

Audio Branding Barometer 2010

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Audio Branding Barometer 2010 - Overview

This survey was carried out by the Audio Branding Academy in September 2010. The aim of the survey is to gain valid market data about the audio branding industry.

The results shall provide transparency and be a basis for decision making for both suppliers and demanders of audio branding services.

Agencies from 13 countries had participated in this year's study. Participation was limited only to audio branding suppliers and controlled by randomly generated passwords.

A documentation of the survey will be included in the Audio Branding Academy Yearbook 2010/2011 to be published beginning 2011.

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Survey Profile

Population:	All professional suppliers of audio branding worldwide
Sampling Method:	Multilevel online research of all suppliers of audio branding. The invitation to the survey was sent to 126 agencies
Sample:	32 decision makers and authorized representatives of audio branding suppliers took part in the survey (n = 32)
Data Collection:	Online questionnaire with controlled access
Survey Period:	September 2010
Research Institute:	Audio Branding Academy, Hamburg, Germany

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Contents ABB 2010

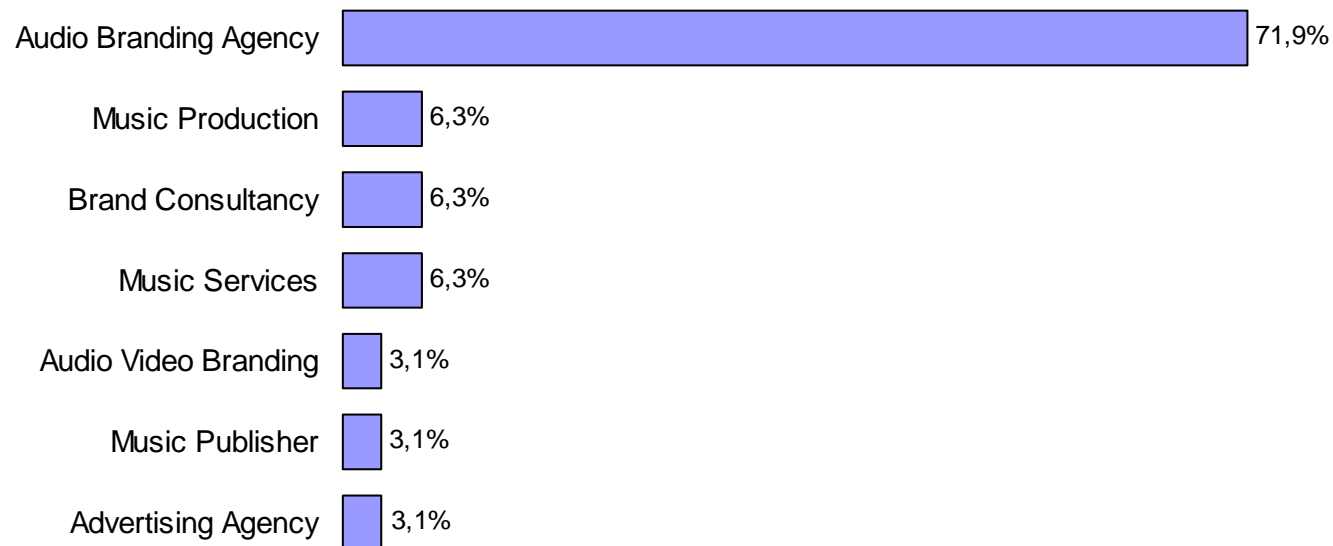
1. Company Profile
2. Revenue and Clients
3. New Business Projects and Pitches
4. Trends
5. Terminology

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Kind of Agencies

Question: What profile does your company match?

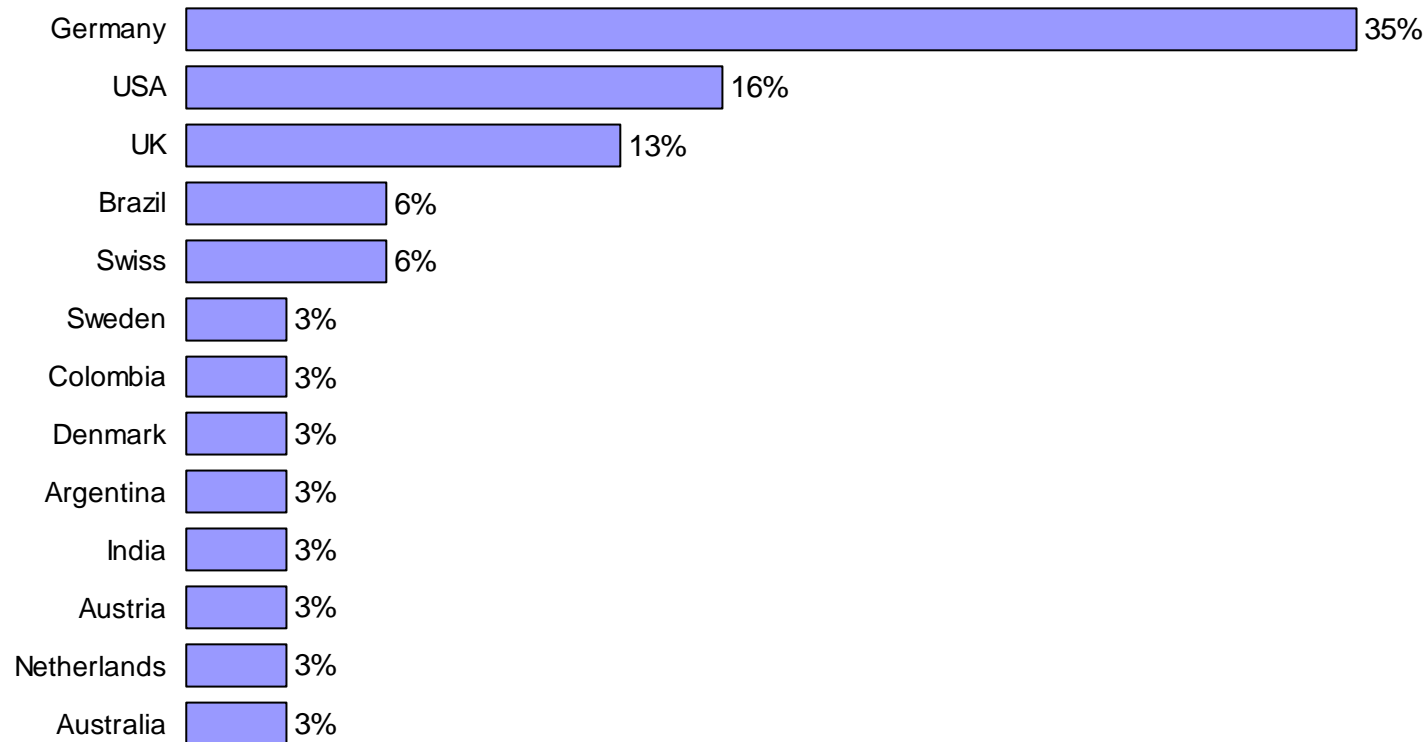


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Locations of Agencies - Part 1/2

Question: Where is the company located?

