



UNIVERSITY OF GOTHENBURG

Finding the Perfect Playlist

Music branding in small restaurants

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Abstract

Not only does music influence our emotions and thoughts, it also influences our behavior. It has the power to lead our perception of value and even make us pay higher prices. Brands had soon realized the potential of communicating with their customers through music in their commercial spaces, but the music played was not always aligned with the strategy of the brand. Music branding was created in an attempt to achieve companies' communicative goals using music as a controlled strategic tool. However, since music and our relation with it has a unique place in our life, it is common for small businesses to manage their companies' music branding on their own, based on their own taste. Moreover, professional music branding companies focus their attention on big companies rather than on small businesses. Therefore, this thesis aims to understand the perception and application of music branding within small businesses like restaurants. In order to gain knowledge about the value of music branding as a strategic communication tool, interviews were conducted with nine companies offering professional music branding services. On the other hand, seven small restaurants were interviewed to understand the criteria behind their background music selection. The study concluded that small restaurants had a good understanding about basic principles of music branding but lack congruence and a holistic brand communication. Music branding companies on the other side focused on medium and big companies and overall did not represent an alternative to existing music streaming services. In addition, prices vary depending on the client and this could be perceived as an out of reach service for many businesses that could afford and benefit from music branding.

Key words: Music branding, background music, strategic communication tool, small restaurants, holistic branding

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Introduction

Reports have found that music listening has overtaken the time we spend watching television, movies, reading books or most of the other leisure activities (Rentfrow & Gosling, 2003). In order to spend so much time on it, there must be something special and unique about music. What kind of reward do the listeners get from music?

Abraham Maslow developed his Hierarchy of Needs Theory over a period of many years as a general theory of human motivation (Maslow, 1943; Miller, 2012). According to Maslow (1943), all people are driven by different needs and this could be represented in a pyramid. At the bottom of this pyramid, we would find the basic needs. Once these are satisfied, the individual concentrates on achieving the next higher level, until we satisfy the needs in the upper apex of the pyramid, the ones for self-actualization. The emergence of modern brands is a direct appeal to satisfy these innate needs in consumers; companies were concerned with appealing to basic needs, like feeding our hunger or quenching our thirst. Today, these needs have long been satisfied by our modern, convenient and relatively safe society (Lusensky, 2011). Lusensky (2011) claims that due to the prosperity and economic living standards of the Western world, brands focus on the top of the pyramid rather than on our basic level of needs. This means that rather than appealing to basic needs, companies help us satisfy our personal needs for identity formation, status, and self-fulfillment. The brands that we choose to align ourselves with on this level, will tell others who we are and what we believe in. But not only brands have that preference revealing power; according to an experiment carried out by Rentfrow and Gosling (2006), the music taste also provides unique information about personality in conversations between people becoming acquainted. Their results revealed that music was the most commonly discussed topic overall.

Music does not only influence our emotions and thoughts; it also influences our behavior (North & Hargreaves, 1996, 1998, 2005; North, Hargreaves, & McKendrick, 1999, Juslin & Västfjäll, 2008). It has the power to lead our perception of value and even make us pay higher prices (Grooves, 2012). Brands saw the potential of communicating with their customers through music and soon, retail stores, restaurants, and different businesses started playing music in their commercial spaces. We could say that music branding was created in an attempt to achieve companies' communicative goals using music as a controlled strategic tool.

However, some of the studies about music and behavior have certain disadvantages. Most of them are focused on the customer perspective but they are academic experiments instead of real-world environment experiments. In experiments in a controlled environment, researchers have a better control and, as a consequence, a greater opportunity to control some factors that might affect the outcome of the experiment. This is an important factor to

take into account if these results are going to be applied to businesses. Often, these experiments take place at a university with a large number of students, who are not representative of the affected customers of the actual company or subject of study (Daunfeldt, 2014). In addition, articles about successful cases of music branding (Morrison and Beverland, 2003; Thornton, 2007; Yorkston, 2010) focus the attention on big companies (e.g., Starbuck, Abercrombie & Fitch, McDonald's) rather than on small businesses.

Aim and research questions

This thesis is focused on the concept of music branding in the context of small businesses. Thus, this paper aims to investigate how music branding is done in practice by professional agencies as well as to explore and compare it to how is music branding perceived by small restaurants. The research questions are as follows:

- What is the value of music branding as a strategic communication tool according to professional music branding companies?
- What are the criteria that small restaurants follow to choose their background music?

Outline

In order to answer these research questions, the following chapter provides a background review of the use of music as a strategic tool of communication from the brand and the customer perspective. In addition, previous in-store music researches are presented. The following chapter three explains the methodological framework; a qualitative approach, semi-structured interviews, question design, coding and sample selection are presented. Chapter four presents the results of the interviews. The discussion of the findings in the music branding agencies and the small restaurants are presented in chapter five. Finally, the sixth chapter includes the conclusion and suggestions for further lines of research.

Background

In this chapter, the available knowledge is synthesized and divided into three parts. First, the relation between music and brands is introduced, together with the difference between sound branding and music branding. Next, the models and ways in which music can affect people are explained. Finally, previous in-store music researches are presented.

Brands meet music

Aaker (1991) defines a brand as a “set of assets which are linked to a brand name or symbol, which contribute to the value of a product or service” (p. 15). He also defines brand building as a “unique position a company creates in people’s minds and eventually the market by communicating internally or externally by fulfilling the brand promise made to its customers” (p. 15). Activity or inactivity, words or silence, all have message value. They influence others and these others, in turn, cannot not respond to these communications and are thus themselves communicating (Watzlawick, Beavin & Jackson, 1967, p. 49). And with no exception, everything a brand does is communication. Together with managing the brand’s design and language, most brand managers also invest money in communicating directly to the brand’s various stakeholders through direct mail and PR, telemarketing and website design, events and sponsorship programmes or through the various advertising media of television, print, cinema and radio (Feldwick, 2009). Within major brands, it is common to ensure the consistent implementation of their visual identity by creating a visual style guide. This style guide lists the different usages and aspects that the brand must follow to ensure the congruence of their image. It can refer to the use of the logo with a black background, the accepted font types or the size of the text among others.

There are other models and theories that claim the importance of using sensory branding. Lindstrom (2005) proposed a change from 2D (sight and hearing) to 5D branding, using five senses’ interaction (sight, hearing, smell, touch and taste). Through this *democracy of the senses* (Berendt, 1985; Bull and Black, 2003), the dominance of visualism is reduced and the other four senses can have a bigger role. However, according to Treasure (2011) sight and hearing must be considered the twin major senses for two reasons. First, because they can both carry specific messages in contrast to smell, touch and taste that can convey a large number of moods, feelings and ambiances but not so many specific messages. Secondly, because sight and hearing can both be broadcasted and that makes them the main two mass communication senses.

The classical conditioning paradigm

Ivan Pavlov developed the concept of classical conditioning. This type of learning was based on the association of a stimulus that does not ordinarily elicit a particular response with another stimulus that does elicit the response (Papalia, Feldman & Olds, 2007). In other words and applied to music, the classical conditioning implies that pairing a product (neutral stimulus) with a well-liked piece of music (unconditioned stimulus) will produce an association between the two, and as a consequence a preference for the product (a conditioned response).

In an experiment carried out by Gorn (1982), two pens of different colours (neutral stimulus) were showed to participants and then each paired with both liked and disliked music in the background. The results supported the classical conditioning approach and 79% of the subjects chose the pen with the music they liked (conditioned reaction). Gorn's study became quite influential but also subject of controversy since other researchers conducted similar experiments (Allen & Madden, 1985; Park & Young, 1986, Pitt & Abratt, 1988) and could not support the findings. In addition, other researchers (Kellaris and Cox, 1989; Middlestadt, Fishbein, & Chan, 1994) doubted that affective reactions to music could be measured using the classical conditioning paradigm. There is indeed a relation and influence between background music and our perception, however, it is not so strong to assert that it could affect our decision making in a clear way.

Audio branding and music branding

A Swedish research company (SIFO, 2008) asked 15,500 Swedes about advertisement avoidance. Results showed that 75% of them avoid advertising whether on television, radio or Internet. The number of advertising stimulus increases but more exposure does not necessarily mean more awareness. The music we hear in television commercials, for example, has the purpose of complementing the moving images. Maybe it is not even heard if the television is in mute or on the contrary, it can call the attention of someone who was not watching but just listening (Macinnis and Park, 1991). Either way, after 30 seconds the commercial is gone. The branding potential of music treats it as its own communication channel, just like television or print advertising (Lusensky, 2011, p. 47). Some of these channels of communication have the possibility to include sound or music; they are brand's touchpoints. The pre-recorded sound or music played on the different touchpoints can be original — composed and recorded specifically for the brand — or it can already exist (e.g., hits by original artists or theme-oriented recorded songs).

