startle®

THAT'S A WRAP 2022



A DEEP DIVE INTO MUSIC AND ITS MOST MEMORABLE MOMENTS IN 2022.

TRACKLISTING.

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BTS photo by LG Electronics
Taylor Swift photo by Toglenn
Blackpink photo by Marie Claire Korea
Harry Styles photo by Lily Redman
Bad Bunny photo by Kevin9625Ja

OUR TAKE ON '22.

MUSIC FOR TRENDING, FOR TWERKING, FOR TIKTOKS AND CHART-TOPS.
FOR TOE-TAPS AND HEAD-BOBS AND EVERYDAY LISTENING.

Oh, what a year it's been for music. We had Silk Sonic's mind blowing performance at the 64th Grammy Awards, hit film *Elvis* taking Hollywood by storm, and let's not forget that Superbowl halftime show, bringing us a collaboration of some of hip-hop's greatest artists of all time. And while the end of the year at Startle usually revolves around a fancy Christmas getaway and a variety of questionable Secret Santa gifts, we've been bursting to share our brand-spanking-new, end of year music report, *That's A Wrap*.

Taking a look back at 2022, we revisit the songs and albums that topped the charts, keeping us entertained drive after drive, commute after commute, gym sesh after gym sesh. Crucially, we dive headfirst into what made these songs connect with people so well, using our team's musical expertise and behavioural science know-how to understand what made them tick.

After all, music curation is both an art and a science, and there are reasons why certain songs rack up millions of plays, whether cultural, musical, marketing-led or simply as a result of a cringey TikTok dance trend.

So sit back, relax, and enjoy us leading you through the standout moments in music from the last 12 months.

Thoughts on 2022 from our Creative Director, James Picken:

"Curating playlists for retail and hospitality brands around the world, we've worked with everyone from high-end hotels and restaurants to large hardware retailers and edgy coffee spots, and we've seen brands' approaches to music evolve significantly. The desire to be unique and impactful is at the forefront of many of our music profiling meetings. Clients are so much more open when it comes to taking risks musically, as they fully understand the wider-impact of music in a space on brand perception, brand recall and overall atmosphere. In 2022, the trend was to steer away from overtly-commercial tracks or "safe" music choices, and instead promote a range of artists, styles and genres. Standing out was definitely more important than fitting in."



GLOBAL TOP 10 SINGLES.

1.  **As It Was**
   HARRY STYLES
2.  **Heat Waves**
   GLASS ANIMALS
3.  **STAY**
   THE KID LAROI & JUSTIN BIEBER
4.  **Me Porto Bonito**
   BAD BUNNY, CHENCHO CORLEONE
5.  **Tití Me Preguntó**
   BAD BUNNY
6.  **Cold Heart - PNAU Remix**
   ELTON JOHN, DUA LIPA & PNAU
7.  **Enemy**
   IMAGINE DRAGONS, JID, ARCANE & LEAGUE OF LEGENDS
8.  **Quevedo: Bzrp Music Sessions, Vol. 52**
   BIZARRAP AND QUEVEDO
9.  **Ojitos Lindos**
   BAD BUNNY & BOMBA ESTÉREO
10.  **Running Up That Hill (A Deal With God)**
    KATE BUSH

Data sourced from Spotify Wrapped 2022.

GLOBAL TOP 10 ARTISTS.

1.  **Bad Bunny**
2.  **Taylor Swift**
3.  **Drake**
4.  **The Wkend**
5.  **BTS**
6.  **Ed Sheeran**
7.  **Harry Styles**
8.  **Justin Bieber**
9.  **Kanye West**
10.  **Eminem**

Data sourced from Spotify Wrapped 2022.

DEEP DIVE.

NOW WE KNOW THE BIGGEST SONGS AND ARTISTS OF THE YEAR, LET'S EXPLORE HOW THEY HIT THE RIGHT NOTES AND BECAME GLOBAL SMASHES...

