

UNCOVERING A MUSICAL MYTH

A SURVEY ON MUSIC'S IMPACT IN PUBLIC SPACES



**“ JUST AS INTERIOR
DESIGN IS PART OF THE
IN-STORE EXPERIENCE,
MUSIC HAS BECOME
AN IMPORTANT
COMPETITIVE TOOL FOR
BUSINESS OWNERS ”**

FOREWORD

There are many myths about the impact music has on us as humans. Most of us have probably heard stories about how music played in restaurants and shops can affect people, causing them to stay longer, shop more, or leave. A myth often originates from a historically recognised truth to some extent. This proves to be true here as well.

Here we have a survey that gives clear answers on how music affects our comprehension of a shop or restaurant visit, for example. The results speak for themselves. Music played in-store and in other businesses in public places has become more than just Muzak played in the background. It has moved to the forefront. Just as interior design is part of the in-store experience, music has become an important competitive tool for business owners.

However, there are many pitfalls and the survey shows that owners of both small and large businesses have a lot of homework to do. A large number of us reject the way businesses work with music today. So how can a business owner use music to make consumers satisfied and come back?

You'll find out the answer if you turn the page. One thing's for sure. The myth about music is true.



Jakob Lusensky
CEO Heartbeats International
jakob@heartbeats.fm

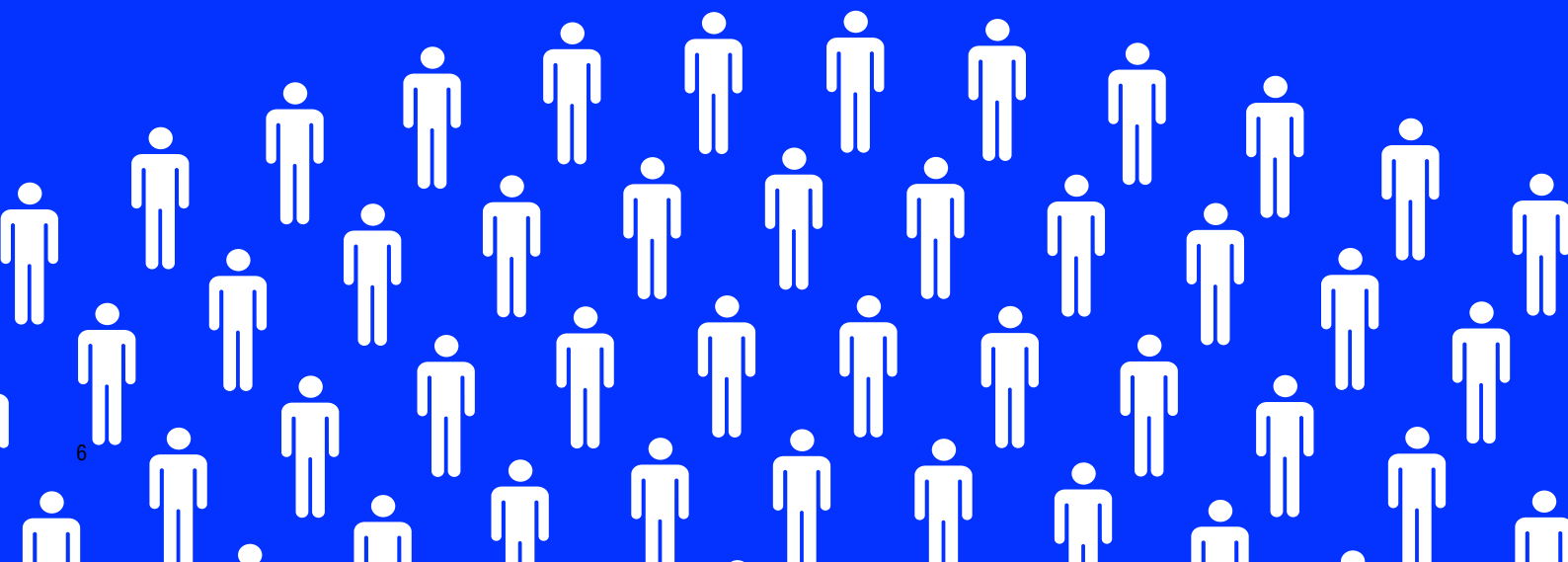


HEARTBEATS *international*

INDEX

FIVE TRUTHS ABOUT THE IMPACT OF MUSIC	6
WHY A SURVEY ABOUT MUSIC?	8
THE IMPORTANCE OF MUSIC FOR PEOPLE	10
THE IMPORTANCE OF MUSIC FOR BUSINESSES	13
MUSIC'S ROLE AT WORKPLACES	24
CONCLUSIONS	27
TEN THINGS TO THINK OF AS A BUSINESS OWNER	28
SURVEY RESULTS	30
HEARTBEATS INTERNATIONAL	32

FIVE TRUTHS ABOUT THE IMPACT OF MUSIC



FIVE TRUTHS

We have summarised the results from the survey in five truths, or insights, worth remembering for any business owner running a business in a public place*.

1

PEOPLE RANK MUSIC AS MORE DIFFICULT TO LIVE WITHOUT THAN SPORTS, MOVIES AND NEWSPAPERS

2

PLAYING THE RIGHT MUSIC IN YOUR BUSINESS MAKES CONSUMERS STAY LONGER

3

MUSIC PLAYED IN YOUR BUSINESS AFFECTS CONSUMERS' OPINION OF YOUR BRAND

4

MUSIC ENHANCES WELLBEING AMONGST EMPLOYEES IN WORKPLACES

5

PEOPLE THINK IT IS IMPORTANT THAT ARTISTS, MUSICIANS AND SONGWRITERS GET PAID FOR MUSIC BEING PLAYED IN PUBLIC PLACES

**Public places has been used as a generic term for businesses such as shops, shopping malls, supermarkets, restaurants, hotels, transportation services, sports stadiums, gyms and workplaces.*

WHY A SURVEY ABOUT MUSIC?

There are plenty of myths about music and how it affects us as humans. Often they are about how music affects our feelings on a subconscious level; that music which is played in a shop, or at a restaurant, affects the way we buy. Who hasn't heard that music can make us buy more, or choose one product over another?

A couple of international surveys have been conducted on the subject and they answer some of these questions. The most quoted being a survey about music and wine, conducted in England in 1999, by Dr. Adrian C. North and Dr. David J. Hargreaves¹. The results from their survey show that almost 8 out of 10 consumers buy French wine when French music is played in-store, and more than 7 out of 10 choose German wine when German music is played. When the consumers were asked about their product choices, the majority said that the music didn't affect their purchase. This clearly illustrates the fact that consumers are affected by music, but often on a subconscious level.

“ ALMOST 8 OUT OF 10 CONSUMERS BUY FRENCH WINE WHEN FRENCH MUSIC IS PLAYED IN-STORE ”

Some of the myths about the impact of music have already been confirmed as truth. What we wanted to do here was to survey the impact of music on a more detailed level; what impact does it have on people, on businesses in public as well as on workplaces? And what should business owners think of when they play music in their businesses? How do they get consumers to stay longer and buy more?

