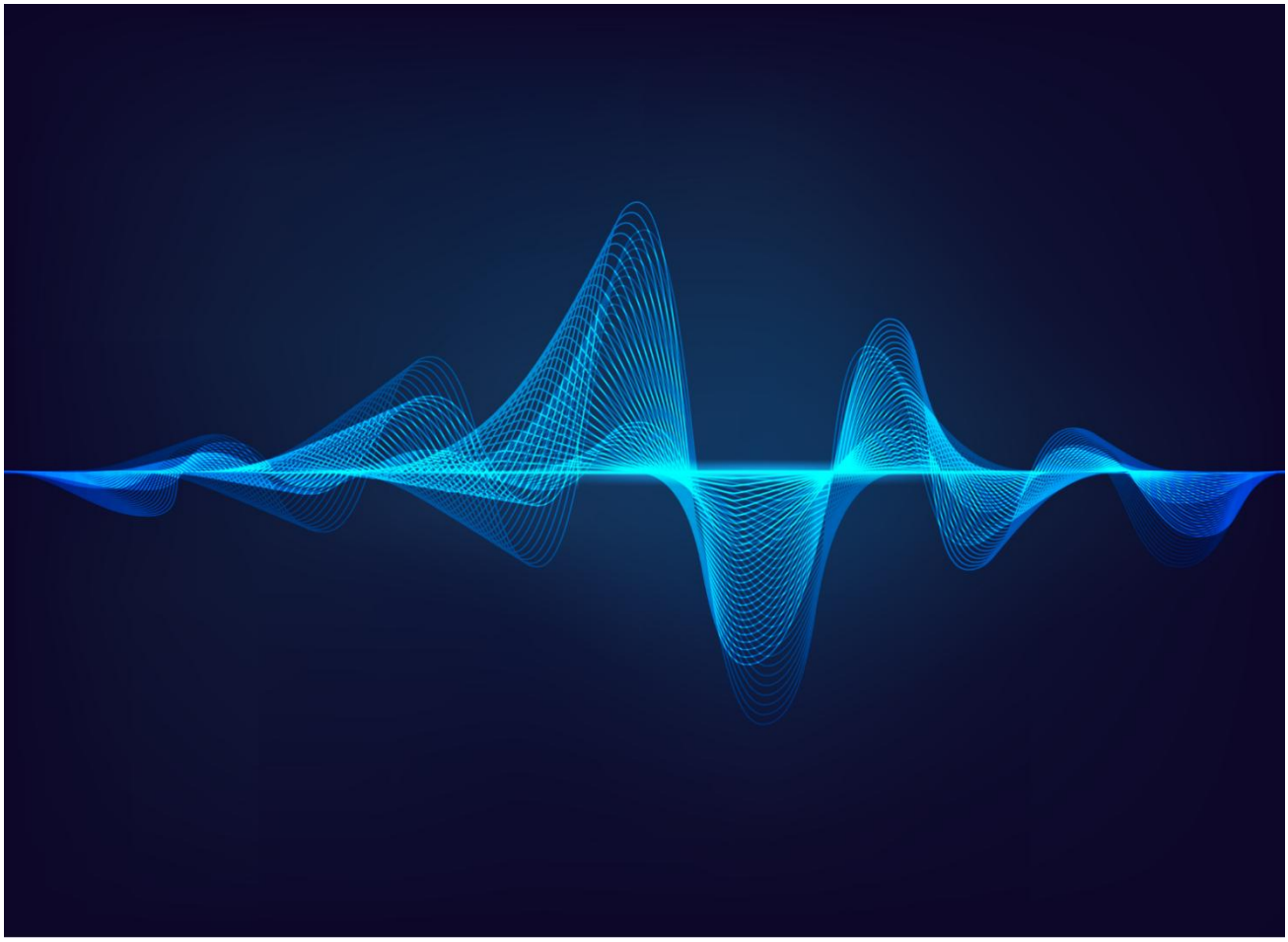

D3.2 – Report on Music, Society and Citizenship in Europe

OpenMusE

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

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Executive Summary

This deliverable reports new population-representative data on music, society, and citizenship in Europe, and develops analytical frameworks and policy recommendations on the basis of these data.

- Section 1 revisits the project's research aims regarding music, society, and citizenship.
- Section 2 describes findings of a multinational survey, supplemented with secondary data analysis.
- Section 3 discusses the findings, focusing on:
    - Section 3.1: The broad extra-economic value of music
    - Section 3.2: Music as a social-ecological system
    - Section 3.3: Music and music data as objects of policy

A **data dashboard** is at: https://www.openmuse.eu/cultural-access-and-participation/

Data and documentation are at: https://github.com/openmusiceurope/T3.2_cultural_access_CAWI

The survey confirms music's role as a social and cultural resource across Europe, while revealing systematic inequalities in access, creation, and recognition. Musical participation is nearly universal, but strongly stratified by age, social status, and education — patterns that persist across areas of musical life from education to professional musicianship. Life stage emerges as the single strongest predictor of musical engagement: young adults (16–29) lead in discovery, creation, and attendance, while participation contracts significantly from mid-life onward.

Below are our key findings in topical clusters, each of which is accompanied by a factsheet:

Key findings: Music education and information (see also https://www.openmuse.eu/music-edu-info/)

- On **music education**, support for free music education is very high stable across demographics (64–69% by country) – however, current school-based provision tapers sharply after compulsory schooling (upper secondary participation 19–38% across countries).
- On **music discovery**, radio and streaming together dominate as discovery channels, with a pronounced generational divide. Streaming and social media lead for under-30s; for those between 30-39, streaming and radio are tied; and radio takes the lead among those over 40.

Key findings: Music, society, and politics (see also https://www.openmuse.eu/music-society-politics)

- On **music in everyday life**, music is an important part of family life for 55% and community life for 45% of respondents; around half share new music with others, and a third report meeting close friends through music.
- On **the right to music**, 78% endorse the right to musical expression, and 78% support universal access to music learning — consistent with Article 27 of the UDHR.
- On **music policy**, broadly cross-ideological public support for generous cultural funding (51–57% by country) coexists with a much sharper left-right gradient on "diversity, equity, and inclusion"-oriented criteria. Redistributive measures are broadly acceptable: 50% of respondents support requiring streaming platforms to invest in local artists and 51% support requiring large ticketing platforms to support local live music scenes, with far smaller percentages voicing explicit opposition.