1



SONG

As It Was

HARRY STYLES

Released on 1st April 2022, *As It Was* by Harry Styles is the song that spent the longest at the top of the Spotify charts this year. The first song to be released from his third solo album, *Harry's House*, is a synthy, electronic, 80s-inspired tune that helped Styles continue to musically evolve. It exploded on TikTok and has currently been used as the audio for 2.6 million videos on the app (Nov 2022). The song's retrospective vibe is unsurprising, with many artists in the last few years creating songs that feel like throwbacks. The refrain "you know it's not the same as it was" even has a nostalgic angle, backed up by the 80s instrumentation and textures. Because, you know, Harry never goes out of Style.

It's an uptempo song - studies have shown that tempo and cover time have a relationship in service settings. Generally, the quicker the tempo, the less time customers spend in a venue. If you're looking to reduce crowds in busy periods, a tune like *As It Was* might be your best bet.



Harry's House, is a synthy, electronic, 80s-inspired tune that helped Styles continue to musically evolve

2



SONG

Heat Waves

GLASS ANIMALS

The song that spent the second most weeks at number 1 on the Spotify charts in 2022 is *Heat Waves* by Glass Animals. Interestingly, the song was first released on 29th June 2020, but found huge success this year. Another song that blew up on TikTok, *Heat Waves* has a very chorus-oriented structure, with catchy musical material and simple lyrical structures that make it a very effective pop anthem. Stylistically, it blends elements of indie-pop, for example the distorted, vintage microphone effects, and a trap-inspired beat, think: the 808-type bass. This blending of genres is something that we've seen become more common in the last few years, and expect to continue into 2023.

The song has a strong bass, and there is often a relationship between lower frequencies and darker lighting. Studies have shown that when lower frequencies are boosted (making the bass louder), people are more attuned to dark lighting. Therefore, designing atmospheres where multiple environmental stimuli match with each other could lead to higher levels of contextual fit, and happy customers that want to spend more time in your venue or make a purchase.

3



SONG

STAY

THE KID LAROI & JUSTIN BIEBER

Originally released in July 2021, *Stay* by The Kid Laroi ft. Justin Bieber continued to be a huge success in 2022. If you listen to it and think, "huh... have I heard this before?" - it might be because of the super effective synthesiser riff, as it's similar to the one used in the 2009 track *Fireflies* by Owl City. Another song that owes part of its success to TikTok, *Stay* has an extremely catchy pre-chorus and 'drop' into the chorus that worked well because of its clever use of musical tension and release. Texturally, it's a pretty simple song - a consistent drum pattern + a synthesiser riff + bassline + a few effects here and there (+ a Justin Bieber feature?) = a perfect pop song.

LET'S TAKE A LOOK AT THE LATEST ALBUMS FROM THE TOP 3 MOST STREAMED ARTISTS THIS YEAR...

