BrandedSong

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EVIDENCE REVIEW · SONIC BRANDING · BRAND MUSIC

Sound and the Brand

What the research says about music in branding, advertising and hospitality

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Music can make a brand easier to recognise, a venue more pleasant and an advertisement more memorable. It can also do nothing, or work against a message. This report sets out what the evidence supports, how strong it is, and how a brand can test the effect of its own music.

01

Key findings

This report reviews more than four decades of research on music in venues, in advertising and as part of a brand's identity. These are the eight findings we believe a marketing director can rely on, each graded for the strength of the evidence behind it (see Chapter 2).

STRONG

Music changes how people feel and behave, but the average effect is modest

Meta-analyses covering dozens of studies find small-to-moderate effects on pleasure, satisfaction, time spent and spending, tending to be stronger in service settings such as hospitality than in retail (Garlin & Owen, 2006; Roschk et al., 2017).

STRONG

Fit and liking matter more than simply having music on

A meta-analysis of 56 hospitality and tourism studies concluded that how well music fits the setting and how much guests like it shape responses more than its presence, tempo or volume (Trompeta et al., 2022).

MODERATE

Unmanaged or ill-fitting music can cost money

In a peer-reviewed, year-long trial in fashion stores, sales fell by 6% when staff chose the music (Daunfeldt et al., 2021). An industry working paper from 16 Swedish restaurants found revenue 9.1% higher with a brand-fit playlist than with music that did not fit the brand (Daunfeldt et al., 2017).

MODERATE

In advertising, music that fits the brand and message helps people remember both

Experiments show that well-fitting music improves recall of the brand, the product and specific claims, while attention-grabbing music that does not fit can work against the message (Kellaris et al., 1993; North et al., 2004).

MODERATE

Recognition is earned through repetition, so consistency matters

In online experiments, pairing brands with music people recognised "increased brand choice by 6%", especially when the music was liked (Anglada-Tort et al., 2022). Original music only gains that recognition through consistent use.

EMERGING

Sonic logo design shapes how a brand is perceived

The number of notes, the timbre, the emotional tone and the placement of a sonic logo change attitudes and perceived brand personality (Krishnan et al., 2012; Melzner & Raghubir, 2023; Scott et al., 2022). Evidence on long-term recall and sales is still limited.

EMERGING

On social platforms, sound helps, but it cannot carry the brand alone

In an independent lab study, muted ads in a mobile feed matched normal ads on every measure except brand recognition (Bellman et al., 2021). Audio-led brands need a visual cue for sound-off viewing.

MODERATE

Context changes the result, so there are no universal rules

Pleasant music lifted supermarket sales on weekdays but not at weekends (Ahlbom et al., 2023), and classical music has been linked to higher spending mainly where it suits the venue's positioning (Areni & Kim, 1993; North et al., 2003).

02

About this report

Purpose

BrandedSong creates original brand music, sonic branding and music and video campaigns for beauty, fashion, food and beverage, family, sports and hospitality brands. Clients often ask what the research actually shows. This report is our answer, written for marketing directors who want to know where the evidence is solid, where it is thin, and how to use music in a way that can be measured.

Music is not a shortcut to growth. The evidence supports a narrower and more useful idea: music designed to fit a brand, liked by the people who hear it and used consistently tends to do better than music chosen at random or left to chance.

Method

The report is based on a literature review completed in October 2026, in three strands: research on music in restaurants, bars, hotels, cafés and shops; research on music in advertising, sonic logos, short-form video and the brain science of musical emotion; and a claim-by-claim audit of our June 2025 report (Chapter 12).

Every source cited was opened during the research, through the publisher's page, the DOI record, a repository or an open-access full text; nothing was cited from memory. Each finding was confirmed from the full text, the official abstract or, for specific details, a named secondary source. Claims that could not be confirmed were left out, and numbers appear only where they were seen in a source. Where a study measured what people said rather than what they did, we say so.

How we grade the evidence

Each study is described by one of four evidence types:

1. **Meta-analysis or systematic review.** Statistically combines many earlier studies. The best guide to how large an effect usually is. Narrative reviews and conceptual papers are labelled as reviews in the text and used for context, not as evidence in their own right.
2. **Peer-reviewed experiment.** A controlled study, usually in a laboratory or online. Good at showing cause and effect, but simpler than real life.
3. **Field study.** Research in real venues or on real-world data. Realistic, but many classic examples ran in a single venue, decades ago, with small samples. Some are observational and cannot show cause and effect.
4. **Industry research.** Run or funded by research companies, platforms, agencies or music suppliers. Not peer-reviewed, often with methods only partly published. We always name who ran or funded it.

The key findings carry one of three strength grades. **Strong:** supported by at least one meta-analysis and consistent with several independent peer-reviewed studies. **Moderate:** supported by several peer-reviewed studies, but limited by small samples, few settings, laboratory conditions or reliance on a single

field trial. **Emerging:** a small number of recent, mostly experimental or industry studies, with important questions still open.