Key findings: Participation and monetisation (see also https://www.openmuse.eu/valuation/)

- On **participation in live music**, engagement is very high but only partially monetised: for details here, please see the extensive analysis on valuation of live music in OpenMusE D1.5.

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- On **non-commercial musical creation**, 29% of respondents played an instrument or sang in the past 12 months, with 80% of self-identifying musicians categorising themselves as amateur, 15% as semi-professional, and 5% as professional. Younger Europeans report more musical activity – as do those of higher socioeconomic status: individuals who struggle to pay bills "most of the time" participate substantially less across all musical forms, as do those who subjectively identify as low-status.
- On **commercial musical creation**, portfolio labour and intermittent income dominate; only 12% report any musical income, and a significant identity–income mismatch is documented. Public performance is rare among self-declared musicians: only 7% play for an audience multiple times per day or daily.
- On **fair working conditions**, 75% believe that artists should have the right to decent working conditions and fair pay for their work – with very little difference between respondents who lean to the political left or right. Over half believe that policymakers should help ensure artists can earn a minimum income, even when they're self-employed – and 58% believe that self-employed artists should have access to social protection (unemployment, health insurance, etc.). These numbers also vary surprisingly little between left- and right-leaning respondents.

Key findings: Wellbeing and sustainability (see also https://www.openmuse.eu/sustainability/)

- On **health and well-being**, music is widely used for emotional self-regulation; amateur musicians report the strongest affective attachment, while professional musicians more frequently extend into therapeutic portfolio work.
- Finally, on **sustainable development**, 49% support tying cultural funding to environmental sustainability. Some practices are already widespread: e.g., 58% of live event attendees observe recycling infrastructure. However, significant communication gaps exist between sector practice and audience expectations.

Actionability and policy relevance

The OpenMusE Consortium draws three clusters of actionable implications from these findings.

- **Data infrastructure**: the survey instruments and datasets reported here should be integrated into the EU Cultural Data Hub agenda. In the best case, the Cultural Hub initiative should entail a commitment to regular (annual or biennial) cross-EU surveying on cultural access and participation. The question batteries fielded in this survey are ready for uptake, and many could be easily adapted to cover other cultural and creative sectors and industries as well. The question batteries on live music attendance and expenditure are particularly high-impact, as they are designed to feed an open-access valuation model that fuses survey data with secondary ticketing data and economic structural data to estimate the full economic footprint of life music on a national level (see also D1.5).
- **Cultural policy**: the strong and cross-partisan public mandate for universal music education, freedom of artistic expression, artist social protection, and platform transparency and local reinvestment (majority support in each case, with negligible outright opposition) provides a direct legitimacy base for a more assertive cultural policy than has been pursued to date. Public support for environmental, social, and labour conditions as cultural funding criteria is also comparatively high – however, as expected, it is polarised along left-right lines. Addressing these intersections on a national or local rather than supranational level may serve to reduce polarisation between both constituencies and Member States where cultural policy is concerned.
- **Valuation and measurement**: the hybrid, partially monetised nature of Europe's musical economy requires valuation frameworks that account for 1) the economic value created by music across

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numerous adjacent sectors, and 2) the extra-economic value created by music across social and cultural life in holistic perspective. These survey data contribute to both dimensions of valuation. On an economic level, the integration of the survey microdata on live music expenditure with national accounts and CMO data, demonstrated in D1.5, provides a replicable methodology for estimating live music's total contribution to GDP, employment, and social value. Equally important is to formalise the (quantitative) assessment of music's extra-economic value, as validated by the survey sections on music and social life (2.3) and music, society, and politics (2.4). The OpenMusE Consortium strongly recommends the inclusion of both the survey's economic and extra-economic findings in the forthcoming 2027 *Report on the State of Culture in Europe* (cf. Culture Compass, COM(2025) 785 final).

The deliverable concludes with notes on how its content will be exploited in the final project activities and directions for future research and innovation[1].

Above all else, our data demonstrates that **music is a public good.** Strong and politically broad public endorsements of music education, freedom of expression, communal music-making, robust cultural funding, artist social protection, and platform transparency are documented across all five countries. As a means of synthesising these patterns, the data substantiate a *social-ecological systems framework (SESF)* perspective on music ecosystems. The SESF analyses music ecosystems as complex, relational, and subject to active multilevel governance. The **governance** element is crucial here: market developments over the lifespan of the OpenMusE project confirm that if democratic institutions do not take the lead in governing music infrastructures, then private-sector actors invested in monopolising and enclosing music will step in aggressively to do so. The entry of generative artificial intelligence (genAI) into cultural and creative value chains and ecosystems sharpens this risk. Our survey respondents – and the populations they represent – unambiguously call for a music sector *governed by local stakeholders and the people, in the interest of people and the planet*. It remains for policymakers on the EU, national, and local levels to answer this call.

[1] The D3.2 description in the amended Grant Agreement states that "As WP4 focuses on software tool development, this analysis also addresses selected policy-relevant topics in music technology and innovation". However, the Grant Agreement was subsequently further amended to add a deliverable to WP4, D4.5 "Open Policy Analysis on Innovation in Music", which takes over this aim. Accordingly: D3.2 still addresses some topics in music technology and innovation, but only in the context of its primary topic of music, society, and citizenship.

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Introduction

OpenMusE WP3 borrows its objectives from the pillar on "music, society, and citizenship" in the *Feasibility Study for the Establishment of a European Music Observatory* (Directorate-General for Education, Youth, Sport and Culture et al., 2020; henceforth *Feasibility Study*). According to the *Study*, this pillar should explore:

> *"the way audiences choose, and are able, to experience music in its full range of cultural contexts and through which means they access and experience music. This focuses on all aspects of musical interaction and audience engagement. It should also provide a framework to map and measure all actors and initiatives contributing to societal evolutions in the music sector at large, as well as not-for-profit operators in Europe" (p. 116).*

Prior deliverables in WP3 set the groundwork to fulfil these objectives:

- D3.1 presents a policy analysis, scientific literature review, and data availability assessment on the "the way audiences choose, and are able, to experience music in its full range of cultural contexts".
- D3.3 applies the "live music census" method to explore one crucial manifestation of "musical interaction and audience engagement": urban live music scenes.
- D3.4 proposes a "framework to map and measure all actors and initiatives contributing to societal evolutions in the music sector at large", and demonstrates its practicality through application to the live music census data.