1



ALBUM

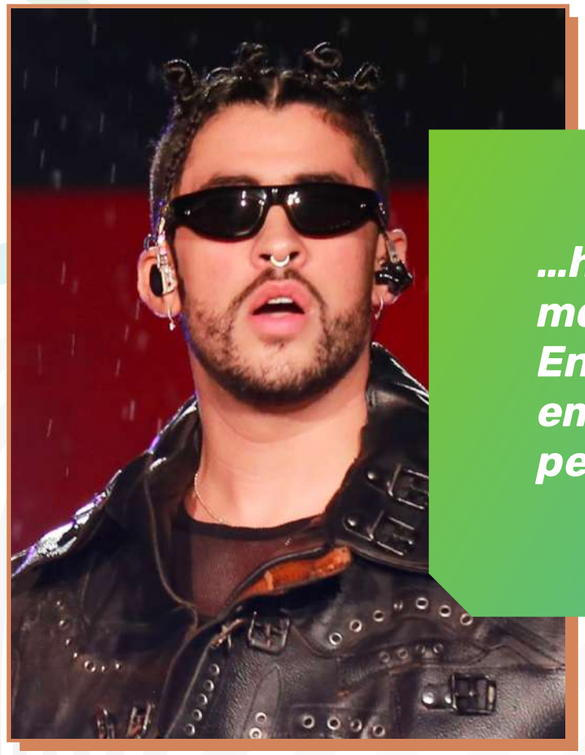
Un Verano Sin Ti

BAD BUNNY

Released in May, the bulk of Bad Bunny's newest album was produced by rising producer MAG (Max Martin Protegee). The tracks on the body of work move into a more pop, commercial sound for Bad Bunny, who is also now a rising fashion influencer (he's a busy guy). On the album you can hear mid-tempo, reggaeton influences - it has a pop, hip-hop sound in Spanish with dark, mood melodics.

The popularity of the album shows huge strides are being made culturally, with English speaking countries embracing non-English performing artists such as Bad Bunny, Rosalia and Blackpink. Speaking English used to be a prerequisite for commercial success in the UK or USA, but over the past few years, this appears to be fading rapidly. 2 of the top 5 playlists on Spotify focus on Spanish/Portuguese speaking artists; Viva Latino and Baila Reggaeton. Listeners can connect with melody, production, even the tone of a voice, without having to understand lyrically what is being presented.

Retail and hospitality customers in the UK are beginning to showcase a variety of languages in the music they choose to play, which only reinforces the marketing goal of universal appeal.



...huge strides are being made culturally, with English speaking countries embracing non-English performing artists

2



ALBUM

Midnights

TAYLOR SWIFT

Released on 21st October, *Midnights* by Taylor Swift still managed to be the 2nd biggest album of the year. Filled with vocal effects and vintage synths, paired with rustic, pared-back, indie style production with massive pop hooks ("It's me, hi, I'm the problem, it's me") provide the perfect, catchy backdrop for many TikTok videos. The album feels cohesive, consistent and not just chasing trends (because, let's be honest, Taylor Swift doesn't have to). On this album she teams up with Jack Antonoff, Grammy recipient of Best Producer, who has worked with The 1975, Lana Del Rey and Lorde. Antonoff also featured heavily on some of Taylor's other work, for example Folklore in 2020.

Swift has had an interesting career journey with some major bumps (think the Kanye West incident, Scooter Braun drama), but she continues to respond with class, dignity, and great music. Her recent endeavours to own her music, re-recording her entire back catalogue and naming them *Taylor's Version*, has been an inspiration to the music industry. Not only has it allowed her to have full financial and creative control over the music she should quite rightly own, but it has also given new life to albums like *Fearless* that came out in 2008 - a very smart move.

3



ALBUM

Her Loss

DRAKE & 21 SAVAGE

Another album released late in the year, 4th November to be exact, which still managed to make the top 3 albums of 2022, is *Her Loss*, a collaboration project between Drake and 21 Savage. Earlier this year, Drake followed a new musical direction with the dance album *Honestly, Nevermind*, but *Her Loss* returns to Drake's signature style - a mixture of introspective samples, coupled with heavier, unapologetic beat patterns reminiscent of earlier albums such as *So Far Gone* from 2009.

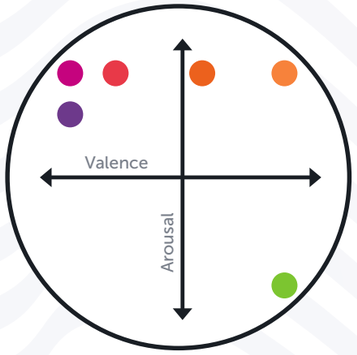
The album is eclectic in terms of energy; from uptempo, aggressive flow and beat patterns on the song *On BS*, to a more stripped-back and melodic approach on songs like *Hours In Silence*. Despite this, there are some more central themes in the lyrics, such as how the two artists have been betrayed by women in the past - this has been considered controversial in mainstream media since its release.

THE NITTY GRITTY.