This edition replaces the June 2025 report

This report replaces "The Impact of Custom Music on Brand Recognition and Revenue in the Hospitality Industry" (BrandedSong, June 2025). An audit found that many of its claims did not hold up: some sources could not be found, some were cited with the wrong authors or year, and some findings were overstated. Chapter 12 lists what we no longer claim. BrandedSong sells brand music and so has an interest in the conclusions; we have tried to manage that by grading the evidence openly, including counter-evidence, labelling industry research and keeping client stories separate from the research.

03

Music changes how people behave in venues

Researchers have been changing the music in real venues and measuring what customers do since at least 1980. The picture is consistent in direction, modest in size, and heavily dependent on the venue.

The big picture

An early meta-analysis of 148 effects from 32 studies in retail settings found "small-to-moderate, yet quite robust" effects of background music on spending, time spent and feelings (Garlin & Owen, 2006). A larger one, combining 66 studies with 15,621 participants, found that environments with music produced higher pleasure, satisfaction and intention to buy or return than environments without. Effects ranged from small to medium and tended to be stronger in service settings than in retail (Roschk et al., 2017). Most outcomes were self-reported feelings and intentions rather than sales.

The most relevant meta-analysis for hospitality combined 56 studies and 209 effects from tourism and hospitality settings. It concluded that "it is not so much the presence of music but the design of it that influences customers": how much guests like the music and how well it fits had a much stronger influence than tempo or volume (Trompeta et al., 2022). The authors also note contradictory results across the underlying studies, a fair warning against treating any one study as a rule.

There is an important counterweight. A meta-analysis of background music in general, across many tasks, found no overall effect. In subsets, music had positive effects on emotional reactions and small negative effects on memory, and its tempo influenced the pace of activities (Kämpfe et al., 2011). Music does not help by default. Its benefits appear when it is matched to a purpose.

> Music in a venue is a design decision, not a switch to be turned on.

Tempo, time and spending

In a US supermarket in 1980, shoppers moved more slowly on days with slow instrumental music than on days with fast music, and the paper reports daily gross sales about 38% higher on slow-tempo days (Milliman, 1982). This figure is often misquoted: it compares slow with fast music, not music with silence, and describes store sales on different days, not spending per customer.

In a restaurant in the Dallas/Fort Worth area, across eight weekends and 1,392 customer groups, slow music kept diners at the table for 56 minutes against 45 with fast music. Bar purchases per group rose from $21.62 to $30.47, but food spending was unchanged ($55.81 against $55.12) (Milliman, 1986). A venue that needs to turn tables at peak times may not want longer stays.

Tempo is not the main lever. In a UK restaurant, whether diners liked the music explained their time spent better than its tempo did, and time spent was the strongest predictor of spending (Caldwell & Hibbert, 2002).

Musical style and what guests buy

In a British restaurant over 18 evenings, classical music led to higher spending per head than pop or no music, notably on starters, coffee, total food and overall spend (North et al., 2003). In a US restaurant's wine cellar, observed over 16 evenings in 1990, classical music produced higher sales than Top-40 because customers chose more expensive wines, not more bottles. The authors explained the result by fit with the prestige associations of wine (Areni & Kim, 1993).

In a Sydney restaurant study with 300 participants, classical, jazz and popular music were associated with diners saying they would spend more on a main course than with easy listening or no music, from AU$17.12 with no music to AU$21.82 with jazz. Style also changed how diners described the atmosphere. Evidence on actual sales was only partial, and on some days sales were lower with classical music (Wilson, 2003). The study shows that music shapes perceived atmosphere and value; it does not prove that classical music raises spending.

In a bar experiment, drinking songs appeared to increase length of stay and average spend compared with the bar's usual Top-40, which the author attributed to congruence with the setting (Jacob, 2006); licensed venues will weigh this against responsible service. More recently, a 13-month intervention in a single café found that afternoon jazz was followed by a statistically significant rise in beverage sales and ambience ratings, especially at weekends (Berčík et al., 2026).

Waiting and service evaluations

Music changes how customers feel about service. In an experiment on waiting, music of any emotional tone improved people's evaluation of the service environment, and positively valenced music produced a more positive response to the wait. It also made the wait feel longer, but that did not reduce people's positive behavioural response (Hui et al., 1997). A separate experiment found perceived duration longest with pleasant, major-key music (Kellaris & Kent, 1992). Liked music makes waiting more pleasant, not shorter. In two further experiments, a simulated bank (153 participants) and a real online shop (130 participants), pleasant music improved feelings about the service setting, which in turn improved service evaluations and purchase intentions (Morin et al., 2007).

Context: day, volume and positioning

In a Swedish supermarket chain, across about 150,000 shopping trips, pleasant music increased sales on weekdays but not at weekends, possibly because weekday shoppers are more mentally depleted and music lifts their mood (Ahlbom et al., 2023); the university's press release reported a weekday rise of more than 10%. Volume matters too: quieter music or background noise increased sales of healthier foods, while high volume tended toward less healthy choices (Biswas et al., 2019). "Classical music increases spending" is not a general rule. It has worked where classical music suits the venue, and the same logic applies to every style.

