

Sound Effects: Finland

The Commercial and Cultural Impact on Sonic Branding in Finland

Foreword: Close Your Eyes.

What is left of your brand when people cannot see it?

That question has been at the center of how I think about audio branding, and it is also why this study is so important. Brands in Finland are used to being judged on substance, not spectacle. They spend years refining what they look like. But the moment the brand is heard instead of seen, they start improvising, handing control of the brand to whoever picked the music that day. And now, with generative AI, there is a tool that makes improvising faster, cheaper, and easier to justify.

That makes Finland a strong place to study the next big question in sonic branding: what happens when AI can generate audio quickly, cheaply, and convincingly enough to sound finished?

At Tunement, we always start from the brand, not from the music. It's not enough to just make something that sounds good. The work is to understand what the brand stands for, translate that into sound, and then build an audio identity that can work across real touchpoints: advertising, social, events, apps, retail, presentations, podcasts, and all the other places where people meet a brand with their ears.

The hardest part is usually invisible. People hear the final cue. They don't hear the brief, the drafts, the wrong turns, the small adjustments, the arguments, the decisions, or the process that makes the final version feel right.

That is why the comparison in this report is so valuable. AI can generate output. But output is not identity. A sonic logo has only a few seconds to carry a lot: emotion, memory, fit, distinction, and some sense that this sound belongs to this brand and not to anyone else.

What this report offers is something the industry keeps asking for and rarely gets: actual evidence. Evidence about what sound does to brand perception, what it helps people feel, what it helps them remember, and where the difference between human-led sonic craft and AI-generated audio shows up.

The findings are not a verdict on AI. They are a map of where human judgment still does work that AI cannot, and where the gap matters most for brand meaning.

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EXECUTIVE SUMMARY

Bespoke vs. AI: What 16 Logos Tell Us About The Future Of Sonic Branding

Sound Effects: Finland is the third report in a research series testing how sonic branding actually performs in practice rather than in theory. Using Implicit Association Testing (IAT), the study compared eight Finnish brands with established bespoke sonic logos against eight Finnish brands paired with AI-generated sonic logos. Each was measured against a no-sound baseline across three outcomes: emotional appeal, memory encoding, and human association.

AI Has Changed What Is Possible. It Hasn't Changed What Is Necessary.

1. AI has earned a role, but not the reins.
AI-generated sonic logos performed surprisingly well but inconsistently. Half produced no brand impact, and one actively hurt the brand. Bespoke work was far more reliable.
2. Bespoke still has the human edge.
Bespoke logos produced a median lift in brand “humanity” nearly three times higher than AI-generated logos. AI can sound finished. Bespoke work is more likely to sound authored.
3. AI optimizes. Humans orchestrate.
AI-generated logos tended to win on one outcome at a time. Bespoke logos were far better at holding multiple brand outcomes in balance at once.
4. Fit beats format.
Both bespoke and AI logos produced standout winners and clear underperformers. What mattered was whether the sound fit the brand, not how it was made.
5. Memorability is not equity.
Sound is unusually good at being remembered. But memorability was unrelated to brand appeal. A sonic logo can become memorable without becoming meaningful.

What This Means

For brands: AI is ready for exploration and prototyping, widening the range of creative directions considered before committing. It is not yet ready to be the final word on a brand's sonic identity, particularly where that identity needs to hold several outcomes at once.

For agencies: Production is getting faster and cheaper. Judgment is not. The agencies and composers who matter most over the next several years will treat AI as an instrument inside a larger creative and strategic process, not a replacement for it.

Sound Effects: Finland was produced by Tunement in collaboration with EmotiSphere Insights, with contributions from Sound Strategy))) and SonicUXR. Read the full report for complete methodology, brand-level results, and the Appendix on using AI to generate short-form sound.

STAT SHEET

8 bespoke sonic logos vs. 8 AI-generated sonic logos, tested against 16 Finnish brands using Implicit Association Testing. All figures are lift over a no-sound baseline.