WE ALL KNOW THAT MUSIC CAN CHANGE OUR MOODS. BUT ITS POWER IS MUCH LARGER THAN JUST THAT; IT CAN CHANGE THE WAY WE MOVE, HOW WE BEHAVE, OUR PERCEPTION OF TIME, OUR READING OF A BRAND OR INFLUENCE OUR PURCHASING DECISIONS.

At Startle, we use the insightful Arousal-Valence scale to determine the kind of emotions and behaviour particular songs will encourage. We do this by analysing multiple musical elements of songs and rating them as to how active (arousal) or positive (valence) they make listeners feel.

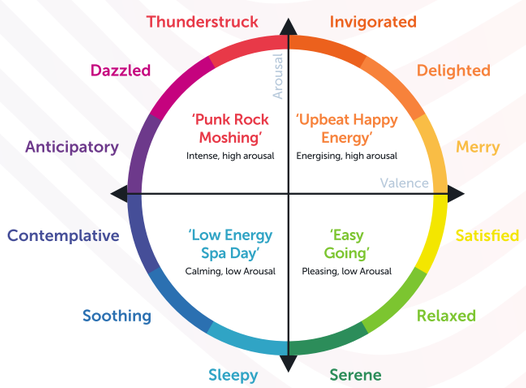
Using this model, we've plotted **2022's top 3 singles**, as well as the **biggest songs from our top 3 artists**. Here's how they measure up:



- **As It Was** *HARRY STYLES*
- **Me Porto Bonito** *BAD BUNNY*
- **Heat Waves** *GLASS ANIMALS*
- **Anti-Hero** *TAYLOR SWIFT*
- **Stay** *THE KID LAROI & JUSTIN BIEBER*
- **Rich Flex** *DRAKE & 21 SAVAGE*

To make this more tangible for the brands we work with, we then build the Arousal-Valence scale into a fully-fledged mood wheel that categorises songs according to the type mood they'll induce.

That looks a little something like this:



When working with brands on their objectives - whether that's to encourage 2nd coffee cups, drive impulse purchases or encourage faster restaurant turnaround to serve more customers - we can use the mood wheel to determine the most appropriate playlist.

There are hundreds of elements of a song that contribute to its emotional impact. One of the most simple and widely understood is the key. Put simply, major keys typically result in a more happy sounding song, whereas minor keys can induce a sense of sadness or uncertainty. Another contributing feature is the BPM (Beats Per Minute), or tempo. An upbeat song, for example, would typically be energising and motivational, whereas slower music tends to be more relaxing or thought-provoking. Of course, these elements aren't considered in isolation; many other features of a song, such as the sentiment of the lyrics and the chord progressions, contribute to its impact on our feelings and thoughts.

Here are a few of the most significant features we've analysed in our 6 tracks that contribute to the overall mood induced:



As It Was
HARRY STYLES

KEY	BPM	DANCEABILITY	DURATION
F#MINOR	174	52	2:47





Heat Waves
GLASS ANIMALS

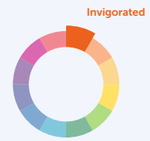
KEY	BPM	DANCEABILITY	DURATION
BMAJOR	81	76	3:59





Stay
THE KID LAROI & JUSTIN BIEBER

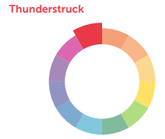
KEY	BPM	DANCEABILITY	DURATION
C#MAJOR	170	59	2:22





Me Porto Bonito
BAD BUNNY

KEY	BPM	DANCEABILITY	DURATION
C#MINOR	92	91	2:59





Anti Hero
TAYLOR SWIFT

KEY	BPM	DANCEABILITY	DURATION
EMAJOR	97	64	3:21





Rich Flex
DRAKE & 21 SAVAGE

KEY	BPM	DANCEABILITY	DURATION
BMINOR	153	56	3:59



Song data sourced from Tunebat.

