The State of Sonic Branding in SaaS

An Industry Benchmark Report
By Fonetik

Contents

Page 2 - **Executive Summary**

Key Findings

Page 4 – **How the Top SaaS Brands Are Using Sound**

Adoption and Musical Qualities of Sonic Logos
Dominant Tones in Brand Music Beds
Intended Emotions in Brand Music
Musical Structure and Tempos
Use of Custom vs. Stock Tracks
Common Musical Keys
Instrumentation
Musical Genres
Musical Structure and Arrangement

Page 14 - **Sonic Branding Case Studies**

Salesforce
Canva
DocuSign

Page 18 - **Missed Opportunities in SaaS Sonic Branding**

Page 19 - **UX Sound Readiness in SaaS**

Page 20 - **Industry Outlook**

Page 21 - **Methodology**

Page 23 - **About Fonetik**

Executive Summary

As artificial intelligence (AI) and automation continue to change how people interact with software, brands have more ways than ever to craft experiences that feel intuitive and personal.

In today's software-as-a-service (SaaS) industry, lasting differentiation will come from the quality of the experience, not the quantity of features. Sonic branding presents SaaS companies with the opportunity to build trust, strengthen recognition, and express their personality through sound.

And the momentum behind this opportunity is growing fast. The global sonic branding market is projected to grow at a compound annual growth rate (CAGR) of 13.9% from 2025 to 2033, reaching USD 3.32 billion.

Indeed, the software industry is only at the beginning of its journey into sound, which means brands that claim their sonic DNA now, will stand out in an increasingly converging marketplace.

This report shows where early adopters can claim their distinctiveness. It's among the first benchmarking studies focused on how the SaaS industry is using sound. We analysed 60 sonic assets across the 25 largest SaaS companies by revenue, covering sonic logos, music beds, instrumentation, and emotional tone.

The aim of the report isn't to suggest that every SaaS brand should sound alike. Instead, it's intended to highlight how the top companies are currently approaching sound, and to identify opportunities for differentiation. By benchmarking the state of sonic branding today, Fonetik aims to give SaaS leaders a clear starting point for strategic investment in audio.

Prepared by
Jamie Thomson

Company
Fonetik

Published
20.04.2026

Key Findings

The adoption gap

Only 16% of the top 25 SaaS companies use a sonic logo, leaving 84% without a proven tool for strengthening brand recall. This leaves the field wide open for early adopters to establish ownership of sound cues and benefit from stronger brand recall.

The consistency problem

Even among those companies with sonic logos, application is inconsistent. Many brands use them once or twice but fail to integrate them across channels, limiting recognition.

Opportunity in custom music

Nearly half (48%) of SaaS companies rely on stock tracks, while the other half are investing in custom sound. This shows a clear path toward stronger brand equity for those choosing bespoke music.

Emotional clarity

Across the sector, three emotions dominate: Focused (88%), Inspired (84%), and Empowered (84%). This shows a clear sense of how SaaS companies want to be perceived. The opportunity is for brands to expand into complementary emotions that would set them apart.

Genre convergence

Nearly half of SaaS brand music assets fall into the Electronic or Funk genres. The opportunity is to personalise these familiar genres or blend them with others to create a more distinctive identity.

How the Top SaaS Brands are Using Sound

The Fonetik Benchmark Model™ is a cross-industry sonic branding evaluation. By applying a consistent analytical lens, it highlights where companies are succeeding with sound, and reveals where opportunities remain.

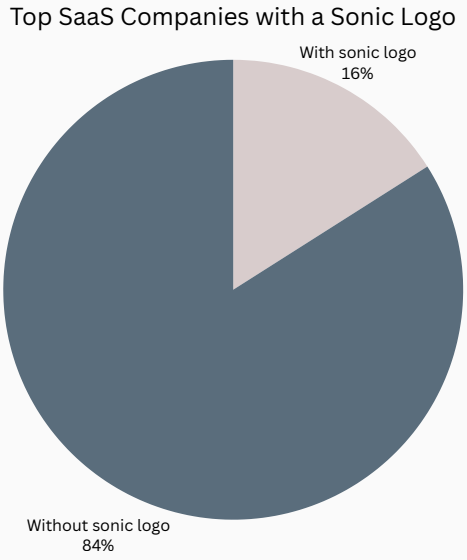
Our analysis of the top 25 SaaS companies reveals a sector still at an early stage in defining its sonic identity. While some brands are beginning to invest in recognisable audio signatures, the majority remain inconsistent or underdeveloped in their use of sound.

However, patterns do emerge. From the emotional tone of audio assets to the instruments that dominate production, SaaS brands show a clear tendency toward certain musical choices. These tendencies shed light on how the sector perceives itself and how it wishes to be perceived by its audience.

When considered as a whole, these findings provide a benchmark for the state of sonic branding in SaaS today, highlighting what's working and where there's room for increased brand recognition.

Adoption and Musical Qualities of Sonic Logos

A sonic logo is a short, distinctive piece of audio, often 2 to 5 seconds long that functions like a musical equivalent of a visual logo. It's typically used at the beginning or end of videos, adverts, or product interactions to create instant brand recognition.



Only 4 out of the 25 SaaS companies analysed use a recognisable sonic logo, representing 16% of the sample. The lack of sonic logos in SaaS likely reflects two common realities. First, many SaaS companies see their brand as product-driven, prioritising visual identity and UI design over audio.