HEADLINE NUMBERS

Metric	Bespoke	AI-Generated
Emotional Appeal lift (avg)	+13.7 (142%)	+12.4 (91%)
Emotional Appeal — brands with significant lift	5 of 8	4 of 8
Emotional Appeal — brands with significant decline	0 of 8	1 of 8
Memory Encoding lift (avg)	+36%	+36%
Human vs. Synthetic Brand Feel (mean)	+29.1 more human	+21.1 more human
Human vs. Synthetic Brand Feel (median)	+29.3 more human	+10.0 more human

THE MEMORY / MEANING GAP

Correlation	Correlation (r-value)
Memory lift × Emotional Appeal lift	r = .13 (essentially unrelated)
Memory lift × Human Brand Feel lift	r = .15 (essentially unrelated)
A sonic logo can become significantly more memorable without becoming more appealing, more human, or more meaningfully connected to the brand.	

STUDY DESIGN

Parameter	Detail
Methodology	Implicit Association Testing (IAT)
Brands tested	16 (8 bespoke, 8 AI-generated)
Conditions per brand	Baseline (visual only) vs. Lockup (visual + sonic)
Outcomes measured	Emotional Appeal, Memory Encoding, Human vs. Synthetic Brand Feel
Significance threshold	95% confidence interval
AI platform used	ElevenLabs (licensed training data)
Series	3rd report, following Saudi Arabia and Italy editions

Source: Sound Effects: Finland (Tunement × EmotiSphere Insights). Full methodology and brand-by-brand results in the complete report.

INTRODUCTION

Why Sonic Branding Matters Now in Finland

Sound has long helped define Finnish identity. Its musical culture reaches from the runic poetry of the Kalevala to the symphonic language of Sibelius, from the kantele to electronic production, and from Finnish tango to one of the world's most concentrated heavy metal scenes.

More recently, Finland became the first country to create an official national soundscape. Not an anthem in the patriotic sense, but a composed atmosphere built around space, restraint, seasonality, and emotional clarity.

That makes Finland a particularly revealing market for sonic branding. Finnish culture expects sound to have authorship, to feel made for a reason. Sound is expected to have intent beyond sounding traditional, local, or "Nordic" in some generic exportable way. Minimal is fine.

Anonymous is not.

Sonic branding is entering a new phase. The rise of AI-generated sound makes it easier than ever to produce something polished, usable, and superficially appropriate. But the business question is whether that sound can carry enough distinctiveness, emotional fit, and brand-specific meaning to behave like a true brand asset.

Brands increasingly live in contexts where sound does more of the identifying work. Audio is often the first brand cue people encounter and one of the most repeated. Unlike visual branding, sound does not wait for attention. It arrives on its own schedule, often before the brand has been consciously processed.

Finnish brands already live inside this soundscape, whether they have designed for it or not.

Finnish brands deserve better. Not louder sound, or more decorative sound, but sound that projects coherence across every context, including the ones people cannot see. Brands that leave sound to chance will increasingly fall behind those that shape it deliberately.

BUT RATHER THAN ARGUE ABOUT SOUND, WE DECIDED TO MEASURE IT.

This is the third in our Sound Effects series, following our Saudi Arabia and Italy editions. Each report moves the conversation from intuition to evidence. The question is no longer whether sound matters. It is whether consumers can tell the difference between a sonic logo that has merely been produced and one that has been made to mean something.

So, What Did We Measure?

Finland gave us a focused but provocative opportunity: to compare bespoke sonic logos against AI-generated sonic logos in a market where musical craft, technological confidence, and cultural specificity all matter.

To represent brands with established sonic identities, we selected eight consumer-facing Finnish brands with bespoke sonic logos that were readily identifiable and broadly relevant.

To represent the next frontier of sonic branding, we identified eight additional Finnish brands without sonic logos and used AI to generate one for each of them.

SEE THE APPENDIX FOR AN OPTIMIZED PROCESS FOR USING AI TO GENERATE SHORT FORM SOUNDS.

The goal is to measure the opportunity and identify its limits. What can AI-generated sound add? Where can it inadvertently subtract? And when does a sonic logo feel emotionally and culturally aligned with the brand, rather than simply well-rendered? In other words, we're measuring what happens when generation becomes easy, but meaning still has to be earned.