I REMEMBER IT ALL TOO WELL...

EVERY YEAR HAS THOSE MOMENTS THAT MAKE YOU STOP AND THINK; WOW. AN EVENT OR TREND THAT CAUSES A SHIFT IN POP CULTURE, OR SOMETHING THAT CAPTURES WHAT'S GOING ON IN THE WORLD, OR A MAGICAL HAPPENING THAT HIGHLIGHTS HOW THE POWER OF MUSIC GOES WAY BEYOND THE SONGS THEMSELVES.

AT STARTLE, WE LIVE, BREATHE AND, IF YOU CUT US IN HALF (BUT PLEASE DON'T) BLEED MUSIC. SO FORGIVE US FOR BLOWING ONE OF OUR MANY TRUMPETS FROM OUR BRASS SECTION WHEN WE SAY WE ALWAYS KEEP UP WITH ALL THE UNMISSABLE MUSIC MOMENTS AND TRENDS, AND WHAT THEY MIGHT MEAN FOR THE INDUSTRY.

ON THAT NOTE, WE'VE PICKED 3 OF THE MOST MOMENTOUS MUSICAL MOMENTS FROM 2022. ALL HAD A HUGE IMPACT SOCIALLY AND ALL ARE THE KIND OF TRENDS WE'LL BE RECALLING WITH FRIENDS FOR YEARS TO COME.



Kate Bush photo by YouTube



Kanye West photo by David Shankbone



Kalush photo by LTV Ziņu dienests

THE SONG OF SUMMER '22 WAS A SONG FROM ...1985?

LET'S SET THE SCENE. IT'S THE START OF JUNE, YOU'RE TUNING IN TO WATCH THE TRENDING NEW SERIES STRANGER THINGS SEASON 4, PART 1 ON NETFLIX. AS YOU WATCH, 2 THOUGHTS ARE RUNNING THROUGH YOUR MIND: 1) ISN'T THIS SUPPOSED TO BE A KID'S SHOW? IT'S WAY TOO SCARY. AND 2) I SWEAR THIS SONG IS FROM THE 80'S!

If you were a contributor to the 7.2 billion minutes watched of the newest series of Stranger Things, you're probably familiar with the importance of music to the show. So when Max's song, a character who is 15 years old, was Kate Bush's 1985 hit *Running Up That Hill*, it caused quite a stir.

The song then spent 3 weeks at the top of Spotify's global charts, and became the song of the summer. It managed to gain huge mainstream radio exposure, and reach a whole new audience on social media apps like TikTok. CBS reported that according to Luminate, the song earned Kate about $2.3 million in streaming royalties between May 27th and June 23rd, when the series dropped.

This song is just one example of the power other media have on the success of a song in 2022. *Running Up That Hill* becoming the song of the summer was entirely dependent on the TV show, and we are increasingly seeing songs resurfacing or getting their 5 minutes of fame because of shows, films, and even social media videos.

With 1 billion people using the app every month, it's unsurprising that TikTok has a huge influence over pop culture. One of the best examples of the impact the social media platform can have on the music industry is with Lizzo's song *About Damn Time*.

The song was released on April 14th and was heavily promoted on TikTok. It became associated with a viral dance by TikTok personality Jaeden Gomez - choreography which Lizzo then used in multiple performances. The song has been used in over 2 million videos on the app, and reached number one in the United States, becoming the artist's second number one single there. 67% of the app's users are more likely to seek out songs on music-streaming services after hearing them on TikTok, according to a November study conducted for TikTok by the music-analytics company MRC Data.

About Damn Time is just one example of the exposure and influence other media such as TV, film and social media can have on music releases, and the industry as a whole. 2022 has seen this grow, and we expect the influence to continue in 2023. And who knows, the summer banger of 2023 might be from 1962.



"It's such a great series, so I thought that the track would get some attention. But I just never imagined that it would be anything like this. It's so exciting but it's quite shocking really — the whole world's gone mad."

