OneMusic
NEW ZEALAND

Sound Decisions:

Music's Impact on Consumer Behaviour

Walk into any café, hospitality venue or retail store, and you'll hear music. But are you hearing it the way consumers do?

For most business owners, the answer is no. The playlist is often a mix of familiar songs, industry defaults, or staff preferences, but it is rarely considered a strategic asset. Yet our research reveals a surprising truth: Music is not merely decoration. It is a powerful business tool that influences whether customers stay, spend and return.

Picture a tool that costs little to use but influences customer time, spending patterns, and brand loyalty. Imagine that same tool, if misused, could scare customers off and damage your reputation. That very tool is already at your business: your playlists.

Across Australia and Aotearoa New Zealand, about 40% of shoppers have walked out of a store because of the music playing. Conversely, 50% have stayed longer when the sound felt right. These numbers are not unusual; they reflect common consumer behaviour. Yet most venues treat their soundtrack as something left to chance rather than a strategic choice.

In December 2025, OneMusic surveyed 1,250 Australian and New Zealand consumers across retail, hospitality, and service sectors. We asked them what they hear, why it matters, and how it influences their behaviour. The findings were consistent, surprising and actionable.

Across both markets

- Music is the primary driver of first impressions (volume outweighs genre).
- Customers crave comfort more than energy.
- Genre expectations are rigid; matching them builds trust; missing them erodes it.
- Quality signals matter: younger consumers instantly spot generic stock music.
- Compliance with music licensing is viewed as a trust signal, not a burden.

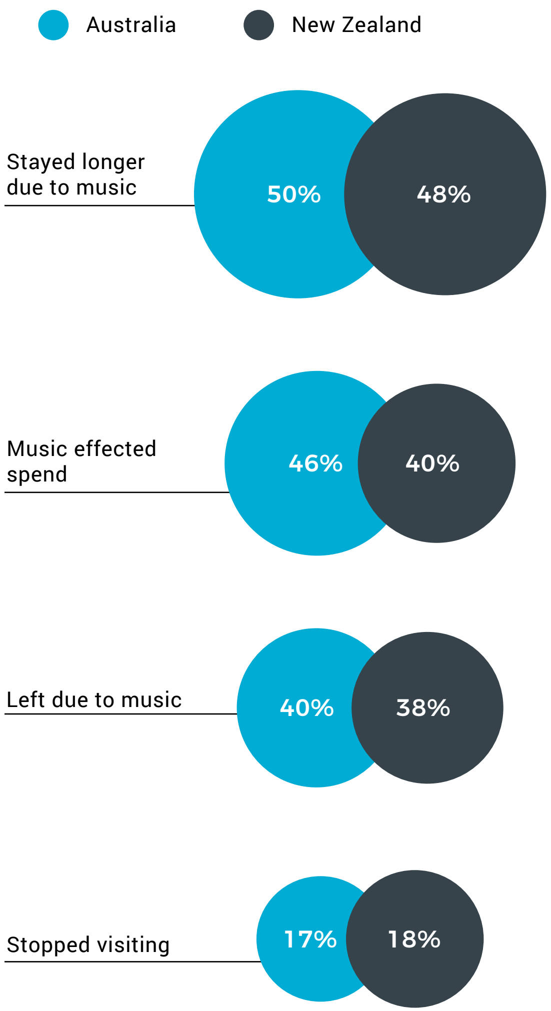
By the end of this insight-led playbook, you will have a framework for using music intentionally; not by chance but as a strategy to boost customer satisfaction, increase dwell time, and unlock revenue.

The playlist principle: How music shapes behaviour and revenue

Music's impact on customer behaviour in AU and NZ

"Stayed longer" responses highest in both countries

Source: Inside Retail x OneMusic survey 2025



In both Australia and New Zealand, music isn't just decoration; it's a behavioural tool that subtly influences whether customers stay, spend and return, or walk out and never come back. The data shows a similar trend across both markets, but with a noticeably stronger effect in Australia.

Across the combined sample, most people recall at least one moment when music influenced their consumption behaviour. When the soundtrack was wrong, they left; when it was right, they stayed and spent.