Second, the market is crowded with tools and platforms that compete on features rather than long-term brand equity, meaning investment in strategic assets like a sonic logo is often deprioritised.

Across the four documented sonic logos, we found no single dominant key or tempo. The set spans A major, E ♭ major, D major, and F minor - a mix that shows both major and minor tonalities in use.

The average tempo sits around 110 BPM, with examples ranging from 89 to 147. These findings suggest a preference for bright, accessible tonalities overall, but also hint at occasional departures into more serious or grounded moods.

Instrumentation across sonic logos also shows a clear bias toward clean, synthetic timbres such as digital mallets, plucks, and ambient pads. These sounds typically suggest clarity, precision, and professionalism, which are qualities SaaS brands often emphasise in their visual and verbal communication.

More expressive instrumentation, like choir, brass, or percussion-led arrangements, is rare, suggesting (perhaps unsurprisingly) a preference for minimal, tech-oriented palettes over emotionally dramatic soundscapes.

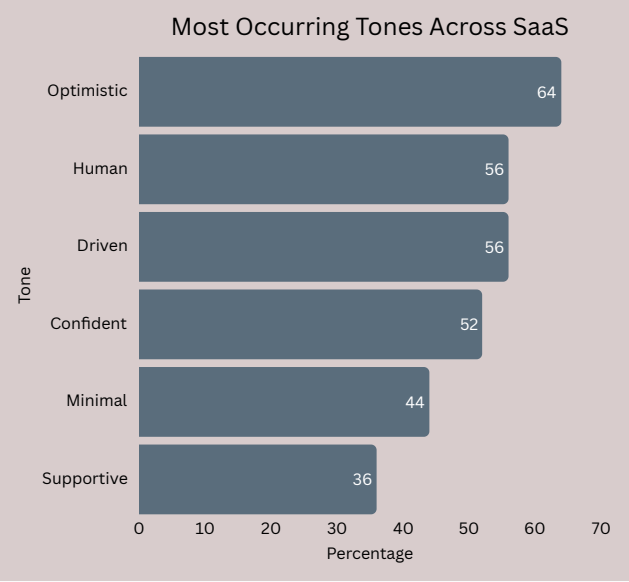
For the few companies that have adopted sonic logos, the benefit is that they have a consistent audio signature that reinforces recognition across video content, product walkthroughs, and advertising. In an environment where most competitors remain silent, these brands stand out by default.

With AI commoditising features and user interfaces looking increasingly similar, sonic logos offer a relatively untapped way to differentiate. A distinct and consistent audio identity can strengthen recall, increase trust, and support a more human connection with users.

Early adopters are likely to benefit most, as they can establish ownership of sound cues in a market where competitors have yet to act.

Dominant Tones in Brand Music Beds

Throughout the report, we use the term music beds to describe the background music SaaS companies use in videos, ads, and product explainers. These differ from sonic logos in that they provide longer, mood-setting tracks that carry the brand's intended emotional effect.



Across the companies analysed, three tones appear most frequently in brand music and background beds: Optimistic (64%), Human (56%), and Driven (56%). These figures include analyses across two beds per company, reflecting the broader emotional landscape that SaaS companies choose to emphasise in their audio.

The emphasis on Optimistic tones could speak to the sector's forward-looking positioning. SaaS companies often frame themselves as enablers of progress, developing tools that make work easier, faster, or more enjoyable. And this outlook is reinforced by music that sounds bright, hopeful, and uplifting.
The prominence of Human tones could indicate a conscious attempt to balance technology with warmth. In a sector often associated with abstraction and complexity, music that conveys empathy helps soften a brand's image and makes software feel more people-centred.

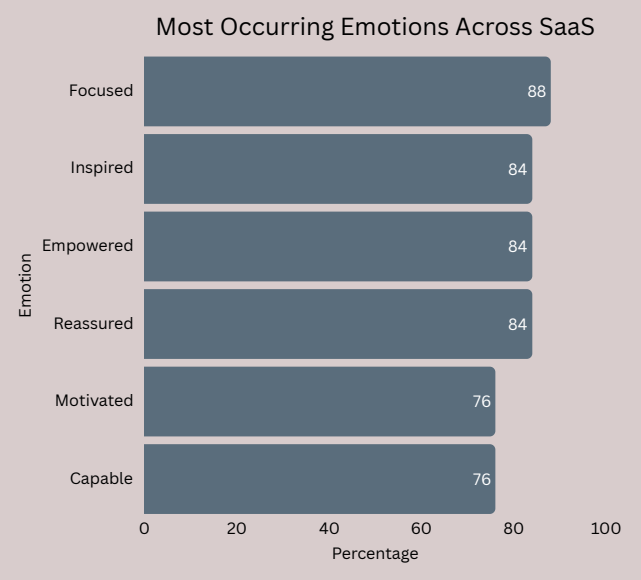
Meanwhile, we might assume that the use of Driven tones underscores the sector's competitive edge. By adopting energetic and propulsive audio, SaaS brands signal efficiency, momentum, and ambition, which are qualities that resonate with both investors and end-users in a fast-moving market.

Optimistic, Human, and Driven tones dominate, aligning strongly with SaaS's positioning around progress, people, and performance. While effective, these shared choices mean that brands need to execute them distinctively to avoid overlap.