*KATE BUSH, WOMAN'S HOUR**

**https://www.bbc.co.uk/sounds/play/live:bbc_radio_fourfm*

NO ONE MAN SHOULD HAVE ALL THAT POWER...

IT'S NO SECRET THAT KANYE WEST HAS ALWAYS BEEN A CONTROVERSIAL FIGURE IN POP CULTURE. FROM INTERRUPTING TAYLOR SWIFT AT THE 2009 MTV VIDEO MUSIC AWARDS, TO OUTRAGEOUS STRINGS OF TWEETS, HE'S HAD HIS FAIR SHARE OF 'CANCELLATIONS'.

October 2022 was no different. Kanye West debuted an inappropriate shirt at Paris Fashion Week, and began making aggressive, anti-semitic remarks on social media later that week.

What followed was a flurry of brands West was associated with dropping him completely. It seemed that every few hours, another company was announcing their intentions to remove affiliations with the rapper. The brands include Gap, Balenciaga, Madame Tussauds and Foot Locker, amongst others. One London tattoo removal studio was even offering to remove Kanye West tattoos for free. Most notable of the brands was Adidas, the company Kanye West collaborates with for 'Yeezy', a move that the brand claims will cost them an estimated $250 million in net income.

"Ye's recent comments and actions have been unacceptable, hateful and dangerous, and they violate the company's values of diversity and inclusion, mutual respect and fairness,"

ADIDAS

Watching the list of brands who wanted to de-Kanye grow throughout October was very memorable. At Startle, we worked with customer to remove West's music from their playlists.

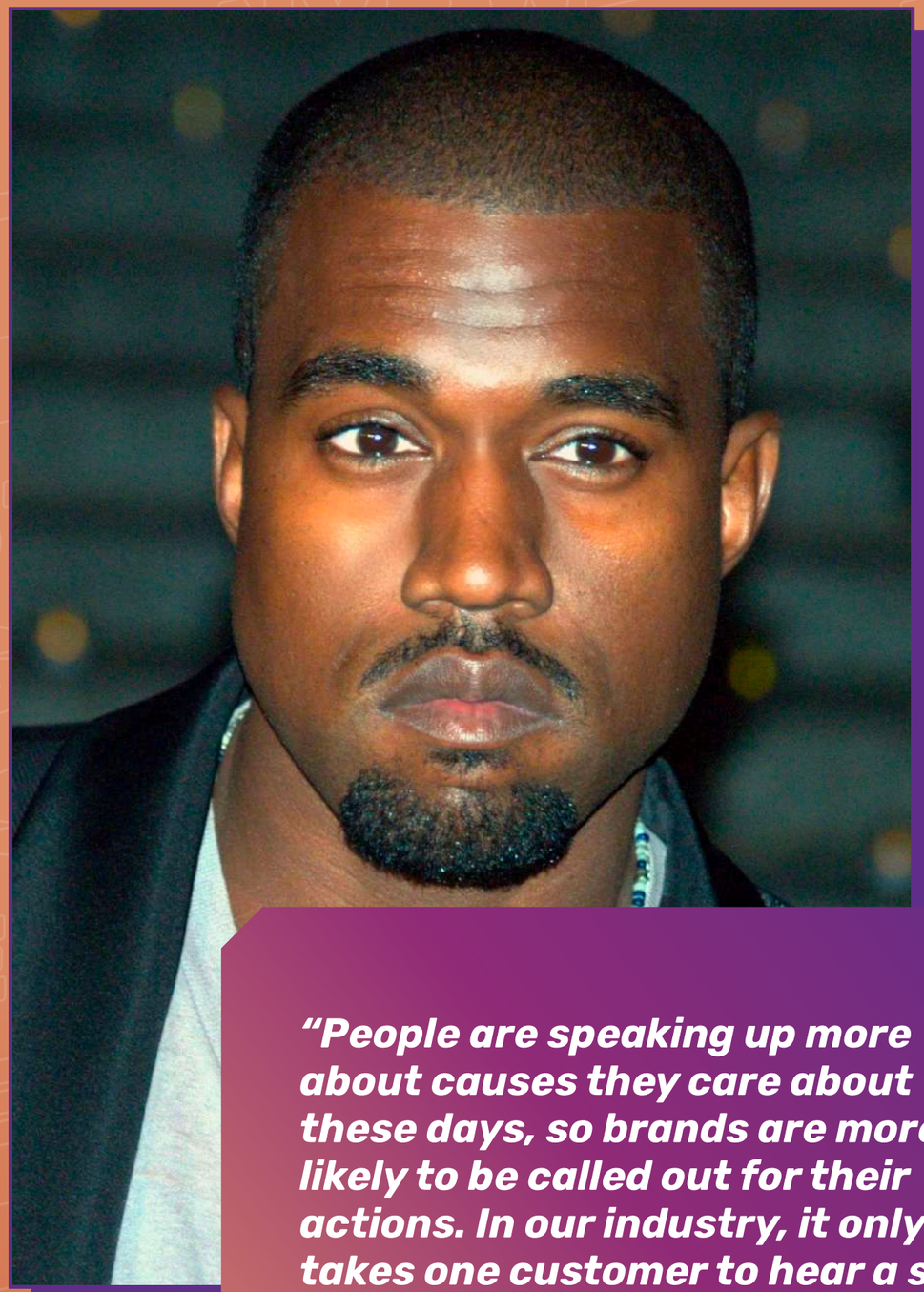
It seemed to represent the expectation that brands should align themselves with their values consistently. 2022 has put even more emphasis in standing up for what's right - in a lot of cases, businesses want to be speaking up about issues.

