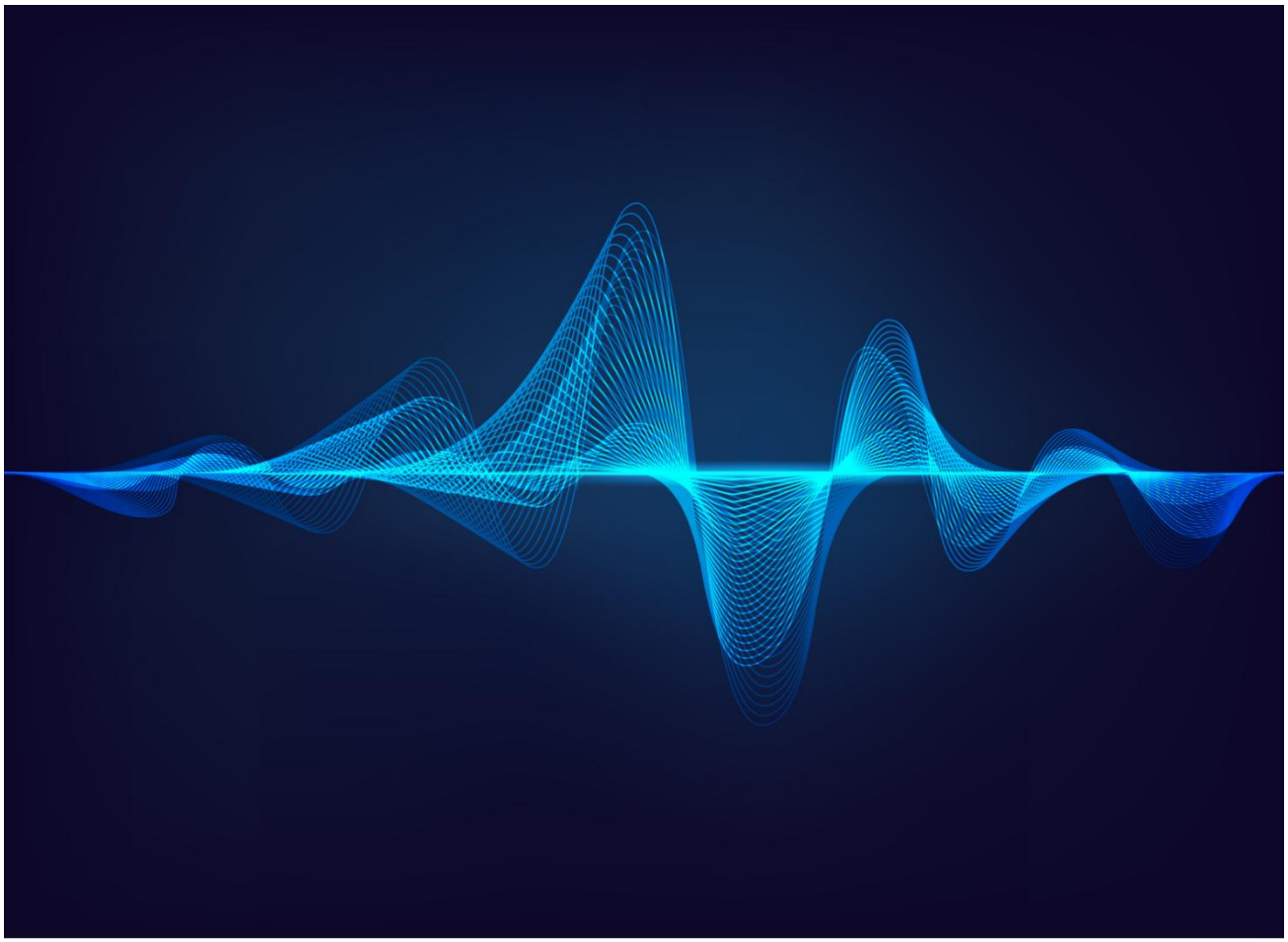

D1.2 – Report on the European Music Economy

OpenMusE

An open, scalable data to-policy pipeline for European music ecosystems

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Please see the glossaries provided in D1.1, D2.1, D6.2, and D6.3. A harmonized glossary will be hosted on the Open Music Europe project website and the Open Music Observatory (D5.1).

Executive Summary

An expected outcome of the Horizon Europe call text “HORIZON-CL2-2022-HERITAGE-01-05 - Towards a competitive, fair and sustainable European music ecosystem” is to “develop indicators to better detect the performance of the European music sector and its contribution to economic and social development, as well as to sustainability”. Accordingly, the first deliverables in OpenMusE WP1-3 featured sections on indicators: respectively, on music economics; music diversity and circulation; and music, society, and citizenship (including topics relevant to music innovation and future trends).

This report addressed two key issues identified in OpenMusE Task 1.3. First, we examined what may be underrepresented in official statistics by comparing Orbis firm-level data with Eurostat-SBS. The results show that Orbis coverage is highly country-specific, shaped by national legal and administrative frameworks. While Orbis tends to overrepresent large firms, it does capture some micro-firms that SBS excludes, notably providing revenue data. Orbis is therefore not a substitute for official statistics but, if its biases are understood, it can complement Eurostat by enabling analyses such as cross-country firm dynamics, which are often difficult to achieve with administrative data.

Second, we explored the extent to which commercial firm-level databases can support survey implementation, particularly for MSMEs. A survey on music use in the hospitality sector was distributed via email and through a panel provider. Email response rates were lower than expected, largely due to distribution challenges, though completion rates were high once participants engaged. By contrast, the panel survey provided more robust results, showing that background music is a routine and distinctive feature of hospitality venues, with most establishments playing it daily, mainly via streaming services, and 74% reporting license compliance. Music is often strategically curated to enhance customer experience and brand identity, with pop, jazz, and hip-hop among the most common genres.

Overall, the findings highlight both the opportunities and limitations of using commercial firm-level data and survey tools. They underscore the value of combining different sources and approaches to build a more comprehensive and policy-relevant understanding of the music economy.

A companion to this report is the OpenMusE Statistical Yearbook series, which transfer the methods introduced in Section 1 to multiple sites and years. The Yearbooks are generated using open-source R code, which could be modified to yield novel aggregations on both the spatial level and the level of economic sector. The Yearbooks and code are available at: https://github.com/openmusiceurope/T1.3_statistical_yearbook

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Introduction

The OpenMusE project (https://openmuse.eu/) was funded under the call HORIZON-CL2-2022-HERITAGE-01-05 – "Towards a competitive, fair and sustainable European music ecosystem"[1]. An expected outcome of this call is the development of "indicators to better detect the performance of the European music sector and its contribution to economic and social development, as well as to sustainability"[2]. Accordingly, the first three project tasks identified indicator candidates on European music economies (WP1); music diversity and circulation (WP2); and music, society, and citizenship (WP3, including also topics relevant to WP4 on music innovation and future trends). These indicator candidates are presented in D1.1, D2.1, and D3.1, respectively.

As noted in Deliverable D3.4, the project's approach to indicator development was informed by the Eurostat harmonized methodology for statistical indicators. This methodology emphasizes that indicators are designed for specific purposes, should be developed through an inclusive process, and must be situated within clear logical frameworks.

Following these principles, the OpenMusE indicator candidates were:

- defined with clear purposes (to measure music economies; music diversity and circulation; and music, society, and citizenship at European and national levels);
- developed in consultation with stakeholders, through reviews of existing frameworks and workshops with policymakers, statisticians, and industry representatives;
- embedded within logical frameworks, with each work package aligning indicators to established policy targets, codes, or macroeconomic models.

Deliverable D1.2 is developed within OpenMusE Task 1.3. Building on the findings of D1.1, which highlighted the challenges of conducting a comprehensive evaluation of the music economy, the amended Grant Agreement specifies that T1.3 designs and implements surveys to evaluate the music economy, with D1.2 reporting the results. The Task 1.3 description points to two key issues.

- The first concerns what is potentially underrepresented in official statistics, calling for the development and distribution of surveys targeting both professionals and MSMEs, while also testing different sampling and distribution methodologies.
- The second is methodological: to assess the extent to which firm-level commercial databases can support survey implementation, particularly for MSMEs.

To address these issues operationally, two survey approaches were envisioned: one based on distribution through representative organizations within the consortium, and the other relying on firm-level commercial databases. During the project, we learnt that distribution through representative organizations was not possible, not only because of data protection considerations

[1] Note the reduced call text available on CORDIS at the time of writing does not include all of its original expected outcomes (cf. https://cordis.europa.eu/programme/id/HORIZON_HORIZON-CL2-2022-HERITAGE-01-05/en).

[2] "An indicator is a summary measure related to a key issue or phenomenon and derived from a series of observable facts. Indicators can be used to reveal relative positions or show positive or negative change. Indicators are usually a direct input to Union and global policies. In strategic policy fields they are important for setting targets and monitoring their achievement" (European statistical programme 2013-17, Regulation [EU] No 99/2013 of 15 January 2013, cited in Eurostat 2014a, p. 3).

but also because these organizations have no direct access to detailed data on all relevant target groups. In short, collaboration in this area proved more complex than initially expected.

Considering these challenges, D1.2 studies the issues that are central to Task 1.3 as follows. First, we explore the potential blind spots of official statistics by comparing the coverage of the music industry in Eurostat data with that of the firm-level database ORBIS, focusing on the role of firm size as a driving factor in the coverage of both sources. Second, on the methodological side, we compare the results of two surveys designed to assess the economic impact of music use in the hospitality sector, both to examine how music contributes to business activity and to evaluate alternative distribution strategies.

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1 Measuring music economy: challenges and approaches

Even when narrowing the focus to the economic evaluation of music—leaving aside its broader cultural significance (Angelini & Castellani, 2019), which is addressed in OpenMusE Work Package 3—the academic literature identifies two main approaches. The first examines the economic value of music and live performances through willingness-to-pay (WTP) studies, questioning whether market transactions adequately reflect their full value to individuals and society. The second investigates the size and economic impact of the music economy, assessing measurable contributions to employment, income, and business revenues.[3] Within this stream, some studies also highlight spillover effects, particularly how live music events stimulate local economies. While distinct in purpose, these approaches are complementary: one emphasizes subjective valuations, the other traces observable monetary flows (Throsby, 2001). In this deliverable, we primarily adopt the second perspective.

Measuring the music economy, however, involves significant conceptual and empirical challenges. Any evaluation exercise must strike a balance among three key elements: 1) defining the scope of what is measured, 2) aligning methodological rigor with the available data, and 3) identifying the scope of potential policy recommendations.

Define the boundaries of the evaluation exercise

The concept of a "music economy" is inherently difficult to define. Unlike manufacturing or agriculture, it is not organized around a single production chain or product category. Instead, it spans diverse activities, from live performance and recorded music to publishing, licensing, and education, as well as adjacent sectors such as tourism and hospitality that are indirectly stimulated by music. This boundary problem poses an immediate challenge for measurement: should one adopt a narrow industry-based perspective or a broader, more inclusive view? Moreover, the industry itself is far from static. It comprises multiple segments and revenue streams whose relative importance is rapidly evolving (Leurdijk & Nieuwenhuis, 2012). Digitalization and globalization have further transformed the sector, shifting it from a siloed value chain structure to a networked ecosystem structure (Commission & Music Moves Europe, 2025), where traditional boundaries have blurred and "value is no longer only created in linear and centralized value chains, but in increasingly complex, decentralized and open value networks" (Commission & Music Moves Europe, 2025).

Methodological and data issues

OpenMuseE D1.1 identifies several challenges, data sources, and gaps, as well as data collection methods concerning the economy of music in Europe. In this section, we critically review some of the methodologies, highlighting their characteristics and data requirements; in the subsequent section, we consider their scope for policy implications.

[3] Broadly speaking, these two approaches can also be distinguished as micro and macro approaches. However, the macro approach does not necessarily refer to the country level; it can be applied at different levels of geographical or sectoral aggregation, including regions or specific segments of the music industry.

The operationalization of empirical evaluation of the music economy is challenging. Even when the music industry is defined narrowly and analyzed from a macro perspective, official statistics such as those from EUROSTAT may fall short. At the macro level, data collection is hindered by the fragmentation of statistical classifications. Many music-related activities are grouped under broader cultural or creative industry categories, making it challenging to isolate music-specific indicators: for instance, NACE code C18.2, Printing & reproduction of recorded media, encompasses both musical and audiovisual media, and is not further disaggregated in publicly-available EU-wide data. Heterogeneous reporting standards and inconsistent time series further complicate cross-country comparisons. At the micro level, collecting data from individual artists, venues, and firms is equally problematic. The music sector is primarily composed of freelancers, micro-enterprises, and informal activities that often go unrecorded in official statistics. Revenues can be highly volatile, contracts can be opaque, and digital income streams can be dispersed across multiple platforms (on this, see also the Measuring CCS Project Final Report, Section 5). As a result, surveys or proprietary datasets are frequently needed, but they are costly to administer and rarely harmonized across contexts.

Given this variety of possible data, different methods can be employed to estimate the size and economic impact of the music industry. For instance, several studies employ hybrid methods to measure the tangible effects of live music events on the economy (e.g., employment, income, and revenue contribution). Similar approaches have been applied to study the economy of the live music scene in Sydney (Edwards et al. 2014) and in the UK (Webster et al., 2018), generally finding that live music events boost local economies, create jobs, increase tourism, stimulate midweek economic activity, and support investment in live venues for urban growth.

Another economic evaluation model is the full market comparator model (referenced as Antal, 2020; Antal, 2023), a data-driven economic model designed and developed to estimate the total value—including both formal (licensed) and informal (unlicensed or underreported) components—of the music industry. To address the lack of systematic data on music consumption and prices, the model integrates official statistics (e.g., Eurostat, national accounts), music professional survey data, and consumption data. By comparing music consumption through different channels with the corresponding discounted licensing revenues, the model identifies a "payment gap", indicating that the current licensing fees do not correspond to the "equitable and fair" artists/performers remuneration. The valuation of music based on discounted cash flows from license fees is consistent with standard asset valuation practices and yields systematic and valuable information. Nevertheless, the extent to which such benchmarking exercises can inform normative conclusions remains limited.

Another methodology for ascertaining music value is to rely on hedonic price methods (HPM), which infer value from differences in prices of related goods—e.g., how housing prices vary with proximity to music venues or cultural areas. HPM relies on the relationship between non-market goods and their influence on the price of market goods in well-functioning markets. The hedonic pricing method (HPM), widely used in housing and labor markets (Fujiwara & Campbell, 2011), has been applied only rarely in the cultural sector. Exceptions include Garretsen and Marlet (2016), who show that proximity to live performances can raise housing prices while closeness to venues may reduce them, and Decrop and Derbaix (2014), who analyze 2,687 concerts in Belgium and find that ticket prices are shaped by artists' career stage, nationality, and popularity. Interestingly, the

full comparator model (Antal, 2020, 2023) also includes an HPM exercise to estimate price differences for a cup of coffee or a glass of beer that can be related to venue characteristics, including background music. This approach can be considered a revealed-preference method for measuring consumers' willingness to pay for music through service prices. However, HPMs are very difficult to implement. Venue characteristics are often highly correlated; therefore, HPM is complex, as the estimations are usually affected by several econometric issues, multicollinearity, omitted variables, reverse causality, and measurement errors. The implementation of some experimental variations (e.g., changing music type) can reduce, but not eliminate, endogeneity concerns, meaning estimates may remain biased and hard to generalize across settings.

A different perspective on the economic value of music is to move beyond the direct economic evaluation of the music sector and examine cases where music and live music can be considered an input for producing a service. In the hospitality sector, it enhances customer experience, shapes atmosphere, and influences behavior, potentially increasing dwell time and spending. Marketing and psychology research indicate that music design—not just its presence—matters most, with factors such as tempo, volume, and genre influencing eating pace, length of stay, consumption variety, and tipping (North et al., 2003; Sun et al., 2023; Malcman et al., 2024). A meta-analysis of 56 studies confirms that musical congruence has a substantial impact on customer perceptions (Trompeta et al., 2022). While these studies suggest that music's characteristics can be related to revenues, these results are challenging to generalize beyond a specific evaluation of the economic value of music (Malcman et al., 2024). Music usage can be estimated by examining public performance licensing—administered by CMOs and PROs—which provides a lower-bound measure of music's value in venues. Given the substantial lack of scientific literature on evaluating music usage in the hospitality sector—and the limitations of generalizing from psychological experiments—survey methods offer a valuable tool to address some of these gaps. Surveys, for example, can be used to map the extent and modalities of music usage in hospitality businesses, as well as its perceived relevance to business performance (e.g., how many establishments consider specific types of music or live performances as distinctive features of their identity or value proposition). Moreover, such surveys could help quantify the extent of unlicensed or unauthorized music use within the sector and explore the underlying reasons for non-compliance.

Following the spirit of the HPM analysis within the full-market comparator model, the study of hospitality music usage can be complemented with consumer surveys to elicit consumers' willingness to pay using stated preferences approaches. These methods gather direct consumer feedback through surveys and experiments, allowing for the valuation of hypothetical scenarios. The Contingent Valuation Method (CVM) is a widely used stated-preference approach that employs surveys to elicit willingness-to-pay (WTP) values.[4] Its strengths lie in flexibility and applicability to cultural heritage and live music, where market prices alone fail to capture total social value (Noonan, 2003; Throsby, 2003; Andersson et al., 2012; Herrero et al., 2011, 2012; Zarur Guarisa et al., 2024). However, CVM faces persistent methodological concerns such as hypothetical bias, framing and embedding effects, and discrepancies between WTP and WTA, which undermine the reliability of its estimates (Kahneman & Knetsch, 1992; Hausman, 2012; Haghani et al., 2021).

[4] For a review of the different contingent valuation methods and their ability to capture willingness to pay (WTP) or willingness to accept (WTA) for non-market goods—thus allowing the valuation of both use and non-use benefits—see Willis (2014) and McFadden & Train (2017).

CVM has historically played an important role in supporting policy debates and justifying public investment in cultural events and institutions (Hanley & Czajkowski, 2019; Perni et al., 2021; Tinch et al., 2019). However, based on the methodological concerns summarized in Haghani et al. (2021) in particular, OpenMusE took a cautious approach to incorporating CVM/stated-preference approaches in our own data collection (a brief CVM battery was included only in our face-to-face cultural access and participation survey, and not in the online survey, in which hypothetical bias could be greater. Details will be provided in the forthcoming deliverable D3.2 Report on Music, Society, and Citizenship in Europe, which reports numerous consumer-side data).

Results interpretation

Van der Hoeven et al. (2021) highlight that the implementation of live music valuation exercises depends heavily on the aims, objectives, and entities conducting the analysis. Their insights can be generalized to music valuation more broadly, where designing an assessment requires carefully balancing purpose, methodological choices, data availability, and the intended use of results. The richness of the approaches presented highlights the variety of perspectives that can be adopted, each carrying distinct policy relevance. Cernigliaro et al. (2025) provide a comparative overview and some examples to guide methodological choices, depending on the evaluation's specificities and the expected use of the results. Selecting an appropriate evaluation framework depends on the specific research question and the needs of stakeholders. For example, to inform policy decisions regarding subsidies during economic downturns—especially when tourism and cultural industries are affected—economic impact studies are more suitable. In contrast, WTP studies are valuable for designing access and inclusion policies, particularly where high WTP among non-attendees suggests positive externalities, or where price sensitivity among lower-income groups supports targeted subsidy programs. Concerning CMOs, they could rely on WTP or impact studies depending on the argument and context. CMOs could use WTP values—especially among non-users—and their heterogeneity to demonstrate the existence of positive externalities. This, in turn, can strengthen the case for favorable copyright policies, tax incentives, or support for tiered licensing models and subsidized access for smaller or underserved venues. On the contrary, CMOs could rely on impact data to show how live music-related activities benefit local economies and strengthen their position in policy dialogues. Impact studies could also help engage with the hospitality and tourism sectors and justify licensing agreements with bars, cafés, hotels, and event spaces.

Finally, each method has interpretative limitations to consider when deriving policy implications. For instance, Live Music Census exercises that also rely on stated or revealed preferences should be careful in interpreting these results and the corresponding willingness to pay. Also, the full market comparator finding should be carefully interpreted. Methodologically, the model is partly positive, as it aims to *measure* the actual value music currently generates through various uses and revenue streams, and partly normative, in the sense that from these outcomes, normative claims are made concerning what licensing fees ought to be. All in all, the valuation of the music via discounted license fees cash flows is logical in terms of asset valuation and provides important and valuable systematic information; however, the extent to which the benchmarking exercise can be used for normative implications is limited. Hedonic price estimates offer insight into the value music use creates for professional users, effectively setting an upper bound on their willingness to

pay under monopolistic conditions without input substitution. This can be seen as the 'deprival value' of music use. However, translating such estimates into normative claims about 'fair' remuneration is problematic, since similar calculations for other inputs (e.g., coffee, beer, staff, electricity) would also yield high values, together exceeding the total value generated.