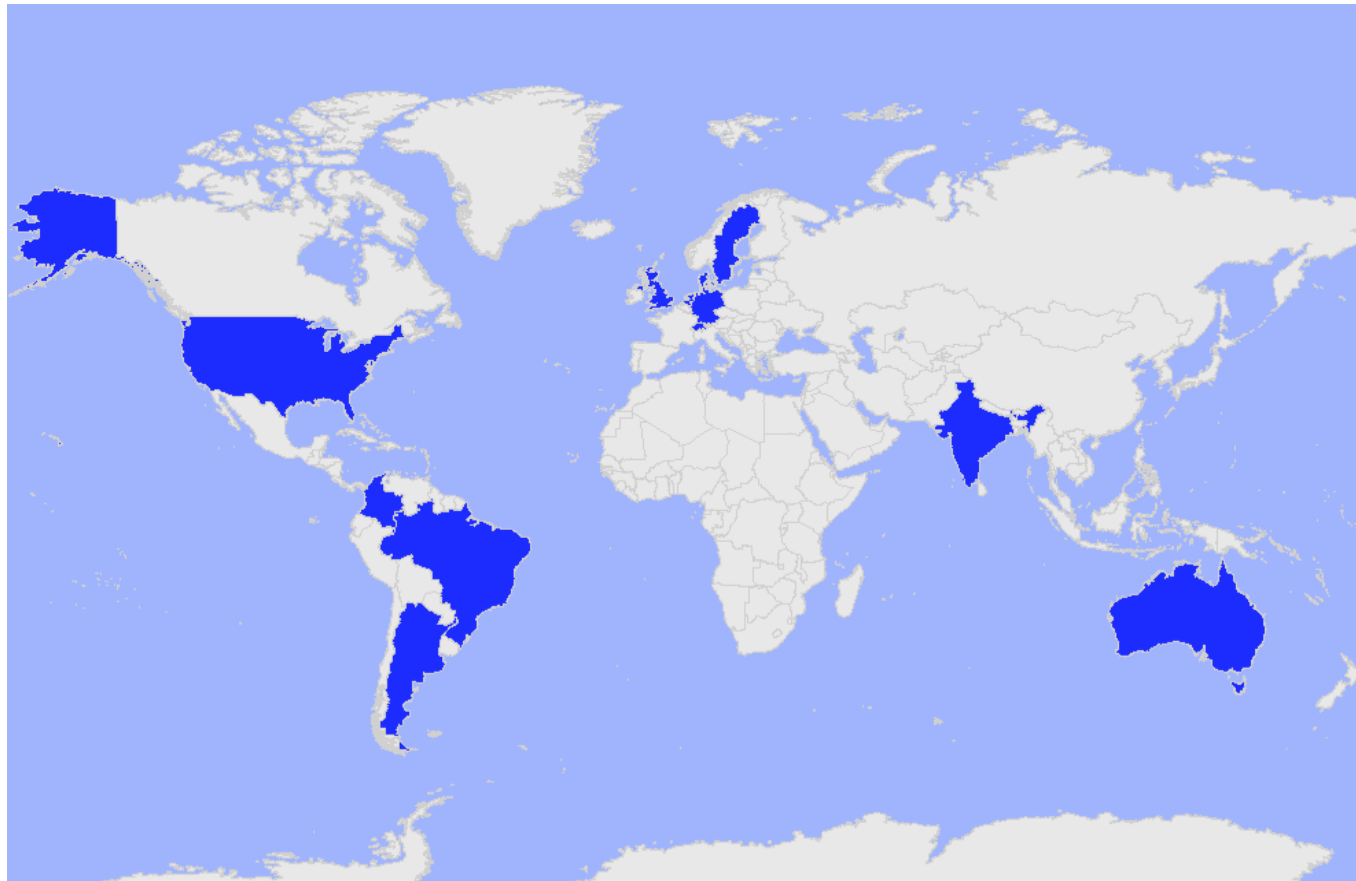


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Locations of Agencies - Part 2/2

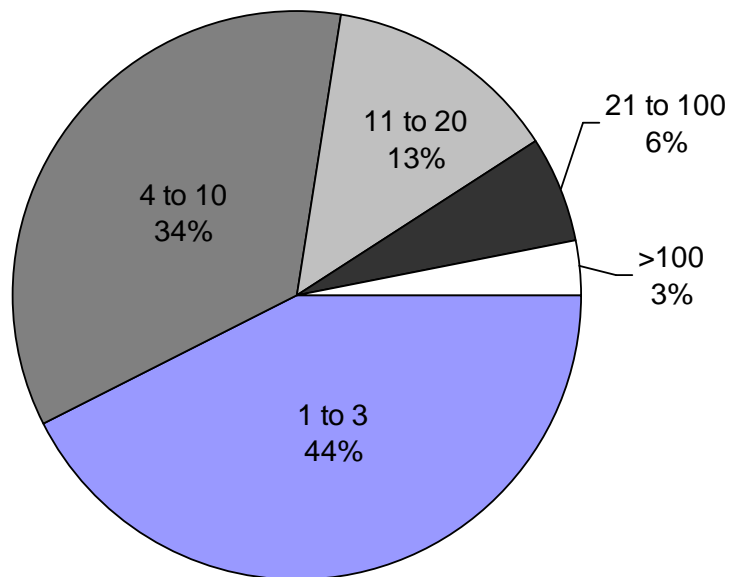
Question: Where is the company located?



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Number of Employees

Question: Current number of employees in permanent position?



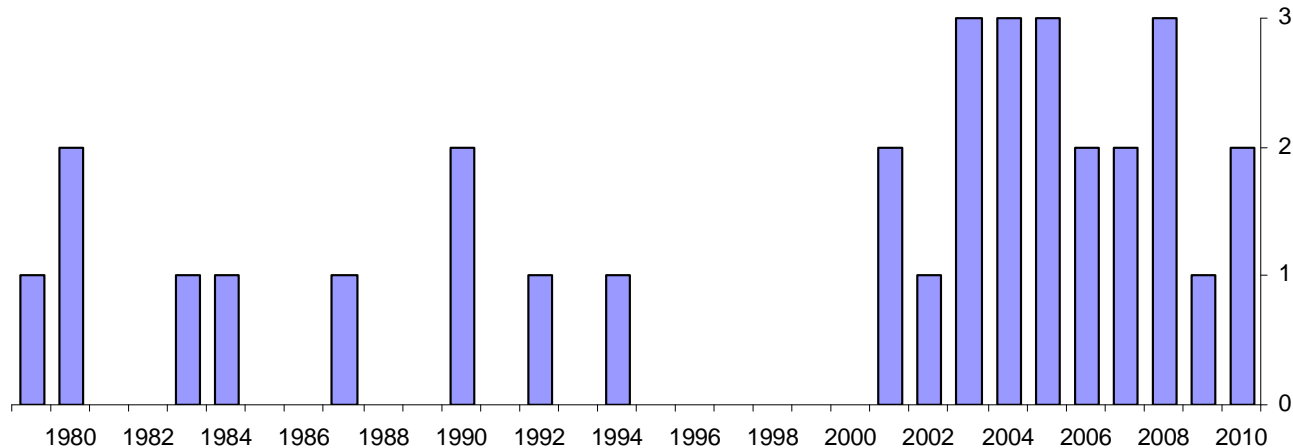
Audio Branding seems to be a business run by smaller specialized agencies. The big players are not greatly involved yet: 78% of the agencies have less than 11 employees, 13% between 11 and 20 employees.

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Year of Foundation

Question: When was the company founded?



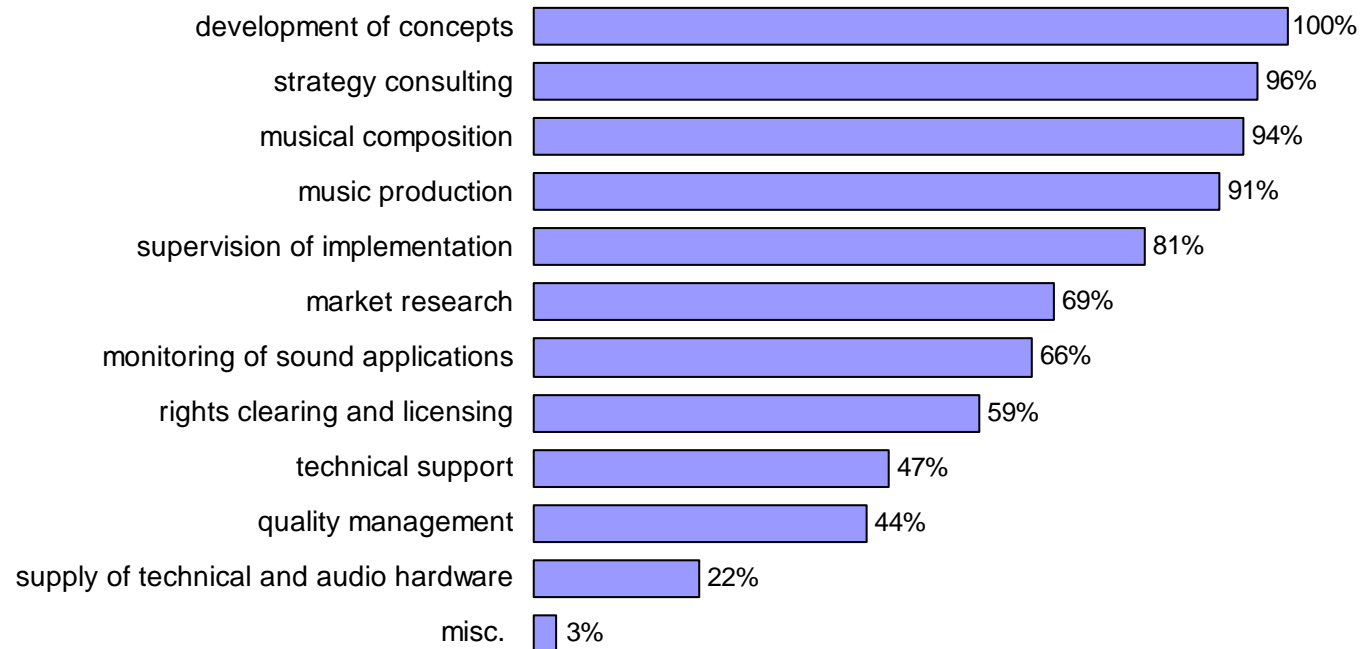
69% of the agencies were founded in the last 10 years, after a „gap“ in the late 90's. It's a quite young business.

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Services Offered

Question: What services does your company offer?