When the sound is original and strategically developed to create a holistic brand communication (considering the entire brand or image of the company), it is called audio branding. Depending on the researcher, it will be called audio branding, sound branding, or sonic branding, but all the terms mean the same. In the present paper, the term 'audio

branding' will be used since is the official term used by the *Audio Branding Academy*. The *Audio Branding Academy* was founded in Hamburg in 2009 and it is the first and only institution to globally promote a sophisticated and responsible use of sound and silence within branding efforts (ABA, 2015, para. 1). A brand's touchpoints are not limited to televisions commercials, they can be several: sound logos, applications for the cellphone, private branch exchange (PBX) phone system, voice mail or any other format that allows sound reproduction. They are the brand's voice and in many times, they could be where the customer meets the brand for the first time. Think about all the sounds that a computer does, for example. When it restarts, when a problem occurs or when you turn the volume up. The most popular are the sound logos, the Sonic equivalent to a graphic logo. They are often short, have a distinctive melody ranging from 3 to 5 seconds (Lusensky, 2011, p. 87). Think about the sound that goes together with the logo at the end of commercials from Nokia, Intel or different car brands like Ford or Audi.

On the other hand, music branding refers to the procurement, the research, and the recommendation of already existing music for an environment; aligned with the strategy of the brand. When we talk about an environment, it does not only apply to retail stores since it could also be a television show or a sport event, for example. Whereas, when the music is curated for television, videogames or other any other media, we are talking about music supervision. Thereby, people selecting the music are called music curators or music supervisors.

Customers meet music

Familiarity

To explain why music is of such high value across all human societies, Salimpoor, Benovoy, Larcher, Dagher and Zatorre (2011) conducted a study based on chills or musical frissons. According to the authors, pleasure is a subjective phenomenon that is difficult to assess objectively, however, physiological changes occur during moments of extreme pleasure, which can be used to index pleasurable states in response to music. The researchers injected a radioactive tracer to the participants that binds to the receptors of dopamine and played some of the participants' favorite songs. As a result, after 15 minutes of listening to the music they liked, the brain had a high dopamine activity.

Another study (Salimpoor, van den Bosch, Kovacevic, McIntosh, Dagher, & Zatorre, 2013) indicated that when someone listens to a song for the first time, certain neural connections can predict how much we will like the music we are hearing. Researchers used functional magnetic resonance imaging to track real-time brain activity and investigate neural processes. Participants listened to the first 30 seconds of 60 unfamiliar songs. To quantify how much the participants liked each song, they had the chance to buy the full

version of it with their own money. Participants could choose to pay between \$0 and \$2. The scanner highlighted the activity in the nucleus accumbens and other areas such as the auditory cortices, amygdala, and ventromedial prefrontal regions also showed increased activity during the listening. The increasing functional connectivity of these regions with the nucleus accumbens was the best predictor of the amount listeners were willing to spend on previously unheard music. These preferences are guided by past musical experiences. Depending on what styles the listener is used to — jazz, rock, heavy metal, pop — these genres follow different rules and they implicitly get recorded in the brain. Every time we are listening to music, we are constantly activating those templates. Using those musical memory templates makes the nucleus accumbens act as a “prediction machine”. It predicts the rewards that the listener feels from a song based on similar types of music listened to before (Salimpoor et al., 2013).

Fujikawa and Kobayashi (2010) studied the *familiarity effect*, a change of preference in the presence of familiar background music/sound. The research analyzed if familiar and unfamiliar music and white noise could affect the behavior of the participants, who were asked to make decisions in choice under risk and inter-temporal choices. The participants listened to background music/sound through personal headphones and were asked to answer different paradigms. These paradigms were probability-based paradigms (e.g., choose between 4000 yen with 80% and 0 yen with 20% probability or 3000 yen for sure) or description-based paradigms (e.g., 4000 yen if the event X occurs and 0 yen if the event Y occurs or a sure payoff of 3000 yen). The results show that background noise affects human performance in decision-making under risk and inter-temporal decision-making, but did not prove significant change of the preference in the presence of familiar background music due to the *familiarity effect*.

Indexicality and musical fit

The role of advertising executional cues (e.g., music, pictures) in high and low-involvement consumers’ processing of ads has been the subject of previous studies (Petty, Cacioppo, & Schumann 1983; Petty and Cacioppo, 1986). The results showed that executional cues have their predominant effects on the attitude formation process of low-involvement consumers. Macinnis and Park (1991) changed the focus and instead examined the impact of specific characteristics -fit and indexicality- of the same executional cue -music-, on high- and low-involvement consumers’ processing of ads.

Dowling and Harwood (1986) argued that music can become associated with previous emotion-laden experiences. The extent to which music arouses emotion-laden memories is defined as indexicality. According to Macinnis and Park (1991), “music with high indexicality induces strong emotions that are tied to past experiences [...] As a characteristic of music, indexicality often is unrelated to the advertised message”. The authors argue that

especially the strong emotions that are associated with high-indexicality music may enhance low-involvement consumers' interest in the ad and its music and, therefore, stimulate incidental learning of the message. It can also recover favorable emotions from memory, influencing high- and low-involvement consumers' feelings and ad attitudes.

Hecker (1984) argued that when background music is used appropriately it augments pictures and colors words, and often adds a form of energy available through no other source. Macinnis and Park (1991) referred to the complementary role of music as a characteristic called 'fit'. According to them, fit is defined as consumers' subjective perception of the music's relevance or appropriateness to the central ad message. When music fits an ad, it can be "conceptualized as a message-relevant executional cue because it supports and reinforces the basic advertising message" (p. 162). Results of their experiments showed that fit had similar effects on the high- and low-involvement consumers' focusing of attention on the music or the message. In the case of subjects with high-involvement, when music fit and corresponded with the rest of the items, the individual parts did not compete between them and therefore they were not perceived as separable and consequently create emergent meaning (Macinnis & Park, 1991). Applied to in-store music, other studies (Sharma & Stafford, 2000; Dubé & Morin, 2001; Beverland, Lim, Morrison, & Terziowski, 2006) support that when fit occurs, the positive effects of in-store music do not occur in isolation from other in-store variables, and the brand's position. Zander (2006) based his research on Macinnis and Park's (1991) theory of musical fit and found that music can influence subjects' impressions of product endorsers and brands of advertisement. Relatedly, different but congruent music styles can change our focus of perception without affecting general evaluations of the product. Results indicated that under the condition of fit, music has to be considered and used in a more differentiated way since it can convey information about the brand that words cannot (Zander, 2006).

On the other hand, lack of fit or poor choices of music can have both positive and negative effects. In Macinnis and Park's (1991) study, lack of fit created more negative emotions for low- than for high-involvement consumers. Another finding referred to the significant impact of negative emotions on low-involvement subjects' beliefs. Low-involvement subjects appeared to use the negative emotions that are generated by a lack of fit as a basis for disbelieving the ad claim. Another study (Beverland et al., 2006) about in-store music showed that lack of fit could cause either a loss of status or a positive repositioning. In the case of lost status, lack of fit could result in confusion, leading to a reduction of the stay time or exit and customers without prior experience with the brand, could avoid the store. Depending on the previous experiences with the brand, this lack of fit could be either easy to remedy without affecting the perception of the values of the brand, or mean a loss of status and undermine the brand's authenticity and perceived sincerity (Aaker, Fournie, & Brasel, 2004; Kates, 2004; Beverland, 2005, Beverland et al., 2006).

Positive effects of misfit were also identified in Beverland et al.'s study (2006), since companies wishing to reposition their brands in this way could challenge consumers' previous assumptions. However, this lack of fit could also provoke unintended consequences (such as a brand associated with older people that started playing Top 40 music as an attempt of trying to connect with a younger market, but instead was associated with lower prices).

In-store music branding

Garlin and Owen (2006) analyzed the results of 32 scientific studies and found that there is scientific evidence affirming that consumers prefer background music when they are in a commercial marketplace compared to when no music is played. It also showed that it is more important that consumers like the music than recognize the songs. Elder, Aydinoglu, Barger, et al. (2010) suggested future research to investigate the relationship between those two effects. Andersson et al (2012) also studied how the presence of background music influences consumers' purchasing decisions. The experiment took place during four days in mid-December in a consumer electronic store. The music was adapted for Christmas and the data was collected from 150 customers that responded to a questionnaire after they visited the store. The study indicated a significant effect of improvement when music was played compared to when it was not. When music was played clients spent 23 minutes inside the store and 11 minutes when no music was played. It was also shown that the longer the customers spent in the store the more the sales increased. According to the results, sales increased 910 SEK when the background music was played, which corresponds to an increase in sales with approximately 78 percent. The result of the study is interesting but may not be representative since only one store is used in the experiment and the result may be affected by the days of the week in which the music is played. In addition, the chosen dates close to Christmas time could also have affected the increased sales.