In Australia, 40% of shoppers report leaving businesses because of the music. In New Zealand, the percentage is 38% – still high enough to pose a real churn risk for any operator. This demonstrates that while New Zealanders may be slightly more tolerant, merchants in either market can't afford to overlook the significance of music.

The benefit is equally clear. In both countries, about half of shoppers say they've stayed longer because the music felt right. Positive soundscapes increase dwell time, leading to more browsing and more opportunities for impulse purchases. This effect is strongest among younger groups, but it's observed across all ages.

A similar trend shows up in spending. Many Australians and New Zealanders agree that they spend more when the music matches their mood and surroundings. In other words, music not only influences how people move through a space but also boosts sales at the counter.

Four behaviours – walking out, staying longer, spending more, and refusing to return – form the core of the music story across both markets.

Age amplifies these dynamics. In both Australia and New Zealand:

- Younger shoppers (under 45) are much more likely to report walking out, staying longer, or spending more because of the music. For Gen Z and younger Millennials, the playlist is part of the offering, not just background noise.
- Older shoppers (65+) are less likely to change their behaviour in response to music, but they remain attentive to comfort: they notice when the volume is too loud, or the atmosphere feels jarring, even if they do not always leave.

This means venues targeting younger, future-critical customers in fashion, casual dining, and youth-focused precincts face a higher commercial risk if they "get the music wrong", especially in Australia, where reactivity is somewhat stronger.

Silence performs poorly in both markets.

A large share of respondents in Australia and New Zealand describe completely silent spaces as "odd" or "flat", suggesting that the absence of music makes the environment feel unfinished or uncomfortable rather than calm. For operators who have chosen not to play music to "play it safe", the data shows not having music is anything but: silence itself is perceived as a negative design choice, not a neutral one.

The overall trend throughout Australia and New Zealand remains relatively consistent.

- Music has a measurable impact on dwell time, spend and loyalty across both markets.
- Australians generally respond more intensely, both positively and negatively, than New Zealanders.

Getting the soundtrack right increases dwell time and boosts spending. Getting it wrong accelerates walkouts and, for a significant minority, leads to lasting customer loss.

The rest of this section explains why consumers respond this way, reacting to mood, comfort and expectation. Later sections offer a practical guide for using sound as a controlled, measurable tool, rather than as a background element, in both countries.

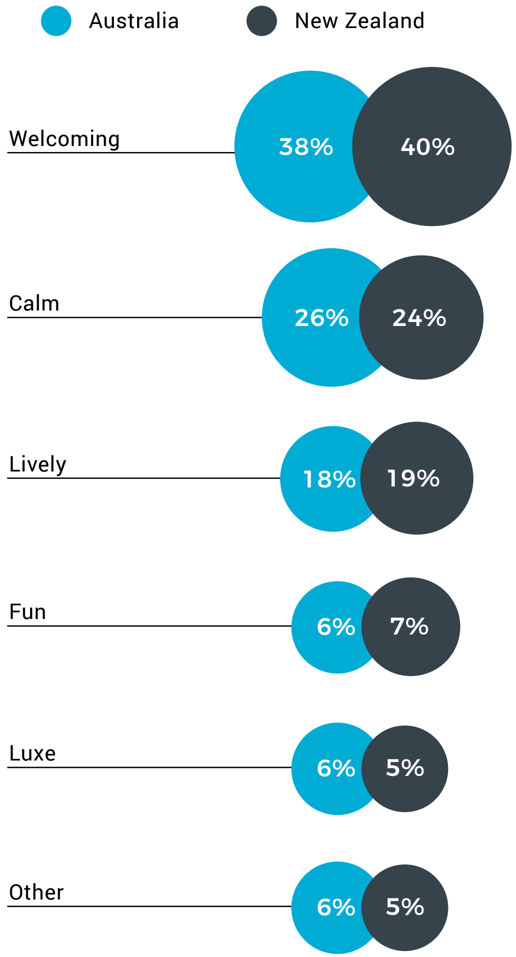
> ***If music is a language, most businesses are mumbling.***

Consumers in both Australia and New Zealand have a refined, subconscious sense of how sound should match a space. When that match is properly made, it creates emotional resonance; when it is wrong, the brand feels disconnected.