Likewise, companies that explore less common (but equally relevant tones), such as Capable, Reassuring, or Innovative, may find opportunities to stand apart while still aligning with industry expectations.

Intended Emotions in SaaS Brand Music

When analysing the emotional qualities projected by music across the 25 SaaS companies, three emotions dominate: Focused (88%), Inspired (84%), and Empowered (84%). These were present in both sonic logos and music beds, showing how consistently SaaS brands align their audio with productivity and progress



The prevalence of Focused music reflects the functional nature of SaaS products. Companies typically want their audio to convey clarity, precision, and concentration, qualities that reinforce the promise of helping users work more effectively.

Inspired is the second most common emotion, suggesting that SaaS brands are keen to move their messaging beyond functionality. By projecting inspiration, these companies tap into the idea of innovation and possibility, encouraging users to associate the software with positive change and ambition.

Meanwhile, Empowered music likely underlines the sector's commitment to user agency. SaaS brands want customers to feel in control, whether they're streamlining workflows, collaborating more effectively, or leveraging AI. The audio is designed to mirror that sense of capability and forward momentum.

Musical Structure and Tempos

Our research shows that most SaaS brand music uses a mid-tempo range, with an average BPM of 100.

This tempo supports a sense of focus and drive without sounding rushed or aggressive, aligning with the sector's preference for clarity and approachability. Faster or slower tempos are rare, suggesting a consistent desire to balance energy with control.

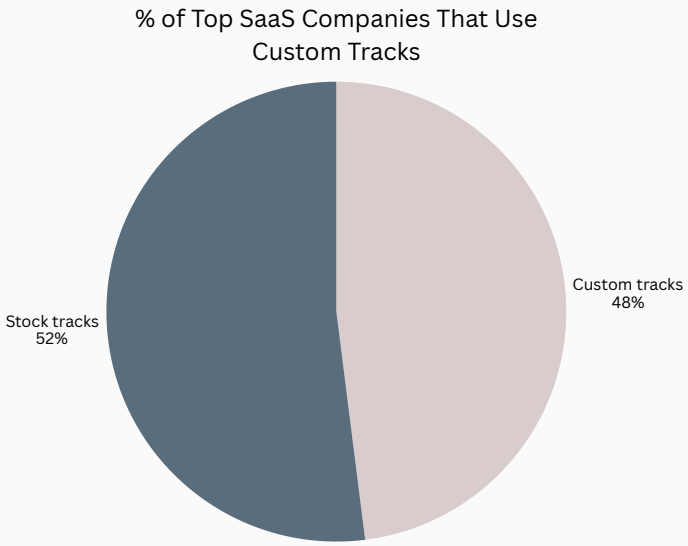
With more than eight in ten brands leaning into Focused, Inspired, and Empowered emotions, we might conclude that the industry is heavily concentrated around a narrow set of values.

While this loop-based, mid-tempo structure is functional and ensures clarity, it also leaves room for brands to experiment with arrangement and pacing to create a more distinctive sound.

Likewise, companies that diversify into complementary emotions like Reassuring, Innovative, or Playful, may find fresh ground to differentiate their brand without straying from core category expectations.

Use of Custom Vs Stock Tracks

Of the SaaS companies analysed, up to 12 (48%) appear to use music that is custom or customised in at least one of their brand beds. The remainder rely on stock or licensed tracks, often sourced from commercial libraries.



It's important to note that "custom" in this context refers to tracks that show evidence of being tailored. For example, this could involve having unique structure, brand-aligned motifs, or UX-style cues, rather than definitive proof of commissioning.

Without access to licensing information, it isn't always possible to distinguish between genuinely bespoke music and modified or exclusive library tracks.

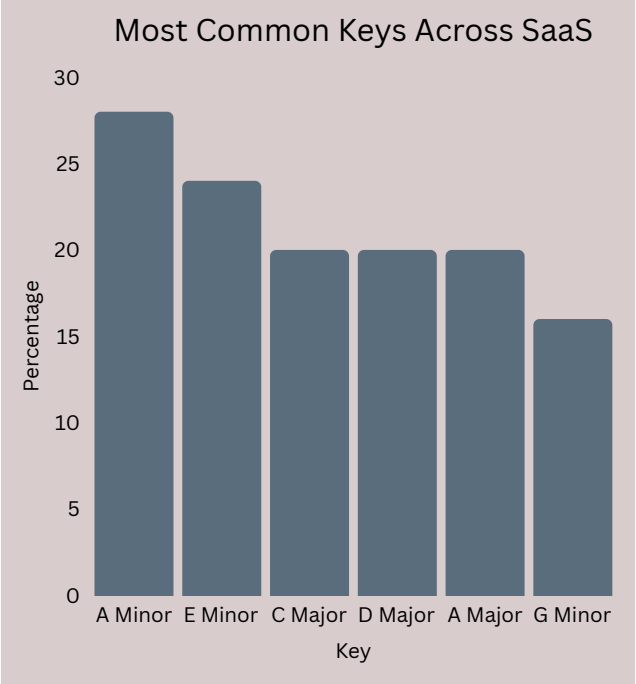
This nuance is significant when compared with the adoption of sonic logos, which sits at only 16%. The contrast suggests that while many SaaS companies are willing to experiment with tailored audio in a tactical way (beds, UX cues, customised tracks), far fewer have invested in building strategic, repeatable sonic assets like logos.