**[INSERT GRAPHIC WITH VISUAL LOGOS HYPERLINKED TO LANDING PAGE WITH
SONIC]**

Measuring Without Asking

This is where most sonic testing quietly goes wrong. It asks people to consciously explain reactions they don't fully have access to or language for. That's why we used Implicit Association Testing (IAT), an experimental technique designed to capture irrepressible subconscious responses without forcing them through the filter of "What sounds good?" or "What should I say?"

In plain terms, IAT is a rapid sorting task that reveals which feelings and ideas people connect to a brand. These effects are referred to as *affective* (how something makes you feel) and *associative* (the ideas it triggers).

IAT quantifies our subconscious response to sound, even when we can't reliably report it. It has been empirically proven to be a more accurate predictor of behavior than traditional explicit / self-report measures.

In practice, we tested each brand under two conditions: the visual logo alone ("baseline") and the visual + sonic logo presented together (what we call a "lockup"). The audio levels were standardized for fair comparison, and the visual and sonic elements were presented simultaneously with consistent timing across brands. The difference between baseline and lockup shows what the sonic logo adds incrementally, not in theory but in measured impact.

To keep this practical, we focused on business outcomes that make a brand easier to choose, harder to forget, and clearer in meaning in a Finnish context.

1. EASIER TO CHOOSE.

Emotional appeal is the instinctive, automatic reaction a brand triggers in the first instant of exposure. Does the sonic logo make the brand feel more inviting and desirable or duller, more irritating, or more confusing? Or worse, simply easier to ignore? This is a foundational metric because emotional response has been shown to be the most reliable research-based indicator of what people do next, including buying decisions.

2. HARDER TO FORGET.

Long-term memory encoding is the extent to which an experience is stored in a way that can be retrieved and influence choices in the future. Sonic logos are encountered repeatedly over time, often in low-attention moments, and their value comes from building a durable link between the sound and the brand. It is a better metric than simple recall since it measures whether the sonic logo leaves a lasting trace, even when people can't describe or summon it on demand.

3. MORE HUMAN IN FEEL.

In a typical audio test, we would measure whether a sound strengthens the brand's associations with a set of brand-specific attributes. But for this study, we focused on a more fundamental question: does the sound make the brand feel more human or more artificial? AI-generated audio can sound polished without feeling emotionally grounded or connected to a brand. In this context, meaning is about whether the sound shifts the brand toward human presence or synthetic distance.

These metrics are not interchangeable and do not necessarily move in the same direction together. Because sonic branding is a system of outcomes to balance, it can't be reduced to a single score for a brand to maximize. That is precisely why measurement matters, and why brands should treat sonic identity with the same seriousness they apply to visual and verbal identity.

KEY TAKEAWAY #1: AI HAS EARNED A ROLE, BUT NOT THE REINS

We came into this study with an admitted bias, so we might as well say it out loud. If you spend enough time around musical craft and brand strategy, you develop a healthy suspicion of anything that promises to compress the messy, iterative work of authorship into a few seconds of output. Part of us expected the AI-generated logos to fall short. Maybe part of us even hoped they would. There is comfort, after all, in believing that taste, intent, and experience always leave an unmistakable mark.

The data made that position harder to hold.

On average, AI-generated sonic logos performed surprisingly well on the core business outcomes. The AI logos produced an average Emotional Appeal lift of +12.4 (or 91% over baseline) compared with +13.7 (142% over baseline) for the bespoke logos^{1*}. Memory Encoding was even more closely matched, with both AI and bespoke delivering an increase of 36% over baseline.

The averages flattered AI to a degree. The AI results were much more variable than the bespoke results. Only half of the AI-generated logos produced a statistically significant lift in their paired brands' Emotional Appeal, and one (Elisa) triggered a significant reduction. By contrast, five of the eight bespoke logos significantly increased brand appeal and none actually hurt the brand.

Nonetheless, AI-generated sound has moved beyond novelty. It can create measurable brand value and, in some cases, perform extremely well (albeit with a worrisome dose of risk). But the numbers describe outputs, not decisions. The harder strategic questions – what the brand should mean, how the sound should behave, whether the final asset feels emotionally right – still sit outside generation itself.

AI deserves a place in the sonic branding toolkit, particularly for exploration, prototyping, and expanding the range of early creative possibilities. But its value depends on what surrounds it. Direction, curation, testing, refinement, and governance.

GENERATION MAY BE FASTER NOW. JUDGMENT HAS NOT BECOME OPTIONAL.