Welcoming atmosphere most desired across markets

Both countries also prioritise calm and lively ambience

Source: Inside Retail x OneMusic survey 2025



Contrary to the common belief that customers always prefer high-energy settings, the data reveals a clear preference for comfort. In both markets, the most popular atmospheres are "Welcoming" followed by "Calm".

- In Australia, 38% of shoppers prioritise a welcoming atmosphere, with 26% looking for calm.
- In New Zealand, the preference for "Welcoming" is slightly greater (40%), emphasising the cultural importance of friendliness and approachability.

"Lively" energy ranks a distant third in both countries (18% AU, 19% NZ). This offers a key insight for brands that rely on high-tempo, club-style playlists: Unless you are clearly a high-energy youth brand, you might be over-stimulating a customer base that wants to feel comfortable.

Before customers notice which song is playing, they first hear how loud it is. Volume is the most significant factor in shaping first impressions across both markets, surpassing genre, song familiarity and overall fit.

- Australians (38%) identify volume as the first thing they notice.
- New Zealanders (42%) are even more sensitive to volume levels.

This challenges the notion that curation is solely about selecting songs. The perfect track, played too loudly, becomes noise; played too softly, it seems forgettable. For operators in New Zealand, especially, volume control isn't just a technical detail; it's the main way customers assess the vibe.

> ***Volume control isn't just a technical detail; it's the main way customers assess the vibe.***

When the music feels right, customers in both markets describe their experience with emotional language. Open-ended survey responses indicate that Australians find a good soundtrack makes them feel "relaxed" and "happy". Australians and New Zealanders often use terms such as "chilled" and "comfortable".

In both markets, the playlist's aim is rarely to attract attention. Instead, it acts as emotional glue, smoothing the retail experience, filling awkward silences, and making the space feel familiar and safe.

Actions to take

The "Mood Maps" for Australia and New Zealand, which show the hierarchy of atmospheres (Welcoming, Calm, Lively) customers want music to create and the first elements they notice (volume first), are similar, but the levers vary slightly.

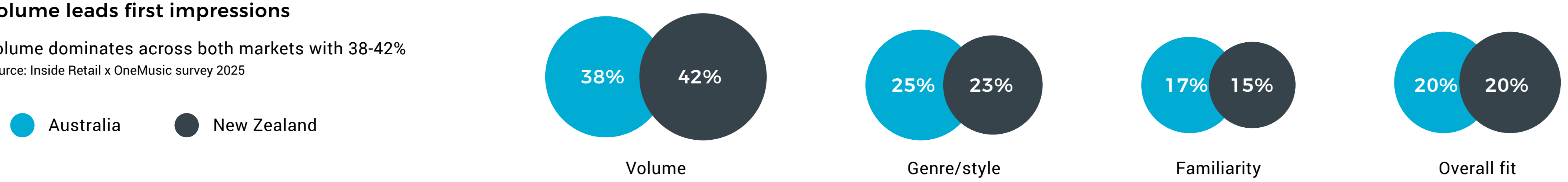
- For Australia: Focus on balancing "Welcoming" and "Calm" energy, but ensure you have moments of "Lively" energy for peak trade.
- For New Zealand: Prioritise controlling volume first. A slightly quieter, warmer, and more "Welcoming" soundscape better aligns with local expectations.

In the next section, we translate these abstract moods into concrete genre choices for every business sector.

Volume leads first impressions

Volume dominates across both markets with 38-42%

Source: Inside Retail x OneMusic survey 2025



The genre expectations blueprint

(Australia vs New Zealand)

While mood (e.g., "Welcoming") is a general feeling, genre is specific. The data in this section acts as a decoder for business owners, translating abstract feelings into concrete musical choices. Across 15 business categories, consumer expectations in Australia and New Zealand are notably consistent. Mismatching these categories is the quickest way to break the customer's immersion.

At the top end of the market

Expectations are in sync across both sides of the Tasman. For Fine Dining and Premium Retail, customers link "premium" with "classical" and "jazz".

- In Australia, 31% of fine-dining patrons expect classical music.
- In New Zealand, expectations are slightly more broad, with greater tolerance for jazz and ambient sounds.