D1.2 approach to music valuation

Building on the findings of OpenMusE D1.1, this deliverable addresses the two key issues outlined in Task 1.3. Regarding what is potentially underrepresented in official statistics, Section 2 examines possible blind spots by comparing the coverage of the music industry in Eurostat data with that in the firm-level database ORBIS. The logic of this section is to provide a fresh perspective on the "known known" and the "known unknown" of official statistics and firm-level data for analyzing the music economy. Conceptually, ORBIS can be seen as an intermediate resource between aggregated Eurostat statistics and often difficult-to-access firm-level administrative data. Understanding its biases is therefore essential to effectively leverage it for research and policy purposes. While administrative data may offer broader coverage and more detailed industry classifications, ORBIS enables firm-level comparison across countries. Depending on the specific research or policy question, the relative advantages and limitations of these two data sources should be carefully considered.

Regarding the second issue of the extent to which firm-level commercial databases can support survey implementation, particularly for MSMEs, in Section 3 we compare the results of two surveys designed to assess the economic impact of music use in the hospitality sector. These surveys focus on two types of music usage: as background ambiance in venues such as restaurants, cafes, and bars, and as live performances that constitute a central element of the customer experience. The results of the commercially distributed survey are complemented by a contingent valuation exercise conducted within the OpenMusE consumer survey, which captures customers' willingness to pay for music and their perceived economic value.

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2 Measuring the economics of music using EUROSTAT data

Eurostat is the official statistical office of the European Union, providing harmonized data across all member states. It collects and disseminates indicators on economic performance, demographics, social conditions, trade, the environment, and innovation, using standardized methodologies to ensure comparability across countries and over time. The richness of data collected through official statistics, regulatory acts, and surveys makes EUROSTAT a key empirical source for policymakers, academics, and analysts studying Europe.

However, Eurostat faces limitations in adequately capturing the cultural and creative industries (CCIs), including the music sector. The "Guide to Eurostat culture statistics" (Eurostat, 2018) provides a starting point for navigating European cultural statistics, providing comprehensive information on all harmonized data on culture available at the EU level: data sources, how they cover culture, the methodologies used, where to find the data, the limitations, and changes expected in the near future. While measuring culture using Eurostat data is already challenging, capturing the dynamics of the music economy is even more complex (see OpenMusE D1.1 for a detailed review). A significant difficulty lies in the fact that Eurostat relies on the NACE standard industry classification to categorize economic activities. However, even after the major NACE revision in 2006, the system does not explicitly recognize music or other cultural and creative industries (e.g., film) as distinct "industries." Instead, their activities are scattered across multiple classification domains. In addition, CCIs—and music in particular—are often underrepresented due to their heterogeneity, the prevalence of informal practices, and reliance on non-standard labor contracts. These features result in fragmented or inconsistent data, further complicating efforts to assess their economic and social contributions across Europe.

In this section, we provide estimates of the music economy identified through NACE codes using two datasets: the Eurostat Structural Business Statistics (SBS) and the firm-level commercial database ORBIS, published by Moody's. Drawing on the recently published methodology of Kalemli-Özcan et al. (2024), we compare the coverage of ORBIS with Eurostat official statistical sources. Conceptually, ORBIS can be regarded as an intermediate resource between aggregate Eurostat statistics and often difficult-to-access firm-level administrative data; therefore, understanding its biases is essential for leveraging it as a research and policy tool.[5] We complete the section presenting some estimates of music employment and a promising change in the ISIC classification codes.

2.1 NACE codes and the music industry

In Eurostat, music-related variables can be identified using three different classification systems. Besides the previously mentioned NACE codes that can capture some economic activities related to the music sector (e.g., production, publishing, live performance), there are also the ISCO codes that provide information on music-related occupations (e.g., musicians, composers, technicians), and the CPC, which refers to products by activity, such as recorded music or musical instruments. However, a key challenge in these classifications is that most of them are primarily cultural rather than music-specific, as Table 1 highlights. The first three columns in Table 1 present the list of

[5] Given the diffusion of the ORBIS Database, also OECD has investigated its representativeness in a series of papers (Bajgar, 2020; Bajgar, 2019; Berlingieri, 2017).

relevant codes from the three classification systems, along with the cultural component as retrieved from the cultural statistics framework (Eurostat, 2018), and the music components identified in OpenMusE D3.1[6].

Table 1 - Classification system for music data: Fully and partially relevant code

		Classification System used to Identify Music Data	Cultural component according to Eurostat 2018	Music component
NACE Rev. 2	C18	Printing & reproduction of recorded media	Fully	Partially
	C18.2	Printing and Reproduction of recorded media	Fully	Partially
	C32.2	Manufacture of musical instruments	Fully	Fully
	G47.6	Retail sale of cultural and recreational goods in specialised stores	Fully	Partially
	G47.63	Retail sale of music and video recordings in specialised stores	Fully	Partially
	J59	Motion picture, video & television programme production, sound recording & music publishing activities	Fully	Partially
	J59.2	Sound recording and music publishing activities	Fully	Fully
	J60	Programming & broadcasting activities	Fully	Partially
	J60.1	Radio broadcasting	Fully	Partially
	J60.2	Television programming and broadcasting activities	Fully	Partially
	M73.1	Advertising	Partially	Partially
	R90	Creative, arts & entertainment activities	Fully	Partially
	R90.01	Performing arts	Fully	Partially
	R90.02	Support activities to performing arts	Fully	Partially
	R90.03	Artistic creation	Fully	Partially
	R90.04	Operation of arts facilities	Fully	Partially
ISCO	2310	University and higher education teacher	Partially	Partially
	2320	Vocational education teachers	Partially	Partially
	2330	Secondary education teachers	Partially	Partially
	2354	Other music teachers	Fully	Fully
	2652	Musicians, singers and composers	Fully	Fully
	2621	Archivists and curators	Fully	Partially
	2622	Librarians and related information professionals	Fully	Partially
	2654	Film, stage and related directors and producers	Fully	Partially
	2659	Creative and performing artists not elsewhere classified	Fully	Partially
	3435	Other artistic and cultural associate professionals	Fully	Partially
	3521	Broadcasting and audio-visual technicians	Fully	Partially
	7312	Musical instrument makers and tuners	Fully	Fully
CPC Rev 2.1	476	Audio, video and other disks, tapes and other physical media, recorded	Fully*	Partially*
	84420	News agency services to audiovisual media	Fully*	Fully*
	9611	Sound recording services	Fully*	Fully*
	9612	Motion picture, videotape, television and radio programme production services	Fully*	Partially*
	9613	Audiovisual post-production services	Fully*	Partially*
	9631	Services of performing artists	Fully*	Partially*
	9632	Services of authors, composers, sculptors and other artists, except performing artists	Fully*	Partially*
	9633	Original works of authors, composers and other artists except performing artists, painters and sculptors	Fully*	Partially*
	383	Musical instruments	Partially*	Fully*
	84321	Musical audio downloads	Fully*	Fully*
	88904	Musical instrument manufacturing services	Partially*	Fully*

Legend: * Classification proposed for this deliverable by the authors.
Source: Authors elaboration

[6] See Annex 5 in OpenMusE D3.1 „Music, Society, and Citizenship: Methods and Indicators“

As already mentioned, the NACE codes do not explicitly recognize music or other cultural and creative industries (e.g., film) as distinct "industries." Instead, their activities are dispersed across multiple classification domains. Available codes range from adjacent sectors such as instrument manufacturing (C32.2), to very broad categories such as performing arts (R90). ISCO codes are more granular and allow for the identification of music-related occupations, including musicians, singers, and composers (ISCO 2652), music teachers (ISCO 2354), and instrument makers and tuners (ISCO 7312); while CPC refers to products by activity, such as recorded music, musical instruments, and related services.

The fact that classification systems enable the identification of music-related businesses, occupations, and products does not necessarily imply that such data are collected or made available. The *Measuring the Cultural and Creative Sector* report highlights evidence from a recent survey of Eurostat's working group on cultural statistics, showing considerable heterogeneity in the level of NACE codes used across EU member countries. In some cases, data are reported only at the three-digit level—or even less—making it challenging to identify cultural activities, let alone more granular sectors such as music. Furthermore, even if the data is collected, it might not be released, even in the form of microdata. For example, the EU Labour Force Survey (EU-LFS) collects information on respondents' current occupation using the ISCO classification at the 4-digit level, which, in principle, provides the necessary granularity (see Table 1). However, most Eurostat microdata are partially anonymized: in addition to removing direct identifiers, certain variables are grouped, aggregated, or otherwise masked, which further limits their research usability. In the case of the EU-LFS, microdata on current occupation are released only at the 3-digit level, making it impossible to identify music-related occupations precisely. Similarly, information on the respondent's local unit of economic activity is available only at the 1-digit NACE level, preventing the identification of even broadly defined cultural activities. Other potentially relevant Eurostat microdata sources (e.g., EU-SILC, CIS) are also not released with the level of detail required to capture music-related variables at the local unit level, which are at the 1-digit level, again making it impossible to identify even culturally related activities.[7]

To overcome this issue, scholars and practitioners have sought ways to estimate the size of the music industry using existing statistical data. For instance, Henriksson and Janowska (2023), in their report for the CICERONE project, estimate the size of the European music industry using two sets of NACE codes, thereby providing a minimum and expanded range for the estimation. The minimum range includes only those codes that are unquestionably related to music activities, such as performing arts (90.01), artistic creation (90.03), sound recording and music publishing (59.20), and reproduction of recorded media (18.20). The expanded (maximum) range includes broader NACE codes that encompass activities partly related to music but not exclusive to it, such as radio broadcasting (60.10), television programming (60.20), advertising (73.1), and the publishing of

[7] Detailed information about the content of the EU-LFS microdata for scientific purposes are available here: https://ec.europa.eu/eurostat/documents/203647/20621087/EU+Labour+Force+Survey+Database+User+Guide+2024+release.pdf/fc4c83e5-0988-b1bd-ae1a-8e19b3f3e87a?t=1733991490699 (Accessed on the 16th September 2025).

journals and periodicals (58.14).[8] These two aggregations provide a range for employment and the number of businesses, where the "true" value should lie somewhere between the two estimates.

In this report, we follow the CICERONE project logic of providing a range of estimations but using a more narrowly defined range. The core music sector comprises only music-specific activities and occupations. In contrast, the extended music sector encompasses partially music-related codes to reflect the broader ecosystem in which music is embedded (e.g., broadcasting, retail, advertising, education, and archiving). From this perspective, the difference between the core and extended estimates provides a measurable range, highlighting the gradation of music intensity across activities. This approach has the advantage of more closely aligning with music-specific relevance, thereby improving conceptual clarity.

Table 2 presents a comparison between the figures from the CICERONE project (2017 data), an update of the CICERONE calculations using 2023 data, and the more narrowly defined music industry components discussed earlier. Note that all the Eurostat figures reported in the following tables can be replicated and updated using a linked R code developed together with UTU and reported in Annex B. This novel and reproducible data collection and reporting method will be harmonized with the indicator framework proposed in D3.4 and extended in "OpenMusE Statistical Yearbooks" covering the years 2022 / 2023 / 2024, published via the project's platform (please see https://github.com/openmusiceurope/T1.3_statistical_yearbook).

Table 2 - Comparison between the CICERONE Project approach and the OpenMusE approach

	CICERONE PROJECT ESTIMATES		OPENMUSE ESTIMATES
	2017	2023	2023
Total number of music sector enterprises (minimum)	580,262	868,222	6,777
Total number of music sector enterprises (maximum)	1,367,621	935,465	883,455
Total number of music sector employees (minimum)	989,905	1,631,672	19,701
Total number of music sector employees (maximum)	3,886,671	2,048,840	1,809,683
Total net music sector turnover (minimum)		174,878.5	1,794.99
Total net music sector turnover (maximum)		271,903.4	229,386.2
Total music sector value added-million euro (minimum)		76,484.04	907.43
Total music sector value added-million euro (maximum)		107,164.6	91,724.63
Total music sector value added per employee - thousand euro (minimum)		6,135.78	1,165.26
Total music sector value added per employee - thousand euro (maximum)		13,349.98	9,415.44
Average total number of persons employed per enterprise in the music sector (minimum)		293	60
Average total number of persons employed per enterprise in the music sector (maximum)		1260	807

Sources: The 2017 data from the CICERONE Project are from Henriksson and Janowska (2023, page 69). The 2023 update and the OPENMUSE 2023 are authors' elaboration. For details see ANNEX 6

The comparison between CICERONE (2017, 2023) and OpenMusE (2023) highlights important differences in coverage and measurement of the music economy. CICERONE reports a sharp

[8] See Annex A for the detailed list of codes in the two aggregations.

decline in the number of enterprises and employees between 2017 and 2023, which may partly reflect the impact of COVID-19 on cultural and creative sectors, as well as possible revisions in NACE coverage. While CICERONE includes a broad set of partially cultural industries, OpenMusE restricts attention to music-specific and closely related activities, producing much lower lower-bound estimates of enterprises, employees, turnover, and value added. Value added per employee and employment per enterprise are substantially higher in CICERONE, suggesting the inclusion of larger and more productive subsectors such as broadcasting or audiovisuals. OpenMusE provides more modest but arguably more targeted measures of the music economy. Overall, the comparison highlights the trade-off between broader sectoral coverage and music-specific precision, while also indicating the disruptive effects of COVID-19 on industry size and employment.

As ranges in Table 1 remain substantial, particularly when comparing the minimum and maximum estimates across different approaches and definitions, the "true" macroeconomic economic value of the music sector cannot be precisely identified. These estimates should be interpreted as plausible intervals rather than definitive figures, reflecting both the methodological choices behind NACE coverage and the inherent uncertainty of capturing cultural activities in official statistics, as well as data availability.

2.2 Comparing Eurostat and ORBIS data across music NACE codes

NACE codes are not only used in Eurostat data but are also available, alongside other standard industry classifications, in firm-level commercial databases. One of the most widely used sources in economics, management research, and financial analysis is the ORBIS database, published by Moody's. ORBIS provides firm-level demographic information (e.g. location, website, contact details) as well as harmonized financial and ownership data across countries. As of January 2022, it covered more than 400 million firms in over 100 countries (Kalemli-Özcan et al., 2024) and presents the data in a standardized "global" format to facilitate international company comparisons. Unlike other popular databases such as Refinitiv Eikon, ORBIS includes both privately held and publicly listed firms, thus offering a more comprehensive view of economies, although it is not a census. Financial and balance sheet information are primarily sourced from national business registers, which are governed by country-specific legal and administrative filing requirements. While most countries require limited liability companies to register upon incorporation, reporting thresholds for balance sheet disclosure vary considerably by firm size and by jurisdiction.

We compare firm-level statistics from Orbis with Eurostat SBS data. The aim is to assess the extent to which the music economy (in terms of employment, output, and related indicators) is captured by Orbis and to highlight the resulting biases. This issue is highly relevant for advancing empirical research based on firm-level data in the music economy and for developing evidence-based policy recommendations.

Firm-level data are increasingly used in economic research. Unlike aggregate or sectoral statistics, such microdata allow researchers to examine how economic shocks and policies affect firms

differently depending on size, age, ownership, or export status. Their richness makes it possible to control for firm-specific factors, identify causal mechanisms, and link micro-level dynamics to aggregate outcomes, including productivity growth, business cycles, inequality, and resource misallocation (Decker et al., 2014; Gabaix, 2011; Foster et al., 2008; Card et al., 2013; Song et al., 2015).

The *"Measuring the Cultural and Creative Sector"* Final Report highlights the importance of firm-level data and underscores the value of administrative sources in advancing economic research on the CCS. However, administrative data may still suffer from the granularity limitations of industry classifications. While good coverage can partly offset this issue, such data severely constrain cross-country comparisons. As several OECD studies observe (Bajgar, 2019; Bajgar, 2020; Berlingieri, 2017), relying on a single country's statistics makes it difficult to assess how policy and economic differences shape cross-country variation or to conduct reliable comparisons of firm-level trends. Even within a single country, access to firm-level data is rarely straightforward: legal frameworks and confidentiality rules may require special clearance, access fees, or collaboration with agency staff, and in some cases, access is not possible at all. Where access is granted, researchers are often restricted to on-site workstations within statistical offices.

These barriers, combined with differences in data structure, coverage, and quality across countries, explain why most firm-level studies remain confined to a single-country perspective. In this respect, the coverage limitations of ORBIS should be weighed against the conceptual and practical constraints of administrative data. ORBIS can be regarded as an intermediate resource between aggregate Eurostat statistics and often difficult-to-access firm-level administrative data. Kalemli- Özcan, et al. (2024) reports:

> *"There is a common misconception that firm-level financial data from national statistical offices always have better coverage than Orbis. For countries where the laws require every firm to file to the national business register, this is not the case, because BvD uses the same sources as the statistical offices. For countries where the law requires only large firms to file financial statements, it might be the case that national statistical offices run different administrative surveys with better coverage of small firms."* (Kalemli- Özcan, et al. 2024 page 375),

This highlights that the quality of ORBIS data in terms of coverage is highly country specific. In particular, the limited representation of small and individual firms—highly relevant for cultural and creative industries, including the music sector— is a key challenge for some countries, and the differential in terms of output and other variables should be measured. The quantification of these gaps can guide the calculation of weights to build representative data based on ORBIS, facilitating firm-level analysis of the music industry.

Table 3 illustrates the proportion of businesses, employment, and net turnover, as well as gross output, reported by Eurostat-SBS data, that is covered by firms operating in the music industry. Some cells will be missing due to the absence of Eurostat-SBS data. In the last column, each cell represents the total for the variable as reported in Orbis data as a share of total official manufacturing gross output reported in Eurostat-SBS data. A value above 100% indicates that Orbis exceeds SBS, while values below 100% indicate under-coverage.

Table 3 - Coverage of the music sector by NACE codes

MUSIC COMPONENT	NACE CODES		NUMBER OF BUSINESSES			
			ORBIS		SBS	COVERAGE
				% MISSING FIN DATA		
MINIMUM	C322	Manufacture of musical instruments	6406	46%	6700	96%
	J592	Sound recording and music publishing activities	52577	48%	31158	169%
MAXIMUM	C182	Printing and Reproduction of recorded media	26631	52%	6650	400%
	G476	Retail sale of cultural and recreational goods in specialised stores	17500	56%	159776	11%
	J601	Radio broadcasting	29353	61%	4762	616%
	J602	Television programming and broadcasting activities	19957	48%	4050	493%
	M731	Advertising	718603	38%	327380	220%
	R90	Creative, arts & entertainment activities	685934	66%	554649	124%
MUSIC COMPONENT	NACE		NET RETURN (EUR, bn)			
			ORBIS		SBS	COVERAGE
MINIMUM	C322	Manufacture of musical instruments	1.078		1.828	59%
	J592	Sound recording and music publishing activities	6.751		10.000	68%
MAXIMUM	C182	Printing and Reproduction of recorded media	7.955		2.430	327%
	G476	Retail sale of cultural and recreational goods in specialised stores	2.432		110.000	2%
	J601	Radio broadcasting	169.544		4.000	4239%
	J602	Television programming and broadcasting activities	218.071		54.200	402%
	M731	Advertising	254.895		144.357	177%
	R90	Creative, arts & entertainment activities	30.403		50.000	61%
MUSIC COMPONENT	NACE		EMPLOYEES			
			ORBIS		SBS	COVERAGE
MINIMUM	C322	Manufacture of musical instruments	11781		20961	56%
	J592	Sound recording and music publishing activities	31413		41151	76%
MAXIMUM	C182	Printing and Reproduction of recorded media	42053			
	G476	Retail sale of cultural and recreational goods in specialised stores	27817		684926	4%
	J601	Radio broadcasting	128636		31100	414%
	J602	Television programming and broadcasting activities	544244		122000	446%
	M731	Advertising	1467331.2		878513	167%
	R90	Creative, arts & entertainment activities	382612.3		613151	62%

Legend: The SBS variables retrieved from EUROSTAT are ENT_NR, NETTUR_MEUR, and EMP_NR respectively. The ORBIS variables are the number of firms, the number of employees and the operating revenues.
Note: Eurostat SBS reports NETTUR_MEUR (net turnover), defined as sales of goods and services to third parties, excluding VAT and similar taxes. Orbis provides operating revenue (net sales) from firms' financial statements, a concept broadly comparable to turnover but subject to country-specific accounting rules. While the two measures overlap substantially, differences in coverage, reporting obligations, and treatment of small firms may explain observed discrepancies between Orbis and SBS values.

Different NACE sectors—like broadcasters vs. instrument makers—generate different biases when comparing Orbis with SBS. For instance, in C322 (instrument makers), Orbis reports a similar number of enterprises to SBS but only 56% of SBS employment and 59% of SBS turnover, suggesting under-reporting of small firms' labor input and revenues. By contrast, in J601 (broadcasters), Orbis reports six times more enterprises and more than 4,200% of SBS turnover, clearly driven by the presence of large firms with comprehensive accounts. Similarly, in J602 (TV programming and broadcasting), Orbis turnover is over four times higher than SBS, reflecting strong representation of large players.