(100 percent means all agencies offer this service)

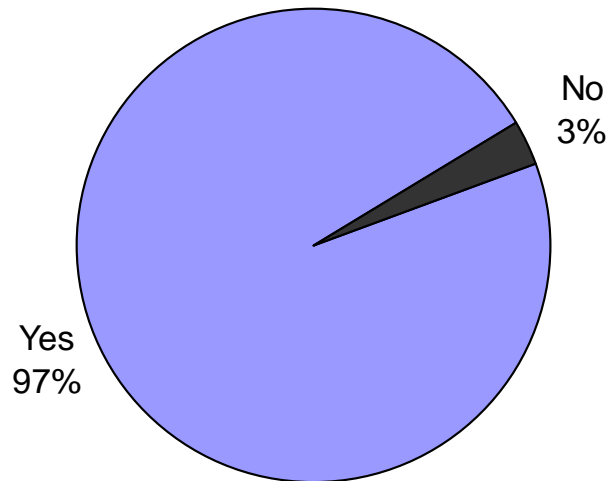


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Strategic Planning

Question: Does your company offer comprehensive strategic planning?

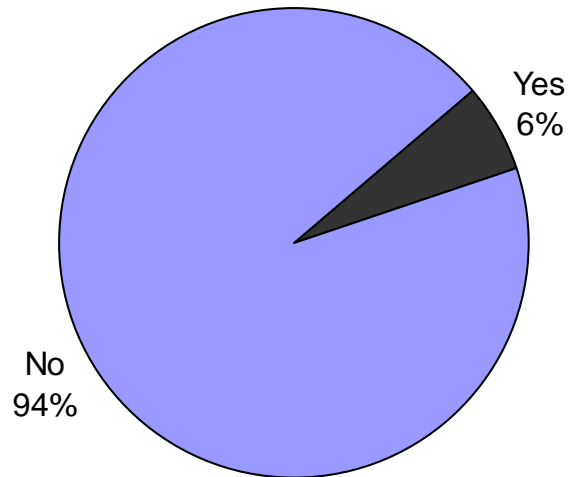


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Independent or Part of an Agency Network

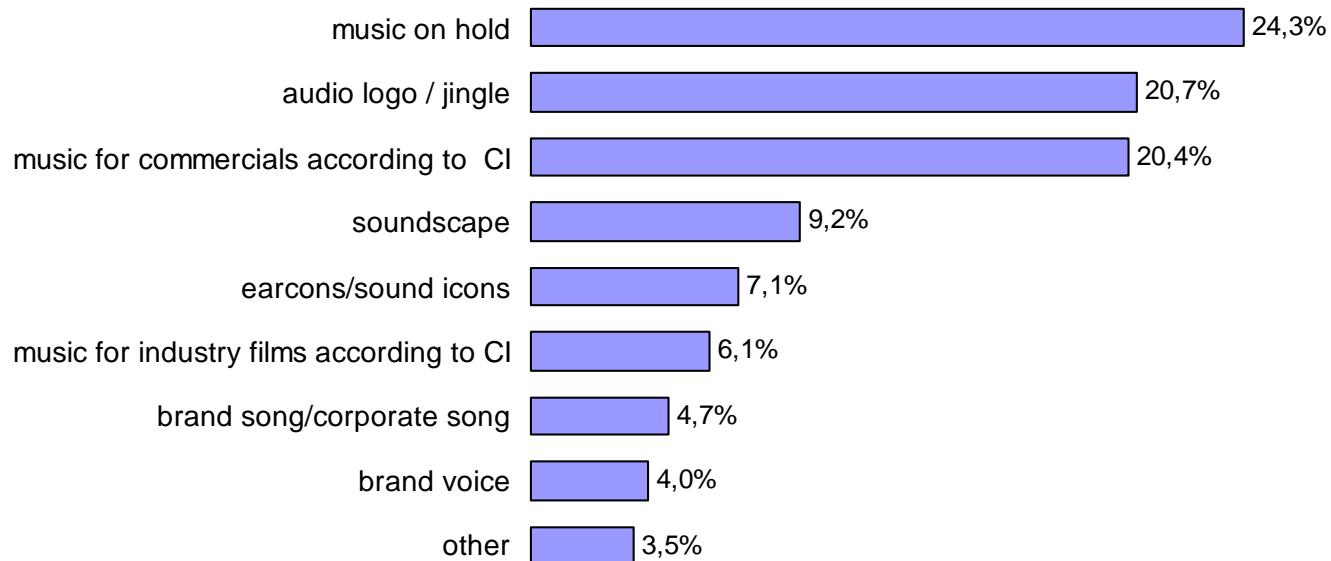
Question: Is your company part of an agency network?



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Share of Delivered Audio Branding Elements

Question: How many of the following audio branding elements did you deliver in 2009?

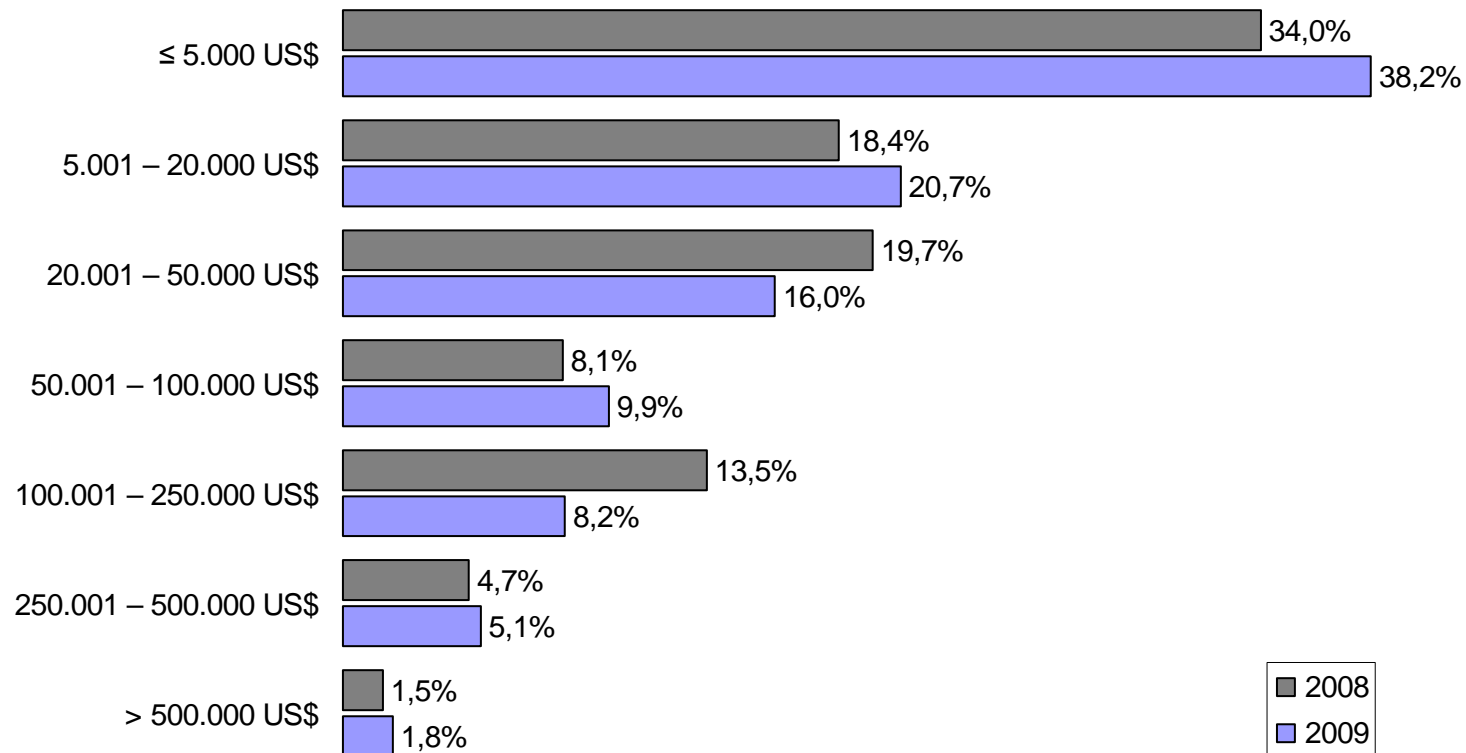


Sounds for phone waiting loops, audio logos/jingles, and CI-compliant music for advertisement spots are most frequently requested.

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Budgets of Projects

Question: How many client projects according to budget did your company accomplish in 2008 respectively in 2009?