Crucially, pop music is almost universally rejected in this setting. Playing Top 40 hits in a fine-dining venue isn't viewed as "edgy"; it's a category error that undermines the brand promise.

For youth fashion and streetwear

The vibe shifts significantly. Authenticity here involves matching the playlist to the cultural identity of the demographic.

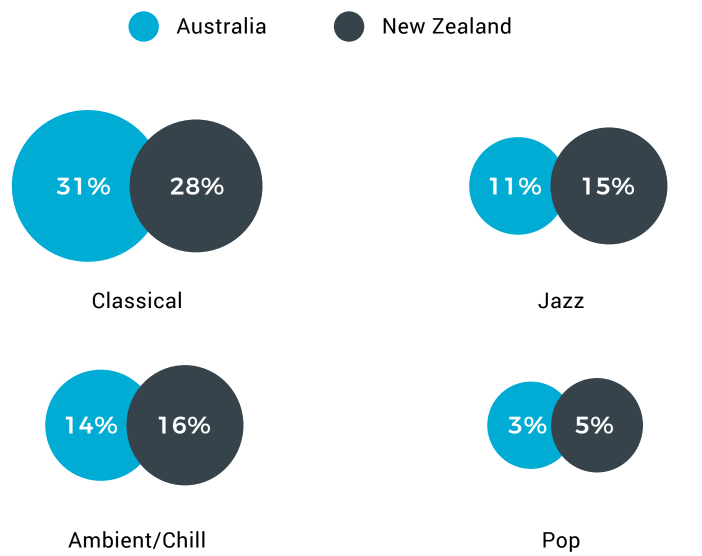
- Australia: Pop leads Youth Fashion (47%), showcasing a mainstream, commercial vibe.
- New Zealand: While Pop leads (42%), there is a notably stronger preference for Hip-Hop and R&B (26% vs 21% in AU) and Local/Indie artists.

This indicates that New Zealand's youth market is slightly more "urban" and "alternative" than the Australian one. Retailers crossing the ditch should tailor their playlists accordingly; a standard Australian pop loop might seem too "commercial" for a trendy Auckland streetwear store, as would an indie-skewed playlist for Australia.

Classical dominates fine dining music in both countries

Australia shows stronger classical preference than New Zealand

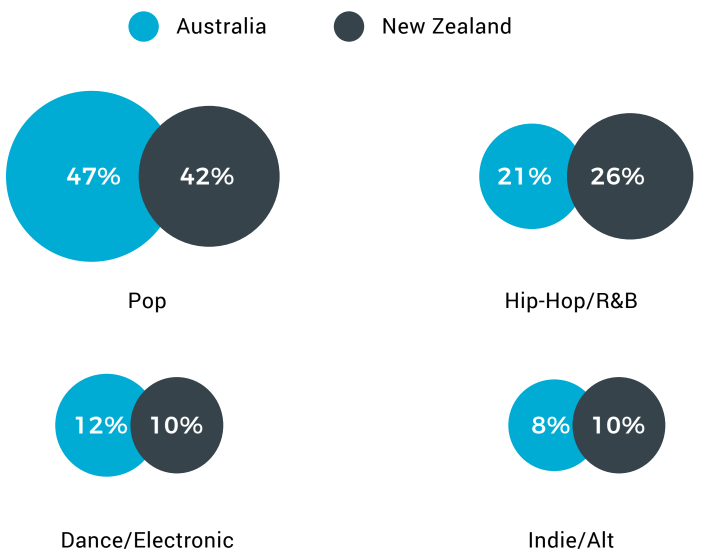
Source: Inside Retail x OneMusic survey 2025



Genre expectations in youth fashion (AU vs NZ)

Pop dominates in both markets, with Hip-Hop stronger in NZ

Source: Inside Retail x OneMusic survey 2025



For spas, wellness and skin clinics

Music serves a physiological purpose: De-escalation. The dominant genres are overwhelmingly Ambient/Chill and Classical. High-energy styles such as Pop and Dance account for less than 15% of preferences in both markets. Silence is also an option, but ambient soundscapes are preferred, to mask clinical noises.

For supermarkets and fashion

Supermarkets and Mainstream Fashion sit in the middle ground. Here, the aim is familiarity. Pop is the safe, expected option (30-40% prefer it in both markets). However, a key difference becomes clear.