These magnitudes indicate that the discrepancies are not marginal, ranging from Orbis covering only 2% of SBS turnover in G476 (retail of cultural goods) to exceeding SBS values by thousands of percent in broadcasting. Employment coverage varies just as widely, from 4% in G476 to over 400% in J601/J602, reinforcing that the bias is sector-specific rather than uniform.

Academic work confirms such patterns: the OECD (2020) finds that Orbis disproportionately represents large, productive firms, while Kalemli-Özcan et al. (2024) highlight country- and sector-specific variation in coverage. This implies that, within the cultural and creative industries, Orbis may overstate the scale of broadcasting and audiovisual subsectors while simultaneously underestimating smaller, more fragmented activities, such as instrument making, retail, or local performance. These differences in magnitude underscore that Orbis should be treated as complementary to, rather than a substitute for, SBS, and that careful sectoral interpretation is required when studying the music economy.

To further confirm these findings, we replicate the exercise, looking at coverage by the firm's size class. The results are presented in Table 4.

Table 4 - Coverage of the music sector by class size and NACE codes aggregation

		NUMBER OF BUSINESSES		
MUSIC COMPONENT	SIZE CLASS	ORBIS	SBS	COVERAGE
MINIMUM	0_1	323051	890664	36%
	2_9	148267	184923	80%
	10_19	11487	15530	74%
	20_49	7408	6866	108%
	50_249	3109	2642	118%
	OVER 250	717	519	138%
MAXIMUM	0_1	14064	30637	46%
	2_9	4645	4739	98%
	10_19	284	368	77%
	20_49	158	190	83%
	50_249	67	74	91%
	OVER 250	8	15	53%
		NET RETURN (EUR, bn)		
MUSIC COMPONENT	CLASS SIZE	ORBIS	SBS	COVERAGE
MINIMUM	0_1	14.1418	0	
	2_9	32.6137	0	
	10_19	18.1012	31.0786	58%
	20_49	35.3383	34.2214	103%
	50_249	64.4598	47.6326	135%
	OVER 250	403.5	106.0964	380%
MAXIMUM	0_1	0.5523	0	
	2_9	1.1168	0	
	10_19	0.4880	0.6219	78%
	20_49	1.3557	1.1765	115%
	50_249	1.5903	1.4902	107%
	OVER 250	0.8513	3.9880	21%
		EMPLOYEES (th)		
MUSIC COMPONENT	CLASS SIZE	ORBIS	SBS	COVERAGE
MINIMUM	0_1	231.06	671.28	34%
	2_9	535.89	600.95	89%
	10_19	153.24	200.81	76%
	20_49	223.88	197.83	113%
	50_249	305.56	247.93	123%
	OVER 250	1143.07	451.02	253%
MAXIMUM	0_1	9.15	19.65	47%
	2_9	15.52	13.11	118%
	10_19	3.77	4.72	80%
	20_49	4.70	5.05	93%
	50_249	6.73	6.34	106%
	OVER 250	3.33	7.48	44%

Legend: The SBS variables retrieved from EUROSTAT are ENT_NR, NETTUR_MEUR, and EMP_NR respectively. The ORBIS variables are the number of firms, the number of employees and the operating revenues.

Note: Eurostat SBS reports NETTUR_MEUR (net turnover), defined as sales of goods and services to third parties, excluding VAT and similar taxes. Orbis provides operating revenue (net sales) from firms' financial statements, a concept broadly comparable to turnover but subject to country-specific accounting rules. While the two measures overlap substantially, differences in coverage, reporting obligations, and treatment of small firms may explain observed discrepancies between Orbis and SBS values.

Table 4 shows systematic differences in coverage. For micro-enterprises (0–1 persons), Orbis severely underestimates both the number of firms and their employment relative to SBS, with coverage as low as 34–36% in the minimum case. By contrast, for larger size classes, the pattern often reverses: Orbis tends to overestimate the number of firms, turnover, and employees, especially in the over-250 category, where Orbis reports more than double the SBS employment (253%) and almost four times the SBS turnover (380%). For small and medium-sized enterprises (10–249 persons), coverage is generally closer—between 70–120%—indicating more consistent representation, though discrepancies remain in the upper bound. Overall, these results confirm earlier findings (OECD, 2020; Kalemli-Özcan et al., 2024) that Orbis provides relatively strong coverage of large enterprises but systematically undercounts micro- and small firms.

Interestingly, however, Orbis does provide operating revenue data for micro-firms (0–1 and 2–9 employees), while SBS reports zero turnover for these classes. This divergence reflects the different sources of the two datasets: SBS often excludes the financial accounts of very small enterprises due to survey thresholds and confidentiality restrictions, whereas Orbis retrieves financial statements directly from national business registers wherever filing is legally required (Kalemli-Özcan et al., 2024, p. 375). As a result, Orbis can capture revenue information for some micro-firms that remain invisible in official statistics. This feature makes Orbis a potentially valuable complement to SBS for studying cultural and creative industries, where micro-firms are numerous and economically significant, although coverage remains incomplete.

Compared with the sector-level results in Table 3, the size-class breakdown in Table 4 clarifies that many of the discrepancies between Orbis and SBS are driven by differences in how micro- and large firms are represented. Orbis systematically under-represents micro-firms, while often over-representing large enterprises, which explains why sectors dominated by big players, such as broadcasting, tend to show over-coverage, whereas those composed of small actors, like instrument makers or music teachers, show under-coverage. Taken together, the two perspectives highlight that biases in Orbis are not uniform but reflect the interaction between sectoral structures and firm size. This reinforces the need to interpret Orbis data in the cultural and creative industries with caution, paying particular attention to how differences in firm size distribution shape the observed gaps in relation to SBS.

Table 5 reports the coverage ratios of Orbis relative to Eurostat SBS by country, separately for the number of businesses, net turnover, and employment. Ratios are shown for both the minimum and maximum estimates of the music sector, reflecting the alternative NACE-based classifications presented in the last column of Table 1.

Table 5 - Coverage of the music sector by country and by NACE codes aggregation

	NUMBER OF BUSINESSES		NET RETURN		EMPLOYEES	
	MINIMUM	MAXIMUM	MINIMUM	MAXIMUM	MINIMUM	MAXIMUM
AT	110%	130%	80%	1%	63%	39%
BE	346%	364%	81%	7%	69%	23%
BG	437%	928%	149%	118%	292%	164%
CY	70%	127%	42%	219%	37%	26%
CZ	234%	53%	216%	50%	38%	18%
DE	47%	63%	122%	23%	114%	46%
DK	502%	286%	60%	3%	108%	60%
EE	268%	253%	115%	111%	60%	71%
EL	20%	38%	92%	74%	41%	9%
ES	60%	323%	133%	114%	82%	89%
FI	250%	159%	171%	121%	306%	222%
FR	288%	187%	203%	113%	115%	15%
HR	225%	169%	151%	97%	132%	54%
HU	136%	95%	150%	142%	76%	40%
IE	19%	26%	3418%	5%	88%	19%
IT	65%	143%	163%	206%	109%	97%
LT	42%	47%	112%	127%	87%	24%
LU	185%	133%	2372%	0%	1122%	3%
LV	144%	81%	118%	234%	149%	71%
MT	17%	5%	64%	100%	1%	0%
NL	134%	102%	96%	2%	172%	135%
PL	93%	78%	127%	110%	196%	175%
PT	42%	73%	185%	132%	61%	70%
RO	192%	168%	121%	132%	90%	61%
SE	182%	142%	151%	155%	89%	56%
SI	155%	106%	69%	154%	35%	45%
SK	227%	96%	217%	90%	69%	21%

Legend: The SBS variables retrieved from EUROSTAT are ENT_NR, NETTUR_MEUR, and EMP_NR respectively. The ORBIS variables are the number of firms, the number of employees and the operating revenues.

Note: Eurostat SBS reports NETTUR_MEUR (net turnover), defined as sales of goods and services to third parties, excluding VAT and similar taxes. Orbis provides operating revenue (net sales) from firms' financial statements, a concept broadly comparable to turnover but subject to country-specific accounting rules. While the two measures overlap substantially, differences in coverage, reporting obligations, and treatment of small firms may explain observed discrepancies between Orbis and SBS values.

The results show substantial variation in Orbis coverage across countries. In some cases, Orbis strongly over-represents enterprises compared to SBS, for instance in Belgium, Bulgaria, Denmark, or France, where coverage exceeds 200% or more. At the same time, Orbis often reports much lower turnover and employment, as in Austria, Germany, or Greece, suggesting it captures large numbers of registered firms but misses their economic weight. Outliers such as Ireland and Luxembourg stand out: Orbis turnover is several orders of magnitude higher than SBS (3,418% and 2,372% respectively), reflecting the presence of multinational headquarters and reporting distortions. Conversely, in countries like Malta or Greece, Orbis captures only a fraction of SBS firms and employees, underlining weaker register coverage.

Overall, these results confirm that Orbis coverage is highly country-specific (Kalemli-Özcan et al., 2024). The comparison between Orbis and Eurostat-SBS data reveals that Orbis can offer valuable insights into the music sector; however, its coverage is uneven and highly dependent on both sectoral composition and national reporting frameworks. Orbis tends to underrepresent micro- and small enterprises while overrepresenting large firms, which explains the substantial discrepancies observed across different NACE codes and firm-size classes. At the country level, coverage varies widely, reflecting differences in national business registers, filing obligations, and the presence of multinational corporations. These findings suggest that Orbis should not be viewed as a substitute for official statistics but rather as a complementary resource that, when carefully benchmarked against SBS and adjusted for sectoral and size-class biases, can support comparative and firm-level analyses of the music economy across Europe. Importantly, when these caveats are taken into account, Orbis offers a potential alternative over administrative data by enabling systematic cross-country comparisons that are otherwise difficult to achieve.

2.3 Measuring the number of musicians, singers, and composers

The absence of explicit, music-specific employment data (see Table 1 for an overview) limits the possibility of analyzing workforce trends in the music industry separately from the broader cultural sector. Nonetheless, some sporadic figures are available. For example, data on persons employed as 'Musicians, singers, and composers' (ISCO code 2652, main job) are reported for the period 2021–2023 on Eurostat website[9]. These are reported in Table 6 together with cultural employment ("Persons working as creative and performing artists, authors, journalists and linguists by individual and employment characteristics" ISCO 264-265). Germany, France, Italy, Spain, and the Netherlands consistently reported the highest numbers of creative workers. Germany, for instance, rose from 379.4 thousand in 2021 to 404.9 thousand in 2023. Poland grew significantly from 89.6 thousand in 2021 to 121.4 thousand in 2023, while Italy also increased from 131.1 thousand to 144.6 thousand. Switzerland, Sweden, and Romania remained stable, and smaller countries such as Malta and Luxembourg reported minimal numbers.

[9] Available at https://ec.europa.eu/eurostat/web/culture/database/data-domain#Employment

Table 6 - Weights of musicians in creative and cultural sectors by country

	Employment			Employment			Employment		
	Cultural	Music	Share	Cultural	Music	Share	Cultural	Music	Share
Country	2021			2022			2023		
Belgium	52.3	4.4	8.4	50.2	4.3	8.6	46.5	6	12.9
Bulgaria	26.6	5.7	21.5	23.7	5.4	22.8	24.4	6.7	27.4
Czechia	59.3	7.5	12.6	52.7	5.24	9.9	51	4.4	8.5
Denmark	32.6	5.7	17.3	32.5	5.89	18.1	38.3	6.3	16.4
Germany	379.4	57.8	15.2	393.4	75.65	19.2	404.9	72.6	17.9
Estonia	6.8		0	7	0.97	13.8	7.7		0
Ireland	18.1		0	23.4		0	23.8		0
Greece	32.2	5.4	16.9	31.8	9.06	28.5	30	8.4	28
Spain	126.9	15.7	12.3	143.3	20.09	14	137.7	20.2	14.7
France	239.7	26.6	11.1	244.7	24.21	9.9	234.2	38.4	16.4
Croatia	9.6	1.9	20.2	12.1	2.82	23.3	15	4.9	32.6
Italy	131.1	14.3	10.9	133.9	16.31	12.2	144.6	17.3	12
Cyprus	3.5		0	3.5		0	2.5		0
Latvia	5.4		0	6.7		0	8.2		0
Lithuania	11.5	1.8	15.6	11.3	2.15	19	14.1	2.7	19.1
Luxembourg	5.5		0	4.8		0	7.3		0
Hungary	37.8	5.9	15.6	37	6.59	17.8	36	6.6	18.2
Malta	1.6		0	2.1		0	2.1		0
Netherlands	135.8	13.5	9.9	146.7	16.92	11.5	135	17.5	13
Austria	37.5	7.6	20.3	47.3	10.02	21.2	47.2	11.9	25.1
Poland	89.6	14.3	15.9	95.5	14.26	14.9	121.4	20.2	16.6
Portugal	28.9	4.4	15.3	33.7	5.15	15.3	30.1	7.1	23.6
Romania	26.5		0	26.8		0	26.4	6.6	24.9
Slovenia	10.8	1.3	12.1	10	1.31	13.1	9.1	1.6	17.9
Slovakia	14.1		0	12.1		0	12.7		0
Finland	34.2	5.6	16.4	35.2	5.47	15.5	34.8	6.5	18.7
Sweden	67.2	10.1	15.1	78.5	11.19	14.3	78	11.6	14.9
Norway	30.7		0	31.8	5.95	18.7	34	6.3	18.6
Switzerland	47.1	8	17	44.4	8.19	18.4	44.8	8.4	18.7

Legend: Cultural employment is the Eurostat data cult_emp_art and music employment is identified as ISCO code 2652 and available at https://ec.europa.eu/eurostat/web/culture/database/data-domain#Employment

By comparing music-specific employment with overall cultural employment, it is possible to calculate the share of musicians in total cultural employment for 2021–2023, thereby underscoring the relative contribution of the music sector to the cultural workforce. Croatia (32.6%), Greece (28%), Bulgaria (27.4%), Austria (25.1%), and Portugal (23.6%) report the largest proportions of musicians within their creative workforce. Western Europe dominates in total workforce size, while Eastern and Southern Europe record higher proportions of musicians despite smaller creative labor markets. Poland stands out for its rapid growth in both creative workers and musicians over the past three years.

Although the shares vary considerably across countries, they remain relatively stable over time. Excluding 'shock years' such as those around COVID-19—which disrupted the economy and particularly affected music professions due to restrictions on live events—these weights can be used to extrapolate the number of musicians in other years and extend the series. Such back-of-

the-envelope calculations should be interpreted with caution, yet they still offer indicative insights and are preferable to having no estimate at all.

2.3.1 Gender, age, educational and financial attainment in the music industry

Beyond simple headcounts, key data on the music workforce should capture characteristics such as age, gender, type of employment, and education. Such information is essential for practitioners and policymakers seeking to understand the state, profile, and diversity of the industry, yet it remains largely absent from official statistics.

In the cultural and creative sectors (CCS) more broadly, women are slightly better represented than in the general economy (49.2% compared to 46.3% in 2022). Fourteen EU Member States employ more women than men in cultural work, with Latvia (63.0%), Lithuania (62.8%), and Cyprus (58.6%) at the top. By contrast, Ireland, Italy, Spain, and Malta show the lowest female participation, ranging from 39.2% to 45.7%. Cultural occupations also attract younger and highly educated workers: 60.6% of cultural workers hold tertiary degrees, compared to 37.1% in the wider economy (European Labour Authority, 2024).

The music sector, however, reveals more persistent gender disparities. Women remain underrepresented in authorship and production roles: they account for less than 20% of registered composers and songwriters in Europe (as low as 13% in the Netherlands), only 14% of songwriters on the U.S. Billboard Hot 100 in 2022, and just 23% of streamed artists on Spotify globally in 2023 (ECSA, 2024). In the audiovisual field, only 11% of composers of European TV films and series in 2022 were women, with rates as low as 0% in Italy and Hungary (European Audiovisual Observatory, 2024). Within live music venues and clubs, women represent around 43% of the workforce, including both employees and volunteers (Live DMA, 2019).

Leadership and decision-making roles show similar gaps. Within the European Composer and Songwriter Alliance (ECSA), only 31% of executive board members are women, and just 14% of member organizations are led by a female President or Chair. Representation in committees ranges from 33% to as low as 5.9%, and women make up just 23.4% of delegates at ECSA sessions. National-level evidence confirms these structural inequalities. In Germany, men are more likely to work as composers, producers, DJs, or instrumentalists, while women are more often singers, church musicians, or répétiteurs, though most also play instruments. Genre preferences also diverge: 66% of professional women are active in classical music (vs. 45% of men), while 62% of men participate in popular music (vs. 46% of women) (Deutsches Musikinformationszentrum, 2023).

Income disparities mirror these patterns. Female professional musicians in Germany earn on average €2,210 per month—24% less than men (€2,890). Women are overrepresented among the lowest earners (28% below €1,500/month vs. 15% of men) and underrepresented among top earners (2% above €6,000 vs. 5% of men) (Deutsches Musikinformationszentrum, 2023). In the UK, women remain significantly underrepresented in technical and production roles: they account for just 15% of live sound engineers, 12% of studio/mastering engineers, 29% of DJs, and 24% of producers. Age compounds inequality, as women make up 47% of musicians aged 16–55 but only 26% beyond 54, reflecting higher reported rates of age discrimination (30% vs. 21% for men) (Musicians' Union, 2023).

Some progress is visible. UK Music's 2024 Workforce Diversity Survey finds that women now represent 53.8% of the workforce, up from 52.9% in 2022. Yet representation falls at higher

seniority levels—48.3% at senior level compared to 61.5% at entry-level—and declines notably after age 45. Income inequalities remain entrenched: the average annual income for female musicians (£19,850) is nearly 10% less than that of men (£21,750), despite women being more likely to hold music degrees or postgraduate qualifications (Musicians' Union, 2023). Financial insecurity is also more frequently reported by women, with 27% stating they cannot support themselves or their families, compared to 20% of men.

Overall, while women are increasingly visible in certain areas of the music workforce, they continue to face structural barriers, including persistent pay gaps, underrepresentation in high-earning and leadership positions, limited access to technical and compositional roles, and greater career attrition linked to age and discrimination. Some of the data and percentages presented can be used together with the results in Table 6 to extrapolate the number of musicians by gender of level of education in other years or countries. Also in this case, such back-of-the-envelope calculations should be interpreted with caution, yet they still offer indicative insights and are preferable to having no estimate at all.

2.4 A promising reform of the ISIC classification to better capture music eco-system

The International Standard Industrial Classification (ISIC) revision 5, published in 2024, introduces significant enhancements to facilitate the analysis of productive cultural activities within the cultural and creative ecosystem. This change has triggered a revision of the UNESCO Framework for Cultural Statistics (UNESCO, 2025a; UNESCO, 2025b)[10] with the aim of "aligning" the value creation model of several cultural industries to official industry codes.

The UNESCO Framework for Cultural Statistics (FCS) is one of the most widely used approaches for conceptualizing cultural activities and organizes the cultural field into six domains: A. Cultural and Natural Heritage; B. Performance and Celebration; C. Visual Arts and Crafts; D. Books and Press; E. Audio-visual and Interactive Media; and F. Design and Creative Services. In addition, Intangible Cultural Heritage (ICH) is recognized as a cross-cutting domain that permeates multiple areas. Within this structure, music is located primarily under the Performance and Celebration domain, encompassing live and recorded performances, music composition, the production and distribution of recordings (in both digital and physical formats), and even the manufacture of musical instruments (UNESCO, 2009). This placement highlights the multifaceted nature of music, which spans both creative expression and industrial production.

While UNESCO (2025a) establishes a conceptual foundation for long-term socioeconomic analyses of music and other CCEs, UNESCO (2025b) presents its "operationalization" through different industry and product codes. UNESCO relies on ISIC to categories economic activities, which in its latest revision explicitly includes the creative industry group "Music, Performing and Visual Arts" (United Nations, 2024). This marks progress compared with earlier versions, which, similarly to the European NACE codes, tended to scatter music-related activities across diverse categories.

[10] Note that these two documents are 'draft for consultation'. This means they are provisional document circulated to stakeholders and experts to solicit feedback before the final version is officially adopted and published.

In parallel, the Central Product Classification (CPC) is employed to analyze music-related products and services, linking cultural activities to the outputs they generate. [11]

Table 7 compares ISIC Rev. 5 (2024) classifications with corresponding CPC Ver. 2.1 product and service codes, focusing on music, performing, and visual arts. The 2024 revision introduces clearer and more specialized categories for the music industry, covering not only traditional activities like sound recording, music publishing, and manufacture of musical instruments, but also newer dimensions such as musical audio downloads (84321) and musical instrument manufacturing services (88904). These updates make the classification system more aligned with the realities of today's music economy, where digital distribution, recording services, live performance, and creative production coexist. By capturing both industry activities (ISIC) and products/services (CPC) in greater detail, the 2024 codes provide a more accurate framework for analyzing and supporting the global music industry.

