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Once derided, the successors to muzak have grown more sophisticated – and influential – than any of us realise.

By **Jake Hulyer**

The (quiet) rise of background music

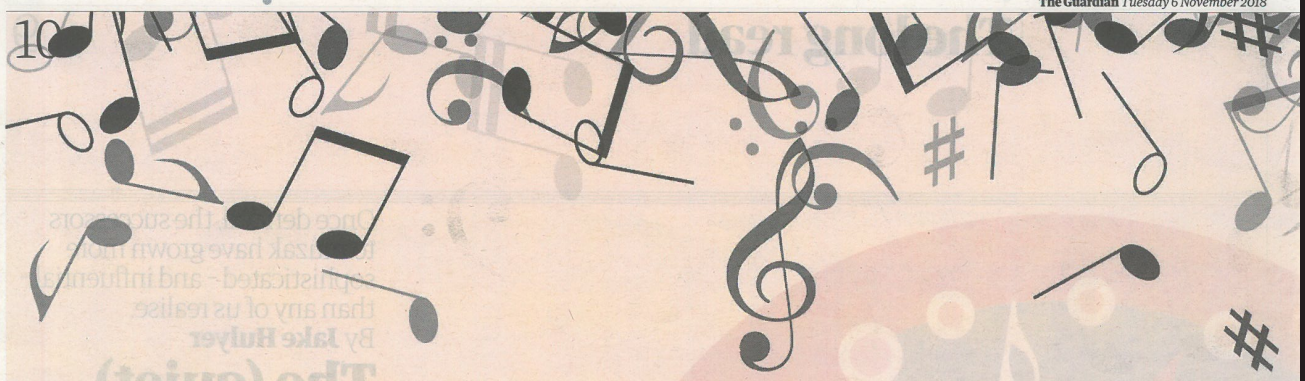
Not long ago, Rob Wood found himself at Heston Blumenthal's house, in south-west London, where he was being persuaded to eat a flower. They were supposed to have been discussing the TV chef's latest project, testing music's effects on the dining experience, for which he had hired Wood to pick the songs. Instead, he was recounting a recent trip to south-east Asia. The flowers on his kitchen table, he said, were from that same trip: he was trying to capture their flavour for a dish. Wood smelled the flowers. Blumenthal, increasingly animated, urged him to take a bite; he wanted the music to capture and complement the flower's exotic qualities. Under duress, Wood had a little nibble.

Wood is the founder and creative director of Music Concierge, a company that chooses background music for businesses. His clients include iconic fashion brands, such as Harvey Nichols and Mulberry, and luxury London hotels, such as the Connaught and the Savoy. Some clients hire Wood because they want to influence individuals' behaviour. When the football club Tottenham Hotspur was looking for music for its new training ground complex, Wood was asked to provide playlists for a holistic programme covering every aspect of Spurs' players' psychological and physical wellbeing. Others seek to create a certain atmosphere, such as the restaurant German Gymnasium, for which he sourced particular bell sounds that evoked Mitteleuropean cafe culture. For another client – a late night, alcohol-free burger bar in Kuwait, which delivers food on a conveyor belt – Wood had to conjure the vibe of a 1980s New York block party, choosing early hip-hop by Grandmaster Flash and lesser-known tracks by James Brown.

Music, even when you are barely aware of it, can be surprisingly powerful. Over recent decades, researchers have found that it can affect how much time we think has passed while waiting in a queue, how co-operative shoppers are with sales staff, and even how sweet or bitter food tastes. One study found that shoppers' preference for French or German wine shifted according to which of the respective countries' traditional music was playing from a nearby set of speakers.

The background music industry – also known as music design, music consultancy or something offered as part of a broader package of "experiential design" or "sensory marketing" – is constantly deciding what we hear as we go about our everyday business. The biggest player in the industry, Mood Media, was founded in 2004 and now supplies music to 560,000 locations across the world, from Sainsbury's to KFC.

The core of a music consultant's work is creating distinct, cohesive musical identities for brands. That can mean allying the brand with a particular heritage, such as the restaurant Dishoom, where food and interiors pay postmodern homage to colonial-era India, and where Wood's playlist features a genre known as "exotica", an American-



born, 1950s style, which refracts world music influences through a western lens. At other times, it can be finding a fresh angle, such as Kenyan restaurant group Nyama Mama, which caters to a young, cosmopolitan clientele and where, rather than just global, American-dominated pop, artists from Nairobi are also played.