- Kiwis show a greater appreciation for "All New Zealand" playlists (local artists) than Aussies do for "All Australian" tracks. The "buy local" feeling is as strong as "listen local" in NZ.

The table summarises the primary and secondary genre expectations for key sectors. Significant differences between Australia and New Zealand are highlighted.

Sector	Primary genre AU	Primary genre NZ	Secondary genre AU	Secondary genre NZ	Key insight
Fine dining	Classical		Jazz		Aligned. Sophistication = Orchestral/Jazz.
Youth fashion	Pop		Hip-Hop		Nuanced. NZ leans more heavily into Hip-Hop/R&B.
Streetwear	Hip-Hop		Pop		Aligned. Urban culture drives the sound.
Spas/wellness	Ambient		Classical		Aligned. Functional relaxation is key.
Supermarkets	Pop		Easy Listening	Local	Nuanced. NZ shoppers value local artist content more.
Casual dining	Pop		Acoustic	Indie	Aligned. Upbeat but unobtrusive.

Actions to take

For operators working across multiple markets, a single playlist can often suit both premium and wellness brands. However, for youth and mainstream retail, subtle localisation that includes Hip-Hop or local artists for NZ can significantly boost perceived authenticity.

The pillars of playlist power: Identity and quality

Your playlist is your sonic logo

Just as you hopefully wouldn't use blackboard chalk for a luxury brand's signage, you shouldn't play Top 40 hits in a fine dining restaurant. The data shows that in both Australia and New Zealand, the playlist directly reflects brand professionalism.

When the music clashes with the brand, the damage is reputational, not just atmospheric. Across both markets, the primary response to mismatched music is a sense of disconnection.

- In Australia, 44% of consumers believe mismatched music makes the brand feel "disconnected" from its identity.
- In New Zealand, the sentiment is similar (40%), but Kiwis are slightly more likely to judge the business as "less professional" (26% vs 24% in AU) or "cheap" (18% vs 15% in AU).

This indicates that New Zealand shoppers might interpret musical missteps as a sign of operational incompetence or budget cuts, while Australians tend to see it mainly as a branding issue. In both cases, about 25% shoppers will actively downgrade their opinion of your business's competence because of your playlist.

> ***On the flip side, alignment pays dividends.***

When the music suits the environment, it acts as a trust signal.

- 43% of Australians and 40% of New Zealanders say it explicitly "improves their impression" of the brand.
- New Zealanders are marginally more likely to regard a well-curated venue as "thoughtful and professional" (18% vs 15% in AU).

This confirms that a curated soundtrack is a cost-effective, high-impact tool for improving brand perception. It transforms a passive environment into an active asset, showing customers that you've considered their entire experience, not just what you are selling.

Actions to take

To define your sound identity, stop asking "What songs do I like?" and start asking "What mood does my customer expect?"

Audit your current playlist against these three questions:

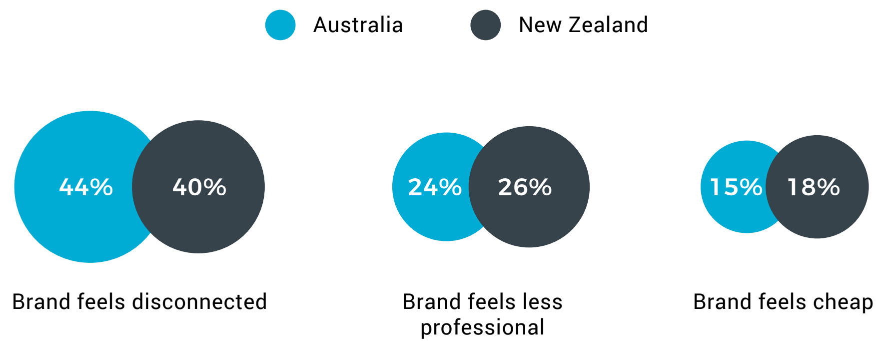
1. Is it category appropriate? (e.g., If you are a Spa, are you playing Ambient?)
2. Is it volume appropriate? (Volume is the primary driver of first impressions.)
3. Is it Culturally Tuned? (Does your playlist reflect the local preference or is it generic US pop?)