This split shows a sector that's still undecided on whether to treat music as a functional backdrop or as a core brand asset. Using stock tracks offers convenience but limits distinctiveness and long-term ownership.

Moving toward genuinely custom music provides more control, consistency, and differentiation, particularly when paired with strategic assets like sonic logos. Companies that are able to align customisation with a broader audio identity will have the clearest advantage in building recall and long-term equity.

Common Musical Keys

Across the assets we analysed, six keys dominate: A Minor (28%), E Minor (24%), C Major (20%), D Major (20%), A Major (20%), and G Minor (16%). Together, these account for most tracks used across the SaaS companies we researched.



The prominence of minor keys (A Minor, E Minor, G Minor) could suggest a tendency toward sounds that feel serious, focused, and professional - qualities often associated with productivity and concentration.

.

At the same time, the strong presence of major keys (C, D, and A Major) suggests that many companies are equally drawn to bright, accessible tonalities that project optimism and clarity.

It's likely that the spread of keys across SaaS brand music points less to indecision and more to convention. A minor and E minor dominate, giving many tracks a focused, professional edge, while C major and D major inject a brighter, more accessible quality.

What emerges is not so much a single mood, but a palette of familiar tonal choices that anchor SaaS brands in clarity and usability.

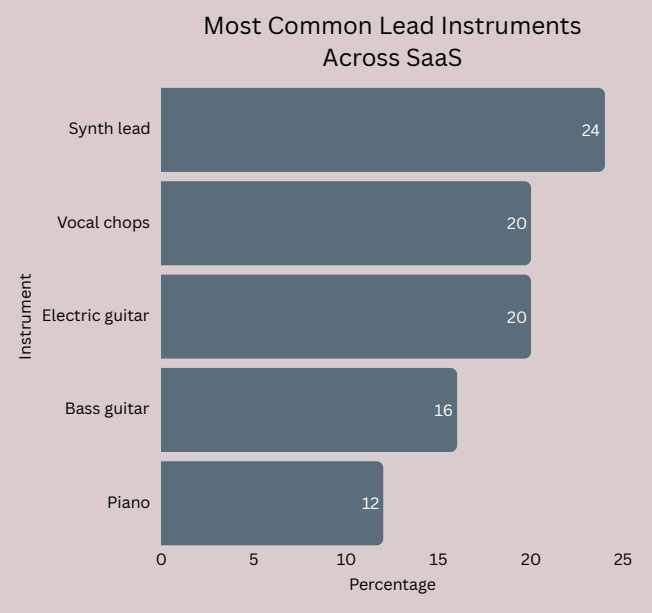
Rather than seeing this clustering as a weakness, it highlights the sector's reliance on musical stability - tonal centres that are easy to process and are globally recognisable.

The opportunity lies in how brands combine these familiar keys with other elements such as instrumentation, rhythm, or texture to create distinction.

In practice, differentiation may come less from adopting exotic modes and more from how confidently a brand applies these common tonalities as part of a broader sonic system.

Instrumentation

The choice of instruments says a lot about how SaaS companies want their music to be perceived. Across the 25 brands we analysed, five instruments appear most often in lead roles: synth leads (24%), vocal chops (20%), electric guitar (20%), bass guitar (16%), and piano (12%).



The dominance of synth leads could be reflective of the sector's alignment with modern, digital sound palettes - fitting for products positioned as innovative and technology-driven.

Vocal chops, on the other hand, add a human texture without the need for full lyrics, bridging the gap between technology and humanity. Electric guitar is also a notable presence, lending energy and familiarity to what might otherwise be a purely synthetic soundscape.

When it comes to supporting instruments, the picture is more uniform. Rhythmic foundations dominate: kick drums (80%), snares (68%), and hi-hats (52%) appear in most tracks, reinforcing momentum and drive.

Textural layers such as risers and synth pads are also common, helping to create lift and atmosphere. These elements keep music engaging but also point to a reliance on familiar production tropes, which risks creating sameness across brands.

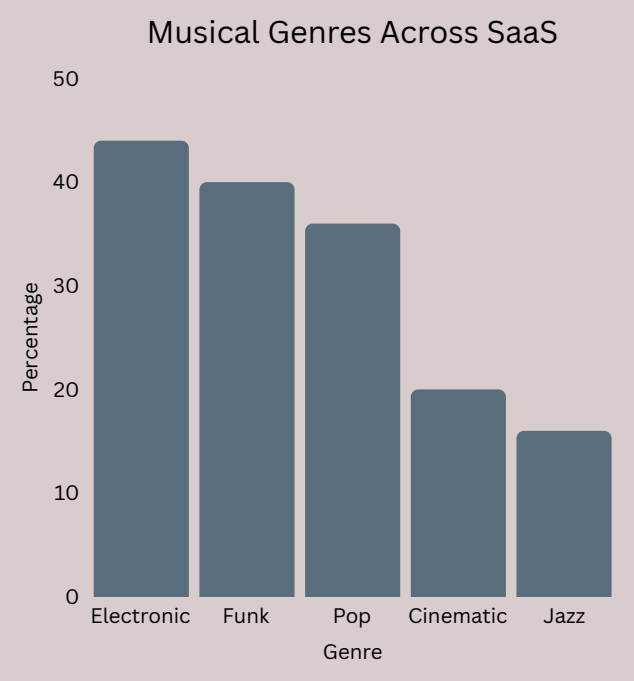
The frequency at which the same lead and supporting instruments appear suggests that many SaaS brands are drawing from the same contemporary electronic-pop toolkit.