^{1*} The 142% lift over baseline in Emotional Appeal for the Bespoke logos is higher than we noted in both the Saudi Arabia (69%) and Italy (87%) studies; this is almost entirely attributable to significantly lower baseline Emotional Appeal levels for the Finnish brands.

KEY TAKEAWAY #2: BESPOKE STILL HAS THE HUMAN EDGE

Most conversations about AI-generated sound drift toward the sound itself. Can people tell it was made by AI? Does it sound synthetic? Does it feel somehow less expressive, less musical, less alive?

But these are not the questions that brands have to answer. The fundamental issue in sonic branding is what the sound does once it is attached to the brand. In our context, does it make the brand feel more human, or does some trace of artificiality transfer to the brand experience?

Every audio creative has had the experience of playing a sound to a client and watching them react before they can explain why. That instinctive response is exactly where we expected the gap between AI and bespoke to show up. If an AI-generated sonic logo carried even a faint synthetic residue, we expected it might reduce the brand's perceived humanity. Technically accomplished but somehow unconvincing. We expected listeners to sense that difference, even without knowing what they were hearing.

The average was close. The median was not.

Bespoke sonic logos increased the implicit humanness of their brands by +29.1 on average, a statistically significant lift. AI-generated logos also moved in the right direction at +21.1, but the effect was directionally weaker. The median tells an even clearer strategic story: bespoke logos produced a median lift in brand humanity of +29.3, compared with +10.0 for AI.

The gap between mean and median results indicates that AI's performance in this area was not universally weak. Marimekko's AI sonic logo increased the humanness of the brand by +67.5. and Halti's by +35.4. But the broader pattern suggests that humanness is harder to generate reliably than polish, clarity, or memorability.

AI CAN PRODUCE SOUND THAT FEELS FINISHED. BESPOKE WORK IS STILL MORE LIKELY TO PRODUCE SOUND THAT FEELS AUTHORED.

KEY TAKEAWAY #3: AI OPTIMIZES. HUMANS ORCHESTRATE.

The best composers I've worked with can do something that still surprises me: compress a full brand strategy into three seconds of sound. Create something that sounds like this brand, in this category, for this audience, somehow reconciling every contradiction the brief contains. Make it distinctive but familiar. Modern but warm. Ownable but flexible. What makes it genuinely difficult is that all of those qualities have to coexist in the same few seconds. Pull one too hard and the others collapse.

That balance is what the data put to the test, and where the difference between bespoke and AI-generated logos showed up most clearly.

The AI-generated logos performed best when the task was narrow. Among the eight AI logos, five delivered a significant lift in either Emotional Appeal or Brand Humanity, but not both. Finlayson rose sharply on Emotional Appeal at +37.5, while barely moving Brand Humanity at +0.7. Fiskars moved in the opposite direction, with almost no Emotional Appeal lift at +0.4, but a strong Brand Humanity lift of +30.4.

The human-led logos were more likely to balance both outcomes. Elovena lifted Emotional Appeal by +28.2 and Brand Humanity by +33.0. Saarioinen rose by +60.0 and +33.1, respectively. Fiksuruoka by +21.1 and +36.1. Even where Emotional Appeal gains were modest, as with Finnair at +3.8, the sound still added a strong Human lift of +53.5.

Genelec may be the exception that proves the rule. Its bespoke sonic logo improved Emotional Appeal by +17.0 but reduced Brand Humanity by -11.5. (One possible factor is that, as an audio equipment brand, Genelec faces a uniquely demanding audience for sonic branding, but that remains an open question.) Human craft is not magic. But the broader pattern suggests that bespoke sonic strategy is better suited to managing multiple brand outcomes at once.

AI CAN PLAY A MELODY. HUMANS CAN HOLD THE HARMONY.

KEY TAKEAWAY #4: FIT BEATS FORMAT

Just about every sonic branding brief we've worked on devotes far more time to mood than fit – what the sound should evoke instead of whether it will feel right for this brand, in this category. These are different questions, and the gap between them is where sonic logos underperform or fail undetected.

Creative reviews tend to compound the problem. Does it feel premium enough? Is it too safe? Could we make it sound more Scandinavian? Can we try it with different instruments? Why don't we just generate a few more options with AI?