For multi-market brands, the strategy is to maintain a consistent vibe while remaining flexible with content. A "cool" fashion brand should sound energetic in both Sydney and Auckland, but the specific tracks in Auckland should nod to the local Hip-Hop/Indie scene to create an authentic connection.

Impact of mismatched music on brand perception

Disconnection is the primary concern in both markets

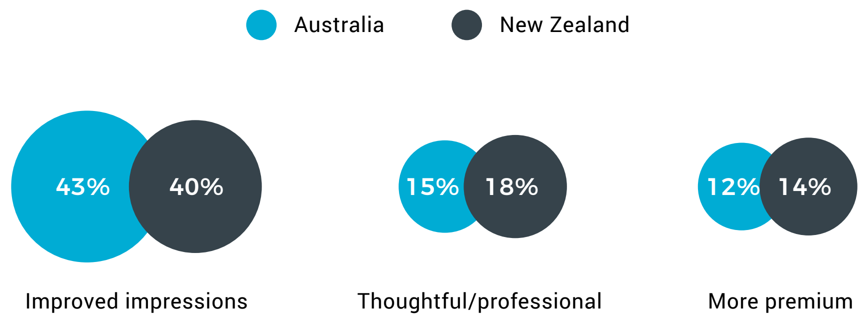
Source: Inside Retail x OneMusic survey 2025



Impact of well-matched music varies by country

Both nations value an improved impression most

Source: Inside Retail x OneMusic survey 2025



Build your in-store soundtrack

(Australia vs New Zealand)

Creating a soundtrack isn't just about selecting genres; it's about how you deliver it. Even the perfect song, played at the wrong volume, can clear the floor. Here's how to establish your sound identity across both markets.

> ***A common trap for businesses in both Australia and New Zealand is to cut costs by using royalty-free or generic stock music.***

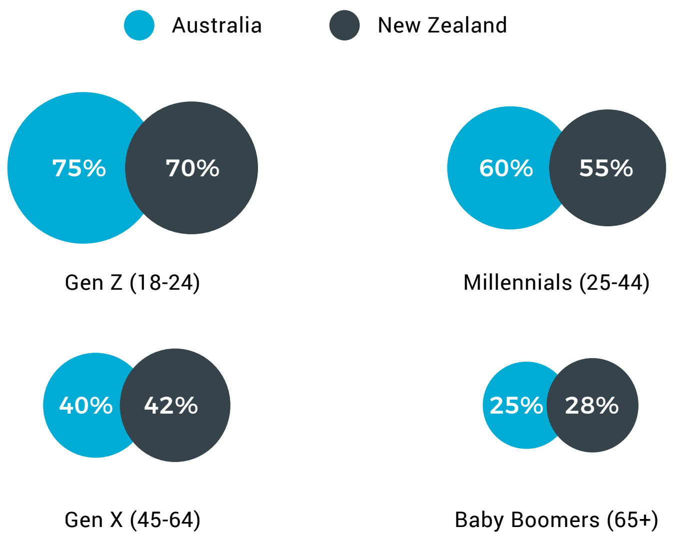
The data shows this is a false economy, especially if your audience includes anyone under 40.

- Australia: 75% of Gen Z consumers can instantly tell the difference between "real" music (artists they know) and "elevator music" (generic stock tracks).
- New Zealand: The detection rate is similarly high (70% for Gen Z).

All generations detect real music

Gen Z leads in detecting real vs stock music across both countries

Source: Inside Retail x OneMusic survey 2025



For younger customers in both markets, hearing generic tracks indicates that the experience is "budget", "uncool", or "inauthentic". If your brand is about quality, your playlist must feature quality artists.