Hotels: the thinnest part of the evidence

Peer-reviewed field experiments in hotels are scarce. An analysis of 2,357 TripAdvisor reviews mentioning music, from 28 five-star hotels in Antalya, Turkey (2010-2022), found that guests complained about music too loud or fast to read, sleep or talk over, while fitting and liked music was associated with positive

evaluations (Çatir, 2023). This is observational, from one resort region, with no sales outcomes. A conceptual review for hotels draws mainly on restaurant and retail evidence (Magnini & Parker, 2009), which remains the best available guide for hotel brands until they measure their own results.

STUDY	SETTING	FINDING	EVIDENCE TYPE
Trompeta et al. (2022)	56 tourism and hospitality studies	Fit and liking matter more than presence, tempo or volume	Meta-analysis or systematic review
Roschk et al. (2017)	66 studies, 15,621 participants	Music raises pleasure, satisfaction and intentions; small-to-medium effects	Meta-analysis or systematic review
Kämpfe et al. (2011)	Background music across many tasks	No overall effect; positive for emotion, slightly negative for memory	Meta-analysis or systematic review
Milliman (1986)	One US restaurant, 1,392 groups	Slow music: longer stays, higher bar spend; food spend unchanged	Field study
North et al. (2003)	One British restaurant, 18 evenings	Classical: higher spend per head than pop or no music	Field study
Wilson (2003)	Sydney restaurant, 300 participants	Style changed atmosphere and stated willingness to pay; actual sales mixed	Field study
Ahlbom et al. (2023)	Swedish supermarkets, about 150,000 trips	Pleasant music raised sales on weekdays, not weekends	Field study
Çatir (2023)	2,357 reviews, 28 five-star hotels	Loud or fast music criticised; fitting, liked music praised	Field study

Reading the classic studies

The studies our industry quotes most often mostly ran in one venue, decades ago, over a few weeks. They show how music can work, not how large an effect a brand should expect. For that, the meta-analyses are the better guide: real but small-to-moderate effects.

04

Fit matters more than presence

If one idea runs through this report, it is fit: how well music matches the brand, the setting, the product and the moment. The evidence for fit comes from venues, laboratories and advertising research, and it is more consistent than the evidence for any single feature such as tempo or genre.

What "fit" means

A review of advertising research identified ten definitions of congruity: score, mood, repetition, association, valence, semantic, genre, image, tempo and timbre (Oakes, 2007). Music can fit a brand's image but not the mood of a moment, or match the genre customers expect but not the brand's personality. A useful brief says which kinds of fit matter for the job in hand.

Fit in hospitality and retail

The hospitality meta-analysis states that "music congruence has multiple positive, significant effects on customers" (Trompeta et al., 2022), echoing an earlier review of service settings (Oakes & North, 2008). In a restaurant field experiment, music that fitted the overall atmosphere raised guests' pleasure, which raised their ratings of both the environment and the service, and in turn their stated intention to return (Demoulin, 2011). Fit also works across the senses: in a store experiment, shoppers rated the store more positively, showed more impulse buying and were more satisfied when the energy of the music matched the energy of the scent (Mattila & Wirtz, 2001). Customers experience a space as a whole.

Fit steers choice

In a UK supermarket, French and German music was played on alternate days over two weeks beside French and German wines. French wine outsold German on French-music days, and the reverse happened on German-music days, while shoppers did not appear to realise the music had influenced them (North et al., 1997, 1999). The counts were small, in one store, and the music shifted choice between products rather than raising total sales.

Laboratory work explains the mechanism. In three experiments, music associated with a country increased recall and choice of menu items from that country, classical music increased willingness to pay for products with social-identity connotations, and country music did so for utilitarian products (North et al., 2016). In a memory study, rock music led people to recall more rock-stereotyped items, and earlier; the authors conclude that fit "operates by raising the salience of items" (Yeoh & North, 2010).

Fit and brand meaning

Music tells customers what kind of brand they are dealing with. In a qualitative study including in-depth interviews with 20 consumers and observation in themed stores in Australia and the United States, music that fitted the brand reinforced its position and, for people unfamiliar with the brand, signalled its position, image and quality. Music that clashed could lead customers to question their relationship with the brand,

although misfit could also be used deliberately in a repositioning (Beverland et al., 2006). In a simulated fine-dining setting with students, classical music changed perceptions of brand personality and décor, though not of service quality (Magnini & Thelen, 2008).

> Fit is not a single property. It is the match between the music and the brand's meaning, the moment, and everything else a guest can see, smell and taste.

When nobody owns the music

Two Swedish field experiments address a question every multi-site brand faces: who chooses the music, and on what basis?

The first is industry research. HUI Research, a retail research institute, worked with Soundtrack Your Brand, a music supplier that was then the provider of Spotify Business and curated the playlists. Over about five months in 2016, in 16 restaurants of one Stockholm-area chain, a playlist of popular and lesser-known songs chosen to fit the brand produced revenue 9.1% higher than randomly chosen popular songs that did not fit. A second brand-fit playlist of popular songs only showed a smaller gain, and the non-fit playlist performed worst (Daunfeldt et al., 2017; HUI Research & Soundtrack Your Brand, 2017). This is a working paper, not peer-reviewed, with the supplier as a partner, and its headline compares two music conditions, not music with silence.