Table 7 - ISIC codes of Music, performing and visual arts group (Revision 5, 2024) and NACE codes (version 2.1) related with music and music industry. Source: United Nations, 2015, 2024

ISIC Rev.5	ISIC Rev.5 description	CPC ver 2.1	CPC ver. 2.1 description
1820	**Reproduction of recorded media**	476	Audio, video and other disks, tapes and other physical media, recorded
3220	**Manufacture of musical instruments**	84420	News agency services to audiovisual media
5920	**Sound recording and music publishing activities**	9611	Sound recording services
8552	Cultural education	9612	Motion picture, videotape, television and radio programme production services
9011	***Literary creation and musical composition activities***	9613	Audiovisual post-production services"
9012	Visual arts creation activities	9631	Services of performing artists
9013	Other arts creation activities	9632	Services of authors, composers, sculptors and other artists, except performing artists
9020	***Activities of performing arts***	9633	Original works of authors, composers and other artists except performing artists, painters and sculptors
9031	Operation of arts facilities and sites	383	Musical instruments
9039	Other support activities to arts creation and performing arts	84321	Musical audio downloads
		88904	Musical instrument manufacturing services

Together, these classifications provide a bridge between the conceptual domains of the UNESCO FCS and measurable statistical categories. They furthermore establish a conceptual "puzzle piece" suited to the broader challenge of developing sectoral indicators that bridge economic and non-economic modes of value creation (on this, see D3.4). However, while they improve the visibility of cultural and creative industries, the case of music illustrates the continuing challenges of statistical capture: activities remain dispersed across multiple codes, requiring researchers and policymakers to reconstruct the boundaries of the music economy in practice carefully.

[11] See Table 1 for the identification of music industry using NACE and CPC codes.

3 Measuring music usage in the hospitality sector

According to Confédération Internationale des Sociétés d'Auteurs et Compositeurs (CISAC), Live and public performance royalty collections have shown the strongest growth among music sector value chains, rising by 22% to an all-time high of EUR 3.28 billion (CISAC, 2025). However, the trends differ markedly across the two most significant segments—live concerts and background music. Since 2019, live music royalties have increased by 24.0%, while background music revenues grew by only 6.1%. Evidence from the United States suggests the economic significance of venues' royalty payments. According to the National Restaurant Association, member establishments pay an average of $4,500 annually for music licenses, corresponding to approximately 0.5% of total sales for small venues.[12]

Background music represents a key but often underexplored component of the hospitality business model. Unlike live concerts, which are episodic and highly visible, background music is integrated into the daily operations of restaurants, cafés, bars, and hotels. Its strategic use shapes atmosphere influences customer perceptions of service quality, and can affect behavioral outcomes such as length of stay, spending levels, and tipping practices (Trompeta et al., 2022; Malcman et al., 2024; see also the forthcoming OpenMusE deliverable D4.2 "Pilot study on in-store playlist localization", as well as the findings of sister project Music360). Despite its ubiquity, systematic data on background music use in Europe remain scarce, which complicates efforts to evaluate its economic contribution within the cultural and creative industries. Studying this area is therefore crucial not only for understanding consumer experience and firm performance in the hospitality sector, but also for informing licensing policies and ensuring fair remuneration for music creators.

The hospitality sector is a significant economic force in Europe, particularly when examined through the lens of the accommodation and food services subsector (NACE Section I). According to Eurostat, in 2022 this sector employed approximately 10.9 million people, accounting for 6.8% of employment in the EU's business economy, and comprised about 1.96 million enterprises, or 6.1% of all enterprises in that economy.[13] Its contribution in terms of value added also rose sharply: in 2022, the sector generated €280.7 billion, up from around €203.6 billion in 2021.[14] These figures reflect both economic scale and social importance, as hospitality firms are often micro- and small enterprises with high dependence on local demand and tourism.

In this section, we focus on music usage from the supply and demand perspective. Concerning the former, we use surveys to collect data on how music is used within the hospitality sector—including restaurants, hotels, cafés, and bars. We consider music usage in two forms: background music and live music events. To capture both practices and their impacts, the questionnaire

[12]Source:https://floatingworldmagazine.com/magazine/f/restaurants-and-bars-consider-turning-off-music?blogcategory=A.I.+Music (Accessed on the 19th September, 2025)

[13]Source:https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Businesses_in_the_accommodation_and_food_services_sector (Accessed on the 19th September, 2025)

[14]Source:https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Businesses_in_the_accommodation_and_food_services_sector (Accessed on the 19th September, 2025)

includes items on background music (curation, genres, provision methods such as streaming, radio, or licensed providers, and whether a public-performance license is paid) as well as on live music (frequency, formats, genres, capacity, recent trends, financing and ticketing, revenue effects on live-music nights, motivations, revenue sources, and operational challenges). We implemented the survey using two approaches: distribution via email contacts extracted from the ORBIS database, and distribution through a specialized survey firm. From the demand perspective, we relied on the OpenMusE cultural access and participation survey to examine the extent to which background music influences venue choice. We also applied the contingent valuation method to estimate consumers' willingness to pay for their preferred music. Following the brief literature review in Section 3.1, Sections 3.2 and 3.3 present the results and considerations of the two approaches used to analyze music supply in the hospitality industry, while Section 3.4 reports the findings from the consumer perspective.

3.1 Music and the hospitality sector

Live music events and festivals significantly impact the hospitality and service industries, creating a multiplier effect that stimulates local economies (Ramesh, 2024a). Broadening the perspective beyond the direct economic evaluation of the live music industry, it is interesting to examine cases where background music and live music can be considered inputs for producing a service. A typical example of this is the hospitality sector, where music is used to enhance the customer experience, influence consumer behavior, and potentially increase dwell time and spending, making it an integral component of the overall service offering. Some marketing and psychological literature has highlighted how music shapes consumers' perceptions of atmosphere, affects their emotional states, and even alters their purchasing behavior. A recent meta-analysis of 56 studies and 209 effects quantitatively synthesizes empirical evidence regarding the influence of music in tourism and hospitality service settings (Trompeta et al. 2022). The results indicate that what positively affects customers is not the mere presence of music but its design (e.g. music congruence) as music preferential dimensions have a much stronger influence on customers than the physical dimensions. For instance, variables such as musical tempo, volume, and genre have been shown to influence the pace at which customers eat, the duration of their stay, the variety of their consumption, and their likelihood to spend more or tip more generously (North et al. 2003; Sun et al., 2023; Malcman et al., 2024).

This suggests that music does not merely serve a recreational or aesthetic function but can act as a subtle yet powerful tool for service optimization and revenue enhancement. However, to what extent these findings can be translated (or used) for an economic evaluation is not straightforward. For instance, Malcman et al. (2024) conduct a field experiment in an Israeli restaurant to examine how musical characteristics influence customer spending and tipping behavior. They find a positive association between fast-tempo music, longer time spent in the restaurant, and higher tips, but no significant effect on the total bill. Interestingly, the results are not interpreted in terms of their actual monetary magnitude, nor are they integrated into a broader evaluation of the economic value of music

Given the substantial lack of scientific literature on the evaluation of music usage in the hospitality sector—and the limitations of generalizing from psychological experiments—survey methods offer a valuable tool to address some of these gaps. Academic surveys, for example, can be used to map the extent and modalities of music usage in hospitality businesses, as well as its perceived

relevance to business performance (e.g., how many establishments consider specific types of music or live performances as distinctive features of their identity or value proposition). Moreover, such surveys could help quantify the extent of unlicensed or unauthorized music use within the sector and explore the underlying reasons for non-compliance. In Section 3.2 and 3.3 we present two survey exercises designed to address the gaps highlighted above.

Our survey findings will intersect with concurrent research conducted under OpenMusE T4.3 "Pilot study on in-store playlist localization", lead by partner HEARDIS. This study investigates the impact of playlist localization – i.e., proactively integrating local music into in-store playlists – on consumer satisfaction and sense of local connection in hotels in Berlin, Hamburg, Paris, and Vienna. Data integration is challenged by the fact that the pilot study on playlist localization incorporates numerous proprietary data on both the provider side and customer side. The current survey data and the selected, non-proprietary and/or pseudonymized and aggregated T4.3 data will be integrated and concurrently analysed in forthcoming project outputs published via the Open Music Observatory (e.g., a discussion paper).

3.2 The hospitality survey distributed through e-mail

The first survey exercise was conducted through an online questionnaire, administered via the Qualtrics platform and distributed by email.

To identify potential respondents in the hospitality sector, we relied on the commercial database ORBIS. While Section 2 uses ORBIS primarily for financial data, here we take advantage of its firm-level structure and the availability of contact information, including addresses, telephone numbers, websites, and email. The sampling strategy focused on all firms located in Slovakia and Hungary that were classified under hospitality-related NACE codes in ORBIS. The hospitality industry typically encompasses catering, accommodation, entertainment, and transportation businesses (Molina-Castillo et al., 2023) and is primarily classified under Section I – Accommodation and Food Service Activities of NACE Rev. 2. This section includes:

55 — Accommodation

- **55.1** Hotels and similar accommodation
- **55.2** Holiday and other short-stay accommodation
- **55.3** Camping grounds, recreational vehicle parks, and trailer parks
- **55.9** Other accommodation (e.g., youth hostels, mountain refuges).

56 — Food and Beverage Service Activities

- **56.1** Restaurants and mobile food service activities
- **56.2** Event catering and other food service activities
- **56.3** Beverage serving activities (bars, cafés, pubs).

3.2.1 Survey structure

Prior research in hospitality has indicated that email surveys tend to yield low response rates. For example, Ali et al. (2020) demonstrate that email-based surveys in hospitality journals typically yield response rates in the lower double digits. Similarly, Holtom et al. (2022), in a large meta-analysis, report that online and email survey modes yield significantly lower participation compared to other methods. Acknowledging these limitations, the questionnaire was deliberately

kept concise to reduce respondent burden and improve completion rates. It was divided into three thematic blocks:

1. **Business Profile** – questions on business type, size (capacity, employees, turnover), establishment year, family ownership, opening days, and licensing for public music use (Artisjus Hungarian Bureau for the Protection of Authors' Rights), and SOZA (Slovak Performing and Mechanical Rights Society).
2. **Background Music Usage** – sources of music (streaming, licensed providers, radio, etc.), playback equipment, frequency of use, music genres, curation methods, and whether music is seen as a distinctive feature.
3. **Live Music Events** – equipment availability, capacity during performances, frequency and genres of live events, changes in event frequency, reasons for changes, ticketing models and pricing, revenue impacts, motivations for hosting live music, observed customer impacts, challenges, and rental of venues for private events with music.

This structure reflects the two main dimensions of music used in hospitality—background music and live events—while also gathering essential business profile information. The English version of this questionnaire is available in Annex C.

3.2.2 Sample and results

Using the above-indicated NACE codes we identified 73,576 hospitality establishments (March 12, 2025).

Table 8 - Overview of the sample and response rates by country

	Number of establishments in ORBIS	Audience size	Surveys started	Surveys finished	Response rate	Completion rate
Hungary						
	36,633	17,759	57	43	0.3%	75%
Slovakia						
	36,943	1,801	29	23	1.6%	79%

Table 8 reports the population size and the number of available emails. To increase the number of available contacts, UTU, a project partner, scraped email addresses from the web and cross-matched them with other information, such as address, phone number, and VAT number (this work was conducted under task T4.2 Survey data collection and management methods and tools)-

Invitation emails were distributed between May 9 and May 23, 2025, followed by two reminder messages sent at two-week intervals. Despite an acceptable completion rate, the overall response rate was very low. In Hungary, out of 17,759 invitations, only 57 surveys were started and 43 completed, corresponding to a response rate of approximately 0.3% and a completion rate of 75%. In Slovakia, 1,801 invitations generated 29 surveys started and 23 completed, yielding a 1.6% response rate and a 79% completion rate (Table 8).

Although we were aware of the risk of low response rates, the outcome was lower than expected. However, the high completion rate indicates that respondents who started the questionnaire did not experience survey fatigue and were willing to engage with the content through to the end. This

suggests that the low response rate is more closely linked to the distribution stage than to the survey design itself. One factor may be the quality of the email list: commercial databases can contain outdated or generic contact addresses that are not regularly monitored or connected to the relevant decision-makers. A further limitation is the possibility that many invitations were filtered into spam or junk folders, reducing their visibility.

Another challenge concerns targeting. Although companies were selected using NACE codes, the survey invitations may not always have reached the individuals best positioned to respond, such as managers or staff directly involved in music use within the establishment. As a mitigation strategy, the questionnaire was deliberately kept generic. Unlike a CIS-type survey (Community Innovation Survey), which requires detailed technical knowledge, our questions can be reasonably answered by a broad range of staff, especially since many hospitality establishments are relatively small. This approach proved effective once contact was established, as evidenced by the high completion rate. As Wu et al. (2022) point out, simply expanding the number of invitations does not necessarily improve response rates; effectiveness depends on reaching a clearly defined and relevant population.

Another critical factor is the lack of clear incentives. Many companies receive frequent requests to complete surveys, and without tangible benefits such as access to results, benchmarking information, or recognition—there is little motivation to respond. Monetary incentives (cash, gift card) and charitable donations are more effective than sweepstakes or simply offering survey results (Seshadri & Broekemier, 2022).

The relatively high completion rates (75–79%) indicate that once respondents engaged with the survey, they found it manageable and relevant. This suggests that the design and content of the questionnaire itself were not problematic. The primary challenge, therefore, lies in reaching the right people, building trust, and creating sufficient motivation to start the survey.

Overall participation was low, which limits the representativeness of the findings. The responses received should therefore be interpreted as illustrative rather than representative. Still, they provide some useful indications. In both countries, establishments pointed to common challenges such as cost pressures, competition, and staffing difficulties. Hungarian respondents expressed greater concern about market conditions and rising operational costs, while Slovak respondents were somewhat more optimistic about future opportunities, though still cautious.

As the high completion rate suggests that the main challenge lay in recruitment rather than in the design or length of the survey, we decided to complement this effort with a commercial distribution survey whose results are reported in the next section.

3.3 The hospitality survey distributed through a survey panel provider

Given the difficulties encountered in distributing the survey via e-mail, we decided to change our approach and use DYNATA[15], a company specializing in consumer and business-to-business survey research that provides first-party data for market research purposes. DYNATA was selected as a panel provider based on careful examination of their data quality control standards. This solution

[15] For more information see https://www.dynata.com

ensured the collection of the minimum required number of complete questionnaires, making the analysis and the results stronger.

In this exercise, we not only modified the distribution channels but also shifted the geographical focus. The panel provider reported a low feasibility rate for Hungary and Slovakia, meaning that only a small number of replies could be expected, so these countries were excluded from the hospitality survey. Instead, we focused on Italy, Germany, and Poland. The selection of these three countries was motivated by the significance of their hospitality sectors as well as their central role as partner countries within the OpenMusE project. Notably, the CAWI consumer survey also covers these countries, and the Live Muisc Census pilot study conducted within the project were implemented in some of them, creating potential synergies across different OpenMusE activities.

We also slightly revised the survey, removing questions related to SOZA and ARTISJUS fee specifications, which are relevant only for Slovakian and Hungarian establishments. To ensure that we targeted relevant respondents, the survey began with screening questions designed to select experienced workers in hospitality establishments that use background music. In Annex D there is the English version of the new survey.

3.3.1 Descriptives about the respondent and establishment types

We collected 601 responses in three countries: Germany, Italy, and Poland (Table 9). Germany contributed the largest share with 230 responses (38.2% of the sample), followed by Poland with 221 responses (36.8% of the sample), and Italy with 150 responses (25% of the sample).

Table 9 - Number of survey responses by country and distribution of employment status

Country		Germany		Italy		Poland	
Responses of which		230		150		221	
	% full time		93.40%		80%		81.34%
	% part-time		3.91%		2.67%		9.09%
	% self-employed		3.04%		17.33%		9.57%

Because we sought workers with detailed knowledge of workplace dynamics, we screened respondents along some dimensions related to the type of contract, organizational level, and tenure.

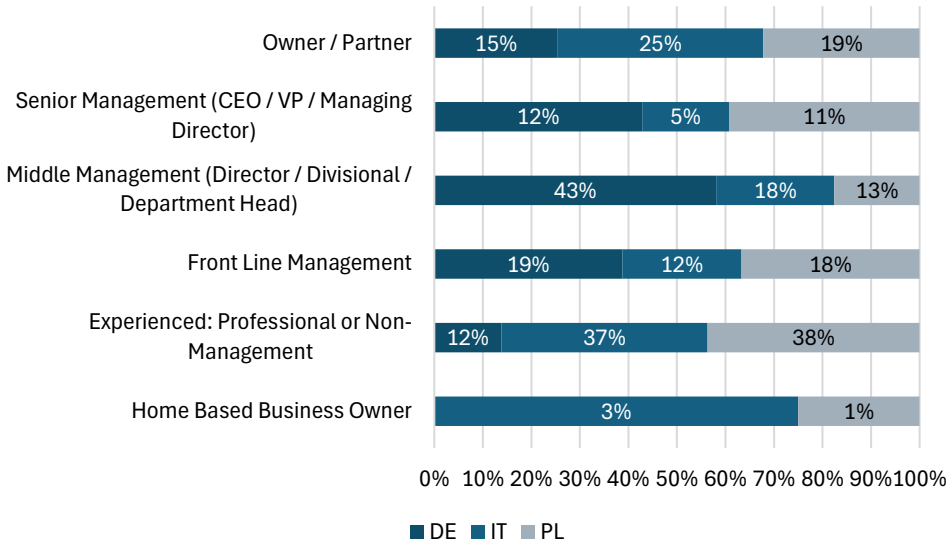
First, as we are interested in specific business-related choices, we wanted to rely on currently employed workers. Overall, 84% of respondents work full-time (30 or more hours per week), while 5% are employed part-time. Additionally, 2% work as contract, freelance, or temporary employees, and 9% are self-employed. Table 9 reports these results by country. In Germany, 93.04% of respondents work full-time, 3.91% part-time, and 3.04% are self-employed. Consistent with the general figures on Italian industrial structure[16], the share of self-employed is rather high (17.33%)

[16] For an overview on selfemployment in EU see: https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Self-employment_statistics#Data_sources

compared to the other countries. In Poland, 81.34% of respondents work full-time, 9.09% part-time, and 9.57% are self-employed.

Second, we considered the respondents' organizational level, requiring them to hold positions such as Owner or Partner, Senior Management (CEO, VP, Managing Director), Middle Management (Director, Divisional or Department Head), Front Line Management, Experienced Professional or Non-Management, or Home-Based Business Owner (see Figure 1).

Figure 1 - Distribution of current level of respondents in the organization



Overall, 28% of respondents identified as Experienced Professionals or Non-Management employees, making it the largest group. Middle Management accounted for 26%, followed by Owners/Partners at 19%, and Front-Line Management at 17%. Senior Management roles represented 10%, while only 1% of respondents were Home-Based Business Owners. The distribution of respondents across organizational roles varies by country. In Germany, the largest group is Middle Management (43%), followed by Front Line Management (19%) and Owner/Partner (15%). In Italy, Experienced Professionals or Non-Management roles dominate at 37%, while 25% are Owners/Partners and 18% are in Middle Management. In Poland, 38% of respondents are Experienced Professionals or Non-Management, 19% are Owners/Partners, and 18% work in Front Line Management. Senior Management and Home-Based Business Owners represent smaller shares across all three countries.

Finally, concerning tenure, 46% of respondents have worked for more than five years at their current workplace.

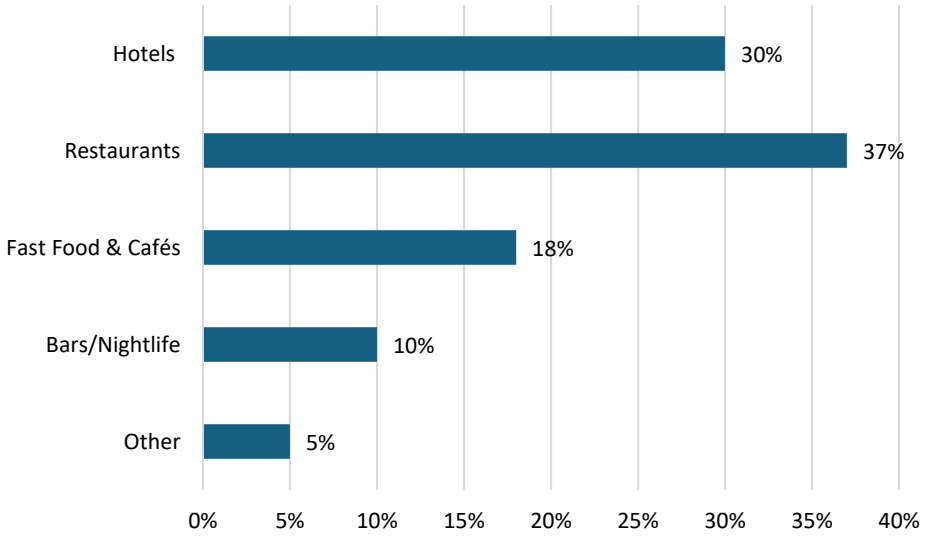
Looking at the establishment type, the hospitality sector is highly heterogeneous, and our survey identified 17 distinct categories of establishments. For analytical clarity, however, the results are presented in aggregated form (Table 10), which groups establishments into five main types—Hotels, Restaurants, Fast Food & Cafés, Bars/Nightlife, and Other. Each type encompasses a range of subcategories, such as full-service and themed restaurants, coffee shops, nightclubs, and accommodation with restaurants or bars.