¹Dr Adrian C. North, Dr David J. Hargreaves and Jennifer McKendrick (1999), *The influence of in-store music on wine selections. Journal of Applied Psychology, 84, 271-276*

“ A DEEPER UNDERSTANDING OF HOW CONSUMERS ARE AFFECTED BY MUSIC IS IMPORTANT FOR ANYONE WHO RUNS A BUSINESS WHERE THE EXPERIENCE OFFERED IS BECOMING A MAIN DIFFERENTIATING FACTOR ”

METHODOLOGY

Together with Stim and SAMI, the Swedish counterparts to PRS and PPL in England, communication and branding agency Heartbeats International wanted to learn more about how people rank music in their everyday lives and the importance of music for businesses in public places.

A deeper understanding of how consumers are affected by music is important for anyone who runs a business where the experience the consumer is offered is becoming a main differentiating factor. In this report we give you the answers and we also let you know what you should think of, as a business owner, when choosing music for your business.



HEARTBEATS *international*

THE IMPORTANCE OF MUSIC FOR PEOPLE

...IS HUGE

We knew it. People have a very unique relationship to music in their lives. We did understand that they love music, but didn't know that music was that much more important for people in their lives than sports, art and movies. Music even beats literature and newspapers.

Wherever we turn today, we're offered pop culture in some form, and all of it competes to get our time and attention. Therefore, we wanted to know how people rank music in relation to other pop cultural phenomena. We plainly asked people what they would consider as most difficult to live without in their daily lives.

WHAT IS MOST DIFFICULT FOR PEOPLE TO LIVE WITHOUT IN THEIR DAILY LIVES?

1	INTERNET (70%)
2	MOBILE PHONE (54%)
3	MUSIC (40%)
4	TV (40%)
5	LITERATURE (24%)
6	NEWSPAPERS (23%)
7	SPORTS (21%)
8	RADIO (21%)
9	MOVIES (13%)
10	ART (6%)

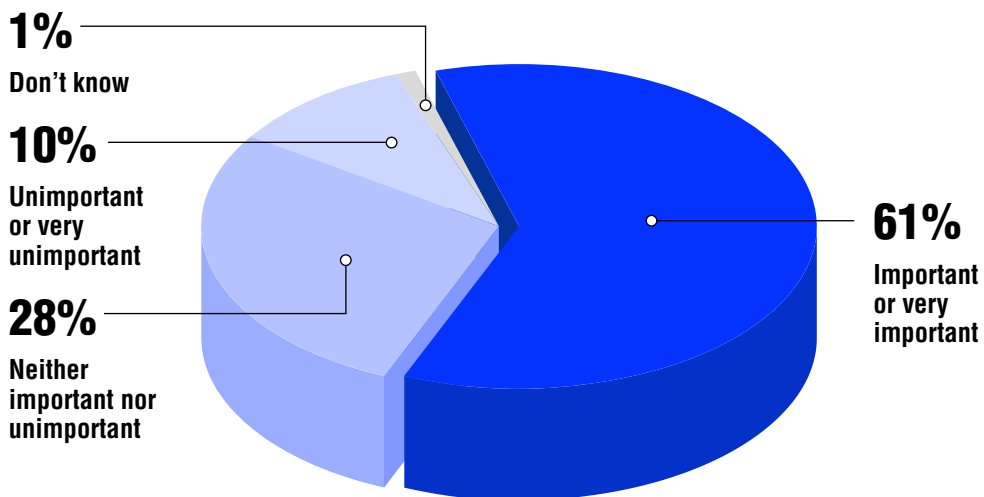
PEOPLE RANK MUSIC AS MORE DIFFICULT TO LIVE WITHOUT THAN SPORTS, MOVIES AND NEWSPAPERS

The respondents had to choose between ten things. The result shows us that people only rank the Internet and their mobile phone as harder to live without than music, and that music is more difficult to live without than sports, movies and newspapers. Music is also ranked higher than TV, literature, radio and art.

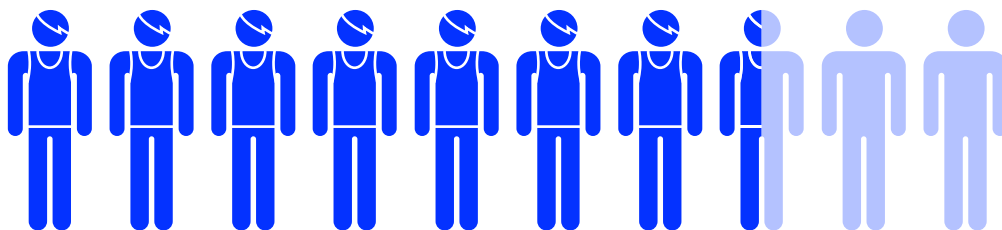
MUSIC IS IMPORTANT OR VERY IMPORTANT IN THE MAJORITY OF PEOPLE'S LIVES

We let the respondents rank how important they consider music to be in their lives. The result shows that 61% consider music to be important or very important. The figure rises to 74% when we look at the results from the younger generation, the 16-24 year olds.

HOW IMPORTANT IS MUSIC IN YOUR LIFE?



74% OF 16-24 YEAR OLDS SAY MUSIC IS IMPORTANT OR VERY IMPORTANT IN THEIR LIVES



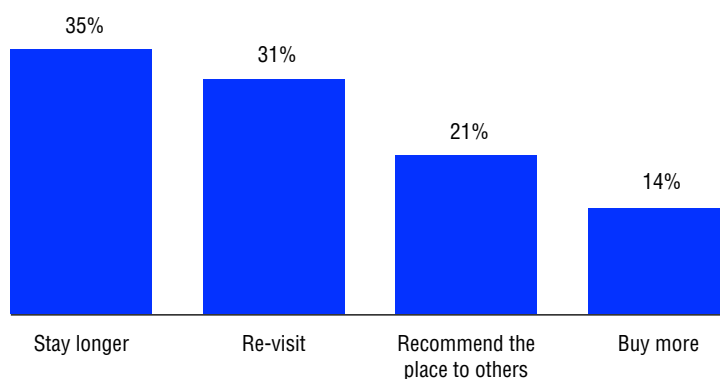
THE IMPORTANCE OF MUSIC FOR BUSINESSES

MUSIC MAKES CONSUMERS STAY LONGER

Music is the language of emotions and a tool that can be used to connect emotionally to consumers. It builds brand equity, making consumers more loyal. An international study shows that businesses with music that fits their brand identity are 96% more likely to be recalled than those with non-fitting music or no music at all¹. We wanted to know if the myth that music can change consumer behaviour is true, and asked the respondents to what extent they would stay longer, buy more, re-visit as well as recommend others to visit a business that plays music which they appreciate.

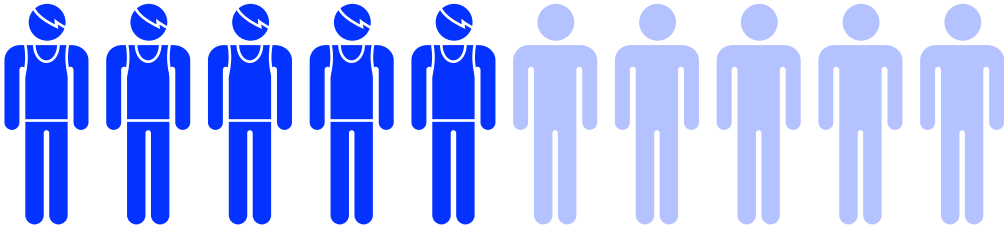
The survey reveals that appreciated music makes almost 4 out of 10 stay longer in a business in a public place. Further, 31% of all people return, 21% recommend the business to others and 14% also say they buy more. In other words, music is very important to businesses!