The second is peer-reviewed. In a randomised field experiment in eight fashion stores of one brand in Stockholm, running 56 weeks with 4,626 observations, sales fell by 6% when staff could influence the music through an app. Staff had diverse preferences, changed songs often and favoured high-intensity tracks (Daunfeldt et al., 2021). The lesson travels beyond fashion: music left to individual taste drifts away from what the brand and its customers need.

Fit is necessary, liking is essential

Liking was the most positive influence of all in the hospitality meta-analysis (Trompeta et al., 2022), and a 2024 review of sonic branding suggests that "ensuring that a musical track is liked may well turn out to be more important than generating a track that happens to match the crossmodal associations" (Spence & Keller, 2024). Music that is perfectly on-brand but disliked by its audience will not deliver. The brief has to aim for both.

05

Music in advertising: attention, memory and emotion

Kantar reports that "84% of the ads we test globally have music" (Wyn Jones, 2021). In 1990, a classic review counted "fewer than 20 published empirical studies in marketing" on music (Bruner, 1990). The research has grown since, and it supports a more specific conclusion than "music works": music helps when it fits, when it is noticed and when people like it.

Music and memory

In an experiment with 111 Top 40 radio listeners aged 18 to 24, 30-second radio ads for four brands were paired with popular songs in four versions: original vocals, vocals with brand-adapted lyrics, instrumental and no music. The author concluded that "song vocals, either original or altered, are more effective stimuli of advertising effects than instrumentals or no popular music", although results varied by brand (Allan, 2006). All the songs were well-known hits. An earlier experimental study found that slogans set to a jingle were remembered better than slogans without music (Yalch, 1991); its abstract is not public, and this finding is reported through a secondary summary.

Recall the counterweight from Chapter 3: background music on its own has no reliable overall effect and can slightly impair memory (Kämpfe et al., 2011). The memory benefits in advertising come from music that carries the brand or message, through lyrics, a jingle or clear fit.

Fit in advertising

In experiments with broadcast-style ads, "increasing audience attention to music enhances message reception when the music evokes message-congruent (versus incongruent) thoughts" (Kellaris et al., 1993). Attention-grabbing music helps only if it fits. Two studies with specially prepared radio ads found that "musical fit enhanced recall of the products advertised, the brands advertised, and specific claims", and also improved ad liking and purchase intent; a voice that fitted the brand helped recall of claims and liking (North et al., 2004). This is the clearest experimental evidence that brand-fitting music helps people remember what a brand says, not only that it exists.

A study comparing tempo and style with likeability and congruency found that the latter two had more influence on ad responses, through both emotional and rational routes (Galan, 2009). A conceptual model of the wider literature concludes that responses to ad music depend on the situation, the music, the listener and how the ad is processed, can be negative as well as positive, and should be pretested (Lantos & Craton, 2012).

Emotion: useful, but not magic

A 1982 classroom study concluded that "hearing liked or disliked music while being exposed to a product can directly affect product preferences" (Gorn, 1982). It has not held up well. Three preregistered replications, with 158, 190 and 91 participants, found no effect with the original music; a version with

contemporary music reproduced it with a significantly smaller effect, and the combined result was null (Vermeulen et al., 2014). The replications tested a single exposure, not repeated real-world exposure, but they are a clear reason to doubt simple feel-good transfer.

Emotional tone still matters, not always as expected. In an experiment with 134 female participants, ads with sad music produced higher brand recognition, while ads with happy music produced higher purchase intention (Dogaru et al., 2024). The music should follow the campaign objective.

Industry data point the same way, without controlled comparisons. Nielsen's 2015 analysis of more than 600 US TV ads found that "commercials with some form of music performed better across four key metrics": creativity, empathy, emotive power and information power (Nielsen, 2015). Kantar reports a 63-point difference in its feel-good measure between viewers who most enjoyed an ad's music and those who did not (Wyn Jones, 2021), which partly reflects enjoyment of the ad itself.

Familiar music and original music

In two online experiments with 486 participants, people were familiarised with advertising music clips and then chose between pairs of unknown brands. Pairing brands with recognisable music "increased brand choice by 6% (d = .21)". The effect was stronger when the music was liked and was suppressed when it was most disliked (Anglada-Tort et al., 2022). The choice was artificial, familiarity was created in the lab, and the participant panel is run by a sonic research company. Even so, the study isolates something useful: recognition, not fame, drives the effect.

Familiar music starts with an advantage. Kantar reports that well-known music is associated with an average 11-point increase in its "ad distinctiveness" measure (Wyn Jones, 2021). In one Nielsen neuroscience test of a beverage ad, a well-known pop song scored about 20% higher on attention, emotion and memory than custom music (Vines, 2017). We include that result because it cuts against our own business.