Other studies focus more on the different music styles played and the amount of money that customers are willing to spend (Wilson, 2003). In this experiment carried out in a restaurant located in Sydney, four different music styles were played (jazz, pop, light background music and classical musical) on different days as well as no music and a day with the music that the restaurant usually played. Classical, jazz and popular music resulted in the clients being prepared to spend more money on their main meal than when no music or easy listening music was played.

The relation between music and perceived shopping times has been widely studied (Yalch & Spangenberg, 1990, 2000; Kellaris & Kent, 1992; Grewal, Baker, Levy & Voss, 2003) and results support that perceived time duration is higher when the music is familiar but actually shopped longer when exposed to unfamiliar music. On the other hand, when consumers like the background music, no matter if it is familiar or not, they feel they have

spent less time shopping relative to the actual amount of time they have spent in the store. If they do not like the music, despite the short amount of time they have actually spent in the store, they claim to have been there for a much longer period of time (Krishna, 2011).

The music selection can also be used for the opposite effect, to prevent certain groups of individuals from visiting or staying in a store. Recently, an increasing amount of news have shown the way that different municipalities and business have used classical music in several physical contexts to avoid the presence of certain groups of individuals (e.g., young people, drug dealers, homeless people) (The Independent, 2008; The Seattle Times, 2009; Washington Post, 2012). A clear example of a retail store using music to filter their customers is Abercrombie & Fitch. Morrison (2002) studied the use of strategically selected in-store music and found that Abercrombie & Fitch focused on music first and merchandise second. The loud and up-tempo music played inside made the store appealing for younger generations but adults interviewed said that they could not stand the continuous sound bass of the techno music inside the store.

Method

In this chapter the research methodology is presented. It is divided into four parts. First, the motivation to choose a qualitative research method is explained. Second, semi-structured interviews are presented, through which the data was collected. Seven restaurants in Gothenburg (Sweden) were interviewed, as well as nine professional audio and music branding agencies. Third, the interviews were transcribed and coded. Fourth, the chapter presents the reliability, validity and ethics of the study.

Qualitative research

A qualitative approach was applied in conducting this study. The reason for this is that the purpose of the study includes explaining, interpreting, and investigating the values and motivation of individuals and companies rather than measuring the quantity or frequency of a phenomenon. According to Hennink, Hutter, and Bailey (2010, p. 205) qualitative research should be conducted when “researchers need to understand, explain and interpret human experience, which requires uncovering personal, social and cultural meanings that underlie people’s behavior”. Examples of uncovering personal meanings in this specific study includes for example investigating the motivation of people to play certain background music, while an example of cultural meaning can be found related to the research question about the value of music branding.

Semi-structured Interview

Semi structured, in-depth interviews were conducted with nine audio and music branding companies and seven restaurants. In-depth interviews are a useful tool in order to identify for example how people make decisions, the motivation behind certain behavior, and people’s beliefs and perceptions (Hennink et al., 2010, p. 110). All the examples above were of high interest for this study. The reason for this type of interview to be conducted instead of for instance a focus group discussion is that the focus of this study was on individual experiences and the context within which these people work and act. As a contrast, a focus group discussions focus more on the perspective of other people and community issues (Hennink et al., 2010). Neither a qualitative survey was considered an appropriate method of data collection for this study since the possibility for the respondents to ask questions and let the researcher know if anything was unclear was considered an important aspect. Furthermore, the possibility of asking follow-up questions as well as asking the respondents to develop their answers on a certain issue was considered a crucial benefit of an in-depth interview that a survey does not offer (Rugg & Petre, 2007).

According to Rugg and Petre (2007) there are hard-wired and soft-wired structured interviews. In the hard-wired one the researcher decides on the exact questions and topics

while in the soft-wired interview the researcher decides on overall topics and questions but then adjust the questions depending on the answers. The interviews conducted within this study were soft-wired semi structured interviews. This means that some overall topics and questions were decided in beforehand but space was also left for the interviewees to develop their answers, and for the researcher to ask different follow up questions depending on the answers, this is a strength of semi structured interviews according to Rugg and Petre (2007). As an example, it was decided in advance that the topic “working with clients” would be touched upon when interviewing the music branding companies. However, depending on which themes, issues and benefits that the companies mentioned, the remaining questions had to be adjusted to fit the specific context, circumstances, and challenges of the company.

Since the music branding companies were all based outside of Gothenburg (Sweden), the interviews took place through telecommunications application software such as Skype or Facetime and through telephone. The overall length was about 35-45 minutes. All the interviews with the restaurants took place in person, except for one that was conducted over the telephone, and the average length was about 30-40 minutes. The possibility to interview the majority of the representatives from the restaurants in person was especially beneficial for two reasons. First, they did not know as much about the topic of this study, i.e. the concept of audio branding, as the companies. Thus it was helpful to meet in person, to be able to read the body language and to clarify when needed. Secondly, meeting in person also meant that the interviews could be held in the physical environment, the restaurants, where the background music which was the main focus of the interview was playing. This added an extra dimension to the interview and the interviewees could easily explain by showing how the procedure of choosing and playing the music worked.

Sample

One effective way of recruiting interviewees is according to Rugg and Petre (2007) by consulting your social and professional networks. In order to find suitable restaurants to interview, the social network of the researcher was thus consulted and asked to recommend restaurants where they usually went. The target group mostly consisted of students from Gothenburg University and priority was given to the recommendations accompanied with a comment about the music of the place. In addition, the restaurants interviewed needed to have only one restaurant in town (to not be part of chain). The final selection of interviewed restaurants is presented in table 1 together with relevant data collected in the interviews.

In order to get a global perspective on music branding, sound and music branding agencies from different countries were included in the study. The participant recruitment was done through professional networks. First, agencies with a membership in the *Audio Branding Academy* were contacted. Secondly, agencies found through the professional

social network “LinkedIn” were contacted. In order to find these agencies the following search terms were used: *sonic branding, sound branding, audio branding, music branding, and music supervision*. Lastly, some of the companies found through these two networks further recommended other agencies relevant for the study. This kind of sampling is called snowball or chain referral sampling and is a rather common method of asking people within an area to refer to others who possess similar characteristics or knowledge (Biernacki & Waldorf, 1981). The final selection of interviewed agencies is presented in table 2 together with relevant data collected in the interviews.

Table 1. Demographic characteristics of the Restaurants in Gothenburg (Sweden) interviewed:

Restaurant	Founded Year	Employees	Capacity	Food type	Average price	Average time per service
Basque	2013	2-5	100 pax	Pintxos	25 SEK	120-180 min
Brygghuset	2012	17	350 pax	International	160 SEK	120-180 min
Henriksberg	2000	15-18	135-225 pax	International	150 SEK	120-180 min
Lagerhuset	2010	12	100 pax	International	150 SEK	120-180 min
Oceanen	1998	1	50-60 pax	Sandwiches and salads	50-60 SEK	120 min
PCBar	2001	6	150 pax	International	90 SEK	60-120 min
TomToms Burritos	2014	5	30 pax	Mexican	85 SEK	20-30 min

Table 2. Demographic characteristics of the audio and music branding agencies interviewed:

Company	Founded year	Nr of employees	City	Country
Audiobrain	2003	11	New York	USA
Fry	2001	5	Stockholm	Sweden
PCMusic	1999	60	Toronto	Canada
Radja	2008	3	Malmö	Sweden
Splatter	2006	24	Shanghai	China
We Are The Supergroup	2011	5	Toronto	Canada
We Sound	2011	7	Berlin	Germany
Why Do Birds	2010	7	Berlin	Germany
Zanna Sound	2007	5	Rio de Janeiro	Brazil

Question Design

The design of the interview guide used in gathering the data of this study reflects the concepts of the research questions as well as the theoretical framework of this study, as suggested by Hennink et al (2010). However, the questions are designed to answer the research questions in a more implicit way and thus the concepts from the theoretical framework are not used directly. The reason for this is, according to Hennink et al. (2010), that it can be difficult for the interviewees to understand and relate to such theoretical concepts. An example of this includes not asking directly “what is the value of music branding” but instead to ask more concrete questions such as “how can music branding benefit small to medium business in profiling themselves towards the customers”. In this way the research question can be answered in a more indirect way that is easier to understand for the interviewee. The questions were also designed to fit the target and adjusted to a style of language that the person would be familiar with. This meant that more professional and specific terms could be used when interviewing the audio and music branding companies, while more everyday language was used when talking to the representatives of the restaurants since they were not as familiar with the topic.

Questions used in an in-depth interview should be open, short and simple. Moreover, they should not be leading or directing the respondents in a certain direction (Hennink et al., 2010). Because of this it was important not to make any value judgments and to make sure that the respondents knew that there was no right or wrong answers. Especially among the respondents from the restaurants a certain amount of uncertainty could be noticed related to their knowledge about music. Hence, it was important to avoid questions including an implicit judgment.