WHEN MUSIC THAT I APPRECIATE IS PLAYED IN A PUBLIC PLACE, IT CAN MAKE ME...



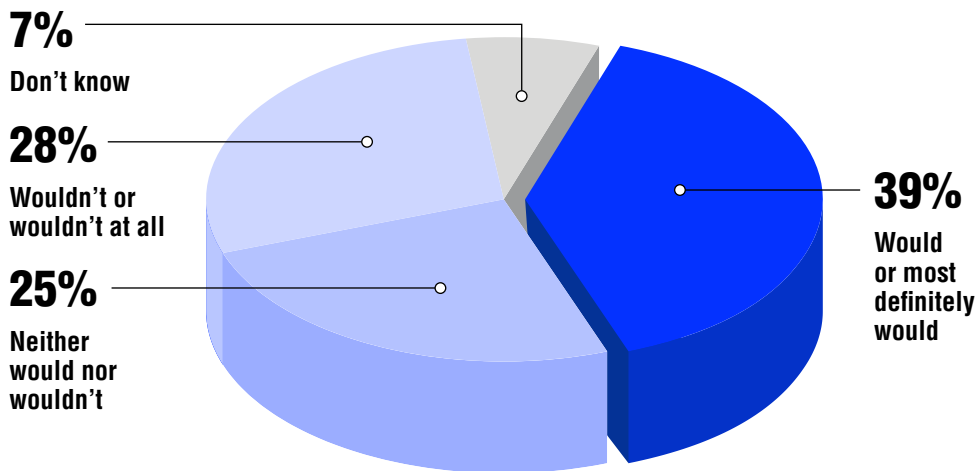
¹Dr Adrian C. North, Dr David J. Hargreaves, independent survey at Leicester University

50% OF 16-24 YEAR OLDS STAY LONGER WHEN MUSIC THEY APPRECIATE IS PLAYED IN-STORE



The results from the survey further show that the younger the person is, the more important the music is. Half of 16-24 year olds stay longer and close to 4 out of 10 choose to come back to a business that plays music which they appreciate.

WOULD YOU RE-VISIT A BUSINESS THAT PLAYS MUSIC WHICH YOU APPRECIATE?

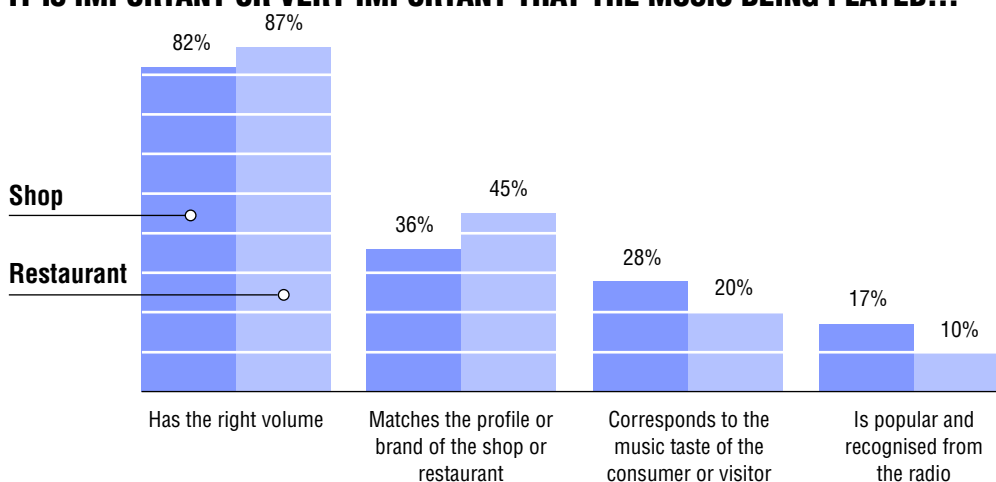


MUSIC PLAYED IN A BUSINESS AFFECTS CONSUMERS' OPINION OF THE BRAND

The results from our survey show that consumers think music, and most importantly 'the right music', is important for brands and businesses.

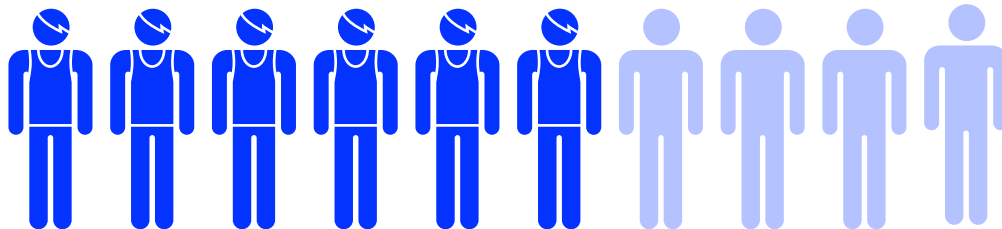
To learn what appreciated music, or 'the right music' is, we asked the respondents about music in two specific environments; shops and restaurants. First and foremost, the music has to have the right volume. Secondly, it has to match the business' profile, or brand. It is less important that the music corresponds to consumers' personal taste or that it hits the radio charts and is well recognised.

IT IS IMPORTANT OR VERY IMPORTANT THAT THE MUSIC BEING PLAYED...



MORE THAN HALF OF 16-24 YEAR OLDS SAY THAT MUSIC IN-STORE SHOULD FIT THE SHOP'S PROFILE

51% of all 16-24 year olds say that it's important or very important that the music being played in-store should match the brand or business profile of that store. Further, 74% think it is important or very important that the volume is right. In comparison, 34% of 16-24 year olds think that the music should correspond to what they listen to themselves, and only 18% say it is important or very important that the music is popular and that they recognise it from the radio.



Also, music that is played at a restaurant should match the restaurant's profile. Close to 6 out of 10 16-24 year olds think this is important or very important. When 25-64 year olds are included, the figure is 45%.

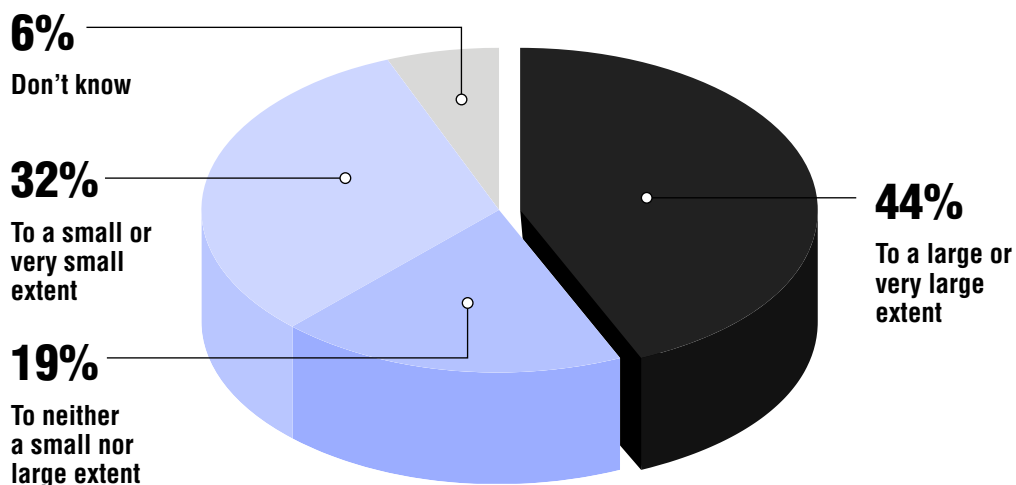
The results from our survey generally show that music is of specific importance to young people. This is even clearer when we look at music in-store. The survey result reveals that more than four times as many 16-24 year olds think that music in-store is important, compared to 45-64 year olds.