Table 10 - Hospitality categories in the survey and aggregation

Hospitality Categories	Macro categories of establishments in hospitality sector
-Hotels and similar accommodation -Holiday and other short-stay accommodation -Accommodation with restaurant and/or bar	Hotels
-Full-service restaurants -Catering for corporate events, weddings, and parties -Resort and destination dining -Themed restaurants	Restaurants
-Fast food and quick-service restaurants -Street food vendors and food trucks -Coffee shops and tea houses	Fast Food & Cafés
- Bars, pubs, and cocktail lounges - Wine bars and tasting rooms - Craft breweries and microbreweries - Nightclubs and entertainment venues	Bars/Nightlife
-Spa and wellness retreat services -Camping grounds, recreational vehicle parks, and trailer parks -Other	Other

Figure 2 reports the distribution of types of establishments in for our respondents.

Figure 2 - Distribution of establishment types in the hospitality sector



Among all respondents, 37% work in restaurants, making it the most common type of establishment. Hotels account for 30%, followed by fast food and cafés at 18%. Bars and nightlife venues represent 10%, while only 5% fall into the “Other” category.

Beyond the type of establishment, additional details on ownership and size help to contextualize the survey findings. For this reason the survey also collected information on establishment ownership and size, measured in terms of employment and turnover. Overall, 36% of establishments are family-run, though this share varies across countries: in Italy it reaches 46%, while in Poland it stands at 38%.

Most establishments in Germany are larger, with 57% employing more than 20 people and 27% employing 10–20. In Italy and Poland, medium-sized establishments are more common: around 23–25% employ 5–10 people, and 17–24% employ 10–20. Very small establishments (1–4 employees) are rare across all three countries (2–8%), while self-employed individuals without employees account for 5% in Italy and 2% in Poland, but none in Germany. Overall, establishments with more than 20 employees make up the largest category across countries (38%).

In Germany, establishments tend to cluster at the top end of the turnover scale: 18% report more than €50 million annually, while another 19% fall into the €1–5 million range. By contrast, Italian businesses are concentrated in lower categories, with 23% reporting €1–5 million and smaller shares in higher brackets; 16% did not know their turnover. In Poland, the largest groups fall between PLN 500,000–5 million (€117,600–€1.18m), each accounting for about 19% of establishments. Higher brackets are less common, and 19% of respondents did not know their turnover.

In a nutshell, these results suggest German establishments in the sample tend to be larger, both in terms of employment and turnover, while in Italy and Poland, medium-sized firms are more common, and turnover is concentrated in lower brackets. The higher share of ‘don’t know’ responses in Italy and Poland may simply reflect differences in reporting practices within establishments.

Regarding location, almost half of the respondents work in establishments situated in cities with more than 500,000 inhabitants, while 25% are employed in cities with 100,001 to 500,000 inhabitants. The survey also included questions on opening days and hours. In general, respondents reported that their establishments are open throughout the week. As expected, opening and closing times vary by establishment type, but no unusual patterns were observed.

3.3.2 The usage of background music

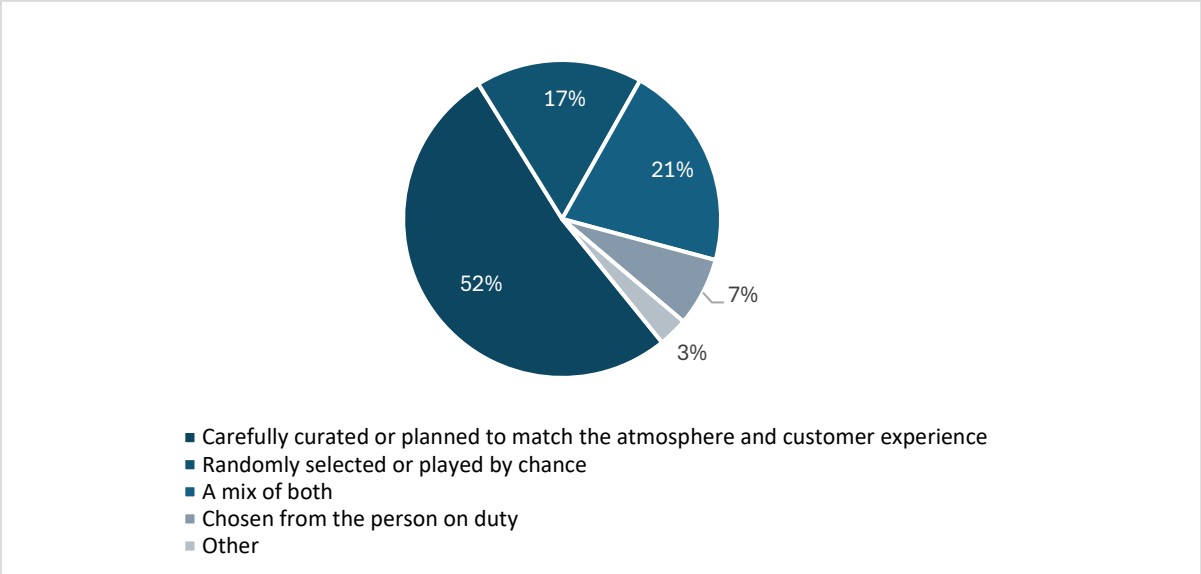
The survey aims to collect detailed information on how music is used within the hospitality sector. In this section, we examine practices related to the use of background music.

Background music emerges as a highly distinctive feature of the hospitality sector. It is played every day in 85% of establishments, and in another 16% almost every day, confirming its role as a routine and essential element of customer experience. Strikingly, 70% of establishments report that they consider music a distinctive feature of their venue, suggesting that, beyond being a simple background element, it is regarded as an input to production that contributes to brand identity and differentiation. Background music is played daily in most establishments, led by fast food and

coffee shops (86%), full-service restaurants (84%), and bars/nightclubs (83%). Hotels follow at 80%, while "other" establishments play music less frequently (67% daily, 27% most days).

If background music is a relevant aspect of a venue experience, it should carefully curated. In the questionnaire we ask about selection mechanisms and Figure 3 reports the results.

Figure 3 - Approach to background music selection in establishments



Results regarding the selection of background music further underscore its significance. In 52% of establishments, the atmosphere is carefully curated or planned to match the desired ambiance and enhance the customer experience.[17] In contrast, 17% choose music randomly, while 21% adopt a mixed approach, alternating between curated and ad-hoc selections. This suggests that while many businesses treat music strategically, a notable share still adopt a more casual or improvised approach.

Table 11 - Distribution of background music genres by establishment type

	Hotel	Restaurant	Fast Food & Cafés	Bars/Nightlife	Other	TOTAL
Pop	21%	26%	12%	7%	4%	70%
Rock	6%	7%	4%	2%	1%	20%
Hip-Hop / Rap	9%	12%	5%	3%	2%	31%
Dance / Electronic	8%	10%	5%	3%	1%	27%
Latin	4%	6%	3%	2%	1%	15%
R&B	7%	9%	4%	2%	1%	23%

[17] The survey does not distinguish between manual playlist creation on consumer platforms and professional curation systems (e.g., brand consistency, scheduling, compliance monitoring). This simplification reflects a trade-off between detail and survey length, as the aim was to capture whether music selection is actively managed within the establishment.

Classical / Opera	8%	10%	5%	3%	1%	27%
Country	4%	5%	2%	1%	1%	13%
Jazz	11%	14%	7%	4%	2%	38%
Folk	4%	5%	2%	1%	1%	13%
Experimental	2%	3%	1%	1%	0%	8%
Other	2.6%	1.1%	0.9%	0.7%	0.7%	6%
Note: Respondents could indicate from 1 to 12 genres. Percentages therefore do not sum to 100.						

Table 11 reports the genre distribution across establishment type. Because music is closely tied to atmosphere and ambience, it is not surprising that establishments display a high degree of heterogeneity in the genres they use. Pop music is by far the most common choice, played in 70% of venues, followed by jazz (38%), hip-hop/rap (31%), and dance/electronic as well as opera (27% each). Other genres also feature prominently: R&B (23%), rock (20%), Latin (15%), country and folk (13% each), experimental music (8%), and a variety of other styles (6%). Respondents could select up to four genres, underscoring the diversity and mix of musical strategies employed to create distinctive customer experiences.

Table 11 presents the percentage distribution of music genres across various types of establishments, with Pop, Jazz, and Hip-Hop/Rap being the most popular genres overall. In contrast, other genres such as Latin, Country, Folk, and Experimental have smaller shares, distributed proportionally across hotels, restaurants, fast food & cafés, bars/nightlife, and other venues. Notably, restaurants consistently host the highest share across most genres, followed by hotels. At the same time, bars/nightlife and fast food & cafés attract smaller shares, and the 'Other' establishments have the lowest percentages across all genres.

The number of different genres played in establishments, and how these vary by music selection method, provides insight into whether careful selection tends to foster genre "specialization" or "diversification."

Figure 4 - Music genre diversity across establishments by selection method

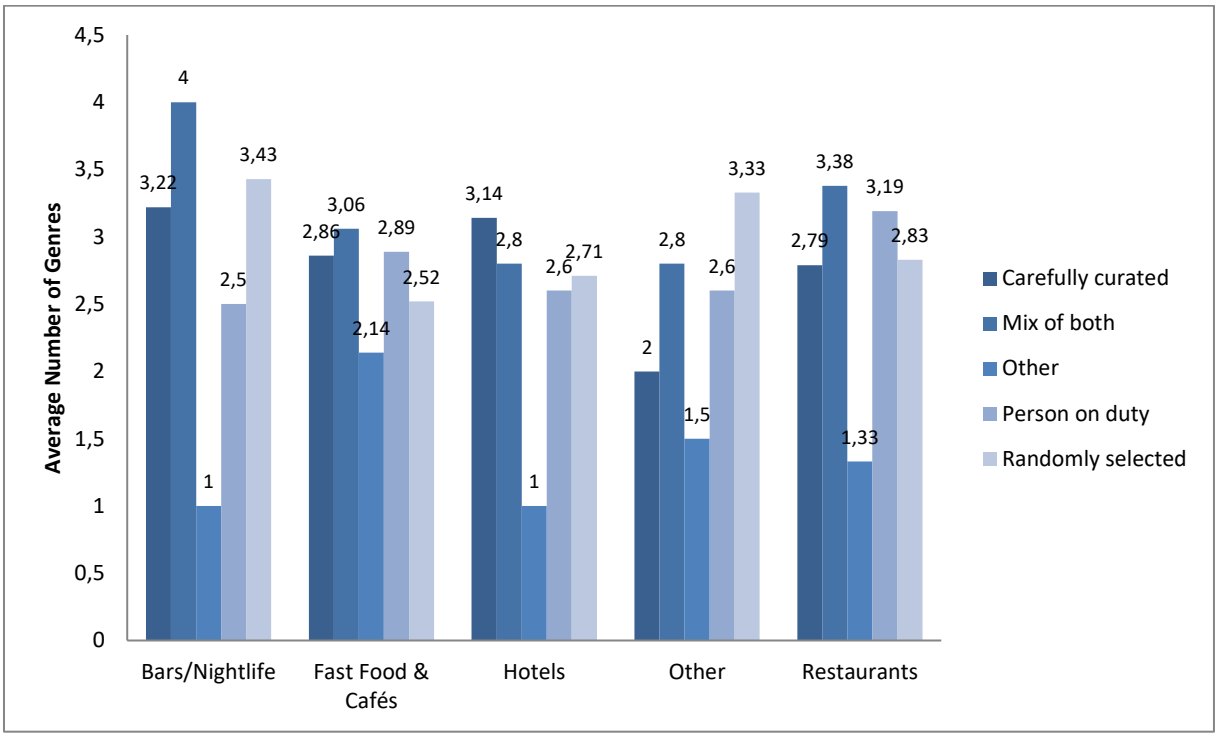


Figure 4 reports the average number of music genres played across five types of venues—hotels, restaurants, fast food & cafés, bars/nightlife, and other—based on four selection methods: carefully curated, randomly selected, a mix of both, and chosen by the person on duty. Bars/nightlife show the highest diversity when music is selected through a mix of methods (4 genres on average), followed by random selection (3.43), while "other methods" yield the lowest diversity (1 genre). Restaurants also feature relatively high diversity, particularly under a mix of both (3.38) and random selection (3.19). Fast food & cafés reach their peak under a mix of both (3.06) but drop under other methods (2.14). Hotels display more balance, with averages ranging between 1 and 3.14 genres across all methods. In the "other" venue category, random selection yields the highest average (3.33), while other methods remain the lowest (1.50). Overall, the findings suggest that the way music is selected can significantly shape genre diversity in venues: mixed and random methods foster broader repertoires. In contrast "other" methods appear to limit variety, with potential implications for audience experience and venue positioning.

Table 12 shows the music channel distribution by type of establishment.

Table 12 - Background music delivery methods by type of establishment

	Hotel	Restaurant	Fast Food & Cafés	Bars/Nightlife	Other	TOTAL
Streaming services (e.g., Spotify, Deezer, Apple Music, etc.)	23%	27%	9%	7%	2%	67%
Licensed music providers (e.g., Soundtrack Your Brand, Mood Media, etc.)	14%	16%	5%	4%	1%	40%

Purchased music (CDs, digital downloads, etc.)	14%	13%	4%	4%	0%	36%
Radio (FM, AM or internet radio) or TV	11%	14%	6%	4%	3%	38%
Other (please specify)	0%	0%	0%	0%	1%	2%
Note: Respondents could indicate up to four genres. Percentages therefore do not sum to 100.						

Most establishments (67%) rely on streaming services such as Spotify, Deezer, or Apple Music to provide music, especially in restaurants (27%) and hotels (23%), with smaller shares in fast food & cafés (9%), bars/nightlife (7%), and other establishments (2%).[18] Licensed providers like Soundtrack Your Brand or Mood Media are also common, used by 40% of establishments, with the highest use in restaurants (16%) and hotels (14%). Radio or TV reaches 38%, with the highest use in restaurants (14%) and hotels (11%). Purchased music (CDs, downloads) is used by 36%, distributed across restaurants (13%), hotels (14%), and smaller shares in other venue types. Only 2% reported using other sources. Respondents could select more than one option, reflecting the coexistence of multiple distribution channels within the same venue.

The strong reliance on streaming highlights the sector's broader shift toward digital platforms, which offer flexibility, variety, and ease of integration into daily operations. At the same time, this shift raises important licensing implications, as digital platforms differ in how they handle public performance rights compared to traditional channels like radio and TV, with consequences for both collecting societies and music creators.

Figure 5 - Payment for a music license

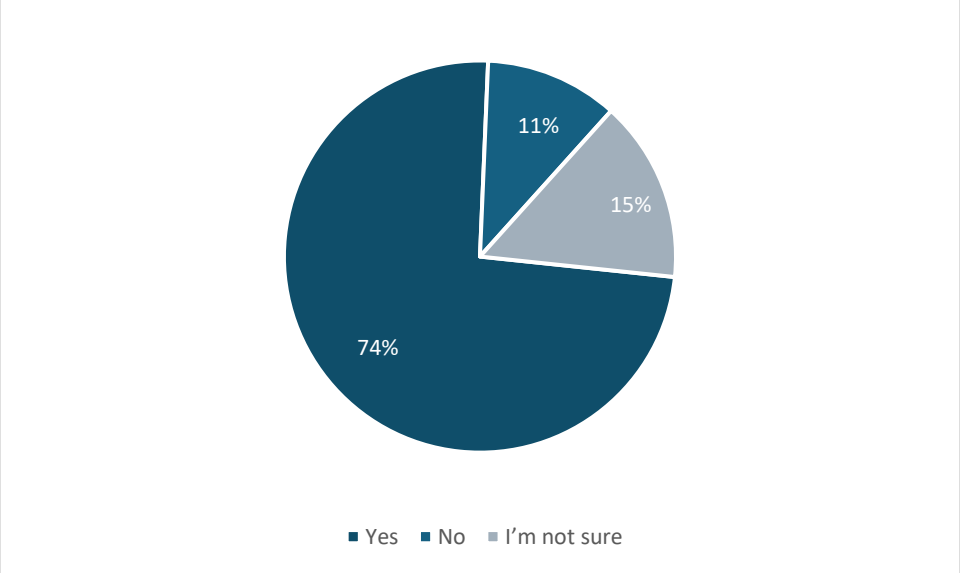


Figure 5 suggests that most establishments comply with licensing requirements, with 74% of respondents confirming that their venue holds the necessary music licenses. However, 11%

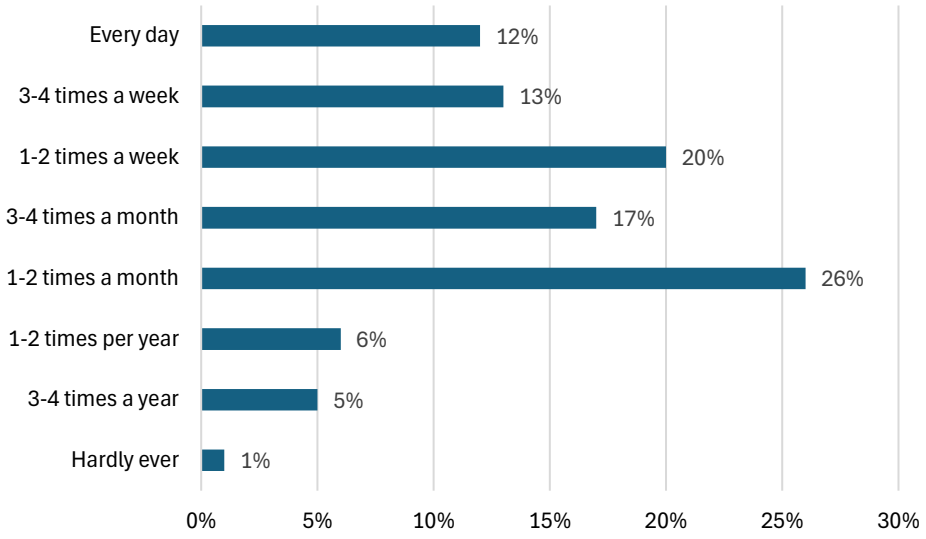
[18] The category "streaming services" does not distinguish between consumer platforms and professional providers, potentially conflating licensed and unlicensed use.

reported operating without licenses, which may indicate deliberate avoidance or limited enforcement. Equally noteworthy is the share of respondents (15%) who were unsure about their licensing status. This uncertainty points to possible information gaps: in some cases, staff may not be aware of back-office arrangements, while in others licensing costs may be bundled into contracts with streaming services, music providers, or other intermediaries. These findings also indicate broader knowledge gaps regarding licensing requirements. At the same time, current economic analyses typically do not account for such compliance uncertainty when estimating market values. It is also important to acknowledge that self-reported survey data on sensitive topics such as rule-breaking may understate the true extent of non-compliance, as respondents often avoid admitting even minor forms of illegality or misconduct (Tourangeau & Yan, 2007; Krumpal, 2013). From a policy perspective, these findings highlight that compliance depends not only on enforcement and willingness to pay, but also on awareness and clarity, with implications for both collecting societies and rightsholders.

3.3.3 The organization of live music events

In this section, we examine practices and their impact related to live music organization. The survey aims to collect detailed information on live music event organization. To improve recall and ensure comparability of responses, respondents were asked to report on live performances held within the past 12 months. Using a 12-month reference period is a standard practice in survey research, as it balances the need to capture sufficient activity with respondents' ability to provide accurate information, while also controlling for seasonality effects that are particularly relevant in the hospitality sector.

Figure 6 - Frequency of music events



More than half of establishments (56%) reported organizing live music events, including concerts, gigs, and DJ sets. The frequency of these events varies considerably across venues (Figure 6). The most common pattern is hosting live music once or twice a month (26% of respondents). Another

20% feature live performances once or twice a week, while 17% organize them three to four times per month. A smaller but significant share of venues offer live music on a more regular basis, with 13% hosting events three to four times a week and 12% presenting live music daily. At the other end of the spectrum, live music is held less frequently: 6% of establishments report organizing such events once or twice per year, 5% three to four times per year, and only 1% indicated 'hardly ever'. This distribution suggests that while live music is widespread, for most establishments it remains an occasional rather than a daily feature of their business model.