Transcription and Coding

Data analysis consists of two phases: transcribing and coding. In the first phase transcripts of the recorded interviews are prepared. For the transcription of interviews included in this study the web app Transcribe was used. Transcripts often differ in their precision and some researchers spell words the way they are pronounced and also include grammar mistakes. Rubin and Rubin (2005) however points out that the transcripts do not have to be this perfect. Only if it serves a purpose for the study do different language mistakes need to be included. In this case of this study the full length of the interviews have been transcribed without including mistakes in pronunciation and grammar. That would have been a too time consuming process since the majority of the interviewees do not have English as a native language. When a word was unclear or if the meaning was ambiguous this was marked in the transcription. Rubin and Rubin (2005) argue that the analysis of the data starts already in this phase since concepts, themes, and events are being refined and elaborated on. Because of this, thoughts that appeared about the content and how it related to the other interviews were written down in a separate document during the transcription process. No personal reflections were included in the document of the transcription in order to not confuse what the interviewee said with own interpretations.

Coding the data

In order to identify the variety of possible codes five initial transcripts were randomly picked from the music branding interviews and the restaurants. Hennink et al. (2010) argue that only about one third of the data needs to be read in order to develop codes. They further state that it is helpful to choose diverse transcripts in order to identify a broad range of categories and topics. The point of saturation, that is when no new codes were discovered in the data, was reached after reading six interviews in the case of the agencies and four interviews in the case of the restaurants. Both deductive codes that originated from the researcher and the topics in the interview guide, as well as inductive codes, which originated from the issues raised by the interviewees, were used (Hennink et al., 2010).

In the first reading of the data many explicit codes were identified but some of them were refined afterwards. For example the quote “If you run a hotel and you play Katy Perry and Beyonce in the lobby, the actual value of music becomes more about a distraction rather than attraction” lead to the code “mainstream” that was later changed to “value”. This is an example of how codes can be adjusted and merged together when compared to codes from other transcripts (Rubin & Rubin, 2005)

Reliability, Validity and Ethics

The word *reliability* refers to the consistency and trustworthiness of the findings. One common issue of reliability relates to the objectivity of the researcher and the freedom from bias. It is never possible for a researcher to be entirely objective when conducting a qualitative study since it is dependent on the researcher’s ability to interpret what is said and relate different concepts to each other (Kvale, 2007). However, a great importance has been given to the accurate presentation of the answers from the interviews and to avoid rushing to conclusions not supported by the data. Also, leading questions have been avoided and the researcher has been very careful of not making any value judgments about for example whether the restaurants chose to invest a lot of time in choosing the music or not, or about which style of music they preferred. Instead the aim of the interviews has been to create a picture as clear and objective as possible about how the different companies worked with and reasoned about the topic, this without affecting their attitudes.

Validity refers to whether the study has investigated what it was designed to investigate or not (Kvale, 2007). One way of securing the validity of this study has been by collecting the data from primary sources. In the case of the restaurants only individuals in charge of choosing the music have been interviewed. Likewise, in the case of the companies, only individuals who are directly involved in the process of sound or music branding on a daily basis have been interviewed. In this way, it has been secured that the data gathered contains firsthand information about the procedures and methods used.

Also ethical issues have been reflected upon and taken into account during the process of conducting this study. One important ethical consideration when performing an interview has to do with *informed consent*. This includes informing all the participants about the purpose of the interview. Also, information regarding *confidentiality* such as publishing of names and recording the interview needs to be taken into consideration (Kvale, 2007). All the agencies included in this study were informed about the purpose and topic of the study via e-mail and also one more time prior to the beginning of the interview. The restaurants were informed in person at the point of the first approach and also once again before beginning the interview. Moreover, all the subjects participated voluntarily and were asked for permission to record the interview. The names of all the participants

have been anonymised and the names of the restaurants/agencies have been used with their approval. Furthermore, participants that asked for the possibility to approve their quotes before the publication of the paper were contacted and provided with a copy of all the pages containing the name of the company. Finally, all the participants had the right to rectify without any negative consequences and all data that could compromise the participants have been anonymised.

Results

In this chapter the results from the collected data in the interviews are presented. The chapter is divided into seven sections to better understand the content: music as a strategic communication tool, music profiling, activation, measurement of the impact, profitability and cost, IT, and future. The results of each section are presented first for audio and music branding companies and later for small restaurants.

Music as a strategic communication tool

Audio and music branding companies

The results show that audio and music branding companies include music branding as a part of their corporate identity since music has the power to build the image of a brand in our heads. Therefore anything that a brand does with sound will be judged and perceived as a part of the brand by the audience and by the target group. According to *Why Do Birds*, no matter what kind of music the business plays, it still has an influence on the brand's image. "As soon as you start communication, anything will be a strategic tool, whether you like it or not". When talking about music as a strategic tool, the vast majority of the companies talked about the power that music has to create brand experiences and defined music branding as the intentional audio for the purpose of creating a brand experience.

In order to explain the importance of music within branding, seven out of nine companies underlined the need of thinking about music identity in the way we do it about visual identity. Companies often focus on the visual part in order to make sure that everything "looks appealing" and leave music "more in a side", playing "some music that nobody complains about" according to *Radja*, and "this makes the brands lose the opportunity of adding strength to their whole concept". *Zanna Sound* believes that by not using music in the same strategic way as they are using the visual strategy becomes a weakness as "they are not using the full potential of the experience of the environment".

Furthermore, results showed that there was relation between a musical selection in tune or aligned with the strategy of the brand and the positive perception and experiences for the customers of those businesses. To understand the approach that music branding companies have to brand communication and strategy, *Radja* explains the similarities between the procedure with visual and sound identity:

"...from that visual identity you can develop different kind of products. In that identity you find a particular type of phase, you create your logotype or the color you should work with and also the language you should work with. What kind of words is your company talking with and from that graphical product you can produce different kinds of products. And we have the same approach, but we are having sound as a product instead. So we are creating this sound identity around a brand and from that sound identity we can develop different kind of sound products: playlists, podcast, especially written music or small earcons".

According to the companies interviewed, brands communicate by sound, but not all have control about how they are heard. The use of music is not just limited to adding sound to a physical place that did not have it before, it is about taking control over their audible environments and create a brand that you can hear and differentiate. *Why Do Birds* gives an example:

“I don't have to be a super brain to put together a nice playlist for, I don't know, a Levi's store or a supermarket. [...] I think you, me and our friends could all be capable to do something that nobody would complain about. You could probably do a good job but the music that you are putting together for the Levi's store could be the same for H&M or Marc O'Polo, I don't know. [...] So maybe after thinking about it, what is special about the brand that we can differentiate it in the sound world, make it work for that brand and still play something people also would expect to hear”.

The results support the fact that music has a strong relation with emotions and perceptions. *We Sound* explains that “brands have a high-complex multidimensional construct in our imagination and are not reduced to visual tones. [...] Brands are multisensorial. Sound it's just a part of it and music it's just a part of sound”. For *Zanna Sound* music works in an “invisible way”. Often people that are exposed to the music of a store “feel and perceive things and they are not conscious”. If someone would ask them about their perception “they are not capable to answer if the music was irritating them, because they just don't know that is happening”.

In this way, music not only helps to create different ambiances or differentiating one brand from the other, it also has a value. *Fry* argues that that “value can sometimes be a distraction or an attraction” depending on the brand's strategy. *Radja* explains that the perception of music varies depending of the individual, “a really joyful memory for one person could be a really sad and emotional memory for another person”. Also, the use of specific artists, for example, generates different opinions regarding value.

Radja gives an example of how a brand can benefit from the use of certain artists' music:

“... we cannot predict exactly what the people are going to feel but you can, from an overall perspective, borrow something from that artist and say to the customers that we like this music too. We like to listen to it in our environments and we want you to listen to it while you are here. And by saying that you can have a little bit of the artists' charisma and borrow it to your own company”.

On the other hand, *Fry* believes that the use of famous artists' music hinders the differentiation of a brand:

“If you run a hotel and you play Katy Perry and Beyonce in the lobby, the actual value of music becomes more about a distraction rather than attraction. In the sense that the brands of these artists are so strong and they are so all over that they will probably not really enhance the brand of the hotel. However if you do it with similar artists, similar flavor, energy, everything what you're looking for but still, giving room for the brand of the client to breathe and be exposed, then I believe it does a better job”.

Still many companies prefer to play mainstreams music like *PCMUSIC* explains, “sometimes there are restaurants, fast-food chains for example, that only want the Top 40 music and we chose the music based on the what has been popular”. *Splatter* stresses that mainstream music is not always what the brand needs.

“All they are thinking is who is cool, who is popular [...] they don't think in a very nuanced way in terms of which style of music aligns with us or what kind of message does a certain kind of artist portray for us. They are just thinking, for the most part, in crude terms. That's why we get work because we can give them a much more detailed picture and offer specific artist recommendations based on whether they are trying to reach a mass market or reach a very specific niche of people with a certain lifestyle”.