THE WRONG MUSIC PLAYED TOO LOUDLY MAKES CONSUMERS LEAVE

We wanted to know if music can have a negative impact on businesses in public places and asked the respondents about it. The results from our survey reveal that ‘the wrong music’ makes 44% (almost every second person!) leave a business, and 38% won’t come back.

Almost 4 out of 10 further say that ‘the wrong music’ makes them buy less. The important question to us was why. The answer being that people leave a place if the music there is played at a volume which is too loud and is blocking the conversation, or if the music being played is noisy and irritating.

CAN MUSIC PLAYED IN A BUSINESS IN A PUBLIC PLACE MAKE YOU LEAVE?



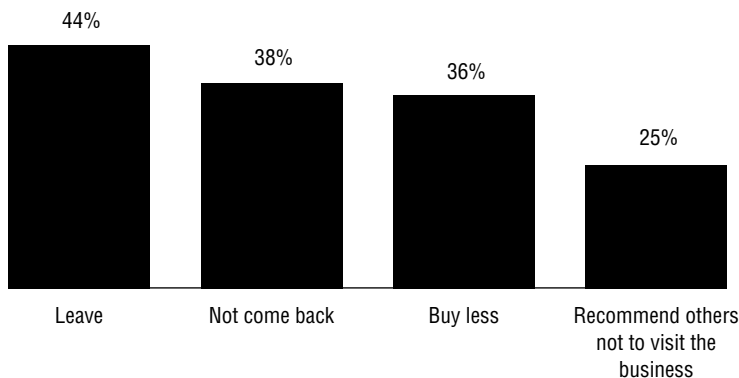
THE ONES WHO LEAVE A BUSINESS DO SO BECAUSE THE MUSIC IS...

- 1 PLAYED TOO LOUD / BLOCKING THE CONVERSATION 52%**
- 2 NOISY / IRRITATING 44%**

THE WRONG MUSIC DECREASES SALES

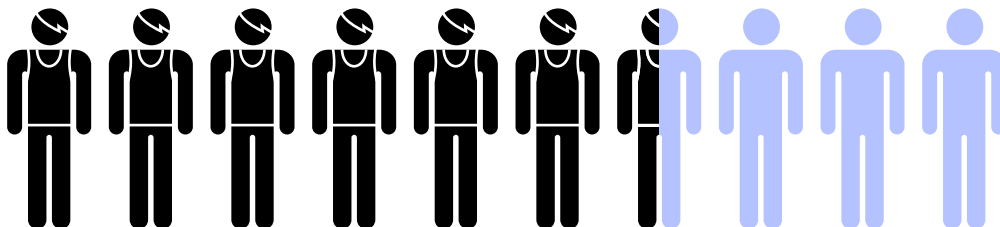
We also asked the respondents if music played in a business would make them buy less, not come back, or recommend others not to visit the business. Close to 4 out of 10 say that they would, to a high or very high extent, consume less. More would choose not to come back and close to 3 out of 10 say that they would recommend others not to visit the business. Thus it is of great importance to not only play music, but to look over the music selection and check how it is being played with regards to audio equipment and volume, etc.

THE WRONG MUSIC CAN MAKE ME...



THE ABSENCE OF MUSIC IS NEGATIVE

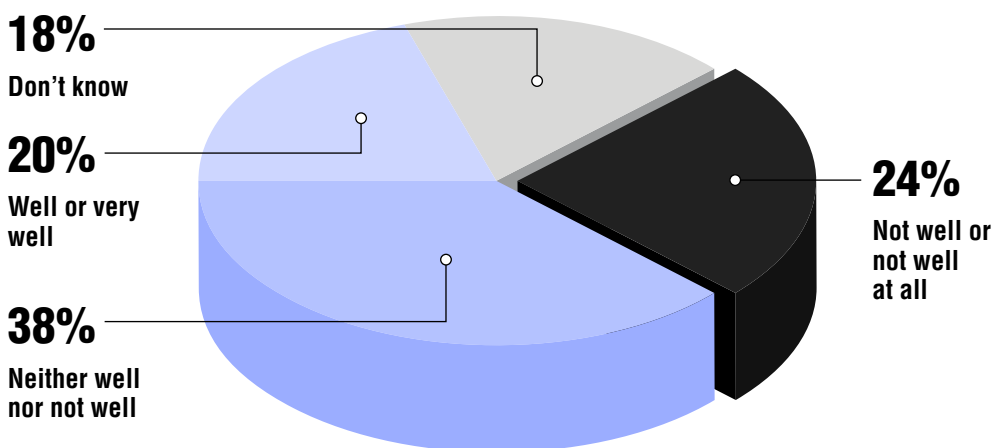
What about silence? 32-41% of the respondents say they would react negatively or very negatively to silence. More precisely, the absence of music in a business such as a shop, restaurant, hairdresser or at the shopping mall. And more than 6 out of 10 16-24 year olds would react negatively or very negatively if a gym didn't play music.



BUSINESS OWNERS HAVE PLENTY TO WORK ON WITH REGARDS TO MUSIC

Results from our survey reveal that more people today think businesses don't choose music well, compared to those who think they do. Most don't have any specific opinion; 38% answered neither well nor not well, and 18% don't know. It is obvious that businesses have plenty to work on in regards to the music they play today.

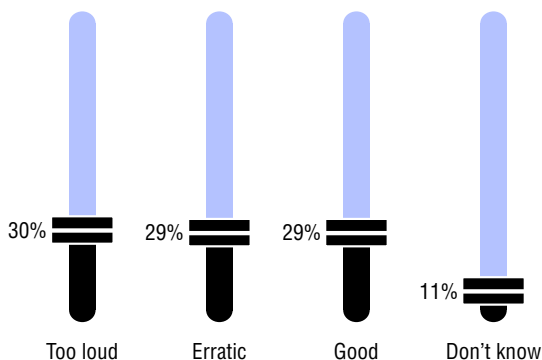
HOW WELL DO BUSINESSES CHOOSE MUSIC TO CREATE A POSITIVE ATMOSPHERE/EXPERIENCE?



THE IMPORTANCE OF THE RIGHT VOLUME

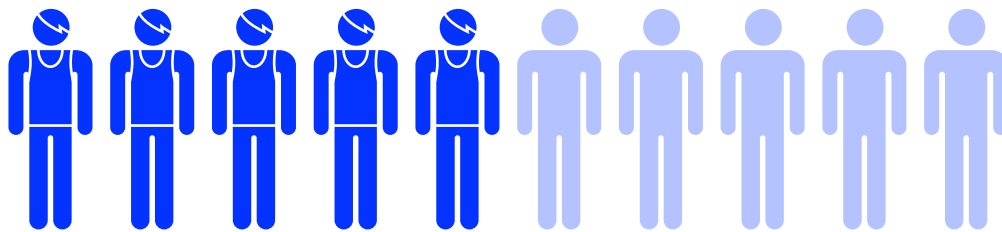
We wanted to know more about the volume of the music that is played in businesses today, and asked the respondents about it. Their answers show that business owners have some homework to do; close to 6 out of 10 say that the volume is either too high or erratic.