Table 13 - Frequency of music events by type of establishment

	Hotel	Restaurant	Fast Food & Cafés	Bars/Nightlife	Other
1-2 times a month	26%	26%	34%	15%	0%
1-2 times a week	19%	19%	14%	35%	0%
1-2 times per year	9%	4%	9%	0%	0%
3-4 times a month	17%	17%	26%	9%	100%
3-4 times a week	8%	19%	6%	18%	0%
3-4 times a year	6%	6%	3%	6%	0%
Every day	15%	10%	6%	18%	0%
Hardly ever	0%	1%	3%	0%	0%
Total	100%	100%	100%	100%	100%

Table 13Table 13 investigates if there are differences in frequencies of live music event organization by type of establishment. Fast Food & Cafés see the highest share of 1–2 times a month visits (34%), while Bars/Nightlife dominate the 1–2 times a week category (35%). Hotels and Restaurants share similar patterns, with peaks at 1–2 times a month (26%) and 1–2 times a week (19%). The Other category stands out with 100% of visits occurring 3–4 times a month only. Everyday visits are most common for Hotels (15%) and Bars/Nightlife (18%), suggesting steady customer engagement. Hardly ever is the least common frequency across all categories, particularly negligible for Hotels and Bars/Nightlife.

The questionnaire also investigated the types of live events organized by establishments. Over the past 12 months, venues have hosted a variety of live music performances. Bands were the most common, featured at 68% of establishments, followed by DJ sessions (51%) and solo artists (46%). Jam sessions were organized in 30% of venues, while classical ensembles appeared in 26%. Only 1% of respondents reported hosting other types of live performances. Respondents could select up to four types of performances. This distribution highlights the predominance of contemporary formats such as bands and DJs, while classical and niche performances play a comparatively smaller role in the hospitality sector.

Concerning the genre of the live events Table 14 reports the results. Pop music is by far the most popular genre, appearing in 70% of live events overall, with the largest share in restaurants (29%) followed by hotels (24%). Hip-Hop/Rap (39%), Dance/Electronic (38%), and Jazz (35%) are the next most common genres, again mainly concentrated in restaurants and hotels, but with bars/nightlife contributing notably to Hip-Hop/Rap and Dance/Electronic events. Opera (29%) and Country/Folk (27%) appear less frequently but still represent a meaningful portion of the music mix, especially in restaurants and hotels. R&B (22%) and Rock (19%) events are even less common, with minimal

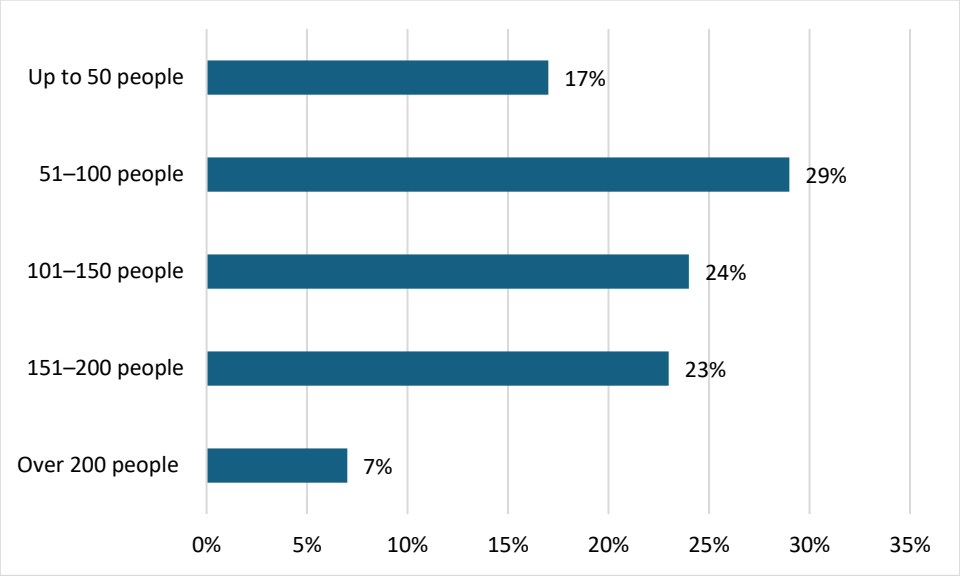
presence in fast food & cafés or bars/nightlife. Latin (12%), Experimental (6%), and Other (1%) genres have the lowest shares across all venue types.

Table 14 - Distribution of live music genres by establishment type

	Hotel	Restaurant	Fast Food & Cafés	Bars/Nightlife	Other	TOTAL
Pop music	24%	29%	8%	8%	0%	70%
Jazz	15%	14%	3%	3%	0%	35%
Hip-hop/rap	15%	15%	4%	5%	0%	39%
Dance and electronics	12%	17%	3%	6%	0%	38%
Opera	9%	14%	3%	2%	0%	29%
R&B	7%	11%	2%	2%	0%	22%
Rock	9%	6%	2%	2%	0%	19%
Latin	5%	5%	1%	1%	0%	12%
Country and folk	10%	14%	2%	2%	0%	27%
Experimental	3%	3%	0%	0%	0%	6%
Other	1%	0%	0%	0%	0%	1%
Note: Respondents could indicate up to four genres. Percentages therefore do not sum to 100.						

Having outlined the prevalence, formats, and audience sizes of live music events in hospitality venues, the survey next explored their perceived impact on business performance. As highlighted in Section 343.1, live music is not only an artistic or cultural offering but also a potential driver of economic outcomes, influencing customer attraction, spending behavior, and the overall positioning of the venue. At the same time, its contribution to business results may be shaped by organizational demands and additional costs—such as artist fees, equipment, licensing, and staffing—which can offset potential revenue gains. Previous studies suggest that while live music can enhance customer satisfaction and revenues, the financial returns are not guaranteed and depend on cost structures and venue characteristics. Understanding how establishments assess both the benefits, and the challenges of hosting live performances provides valuable insights into the role of music within their broader business models. The following sub-section presents results on revenue effects, customer dynamics, and the motivations behind organizing live music events.

Figure 7 - Capacity of the venue during live music performances



Most venues hosting live music events reported audience sizes between 51 and 100 people (29%). Events attracting 101–150 attendees accounted for 24%, while those with 151–200 participants represented 23%. Smaller-scale events with up to 50 people made up 17% of the total, and only 7% of venues reported hosting events with more than 200 attendees (Figure 7).

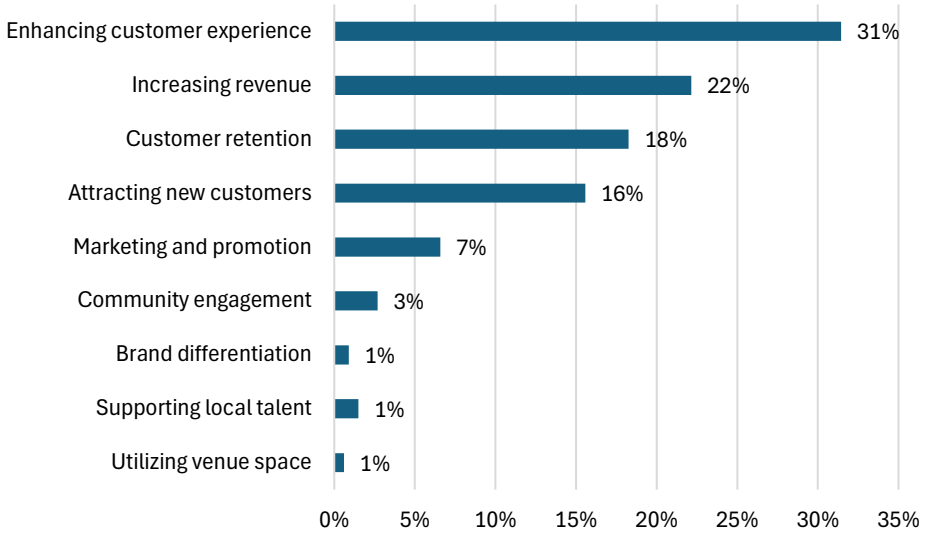
Table 15 - Location capacity by establishment type

	Hotel	Restaurant	Fast Food & Cafés	Bars/Nightlife	Other	TOTAL
Up to 50 people	29.1	36.4	18.2	16.4	0	100%
51 – 100 people	35.4	44.8	11.5	8.3	0	100%
101 -150 people	32.1	48.1	12.3	7.4	0	100%
151 – 200 people	44.2	44.2	2.6	7.8	1.3	100%
Over 200	29.2	41.7	8.3	20.8	0	100%

Table 15 shows differences across type of establishment. Small events (up to 50 people) account for 29–36% of live events in hotels and restaurants, with fast food & cafés (18%) and bars/nightlife (16%) hosting fewer. Mid-sized events (51–150 people) are most common in restaurants (45–48%) and hotels (32–35%), while fast food & cafés and bars/nightlife host smaller shares. Larger events (151–200 people) are nearly evenly split between restaurants (44%) and hotels (44%), with minimal shares elsewhere. The largest events (over 200 people) occur mostly in restaurants (42%) and hotels (29%), but bars/nightlife host 21%, making them the second-most likely venue for very large events. Beyond describing the frequency and formats of live events, the survey also explored the underlying reasons why establishments choose to organize live music, as well as the main challenges they face in doing so. Examining both motivations and barriers provides a fuller picture of how live music fits into the business strategies of hospitality venues. Among the venues that host live music, respondents identified several motivations for doing so (

Figure 8).

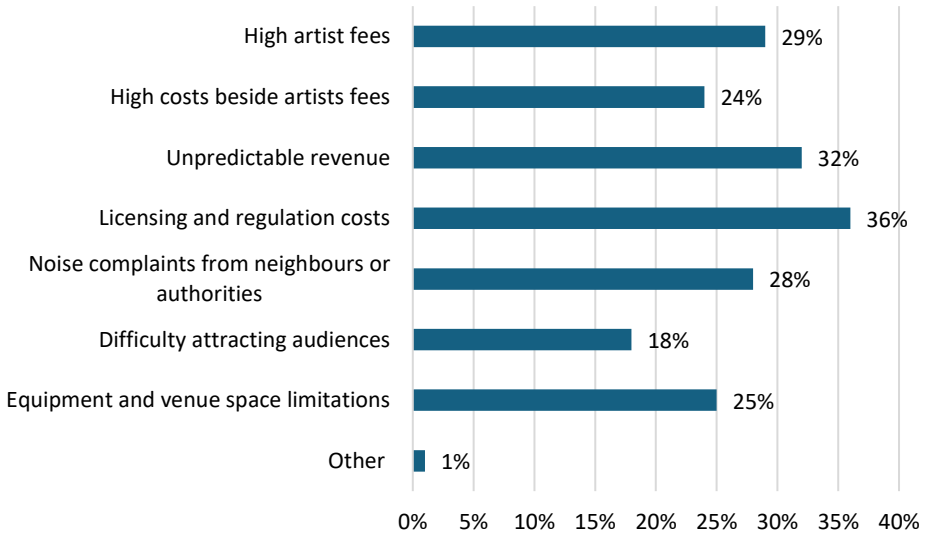
Figure 8- Main motivation for organizing live music events



The most common reason, cited by 31%, was to enhance the customer experience. Revenue generation ranked second (22%), followed by customer retention (18%) and attracting new customers (16%). Other motivations were less frequently mentioned, including marketing and promotion (7%), community engagement (3%), brand differentiation (1%), supporting local talent (1%), and making use of available venue space (1%). Overall, these responses suggest that live music is viewed primarily to enrich the customer experience and strengthen relationships, rather than solely as a direct driver of revenue.

Organizing live music events presents several challenges for hospitality venues and the questionnaire investigates the most salient ones. Figure 9 reports the results.

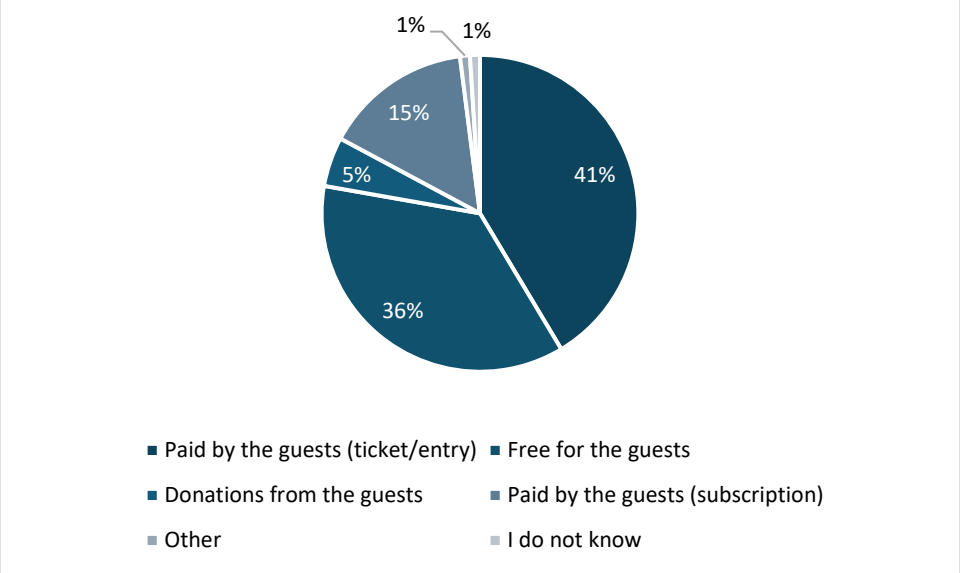
Figure 9 - Challenges in organizing live music events



The most frequently cited issues are licensing and regulatory costs (36%) and the unpredictability of revenue (32%). High artist fees (29%) and noise complaints (28%) also rank among the main concerns. Other challenges, such as additional costs beyond artist fees (24%) and limitations on equipment or venue space (25%), are moderately common. Difficulty in attracting audiences is less prominent but still noted by 18% of respondents. A very small share (1%) mentioned other, more specific challenges. Together, these results highlight how financial pressures, regulatory barriers, and operational constraints interact to shape the feasibility of hosting live music, making it a potentially high reward but high-risk strategy for venues.Figure 9 - Challenges in organizing live music events

Respondents identified revenue as the second most important motivation for organizing live music events (Figure 8). To better understand this aspect, the questionnaire also explored how such events are financed.

Figure 10 - Funding sources for live music events

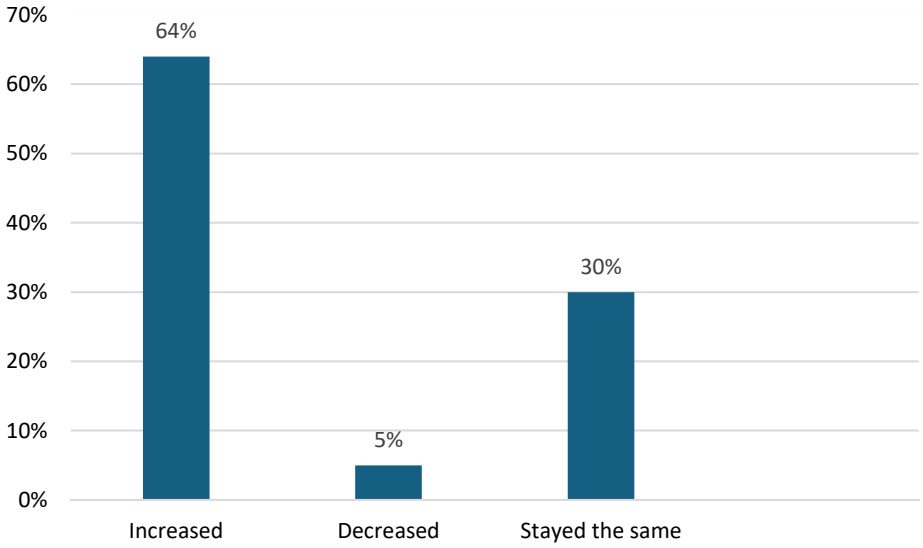


As shown in Figure 10, the most common model is direct guest contributions through tickets or entry fees (41%). A significant share of events (36%) are offered free of charge to guests, while 15% rely on voluntary donations. These financing models reflect different strategic orientations: some establishments view live music primarily as a direct source of revenue, while others use it as a tool to enhance customer experience and attract clientele.

When specifically asked about revenue changes on nights with live music compared to nights without, 46% reported a significant increase and 40% observed a slight increase. The main sources of revenue from live music events is increased food and beverage sales and ticket sales. By contrast, 11% noted no change, 2% reported a slight decrease, and 1% were unsure. Taken together, these results suggest that for most venues, live music contributes positively to revenues, even if the scale of the benefit varies.

Finally, the questionnaire asked respondents whether the number of live music events hosted at their establishment had changed over the past 12 months (Figure 11).

Figure 11 - Distribution of changes in live music events during the past year



64% of the respondents indicate an increase. Among those reporting growth, 40% indicated an increase of up to 25%, 47% noted a rise of 25–50%, and 12% reported an increase of more than 50%. None of these respondents was unsure about the change. By contrast, among those reporting a decline (5% of the total), 28% indicated a decrease of up to 25%, 50% reported a decline of 25–50%, and 17% experienced a drop of more than 50%. Only 6% of this group were uncertain about the trend. Concerning the motivation for decreasing the number of live events, respondents indicate budget constraints/higher costs, lower customer demand, noise complaints, staffing or logistical challenges, and legal restrictions. Taken together, the results suggest a highly heterogeneous picture: while many venues expanded their live music offerings, a substantial share experienced contraction, pointing to divergent dynamics within the sector.

3.4 Consumer perspectives on the role of background music in the hospitality sector

Results are available at: https://cloud.sinus-institut.de/public/7895b5

4 Conclusion

Measuring the music economy involves significant conceptual and empirical challenges. Any evaluation exercise must balance three elements: defining the scope of what is measured, aligning methodological rigor with the available data, and identifying the scope of potential policy recommendations. As Van der Hoeven et al. (2021) note, music valuation exercises depend heavily on aims, objectives, and the entities conducting them. These insights apply more broadly to the music economy, where methodological choices, data availability, and intended use of results must be carefully aligned.

This report addressed two key issues identified in OpenMusE Task 1.3. The first concerns what may be underrepresented in official statistics. To explore this, we compared Orbis coverage with Eurostat-SBS data to assess its usefulness for analyzing the music economy. The results indicate that Orbis coverage is highly country-specific, as differences arise from legal and administrative filing requirements, the quality of national business registers, and the role of multinational enterprises. Orbis tends to overrepresent large firms, which creates challenges for sectors like music that rely heavily on micro- and small enterprises. However, micro-firms are not absent: unlike SBS, Orbis records revenue data for some very small firms, making them at least partially visible. Orbis should therefore not be seen as a substitute for official statistics, but understanding its biases allows researchers to address specific issues more effectively—for example, studying cross-country firm dynamics—than is possible with administrative data, which often remains fragmented or inaccessible.

The second issue concerns the extent to which firm-level commercial databases can support the implementation of surveys, particularly for MSMEs. To explore this, we distributed a survey on the economic impact of music use in the hospitality sector via both email and a survey panel provider. Response rates for the email distribution were lower than expected. However, the high completion rate indicates that once respondents began, they engaged fully with the questionnaire, indicating that the primary challenge was in distribution rather than survey design. Possible factors include outdated or generic contact details in Orbis, invitations being filtered into spam folders, messages not reaching the most relevant staff, and the absence of monetary incentives, which likely reduced participants' motivation. On the contrary, results from the survey distributed through a panel shed light on patterns of music use in hospitality establishments under more favorable recruitment conditions. The survey indicates that background music is a distinctive feature of the hospitality sector, with most establishments playing it daily, primarily through streaming services, and 74% reporting compliance with licenses. Music is often strategically curated to shape customer experience and brand identity, with pop, jazz, and hip-hop as the most common genres, and selection methods influencing both diversity and atmosphere.

Taken together, these findings highlight both the opportunities and the limitations of using commercial firm-level data and survey tools to study the music economy.

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6 ANNEX

A. Notes to the replication of the CICERONE project exercise

Table 2 provides an update of the CICERONE Project and operationalize the different classification reported in Table 1. The below table indicates for the two approaches the proposed and implemented code. The used data are retrieved from the Eurostat sbs_ovw_act database available at https://ec.europa.eu/eurostat/databrowser/view/sbs_ovw_act$dv_1481/default/table?lang=en&category=cult.cult_ent

Table 16 - List of proposed and used NACE codes in the CICERONE Project and in OpenMusE

CICERONE Project			**Music component**		
	Proposal	Availability		Proposal	Availability of Nace codes on Eurostat
min	90.01+90.02+90.03+59.20+18.20+60.10+47.63+79.90+59.20	90*+18+47.63+59	min (only fully)	32.2	32.2
max (extensive)	90.01+90.02+90.03+59.20+18.20+60.10+47.63+79.90+59.20+60.20+73.1+58.11+58.14+82.30+91.01+91.02	90+18+60**+47.63+58.11+58.14+59+91.01+91.02	max (partial+fully)	18.2+32.2+47.63+59.2+60+73.1+90	18+32.2+47.63+59+60+90

* Cicerone uses NACE 90 only once in minimum even if it also use 90.01/90.03 elsewhere; this avoids double counting and matches the report.

** If a country lacks 60.10 / 60.20 but only has 60 at 2-digit level, either (A) leave broadcasting missing (strict replication) or (B) add 2-digit 60 only to maximum.

B. R code to replicate and update EUROSTAT figures.

To replicate and automatically update the tables containing Eurostat data presented in Section 2, we collaborated with UTU, a partner of the OpenMusE project and developer of the Eurostat R package. This package provides direct access to the Eurostat database, which can also be browsed online for datasets and documentation.