In addition to the distraction or value of attraction, five music branding companies also agreed that music has the capacity of making customers feel uncomfortable as well. Two of these companies mentioned the volume as a factor and the other four named lounge, house or chill out music as the main genres that are usually misused. *Zanna Sound* explains that “there are companies without a methodology that just play this kind of lounge music. So all the stores that you pass in a shopping mall are always playing the same music. Sometimes is almost impossible to be inside of the store cause you get irritated. You can't speak with the seller and the experience is a whole mess and you end up leaving”.

On the other hand, this negative impact of music on customers is, at the same time, strength when sound and music branding agencies try to explain the importance of using the right music to their clients. Despite the different opinion about the use of mainstream music, all the music branding companies agreed on the increasing awareness of their clients about the importance of music in their businesses. *Audiobrain* argues that “brands are becoming more aware of what they sound like [...] and the whole customer experience is very very important right now for them”. *Splatter* emphasizes the “need to build up a more solid argument beyond saying music is important, so they can understand how that potentially using music in a right way could translate sales and increase incitement for their brands. [...] So a part of the process it's actually educating the people who are in charge of the brands”.

On the other hand, four companies agreed that this knowledge can often be related to the need of maintaining their brands updated. *We Sound* argues that “very often brands have no idea what they really need. They just know they need something, but they don't really know what exactly”. *Why Do Birds*, *Zanna Sound* and *Audiobrain* explained that most people in the marketing side of companies have heard of audio branding and they are mostly familiar with the sound logos. These companies also argued that it is common to find clients who just want a sound logo composed. *Audiobrain* described it in the following excerpt from the interview:

“We don't just hand off music. Sometimes they [the companies] wonder about, you know, ‘can you just write some logos and send them over?’. And we try to tell them this is not what is going to work for a long term initiative. So sometimes they come in and they want something really immediate. And they get a little education on understanding why doing it in the way that we do it, in the end will benefit them long term and save them money”.

According to the half of the music branding companies the size of their clients’ business was directly related with their concrete knowledge about the existence of audio and music branding. According to *Zanna Sound* “one of the reasons is that bigger companies have more money to spend and in consequence have a more mature branding and marketing strategy”. For *Splatter*, it is a matter of mentality. The majority of the brands that they work with “are forward thinking international brands that want to take global creative and localize it” whilst for *Fry* is a matter of commitment. When a company is more committed to their brand in terms of the music, the first and firmest thing is to have custom music profiling.

Restaurants

All of the restaurants and bars interviewed gave a similar answer regarding the value of the music in their establishment; it should be something nice to hear in the background without disturbing the clients. *Lagerhuset* explained that their food menu offers international food but “it doesn’t really matter what kind of music we play, I don’t think it really conveys any message to customers about us being an international restaurant because we play international music. We just play music because people can relax to it”. *PCBar* argued that “during the night time I want to play more lounge music so you can sit and talk with your friends and don’t really pay attention to what’s playing since is like background noise”.

Music profiling

Audio and music branding companies

All of the interviewees talked about the process that sound and music branding agencies follow to establish the sound identity of their clients and enhanced the importance of following a method. In their opinion, understanding the importance of being congruent with their music profile and keeping that as a long-term commitment plays a key role. “You have to do the same all over and over again to really give a music identity to your brand. Mostly those [small] restaurants are playing music depending on who are working today. It's maybe the waitress' favorite music today and then it changes. Next month is some other kind of music. But if you want to really establish something you have to think longer than that” explained from *Radja*.

Why Do Birds explains that most companies think about music as a project. They ask how long it will take for the company to develop their sound logo or corporate music and think that once is provided the process is over. “Companies have to learn that it's an ongoing process, to keep the implementation going. Otherwise it was a waste of budget to just produce something and then don't use the power behind it”.

Agencies interviewed also explained that they work differently depending of the strategic motive behind the brands. There are several options, from a new company starting from scratch to an older brand trying to get people to think of them in a different way. Workshops and meetings with the client play a key role in the development of a strategy. *Audiobrain* explains that they “start analyzing their corporate communication and we have a series of tools to try to get them to focus on what makes them different and what makes them special”. *PCMUSIC* comments the importance of knowing the background of the business “where did they start, what kind of clients they have. Getting to know the restaurant in a personal level”. *We Sound* mentions the importance of finding the needs and challenges of the brands in order to fix the objectives and strategies. *Why Do Birds* remarks the analysis of the function behind the sound that they use in touchpoints and *Radja* argues that touch points can be both marketing channels but also physical places in buildings.

According to *Zanna Sound*, the same way that every human being has their own fingerprints, the same happens with brands: each brand has their specific history and something that is different from their competitors, even if it is in the same segment. That is the starting point to find how music can help to express the differentiation.

All of the companies mentioned the importance of working directly with the decision makers of the companies. For *Zanna Sound*, it makes the project stronger and facilitates the work of the people directing the workshops. *Why Do Birds* and *Splatter* argue that the

bigger the company, the higher hierarchy levels. “Sometimes it can take over a year until everybody agrees on something”, adds *Why Do Birds*.

Visiting the physical environment and observing the consumers is also an important part of interpreting the brand. For instance, *Fry* works with energy balancing: “finding the levels that we are looking to have for the client experience and then we start looking for genres”. Same as *Zanna Sound*, that tries to “understand the experience that they want to provoke. Certain styles are more in tune with brand’s personality and this makes a total difference when the clients are inside of the store”.

Restaurants

Six out of the seven managers interviewed choose the music played in their restaurant based on the music they like and hear. When the managers were asked if the type of music played in their restaurants matched their business, five of the interviewees answered that they did not know. The other two, *TomToms Burritos* and *Basque*, answered that it did not. They remarked that it matched their clientele more than the business itself. *TomToms Burritos* explained that they offer mexican street food but their clientele is not into “mariachi or latino pop charts”, instead, they are more “hipster” and for that reason they try to play music to appeal to their customers. In the case of *Basque*, the manager explained that music does not match the basque culture.

Regarding the motivation to choose the music, *TomToms Burritos* argued that they refuse to play mainstream music and try to play “low key, alternative” to match their clientele’s “chill and relax” attitude. In the case of *Basque*, the music it is ideated to offer the clientele “the feeling of being in some other country far away [...] my hope is find the music that can progress that feeling even more”. In *Oceanen* they play “soft and comfortable singer-songwriter” music since “one of the big reason to go to the cafe is to go with a friend to talk. So it has to be something that it doesn’t disturb the clients”. For *Brygghuset* the motivation is to evoke reactions on people and bring back good memories. “You get tired in a week of the music that is playing these days. You hear the same songs all the time. I like to play older music, that kind of music is timeless, you can always play it and it brings old and good vibes”. In the other 3 restaurants, the use of mainstream or more popular music was based on the variety of customers and their preference for different kinds of music. According to *Henriksberg* “if you keep it mainstream you don’t offend anyone, so to speak” and for *PCBar* “mainstream music it’s easy to listen to. Songs that are on the radio at the moment and that everyone can like”.

Activation

Audio and music branding agencies

Once the strategy is set, is time to create the sonic filter or lense that will guide the selection of music. This filter guides the common feeling that the songs will have “and it's very rarely that they're all rock or all pop. It's more what the brand stands for and wants to communicate it can be friendly, reliable or whatever” according to *Audiobrain*.

Music branding companies are in constant contact with record labels of all sizes that will service music almost daily and keep them updated with their latest releases. In addition, they use different blogs and platforms to get to know music. “We're on the ground getting involved with other promoters, with Djs, with bands” explain from *Splatter*, “going to concerts, looking through blogs and small sites where new music is emerging is a big part of what we do. You have to put your feet dip in the soil to be part of the movement. That's the only way you can really participate in what's now and what's next” added from *Fry*.

The creative process to choose the song varies from company to company. Five out of nine of the companies interviewed use tools to adapt existing playlists to the customers' needs and others start from scratch. In the case of *We Are The Supergroup*, they start as wide as possible:

“I feel like we are sometimes squirrels, we grab all the music we can. Store it away and then one day it will be used. [...] Between all of us we have millions of songs on our computers, playlists and all those things. And I like to think that I know a lot of them, so I basically wait for the brief to come out and focus on the keywords and the inspiration or the feeling. [...] And then I just basically start putting it all together on a playlist. I throw everything that even has a tint of fitting in. [...] And then I start going through it and just listening to the playlist and deleting anything that I don't think it makes that cut and then I keep widening it down pretty much”.

Why Do Birds, *Audiobrain*, *Splatter* and *Fry* agree on the importance of creating central narratives and brand attributes to communicate that with music. The experience and competences of music supervisors play a key role in that process. In words of *Fry*, it is a “very transparent journey and it's kind of based a lot on experience so we are rather fluid in the way we arrive at the point where we say ‘ok, this is where we want to be gender-wise”.