While this ensures accessibility, it also increases the risk of interchangeability. Companies that experiment with distinctive instrumentation, whether acoustic textures, unconventional synths, or regionally inspired timbres, may be able to establish a sound that's both authentic and unique.

.

Musical Genres

Across our sample, five genres stand out as the most common: Electronic (44%), Funk (40%), Pop (36%), Cinematic (20%), and Jazz (16%).



The strong presence of Electronic and Pop is unsurprising, given their association with modernity and mainstream appeal. We might say these genres provide a clean, digital aesthetic that aligns with technology-driven products.

The prominence of Funk, appearing in 40% of cases highlights the sector's appetite for rhythm and movement. Funk's syncopated basslines and rhythmic drive inject energy and playfulness, often helping SaaS brands convey creativity, dynamism, and a sense of modern cool.

Cinematic music, used by one in five companies, tends to lean on atmospheric builds and orchestral textures to signal ambition and scale. This choice could suit SaaS brands pitching themselves as transformative platforms with wide-reaching impact.

Finally, Jazz, though less common, might reflect a desire for sophistication and distinction. It could suggest some SaaS companies are experimenting beyond mainstream palettes to project refinement and premium positioning.

The prominence of Electronic, Funk, and Pop highlights SaaS brands' preference for genres that project modernity, rhythm, and broad appeal.

These styles are versatile enough to work across explainers, ads, and events, which may explain their popularity.

The next step for SaaS companies is not necessarily to abandon these genres, but to use them more creatively, blending sub-genres, experimenting with production styles, or tailoring arrangements to reflect unique brand values.

In doing so, brands can stay accessible while still sounding unmistakably their own.

.

Musical Structure and Arrangement

Most of the SaaS brand music we analysed relies on loop-based structures with limited harmonic movement.

This approach creates consistency and predictability, helping the music function as a supportive backdrop without distracting from the message in videos or explainers.

Pacing is often managed through subtle build-ups and risers, which add momentum while keeping the overall structure simple.

To avoid monotony, we noted that some tracks introduce counter-melodies, usually plucked strings or piano figures, though these are typically restrained.

A small number of companies experiment more boldly, incorporating culturally specific rhythms or playful timbres, but these outliers are rare in the dataset.

The reliance on loop-based structures shows that many SaaS brands value clarity and predictability in their music.

These steady frameworks make it easier for audio to sit beneath narration or product visuals without distraction. The opportunity lies in subtle innovation, varying layers, pacing builds more dynamically, or introducing counter-melodies.

Even small adjustments in arrangement can enhance memorability and emotional impact while preserving the accessibility SaaS brands depend on.

.

Sonic Branding Case Studies

While the wider dataset reveals broad patterns in how SaaS companies use sound, a closer look at individual brands shows how sonic identities come to life in practice.

The following case studies highlight three companies - Salesforce, Canva, and DocuSign, each of which has invested in structured sonic branding.

- Salesforce demonstrates how a flexible sonic system can scale from product cues to global events.
- Canva shows the impact of integrating sound directly into the user experience, bridging marketing and product.
- DocuSign illustrates how grounding an identity in a simple metaphor like “harmony” can give a sonic system both distinctiveness and meaning.

By examining their sonic logos, music systems, and tonal choices, we start to see how different strategic approaches are shaping the role of sound in SaaS.

Together, these examples illustrate the progress being made and the opportunities that remain for companies still defining their audio presence.

Salesforce

A recognisable sonic identity rooted in warmth and accessibility

Salesforce is one of the few SaaS companies to have invested in a recognisable sonic identity. At its centre is a six-note sonic logo that combines organic and digital textures. A warm, plucked string or pizzicato layer adds bounce and rhythm, while subtle ambient swells in the background provide depth without overwhelming the core melody. We found that Salesforce's sonic logo is written in E ♭ Major at 89 BPM and has a warm, friendly feel, projecting accessibility and optimism.

From product cues to a scalable sonic system

The company's sonic logo first gained traction through the Einstein Voice Assistant project, where ASD Sound Design developed notification sounds to support interactions on mobile and smart speakers[1]. These cues became a foundation for Salesforce's broader sonic language, which were later repurposed across products, events like Salesforce's own Dreamforce, and digital communications.

What sets Salesforce apart is its systemic approach. Rather than treating its sonic logo as a static asset, the company built a palette of sounds and transitional effects that can evolve and adapt over time. This ensures consistency and freshness, and is a balance that few SaaS companies have prioritised to date.

From our own dataset analysis, we found that the company's musical assets tend to cluster around Optimistic, Warm, Driven tones, supported by Reassured, Motivated, Empowered emotions. The instrumentation across the two assets we analysed leans toward a 'live' feel with electric guitar, horns, trombone, and electric bass all identified as primary instruments, supported by kick, snare, and cymbals.

What Salesforce reveals about sound in SaaS

In the wider SaaS benchmark, Salesforce fits the sector's pattern of emphasising Optimism and Empowerment, but it goes further than most peers by embedding these qualities into a structured sonic system rather than relying on ad-hoc music tracks. Where many SaaS companies rely on stock music, Salesforce has established an identity that reinforces its positioning as both innovative and human-centred.