This deliverable builds on this groundwork:

- Section 2 presents the findings of a cross-national representative survey which was designed to **fill key data gaps identified in D3.1**, and which was harmonised with open data on cultural access and participation (Eurobarometer 79.2) as well as with sections of the D3.2 live music census. The findings address research questions identified in D3.1 (Section 1.1.3) on:
    - Music education
    - Music discovery and information behaviour
    - Music and social life
    - Music, society, and politics
    - Music and human rights
    - Musical creation – non-commercial and commercial
    - Participation in musical life
    - Music, health, and well-being
    - Music and sustainable development
- Section 3 **interprets these findings in the indicator framework proposed in D3.4**.

In addition to primary survey data, the deliverable draws on open-access secondary data where possible and appropriate, and incorporates references to key policy literature, with a focus on developments since 2023 (as D3.1 already covered prior literature).

Overview of findings

The cross-national survey of N≈6,000 respondents in in Germany, Spain, France, Italy, and Poland provides the first recent comparable and population-level portrait of musical life among the majority of European adults. Three overarching patterns emerge. **First, musical participation is near-universal but structurally unequal.** Virtually all Europeans engage with music in some form; however, the depth, diversity, and creative dimension

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of that engagement is strongly shaped by life stage, socioeconomic status, and education. **Second, music is a hybrid economic and extra-economic practice.** One the one hand, a large share of musical engagement — listening, live attendance, creation — takes place outside formal or monetised channels; in parallel, the economic footprint of music extends well beyond ticket revenues and streaming subscriptions to ancillary spending and non-commercial creative investment. **Third, music is a public good.** Strong and politically broad public endorsement of music education, freedom of expression, cultural funding, artist social protection, and platform transparency is documented across all five countries. As a means of synthesising these patterns, the data empirically substantiate the *social-ecological systems framework (SESF)* developed in D3.1 and D3.4, demonstrating that music ecosystems are complex, relational, and subject to multilevel governance.

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1 Background

1.1 Research aims and questions

D3.1 *Music, Society, and Citizenship: Methods and Indicators* developed research questions on the broad topic of **music, society, and citizenship**, based on three touchpoints:

- The *Feasibility Study on the Establishment of a European Music Observatory* (2020);
- The *European Statistical System Network on Culture Final Report* (Bína et al., 2014; henceforth *ESSnet-Culture Final Report*); and
- The Council Resolution on the EU Work Plan for Culture 2023–2026 (2022/C 466/01) (European Commission, 2022).

Other inputs for the WP3 research questions included the AB MUSIC Working Group Report (2016); Communication on a New European Agenda for Culture (European Commission, 2018); Report from the Commission on the Work Plan for Culture 2019-2022 (2022); national reports issued by the Compendium on Cultural Policies and Trends (https://www.culturalpolicies.net/); and workshops held with cultural policy and statistics stakeholders, most notably the Slovak Ministry of Culture and Institute for Cultural Policy.

Specifically, D3.1 began with the following research questions on:

- **Music education**: What are the roles and comparative importance of formal and informal education in musical engagement in Europe?
- **Music discovery and information behaviour**: What are the roles and comparative importance of different channels and sources in contemporary music information repertoires in Europe? What is the role of music in broader information repertoires?
- **Music and social life**: How do offline and online social network dynamics shape musical life in Europe and vice versa, for the general population on the one hand and music professionals on the other? What role do music and musical activities play in socialisation?
- **Music, society, and politics**: How does music contribute to the public good in Europe? Can initiatives and policy interventions that target music produce positive outcomes in policy-relevant areas, such as: Social integration? Economic and social cohesion? Civic engagement?
- **Music and human rights**: What challenges endanger European musicians' freedom of expression? What progress have EU member states made toward recognizing the "right to culture"? What initiatives have been taken to protect and promote minority music in Europe?
- **Non-commercial musical creation**: What is the extent of musical activity in Europe among the population as a whole? Do the above factors and/or sociodemographic factors play a role? What is the economic impact of amateur music making, e.g., via instrument sales, lessons, etc.?
- **Commercial musical creation**: What is the extent of participation in the informal musical economy in Europe among the population as a whole? What is the spectrum of activity between "amateur" and "professional" musicianship? How do musicians move between these two poles?
- **Participation in musical life**: How can the consumption of musical goods and services in Europe be accurately assessed, in view of sectoral characteristics such as high informality and the prevalence of zero-price uses? How can improved consumer-side data support improved price-setting and asset valuation for business activities and policymaking (cf. Open Music Europe D1.1)?

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- **Music, health, and well-being**: How is music used in physical and psychological health care systems in Europe? How can the impacts be assessed? How can the impact of music on general well-being be assessed, on the level of: Individuals? Communities?
- **Music and sustainable development**: How can the environmental, social and governance sustainability of the music industry be measured? Is there a connection between musical participation and pro-environmental attitudes and behaviours? Can musicians contribute to the development of a greener culture?

These research questions guided our review of scientific literature (D3.1 Section 2), as well as our initial proposed framework for the assessment of data availability and gaps (D3.1 Section 3). Our cross-national surveys were, in turn, developed largely to fill these data gaps. After updating and filling some gaps in the D3.1 analysis of policy literature and scientific literature, this deliverable summarises the survey findings on a descriptive level. Each sub-section begins by revisiting the relevant research questions.

1.2 Policy literature update

Two emerging but ambiguously-defined priorities in the policy documents reviewed in D3.1 were “music ecosystems” and “music and sustainability”. The Work Plan for Culture 2023–2026, for instance, makes reference to both concepts without establishing a precise definition or scope for either. In the years 2023 through 2025, significant effort has been dedicated in the scientific and policy communities toward defining and operationalising both “cultural / music ecosystems” and “culture / music and sustainability”. Section 1.2 fills a gap in D3.1 (Section 2.3.10) by summarising milestones on the policy side of this emerging discourse, while Section 1.3 does the same on the scientific side.