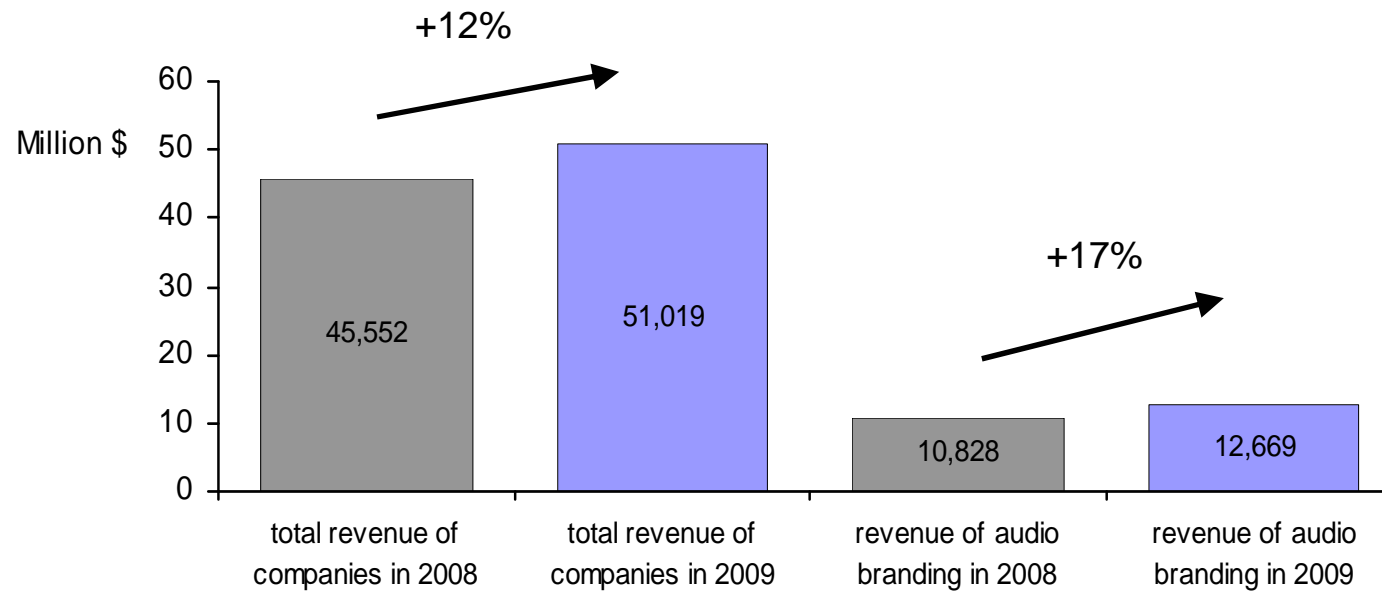


1US\$ ~ 0,76€ ~ 0,64€

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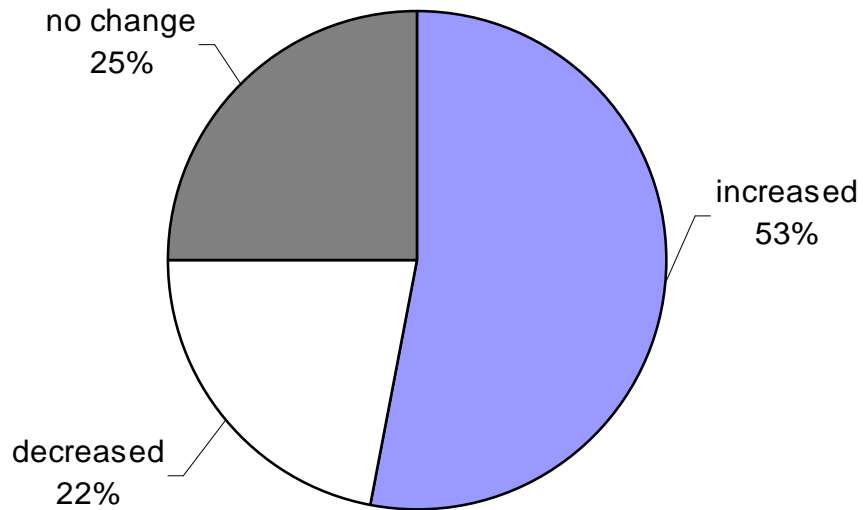
Comparison 2008 to 2009: Total Revenue and Audio Branding Revenue



1US\$ ~ 0,76€ ~ 0,64€

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Change of Revenue of Audio Branding from 2008 to 2009

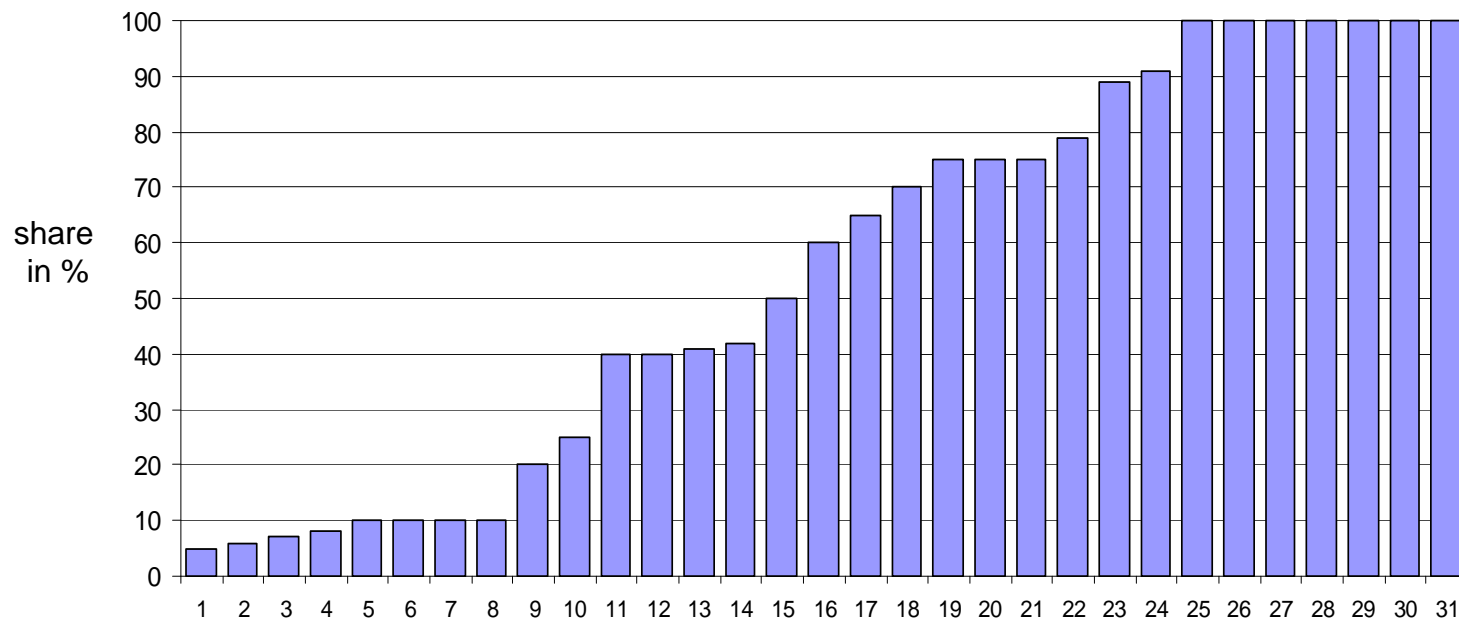


53% of all agencies could increase their audio branding revenue.

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Revenue from Audio Branding Compared to Total Revenue

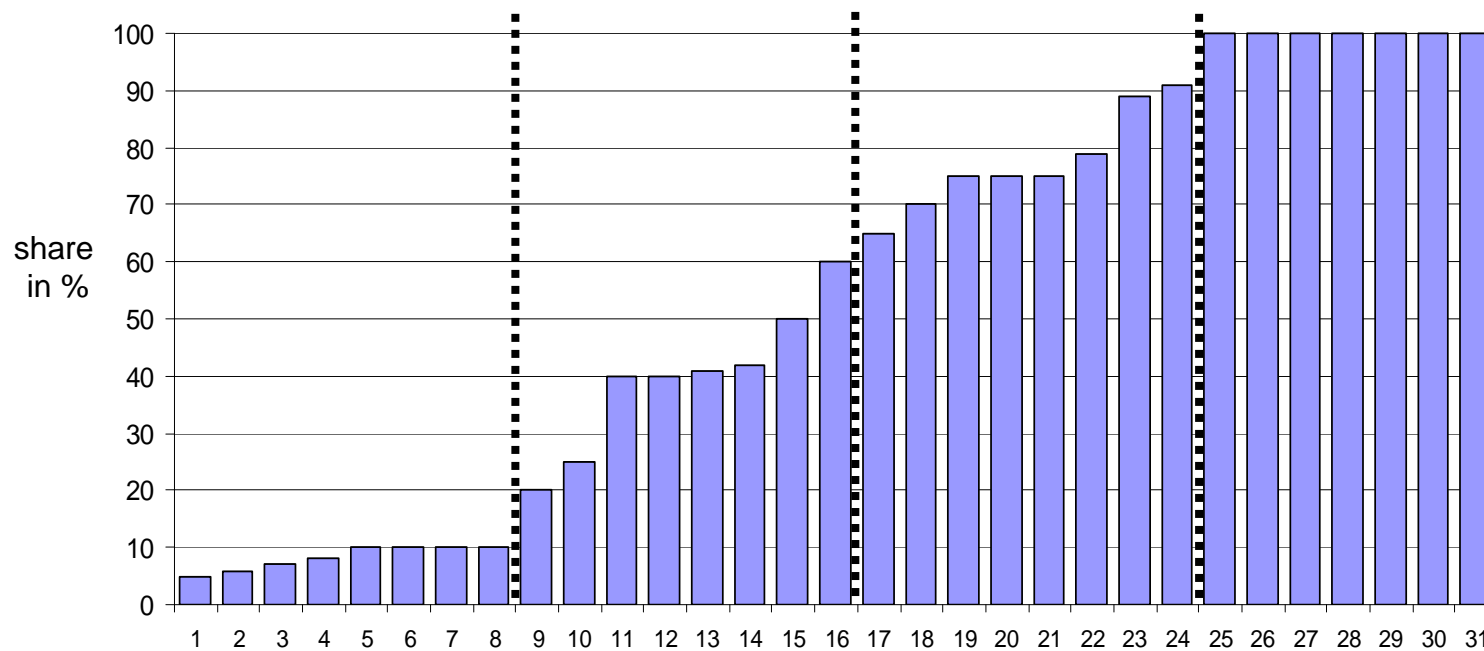
The share in 2009 ranges from 5% to 100% per agency (in 2008 from 1% to 100%)