The trade-off is ownership. A licensed hit brings recognition that belongs to the song, the artist and every other brand that has used it. Original music can be built to fit precisely and belongs to the brand alone, but it starts with no recognition and has to earn it. Kantar estimates that around a quarter of ads with music use music created or adapted for the brand, and that music accounts for about 4% of an ad's production budget (Wyn Jones, 2021).

> A famous song arrives with recognition already built. An original one has to earn it, and the way to earn it is repetition.

06

Sonic logos and audio brand assets

A sonic logo is a short, recognisable sound or phrase that identifies a brand, at the end of an ad, in an app or at the point of sale. It is usually one part of a wider set of audio assets. The peer-reviewed evidence is young. A 2015 review found the field fragmented and short of shared terminology (Gustafsson, 2015), and in 2023 a leading advertising journal ran an editorial titled "Sonic branding as a promotional tool: A concept whose time has come and a call for research" (Taylor, 2023).

What the experiments show

- **Number of notes.** In laboratory experiments, logos with very few tones (three) or very many (nine) were seen as less valuable than those with a moderate number, because they were harder to process (Krishnan et al., 2012).
- **Emotional tone and placement.** Happy sonic logos produced more favourable attitudes toward the ad, through emotion, and the best results came from a sad logo at the start and a happy one at the end (Scott et al., 2022). The study used novel brands and measured attitudes, not recall.
- **Timbre.** Across ten studies, "timbral sound quality in audio logos (i.e., roughness/smoothness) informs abstract judgments of brand personality (i.e., ruggedness/sophistication)". The effects extended to established brands and purchase intentions, appeared to operate outside awareness, and could be cancelled by conflicting cues from other senses (Melzner & Raghubir, 2023).
- **Emotion and engagement.** In a study of 167 participants, a sonic logo slightly raised positive emotion compared with a control. In a second study of 231, emotion linked the logo to brand engagement, but only for people who rely heavily on emotion when deciding (Kemp et al., 2024). One co-author works for a commercial music company.

These studies show that the way a sonic logo is built changes how a brand is perceived. They do not yet show, in peer-reviewed research, how much a sonic logo adds to long-term recall or sales.

Distinctive assets: a useful frame and an open gap

Romaniuk's book on distinctive brand assets, from the Ehrenberg-Bass Institute, organises the topic around fame and uniqueness and includes a chapter titled "The Power of Sound" (Romaniuk, 2018). The largest peer-reviewed study of brand-asset ownership tested 1,281 identity elements across 13 consumer-goods categories, with 26,755 respondents in 19 countries. Every element tested was visual or verbal, and the authors note that the work "could be replicated and extended to incorporate other element types, such as auditory elements like jingles" (Ward et al., 2020). Sound has not yet been measured this way: a caveat for anyone claiming proof that audio beats visual assets, and an opportunity for brands willing to measure their own.

A 2024 review is candid that the field's growth "has been driven by market research", and stresses "the important role that repetition plays in building up liking for music" (Spence & Keller, 2024). One author works at a commercial audio studio.

What industry data adds

Ipsos (2020). In 2,015 US video ads from Ipsos's testing database, audio assets appeared in fewer than 10%. Creative that used audio was "3.44 times more likely to appear in the high tercile" for branded attention, "driven by a notable 8.53 times for sonic brand cues", and Ipsos concluded that "audio assets are on average more effective than some visual assets" (Sheridan, 2020). These figures describe how often such ads appeared among top performers. They are not a measure of recall uplift, and they rest on a small number of ads.

System1 (2024). Across 4,164 ads from 56 brands over five years, the brands with the most consistent creative averaged 3.3 stars on System1's rating, a full star above the least consistent (Laughton, 2024). Soundtracks were mentioned as one feature of consistency; audio was not isolated.

Mastercard. Mastercard's 2019 sonic brand is a well-documented example of a complete system: a melody-based "sound architecture" used across "musical scores, sound logos and ringtones, to hold music and point-of-sale acceptance sounds", adapted across genres and cultures (Mastercard, 2019). The launch release included no effectiveness data. Its value as an example lies in consistency of application.

Tostitos. Trade press reported a 38% increase in brand recall for Tostitos's sonic logo, measured by the audio analytics company Veritonic before launch and six months after (AdExchanger, 2022). There was no control group, and the result is reported second-hand.

amp. The sonic branding agency amp ranks brands' use of sound each year; its 2024 edition, made with Spotify, ranked Mastercard and Shell highest (amp, 2024). It is a benchmark of practice, not evidence that sound drives results.

Why we label industry numbers

Several industry figures circulate in distorted form. Ipsos's finding that ads with sonic brand cues were 8.53 times more likely to appear among top performers has been restated elsewhere as an eightfold increase in recall, which is not what Ipsos measured. We quote industry sources in their own words, say who ran them, and avoid presenting associations as causes.

07

Sound-on platforms and short-form video

For many brands, the place a customer hears their music most often is a phone screen. This is also where the evidence is weakest: independent research on music in short-form video is scarce, and much of what exists was commissioned by the platforms.