1.2.1 Creative Europe Programme Greening Strategy (2023)

The Creative Europe Programme Greening Strategy (European Commission, 2023a) explicitly defines the concept of “sustainability” within the context of the study. Sustainability is described as the sectors' efforts to adopt more environmentally sustainable practices to minimise their environmental and climate change impacts (ibid., p. 7). This aligns with the European Green Deal objectives and international commitments on tackling climate change. The aim is to prevent the depletion of natural or physical resources and move towards carbon-neutral operations in the future. The report does not explicitly define the concept of cultural or music ecosystem. However, the programme makes mention of some green projects in support of the European Music Ecosystem, such as “Musicaire”, “Perform Europe” and “Culture Moves Europe” (p. 12). The Creative Europe Programme Greening Strategy emphasises the role of culture and media in inspiring people and raising awareness about climate change and biodiversity preservation (ibid., p. 9), which could be considered part of a cultural ecosystem’s function. However, this is more about the impact and potential of the broader cultural and creative sectors (CCS) rather than a definition of the ecosystem itself.

The study does address aspects of environmental sustainability within the cultural ecosystems, particularly through the lens of the Creative Europe Programme's greening efforts. It emphasises the importance of reducing the environmental impact of cultural and creative sectors (CCS) by aligning with the European Green Deal objectives. This includes promoting sustainability and fighting against climate change as part of the supported projects' objectives (ibid., p. 31). However, the report does not explicitly address the social and governance aspects of ESG sustainability in cultural ecosystems. The focus is primarily on environmental

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sustainability, with an emphasis on reducing greenhouse gas emissions and promoting green practices within the CCS (ibid., p. 8-9).

Regarding specific measures, the report suggests adjusting reporting requirements and developing feasible indicators to enhance accountability and measure progress in greening efforts (ibid, p. 31). This includes recommendations for improving the knowledge base on the state of the green transition within the Creative Europe Programme. However, these measures remain relatively general and do not delve into detailed, specific actions for achieving ESG sustainability. The Creative Europe Programme also references the European Green Deal as a guiding framework for its sustainability objectives, aiming to contribute to the Union's target of allocating 30% of its budget to climate objectives by 2030 and achieving net-zero emissions by 2050 (ibid., p. 9). However, it does not explicitly mention other established frameworks such as the Sustainable Development Goals (SDGs), the European Sustainability Reporting Standards (ESRS), or the Corporate Sustainability Reporting Directive (CSRD).

1.2.2 European Union Structured Dialogue – Voices of Culture Brainstorming Report on CCSIs Driving Green Transition and Facing the Energy Crisis (2023)

The Voices of Culture Brainstorming Report on *CCSIs Driving Green Transition and Facing the Energy Crisis* (European Union, 2023) emphasises the role of culture in promoting environmental sustainability. The source does not explicitly define the concepts of cultural or music ecosystems, or sustainability. Instead, it focuses on the roles and potential of cultural and creative sectors in fostering sustainability rather than providing formal definitions: "CCSI have the potential, if adequately supported, to engage and inspire people to reimagine a viable, low carbon, just and sustainable future" (ibid., p. 10).

However, the report discusses several innovative concepts related to sustainability, particularly focusing on economic models that challenge the traditional paradigm of perpetual economic growth. Among these, Doughnut Economics (Raworth, 2017) and de-growth are prominently featured. Doughnut Economics is a model that seeks to balance essential human needs and planetary boundaries, promoting a sustainable and equitable economic system. It emphasises the importance of meeting the needs of all people within the means of the planet, thus ensuring both human and planetary wellbeing. De-growth, on the other hand, is presented as a critical response to the conventional growth-centric economic model. It advocates for a reduction in production and consumption, aiming for a slower economic pace that prioritises ecological sustainability and social equity. These concepts are part of a broader discourse on reimagining economic systems to better align with sustainability goals. In the context of this report, they are celebrated for their potential to inspire new narratives and methodologies that integrate creative crafts and diverse industries in defining sustainable production practices.

Furthermore, the report highlights the promotion of sustainable digital practices and the integration of sustainable design principles in the construction and renovation of cultural facilities. This includes the use of environmentally friendly materials, optimising energy use through efficient building design, and considering the lifecycle impact of the built environment (European Union 2023, p. 52). The dissemination techniques used for all projects and programmes are recommended to be aligned with the SDGs, to ensure that data and platforms evolve in sustainable ways using criteria developed specifically for this purpose (ibid., p. 44). However, the document does not elaborate further on specific SDGs or how each goal might be addressed. The document also highlights the complexities of measuring and reporting carbon footprints, calling for a

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unified approach to ensure effective evaluation and support mechanisms to accelerate climate emission reduction.

Regarding the music industry, while the report does not make targeted reference to this sector, it recommends promoting the use of music venues as interactive shared spaces for raising awareness, understanding, and encouraging dialogue. This implies that music venues are recognised as important cultural spaces that can contribute to broader societal goals, such as fostering community engagement and promoting sustainability. However, the document does not provide specific strategies or detailed discussions focused solely on music venues, instead treating them as part of a broader category of cultural spaces (along with museums, theatre venues, libraries, galleries, exhibition spaces, public spaces, and stadiums) that can be leveraged for positive social impact.

1.2.3 Dialogue in Music: Addressing the Challenges of Climate Change

In 2023, the *Dialogue in Music: Addressing the Challenges of Climate Change* (European Commission, 2023b) was launched in the context of Music Moves Europe (MME). MME is the framework for the European Commission's initiatives and actions in support of the European music sector. With Music Moves Europe, the European Commission wants to build on and strengthen the sector's strong assets: creativity, diversity and competitiveness. The European Commission chose a consortium to implement the 4 years action (Music Moves Europe - Strengthening the dialogue on music). It was led by Eurosonic Noorderslag ESNS (the Netherlands), together with ARTmania (Romania), Linecheck (Italy), MaMa (France), Reeperbahn Festival (Germany) and Tallinn Music Week (Estonia).

The consortium organised a series of Music Moves Europe dialogue meetings at major music conferences in Europe, to strengthen the exchange on EU related matters (policies impacting on music, funding opportunities, etc.) within the music sector and with its professionals.

Key findings from Dialogue on Music #3, launched at Eurosonic Noorderslag (ESNS) in January 2024.