These are personal reactions dressed up as creative direction. They might matter inside the process, but they don't match how people experience brands. People don't hear a sonic logo and analyze its format. They feel instantly whether it fits the brand and the category around it.

We set out to size the performance gap between bespoke and AI. It turns out that the more important gap was between sonic logos that fit the brand and sonic logos that do not. Among the AI-generated logos, Artek's lifted the Emotional Appeal of the brand by +39.8, while Elisa's triggered a decline of -9.6. Among the bespoke logos, Saarioinen's boosted brand appeal by +59.9, while Fortum's left the brand essentially flat at -0.7. Different production routes, same strategic lesson.

Format does not guarantee fit. The data shows both routes producing winners and underperformers. The difference had nothing to do with how the sound was made. The right question in a creative review is whether the sound – whether human or machine-generated – holds the brand together across its category role, emotional territory, consumer expectations, and real-world touchpoints.

FORMAT IS WHAT THE ROOM DEBATES. FIT IS WHAT THE AUDIENCE DECIDES.

KEY TAKEAWAY #5: MEMORABILITY IS NOT EQUITY.

At some point in almost every project, someone asks the same questions. "Will people remember the logo? How long until they associate it with the brand?" The instinct is right. The way most agencies answer it is not.

Across all of our Sound Effects studies, one result keeps appearing: sound is unusually good at leaving a memory trace. No matter the market or whether the asset is bespoke, stock, or AI-generated, audio tends to do something visual identity struggles to do on its own. It gets encoded.

That is why clients care so much about memorability. It is also why recall has become the default metric for sonic testing. The logic is deceptively simple: if people remember the sound, surely the sound is working.

But recall is a narrow and often misleading metric. It captures short-term conscious retrieval, not long-term memory encoding. Worse, it treats all memory as good memory. An irritating sound is likely to have strong recall. A jarring, mismatched, or emotionally wrong sound will be even easier to recall than one that builds equity over time.

The Finland data shows both the opportunity and the danger. Memory Encoding improved for all 16 brands, with an overall lift of 36%. AI-generated logos performed almost identically to bespoke logos on this measure. Even AI-generated sound can help a brand leave a stronger trace.

But that trace was not automatically valuable. Memory lift was essentially unrelated to Emotional Appeal lift, with $r = .13$, and also unrelated to Human association lift, with $r = .15$. A sonic logo can make a brand more memorable without making it more appealing, more human, or more meaningfully connected to the brand.

Memory is powerful, but strategically dangerous when detached from meaning. Sound helps encode whatever emotional signal the brand gives it.

IF THE SOUND IS DISTINCTIVE BUT EMOTIONALLY WRONG, THE BRAND MAY SIMPLY BECOME EASIER TO REMEMBER FOR THE WRONG REASON.

AND...THAT'S A WRAP

Technology is forever changing how music is written, produced, and distributed. Recent transformations include the synthesizer, digital audio workstations, streaming, and now AI. The legal and ethical questions raised by AI-generated music set it apart from those previous transformations, and they deserve their own scrutiny. But what is not in question is this:

AI HAS CHANGED WHAT IS POSSIBLE. IT HASN'T CHANGED WHAT IS NECESSARY.

Across five takeaways, the pattern holds. AI can generate sound that performs. Sometimes remarkably well, sometimes as well as bespoke work. But it performs unevenly. It struggles to balance more than one brand outcome at a time, and it has not yet learned to make a brand feel more human. Bespoke work remains more reliable on the outcomes that matter most: emotional appeal, humanity, and fit. Format was never the right question. Fit was.

For brands, the near-term implication is practical. AI is ready for exploration and experimentation, for widening the range of creative directions a team considers before committing to one. It is not yet ready to be the final word on a brand's sonic identity, particularly where that identity needs to carry weight across many outcomes at once, or where a brand's humanity is the thing most worth protecting.

For agencies, the implication is about where value moves, not whether it disappears. Production is getting faster and cheaper. Judgment is not. The agencies and composers who matter most over the next several years will be the ones who treat AI as an instrument in a larger creative and strategic process, not a replacement for it. Who brief it well. Who evaluate its output critically. Who know when a result is finished, and when it merely sounds finished.