The R code used to replicate all Eurostat figures presented in Section 2 is available at: https://github.com/openmusiceurope/T1.3_music_economy

Variations on this method and code are used to create the OpenMusE Statistical Yearbooks, which are available at: https://github.com/openmusiceurope/T1.3_statistical_yearbook

C. The hospitality questionnaire distributed by e-mails

Hungary

Q 0.1 Does one of these activities describe your primary activity? (THE REPLY IS COMPULSORY)

- o Hotels and similar accommodation (1)
- o Holiday and other short-stay accommodation (3)
- o Full-service restaurants (6)
- o Fast food and quick-service restaurants (8)
- o Bars, pubs, and cocktail lounges (11)
- o Coffee shops and tea houses (14)
- o Street food vendors and food trucks (7)
- o Wine bars and tasting rooms (12)
- o Catering for corporate events, weddings, and parties (10)
- o Nightclubs and entertainment venues (15)
- o Resort and destination dining (5)
- o Craft breweries and microbreweries (13)
- o Themed restaurants (9)
- o Spa and wellness retreat services (2)
- o Camping grounds, recreational vehicle parks, and trailer parks (4)
- o No (17)

Skip To: End of Survey If Does one of these activities describe your primary activity? (THE REPLY IS COMPULSORY) = No

Q 0.2 What is the level of service provided by the venue? Please select the appropriate category:

- o Category 1: Catering establishments offering services equivalent to 4 and 5 star establishments (1)
- o Category 2: Catering establishments offering services equivalent to 3 star establishments (2)
- o Category 3: Catering establishments equivalent to 2 star establishments (3)
- o Category 4: Catering establishments offering services equivalent to 1 star establishments (4)
- o Category 5: Restaurants, pubs, wine bars, lounge bars, espresso bars, cafes, coffee houses, tea houses, patisseries, food and salad bars and other catering establishments whose appearance and services exceed the standard of a typical 3 star establishment (5)
- o Category 6: Drink bars, pubs, taverns, buffets and other venues that do not meet the standards of Category 5 establishments (6)
- o Category 7: Confectioneries and ice cream parlors that do not sell alcoholic beverages and do not meet the requirements for businesses in Category 6 (7)

Display this question:
If What is the level of service provided by the venue? Please select the appropriate category: = Category 1: Catering establishments offering services equivalent to 4 and 5 star establishments

Or What is the level of service provided by the venue? Please select the appropriate category: = Category 2: Catering establishments offering services equivalent to 3 star establishments
Or What is the level of service provided by the venue? Please select the appropriate category: = Category 3: Catering establishments equivalent to 2 star establishments
Or What is the level of service provided by the venue? Please select the appropriate category: = Category 4: Catering establishments offering services equivalent to 1 star establishments

Q 0.3 Are you
o 5-star, 4-star, 3-star, 2-star, or 1-star hotel (1)
o guest house (2)

Display this question:
If Are you = 5-star, 4-star, 3-star, 2-star, or 1-star hotel

Q 0.4 How many rooms do you have? (for 5-star, 4-star, 3-star, 2-star, or 1-star hotel)
o up to 25 rooms (1)
o 26-50 rooms (2)
o 51-100 rooms (3)
o 101-150 rooms (4)
o 151-200 rooms (5)
o 201-250 rooms (6)
o 251-300 rooms (7)
o 301-350 rooms (8)
o 351-400 rooms (9)
o 401-500 rooms (10)
o above 500 rooms (11)

Display this question:
If Are you = guest house

Q 0.5 How many rooms do you have? (for guest house)
o up to 6 rooms (1)
o 7 rooms (2)
o 8 rooms (3)
o 9 rooms (4)
o 10 rooms (5)
o 11 rooms (6)
o 12 rooms (7)
o 13 rooms (8)
o 14 rooms (9)
o 15 rooms (10)
o 16 rooms (11)
o 17 rooms (12)

o 18 rooms (13)
o 19 rooms (14)
o 20 rooms (15)
o 21 rooms (16)
o 22 rooms (17)
o 23 rooms (18)
o 24 rooms (19)
o 25 rooms (20)

Display this question:
If Are you = guest house

Q 0.6 Does your venue offer the following? (for guest house)
o Mechanical music in rooms (1)
o Simultaneous, unchanged, and unaltered retransmission (e.g. TV, radio broadcasts, streaming) (2)

Q 0.7 Where is your venue located?
o Budapest (1)
o City with population over 50,000 (2)
o Town (10,001–50,000) (21)
o Small town (5,001–10,000) (22)
o Village (1,001–5,000) (23)
o Rural settlement (under 1,000) (24)

Q 0.8 On an average day when does the venue open and close?
▢ Opening time (1) _____
▢ Closing time (2) _____

Q 0.9 Are you currently licensed for public music use through ARTISJUS?
o Yes (1)
o No (2)
o I'm not sure (21)

Q 1.1 What is the capacity of your business? Please, choose the most relevant measure for your business:
o Maximum capacity in number of persons (1) _____
o Number of tables (2) _____
o Number of rooms (3) _____
o Squared meters (4) _____

Q 1.2 In what year was your business established?

_____
_____
_____
_____
_____

Q 1.3 What is the size of your business in terms of full-time employees?
o 1 person (self-employed) (1)
o 2 persons (2)
o 3 persons (3)
o 4 persons (4)
o 5 persons (5)
o 5-10 persons (6)
o 10-20 persons (7)
o 20-30 persons (8)
o 30-50 persons (9)
o Above 50 persons (10)

Q 1.4 Is your business family-run?
o Yes (1)
o No (2)

Q 1.5 Is the annual turnover of your venue approximately
o Up to 190,000 Ft (1)
o 190,000 Ft – 380,000 Ft (2)
o 380,380 Ft – 1,900,000 Ft (3)
o 1,900,000 Ft – 7,600,000 Ft (4)
o 7,600,000 Ft – 19,000,000 Ft (5)
o 19,000,000 Ft – 57,000,000 Ft (8)
o 57,000,000 Ft – 152,000,000 Ft (9)
o 152,000,000 Ft – 304,000,000 Ft (10)
o Above 304,000,000 Ft (11)

Q 1.6 What are your business's usual opening days? (Select all that apply)
☐ Monday (1)
☐ Tuesday (2)
☐ Wednesday (3)
☐ Thursday (4)
☐ Friday (5)
☐ Saturday (6)
☐ Sunday (7)

Q 1.7 Do you play background music in your establishment?
o No (1)

o Yes (2)

Display this question:
If Do you play background music in your establishment? = Yes

Q 2.1 How do you obtain your background music?

- ☐ Streaming services (e.g., Spotify, Apple Music, etc.) (1)
- ☐ Licensed music providers (e.g., Soundtrack Your Brand, Mood Media, etc.) (2)
- ☐ Purchased music (CDs, digital downloads, etc.) (3)
- ☐ Radio or TV (4)
- ☐ Other (please specify) (5) _____

Display this question:
If Do you play background music in your establishment? = Yes

Q 2.2 What type of equipment does your venue use to play background music? (Select all that apply)

- ☐ Built-in sound system (e.g., ceiling speakers, amplifiers) (1)
- ☐ Portable speakers (e.g., Bluetooth or standalone) (2)
- ☐ Portable devices such as tablet or computer (3)
- ☐ Radio or traditional media player (CD, MP3) (4)
- ☐ Other, please specify: (8) _____

Display this question:
If Do you play background music in your establishment? = Yes

Q 2.3 How many days per month do you typically play background music?

- ☐ Occasionally (1)
- ☐ Less than half the month (2)
- ☐ About half the month (3)
- ☐ Most days (4)
- ☐ Every day I am open (5)

Display this question:
If Do you play background music in your establishment? = Yes

Q 2.4 What genres of music do you have played in your establishment? (select up to 4 genres)

- ☐ Pop (1)
- ☐ Rock (2)
- ☐ Hip-Hop / Rap (3)
- ☐ Dance / Electronic (4)
- ☐ Latin (5)
- ☐ R&B (6)

- ☐ Classical / Opera (7)
- ☐ Country (8)
- ☐ Jazz (9)
- ☐ Folk (10)
- ☐ Experimental (11)
- ☐ Other (please specify) (12) _____

Display this question:
If Do you play background music in your establishment? = Yes

Q 2.5 Do you consider the music played in your establishment is a distinctive feature of your venue?
- o Yes (1)
- o No (2)

Display this question:
If Do you play background music in your establishment? = Yes

Q 2.6 How is the music played in your establishment selected?
- o Carefully curated or planned to match the atmosphere and customer experience (1)
- o Randomly selected or played by chance (2)
- o A mix of both (3) _____
- o Other (please specify) (4)

Q 3.1 Do you organize live music events at your venue?
- o Yes (1)
- o No (2)

Skip To: End of Survey If Do you organize live music events at your venue? = No
Q 3.2 What type of equipment does your venue have available for live music performances? (Select all that apply)
- ☐ Professional PA system (mixer, amplifiers, speakers) (10)
- ☐ Microphones (wired or wireless) (11)
- ☐ Stage lighting (12)
- ☐ Musical instruments (e.g., piano, drum set, guitar) (13)
- ☐ DJ equipment (e.g., turntables, DJ controller) (14)
- ☐ Dedicated stage area (15)
- ☐ Sound technician/operator on-site (16)

Q 3.3 What is the typical capacity of your venue during live music performances?
- o Up to 50 people (6)
- o 51–100 people (7)
- o 101–150 people (8)
- o 151–200 people (9)

o Over 200 people (please specify) (10) _____

Q 3.4 What types of live music performances has your establishment hosted in the past 12 months?

- ☐ Solo artists (1)
- ☐ Bands (2)
- ☐ DJ sessions (3)
- ☐ Jam sessions (4)
- ☐ Classical ensembles (5)
- ☐ Other (please specify) (6) _____

Q 3.5 How frequently have these performances taken place at your establishment in the past 12 months?

	Solo artists (1)	Bands (2)	DJ sessions (3)	Jam sessions (4)	Classical ensembles (5)	Other (6)
Every day (1)	o	o	o	o	o	o
5-6 times a week (2)	o	o	o	o	o	o
3-4 times a week (3)	o	o	o	o	o	o
1-2 times a week (4)	o	o	o	o	o	o
3-4 times a month (5)	o	o	o	o	o	o
1-2 times a month (6)	o	o	o	o	o	o
3-4 times a year (7)	o	o	o	o	o	o
1-2 times a year (8)	o	o	o	o	o	o
Hardly ever (9)	o	o	o	o	o	o
I don't know (10)	o	o	o	o	o	o

Q 3.6 Over the past year, has the number of live music performances in your venue:

- o increased (1)
- o decreased (2)
- o stayed the same (3)

Q 3.7 By how much has the number of live music performances in your venue increased/decreased:

o one day/night per week (1)
o two days/nights per week (2)
o three days/nights per week (3)
o four days/nights per week (4)
o five days/nights per week (5)
o six days/nights per week (6)
o other (7)

Display this question:
If Over the past year, has the number of live music performances in your venue: = decreased

Q 3.8 In order of importance (1-6), why does your venue provide less live performances now compared to a year ago?
_____ number of patrons (1)
_____ cost of compliance with planning regulations (2)
_____ cost of compliance with liquor licensing conditions (3)
_____ staff costs (4)
_____ noise complaints by local residents (5)
_____ other (specify) (6)

Q 3.9 What genres of music have you played live in your establishment in the past 12 months? (select up to 4 genres)
☐ Pop (1)
☐ Rock (2)
☐ Hip-Hop / Rap (3)
☐ Dance / Electronic (4)
☐ Latin (5)
☐ R&B (6)
☐ Classical / Opera (7)
☐ Country (8)
☐ Jazz (9)
☐ Folk (10)
☐ Experimental (11)
☐ Other (please specify) (12) _____

Q 3.10 Are live music events at your venue free for customers, do you charge an entry fee, or do you accept donations?
o Free (1)
o Donations (2)
o Paid (ticket/entry) (3)
o Paid (subscription) (4)
o Other (specify) (5)

Display this question:
If Are live music events at your venue free for customers, do you charge an entry fee, or do you ac... = Paid (ticket/entry)

Q 3.11 What are the minimum and maximum ticket prices for live performances at your establishment?
o Minimum price (HUF): (1) _____
o Maximum price (HUF): (2) _____

Display this question:
If Are live music events at your venue free for customers, do you charge an entry fee, or do you ac... = Donations

Q 3.12 Do you generate revenue from hosting live music events at your establishment?
o Yes (1)
o No (2)

Q 3.13 What are the main sources of revenue from live music events at your venue?
o ticket sales (1)
o increased food and beverage sales (2)
o sponsorships (3)
o merchandise sales (4)
o donations (5)
o other (specify) (6) _____

Q 3.14 What percentage of your revenues has come from live music events in the past 12 months?
0 10 20 30 40 50 60 70 80 90 100

Click to write the number ()

Q 3.15 How does your revenue change when there is live music compared to non-live music nights?
o increases significantly (1)
o increases slightly (2)
o no change (3)
o decreases slightly (4)
o decreases significantly (5)
o not sure (6)

Display this question:
If How does your revenue change when there is live music compared to non-live music nights? = increases significantly
Or How does your revenue change when there is live music compared to non-live music nights? = increases slightly

Q 3.16 For each night of the week, can you indicate if your venue is typically open for business, typically providing live music, and if providing live music by approximately what % turnover increases (ex. ticket sales/door charge – i.e. food and beverage sales only)?

	Open	Live Music		Increase in Turnover (%)			
	Yes (1)	No (2)	Yes (1)	No (2)	% (1)		
Monday (1)	o		o		o		o
Tuesday (2)	o		o		o		o
Wednesday (3)		o		o		o		o
Thursday (4)	o		o		o		o
Friday (5)	o		o		o		o
Saturday (6)	o		o		o		o
Sunday (7)	o		o		o		o

Display this question:
If Do you generate revenue from hosting live music events at your establishment? = No
Q 3.17 What motivates you to organize live music events at your venue?
o Increasing revenue (1)
o Enhancing customer experience (2)
o Customer retention (3)
o Attracting new customers (4)
o Marketing and promotion (5)
o Brand differentiation (6)
o Supporting local talent (7)
o Community engagement (8)
o Utilizing venue space (9)
o Other (specify) (10) _____

Q 3.18 Have you observed an increase in new customers on live music nights?
o Yes, significantly (1)
o Yes, somewhat (2)
o No noticeable impact (3)

Q 3.19 What are the biggest challenges of hosting live music at your venue? (Select all that apply)
☐ High artist fees (1)
☐ Licensing and regulation costs (2)
☐ Noise complaints from neighbours or authorities (3)
☐ Difficulty attracting audiences (4)
☐ Equipment and venue space limitations (5)
☐ Unpredictable revenue (6)
☐ Other (please specify) (7) _____

End of Block: Default Question Block

Slovakia

Q 0.1 Does one of these activities describe your primary activity? (THE REPLY IS COMPULSORY)
- o Hotels and similar accommodation (1)
- o Holiday and other short-stay accommodation (3)
- o Full-service restaurants (6)
- o Fast food and quick-service restaurants (8)
- o Bars, pubs, and cocktail lounges (11)
- o Coffee shops and tea houses (14)
- o Street food vendors and food trucks (7)
- o Wine bars and tasting rooms (12)
- o Catering for corporate events, weddings, and parties (10)
- o Nightclubs and entertainment venues (15)
- o Resort and destination dining (5)
- o Craft breweries and microbreweries (13)
- o Themed restaurants (9)
- o Spa and wellness retreat services (2)
- o Camping grounds, recreational vehicle parks, and trailer parks (4)
- o No (17)

Skip To: End of Survey If Does one of these activities describe your primary activity? (THE REPLY IS COMPULSORY) = No

Q 0.2 Are you currently licensed for public music use through SOZA?
- o Yes (1)
- o No (2)
- o I'm not sure (3)

End of Block: Block 0. Screening questions

Start of Block: Block 1. DEMOGRAPHIC AND BACKGROUND QUESTIONS

Q1.1 What is the capacity of your business? Please, choose the most relevant measure for your business:
- o Maximum capacity in number of persons (1)

_____
- o Number of tables (2) _____
- o Number of rooms (3) _____
- o Squared meters (4) _____

Q 1.2 In what year was your business established?

_____

Q1.3 What is the size of your business in terms of full-time employees?

o 1 person (self-employed) (1)
o 2 persons (2)
o 3 persons (3)
o 4 persons (4)
o 5 persons (5)
o 5-10 persons (6)
o 10-20 persons (7)
o 20-30 persons (8)
o 30-50 persons (9)
o Above 50 persons (10)

Q1.4 Is your business family-run?
o Yes (1)
o No (2)

Q 1.5 Is the annual turnover of your venue approximately
o Up to €500 (1)
o €500– €1,000 (2)
o €1,001– €5,000 (3)
o €5,001– €10,000 (4)
o €10,001 – €20,000 (5)
o €20,001-€50,000 (8)
o €50,001-€150,000 (9)
o €150,001 – €400,000 (10)
o Above €400,000 (11)

Q 1.6 What are your business's usual opening days? (Select all days that apply)
▢ Monday (1)
▢ Tuesday (2)
▢ Wednesday (3)
▢ Thursday (4)
▢ Friday (5)
▢ Saturday (6)
▢ Sunday (7)

Q 1.7 Do you play background music in your establishment?
o No (1)
o Yes (2)

End of Block: Block 1. DEMOGRAPHIC AND BACKGROUND QUESTIONS

Start of Block: BLOCK 2: EXPLORE SOME CHARACTERISTICS OF ONLY PLAYING MUSIC
Display this question:
If Do you play background music in your establishment? = Yes

Q 2.1 How do you obtain your background music?

- ☐ Streaming services (e.g., Spotify, Apple Music, etc.) (1)
- ☐ Licensed music providers (e.g., Soundtrack Your Brand, Mood Media, etc.) (2)
- ☐ Purchased music (CDs, digital downloads, etc.) (3)
- ☐ Radio or TV (4)
- ☐ Other, please specify: (5) _____

Display this question:
If Do you play background music in your establishment? = Yes

Q2.2 What type of equipment does your venue use to play background music? (Select all that apply)

- ☐ Built-in sound system (e.g., ceiling speakers, amplifiers) (1)
- ☐ Portable speakers (e.g., Bluetooth or standalone) (2)
- ☐ Portable devices such as tablet or computer (3)
- ☐ Radio or traditional media player (CD, MP3) (4)
- ☐ Other, please specify: (8) _____

Display this question:
If Do you play background music in your establishment? = Yes

Q2.3 How many days per month do you typically play background music?

- ☐ Occasionally (1)
- ☐ Less than half the month (2)
- ☐ About half the month (3)
- ☐ Most days (4)
- ☐ Every day I am open (5)

Display this question:
If Do you play background music in your establishment? = Yes

Q2.4 What genres of music do you have played in your establishment? (select up to 4 genres)

- ☐ Pop (1)
- ☐ Rock (2)
- ☐ Hip-Hop / Rap (3)
- ☐ Dance / Electronic (4)
- ☐ Latin (5)
- ☐ R&B (6)
- ☐ Classical / Opera (7)
- ☐ Country (8)
- ☐ Jazz (9)
- ☐ Folk (10)
- ☐ Experimental (11)
- ☐ Other (please specify) (12) _____

Display this question:
If Do you play background music in your establishment? = Yes

Q2.5 Do you consider the music played in your establishment a distinctive feature of your business?
o Yes (1)
o No (2)

Display this question:
If Do you play background music in your establishment? = Yes

Q 2.6 How is the music played in your establishment selected?
o Carefully curated or planned to match the atmosphere and customer experience (1)
o Randomly selected or played by chance (2)
o A mix of both (3)
o Other (please specify) (4) _____
End of Block: BLOCK 2: EXPLORE SOME CHARACTERISTICS OF ONLY PLAYING MUSIC

Start of Block: BLOCK 3: EXPLORE SOME CHARACTERISTICS OF LIVE MUSIC PLAYING
Q 3.1 Do you organize live music events at your venue?
o Yes (1)
o No (2)

Skip To: End of Survey If Do you organize live music events at your venue? = No

Q 3.2. What type of equipment does your venue have available for live music performances? (Select all that apply)
▢ Professional PA system (mixer, amplifiers, speakers) (10)
▢ Microphones (wired or wireless) (11)
▢ Stage lighting (12)
▢ Musical instruments (e.g., piano, drum set, guitar) (13)
▢ DJ equipment (e.g., turntables, DJ controller) (14)
▢ Dedicated stage area (15)
▢ Sound technician/operator on-site (16)

Q 3.3 What is the typical capacity of your venue during live music performances?
o Up to 50 people (6)
o 51–100 people (7)
o 101–150 people (8)
o 151–200 people (9)
o Over 200 people (please specify) (10)
_____

Q 3.4 What types of live music performances has your establishment hosted in the past 12 months?

- ☐ Solo artists (1)
- ☐ Bands (2)
- ☐ DJ sessions (3)
- ☐ Jam sessions (4)
- ☐ Classical ensembles (5)
- ☐ Other (please specify) (6) _____

Q3.5 How frequently have these performances taken place at your establishment in the past 12 months?