This event also demonstrated the power of musicians, outside of just their music. Kanye West is more than a rapper - he's a public figure in pop culture, an opinion leader, and with this, carries responsibility. With the public knowing more and more about musicians' lives and opinions, we expect the pressure on them to have a strong social position to gain even more momentum in 2023.

AUTHOR'S NOTE:

Just to add fuel to the fire, as we've been writing this, Kanye announced his 2024 presidential bid. West previously ran for president in 2020, but failed, attracting only 70,000 votes.

We're not sure what 2023 will hold for Kanye West - and we're not sure we want to know.



"People are speaking up more about causes they care about these days, so brands are more likely to be called out for their actions. In our industry, it only takes one customer to hear a song or artist they're upset by and that's a lasting association they'll have with that brand."

MELANIE FULKER, CHIEF CUSTOMER OFFICER

COME TOGETHER, RIGHT NOW - EUROVISION 2022.

WE ALL KNOW THAT MUSIC IS A WAY TO BRING PEOPLE TOGETHER. EVEN IN THE DARKEST OF TIMES, IT CAN PROVIDE A REASON FOR US TO FEEL CONNECTED AND SHOW SOLIDARITY.

The 66th Eurovision Song Contest was held in Italy on 14th May, following the Russian invasion of Ukraine earlier in the year. Even before the contest, Russia was excluded from taking part, and the preparations for the show were uncertain. But despite all odds, it took place, and Ukraine were able to perform.

161 million people tuned in to watch the show, and Brits sat in pure shock as the scores started to roll in. The UK's entry, Sam Ryder's incredible *Space Man*, achieved the seemingly-impossible, getting multiple top scores from countries around Europe. Although it felt incredible for Brits, it was almost a contest nobody wanted to win. There was only one country everybody was rooting for.

As the public votes were announced, Ukraine's entry, Kalush's *Stefania*, roared ahead. Eventually winning with an enormous 631 points, with the UK coming an incredible second place, and being named as hosts for the 2023 contest.

Eurovision 2022 was more than a music contest - it was a demonstration of the power music holds to bring us all together, and how it can have importance beyond just the songs. That night, it was a demonstration of the political environment, and the support that many wanted to show for Ukraine. Although it was a small act, it was a way for people around Europe to stand behind the country and give it something to celebrate.