The volume verdict

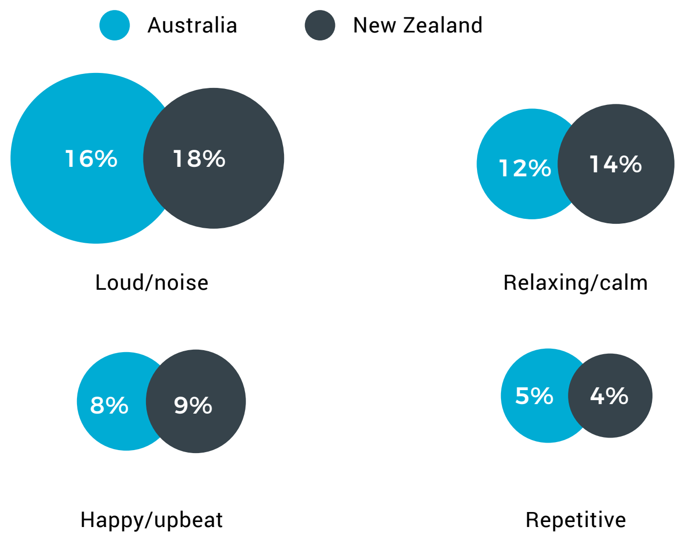
We analysed hundreds of open-ended responses to identify the specific triggers that delight or disgust shoppers. The results were stark: Volume is the No.1 enemy in both nations.

- Australia: 16.6% of all negative feedback explicitly cited "Loud" or "Noise" as the main reason for a poor experience.
- New Zealand: Sensitivity is even higher, with 18.2% of complaints citing volume.

Praise a venue, they emphasise the emotional impact: "Relaxing/Calm" is the leading positive factor in both markets (12.5% AU, 14.0% NZ).

Qualitative feedback themes in AU and NZ

Source: Inside Retail x OneMusic survey 2025



Licensing simplified

(Australia vs New Zealand)

For many business owners, music licensing is the elephant in the room, often misunderstood, sometimes overlooked, but legally vital.

> ***Customers in both markets see music licensing compliance as a sign of trust. This research shifts the narrative...***

Across the Tasman, most consumers are unaware that copyright legislation requires businesses to get permission to play copyright-protected music.

- In Australia, 56% of consumers are unaware that a music licence is required.
- In New Zealand, awareness is equally low about the need for businesses to have a music licence or other permission

This lack of public pressure means businesses are often willing to risk copyright infringement; however, ignorance is not a defence; it is a vulnerability. And as awareness increases, so does the expectation of ethical conduct.

While customers might not know all the laws, they respect the law of the land. When asked how they would feel about seeing a "Licensed to Play" sticker in a window, responses are overwhelmingly positive in both countries.

- Australia: 27% see it positively, considering it a sign that the business is "doing the right thing".
- New Zealand: Positive sentiment rises to 30%.

These strong favourable feelings towards a business having permission for music use show that demonstrating your compliance benefits your brand. This signals subtly to customers – across Australia and New Zealand, that you are a legitimate, ethical operator who pays your suppliers, whether they are coffee roasters or songwriters.

What occurs if a venue refuses to license? A notable minority will judge you for it.

- 11% of Australians and 12% of New Zealanders say they would view a non-compliant venue negatively and might avoid it.
- Older demographics (55-74) in both markets are the most likely to judge non-compliance harshly.

Compliance is simply the expected standard of a professional business.

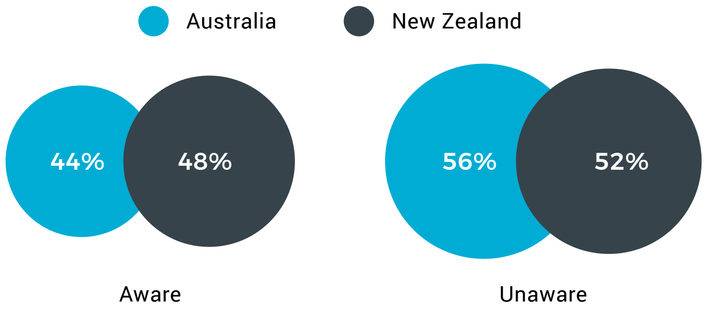
Actions to take

1. Get compliant with a music licence or direct permission: It shields you from copyright infringement.
2. Don't hide your licence in a drawer: It is a low effort trust signal that resonates with ~30% of your customers and alienates almost no one.
3. Train your team: Ensure staff understand why you pay for permission to use music so they can confidently explain it ("We support the artists we play"), turning a legal obligation into a story that strengthens your brand.