THE VOLUME ON THE MUSIC THAT IS PLAYED IN BUSINESSES IN PUBLIC PLACES IS CONSIDERED TO BE...



MORE THAN HALF OF 16-24 YEAR OLDS HAVE DISCOVERED NEW MUSIC IN A SHOP OR ANOTHER BUSINESS IN A PUBLIC PLACE...

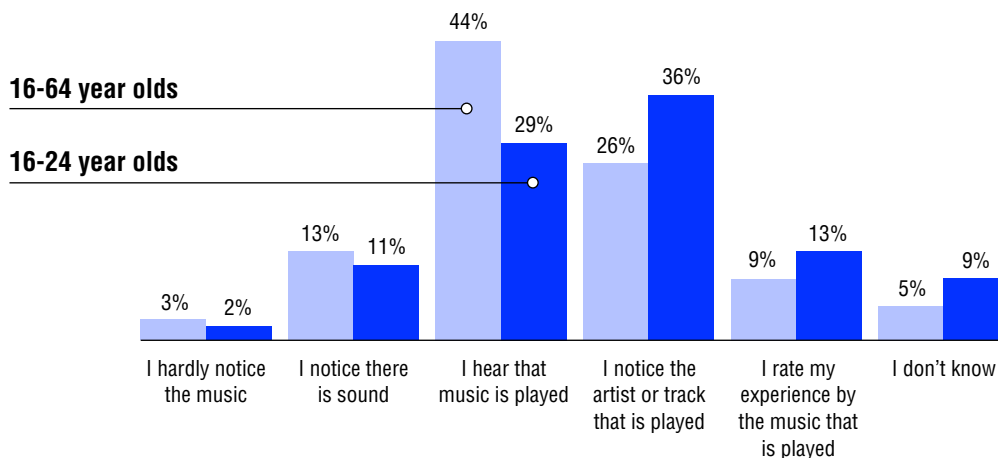
Our survey reveals that public places work as a source of inspiration for many! More than half of 16-24 year olds have discovered new music as well as new artists when they have visited a business in a public place. When 25-64 year olds are included, the figure is 30%.

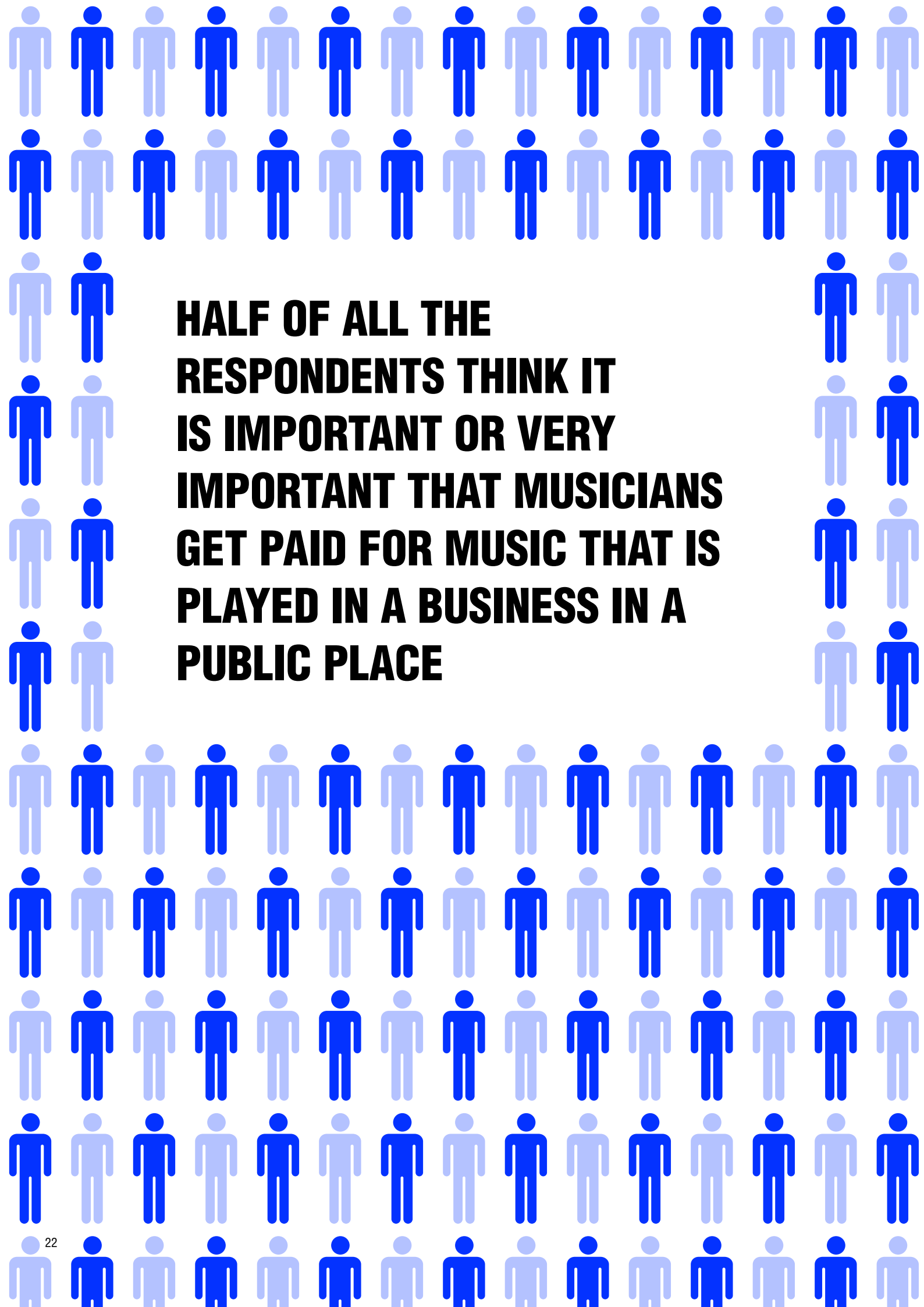


...AND MANY ALSO NOTICE WHAT ARTIST OR TRACK IT IS THAT IS BEING PLAYED

Close to 4 out of 10 16-24 year olds notice the artist or track categorically, and 13% even rate their experience of a business by the music that is played.

HOW WELL DO YOU NOTICE THE MUSIC THAT IS PLAYED IN PUBLIC?





**HALF OF ALL THE
RESPONDENTS THINK IT
IS IMPORTANT OR VERY
IMPORTANT THAT MUSICIANS
GET PAID FOR MUSIC THAT IS
PLAYED IN A BUSINESS IN A
PUBLIC PLACE**

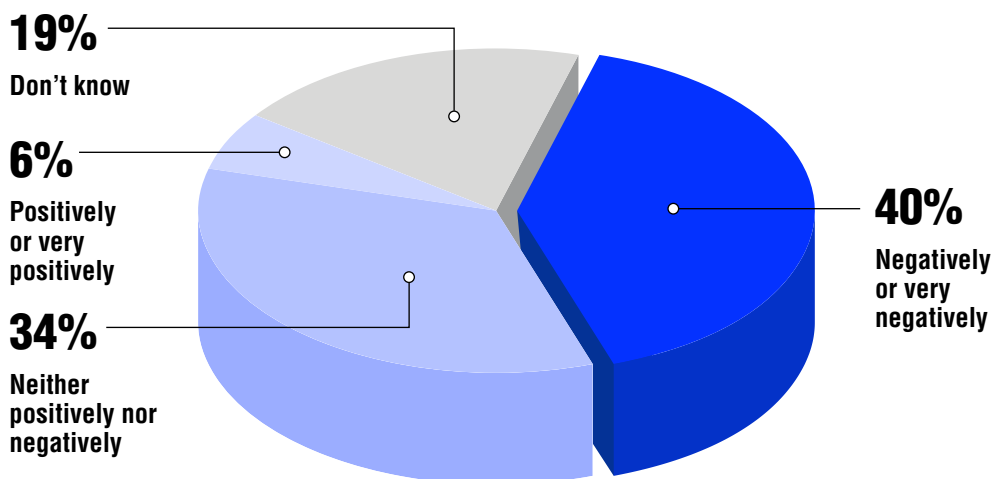
PEOPLE HAVE A NEGATIVE OPINION OF BUSINESSES NOT DOING THE RIGHT THING

Despite the fact that many download music illegally today, our survey reveals that the majority feel for the artists and songwriters, and think that it is important for business owners to pay for the music they play in their businesses.