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Revenue from Audio Branding Compared to Total Revenue

The share in 2009 ranges from 5% to 100% per agency (in 2008 from 1% to 100%)

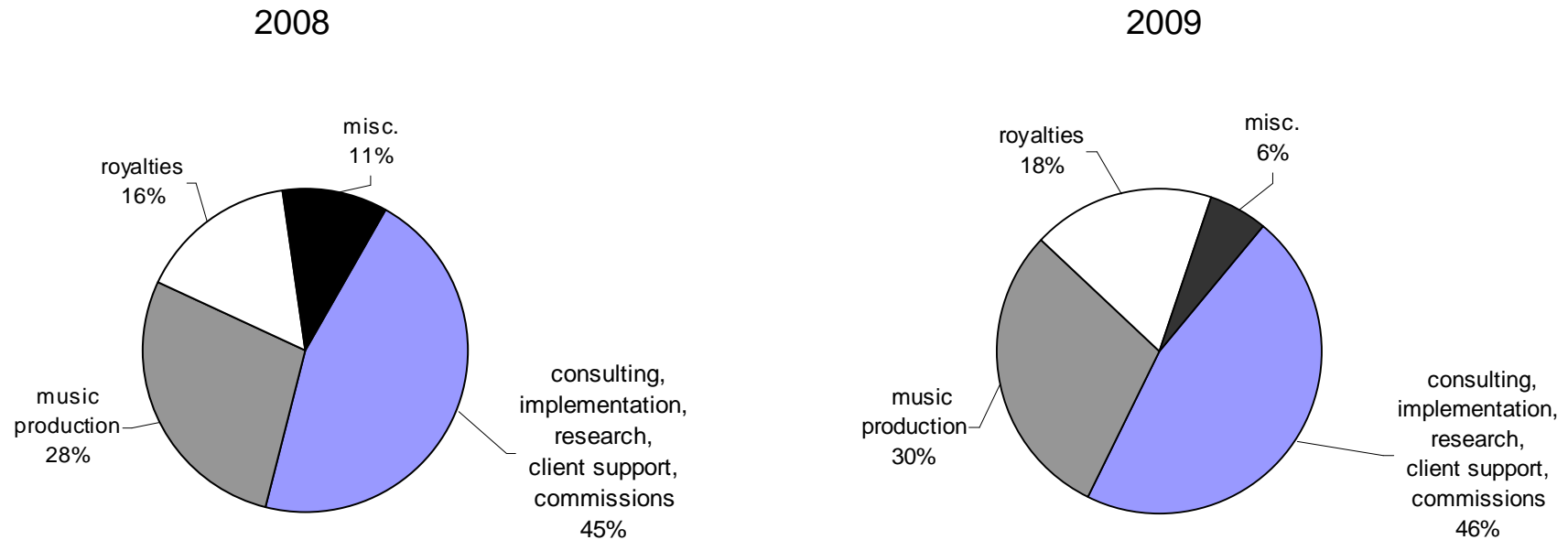


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Audio Branding Services

Share of audio branding services of total audio branding revenue



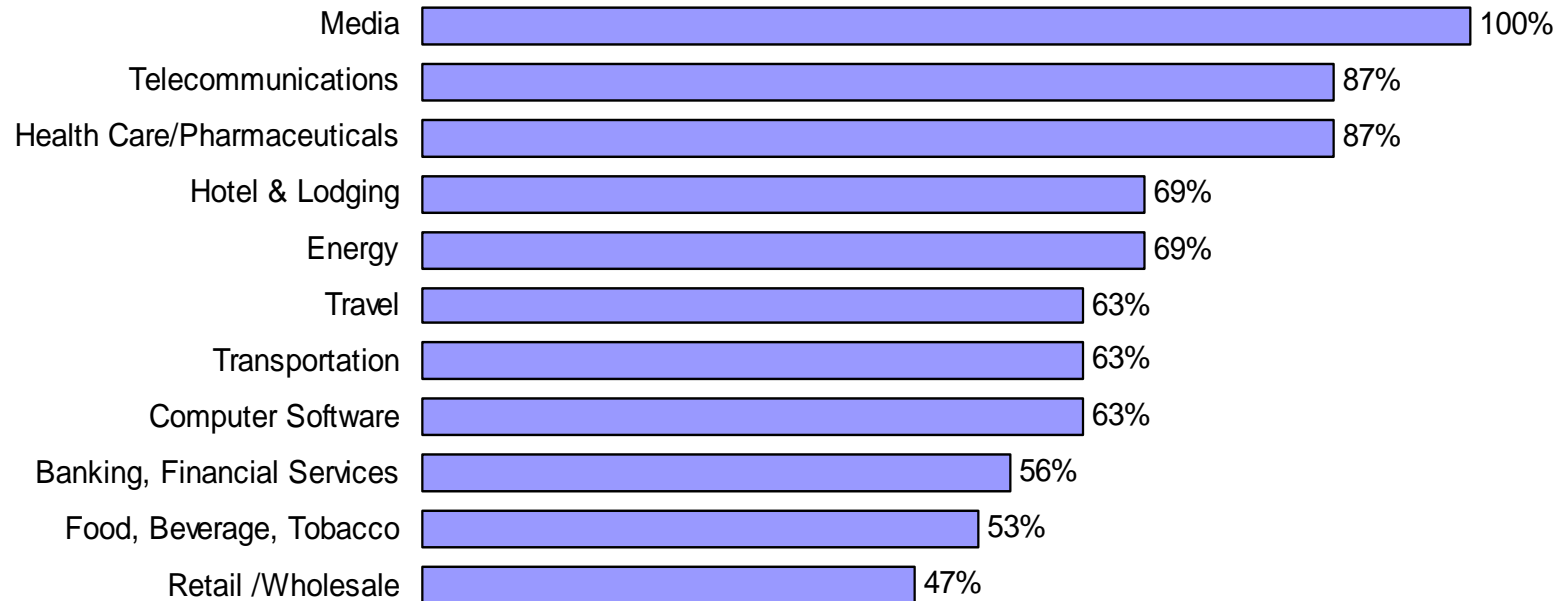
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Client Industries - Part 1/2

Question: From which industries are the clients from?

(100 percent means every agency has clients from this industry)



Media enterprises, telecommunication and pharmaceutical companies are the most frequent customers.

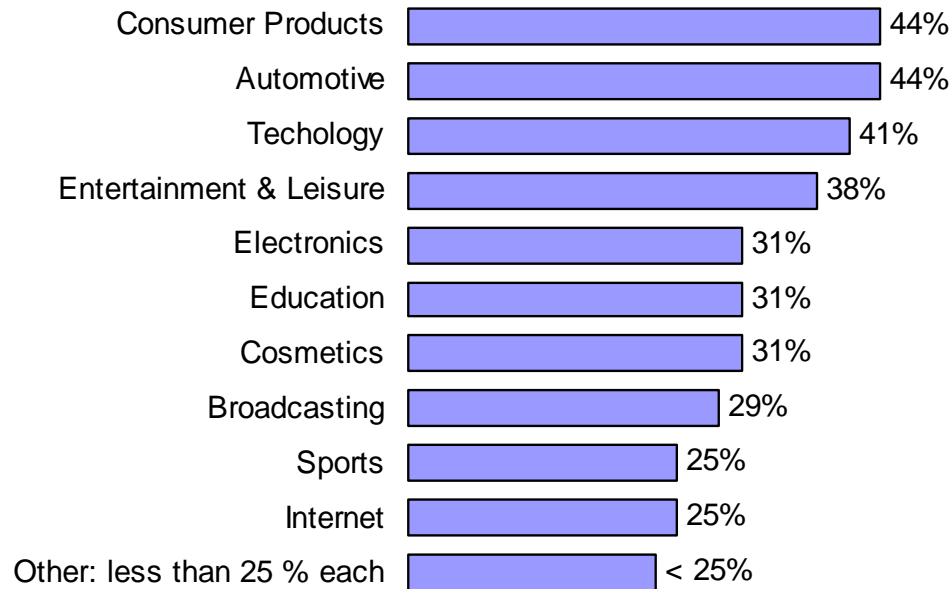
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Client Industries - Part 2/2

Question: From which industries are the clients from?