One day this summer, Wood and his team were working on music for a new hotel, the Dixon, which is due to open in a converted courthouse near London's Tower Bridge in December. Wood's brief was for distinct playlists for different areas: the lobby, the bar, the restaurant and the gym. Aside from the gym, where the music - sprightly, uplifting club tracks - would remain consistent at all hours, the playlists were to be divided into different "day parts", the choices tailored to either four or five different time periods.

In an office in Shoreditch, the hotel manager and its owners, with the creative agency working on the hotel's branding, walked Wood and his team through every detail of the project: the build materials, the history, the average sum - £23 - they anticipated customers would spend in the restaurant. They spoke about emphasising the culture of the local area, and showed slides that included phrases such as "where your enrichment begins" and "authenticity in every detail". (Authenticity is a word that comes up often in these kind of meetings.) The hotel would be marketed as "premium four star", they explained, designed to appeal to "the discerning executive" and affluent millennials.

After the meeting, there was a trip to the half-finished building site, where the owners pointed out architectural features and Wood, who stayed mostly quiet, appeared to be looking for clues. Much of Wood's job involves taking abstract suggestions - a handful of adjectives, a scattering of reference points, a corporate slogan - and turning them into music. No small amount of intuition is also required. It is common, he says, for clients to speak about being bold or creative. Part of his job is working out what they really want, whether he should deliver something that will precisely match expectations or pleasingly upend them.

The following month, Wood showed me the sample playlists his team had come up with. The hotel's bar was to be in the old courtroom itself, a high-ceilinged room with wooden furniture. The aim with the music there, Wood told me, was to create a sense of loftiness without sounding staid. "They want heritage but they don't want it to be traditional," he said, playing me a gentle, swinging jazz track. The way he explained his process often seemed imprecise, but so, too, was the effect he was trying to achieve: a refined sense of the past that could not be pinned down to any specific period.

For most people, background music means muzak. In the 1920s, George Owen Squier, a former US army officer who went on to earn a doctorate in electrical engineering, developed a new way to transmit audio through wires. His idea led to the creation of a company named Wired Music, which enabled businesses to broadcast music in offices and commercial premises. In 1934, in homage to the wildly successful camera company Kodak, Wired Radio was renamed Muzak.

In its early days, Muzak sold itself on the basis that it could make workplaces more productive. Its programme for offices and factories was structured around "Stimulus Progression", a system invented in the 1940s, where instrumental classical recordings were played in 15-minute sequences, alternated with silence, the music gradually increasing in intensity. In 1956, a report commissioned by Muzak claimed, somewhat implausibly, that its programme had produced an 18.6% increase in production and a 37% decrease in the number of errors made by office employees at the Mississippi Power & Light Company, whose job was to enter meter readings into the company's billing system.

Sonically, muzak set the template for background music that would persist for decades: orchestral instrumentals which referenced classical and, later, popular music. Over time, the name would become a term of derision, synonymous with a kind of dated easy-listening music infuriatingly drifting through every public space. "It's just a kind of amniotic fluid that surrounds us," said communications professor Gary Gumpert in a 1990 documentary. "It never startles us, it is never too loud, it is never too silent; it's always there." It was a balm to sooth awkward silences, gentle encouragement toward a brightened mood. An indication of the popularity it once enjoyed is the radio stations - with names like Easy Listening and Beautiful Music - which brought the format into people's homes.

Although the background music industry has existed for almost a century, it has constantly been reshaped by changes in the way music is distributed. For decades, the industry's ability to deliver music in a non-stop format was as important to clients as the music itself. Each of the background music companies developed its own technology for distributing the music supplied to businesses. For Muzak, it was the transmission through wires it had patented decades earlier; for fellow US-based company 3M, it was a bulky cartridge format, sent through the post and then played through a device also of its own design.

In the 1970s, the introduction of affordable multi-deck tape players - compared to the fiddly steps involved in putting on a vinyl record, or unreliable multi-record changers - suddenly made it easy for businesses to choose and play music continuously. "You couldn't control the market any longer," recalled Peter Standley, who worked at a major UK background music company, Reditune, during that period.

Technology also helped shift the consensus about what background music could be. With cassette players at home and in cars, people became accustomed to listening to whatever they wanted, wherever they were. As early as the late 1960s, companies such as Yesco in the US had started licensing original music from record labels, using the popular songs of the moment, rather than easy listening arrangements which paid reference to them. Over time, this became the norm, including at Muzak, which eventually merged with Yesco. (More recently, Muzak was acquired by Mood Media, and in 2013, its brand name was retired.)