It may be the artists and songwriters who have had to experience both the negative and the positive sides of the digital revolution the most. Since people buy music in physical formats less, artists and songwriters have witnessed their revenues being diversified. Downloads, placement of music in TV commercials, and live performances are just some of the areas where they get their revenues today. But the use of their music in businesses in public places also affects their income.

As many as 40% of the respondents in our survey would react negatively or very negatively if they found out that a business didn't pay for the right to play music.

HOW WOULD YOUR OPINION OF A BUSINESS CHANGE IF YOU FOUND OUT THAT THEY DIDN'T PAY FOR THE RIGHT TO PLAY MUSIC IN PUBLIC?



MUSIC'S ROLE AT WORKPLACES

MUSIC ENHANCES WELLBEING AT WORK

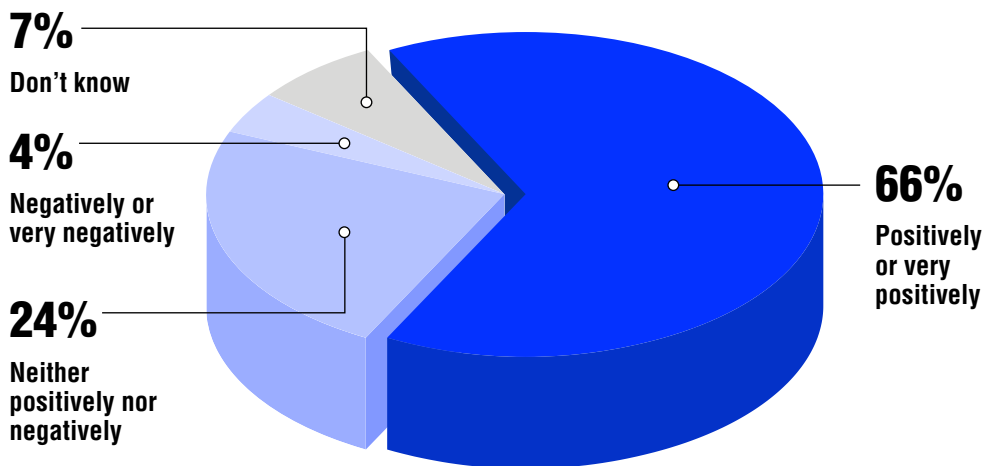
We have not only revealed that the myth about the impact of music on consumers is true. We have revealed that the myth about music affecting employees in a positive way is true as well.

We asked the respondents how often they listen to music at work. More than 6 out of 10 people listen to music every day or at least once a week when they're at work. The figure rises to almost 8 out of 10 amongst 16-24 year olds.



66% of those who listen to music everyday, or at least once a week, think that music affects them in a positive or very positive way at work. The figure for 16-24 year olds is 7 out of 10.

HOW DOES MUSIC PLAYED AT YOUR WORKPLACE AFFECT YOUR WELLBEING AT WORK?



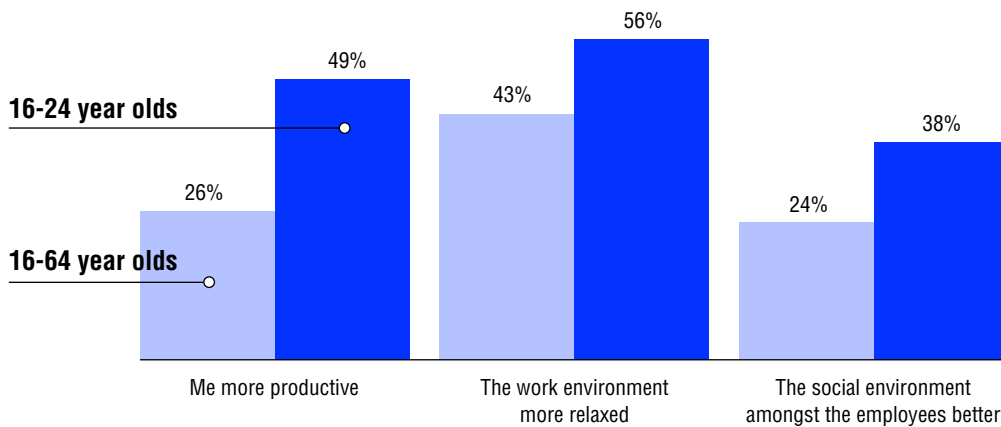
MUSIC MAKES EMPLOYEES MORE PRODUCTIVE

Of all people, close to 3 out of 10 say they love to listen to music while they're working. If we look specifically at young people, almost half of 16-24 year olds say they love to listen to music at work. But people do not just appreciate music while at work. Music affects them deeper than that. Close to 5 out of 10 of 16-24 year olds answered that they become more productive if they listen to music at work. Looking at the answers from all people, the figure is almost a third.

The results from our survey further show that 43% of all people say that music makes the work environment more relaxed. As regards 16-24 year olds, that figure rises to 56%, and close to 4 out of 10 say that music at work enhances the social environment amongst employees.

The survey results clearly show that music is a good investment. It creates a better atmosphere, makes employees feel better, and helps them work more productively.

MUSIC PLAYED AT WORK MAKES...



CONCLUSIONS

This survey has had some clear answers about music and the impact it has on people; we rank music as more important than both sports and newspapers. Music further affects the way we shop, and is of specific importance to the younger generation, the ones with the purchasing power of tomorrow.

The results do not only show that music is important to people, but also to business owners running a business in a public place. Music that is appreciated by the visitor makes them stay longer, but most important of all, come back. 'The right music' also makes consumers buy more and recommend a business to others.

Businesses in public places work as a source of inspiration where many discover new music and new artists. It's no longer solely the products or the service that determine whether a consumer appreciates a business or not. Many clothing shops have started to serve coffee next to fitting rooms, and supermarkets have started to offer consumers a glass of wine while they're doing their dinner shopping. Just like these sorts of added values, music has become an important competitive tool for businesses. Music is perhaps the most important element for businesses in targeting the younger generation. Therefore, it is of great importance for businesses to understand that the music they play constitutes an important piece of the experience they offer consumers. But it is crucial that the music has the right volume and matches the profile of the business or the brand. It is not enough to just play music that hits the top of the charts on the radio and is recognised, the music needs to fit the business where it is played.