Salesforce demonstrates that a sonic identity doesn't have to be limited to a logo. It shows the value of building a flexible system where a core mnemonic can scale across events, products, and interfaces. For smaller SaaS brands, the lesson is that even modest cues like notifications and product sounds can become the seeds of a broader sonic language if applied consistently.

► **Listen to Salesforce's sonic logo**

.

.

[1] https://www.asdsounddesign.com/salesforce-logo

Canva

A sonic identity built around creativity and inclusion

Canva's rapid growth as a design platform has been matched by an investment in sonic branding, with work spanning sonic branding agencies MassiveMusic[2] and Resonance[3].

The company launched its sonic identity in 2021, and the project won Gold in the "Best Use of Audio Branding" category at the 2022 Transform Awards ANZ. These collaborations produced a sonic logo, a broader sound identity, and UX cues embedded directly into Canva's product experience.

The company's sonic logo was developed by Massive Music, and is rooted in the idea of "empowering creativity for everyone", translating into a bright, uplifting signature designed for global accessibility. Resonance supported the expansion of this system, ensuring consistency across Canva's digital platforms and video communications.

A flexible system with multiple expressions

Uniquely, Canva has two sonic logos[4]. One is in the key of D major at 147 BPM and comprises a three-second ascending melody featuring a choir of voices. Its other sonic logo is in the same key at a slower BPM of 109. It lasts for one-second and consists of a three-note ascending plucked melody with the choir acting as a riser. This sonic palette balances warmth and approachability with the precision and modernity expected of a creative tech platform.

Canva also has a brand theme, or "hero track" that represents the voices in its community. The track is in the key of D Major at 132 BPM and could be described as an uplifting, spirited groove, driven by electric bass, brass melodies, choir vocals, and acoustic drums.

Embedding sound into the product experience

From our own analysis, we found that Canva's sonic assets cluster around Human, Warm, and Innovative tones with supporting emotions of Reassured, Empowered, and Engaged. This echoes Canva's own documented brand values of human, empowering, and inspiring. Across the YouTube assets we analysed, we found Canva's instrumentation to be consistent with its hero track. Electric bass, keyboard, vocal chops, and trumpet were all identified across the two beds.

What makes Canva notable is the integration of sonic branding into its product environment. Notification sounds, transitions, and confirmations are designed to feel seamless within the interface, giving the brand an audible presence at the point of use, rather than in external marketing only - a rare example of bridging the gap effectively between marketing and product.

In the wider SaaS benchmark, Canva mirrors the sector's preference for Optimistic and Human tones but pushes further in embedding those qualities into the product itself. This positions Canva as a platform that sounds like itself in everyday interactions.

Canva shows that sonic branding isn't limited to marketing touchpoints. By weaving audio cues into its interface, the company strengthens recall at the moment when users are actively engaging with the product. For SaaS companies, even subtle integration of sound into dashboards, notifications, or onboarding flows can reinforce identity and improve user experience.

► **Listen to Canva's sonic assets**

{2] https://massivemusic.com/en/work/the-sound-of-canva
[3] https://createresonance.com/portfolio_page/canva/
[4] https://public.canva.site/sonic

DocuSign

A system-led sonic identity grounded in harmony

DocuSign partnered with AMP Sound Branding to create a comprehensive sonic identity that was launched at its annual flagship conference Momentum in 2024[5]. Framed as a “sonic DNA”, the system was designed to scale globally across marketing, products, and employer branding.

The creative concept drew on the idea of harmony, expressed musically through call-and-response phrasing and intertwining elements. This foundation makes the system adaptable, giving DocuSign the flexibility to apply sound consistently across regions and platforms.

A flexible palette across genres, keys, and tempos

From our analysis of DocuSign’s new Sonic Playlist[6], we found that the brand’s sonic logo is in the key of F Minor at 101 BPM, making the company somewhat of an outlier in its use of a minor key in its audio signature.

The company also has documented branded tracks in different styles. It’s EDM track, which comprises brass synths, glitches, synth pads, and trap percussion is in the key of F# Major at 140 BPM. Its Instrumental track is in the key of C# Major at 80 BPM and makes use of plucked strings, piano, electric guitar, glockenspiel, and sampled drums.

The Orchestral version is in G# Minor at 80 BPM and leans more heavily on violins, cellos, and double bass, following the same melody as the EDM and Instrumental versions. Although each branded track has its own key and genre, each one feels distinctly like DocuSign.

Cohesion through concept

From Fonetik’s analysis of DocuSign’s YouTube assets, we found that the strongest tones were Human, Supportive, and Optimistic. The instrumentation in the first track we analysed from early 2024 comprised jazz-style electric bass guitar and live drums in the key of D Minor at 90 BPM.

The second track however, aligned more closely with the brand’s new sonic identity with electronic synth plucks, pads, and arpeggiators in the key of D major at 101 BPM. These differing palettes demonstrate DocuSign’s more cohesive approach to sound after unveiling its new sonic identity in late 2024.

What stands out about DocuSign’s new sonic identity is the scale and system thinking. Rather than producing a single logo or track, the company built a suite of assets, tied to a unifying concept, allowing sound to be used consistently across touchpoints.

In the wider SaaS benchmark, DocuSign reflects the category’s preference for optimistic and human-centred tones but goes further by grounding its sonic identity in a core metaphor of harmony. This conceptual anchor gives the brand a rationale that sets it apart from many peers.

