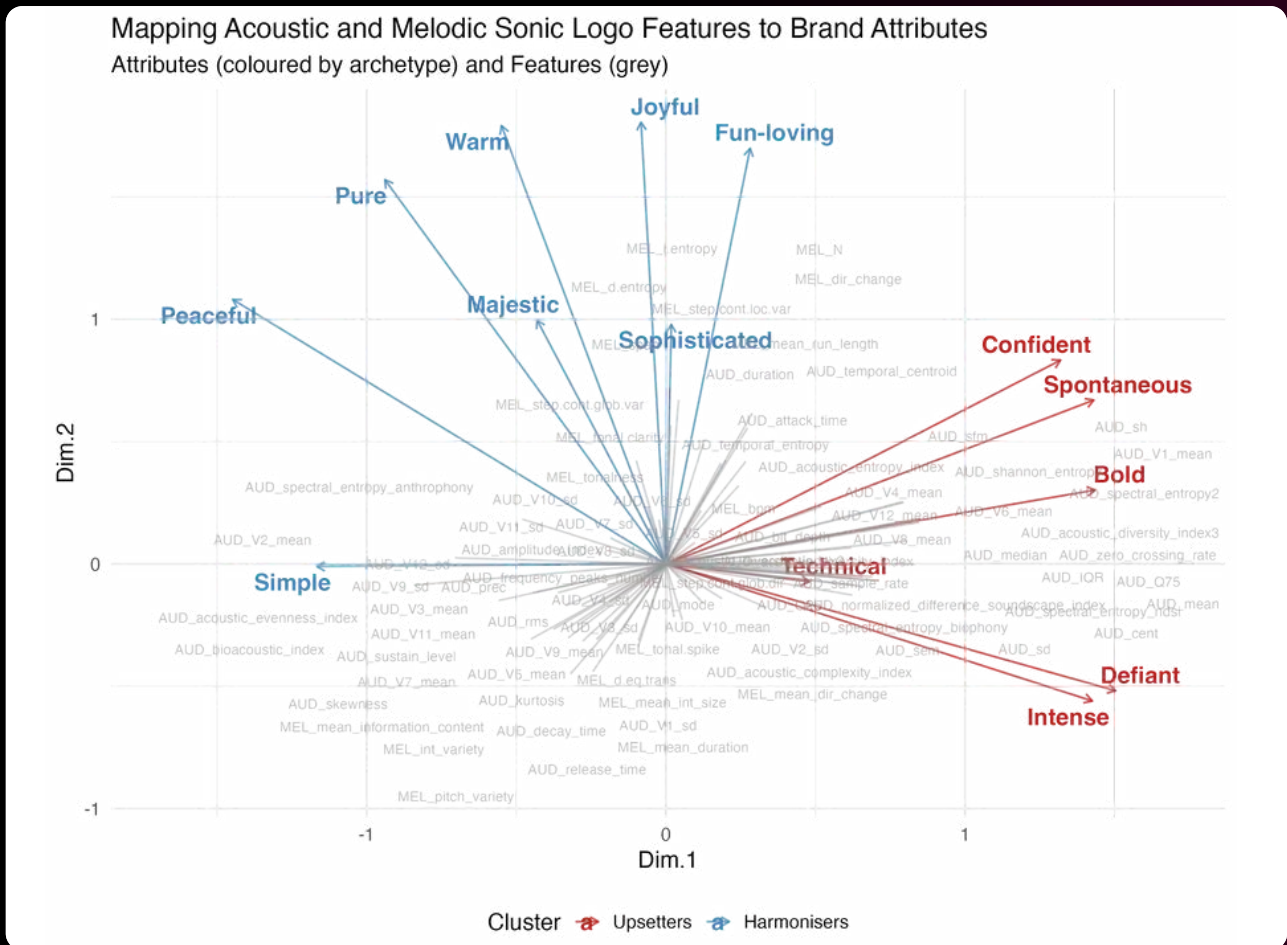
This demonstrates that brands tend to converge on a limited set of sound strategies, each aligned to different consumer promises.

When brand attributes are mapped into multiple factor analysis space, they group into two higher-order families:

- Harmoniser attributes: Peaceful, Warm, Pure, Sophisticated — values that emphasise comfort, reassurance, and refinement.
- Upsetter attributes: Bold, Defiant, Intense, Spontaneous — values that emphasise challenge, energy, and disruption.

The attributes extend outward as vectors, showing the acoustic directions that make a logo feel more Peaceful vs. Bold, or more Confident vs. Defiant. This provides marketers with clear design levers for moving logos along desired perceptual axes.