All the companies agreed on the balance of skills that a music supervisor should have in order to match a brand with its sound. *PCMUSIC* explained that a music supervisor needs to have passion and a deep knowledge about a large amount of music from all around the world. But music knowledge is not enough as many companies explained, *We Are The Supergroup* argued that liking “what someone is playing on their iPod playlist or on the record player at their house because they do have a good taste in music” is not enough to

curate music since “there is a lot of people that have good taste in music that can't see how a song will fit”. *Radja* describes it as a “wild knowledge” and argues that “you can learn a lot in schools [...] but you have to really understand the thing that music communicates and what kind of environment you are building with different kinds of genres”.

Zanna Sound describes it as “someone who is really well trained in marketing, specifically in branding, who understands and has a very good hearing”. *Splatter* remarks the importance of the communication skills, the person needs to “to understand what the client wants and what their needs are. But on the other hand you have to be able to connect with the music industry and with the people making music in a way that's not going to alienate”.

Apart from the creative side of the job, all of the companies mentioned the technical part of it. In the musical field *Audiobrain* argued the importance of knowing all the existing audio formats and staying updated with all the available tools. Collaboration with experts of other fields is also an essential part of their job in order to have an interdisciplinary team that can adapt to the various necessities that their clients' might have. All of the companies interviewed had contact with acousticians and sound installation partners in order to offer personal acoustic treatments.

Small restaurants

In four of the seven restaurants interviewed, apart from the person in charge of the music, other employees and staff members could modify the playlists and plug their personal electronic devices to play music.

One out of seven restaurants had a single playlist with around 500 songs played in shuffle and loop, the other six restaurants used more than one playlist. From the six restaurants using several playlists, five made the playlists based on the mood and play them in shuffle mode whilst one restaurant made them to play the songs in order based on the progression of the mood.

The number of songs on each playlist varied from 100 to 500. Two of the restaurants pointed the difficulty of curating the songs themselves, from *Henriksberg* argued that “it's easy to pick 15-20 songs that you like for a playlist, but that's an hour of music and no matter how much you shuffle it, people start recognizing it”. From *PCBar* agreed saying that it is “easy to think about 20 songs, but if you work eight hours you have heard that playlist maybe five times and you get sick of the songs and need to change them all the time”. Six of the seven restaurants admitted that they get tired of playlists and songs that they play. Four of those restaurants pointed saturation of the music played at work as a reason to find and play other user's playlists. One manager found music stressful due to the saturation and the refused to hear any music out of the working hours.

All of the restaurants would change the volume of the music based on the number of people in the establishment and time of the day. Three out of the seven restaurants had control of the zones in which to play music and one company checked the decibels of the music played on regular basis.

Regarding the relation between the music and the clientele, one manager explained that the restaurant played a type of music to attract the kind of clientele they wanted and argued that they “don't wanna play hip hop cause it attracts the wrong kind of customers”. Five out of the seven restaurants would change the music based on the profile of the clientele and especially if the clients are older. From *Brygghuset* argued that if there is older clientele the music would be “something like the Beegees, to give them a flashback from their good times”. All of the restaurants take day partying in consideration when playing music, especially playing softer music during the lunch or dinner and more up-tempo during night time.

Measurement of the impact

Audio and music branding agencies

According to the agencies interviewed, the return of investment (ROI) is a big concern for companies. *Zanna Sound* explains that “the most common question is, ‘how can sound branding improve our results and make us make more money?’ and this is a hard question because is almost impossible to prove it with researches”. *Radja* adds, “in the ad agency world there is a lot of research done to see how much more they sell after a campaign but in the PR world, and we are part of the PR world, you can say that is more brand building, it's more about brand recognition and the feel for the brand”. *Audiobrain* emphasized that in the following excerpt:

“We can measure a return on investment based on parallel audio or music budgets from previous years and then once they start sharing assets or leveraging out we can show them bottom line reduced costs. Which is great but (...) the real value comes in the customer recognition of the funds. In the customers favorable feedback of the sound. (...) If we do focus groups and we've done a kiosk for example, and they say ‘oh now the colors got more vivid’, the colours didn't change at all, it's just that they had the right sound to it. That's stuff it's very valuable to our clients, especially nowadays that they are connecting with their audience”.

On the other hand, even if there are evaluation methods to measure the achievement of objectives, “the client doesn't want to spend extra money for this kind of research, which is a little bit sad but it's the reality” in *We Sound's* words. However in words of the agencies interviewed, despite the lack of concrete numbers, their clients know that the music will

create a more pleasant environment and “if their environment is more pleasant and it is closer to the brand, people will stay longer. And when clients stay longer they will buy more” according to *Radja*.

Small restaurants

All of the managers interviewed mentioned that it was common to have customers approaching them to ask about the songs or artists that they were playing. When asked about the client's' satisfaction regarding the music, five out of seven restaurants answered that nobody had complained and one restaurant argued that many of their customers congratulate them for the music. In case someone would ask for the title of the songs, they would say or write down the name of the song, show the screen of the device from which the music is played or ask the customer to use Shazam, an application for cellphones that identifies the name of the songs played. In order to use this application, the cellphone needs Internet connection. It can also work offline, saving the search and showing the result once the cellphone is connected to the Internet.

Profitability and costs

Audio and music branding agencies

Not all sound and music agencies agree on the company size that their clients should have. Six out of the nine companies indicated that they work with all size of companies whilst other two had a concrete limit of stores that a business should have to work with them. Two companies did not see the profitability of working with small companies, going through the whole process of finding the music identity is not economically worth it for them if it is only for one or two stores.

When asked about the advantages of using music branding in small businesses, one agency indicated that there is no need for music branding agencies in every section of retail. Often, small companies cannot afford the costs of music branding. Eight of the other companies highlighted the positive impact that music can have on small brands. *Audiobrain* explained that smaller companies “don't have huge budgets and sound is a good way for them to save on cost by having a central point of view so that it becomes a brand theme and fits the structure to it [...] it also makes a more unified brand communication for them”.

The price of professional music branding services are more expensive than generic in-store music streaming services. In exchange for the higher price, all of the companies agreed on pointing the quality and custom choices. *Fry* explains that the music is “hand pick music, song by song to create an experience for instance your hotel or your restaurant.

And that is obviously more time consuming and a little bit more expensive”. *Zanna Sound* underlines the intelligence behind the service they provide as the main differentiation:

“Definitely we charge a lot if you start thinking compared to what Spotify, Deezer or these other tools cost. But I think there is something that Spotify can't substitute or replace which is the human being's smartness, intelligence. We have an intelligence, a strategy behind our musical choices so it's what we offer more than the other tools”.

But budget is not the only reason why small companies refuse to use external music branding services, for some businesses, music is a way of representing their individual identity. *Radja* mentioned the example of small restaurants that are often attached to few persons working there. In these small restaurants there are creative people working, like chefs, that will have “their own relation with music and will think that they have the best taste. [...] It's always a thing if we put up a framework around their sound, they want to add their own feel to it [the restaurant], they listen to their music and they want to choose their own sound because they want to, maybe present themselves as well”.

Small restaurants

When asked if they would be willing to pay for a professional music branding service, from the seven managers interviewed, four refused to have someone else picking the music, one would not mind as long as it would not cost more than 50 SEK, more than the price of the current music streaming service, and two companies were very positive of paying for it.

Among the ones that did not want to pay, some pointed that it is a fun process for them. For some of the managers music is a big interest in their life. Others, like the manager of *Basque*, are musicians who have played in different bands and are passionate about it. From *Brygghuset* it was argued that music is more personal when the manager and the staff pick the songs. The age difference of the employees, from 22 to 40, makes them have bigger knowledge of different genres and styles to pick music from. From *Oceanen* it was a matter of identity, the manager explained that “in the same way that I choose what I want to sell and all the other stuff, it's the same thing with music, I choose what I like. I don't want to use somebody else's playlist”.

On the other hand the restaurants willing to pay for the music branding services if as a result customers would have a more pleasant experience and be also reflected in the sales. *Lagerhuset* explained that they would be willing to pay a “higher and better price” depending on “how much time and effort are they [music branding companies] willing to put. And also the effects of it, if they can show me that it increases sales or the times that people spend in here from 2 hours to, let's say, 4 hours”. According to the manager of

Henriksberg it is important to play the music that makes people “want to stick around and have a good time” and made the following reflection:

“If people have a good time they stay longer, but it's not just about making them stay. You want people to be happy when they are at your restaurant and if you can contribute to that through music even better. But of course, you want people to stay as long as possible and in better ways. And if music is so good that actually people want to come here just to hear it, that would be amazing. I am paying two premium accounts and I could easily pay 5 times that a month”.