Licensing awareness varies between AU and NZ

Over half of consumers are unaware of licensing requirements

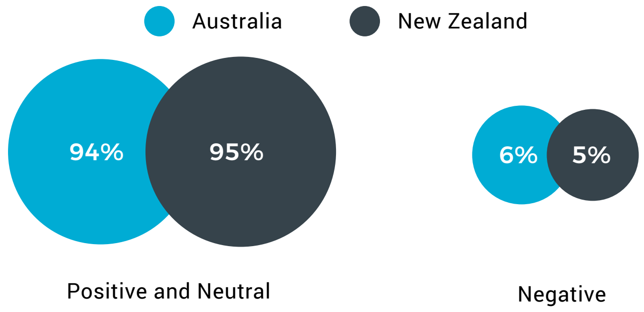
Source: Inside Retail x OneMusic survey 2025



Sentiment toward licensing sticker (AU vs NZ)

Healthy number views licensing positively

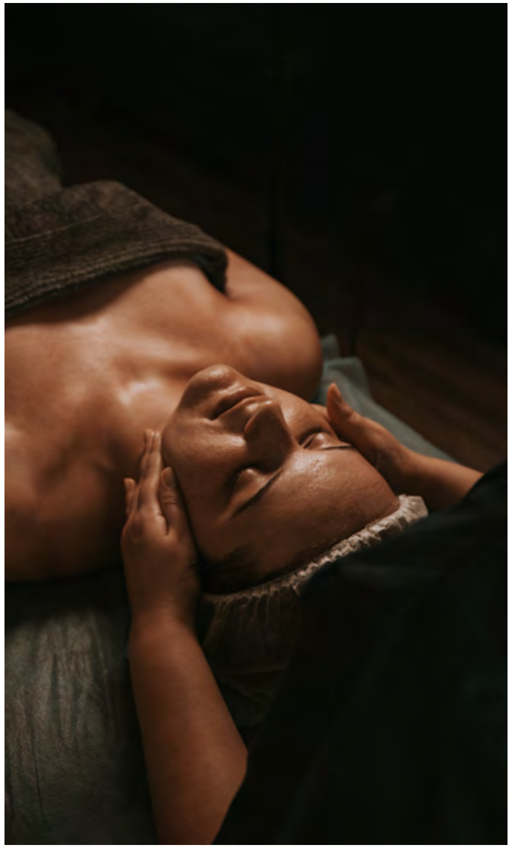
Source: Inside Retail x OneMusic survey 2025



Recommendations

Our research with 1,250 consumers across Australian and New Zealand leaves no question: Music is not just an extra; it is a vital commercial tool with measurable impact on dwell time, spend, and customer loyalty. The data confirms that 40% of Australians and 35% of New Zealanders have left a venue due to poor sound, while roughly half in both markets have stayed longer because the music felt right. The way to unlock this "dwell time dividend" is not through guesswork or personal preference, but through strategic alignment, consistent execution, and professional compliance.

The five recommendations that follow are evidence-based, tested across both markets, and ready to be implemented. Each one targets a specific lever: volume control, genre alignment, quality curation, temporal strategy, and brand trust. Collectively, they form a practical playbook to transform your playlist from background noise into a managed, measurable asset that builds the brand, delights the customer, and boosts the bottom line.



1. **Master the volume: Your first and last impression**
Volume is not just a setting; it's the most crucial element in your sound strategy. It's the first thing customers notice and the leading cause of complaints in both Australia and New Zealand, with Kiwis being even more sensitive to noise.

2. **Match genre to category: Stop guessing, start aligning**
Your playlist directly reflects your brand identity. Mismatched music makes your brand feel "disconnected" and "unprofessional" to over 40% of customers. The data provides a clear blueprint for genre expectations across sectors.

3. **Kill the '"Elevator Music'": Invest in authenticity**
Using generic, royalty-free stock music or AI music is a false economy, especially if you target customers under 45. Up to 75% of Gen Z shoppers in Australia and New Zealand can instantly spot "fake" music, and they associate it with a "cheap" or "inauthentic" brand.

4. **Wear your licence with pride: Turn compliance into a trust signal**
While more than half the population remains unaware of music licensing laws, displaying a "Licensed to Play" sticker is viewed positively/neutrally by 94%-95% of AU and NZ consumers.

REPORT BY