By the time the CD was invented, in 1982, background music was becoming more nuanced. The CD was the first digital format for music and, by the late 1990s, it had enabled background music companies to develop digital libraries - before the likes of iTunes in the early 2000s - where tracks could be organised by highly specific filters. "If you wanted nothing but love songs that were slow tempo, sung by women, that had a saxophone solo, we could create a playlist using our database," said Sean Horton, a former music consultant for PlayNetwork. But that was just a taste of the new world of infinite choice that was to come.

There are two main ways psychologists think about the effects that music can have on us. The first is physical. Numerous studies have confirmed our common sense assumption that we often subconsciously match what we are doing to what we hear. In 1985, for instance, one study found that diners chewed at a faster pace when higher-tempo music was played. (Researchers measured this according to the delightfully named metric, bites-per-minute.) Interestingly, they noted, diners did not finish their meals faster, suggesting that they had actually been taking smaller bites.

The second approach focuses on the associations that music can trigger and how context, such as the environment we are in, affects those associations. One 1998 study found that diners in a cafeteria were willing to spend more money when classical music was played in the background than when there was no music at all. One explanation, researchers suggested, was that diners associated classical music with quality. (In an indictment of the changed fortunes of easy listening music, it elicited a worse response from diners than silence.) Researchers also use the related concept of "musical fit" to understand why people respond to particular music differently depending on the setting.

Wood and his team need to take both of these approaches into account. When the client is a retailer, three words come up time and again: high dwell time. Clients want to keep customers browsing for as long as possible. For one high-end department store, Wood's job was to calm down a busy, hectic environment. Deploying delicate contemporary classical and "intimate vocals", he aimed to make the store a more pleasant place to spend time, while also complementing the upmarket feel of the building. Some jobs require the opposite approach, however. Many hotels do not have capacity to seat all of their guests for breakfast, which means they want to turn tables quickly. In those cases, Wood provides a brisk soundtrack, rather than the more sedate, leisurely sounds you might expect.

One question all music consultants face is just how unobtrusive their selections should be. It is a choice that is sometimes described as between "foreground" or "background" music. Andreas Liffgarden, of Spotify-backed background music supplier Soundtrack Your Brand, drew an analogy between the foreground approach and the way certain fashion labels refuse to pander to their clientele's tastes. "You might not like red trousers," he said, "but I don't give a fuck about that, because red trousers is in vogue in 2018, right?"

For better or worse, most clients are not looking for the musical equivalent of red trousers. Paul Hillyer, head of media at Mood Media's UK business, described the approach his company often takes as "cradle to grave", the least offensive to the widest spectrum of people. One of their clients is Fuller's Brewery, which plays music in most of its 400 or so pubs in the UK. Andrew Durn, whose role at Fuller's involves liaising with Mood Media, described its sound as being roughly like Radio 2, catering to an older, comfortable crowd. "What we don't want," he told me, "is customers walking in, listening to the music and saying: 'What's that all about?'"

It is the strenuously inoffensive nature of this kind of background music that riles up some of the industry's fiercest critics. One group, Pipedown, have campaigned "for freedom from unwanted music in public places" since 1992, when its founder, Nigel Rodgers, was spurred to action by a particularly irritating experience in a South Kensington restaurant. "Do you hate unwanted piped background music?" reads the call to arms on the group's website. "Do you detest the way you can't escape it? (in pubs, restaurants and hotels; on the plane, train or bus; down the phone; ruining decent television programmes;

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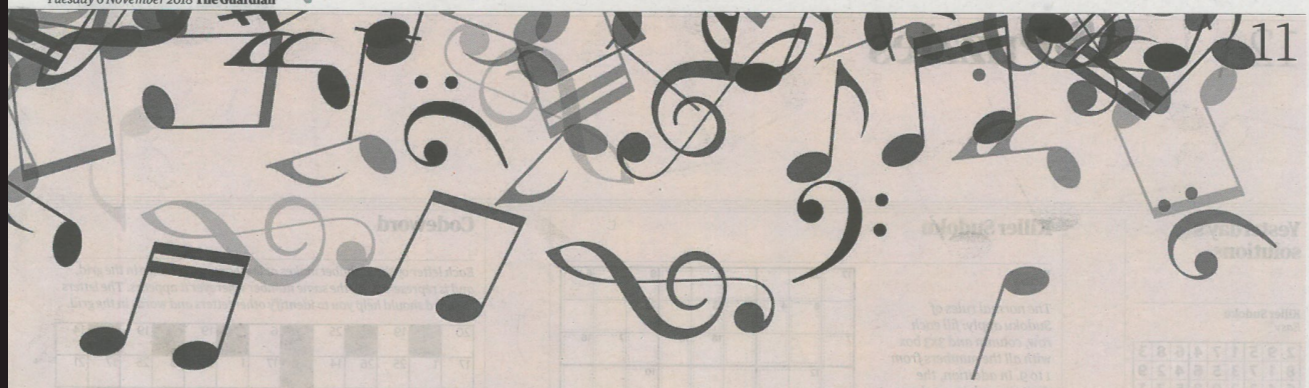