1) Encouraging Further Exchange and Sharing Responsibilities: the section of the Dialogue on Music #3 emphasizes the importance of sharing responsibilities and setting expectations within the music ecosystem in Europe to enhance environmental sustainability. Key points from this section include:
    - Establishing a framework to map the current state of environmental sustainability in the European music ecosystem.
    - Identifying focus areas for future development based on capability, opportunity, and motivation considerations.
    - Setting a sustainability baseline for the European music sector through this research effort.
2) Improving Access to Environmental Sustainability Information: To make information on environmental sustainability more accessible within the music industry, the section suggests:
    - Enhancing knowledge sharing and inspiration among industry stakeholders.
    - Compiling an overview of existing projects, funded research, tools, and best practices in the field.
    - Addressing the challenge of language barriers by translating existing information into different languages.

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- Leveraging existing networks for the distribution of knowledge and resources to promote sustainability practices.

3) How do we move from knowledge to action?: This section of the Dialogue on Music #3 emphasizes moving from knowledge to action in promoting environmental sustainability in the music sector through initiatives like Keychange, which serves as a model for setting standards and providing support to achieve them. This section also proposes establishing a support program to facilitate discussions, offer training, and provide access to tools and solutions.

Addressing environmental sustainability encompasses more than just reducing carbon emissions; it advocates for a comprehensive approach to creating diverse opportunities for promoting sustainable practices.

1.2.4 Music Moves Europe *Report on The European Music Ecosystem* (2024)

The MME *Study on the European Music Ecosystem* (European Commission & Music Moves Europe 2024) provides a detailed and structured definition of the "music ecosystem," introducing it as a network of interdependent actors, environments, infrastructures, and value systems engaged in the creation, distribution, and experience of music: where boundaries between siloes have become more diffuse or disappeared completely, and value is no longer only created in linear and centralised value chains, but in increasingly complex, decentralised and open value networks (ibid, p.5). This ecosystem includes not only artists and audiences but also institutions, technologies, spaces, and policy frameworks that shape how music is produced and accessed across Europe (ibid.). The study outlines three definitional variants—short, long, and expanded—and situates them within current EU cultural policy contexts. Central to the ecosystem model is a normative orientation toward openness, fairness, democratic participation, and sustainability as guiding principles (ibid., p. 16). The framework moves beyond linear or market-based views of value creation and highlights the need to understand the music sector as a dynamic, relational system.

The report also articulates a clear understanding of sustainability, drawing on concepts such as Kate Raworth's Doughnut Economics to frame sustainability as the balancing act between respecting planetary boundaries and ensuring equitable social foundations (ibid., p. 14). Sustainability is described as both a value and a long-term policy objective that must be embedded across governance, funding, education, infrastructure, and digital transformation within the ecosystem. This systemic approach is accompanied by a call to shift from ego-centric to eco-centric thinking, reflecting a broader transformation in how value, responsibility, and interdependence are conceptualized in the sector (ibid., pp. 11–13).

The document addresses the environmental, social, and governance (ESG) dimensions of sustainability in considerable depth. Environmentally, it outlines key challenges such as emissions from touring and streaming infrastructure while also highlighting the symbolic and discursive power of music to support climate action and ecological awareness (ibid., pp. 6–7). Although no technical prescriptions are given, the study references ongoing initiatives—such as low-emission touring models—and calls for a shift toward long-term investment in sustainable infrastructures (ibid., p. 23). The social dimension is addressed through an analysis of existing structural inequalities in the music ecosystem, including issues of precarity, unequal representation, and access to opportunities. The study emphasizes the importance of inclusivity and intersectionality, referencing existing initiatives such as Keychange that aim to redress gender imbalance (ibid., p. 7). Concerns around mental health, regional disparities, and working conditions are also included as part of a broader effort to situate social sustainability at the heart of music ecosystem policy.

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In relation to governance, the report critiques the fragmentation of music policy across Europe and calls for more coherent, multilevel governance that reflects the interconnected nature of the ecosystem (ibid., pp. 21–22). It advocates for subsidiarity, long-term cooperation, and participatory decision-making as core governance values. Specific challenges such as platform monopolies and a lack of coordinated strategy for digital music markets are flagged as governance risks that require policy innovation and cross-sector collaboration.

The study includes a series of concrete recommendations related to ecosystem sustainability. These include reforming public funding frameworks to support value networks instead of individual projects, developing a shared conceptual language across sectors, integrating sustainability indicators into cultural funding evaluation, and improving horizontal and vertical coordination between EU, national, and local actors (ibid., pp. 22–23). The report situates these proposals within the framework of the United Nations Sustainable Development Goals (SDGs), with explicit reference to goals related to gender equality (SDG 5), decent work (SDG 8), innovation (SDG 9), reduced inequalities (SDG 10), and climate action (SDG 13). However, it does not reference the European Sustainability Reporting Standards (ESRS) or the Corporate Sustainability Reporting Directive (CSRD).

1.2.5 The Competitiveness Compass for the EU and Culture Compass for Europe

The Competitiveness Compass (COM(2025) 30 final) and Cultural Compass (COM(2025) 785 final) establish the cornerstones of EU-level cultural policymaking in the second half of the 2020s and beyond. The Competitiveness Compass identifies policy priorities and decision-making procedures to position Europe as "the place where tomorrow's technologies, services, and clean products are invented, manufactured and marketed, as we stay the course to climate neutrality" (p. 2), while the Cultural Compass articulates "a strategic vision in which Europe stands up for culture and culture stands for Europe" (p. 2). The latter entails four directions: 1) strengthening European values and cultural rights; 2) empowering artists, cultural professionals, and populations; 3) leverages culture to become more competitive, resilient, and cohesive; and 4) champions international cultural relations and partnerships. Both documents describe market sectors such as culture / music as "ecosystems" without specifying particular ecosystem definitions or models, and thus do not represent a significant departure in this regard from prior policy touchpoints. At the time of writing this deliverable, the Music Moves Europe *Report on The European Music Ecosystem* (2024) is thus the most theoretically advanced treatment of music ecosystems in the policy corpus.