“ MUSIC HAS BECOME AN IMPORTANT COMPETITIVE TOOL FOR BUSINESS OWNERS WHO WANT TO OFFER CONSUMERS ADDED VALUES ”

However, it is not only of importance for consumer-targeted businesses to play music. Workplaces in general can benefit from music. Music makes employees feel better and become more productive. Many employees also experience an enhanced wellbeing as well as better fellowship at work while music is being played. So music at work is a good investment!

Finally, music is so much more than something played in the background. Music has moved to the forefront and today it is an important piece in the creation of an experience which touches all of our senses.

TEN THINGS TO THINK OF AS A BUSINESS OWNER



CHECKLIST FOR MUSIC IN YOUR BUSINESS

- 1 MUSIC IS PART OF THE WHOLE IN-STORE EXPERIENCE**

It is no longer only the products or the services you offer that determine if consumers appreciate your business or not. Music is an important competitive tool in distinguishing your brand experience.
- 2 DEFINE WHAT YOUR BRAND SOUNDS LIKE**

Music and sound are effective communication tools. The music you play should have a clear profile matching the experience you want to create; what associations do you want consumers to get from the music, what emotions do you want to awaken, how do you want to reflect your business in the music?
- 3 DON'T FORGET THE VOLUME**

Don't play the music too loudly, but not too low either - then the music just becomes annoying. Dare to go from background music to letting the music be in the forefront!
- 4 THINK OF THE RATIONAL FUNCTIONS OF THE MUSIC**

Is the purpose of the music to camouflage noisy sound, make 'dead zones' come alive, or to guide the visitor in-store?
- 5 MAKE AN INVENTORY OF YOUR AUDIO EQUIPMENT**

If you don't have the right equipment, get it!
- 6 TRY THE MUSIC AND VOLUME ON YOUR EMPLOYEES AND CONSUMERS REGULARLY**

Ask your employees and consumers what they think of the music you play. It will give you some guidance.
- 7 WHO IS THE MUSIC PLAYED FOR?**

Is it for the brand manager who wants to have a clear music profile; is it for employees who are after a good variation of music; or is it for the sake of consumers and satisfying their taste in music? There is no right or wrong, but it is important to think of who the music is played for and why.
- 8 ARE COMMERCIAL SPOTS AND INSPIRATIONAL MESSAGES SOMETHING YOUR BUSINESS WOULD GAIN ON?**

If you play music from a streamed web-radio you have the possibility to program spots into your music program. This can increase your revenues effectively.
- 9 GET A MUSIC LICENSE**

If you play music in your business you do need a music license.
- 10 PROFESSIONALISM IS ESSENTIAL**

If you are uncertain about something, contact a music partner who can help you hit all the right notes with your consumers.

You can find more hands-on tips and ideas on how to build a total experience with the help of music in the book *Sounds like Branding*, internationally released in July 2011. More info www.soundlikebranding.com/book

SURVEY RESULTS

1. What of the following things, or pop cultural phenomenon, would be most difficult to live without in your daily life?

	16-64 y.o.	16-24 y.o.
Literature	24%	15%
Music	40%	55%
Internet	70%	82%
Mobile phone	54%	72%
Newspapers	23%	10%
Movies	13%	26%
TV	40%	27%
Art	6%	7%
Sports	21%	29%
Radio	21%	10%
Don't know	3%	2%

2. How important is music in your life?

	16-64 y.o.	16-24 y.o.
1 Very unimportant	1%	1%
2 Unimportant	9%	7%
3	28%	17%
4 Important	33%	31%
5 Very important	28%	43%
Don't know	1%	2%

3. To what extent do the following statements apply to you when a business in a public place plays music you appreciate?

The music makes me:

	16-64 y.o.	16-24 y.o.
Stay longer		
1 Doesn't apply at all	27%	12%
2 Doesn't apply	13%	9%
3	19%	23%
4 Applies	21%	31%
5 Applies fully	14%	19%
Don't know	6%	7%

Buy more

	16-64 y.o.	16-24 y.o.
1 Doesn't apply at all	39%	27%
2 Doesn't apply	19%	21%
3	19%	23%
4 Applies	10%	17%
5 Applies fully	4%	5%
Don't know	8%	8%

Re-visit

	16-64 y.o.	16-24 y.o.
1 Doesn't apply at all	29%	16%
2 Doesn't apply	14%	12%
3	20%	25%
4 Applies	20%	23%
5 Applies fully	11%	16%
Don't know	7%	7%

Recommend the place to others

	16-64 y.o.	16-24 y.o.
1 Doesn't apply at all	35%	23%
2 Doesn't apply	15%	10%
3	21%	26%
4 Applies	14%	20%
5 Applies fully	7%	12%
Don't know	8%	9%

4. How important are the following statements to you as regards the music that is played in a shop?

	16-64 y.o.	16-24 y.o.
The music corresponds with the music I listen to privately		
1 Not important at all	18%	9%
2 Not important	17%	19%
3	31%	32%
4 Important	19%	20%
5 Very important	9%	14%
Don't know	5%	7%

The music matches the business profile or brand

	16-64 y.o.	16-24 y.o.
1 Not important at all	20%	8%
2 Not important	13%	12%
3	25%	22%
4 Important	26%	32%
5 Very important	10%	19%
Don't know	6%	7%

The music is popular and I recognise it from the charts on the radio

	16-64 y.o.	16-24 y.o.
1 Not important at all	35%	31%
2 Not important	19%	18%
3	23%	25%
4 Important	13%	12%
5 Very important	4%	6%
Don't know	5%	8%

The music is played at the right volume

	16-64 y.o.	16-24 y.o.
1 Not important at all	3%	1%
2 Not important	2%	4%
3	9%	16%
4 Important	22%	24%
5 Very important	60%	50%
Don't know	3%	6%

5. How important are the following statements to you as regards the music that is played at a restaurant?

	16-64 y.o.	16-24 y.o.
The music corresponds with the music I listen to privately		
1 Not important at all	23%	18%
2 Not important	24%	26%
3	27%	28%
4 Important	12%	9%
5 Very important	8%	9%
Don't know	6%	10%

The music matches the business profile or brand

	16-64 y.o.	16-24 y.o.
1 Not important at all	13%	3%
2 Not important	11%	4%
3	26%	25%
4 Important	30%	30%
5 Very important	15%	27%
Don't know	6%	10%

The music is popular and I recognise it from the charts on the radio

	16-64 y.o.	16-24 y.o.
1 Not important at all	42%	36%
2 Not important	23%	24%
3	20%	20%
4 Important	7%	5%
5 Very important	3%	5%
Don't know	5%	10%

The music is played at the right volume

	16-64 y.o.	16-24 y.o.
1 Not important at all	2%	0%
2 Not important	1%	2%
3	5%	10%
4 Important	13%	13%
5 Very important	74%	65%
Don't know	4%	10%

6. To what extent can music in a business in a public place make you:

	16-64 y.o.
Leave	
1 To a very small extent	16%
2 To a small extent	16%
3	19%
4 To a large extent	21%
5 To a very large extent	23%
Don't know	6%

Buy less

	16-64 y.o.
1 To a very small extent	17%
2 To a small extent	17%
3	20%
4 To a large extent	19%
5 To a very large extent	17%
Don't know	10%

Not come back

	16-64 y.o.
1 To a very small extent	18%
2 To a small extent	17%
3	20%
4 To a large extent	19%
5 To a very large extent	19%
Don't know	7%

Recommend others not to visit

	16-64 y.o.
1 To a very small extent	27%
2 To a small extent	18%
3	21%
4 To a large extent	12%
5 To a very large extent	13%
Don't know	9%

7. If you have answered 2-5 under 'Leave' in question 6.

What is it about the music that can make you leave?