DocuSign shows that a compelling sonic identity doesn’t have to be abstract. By rooting its system in a simple metaphor tied to its product (agreements), the company created a versatile yet meaningful sound world. For SaaS companies, connecting sonic choices back to brand purpose, even in subtle ways can make audio assets more memorable and defensible.

► **Listen to DocuSign’s sonic assets**

[5] https://ampsoundbranding.com/work/the-sound-of-docusign
[6] https://brand.docusign.com/sound

Missed Opportunities in SaaS Sonic Branding

Adopt sonic logos as a differentiator

With only 16% of the top 25 SaaS companies using a sonic logo, most of the sector is silent. A short, recognisable audio signature is one of the simplest and most effective ways to build recall and trust. Early adopters can own cues that competitors haven't claimed.

Expand beyond a narrow emotional palette

SaaS audio heavily clusters around Focused, Inspired, and Empowered. While effective, these values risk blending together. Companies can stand out by exploring equally relevant alternatives such as Capable, Reassuring, or Innovative.

Experiment with arrangement and pacing

Mid-tempo, loop-based structures dominate SaaS brand music. They work well for clarity, but variation in layering, pacing, or counter-melodies can make tracks more distinctive without sacrificing accessibility.

Invest in custom music for long-term equity

Nearly half of SaaS companies rely on stock tracks, which undermines ownership and makes brands sound interchangeable. Moving toward genuinely custom compositions provides greater control and consistency, especially when tied to strategic assets like sonic logos or UX cues.

Align sound with brand purpose

Design-led SaaS platforms in particular, have a natural fit with sonic branding but often lack a recognisable audio identity. Building even a modest system of cues and music beds allows these companies to reinforce creativity and storytelling through sound.

UX Sound Readiness in SaaS

Our analysis shows that while music beds and occasional sonic logos appear in public-facing assets, UX sound is rarely visible in public-facing assets, suggesting most brands haven't extended sonic branding into their products.

Few SaaS companies use distinctive audio cues in product walkthroughs, explainer videos, or interface recordings. This suggests that most brands have not yet extended sonic branding into the places where users interact with their products every day.

This absence is striking because UX sound is one of the most natural applications for SaaS. Notification tones, confirmation sounds, and error cues already exist in many platforms, but they are rarely branded or consistent. By leaving these cues generic, SaaS companies miss an opportunity to reinforce identity and improve the user experience.

Where UX sound could add value:

- **Marketing touchpoints** – YouTube videos, social media, podcasts, webinars, and events all benefit from consistent audio signatures.
- **Product environments** – Onboarding flows, notifications, dashboards, confirmation messages, and even error sounds can all carry subtle branded cues.
- **Community and culture** – Branded sound can extend into conferences, hybrid events, or podcasts, creating a consistent experience for customers and partners.

For SaaS companies, the potential lies in connecting the dots between these touchpoints. A sonic logo might open a video, the same motif could underpin a webinar theme, and a variation could play as a notification in the product dashboard.

This creates a throughline that strengthens recall and gives users the sense that the brand is present and consistent, wherever they encounter it.

Of course, this might mean that most of the sector simply isn't ready for UX sound, but that's precisely the opportunity. SaaS companies that act early can claim ownership of cues their competitors haven't considered.

A structured approach ensures these sounds are not gimmicks but part of a system that supports recognition, trust, and user satisfaction across all channels.

Industry Outlook

Our analysis of the 25 leading SaaS companies shows a sector still at an early stage in building sonic identities. With only 16% adopting sonic logos and 84% relying on generic or inconsistent music, the opportunity for differentiation is wide open.

The broader sonic branding space is growing quickly and its effectiveness is proven. According to Veritonic's report, The Audio Advantage, 58% of listeners reported that a brand's sound identity is more memorable than its visual counterpart[7].

In advertising, the impact is also measurable. According to research by IPSOS, ads that incorporate audio brand cues are 8.5× more likely to land in the top tier of branded attention metrics[8]. And in one documented case, six months after launching a sonic logo, the brand Tostitos reported a 38% increase in recall[9].

As SaaS becomes increasingly commoditised, differentiation will depend less on features and more on experience. User interfaces converge, product designs look familiar, and AI accelerates feature parity. In this environment, sonic branding offers a rare lever to humanise interfaces, reinforce trust, and make interactions more memorable.

Sound is an experiential asset that can flow across every touchpoint, from product onboarding to YouTube campaigns, social media posts to live events. SaaS brands that invest in audio now can stand apart from competitors and build long-term equity in assets that can scale as they grow.

In a sector where most companies are audibly silent, those who develop a coherent sonic identity will own the emotional and auditory cues their market will come to value.

[7] https://www.veritonic.com/blog/the-audio-advantage-elevating-brand-experience-through-sound/
[8] https://brand.docusign.com/sound
[9] https://www.marketingdive.com/news/tostitos-sonic-branding-advertising-tone/634560/

Methodology

This report applies the Fonetik Benchmark Model™, a structured framework developed by Fonetik to evaluate how leading companies use sound in their branding. The model assesses presence, consistency, tone, and instrumentation across publicly available assets. It is not a neuroscientific or clinical study. Interpretations are based on defined tonal and emotional criteria applied consistently across brands.