Sound off is still common

Kantar states that "around 85% of viewing on Facebook is done with the sound off", without giving a method (Wyn Jones, 2021). An independent laboratory study compared video ads with normal audio, muted, and muted with subtitles. Muted ads produced lower recall and recognition overall, but the loss in free recall was significant only in a desktop news setting, and only for ads whose soundtracks carried "high amounts of information (speech and audio branding)". In a mobile social setting, "muted ads were just as effective as normal ads and subtitled ads … on every measure except brand recognition" (Bellman et al., 2021). The research was funded by a consortium that included Facebook, Google and television networks. Ads that carry their branding in the audio lose most when muted, so a brand that relies on a sonic logo or song also needs a visual cue that does the same job.

What the platforms report

TikTok has published findings from research it commissioned. It reports that "88% of TikTok users say sound is vital to the TikTok experience", citing a Nielsen study from July 2020, and a "120% awareness lift for brands that use TikTok's music-driven, sound-on ad solutions", citing a Kantar study from January 2021. Its summary of the Kantar study states that "TikTok is the only platform where ads with audio generate significant lifts in both purchase intent and brand favorability" (TikTok for Business, 2021a, 2021b). Neither summary gives sample sizes or methods, and the underlying reports are not public. These are platform claims about the platform's own advertising products.

Independent evidence is thin

An analysis of 2,553 automotive ad videos from ten brands on Douyin, the Chinese version of TikTok, posted between June 2020 and June 2023, found that loudness was positively associated with likes, comments and favourites (Wang & Li, 2024). It covers one category on one platform, is correlational and could not control for video quality or the algorithm. It does not show that louder or more prominent music causes engagement.

In practice

Until better evidence exists, design for both conditions: music that earns attention when sound is on, and visual branding that works when it is off. Plan short cut-downs at the composition stage, so the recognisable part of the music arrives early enough to be heard.

08

What brain research does and does not tell us

Neuroscience is often used to make music marketing sound more scientific than it is. The research helps explain why music matters to people. It does not show that any particular piece of brand music will work.

What it shows

A review in a leading neuroscience journal summarises imaging evidence that music "can modulate activity in brain structures that are known to be crucially involved in emotion, such as the amygdala, nucleus accumbens, hypothalamus, hippocampus, insula, cingulate cortex and orbitofrontal cortex" (Koelsch, 2014). A study combining two imaging methods found that intensely pleasurable music, chosen by the listeners, released dopamine in the brain's reward system at moments of peak emotion, with one region more involved in anticipating the peak and another in experiencing it (Salimpoor et al., 2011). In an imaging study of 13 students listening to 341 popular-music excerpts from their childhood and adolescence, a region of the medial prefrontal cortex tracked how strongly each song was tied to personal memories (Janata, 2009). This helps explain why familiar music feels personal.

Behavioural studies add that music can influence people without their apparent awareness, from wine choices in a supermarket (North et al., 1997) to judgements of brand personality shaped by the timbre of an audio logo (Melzner & Raghubir, 2023).

What it does not show

- The imaging studies are small: 13 participants in the memory study, and self-selected, intensely liked music in the dopamine study.
- None tested advertising or brand music. Songs from someone's youth are a different stimulus from a brand theme heard a few times.
- We found no credible source for the claim, repeated in our own previous report, that music engages more of the brain than any other stimulus.
- Brain responses are not business outcomes. Studies that pair laboratory measures with sales data, as a recent café study did by combining an EEG study of 44 participants with 13 months of field data (Berčík et al., 2026), are more useful to a brand.

> Brain imaging helps explain why music moves people. It cannot tell you whether your track will.

09

What this means for brands

The evidence does not support treating music as a guaranteed growth lever. It supports a disciplined approach: decide what the music is for, design it to fit, make sure the audience likes it, use it consistently and measure what happens.

Start with a brief, not a playlist

Music signals a brand's position, image and quality, especially to people who do not yet know the brand (Beverland et al., 2006), and timbre alone can make a brand seem more rugged or more sophisticated (Melzner & Raghubir, 2023). A brief should start with the brand, not a genre, and be specific enough to guide choices of instrument and sound. It should answer at least:

1. What should people think and feel about the brand when they hear the music?
2. Who is listening, and what music do they already like?
3. Where will it be heard: venue, ads, social platforms, phone, app?
4. What is each use for: recognition, message recall, atmosphere or purchase intent?
5. How will we know whether it worked?

Design for fit on more than one dimension

Fit can mean mood, genre, tempo, timbre, image or meaning (Oakes, 2007). Music that fits a brand's image may still clash with a quiet hotel lobby at night. In physical spaces it should also fit the scent, lighting, menu and pace of service (Mattila & Wirtz, 2001). Where a product has a clear origin or character, music that reflects it can make the product more memorable and more likely to be chosen (North et al., 2016).

Make sure the audience likes it

Liking has the most consistent positive effect in the hospitality research (Trompeta et al., 2022), and recognised music only helped brand choice when it was not strongly disliked (Anglada-Tort et al., 2022). Test music with the target audience before launch (Lantos & Craton, 2012), rather than relying on the taste of the people who commissioned it.