	Solo artists (1)	Bands (2)	DJ sessions (3)	Jam sessions (4)	Classical ensembles (5)	Other (6)
Every day (1)	o	o	o	o	o	o
5-6 times a week (2)	o	o	o	o	o	o
3-4 times a week (3)	o	o	o	o	o	o
1-2 times a week (4)	o	o	o	o	o	o
3-4 times a month (5)	o	o	o	o	o	o
1-2 times a month (6)	o	o	o	o	o	o
3-4 times a year (7)	o	o	o	o	o	o
1-2 times a year (8)	o	o	o	o	o	o
Hardly ever (9)	o	o	o	o	o	o
I don't know (10)	o	o	o	o	o	o

Q3.6 Over the past year, has the number of live music performances in your venue:

- o increased (1)
- o decreased (2)
- o stayed the same (3)

Q 3.7 By how much has the number of live music performances in your venue increased/decreased:

- o one day/night per week (1)
- o two days/nights per week (2)
- o three days/nights per week (3)
- o four days/nights per week (4)

o five days/nights per week (5)
o six days/nights per week (6)
o other (7) _____

Display this question:
If Over the past year, has the number of live music performances in your venue: = decreased

Q3.8 In order of importance (1-6), why does your venue provide less live performances now compared to a year ago?
_____ number of patrons (1)
_____ cost of compliance with planning regulations (2)
_____ cost of compliance with liquor licensing conditions (3)
_____ staff costs (4)
_____ noise complaints by local residents (5)
_____ other, please specify: (6)

Q3.9 What genres of music have you played live in your establishment in the past 12 months? (select up to 4 genres)
☐ Pop (1)
☐ Rock (2)
☐ Hip-Hop / Rap (3)
☐ Dance / Electronic (4)
☐ Latin (5)
☐ R&B (6)
☐ Classical / Opera (7)
☐ Country (8)
☐ Jazz (9)
☐ Folk (10)
☐ Experimental (11)
☐ Other, please specify: (12) _____

Q3.10 Are live music events at your venue free for customers, do you charge an entry fee, or do you accept donations?
o Free (1)
o Donations (2)
o Paid (ticket/entry) (3)
o Paid (subscription) (4)
o Other, please specify (5) _____

Display this question:
If Are live music events at your venue free for customers, do you charge an entry fee, or do you ac... = Paid (ticket/entry)

Q3.11 What is the average ticket price per person for live performances at your establishment?
o €0–€5 (1)

o €5.01–€10 (2)
o €10.01–€20 (3)
o Over €20 (please specify) (4)
_____

Display this question:
If Are live music events at your venue free for customers, do you charge an entry fee, or do you ac... = Donations

Q3.12 Do you generate revenue from hosting live music events at your establishment?
o Yes (1)
o No (2)

Q 3.13 What are the main sources of revenue from live music events at your venue?
o ticket sales (1)
o increased food and beverage sales (2)
o sponsorships (3)
o merchandise sales (4)
o donations (5)
o other (specify) (6) _____

Q 3.14 What percentage of your revenues has come from live music events in the past 12 months?
0 10 20 30 40 50 60 70 80 90 100
Click to write the number ()

Q 3.15 How does your revenue change when there is live music compared to non-live music nights?
o increases significantly (1)
o increases slightly (2)
o no change (3)
o decreases slightly (4)
o decreases significantly (5)
o not sure (6)

Display this question:
If How does your revenue change when there is live music compared to non-live music nights? = increases significantly
Or How does your revenue change when there is live music compared to non-live music nights? = increases slightly

Q 3.16 For each night of the week, can you indicate if your venue is typically open for business, typically providing live music, and if providing live music by approximately what % turnover increases (ex. ticket sales/door charge – i.e. food and beverage sales only)?
Open Live Music Increase in Turnover (%)

	Yes (1)	No (2)	Yes (1)	No (2)	% (1)			
Monday (1)	o		o		o		o	
Tuesday (2)	o		o		o		o	
Wednesday (3)		o		o		o		o
Thursday (4)	o		o		o		o	
Friday (5)	o		o		o		o	
Saturday (6)	o		o		o		o	
Sunday (7)	o		o		o		o	

Display this question:
If Do you generate revenue from hosting live music events at your establishment? = No

Q 3.17 What motivates you to organize live music events at your venue?
- o Increasing revenue (1)
- o Enhancing customer experience (2)
- o Customer retention (3)
- o Attracting new customers (4)
- o Marketing and promotion (5)
- o Brand differentiation (6)
- o Supporting local talent (7)
- o Community engagement (8)
- o Utilizing venue space (9)
- o Other, please specify: (10) _____

Q 3.18 Have you observed an increase in new customers on live music nights?
- o Yes, significantly (1)
- o Yes, somewhat (2)
- o No noticeable impact (3)

Q3.19 What are the biggest challenges of hosting live music at your venue? (Select all that apply)
- ▢ High artist fees (1)
- ▢ Licensing and regulation costs (2)
- ▢ Noise complaints from neighbours or authorities (3)
- ▢ Difficulty attracting audiences (4)
- ▢ Equipment and venue space limitations (5)
- ▢ Unpredictable revenue (6)
- ▢ Other, please specify: (7) _____

Q3.20 Do you rent your venue for private or corporate events with music (e.g., weddings, banquets)?
- o Yes (2)
- o No (3)

Display this question:

If Do you rent your venue for private or corporate events with music (e.g., weddings, banquets)? = Yes

Q3.21 How many such private events with music did you host in the past 12 months?
- o 1-2 (1)
- o 3-5 (2)
- o 6-10 (3)
- o 11-20 (4)
- o More than 20 (5)

End of Block: BLOCK 3: EXPLORE SOME CHARACTERISTICS OF LIVE MUSIC PLAYING

D. The hospitality questionnaire distributed by the professional company DYNATA

Start of Block: SQ1: Employment status

SQ 1 Which of the following best describes your employment status?

o Full-time (30 or more hours per week) (1)
o Part-time (4)
o Contract, Freelance or Temporary Employee (5)
o Self-employed (6)
o Semi-retired (7)
o Retired (8)
o Homemaker (9)
o Stay-at-Home Parent (10)
o Full-time Student (11)
o Part-time Student (working MORE than 30 hours per week) (12)
o Part-time Student (working LESS than 30 hours per week) (13)
o Unemployed (14)
o Disabled (15)
o None of the above (16)

End of Block: SQ1: Employment status

Start of Block: SQ 2

SQ 2 Which of the following best describes the industry segment of the company/organization for which you work?

o Advertising / Telesales / Telemarketing (1)
o Aerospace / Aviation (4)
o Agriculture / Fishing (5)
o Armed Services /Defense / Military Services (6)
o Banking / Financial Services/ Insurance/ Business Services (Staffing, Printing) / Consulting / PR (8)
o Civil Service / Local Government / Government/ Social Services (11)
o Computer / Communications and Information / Internet / Web Development (12)
o Construction / Building Materials (16)
o Education / Training / Development (20)
o Electronics (21)
o Engineering (22)
o Entertainment / Leisure / Recreation (23)
o Fashion / Luxury Goods / Cosmetic Products /Film / TV / Radio / Media (24)
o Food / Beverage / Restaurant (26)
o Healthcare / Medical (28)
o Law / Legal Services (31)
o Manufacturing / automotive / Textiles (32)
o Market Research / Marketing (33)
o Mining / Quarrying (36)
o Petroleum / Petrochemicals/ Pharmaceutical / Chemical/ Plastics (37)

o Printing / Publishing (39)
o Property / Real Estate (40)
o Religious / Not-For-Profit (43)
o Retail / Wholesale Trade (44)
o Telecommunications (45)
o Transportation / Distribution (50)
o Travel / Tourism / Hospitality (51)
o Utilities (Electricity, Gas, Water) (52)
o None of the above (53)
End of Block: SQ 2

Start of Block: SQ 3
SQ 3 Which of the following categories best describes the primary activities of your workplace? (You may select up to three options)
☐ Hotels and similar accommodation (1)
☐ Holiday and other short-stay accommodation (2)
☐ Full-service restaurants (3)
☐ Fast food and quick-service restaurants (4)
☐ Bars, pubs, and cocktail lounges (5)
☐ Coffee shops and tea houses (6)
☐ Street food vendors and food trucks (7)
☐ Wine bars and tasting rooms (8)
☐ Catering for corporate events, weddings, and parties (9)
☐ Nightclubs and entertainment venues (10)
☐ Resort and destination dining (11)
☐ Craft breweries and microbreweries (12)
☐ Themed restaurants (13)
☐ Spa and wellness retreat services (14)
☐ Camping grounds, recreational vehicle parks, and trailer parks (15)
☐ Other: (16) _____
End of Block: SQ 3

Start of Block: SQ 4
SQ 4 Which best describes your current level in your organization?
o Owner / Partner (2)
o Senior Management (CEO / VP / Managing Director) (4)
o Middle Management (Director / Divisional / Department Head) (5)
o Front Line Management (6)
o Experienced: Professional or Non-Management (7)
o Entry Level (8)
o Home Based Business Owner (9)
o Other (10)
End of Block: SQ 4

Start of Block: SQ 5
SQ 5 Is background music played at the place where you work? (This refers to music played in areas used by customers, and not, for example, in a restaurant's kitchen)
o No (1)
o Yes (2)
End of Block: SQ 5

Start of Block: Default Question Block
We are a research team from the Sant'Anna School of Advanced Studies in Italy. This survey is part of the project Open Music Europe, funded by the European Union under Horizon Europe (grant no. 101095295). The purpose of this survey is to gather information on how music is used in the hospitality sector and to estimate the potential economic value of this usage.
End of Block: Default Question Block

Start of Block: Demographic
Q 1.3 How long have you been working at your current workplace?
o Less than 6 months (1)
o 6 months to 1 year (2)
o 1–3 years (3)
o 3–5 years (4)
o More than 5 years (5)

Q 1.4 What type of work do you mainly do (e.g., Kitchen, Service, Room, Bar, Other), and what is your level of autonomy (High, Medium, Low)? (If you perform more than one task, please refer to the most important one.)

	High-autonomy (Executive Chef, Sous Chef, Restaurant Manager, Hotel Manager) (1)	Medium autonomy (Line Cook, Pastry Chef, Waiter, Bartender) (2)	Low autonomy (Commis Chef, Dishwasher, Housekeeper) (3)
Kitchen (1)	o	o	o
Service (2)	o	o	o
Room (3)	o	o	o
Bar (4)	o	o	o
Other (5)	o	o	o

Q 1.5 Is the place you work family-run?
o Yes (1)
o No (2)
o I do not know (3)
End of Block: Demographic

Start of Block: Workplace information
Q 2.1 What is the capacity of the place where you work? Please, choose the most relevant measure for the type of business:

o Maximum capacity in number of persons (1) _____

o Number of tables (2) _____

o Number of rooms (3) _____

o Squared meters (4) _____

Q 2.2 How many full-time employees work at your workplace?

o 0 person (self-employed) (12)
o 1 person (1)
o 2 persons (2)
o 3 persons (3)
o 4 persons (4)
o 5 persons (5)
o 5-10 persons (6)
o 10-20 persons (7)
o Above 20 persons (10)
o I do not know (11)

Q 2.3 What is the size of the business you work for, in terms of annual revenues?

o Less than €100,000 (1)
o €100,000 – €250,000 (2)
o €250,000 – €500,000 (3)
o €500,000 – €1 million (4)
o €1 million – €5 million (5)
o €5 million – €15 million (6)
o €15 million – €50 million (7)
o More than €50 million (8)
o I do not know (9)

Q 2.4 What is the population of city where you work?

o More than 500,000 inhabitants (1)
o 100,001 to 500,000 inhabitants (2)
o 20,001 to 100,000 inhabitants (3)
o 5,000 to 20,000 inhabitants (4)
o Fewer than 5,000 inhabitants (5)

Q 2.5 On which days is the venue where you work usually open? (Select all that apply)

☐ Monday (1)
☐ Tuesday (2)
☐ Wednesday (3)
☐ Thursday (4)
☐ Friday (5)
☐ Saturday (6)
☐ Sunday (7)

Q 2.6 On an average day, what are the opening and closing times of the venue where you work?

☐ Opening time (1) _____

☐ Closing time (2) _____

End of Block: Workplace information

Start of Block: Background music information

Display this question:

If Is background music played at the place where you work? (This refers to music played in areas use... = Yes

Q 3.2 How many days per month is background music typically played at the venue where you work? (This refers to music played in areas used by customers, and not, for example, in a restaurant's kitchen)

☐ Every day (1)

☐ Most days (2)

☐ About half the month (3)

☐ Less than half the month (4)

☐ Occasionally (5)

Display this question:

If Is background music played at the place where you work? (This refers to music played in areas use... = Yes

Q 3.3 Is the music played at the place where you work considered a distinctive feature of the venue? (This refers to music played in areas used by customers, and not, for example, in a restaurant's kitchen)

o Yes (1)

o No (2)

Display this question:

If Is background music played at the place where you work? (This refers to music played in areas use... = Yes

Q 3.4 How is the music selected at the place where you work? (This refers to music played in areas used by customers, and not, for example, in a restaurant's kitchen)

o Carefully curated or planned to match the atmosphere and customer experience (1)

o Randomly selected or played by chance (2)

o A mix of both (3)

o Chosen from the person on duty (6)

o Other (please specify) (4) _____

Display this question:

If Is background music played at the place where you work? (This refers to music played in areas use... = Yes

Q 3.5 What music genres are played at the venue where you work? Select up to 4 genres (This refers to music played in areas used by customers, and not, for example, in a restaurant's kitchen)

Select up to 4 genres

☐ Pop (1)

- ☐ Rock (2)
- ☐ Hip-Hop / Rap (3)
- ☐ Dance / Electronic (4)
- ☐ Latin (5)
- ☐ R&B (6)
- ☐ Classical / Opera (7)
- ☐ Country (8)
- ☐ Jazz (9)
- ☐ Folk (10)
- ☐ Experimental (11)
- ☐ Other (please specify) (12) _____

Display this question:
If Is background music played at the place where you work? (This refers to music played in areas use... = Yes
Q 3.6 How is background music provided at the venue where you work? (This refers to music played in areas used by customers, and not, for example, in a restaurant's kitchen)

- ☐ Streaming services (e.g., Spotify, Deezer, Apple Music, etc.) (1)
- ☐ Licensed music providers (e.g., Soundtrack Your Brand, Mood Media, etc.) (2)
- ☐ Purchased music (CDs, digital downloads, etc.) (3)
- ☐ Radio (FM, AM or internet radio) or TV (4)
- ☐ Other (please specify) (5) _____

Display this question:
If Is background music played at the place where you work? (This refers to music played in areas use... = Yes
Q 3.7 Does the venue you work pay a license to play music for customers?

- o Yes (1)
- o No (2)
- o I'm not sure (21)

End of Block: Background music information

Start of Block: Live music events information
Q 4.1 Does the venue where you work organize live music events (e.g. live concerts, gigs, dj set)?

- o Yes (6)
- o No (7)

Skip To: End of Block If Does the venue where you work organize live music events (e.g. live concerts, gigs, dj set)? = No
Display this question:
If Does the venue where you work organize live music events (e.g. live concerts, gigs, dj set)? = Yes
Q 4.2 How frequently have live music performances taken place at the venue in the past 12 months?

- o Every day (1)

o 3-4 times a week (2)
o 1-2 times a week (3)
o 3-4 times a month (4)
o 1-2 times a month (5)
o 1-2 times per year (10)
o 3-4 times a year (6)
o Hardly ever (8)
o I don't know (9)

Display this question:
If Does the venue where you work organize live music events (e.g. live concerts, gigs, dj set)? = Yes

Q 4.3 What types of live music performances have taken place at your workplace in the past 12 months? (Please select up to three options)

☐ Solo artists (1)
☐ Bands (2)
☐ DJ sessions (3)
☐ Jam sessions (4)
☐ Classical ensembles (5)
☐ Other (please specify) (6) _____

Display this question:
If Does the venue where you work organize live music events (e.g. live concerts, gigs, dj set)? = Yes

Q 4.4 Which genres of music have been played live at the venue where you work in the past 12 months? (Please select up to 4 genres)

☐ Pop (1)
☐ Rock (2)
☐ Hip-Hop / Rap (3)
☐ Dance / Electronic (4)
☐ Latin (5)
☐ R&B (6)
☐ Classical / Opera (7)
☐ Country (8)
☐ Jazz (9)
☐ Folk (10)
☐ Experimental (11)
☐ Other (please specify) (12) _____

Display this question:
If Does the venue where you work organize live music events (e.g. live concerts, gigs, dj set)? = Yes
Q 4.5 What is the typical capacity of the venue during live music performances?

o Up to 50 people (6)
o 51–100 people (7)
o 101–150 people (8)

o 151–200 people (9)
o Over 200 people (please specify) (10)
_____

Display this question:
If Does the venue where you work organize live music events (e.g. live concerts, gigs, dj set)? = Yes
Q 4.6 Over the past year, has the number of live music performances at your workplace:
o Increased (1)
o Decreased (2)
o Stayed the same (3)
o I do not know (4)

Display this question:
If Does the venue where you work organize live music events (e.g. live concerts, gigs, dj set)? = Yes
And Over the past year, has the number of live music performances at your workplace: = Decreased

Q 4.7 By how much has the number of live music performances at your workplace decreased over the past year?
o Decreased by more than 50% (1)
o Decreased by 25% to 50% (4)
o Decreased by 0% to 25% (5)
o I do not know (9)

Display this question:
If Does the venue where you work organize live music events (e.g. live concerts, gigs, dj set)? = Yes
And Over the past year, has the number of live music performances at your workplace: = Increased
Q 4.8 By how much has the number of live music performances at your workplace increased over the past year?
o Increased by 0% to 25% (11)
o Increased by 25% to 50% (12)
o Increased by more than 50% (13)
o I do not know (8)

Display this question:
If Does the venue where you work organize live music events (e.g. live concerts, gigs, dj set)? = Yes
And Over the past year, has the number of live music performances at your workplace: = Decreased
Q 4.9 If your workplace provides fewer live music performances now compared to a year ago, please rank the following reasons in order of importance (1 = most important, 6 = least important): (Drag the choices in the right order)
_____ Budget constraints / Higher costs (1)
_____ Lower customer demand (2)
_____ Noise complaints (3)
_____ Legal restrictions (4)
_____ Staffing or logistical challenges (5)
_____ Changes in business focus or management priorities (6)

_____ other (specify) (7)

Display this question:
If Does the venue where you work organize live music events (e.g. live concerts, gigs, dj set)? = Yes
Q 4.10 How are live music events at your workplace typically financed?
o Paid by the guests (ticket/entry) (3)
o Free for the guests (1)
o Donations from the guests (2)
o Paid by the guests (subscription) (4)
o Other (specify) (5) _____
o I do not know (6)

Display this question:
If Does the venue where you work organize live music events (e.g. live concerts, gigs, dj set)? = Yes
And How are live music events at your workplace typically financed? = Paid by the guests (ticket/entry)
Q 4.11 What are the minimum and maximum ticket prices for live performances at your workplace?
o Minimum price (euro): (1) _____
o Maximum price (euro): (2) _____

Display this question:
If Does the venue where you work organize live music events (e.g. live concerts, gigs, dj set)? = Yes
Q 4.12 How does revenue at your workplace typically change on nights with live music compared to nights without live music? (Please select one)
o Increases significantly (1)
o Increases slightly (2)
o No change (3)
o Decreases slightly (4)
o Decreases significantly (5)
o Not sure (6)

Display this question:
If Does the venue where you work organize live music events (e.g. live concerts, gigs, dj set)? = Yes
Q 4.13 What is the main motivation at your workplace for organizing live music events?
o Increasing revenue (1)
o Enhancing customer experience (2)
o Customer retention (3)
o Attracting new customers (4)
o Marketing and promotion (5)
o Brand differentiation (6)
o Supporting local talent (7)
o Community engagement (8)
o Utilizing venue space (9)

o Other (specify) (10) _____

Display this question:
If Does the venue where you work organize live music events (e.g. live concerts, gigs, dj set)? = Yes

Q 4.14 What are the main sources of revenue from live music events at your workplace? (Select up to three sources)

- ☐ Ticket sales (1)
- ☐ Increased food and beverage sales (2)
- ☐ Sponsorships (3)
- ☐ Merchandise sales (4)
- ☐ Donations (5)
- ☐ Other (specify) (6) _____

Display this question:
If Does the venue where you work organize live music events (e.g. live concerts, gigs, dj set)? = Yes

Q 4.15 What are the biggest challenges of hosting live music at your workplace? (Select all that apply)

- ☐ High artist fees (1)
- ☐ High costs beside artists fees (2)
- ☐ Unpredictable revenue (3)
- ☐ Licensing and regulation costs (4)
- ☐ Noise complaints from neighbours or authorities (5)
- ☐ Difficulty attracting audiences (6)
- ☐ Equipment and venue space limitations (7)
- ☐ Other (please specify) (8) _____

End of Block: Live music events information