IT

Audio and music branding agencies

The IT part also plays a fundamental role in music branding, *Radja* explains some of the challenges they confront equipment-wise:

“When we are working with big chains with a lot of stores, we need to have systems that can collaborate with their back office system and their IT solutions. And that could differ a lot from different kinds of companies. A lot of companies have really old systems from the 90s and they don't want to buy new ones because it is a lot of money. So you have to get your own equipment to work with really old IT solutions”.

All of the companies interviewed offering music branding services had developed their own software to stream the music directly to their customers. Using their own software instead of a third party's has the ability to sculpture the music experience uniquely. The possibilities of the softwares are various, some of them work with moodboards to choose the intensity of the music depending of the desired feeling. Others, like the *Fry Tuner* by *Fry* vary the functionality of the software platform based on the category of the business; hospitality, retail or public service.

Music branding companies are in constant contact with their clients through the software interfaces and with the built-in-feedback options can collect data that will help them shape better their music suggestions based on their customers' activity. Another benefit that the music branding softwares are the possibilities of day-partying playlist programming. Some music branding companies like *PCMUSIC* schedule different playlists for the times and moods that their client might have such as “morning playlist from 6am to 12pm, afternoon or lunch playlist from 12pm to 5pm, early evening/happy hour/dinner playlist from 5pm to 9pm and evening/late night playlist from 9pm to 2am or until they close”.

The available songs are picked from databases that include years of music collection. Four of the companies interviewed mentioned as a strong point over other general music streaming services, the availability of more music from the underground and indie scene in

addition to the mainstream music. Music branding is a new and active channel of promoting bands according to six out of nine agencies interviewed. The majority of the companies mentioned technology as a key role for the future of music branding. *Audiobrain* explains that “brands are becoming more of what they sound like because of all the new technology [...] they want to touch their customers on many more different levels than just an ad on TV [...] technology provides tremendous opportunities for a lot of different people, it’s not just about who is on the major labels anymore”. From *We Are The Supergroup* argued that music branding is moving towards transmedia narratives. For them “a lot of things interact more than just the show or the ad like the activation across couple of different platforms. [...] We are going to start seeing supervision falling into a lot of social platforms”.

Small restaurants

The nine restaurants interviewed had Internet connection and seven of them had Wi-Fi available for customers. Four of them played the music from a tablet, one played from a tablet and the computer, one played from the tablet and the phone and one played from the computer and one from the phone. Eight out of the nine restaurants used the chosen electronic device only to stream the music and the other one used it to do accountability. All of the restaurants used the same software for the music streaming service provided from the same company.

All of the restaurants interviewed had Facebook profile, six out of seven had Instagram account, three had Twitter account and three had their own website. Facebook and Instagram were the most updated social networks in contrast to Twitter that was rarely updated. Regarding the restaurants with personal websites, it consisted on a landing page with contact information and the social networks.

Future of music branding according to audio and music branding companies

Splatter believes that companies are already being aware of the need of selling their brand in ways that will approach their target group in a more meaningful way. “Young people know what's going on, they know they're being marketed and they're less gullible now. So the brands are going to have to come up with better alignments and deeper meaning and messages. That's gonna really strike people and compile them in a less superficial way”.

Five of the companies interviewed underlined the importance of getting back to stories and driving narratives that align with the needs of the people that they are trying to sell to. *Zanna Sound* remarked that “at the end, people want to be happy. [...] And if they are

happier in a store than in the other, they will tend to go more there. And the clothes and the products will also have a different taste for them cause inside of that store they are happier. So I think that's the point. How in a consistent, honest and sincere way we can provide happiness to people. That's for me the future of sound branding. To provide happiness to people”.

The companies interviewed have a variety of opinion regarding the future of music branding. From *Why Do Birds* claim that audio branding in particular will not experience “a big jump [...] I think it will be a little more important but I don't think there are that many famous audio branding cases out there [...] because as soon as something is really, really excellent, that people are aware of they say "oh we need that for our company". The other eight companies interviewed companies agreed on audio and music branding being a bigger part of the agency world in the future but not easy to predict when or how fast. All of the companies interviewed pointed that the notion and change of attitude towards music from just being a distraction to actually being an attraction and a really strong tool in developing and enhancing a brand is crucial to have the market explode. The availability of numbers, statistics and empirical studies would also help to “make more managerial decisions lining towards qualitative decisions rather than the cheap quantitative ones of using generic music”, in *Fry*'s opinion.

Discussion

In this chapter the results are discussed based on the background literature. The value of music branding according to professional companies and the criteria that small restaurants follow to choose their background music are explained. Other factors that influence the previous points are also presented. The chapter concludes with the limitations of the present paper.

Value of music branding

Everything a brand does sends a message to its customers, whether they want it or not (Watzlawick, 1967). Audio and music branding are aware of it, and defend the holistic brand communication instead of mainly focusing in the visual part. Answering the first research question related to the value of music as an strategic tool, audio and music branding companies considered that music helps brands to build unique experiences aligned with their strategy and benefits the brand awareness and position in customers minds. This matches Beverland et al.'s (2006) study results; when the right music is played and other in-store variables are perceived as positive, the brand is perceived as a whole package. The strong relation between music and emotions, makes the customers perceive the elements around in a different way (Hecker, 1984), but for this to happen, the condition of congruence and fit of the music is fundamental. According to the music branding agencies interviewed, music does not only help to create different ambiances or differentiating one brand from another, it has value. Depending on the brand's strategy, this value will be perceived as a distraction or an attraction. The value of attraction is related to the different studies (Garrido & Schubert, 2013; Zentner, Grandjean, & Scherer, 2008, Sloboda & O'Neill, 2001) focused on the reward behind listening to music. The importance that it has in order to engage a more meaningful communication between brands and customers can be explained with Zander's (2006) research, in which results indicated that under the condition of fit, music can convey information about the brand that words cannot.

Restaurants do not use the full potential of music

The awareness about the importance of music in physical spaces is increasing in small restaurants but they do not think about music branding. Most of the restaurants knew the importance of playing music that fit their business (Macinnis & Park, 1991) and understood the relation between the more time a client stays, the higher chances of spending more money (Anderson et al., 2012). Answering the second research question referred to the criteria that small restaurants follow to choose their background music; managers of the restaurants confuse fit, indexicality and familiarity. The music choice on most of the

restaurants was done based on the owners taste and hoping that it will not disturb the clients. In their perception, music that is nice for them, played in their nice restaurant is enough to meet the fit characteristic. But as good as ones taste in music can be, the music profiling of a company is much more complex than that. As seen on studies analyzing in-store music (Sharma & Stafford, 2000; Dubé & Morin, 2001; Aaker et al., 2004; Kates, 2004; Beverland, 2005; Beverland et al., 2006) lack of fit has a significant impact for low-involvement subjects and especially if it is the first time that they meet the brand. Even if the music is considered not disturbing by the restaurants due to the characteristics of the different genres, this could have an involuntary bad effect in return. Going to a restaurant with the characteristics of the ones interviewed (see the average price of the restaurants interviewed in table1), is considered a low-involvement consumer decision. Low-involvement decisions are products or services relatively inexpensive and pose a low risk to the buyer if he/she makes a mistake by purchasing them (Tanner & Raymond, 2010). Based on the findings of Macinnis and Park (1991), lack of fit creates more negative emotions for low-involvement consumers. As an example, someone going to a nice looking restaurant with good quality of food, could feel a lack of fit if the music playing would be mainstream or did not match the expectations that the other senses projected (see Beverland et al., 2006; Dubé and Morin, 2001; Sharma and Stanford, 2000).

However, the lack of empirical studies proving a clear relation between positive musical environments and increase in sales makes small restaurants skeptic of paying for this kind of services. In contrast to the long and established visual identity tradition within brands (Feldwick, 2009), music is not considered such a clear profitable sense for restaurants. One the reasons for this differentiation can be based on the weight that restaurants necessarily put on the senses of taste and smell. These two senses, together with the sight, are the center essence of the business. When companies do not think in the bigger picture and the importance of customers' experience, music can be easily relegated to a secondary plane of filling the silence without disturbing the clientele.

High-familiarity does not lead into high-indexicality

Several restaurants mentioned the feelings that they wanted to evoke on customers. Some like *Basque* wanted to make the clientele feel like if they were in some other country. To do so, the manager picked world music songs that potentially could be unfamiliar for the client (Salimpoor et al., 2013). *Brygghuset* on the other hand expressed the will of evoking old good memories by playing old music, the reason to do so was the saturation of mainstream music these days on the radio and other emplacements. According to the manager one could easily get tired of the music played these days. In their opinion old music was timeless. The 'Beegees' were given as an example of the type of music used when the

clientele in *Brygghuset* was a little bit older. This example could be taken a contradiction. Probably, the exposure that we have nowadays to new artists is the same as we have had to older popular bands like the Beegees. The use of old music does not necessarily mean value or high-indexicality to memories (good or bad) (Macinnis and Park, 1991), it can simply mean high familiarity. Old songs could also be perceived as saturation and be ignored. The Beatles, The Rolling Stones, Michael Jackson, B.B. King and a long list of skilled artists' music is played everyday in radio stations of all over the world. The same reasoning that many restaurants gave regarding the lack of attention paid to mainstream music nowadays is applicable to many old songs. *PCBar* gave a very interesting approach to the perception of songs that were very popular in the not-so-far past:

“...the owner wants to play maybe, classic pop songs (...) but classics like pop songs from the 2005. Like they are not so old that they're good, they are just... old. They're not vintage or retro, they're just like... old. Like Lady Gaga and Britney Spears, no one likes that”.