Choose the objective, then the emotional tone

Sad music helped brand recognition and happy music helped purchase intention in one experiment (Dogaru et al., 2024), and a sonic logo worked best sad at the start of an ad and happy at the end in another (Scott et al., 2022). There is no single right mood for a brand, only the right mood for a particular job.

Be consistent

Recognition drives music's effect on brand choice (Anglada-Tort et al., 2022), repetition builds liking (Spence & Keller, 2024), and industry data link consistent creative, including recurring soundtracks, to stronger ad performance (Laughton, 2024). Use one recognisable musical identity across touchpoints, as Mastercard has done (Mastercard, 2019), rather than unrelated music for every campaign, and judge original music over months, not weeks.

Plan formats and edits from the start

A single track rarely serves every use. A typical set includes:

- a full-length brand song or theme for campaigns, launches and venue moments;
- instrumental versions for background use, where lyrics would compete with conversation;
- short cut-downs for social video, with the recognisable phrase near the start;
- a sonic logo for the end of ads, apps and digital touchpoints;
- versions for telephone hold, check-in and other moments of waiting.

Because muted mobile ads lost most on brand recognition (Bellman et al., 2021), every audio asset also needs a visual partner, such as a logo moment or recurring visual motif timed with the sonic logo.

Avoid generic and unmanaged music

None of the studies here tested stock production music directly, so we make no specific claim about it. The logic still applies: music any brand can use cannot become one brand's distinctive asset, music that did not fit the brand underperformed brand-fit music in field research (Daunfeldt et al., 2017), and music left to staff choice reduced sales (Daunfeldt et al., 2021). In venues, someone should own the music.

Mind the room

Hotel guests complain about music that is too loud or fast (Çatir, 2023), volume can shift what people order (Biswas et al., 2019), and slow music lengthens stays (Milliman, 1986), which helps a quiet bar but may hurt a busy restaurant that needs to turn tables.

How production fits in

At BrandedSong, music is produced with AI-assisted tools, while research, strategy and creative direction are done by people. None of the research in this report compares production methods. What it does show is that fit, liking and consistent use make brand music work, and those depend on the brief and the creative judgement behind it.

10

How to measure the effect of brand music

Many classic studies in this report were run in a single restaurant, by alternating the music and counting what happened. Brands can do the same. The designs below run from most to least reliable.

Rotating conditions within a venue

Rotate music conditions across days or weeks in the same venue, for example brand music on some days and the existing music on others, as classic studies did (Milliman, 1986; North et al., 1997). The HUI Research restaurant study used a Latin square rotation so that each condition was tested across comparable days (HUI Research & Soundtrack Your Brand, 2017). Because effects can differ between weekdays and weekends (Ahlbom et al., 2023), give each condition a balanced mix of days and run long enough to cover several of each.

Holdout venues

Multi-site brands can introduce the music in some locations and keep others as a comparison, ideally assigned at random. The fashion-store trial in Chapter 4 randomised stores and used 22 weeks of earlier sales data as a baseline (Daunfeldt et al., 2021). Match venues on size, location and trading pattern, and compare the change in each group rather than raw totals.

Before and after, with a control period

A simple before-and-after comparison is the weakest design, because season, weather, prices, marketing and algorithms all change too. Strengthen it with the same period last year, a comparison venue that did not change, and a log of other changes, and describe the result as a change observed after launch, not as an effect of the music.

Brand lift studies

For campaigns, compare people exposed to the campaign with a similar unexposed group on recognition, recall, favourability or purchase intent. The control group is essential: the Tostitos measurement in Chapter 6 had none (AdExchanger, 2022), which makes it hard to separate the sonic logo's effect from everything else that happened in six months.

Ad pre-testing

Before launch, test versions that differ only in the music: with and without the sonic logo, different emotional tones, logo at the start or end, sound on and off. This is how many studies in Chapters 5 and 6 were designed, and it is the most direct check that the music fits and is liked (Lantos & Craton, 2012).

What to track

Choose one primary measure before the test begins and record the others as supporting evidence.

- **In venues:** revenue per transaction or cover; sales by category, since effects have appeared in drinks, desserts and coffee rather than across the whole menu (Daunfeldt et al., 2017; Milliman, 1986; North et al., 2003); time spent and table turnover; return visits; guest ratings of atmosphere; mentions of music in reviews.
- **In advertising:** brand recognition and recall, message recall, ad liking, purchase intent, and whether people link the music to the brand.
- **On social platforms:** completion rates, sound-on share where available, engagement, and others' use of the brand's sound.
- **Over time:** how many people in the target audience recognise the music and link it to the brand, and to that brand alone.

Setting realistic expectations

The meta-analyses point to small-to-moderate effects on average (Garlin & Owen, 2006; Roschk et al., 2017). A small effect can be valuable at scale, but it is easy to miss in a short test or mistake for noise. Write down the plan and the primary measure before starting, run the test for long enough, and treat one result as a data point, not a verdict.