This will not stay still. The brands and agencies who treat this moment as a one-time evaluation will be caught flat by the next one. The ones who build the discipline now — measuring rather than assuming, testing rather than guessing — will be the ones still setting the standard when AI closes today's gaps.

Sound Effects: Finland is the third report in this series. It won't be the last.

WITH GRATITUDE

This study exists because Jarkko Vilska and the team at Tunement were willing to put their own discipline under the microscope. Comparing bespoke work against AI-generated alternatives is not a comfortable proposition for an agency built on craft, and Tunement did it anyway, in their own market, with their own clients' brands as some of the test cases.

What made this collaboration valuable was not just access to data. It was a willingness to be honest about where the results were uncomfortable, where bespoke didn't win as decisively as expected, and where the findings complicated a story the industry might prefer to tell about itself. That honesty is what makes the research worth trusting.

Thank you to Jarkko and the Tunement team for that honesty, and for the care they brought to every stage of this project. Thanks as well to Herwig Kusatz from Sound Strategy))) and Dr. Caitlyn Trevor from SonicUXR for their contributions during the AI logo curation and brand-pairing process.

TUNEMENT

Sound Strategy)))



APPENDIX: USING AI TO GENERATE SHORT-FORM SOUNDS

A study about the value of human authorship in sound has to take its own inputs seriously. Much of AI music generation is built on training data taken unfairly from artists without their consent or compensation. That is the same erasure of authorship that this report argues against. That is why we chose ElevenLabs as our AI audio generation platform.

We believe that Elevenlabs is the most transparent AI music platform when it comes to the provenance of its training data. Their music model is trained exclusively on licensed data, secured through direct agreements with rights organizations including Merlin and Kobalt, with participating artists and songwriters compensated through a royalty structure tied to their contribution. This stands apart from several competitors currently facing litigation over the unlicensed use of copyrighted recordings. While no approach to AI training data is without open questions (e.g., session musicians without direct copyright ownership remain a harder case), ElevenLabs' model represents a meaningfully more accountable standard than most of the alternatives, and that mattered to us in selecting a partner for this research.

We used the following two-step workflow to generate multiple candidate sonic logos for each brand in the study:

First, a large language model was prompted to conduct a deep analysis of each brand and describe its ideal sonic identity, including its tone, emotional character, tempo, instrumentation, structure, and distinctive qualities.

Then, the model was given a second prompt:

“Based on the analysis above, determine an appropriate approach for a sonic logo for the brand, and generate a simple prompt for an AI audio generation model. The prompt should:

- *Describe the sound clearly but simply*
- *Focus on tone, mood, rhythm, and texture*
- *Avoid references to specific artists, songs, or copyrighted styles*
- *Avoid overly complex or layered instructions*

Return only the final prompt.”

A final logo-brand pairing was completed using the expert judgment of sound strategist Herwig Kusatz and music perception researcher Dr. Caitlyn Trevor.

The goal of this approach was to replicate a realistic workflow that a marketer, founder, or brand manager could follow using publicly available AI tools. Rather than heavily refining the results, the process relied on AI to interpret the brand and generate the creative direction. This made it possible to evaluate not only the quality of the generated audio, but also the effectiveness of an increasingly common AI-driven approach to sonic branding.

Key Learnings

The role of the sonic branding professional is shifting from production to strategy, direction, curation, and stewardship. The most important decisions are about why a sound exists, what it should communicate, and how it supports the brand across different touchpoints and over time.

Composition itself is part of that shift. A bespoke sonic identity is not only designed for a specific brand but also creates intellectual property that the brand can own, manage, and build upon. Sound becomes part of the brand's long-term asset base rather than simply a piece of content.

AI is changing what is possible on the production side. It is a powerful tool for rapid prototyping, allowing us to explore a wider range of sonic directions and ideas than was previously practical.

At the same time, current AI systems are better at executing tasks than defining them. They generate outputs without grasping the broader strategic context a brand operates in. They cannot evaluate their own work against long-term business objectives, cultural nuance, or competitive positioning.

For that reason, I do not see AI replacing sonic branding. I see it changing where value is created. The technology will increasingly help create sound. People remain responsible for defining meaning, making judgments, and ensuring what is created genuinely belongs to the brand.