Why YouTube?

To ensure consistency and accessibility, our analysis focused on branded video content hosted on official YouTube channels. YouTube was selected over other social platforms because it offers:

- The largest and most permanent repository of brand videos.
- High-visibility content that reaches consumers, customers, and stakeholders globally.
- A stable archive for longitudinal comparison across companies.

This scope doesn't capture every sonic asset a brand may use internally, such as in-app sounds, customer support flows, or closed-platform events, but it reflects the sound most widely experienced by audiences.

Asset Selection

For each of the 25 SaaS companies, we analysed two flagship videos:

1. A brand overview or explainer video with the highest view count (released within the last 12 months).
2. A secondary video, typically a product demo or campaign spot, chosen for recency and engagement.

If no branded video content was available, homepage media was used. In cases where no suitable assets could be found, the brand was marked as audio-inactive.

Assessment Process

Each selected asset was analysed manually by a human analyst, and in some cases, supported by AI. The analyses covered:

1. Sonic Logos

- Presence and consistency were prioritised over one-off appearances.
- For companies marked as having a sonic logo, at least one public video reference was included. Where unavailable, agency case studies (e.g. ASD Sound Design, AMP Sound Branding) were cited.
- Musical key and tempo were recorded when identifiable. If not, assets were labelled Undisclosed/Tonal or Not Publicly Confirmed.

2. Music Beds

- Each video was assessed for tone, instrumentation, tempo, and key*.
- Tempo and key were determined through a combination of human listening and AI-supported tools (e.g. Tunebat).
- Beds were further categorised as custom (appearing tailored to the brand, often incorporating UX-aligned cues) or stock/licensed (generic library tracks).

*Musical key and tempo alone do not determine memorability or effectiveness. They are included here to identify sector-level patterns rather than evaluate creative quality.

3. Tone and Emotional Effect

- Judged exclusively by a human analyst to ensure credibility.
- Options for tone included: confident; human; optimistic; minimal; playful; serious; warm; calm; energetic; professional; innovative; supportive; friendly; trustworthy; driven.
- Options for emotion included: uplifted; reassured; energized; focused; motivated; relaxed; inspired; safe; curious; excited; empowered; reflective; engaged, capable; peaceful.

4. Instrumentation

- Lead and supporting instruments were identified through human listening.
- Lead instruments included synths, guitars, piano, and vocal chops; supporting instruments included percussion, pads, risers, and bass elements.

5. UX Cues

- UX cues were recorded only when visibly implied within branded videos or product walkthroughs (e.g. taps, transitions, confirmations).
- Categories included: tap/click, transition, confirmation, notification, error/reject, onboarding, completion.

6. Genre Classification

- Each asset was assigned a genre label (e.g. Electronic, Pop, Cinematic, Funk, Jazz).
- Classification was based on dominant style, instrumentation, and production feel.

Limitations and Future Opportunities

This study focuses exclusively on publicly available branded videos. As such, it doesn't account for sonic assets deployed in internal environments such as app notifications, IVR systems, or in live event branding. Some companies may have internal sonic systems not represented here.

While this scope limits visibility into embedded UX audio, it ensures consistency across the dataset and reflects the most visible, widely consumed expressions of brand sound.

Future research could expand this analysis by:

- Auditing in-app UX audio through direct product access or partnerships.
- Evaluating multi-channel sonic presence (e.g. podcasts, social media, event branding, customer support systems).
- Testing consumer recognition and recall of sonic elements to measure effectiveness.

Together, these additions would complement this foundational benchmark and provide a fuller picture of how sound supports identity, interaction, and emotion across the SaaS user journey.

About Fonetik

Fonetik is a sonic branding studio that helps companies develop their sonic identity through strategy and audio assets that match their tone of voice, values, and ambitions.

Our process, The Fonetik Framework™, ensures that every project runs smoothly, from first conversation to final deliverable.

1. Discovery

We begin by auditing your existing sonic assets, from product videos and events to in-app notifications and customer touchpoints. We then establish scope, map key interactions, and define what success will look like.

2. Workshop

Through competitor research, brand positioning, and guided listening, we uncover your intended emotional effect and map the qualities that should define your sound.

3. Strategic Principles

We codify your brand's sonic foundations like emotional anchors, tonal directions, and instrumentation preferences to guide development. These principles act as the creative brief for your audio identity.

4. Development

We create your identity, starting with a brand theme that adapts into a wider audio ecosystem like a sonic logo, music beds, UX cues, and event applications.

5. Application Guidelines

Once the system is built, we document it in a set of guidelines to ensure consistency across every touchpoint. This includes usage rules, adaptation notes, and recommendations for future growth.

The Fonetik Framework™ provides a clear, structured path from audit to execution, ensuring that sound is treated as a strategic brand asset, not as an afterthought. By combining analysis, creative direction, and practical guidelines, the framework gives SaaS companies the tools to build a sonic identity that's consistent, scalable, and true to their brand values - ready to resonate across every touchpoint.

Contact

If you’d like to understand how your company compares against the benchmark, or to explore how a tailored sonic identity could strengthen your brand recall, get in touch with Fonetik. We’ll help you turn sound into a strategic asset.

jamiethomson@thisisfonetik.com

https://thisisfonetik.com

Fonetik - Studio 4, Queensferry Street Studios

10A Queensferry Street

Edinburgh

EH30 9AF