adding to the overall levels of noise pollution in public places)." The group, which counts Stephen Fry and Joanna Lumley among its celebrity supporters, claims some credit for the decision Marks & Spencer took in 2016 to stop using music in its stores. "You're not going for a special sort of atmosphere, you're just going to do your shopping," Rodgers said.

One of Pipedown's boldest claims is that there is "no genuine evidence" that background music increases sales. Opinions vary on this question, although most experts do not share Pipedown's hardline position. Adrian North, a psychology professor at Curtin University in Perth, argues that small purchases are where it is most possible to influence consumers. He conducted the 1997 study that found that shoppers were more likely to choose either French or German wine, depending on which of the respective countries' music they heard, something he contrasted with a decision like buying a car. "I would be astonished," he said, "if someone chose a Renault over a Volkswagen just because you play French music in a showroom."

Others argue that it makes more sense to think about the influence of background music in terms of subtle, long-term benefits, rather than immediate impact on sales. Rhonda Hadi, marketing professor at Oxford University's Saïd Business School, believes companies that provide an experience, such as flights or accommodation, can reap the greatest rewards. "The service itself is so intangible," she said, "that people rely on any cues they can to gauge the quality of the service that they've received."

Hadi says that consumers value this holistic approach more than they used to. Younger consumers, she said, tend to value authenticity, which the marketing industry interprets as a preference for "congruence", the idea that everything should fit with the brand and the story they tell about themselves. While it might not alter someone's decision about which car to buy, the right music, in a particular car showroom, might coalesce with a package of other details to make someone feel good about the hefty sum of money they are about to part with.

One afternoon in July, two Music Concierge staff – music consultant Damon Martin and account manager Morgan Mackintosh – visited Mulberry's Kensington office. They were there to present a sample set of playlists for the redesign of the British brand's flagship Regent Street store. Around the table were Baron Osuna, Mulberry's head of image, and Bradley Taylor, head of visual merchandising and store design. Mackintosh turned her laptop around to display a PowerPoint presentation, which she clicked through as Martin talked.

Music Concierge's brief had been to find music that would match the concept for the store's new design, "British Brutalism", as well as Mulberry's "brand pillars": Britishness; quality; lifestyle; accessibility; real. The plans for the store involved concrete structures planted in the centre of the shop, along with glazed green tiles and Windsor chairs. Phrases used to describe the new design included "British nature", "decorative gestures", and "honest materials".

One of the steers from Mulberry was that it wanted the stores to feel more like a gallery space. In the past, Mulberry had signalled "Britishness" in its stores by playing artists such as the Cure and Joy Division, but for this new design, Martin suggested slightly more avant-garde British artists, such as Brian Eno and Four Tet. (Speaking in a nearby cafe afterwards, Martin recalled different versions of "Britishness" he had come up with for other clients, like Noël Coward for a heritage hotel, or young guitar bands for a high street retailer.)

A song by Digitonal, downbeat and electronic, played tinnily from Martin's portable speakers. "It's on the softer side," he said, "but it has a sense of drama and it builds." Taylor and Osuna listened, nodded, and offered occasional comments. "It might feel a bit sombre," Osuna said. "I think we could approach the warmth through playfulness," replied Martin, picking out a song by Russian artist Kate NV. Ascribing it to "real", the final brand pillar, he said, "There's a sort of eccentricity to it that offers a sense of lightness."

The songs presented to Mulberry were intended to convey how the full playlists would sound. Once a client is satisfied with Music Concierge's concept, the team at the office adds flesh to the bones: the playlist designers, who are junior to the music consultants, search through their internal music libraries to find songs that will make up the playlists' full length, which can number between 1,000 and 8,000. The number mostly depends on how many different sections the client wants to divide their playlist into, and the number of different areas at the location. The cost, per site, can range from about £35 to £250 a month.