The opinion about the old vs. new music issue is clear for the music branding companies. They apply the same quality principle to all kind of genres and eras in order to create music experiences that will add value and differentiation to the brand. *Fry* explains that it does not matter if they are profiling for “60s music, bossa nova or soul. It's just that instead of doing the archetypical Al Green soul songs, we would dig deeper and we would probably pick some of his songs but maybe the ones that weren't in the charts or that hasn't being exposed that much”.

Loss of identity

Some managers perceive music branding services in their restaurant as losing part of their identity. This thought could be considered inaccurate. Reports have shown (Salimpoor et al., 2013, 2011; Garlin & Owen, 2006) that our past musical experiences determine and can predict if we are going to like unfamiliar songs. It also shows that is more important that customers like the music than recognizing the songs. Based on that, we could change the perspective and set the restaurants as the customer of the music branding companies. If we do not focus on the reward that the restaurant owner gets from discovering new music, music branding agencies could be considered a rich resource of unfamiliar songs ready to be liked. The different softwares provided by music branding companies include built-in feedback options that help to sculpture the brands' music experience based on the client's review. Interviews with restaurants showed that their manager's (or person in charge of the music) exposure to music is limited and based on what they hear in other businesses such as retail stores. Music curators on the other hand, are researchers constantly in touch with sources of new music. Managers could have access to hundreds of songs specially curated

to fit in their business and at the same time they could choose which ones match their preferences or not (Salimpoor et al., 2013) and just play the ones that they like and which whom would eventually become familiar.

There is a wide research done around the emotional rewards behind listening to music (see Mori and Iwanaga, 2014; Hanser et al., 2013, Garrido & Schubert, 2013; Zentner, Grandjean, & Scherer, 2008, Sloboda & O'Neill, 2001). However, those studies pay more attention to the genre or type of music instead of having the ways in which that music is discovered as the main focus. Further studies could analyze specifically the reward of discovering new music and if it varies depending the context.

Music branding agencies and small restaurants do not play in the same league

As seen before, the lack of empirical researches proving that pleasant musical environments increase sales, make small restaurants skeptic of paying for this kind of services. However, despite that fact, one could say that music branding agencies and small restaurants play in different leagues. Music branding companies underlined the importance of the brand communication, congruent music identity and importance of the process and method to achieve the music profile of brands. But as good as all the previous sounds, only one of the music branding companies provided the exact amount that they charge per store curated. The rest of the agencies refuse to answer, said that fee would vary depending on the characteristics of the client or gave a very wide frame of prices. On the other hand, the direct competence, music streaming providers like Spotify, Deezer or Tidal have a clear menu of prices. Some like Spotify have recently launched a new line of services under the name of Soundtrack Your Brand and provide a more personal service to businesses willing to have more control over the music they play. It is more expensive than the normal license (which is only for personal use) but still gives the different fees in detail and leaves the door open to be contacted for special inquiries. This lack of transparency on the prices makes gap between music branding companies and small restaurants bigger. Agencies interviewed mentioned accountability like the number one concern for the companies willing to use their services. In addition, they mentioned the increasing awareness of big companies around sonic and music branding and the process of educating the people in charge of the brands about the benefits of music as a strategic tool. Managers of the restaurants have a very wide education background. They could be lawyers, cooks or have no studies. Therefore the communication styles and the technicality of the music branding agencies should be adapted to fit the variety of businesses. Otherwise they could

be perceived as an out of reach service for many businesses that could benefit and most importantly, afford, music branding.

Limitations

One limitation of this study could be that most of the music and audio branding companies interviewed are mostly specialized in audio branding, and music branding is a service they offer in their business. Audio branding focuses on original music composition and therefore, the starting point to find a brand's identity is different. Audio branding creates and music branding finds what they want. The sounds created by audio branding companies can be placed in several touchpoints, but it will have some sort of time limitation. A sound logo, a ringtone, a television commercial or a corporate video lasts a concrete amount of time, usually seconds or minutes. On the other hand, the music played in a restaurant lasts hours, days or months. It can always go on loop, but employees and frequent customers can easily identify a playlist that is too short repeating constantly. In this sense, audio branding companies can have a different approach to the idea of serving new music to their customers. In addition, customers of audio branding services usually have a higher profile. Not all the companies have media content to place a sound logo or hold a conference that needs specific introduction music. In the contrary, the vast majority of businesses, no matter their size, play music in their commercial spaces. As a result, this can influence the relation that audio branding companies offering music branding services have with small companies like restaurants.

Another possible limitation of the study is that the restaurants were only recommended by students, and this can thus have influenced the selection. Students often go to similar places based on clientele and prices adjusted to their budgets. It is possible that the findings would have looked different if more expensive restaurant had been interviewed.

Conclusion

This study identified the factors that professional music branding agencies take into account to defend the value of music branding. When music is aligned with the strategy of the brand, it builds unique experiences for the customers and helps the brand differentiate from other companies. Fit and congruence are the main factors that professional agencies underlined to meet the attracting value of music branding. Regarding small restaurants, the awareness of the importance of the music is increasing but they do not think about the value that music has as a strategic communication tool. Neither they have a holistic brand communication. Managers choose the music based on their own taste and assume that it fits their business if customers do not complain. There is a lack of congruence in the style played due to the open access that employees have to change the music. Most of the restaurants defined their music as either mainstream or alternative music. In both cases, the purpose of the music was to have background music that would not disturb the clients. Mainstream music was pointed as the right style to play when the clientele is varied. Indexicality and familiarity are often confused; popular songs are believed to evoke past memories and be more liked by the customers.

Due to the lack of empirical studies proving a clear relation between positive musical environments and increase in sales, small restaurants are skeptic of paying for music branding services. Audio and music branding agencies do not have a fixed rate for their services, in contrast to their direct competence: music streaming providers. This creates a gap between music branding agencies and small restaurants, that can perceive this lack of information as an out of reach service.

The majority of music branding agencies expressed the importance that technology will have in the future of music branding and in the way that companies will approach their customers. However, even if all of the restaurants interviewed had an average of three social networks account, they did not update the content so often and expressed that it takes too much time to create content. Future studies could focus on the relation between music and transmedia, role of music in social network interaction with customers or devices that customers use to search and listen to music (see Krause, North & Hewitt, 2015). Additional studies are recommended analyzing the reward that subjects experience discovering new music and if it varies depending the context.

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Appendix

Interview questions for audio and music branding companies

- When was the company created?
- How many employees does the company have?
- Which services do you offer?
- What is the main activity of the companies you work with?
- What size do they have?
- Where are the companies from?
- What does music branding mean for you?
- How do you think that music helps to communicate the brand?
- What kind of competences or skills does a person good in music branding have compared to someone with music experience?
- How is the process of getting in touch with companies until you reach an agreement of working together?
- What is the companies' awareness regarding their sound, or in which stage are they?
- What are the most asked questions?
- What are the factors that discourage the companies when an agreement is not successful?
- What is your methodology to establish a company's music identity? From the moment that you have the agreement until the job is done.
- How long does the process take?
- Can the results be measured?
- How long can it take to see results?

- How do you see the future of music branding?

Interview questions for small restaurants

- When did you open?
- Number of employees?
- What kind of food do you offer?
- What is the average price of the menu?
- How would you describe your clientele?
- How long -more or less- do customers stay inside your business when they buy something?
- Do you have social networks? Which?
- Who takes care of them?
- Do you have an Internet connection?
- Have you worked with any communication/advertising agency to supervise your communication?
- Which device do you play music from?
- Do you use this device for other things while the business is open?
- Do you have any other electronic device on your business? (such as computer, tablets, MP3 players, TVs, music equipment etc.).
- How would you describe the volume of the restaurant?
- Do you ever vary the volume? Based on what?
- What kind of music do you play?
- Why do you think that type of music matches your business?
- How do you think your customers perceive your business based on the music?
- Do you change the music depending on the time of the day?
- Do you use playlists?

- How often do you renew the music?
- Do customers give feedback about the music?
- Do you ever get bored of the played music? Why?
- Do staff members complain about the music? Why?
- How do you think that music influences the experience of your customers in your restaurant?
- Would you consider using professional music branding services? Why?
- How much per month would you be willing to pay for having a professional music branding service?