Free text answer:

	16-64 y.o.	16-24 y.o.
Too loud / Blocking the conversation	52%	41%
Noisy / Irritating / Dislike the choice of music or genre	44%	51%
Boisterous / Cacophony / Intrusive / Bad quality	4%	2%
Stressful / Exhausting	6%	4%
Offensive / Inappropriate	1%	1%
Nothing / No answer	1%	3%
Other	4%	6%
Don't know	3%	2%

8. How important is it that music is played in the following businesses?

	16-24 y.o.	45-64 y.o.
Shop		
1 Not important at all	10%	43%
2 Not important	8%	20%
3	23%	26%
4 Important	30%	7%
5 Very important	15%	2%
Don't know	14%	2%

	16-24 y.o.	45-64 y.o.
Gym		
1 Not important at all	1%	
2 Not important	2%	
3	15%	
4 Important	26%	
5 Very important	41%	
Don't know	15%	

9. How important is the music for your experience of a visit at a gym?

	16-64 y.o.	16-24 y.o.
1 Not important at all	5%	1%
2 Not important	6%	7%
3	14%	17%
4 Important	23%	23%
5 Very important	25%	36%
Don't know	27%	17%

10. How would you react if there was no music in the following businesses in public places?

	16-24 y.o.
Shop	
1 Very negatively	10%
2 Negatively	31%
3	31%
4 Positively	6%
5 Very positively	5%
Don't know	17%

	16-24 y.o.
Shopping mall	
1 Very negatively	7%
2 Negatively	25%
3	38%
4 Positively	5%
5 Very positively	6%
Don't know	19%

	16-24 y.o.
Gym	
1 Very negatively	34%
2 Negatively	29%
3	15%
4 Positively	3%
5 Very positively	1%
Don't know	17%

	16-24 y.o.
Hairdresser	
1 Very negatively	4%
2 Negatively	30%
3	37%
4 Positively	5%
5 Very positively	3%
Don't know	21%

11. Has music played in public inspired you to discover new music and artists?

	16-64 y.o.	16-24 y.o.
Yes	30%	51%
No	51%	35%
Don't know	19%	14%

12. How well do you think businesses in public places use music to create a positive experience?

	16-64 y.o.
16-64 y.o.	
1 Not well at all	9%
2 Not well	15%
3	38%
4 Well	16%
5 Very well	4%
Don't know	18%

13. How much do you notice the music that is played in businesses in public places?

	16-64 y.o.	16-24 y.o.
16-64 y.o.		
I hardly notice the music	3%	2%
I notice there is sound	13%	11%
I hear that music is played	44%	29%
I notice the artist or track that is played	26%	36%
I rate my experience by the music that is played	9%	13%
Don't know	5%	9%

14. What is your opinion on the volume of music played in businesses in public places?

	16-64 y.o.
16-64 y.o.	
Erratic	29%
Good	29%
Too loud	30%
Don't know	11%

15. How important is it to you that artists, musicians and songwriters get paid for the music that is played in a public place?

	16-64 y.o.
16-64 y.o.	
1 Not important at all	11%
2 Not important	8%
3	24%
4 Important	23%
5 Very important	27%
Don't know	8%

16. How important do you think it is that businesses in public places pay for the right to play music in their businesses?

	16-64 y.o.
16-64 y.o.	
1 Not important at all	11%
2 Not important	10%
3	24%
4 Important	21%
5 Very important	24%
Don't know	9%

17. How would your opinion of a business change if you found out that they didn't pay for the right to play music in public?

	16-64 y.o.
16-64 y.o.	
1 Very negatively	15%
2 Negatively	25%
3	34%
4 Positively	3%
5 Very positively	3%
Don't know	19%

18. How often do you listen to music at your work?

	16-64 y.o.	16-24 y.o.
16-64 y.o.		
Every day	40%	47%
At least once a week	23%	28%
Sometimes once a month or seldom	11%	8%
Never	23%	10%
Don't know	4%	7%

19. If you have answered 'Every day' or 'At least once a week' in question 18:

How does music played at your workplace affect your wellbeing at work?

	16-64 y.o.	16-24 y.o.
16-64 y.o.		
1 Very negatively	1%	1%
2 Negatively	3%	1%
3	24%	18%
4 Positively	32%	31%
5 Very positively	34%	39%
Don't know	7%	10%

20. Which of the following statements apply to you?

	16-64 y.o.	16-24 y.o.
16-64 y.o.		
I love music at work	26%	48%
I become more productive with music at work	26%	49%
The work environment becomes more relaxed with music	43%	56%
Music at work enhances the fellowship between employees	24%	38%
None of the above	28%	10%
Don't know	12%	12%

Note: Some of the results add up to 99% or 101% due to rounding, and some questions have been put as multiple-choice questions.

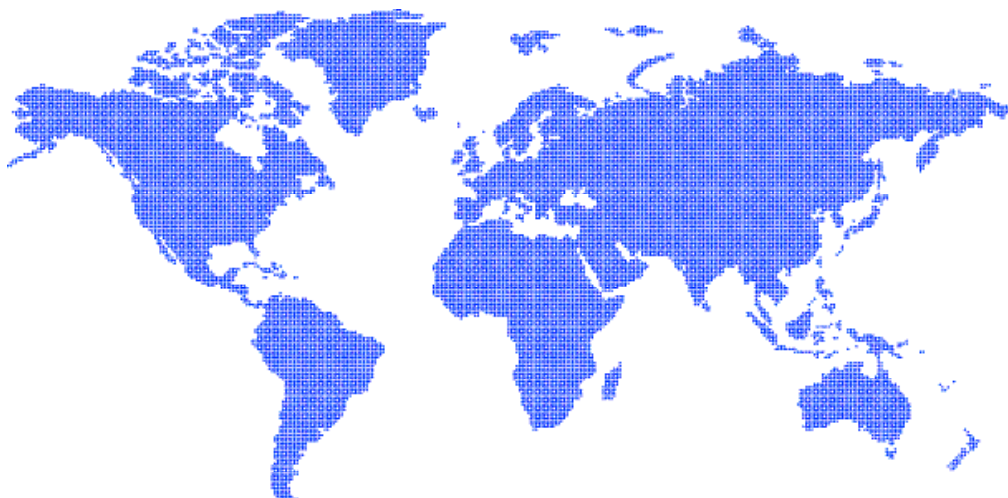
HEARTBEATS INTERNATIONAL

Heartbeats International is a brand and communication agency, specialised in music and pop culture. Global brands like Coca-Cola, IKEA and Unilever are just some of the clients of Heartbeats. Filippa K, Conrad Hotels and Breitling are further clients whose music Heartbeats is responsible for. The agency has its head office in Stockholm. Through the Heartbeats Movement, an international network with experts within music, branding and design, the agency is always up to date with the latest trends around the world.

For more information, visit:

www.heartbeatsinternational.com

www.soundslikebranding.com





HEARTBEATS *international*

Heartbeats International AB

Phone +46 (0)8 501 189 90

e-mail info@heartbeats.fm

www.heartbeatsinternational.com

www.soundlikebranding.com

www.plazapublishing.se

A part of the Plaza Publishing Group