1.3 Scientific literature update

While Section 1.2 traces the evolution of "cultural (and music) ecosystems" and "sustainability" in policy discourse, this section synthesises parallel developments in the scientific literature. Following D3.1's identification of sustainability as an emerging but under-researched priority, a substantial body of empirical and conceptual work has emerged since 2020. This scientific literature update focuses specifically on music and sustainability, examining environmental, social, and governance dimensions within music ecosystems, and identifying key themes, empirical findings, policy implications, and research gaps relevant to the OpenMusE project's objectives. The review is based on a systematic search of scientific databases (Scopus and Google Scholar) conducted in November 2025, covering publications from 2020 onwards. The search yielded 76 unique papers addressing music and sustainability across multiple domains: live music and touring, recorded

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formats and streaming, festivals and event management, creative practice and instruments, and cultural/activist responses. This section organises findings thematically to complement the policy frameworks discussed in Section 1.2 and to inform the empirical work presented in Section 2.

1.3.1 Key themes and research areas

Scientific research on music and sustainability has coalesced around five principal thematic clusters, each addressing distinct but interconnected aspects of environmental impact, resource use, and systemic change within music ecosystems.

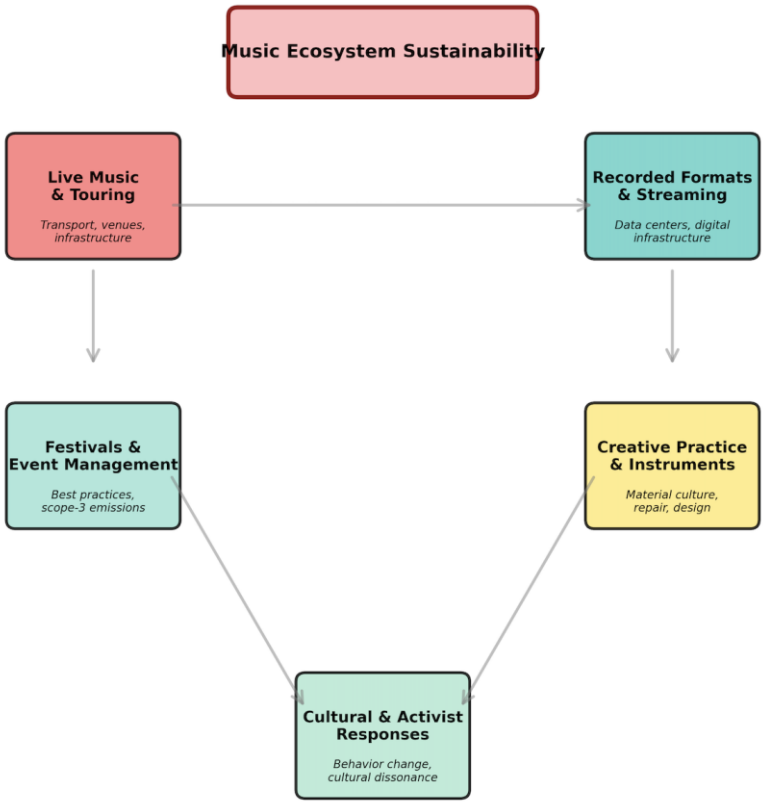

***Figure 1** – Key research themes identified in the scientific literature. Source: Source: SSSA, CHP, SINUS (2025).*

Live music and touring

The most extensively studied domain focuses on material infrastructures, touring logistics, and venue energy use as central sources of emissions and environmental impact (Larasti, 2019). Research employing a “live music ecology” framework captures the interdependence among venues, crews, audiences, and non-music actors (infrastructure providers, transport systems, energy suppliers) (Larasti, 2019; Summer, 2021). Studies consistently identify transport — both audience travel and artist/crew touring—and venue infrastructure (heating, cooling, lighting, sound systems) as the largest contributors to live music's carbon footprint (Larasti, 2019; Collins et al., 2025; Bossey, 2022). Recent work has examined specific interventions: renewable energy installations at festivals (Pujadas-Gispert et al., 2021), low-emission tour routing, modal shift strategies by encouraging public transport or active travel (Chirieleison et al. 2020), and the potential of regional touring circuits to reduce long-distance travel (Berhamovic, 2023; Alonso-Vazquez & Ballico, 2021). However,

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researchers note that structural dependencies (e.g., venue location, audience catchment areas, artist routing pressures) constrain the feasibility of rapid decarbonization (Larasti, 2019; Røyseng et al., 2024).

Recorded formats and streaming

Comparative lifecycle analyses challenge the assumption that digital music distribution automatically reduces environmental impact (Narayan & Srivastava, 2025; Kahl-Placek, 2022; Brennan et al., 2020). While physical media (vinyl, CD) entail manufacturing materials, transportation, and end-of-life disposal costs, digital streaming incurs emissions through data centers, network delivery infrastructure, and user devices (Narayan & Srivastava, 2025; Yoo, 2023; Wickham et al., 2021). Recent studies highlight the growing energy demands of cloud storage, content delivery networks (CDNs), and the embedded carbon in IT supply chains (Yoo, 2023; Akman, 2023). Platform-level research has begun to scrutinize corporate sustainability reporting by major streaming services, revealing variability in renewable energy procurement, data center efficiency, and transparency (Yoo, 2023; Wickham et al., 2021). Some artist-led initiatives now incorporate streaming footprints into release strategies, though standardized measurement protocols remain limited (Wickham et al., 2021). The literature emphasizes that the **environmental costs of music consumption have shifted rather than disappeared with digitalization**, necessitating renewed attention to digital infrastructures (Narayan & Srivastava, 2025; Brennan, 2021).

Festivals and event management

Practice-oriented studies examine energy, waste, and transport at major music festivals, developing scoring frameworks and strategic resource/capability inventories for sustainability management (Jones 2025; Collins et al., 2025; Ngau & Sivadasan, 2025). Systematic reviews of festival sustainability research identify seven key themes: environmental impact assessment, stakeholder engagement, policy implementation, green human resource management, lifecycle assessment protocols, certification systems, and audience behavior (Cernigliaro, 2025). These themes reflect the multi-dimensional nature of festival sustainability, encompassing operational practices, organizational culture, and stakeholder relationships. **Festivals function as 'living labs' for sustainability innovation** (Dijkstra et al., 2023), providing contexts where new practices can be tested, refined, and potentially scaled to other cultural contexts.