(100 percent means every agency has clients from this industry)



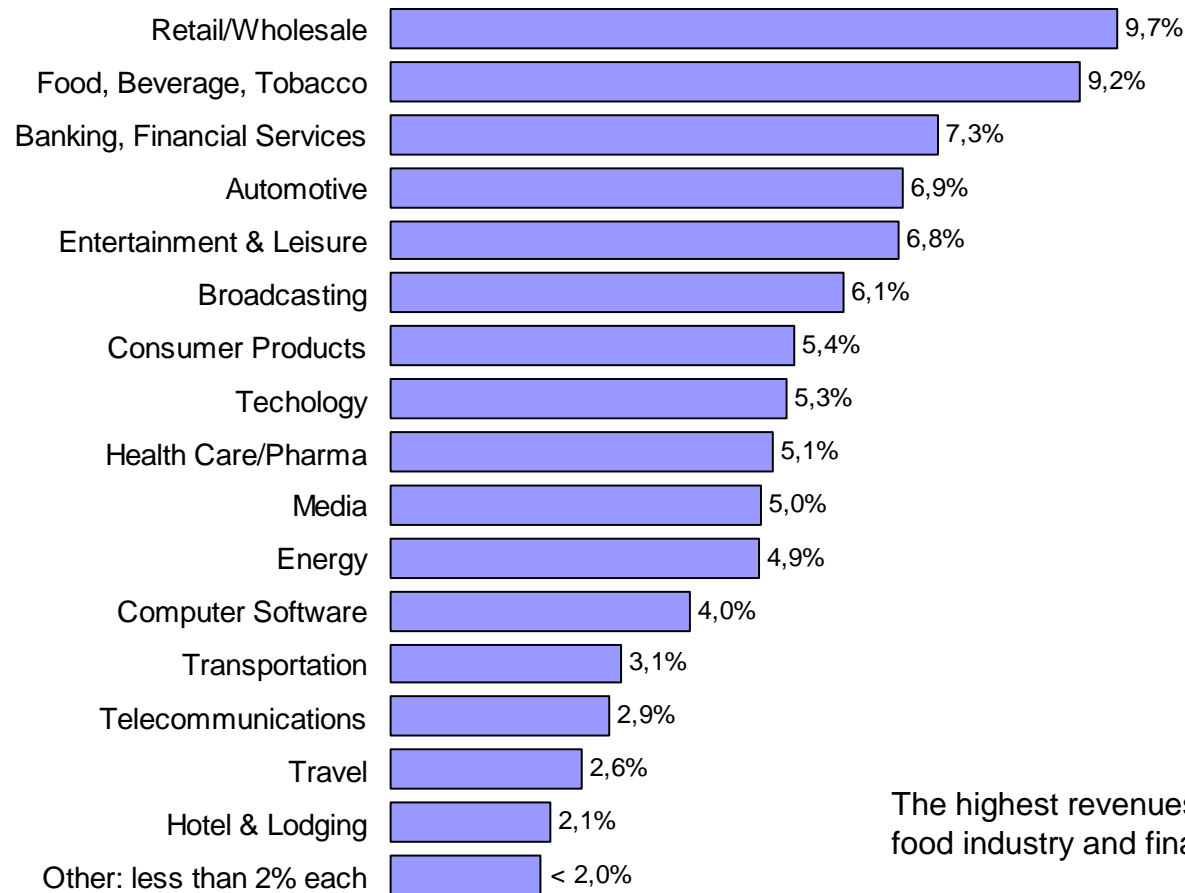
Media enterprises, telecommunication and pharmaceutical companies are the most frequent customers.

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Share of Industries to Audio Branding Revenue in 2009

Question: Which industries contributed how much to the revenue of your company?

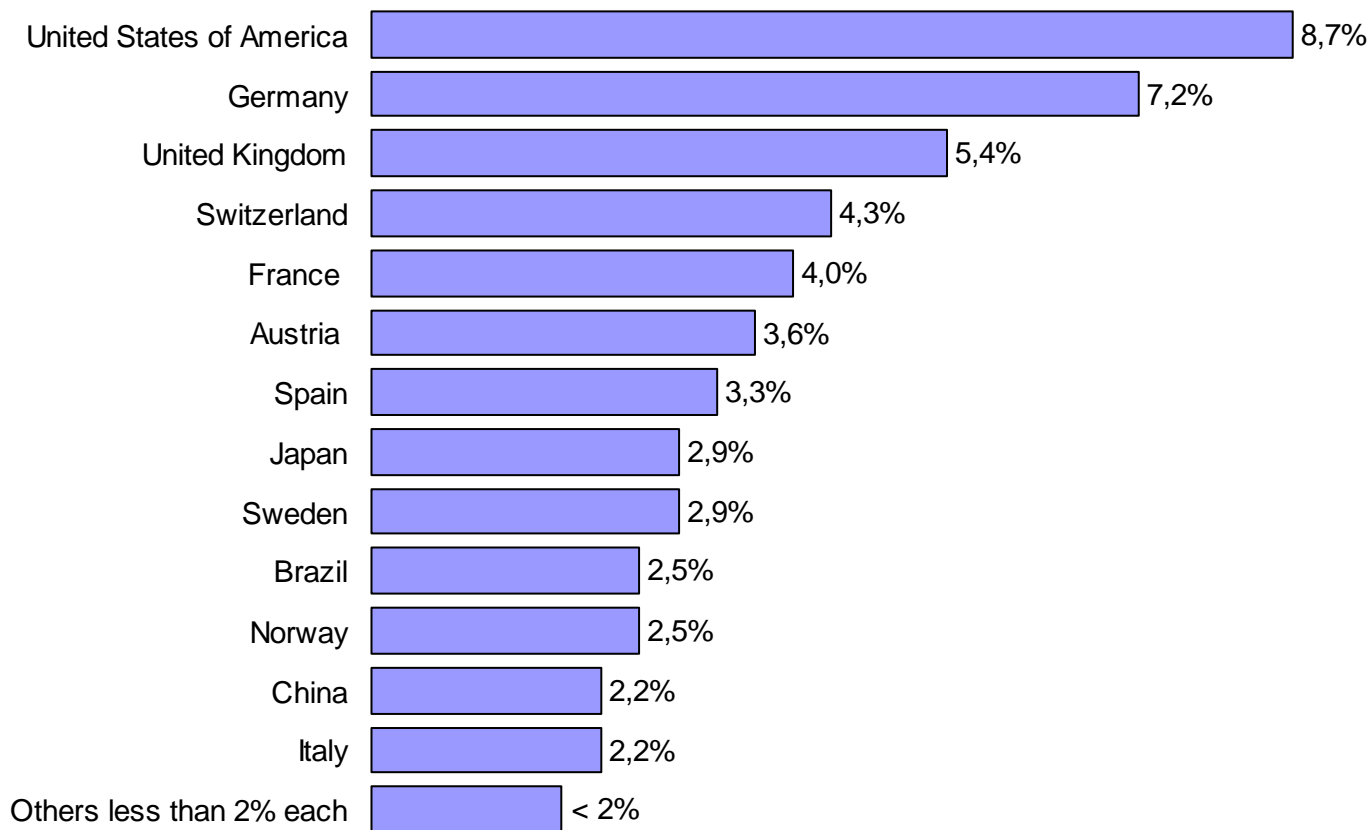


The highest revenues are achieved in retail business, food industry and financial services.