Companies like Music Concierge have capitalised on the sweeping changes to the world of retail in recent years. In the face of competition from online retailers, many high-street businesses have sought to repackage shops as a "destination": no longer just a functional place to buy things, they are presented as an experience. The idea of experiential marketing has also taken hold. The business academics Bernd Schmitt and Alex Simonson captured this idea in a prescient book published in 1997: "In a world in which most consumers have their basic needs satisfied," they wrote, "value is easily provided by satisfying customers' experiential needs – their aesthetic needs." Martin Lindstrom's influential 2005 book, Brand Sense, built upon these ideas, hailing the marketing power of sound and scent. He cited Play-Doh, Crayola and Johnson's Baby Powder as the brands with the most recognisable smells. Underscoring music's role in conjuring positive associations, he wrote: "Music makes new memories, evokes the past, and instantaneously can transport you to another place."

Music Concierge was one of several companies set up in the mid-to-late 2000s, responding to these trends, and in particular a greater commercial appetite for music carefully tailored to particular brands. Rob Wood, like many of these companies' founders and employees, had jumped ship from the music and media industries. His trajectory is something of a parable for the way the music industry has had to transform itself – both economically and culturally – in response to the changes wrought by technology.

After graduating from university in the early 1990s, Wood spent a few years DJing and running an arts listings magazine, eventually going on to become editor of the alternative music magazine Jockey Slut in 1999. But, as the internet began to eat away at the magazine industry's circulation figures and advertising revenues, Wood ended up working for an online booking portal for luxury hotels. Reviewing hotels for them, he noticed how often establishments would be playing music that seemed jarring. "They were just putting on what I'd call Cafe del Bula Bar," he told me. "Cliched music, which wasn't appropriate to a boutique hotel in the Cotswolds."

At just the time that the digital revolution was shaking up the music and media industries, businesses were increasingly seeking the skillset that Wood possessed. After a few years of ad-hoc consultancy, in 2007 he founded Music Concierge. Wood is sanguine about his role in pulling music away from the alternative enclaves where he first discovered it. As the music business has tanked, for many the notion of "selling out" has come to seem dated. Selling rights for songs to be used in adverts, TV, videogames, films and public spaces now accounts for a much greater slice of music industry profits. Any artist still reticent about licensing their music may be persuaded to do so by the promise that it will be used in a more sophisticated, artful way than ever before – a change Wood has played a part in: his job, after all, is scuffing the line between commerce and culture. "I'm doing something I've always done," he said. "I've always been driven by introducing people to music they didn't know they might love."

Just as it always has, the future of Wood's industry will depend on how well it can adapt to the pace of change. Since Spotify was founded in 2008, digital sales of music have collapsed, and streaming – on Spotify and its competitors Apple Music, Tidal, Deezer, Pandora and more – has become the way most people listen to music. Everyone can now instantly access most of the world's recorded music online.

For background music companies, streaming is both a threat and an opportunity. On the one hand, music has become easier to access and distribute, meaning that companies like Music Concierge can select, deliver and tweak the music they deliver to businesses with greater speed, flexibility and precision than ever before. On the other hand, everyone now has access to vast music libraries that were once the preserve of a tiny number of hardcore music nerds and people working in the industry. "It went from us being the boutique music expert to having more of a collaboration with the brand," said Sean Horton, who worked as a music consultant at PlayNetwork for over a decade. "Streaming turned everyone into a music expert."

Behind the rise of streaming lurks the spectre of automation. One part of Spotify's appeal is its playlists, where it offers music for particular activities, as well as individualised recommendations. The latter relies on comparing your choices with those of millions of other users, combined with analyses of the raw properties of songs, such as key, mode and tempo. For many people I spoke to while reporting this piece, the algorithms used to provide these recommendations seemed to be a source of anxiety. At the bigger companies, in particular, staff were keen to stress the importance of the real-life curator. Richard Hampson at Imagesound emphasised the intuitive side to his job. "It's always been about feel and human touch," he argued. "Human taste is really important, and the algorithm thing is removing that."

During my visit to his office in July, Wood showed me a playlist he was working on for Gravetye Manor, a hotel we had visited the previous month. Compared to many of his other projects, this one was a minor undertaking: it was for a bar that seats about 20 people. The hotel had just sent some feedback that the music for the evening sounded a little too muted, and he had some ideas for livening it up. He clicked through his laptop, pondering each of the songs' qualities, teasing out how they might fit together. "A bit of Britishness," he said, enthusiastically, picking a track by Richard Hawley; as well as a Marvin Gaye track, "to balance it out with a bit of familiarity". A Shirley Bassey cover of the Doors, her voice crooning out of the laptop speakers was, he explained, "a way of testing the boundary". He paused to listen for a moment, pleased with the choice. ●

✱ **Jake Hulyer** *is a freelance journalist based in London*

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