Key Finding #3: Acoustic and Melodic Drivers Explain Attribute Meaning



Interpretation:

By including both features (grey) and attributes (blue/red), multiple factor analysis reveals the acoustic mechanics behind brand meaning:

- Confident logos align with slower tempos and harmonic clarity.
- Peaceful logos are explained by low temporal entropy (stable, sustained sounds).
- Bold logos align with irregular rhythms and percussive peaks.
- Fun-loving logos emerge from syncopation and tonal playfulness.

This analysis confirms that abstract brand values are grounded in concrete acoustic properties. Composers can therefore design with scientific precision, rather than relying only on intuition.

Note that none of the 14 core attributes fall into the “Jester” cluster: these emerge from the musical features of sonic logos themselves. But, further benchmarking will reveal new attributes to tap into this cluster.

Strategic Implications

Evidence-based sonic branding: Move beyond intuition by designing logos with known acoustic drivers.

Segmentation: Recognise your logo's archetype – Harmoniser, Upsetter, or Jester.

Differentiation: Consider whether your logo should reassure, disrupt, or entertain.

Consistency: Ensure sound aligns with broader brand attribute maps.

Recommendations

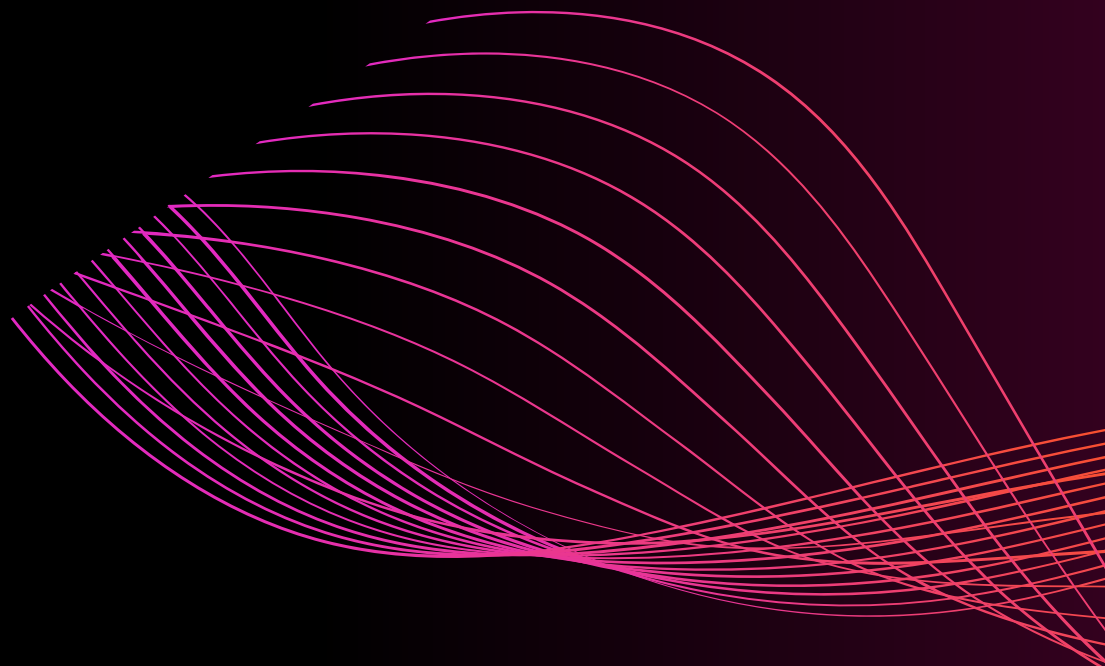
- **Bold** brands: emphasise strong percussive elements and dynamic variation.
- **Confident** brands: maintain harmonic clarity and avoid overly complex rhythms.
- **Peaceful** brands: focus on sustained tones, slower tempos, warm timbres.
- **Fun-loving** brands: introduce syncopation, rhythm shifts, and tonal playfulness.
- **Technical** brands: leverage brighter timbres, precise attack, narrower pitch ranges.
- **Jester-style** brands: use playful, sing-song motifs, memorable hooks, and humorous tones to maximise recall.

Conclusion

This research demonstrates that sonic logos are not arbitrary:

- They cluster naturally into three archetypes: Harmonisers, Upsetters, and Jesters.
- Brand attributes have measurable acoustic and melodic signatures.
- Marketers can now design sonic assets with confidence, precision, and consistency.

The result: a framework for strategic sonic branding that ties sound design directly to brand meaning.



5. About the OnBrand platform

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.