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Projects in Countries

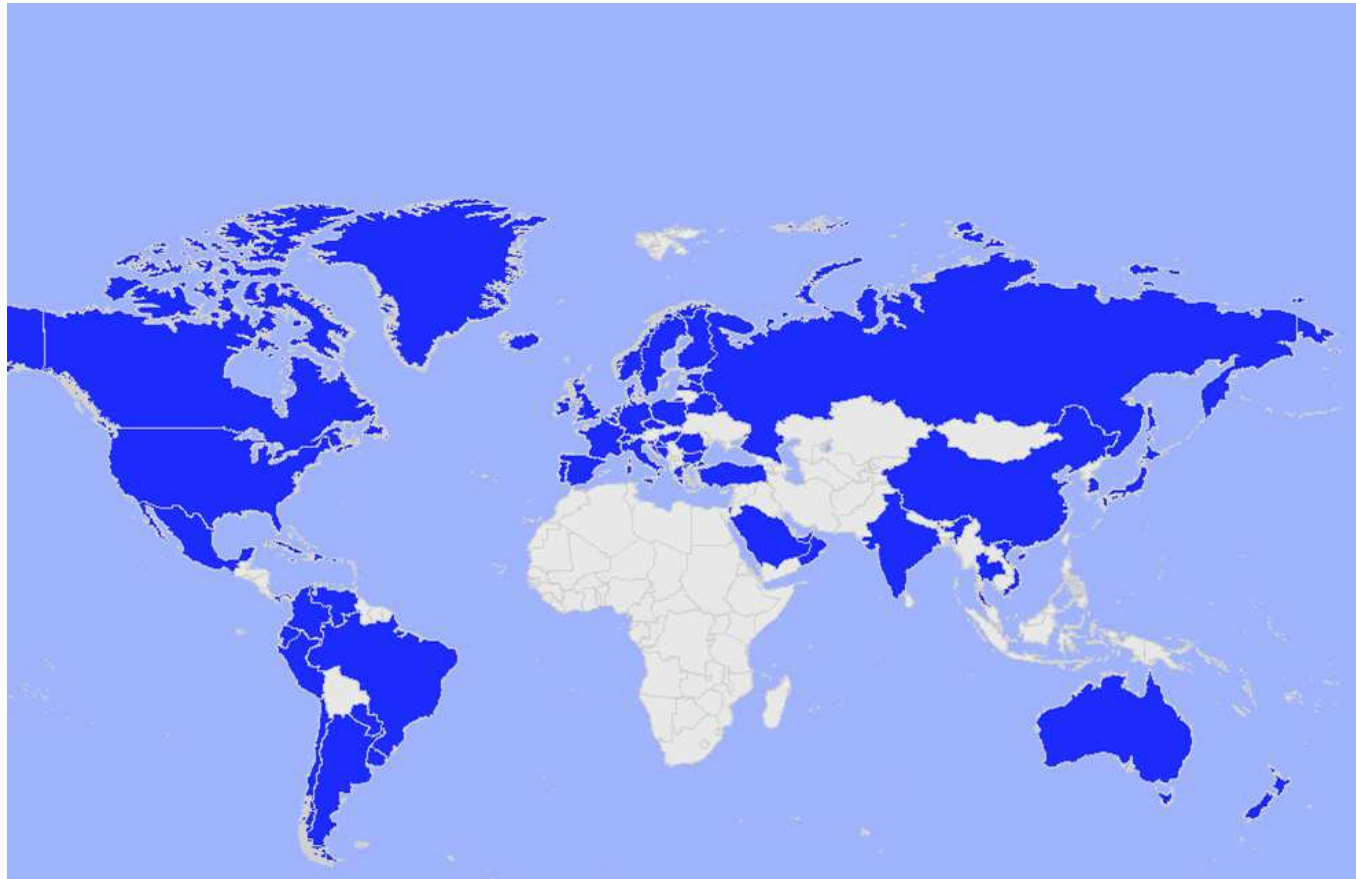
Question: In which countries has your company carried out projects so far?



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Projects in Countries



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Daily Rates of Employees

Question: What are your company's current daily rates for...?

position	average in US\$	min. in US\$	max. in US\$
managing director	2178	1000	5000
creative director	1769	750	3000
senior manager	1323	500	2500
junior manager	955	350	1600
assistant	700	300	1250

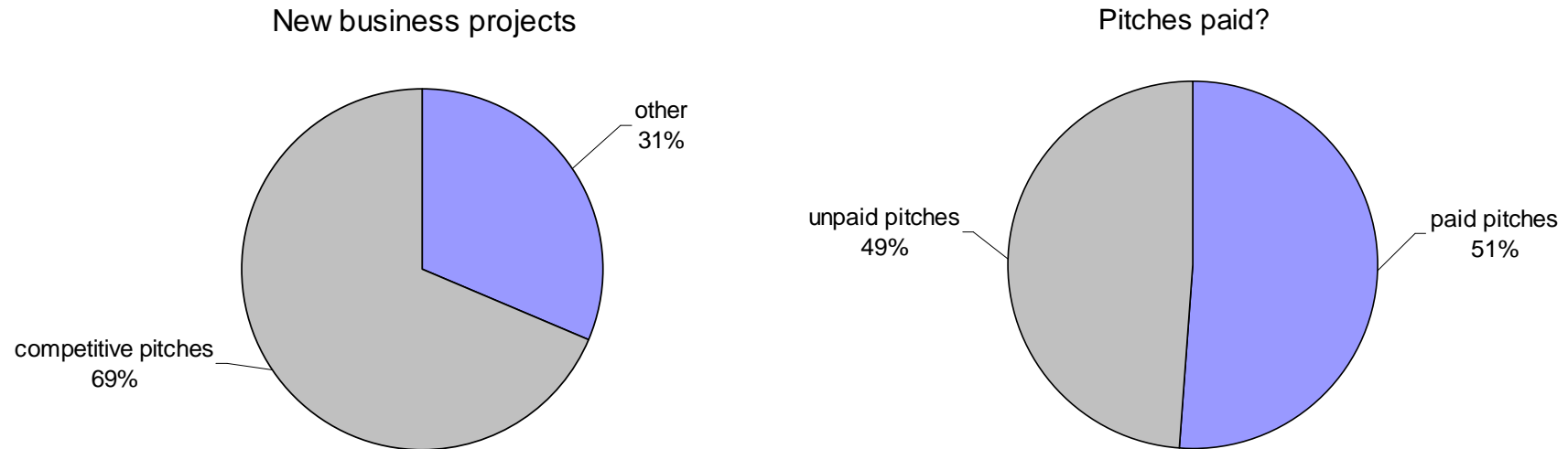
1US\$ ~ 0,76€ ~ 0,64€

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New Business Projects and Pitches

Question: How many of the new business projects of your company in 2009 were competitive pitches?

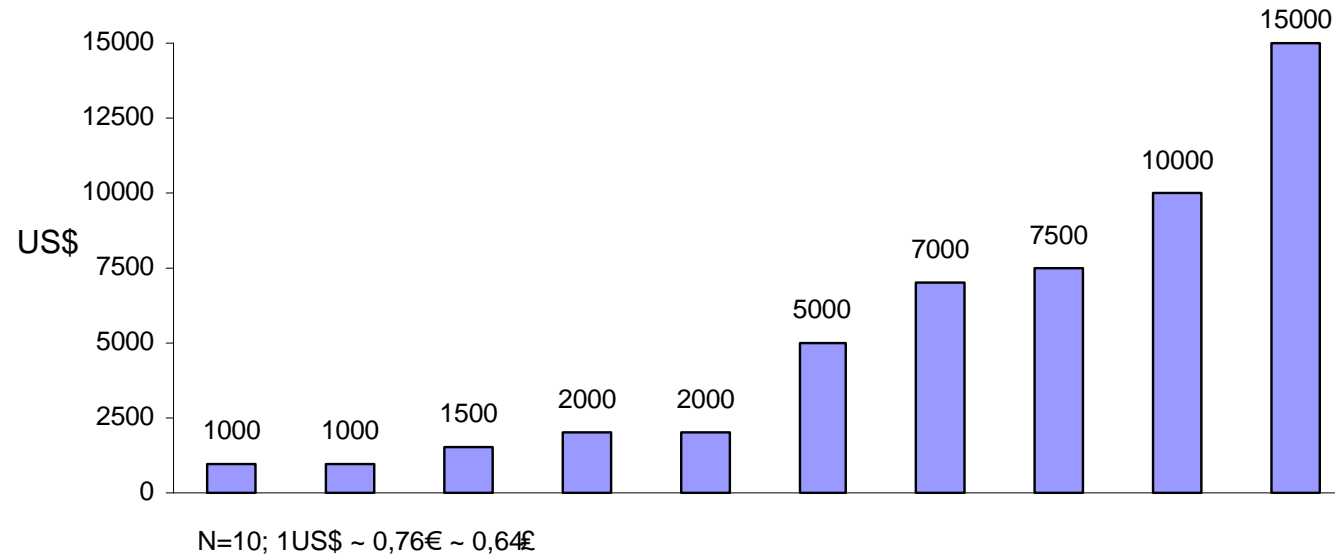


Only 51 % of all pitches were paid ones.

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Pitch Fees

Question: How much was the average competitive pitch fee in 2009?



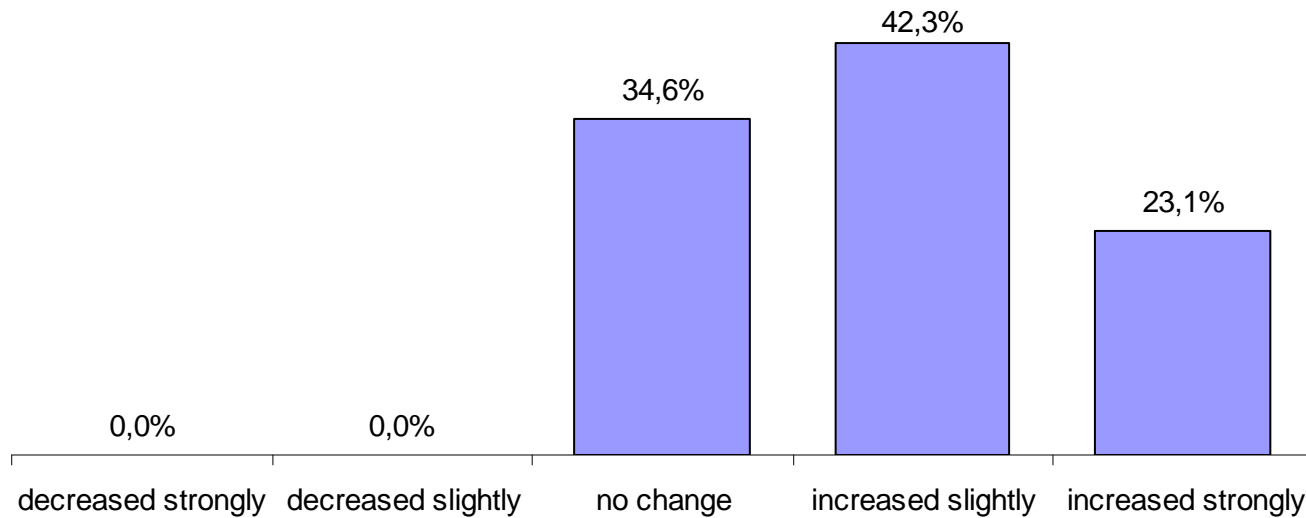
There is a wide range of fees that allows no clear answer for this question. The average is 5200 \$.