Assessments of festivals such as Glastonbury, Coachella, and Rainforest World Music Festival document active mitigation measures: on-site renewable energy generation, waste sorting and recycling programs, biodiesel use for generators, and eco-charging stations for attendees (Jones, 2025; Collins et al., 2025). Despite these interventions, persistent challenges remain around scope-3 emissions (attendee transport, supply chain impacts) and the tension between festival growth and environmental goals (Collins et al., 2025). Research on audience engagement suggests that onsite environmental communication and participatory initiatives (e.g., co-creation of sustainability practices) can foster pro-environmental behavior (Orefice, 2024), though effects vary by festival context and attendee demographics (Alonso-Vazquez & Ballico, 2021).

Creative practice, instruments, and new interfaces

An emerging strand of research explores sustainable instrument building, circuit bending, repair culture, and sound-art projects that foreground ecosystems, materials, and repurposing practices (Dorigatti & Masu, 2022). These studies situate music-making within broader discourses of material culture, craft, and ecological design, examining how musicians and makers negotiate tensions between sonic innovation, affordability, and environmental responsibility. **Ecomusicology and sound ecology scholarship provide frameworks for integrating environmental themes into music education, program design, and community practice** (Rickwood, 2021; Titon, 2021, Edwards and Konishi, 2023). A recent relevant project is *MEGA - Music Efforts*

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for Green Activism, conceived and launched in 2025 by the Sud Sonico Cultural Association based in Lecce (Puglia, Southern Italy), in collaboration with Musichelp (Sweden) and Ramdom (Italy). MEGA functions as a capacity-building and information platform that promotes the design and implementation of ecological-musical projects. The initiative aims to empower curators, project managers, artists, and non-profit cultural organisations in integrating music and sound with ecological thinking and as instruments of climate activism (Sud Sonico, 2025). Field-recording projects and sound-art installations are discussed as ways to reconnect audiences to place-based ecological knowledge, offering socio-ecological engagement pathways that complement technical mitigation strategies (Rickwood, 2021; Titon, 2021).

Cultural, institutional, and activist responses

Research documents musicians' **perspectives on climate change, revealing both recognition of urgency and cultural dissonance**: the gap between environmental values and the structural realities of music careers (touring obligations, promotional expectations, economic precarity) (Larasti, 2022; Røyseng 2024). Qualitative studies show varying willingness to change touring practices, influenced by career stage, genre norms, and access to alternative models (Røyseng 2024). Civil society initiatives — such as Green Music networks in Australia, the UK, and Europe — are examined as normative and practical levers for change, providing peer support, knowledge sharing, and collective advocacy (Rickwood, 2021; Røyseng 2024). Institutional responses are also emerging: case studies of music schools and conservatories developing carbon management plans exemplify operational pathways (heat decarbonization, scope-3 attention, curriculum integration) that can be scaled or adapted regionally (Berhamovic, 2023).

1.3.2 Major findings and developments since 2020

This section summarizes robust empirical findings published since 2020, emphasizing areas where evidence is strongest and highlighting contested or emerging claims.

Quantification of live music impacts

Multiple studies confirm that **transport (audience and touring travel) and touring infrastructure are large and hard-to-reduce emission sources for concerts and festivals**. For example, festival assessments report that audience travel can account for 40–80% of total event emissions, depending on venue location, public transport access, and attendee travel modes (Badiali & Johnson, 2020). Artist touring emissions vary widely based on tour routing, transport modes (air vs. ground), crew size, and equipment freight (A Greener Future, 2024). **Venue energy use**—particularly heating, cooling, and lighting—constitutes the second-largest source of emissions for live music, with older buildings and those lacking modern insulation presenting significant challenges (Dalgic and Dalgıç 2024). Case studies of venue retrofits (LED lighting, heat pumps, solar panels) demonstrate measurable reductions in operational emissions, though capital costs and building heritage constraints can limit uptake (ibid.).

Streaming and digital consumption: shifting, not eliminating, impacts

Lifecycle analyses and sector reviews show that environmental costs have shifted rather than disappeared with digital formats (Brennan, 2021). Emissions linked to digital consumption — data centers, network delivery, user devices, and IT supply chains — can be substantial, though precise quantification remains contested due to variability in data center efficiency, renewable energy procurement, and user behavior (streaming quality, device type, network infrastructure) (Marks, 2020).

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Comparative studies suggest that the environmental impact of streaming depends critically on listening intensity: high-volume streaming on energy-efficient devices over renewable-powered networks may have lower per-listen impacts than physical media, but low-volume streaming on inefficient devices can reverse this calculus (Brennan & Devine, 2020). The literature emphasizes the need for **platform-level transparency** and standardized measurement **to enable informed consumer and policy choices (**Marks, 2020; Brennan & Devine, 2020).

Festival sustainability: progress and persistent gaps

Festival-sector research documents active mitigation measures—renewables, waste sorting, eco-charging, biodiesel—but highlights persistent challenges around scope-3 emissions (attendee transport, supply chain impacts) (A Greener Future, 2024). Scoring frameworks developed for festival sustainability assessment identify **reputational benefits, stakeholder engagement, and human capital (staff expertise) as important enablers of best practice**, alongside financial and technical resources (Wickham et al., 2021). Audience engagement research suggests that participatory approaches (co-creation of sustainability practices, onsite community dynamics) can foster pro-environmental behavior, though effects are context-dependent and may not translate to post-festival behavior change (Orefice, 2024). The literature calls for longitudinal studies to assess the persistence and net effects of interventions (Ngau & Sivadasan, 2025).

Institutional carbon management and sectoral coordination

Case studies of music schools, conservatories, and orchestras developing carbon management plans exemplify emerging institutional responses (Eusterbrock, 2022). These plans typically address operational emissions (energy, heating, waste) and, increasingly, scope-3 emissions (touring, commuting, supply chains) (Berhamovic, 2023). Some **institutions integrate sustainability into curricula and artistic programming, exploring repertoire choices, touring models, and audience engagement strategies that align with environmental goals**. Sectoral coordination initiatives— such as the Music Moves Europe Dialogue on Climate Change and Green Music networks— are documented as mechanisms for knowledge sharing, capacity building, and collective advocacy (Rickwood, 2021; Røyseng, 2024). However, researchers note fragmentation across national contexts and the need for pan-European coordination of measurement standards, venue retrofitting programs, and touring corridors.