"Our courage impresses the world, our music conquers Europe!"

VOLODYMYR ZELENSKY



LOOKING FORWARD TO 2023.

WE DON'T HAVE A CRYSTAL BALL. IT'S IMPOSSIBLE TO PREDICT THE FUTURE (UNLESS THERE'S SOMETHING YOU'RE NOT TELLING US...). BUT WHAT CAN WE SEE AS LIKELY UPCOMING TRENDS IN 2023?

THROWBACK VIBES

Firstly, we predict that more and more artists will create tracks with a throwback feel. In recent years, we've seen many artists move away from clean lines and synthetic production styles to sounds heavily influenced by 70s, 80s and 90s genres. For instance, in 2021, Anderson .Paak and Bruno Mars joined forces to form the duo, Silk Sonic. The soul/funk-inspired debut album, 'An Evening with Silk Sonic', achieved considerable success in the mainstream market, finishing the year 7th in Billboard's best albums of 2021 chart. We've seen this continue into 2022, and we expect more of it in 2023. Keep an eye out for a funky house revival, and songs in the charts that'll make you feel like you're back in the 80s.



Beyoncé photo by J.ébey

GENRE FUSIONS

More on this point, with artists in general being more experimental and pushing the boundaries of genres, we can expect lots of genre blending. It's 2023 (almost). Artists can pretty much do what they want, and no longer are they confined to a single musical box. This doesn't just apply to artists who are new on the scene. Take Beyoncé's latest album 'Renaissance', released earlier this year. The album played on the 'houseification of pop', bringing us a new sound we hadn't heard from B before. Surprising, refreshing, and exciting. Long may this continue in 2023.

MULTILINGUAL MUSIC

What else is trending? Multilingual music. Gone are the days where artists had to perform in English to have mainstream success. The rise of music in other languages - notably Spanish - has been growing for years, and is now commonplace in global music charts. Another positive sign for diversity in the music industry. Sangria, anyone?

BRANDS GOING BIGGER

After an incredibly tough ride for the past few years, retail and hospitality are still facing big challenges. Notably, the ongoing positioning of themselves as destinations worth visiting against the ease of ordering online. This confirms the ever-important need to create the perfect ambience and give consumers a memorable experience. With an increase in behavioural understanding and the availability of track analysis, we see more brands showing an interest in using the influence of music to more scientifically enhance the customer experience. Time to step it up!

STRICTER TICKET SELLING

In the wider music industry, we can see regulations on the reselling of live music tickets becoming tighter. With a monopoly on the market, sites like Ticketmaster are susceptible to bots and resellers who put a huge mark up on ticket prices, making it difficult for loyal fans to see their favourite artists in the flesh. There's been pressure on the government to crack down on this issue for years - let's hope 2023 is the year this happens.



SO, THAT'S A WRAP! WE HOPE YOU'VE ENJOYED HEARING OUR TAKE ON MUSIC IN 2022. NOW, LET'S ALL GO AND SMOTHER OURSELVES WITH CHRISTMAS CLASSICS WHILE WE DEMOLISH THAT ADVENT CALENDAR CHOCOLATE ALL IN ONE (IF IT'S NOT GONE ALREADY, THAT IS). HAPPY 2023!

Drawing on the past for inspiration

"In 2022, we've seen artists continue to harness soundworlds from by-gone eras. In comparison to the gritty and unapologetic sound that catapulted them to fame in the noughties, Arctic Monkeys have adopted an entirely new style that is centred around a kind of conceptualised nostalgia. With much of Drake's new album, 'Honestly, Nevermind' and Beyoncé's single, 'Break My Soul', returning to unwavering '4 to the floor' drum patterns and traditional house music textures of the nineties, we can expect to hear more artists returning to the past for creative inspiration in 2023."

MAGNUS LINN - PLAYLIST MANAGER


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