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Trends: Development from 2009 to 2010

Question: How has the interest and demand of clients for audio branding evolved from 2009 to 2010?

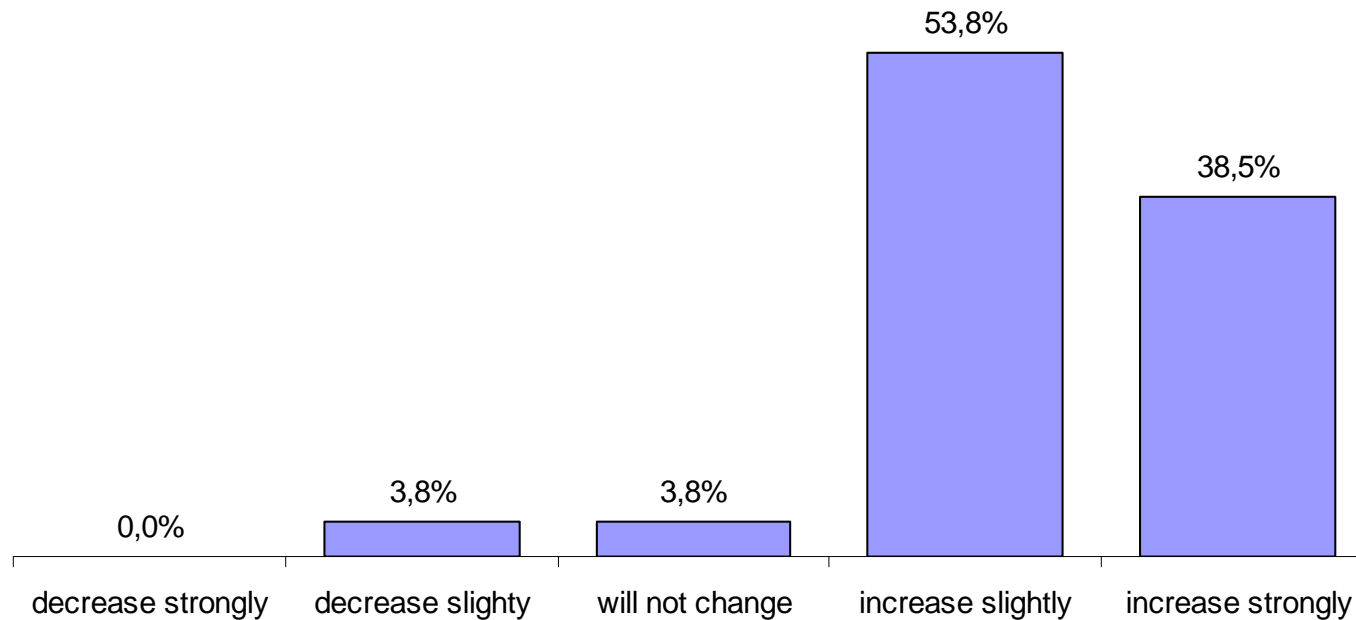


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Trends: Outlook 2011

Question: What do you think, how will the interest and demand of clients for audio branding evolve in 2011?



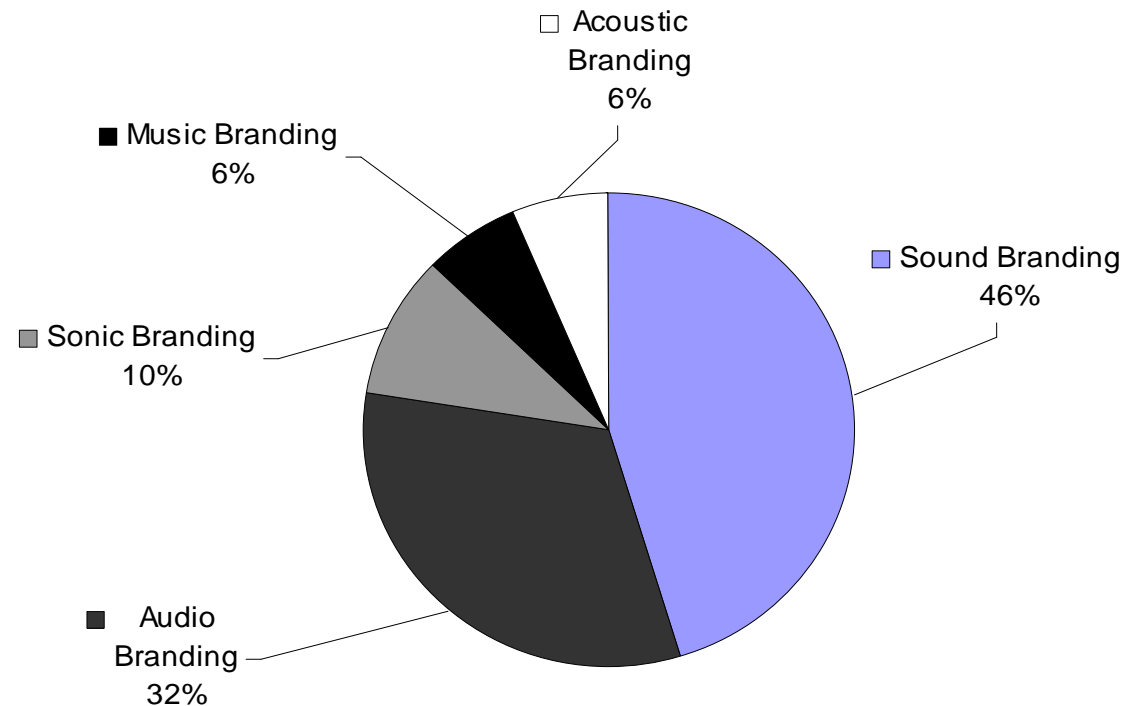
92,3% of the respondents think the business will increase in 2011.

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Terminology

Question: Please name – in your terminology – the acoustic equivalent for **visual branding**

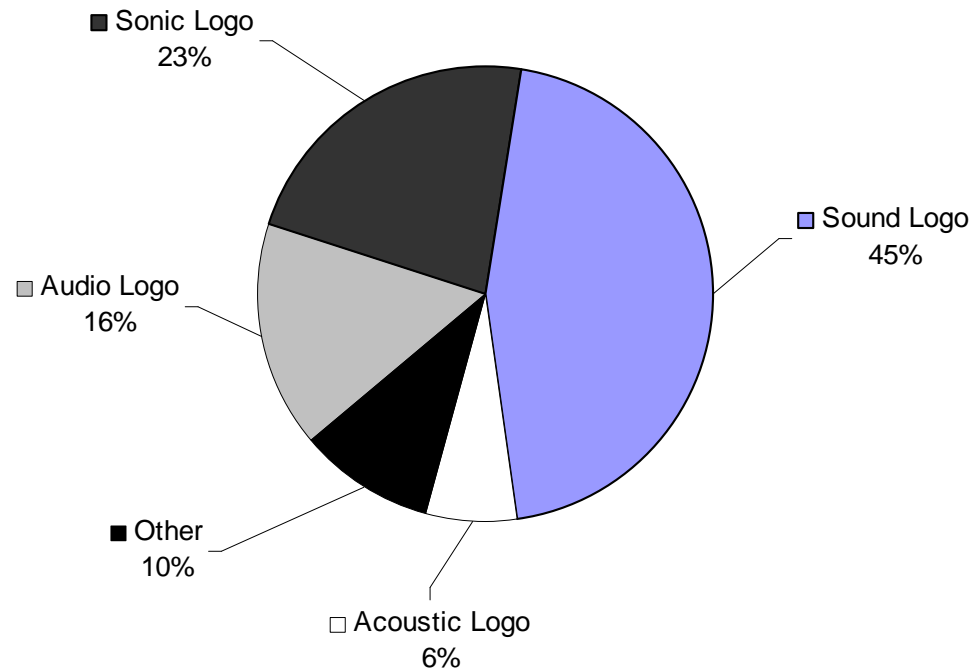


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Terminology

Question: Please name – in your terminology – the acoustic equivalent for **visual logo**



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- A documentation of the survey will be included in the **Audio Branding Academy Yearbook 2010/2011** to be published beginning 2011
- Feel free to discuss the survey and its results on **ICAB** (International Community for Audio Branding)
- Contact: email: barometer@audio-branding-academy.org



Thank you for your attention!