11

Client experiences

Self-reported and qualitative

The two accounts below are our clients' own observations. They were not measured under controlled conditions and have not been independently verified. We include them to show how brand music is used in practice, not as evidence of its effect.

Sammy's Restaurant & Bar, Ireland

BrandedSong created an original song for Sammy's Restaurant & Bar. The manager reports that guests ask whether the song is the venue's own.

> "Our song gave this place a real identity. People ask if it's our own song. It is, and we're proud of it every single day." Leo M., Manager, Sammy's Restaurant & Bar

Apartamenty M&M, Poland

For Apartamenty M&M, BrandedSong created a two-minute song intended to reflect the character of the apartments. The owner describes it as a personal touch that guests remember.

> "The 2-minute song added such a warm personal touch. It reflects the charm of our apartments beautifully and leaves a lasting impression on every guest." Sabina Bożena, Owner, Apartamenty M&M

What we will do differently

Our June 2025 report gave percentage changes for two client venues with no stated baseline, comparison period or control for other factors, so we have removed them. Where clients agree, we plan to set up a measurement design before launch, using one of the approaches in Chapter 10, so that any results we publish can be read for what they are.

12

Corrections: what we no longer claim

For this edition, every claim in our June 2025 report was checked against original sources. Many did not hold up. We list them so that anyone who relied on the earlier report can see what has changed and why.

- **"Harvard Business Review (2019): music triggers memory recall with up to 96% greater efficiency than visual cues."** We found no HBR article with the title we cited. The only HBR article on sonic branding we located contains no such figure (Minsky & Fahey, 2014). The earliest trace of a "96%" claim is a 2006 trade article attributing it to university researchers with no method, sample or publication (Chief Marketer, 2006), and it has since circulated in several incompatible wordings. Removed. The verified evidence on fit and memory is in Chapters 4 and 5.
- **"North, Hargreaves & McKendrick (2000): restaurant study of classical, pop and no music."** The study exists, but the authors and year were wrong. It is North, Shilcock and Hargreaves (2003).
- **"Milliman (1986): slow music led to higher overall spending."** Slow music lengthened stays and raised bar spending; food spending did not change (Milliman, 1986).
- **"Kellaris & Kent (1992): congruent music improved shopper behaviour and perceived service quality."** The paper is about time perception and tested none of these. It found that pleasant music made time feel longer, contradicting our "time flies" framing (Kellaris & Kent, 1992).
- **"A Spotify-backed study (2021): brand-consistent music increased dwell time by 40%."** The likely source is the 2017 HUI Research working paper run with Soundtrack Your Brand, a supplier described in the press as Spotify-backed. It measured revenue (9.1% higher with brand-fit than non-fit music) and gave no dwell-time figure (Daunfeldt et al., 2017). A figure of around 40% more time in store comes from a separate vendor study in fashion stores comparing any music with silence (Soundtrack Your Brand, n.d.).
- **"Les Roches (2023): music is a key driver of guest satisfaction."** The source is a 2022 blog post, not research, and the phrase does not appear in it (D'Agostino, 2022).
- **"Journal of Advertising Research (2012): brand-aligned music produced stronger recall and purchase intent."** Not found. Peer-reviewed evidence for the idea is now cited instead (North et al., 2004).
- **"Nielsen (2017): music ads performed better on creativity, empathy, emotive power and brand linkage."** The study is from 2015, and the fourth measure was information power, not brand linkage (Nielsen, 2015).
- **"Morin (2009), Journal of Consumer Research: ambient music enhances trust in brands."** Not found. The closest match, Morin, Dubé and Chebat (2007) in the Journal of Retailing, found effects on service evaluations and purchase intentions, and did not measure trust.
- **"Music engages more parts of the brain than any other stimulus."** No credible source found; the popular-science book we listed does not support it (Levitin, 2006). Chapter 8 now cites a peer-reviewed review (Koelsch, 2014).
- **"Classical and relaxing music raises spending; fast pop and rock or no music lowers it."** Classical beat pop and silence in one British restaurant (North et al., 2003), but tempo, "relaxing" music and rock were not tested, and in a Sydney restaurant easy listening was linked to lower and pop to higher stated willingness to pay (Wilson, 2003).

- **Percentage results for two client case studies.** Self-reported, without baseline, comparison period or control. Removed; Chapter 11 presents client experiences qualitatively.
- **"Visual branding is insufficient" and "music can significantly boost revenue".** Opinion and overstatement. The evidence supports small-to-moderate effects that depend on fit, liking and context (Roschk et al., 2017; Trompeta et al., 2022).

13

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About BrandedSong

BrandedSong is a creative music and sonic branding company that creates original brand music and campaign-ready video content for businesses and marketing teams, across beauty, fashion, food and beverage, family, sports and hospitality.

This report is published by BrandedSong, a brand of AeLux Holding Pte. Ltd. It is a review of published research and does not constitute legal, financial or professional advice. BrandedSong has a commercial interest in brand music; see Chapter 2 for how we have handled that.

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