Cultural dissonance and behavioral change

Qualitative research documents cultural dissonance: the **tension between musicians' environmental values and the structural realities of music careers** (touring obligations, promotional expectations, economic precarity) (Røyseng, 2024). Studies show varying willingness to change touring practices, influenced by career stage (emerging vs. established artists), genre norms (classical vs. popular music), and access to alternative models (regional touring, virtual performances). The literature emphasises that **individual behavior change is insufficient without systemic change**: policy interventions, infrastructure investments, and industry-wide norms shifts are necessary to enable sustainable practices at scale (ibid.).

1.4 Empirical research methods

This deliverable is based on a **mixed-methods research design** combining policy and literature review, secondary data analysis, and primary quantitative data collection. The methodological approach was defined

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in Deliverable **D3.1 "*Music, Society, and Citizenship: Methods and Indicators*"** and implemented here to address the data gaps identified therein.

1.4.1 Survey design and data collection

The core empirical component of D3.2 is a **cross-national representative survey** conducted by **SINUS Markt- und Sozialforschung GmbH**. A number of internal and external experts were consulted during the survey design process. These were:

Internal consultations:

- Prof. Dr. Joost Poort (j.p.poort@uva.nl)
- Prof. Dr. Arianna Martinelli (arianna.martinelli@santannapisa.it)
- Dr. Emilia Cholewicka (echolewicka@swps.edu.pl)
- Dr. Luigi Cernigliaro (luigi.cernigliaro@santannapisa.it)
- Daniel Antal, CFA (daniel.antal@reprex.nl)
- Dr. Eszter Kabai (ekabai@artisjus.com)
- Tomas Miks, LLM (tomas.miks@soza.sk)
- Rosina Petrova, MSc (rosina_petrova@musicautor.org)

External consultations:

- European Commission – Directorate-General for Education, Sport, Youth, and Culture
- Project Officer Laura Kasnauskaite (Laura.KASNAUSKAITE@ec.europa.eu)
- Dr. Adrian DeBattista (adrian.p.debattista@gmail.com)
- Frank Kimenai, C.Phil (kimenai@eshcc.eur.nl)
- Study on the Discoverability of European Content: Martin Clarke (m.clarke@panteia.nl)
- CICERONE project: Prof. Dr. Andy Pratt (andy.pratt.1@city.ac.uk)
- Live Music Mapping Project: Dr. Patrycja Rozbicka (p.rozbicka@aston.ac.uk), Dr. Mathew Flynn (matf73@liverpool.ac.uk)

During the Grant Agreement amendment process, it was decided together with the non-WP3 survey data users ARTISJUS and SOZA to conduct two parallel harmonised surveys:

A **face-to-face (computer-assisted personal interviewing or CAPI) version** was run in Hungary and Slovakia, utilising a random stratified sample. Computer-assisted personal interviewing (CAPI) is still considered the "gold standard" for survey data collection: because the sample frame is known, sample error can be calculated and grounded claims can be made about population parameters and potential sources of bias. Population coverage is moreover total, including (at least in principle) underrepresented groups such as rural residents, older residents, and the digitally disconnected. Finally, some respondents benefit from interviewer assistance when long sequences of behavioural recall questions are needed. A key purpose of the Hungary and Slovakia survey was to generate input for valuation models that cross-check: 1) data on recorded music revenues collected by CMOs with audience-reported usage of recorded music, disaggregated by channel; 2) data on the public performance of recorded music collected by CMOs with audience-reported patronage of businesses that often play recorded music. It was decided that the expense of CAPI was warranted to provide ARTISJUS

and SOZA with data they were confident to use in such valuation models. All CAPI survey details are available in Annex 2.

An **online (computer-assisted web interviewing or CAWI) version** was run in Germany, Spain, France, Italy, and Poland, sourced from a major online access panel, with population-representative quotas used to ensure the recruited samples mirrored the demographic structures of the target populations. Computer-assisted web interviews (CAWI) have historically been viewed as yielding lower-quality data than personal interviews, and on the matter of representativity it does feature drawbacks. Access panels are pools of individuals who have consented to be invited to participate in surveys, usually for a small financial incentive. Access participants are thus by definition self-selecting to participate in surveys, introducing bias (though it must be remembered that face-to-face survey respondents also must "self-select" to participate once their door has been knocked). The use of quota variables is based on the non-falsifiable assumption that attitudes and behaviours are consistent across both respondents and non-respondents within each category – e.g., that well-educated middle-aged women or poorly-educated elderly men *within* the access panel and the sample think and act similarly to those *outside* it. Moreover, coverage is of the online population rather than the total population, meaning it skews young, urban, and educated. Finally, self-completion questionnaires must aim for lower complexity than interviewer-assisted questionnaires. This last point was seen as minor, as the primary purpose of the five-country survey was to gather a broad spectrum of data on all meaningful aspects of musical attitudes and behaviours, rather than in-depth data on one aspect as in Hungary and Slovakia (e.g., recorded music usage per channel). All CAWI survey details are available in Annex 1.

The decision was taken to accept the representativity tradeoffs of the CAWI mode on the several grounds. Most immediately: CAPI fieldwork is significantly more expensive than CAWI fieldwork (CAPI in HU: ca. €30k; CAPI in SK: ca. €50k; CAWI: ca. €4k per country). Within the allocated budget, the CAPI survey could have been extended to at most one other country – but certainly not five. Genuinely cross-EU data on general musical attitudes and behaviours would thus have been unavailable, meaning most of the research questions set forth in D3.1 would have gone unanswered.

This rationale is transferable beyond the OpenMusE project itself. Realistically, the only research organisations capable of affording regular CAPI fieldwork are national statistics institutes, Eurobarometer, and well-established academic consortia like the European Social Survey. In an ideal world, such organisations would collect longitudinal data on the state of culture in Europe. However, in the real world of fluctuating budgets and scientific and political priorities, this has not occurred. For instance, the Survey on Income and Living Conditions (SILC) included a very lean cultural participation module in 2022 and 2015, while Eurobarometer ran partially harmonised batteries on cultural access and participation in 2025 and 2013. During these long interim periods, culture stakeholders which *cannot* afford CAPI surveying must seek to fill the data void. They have options for doing so, including secondary data analytics, qualitative research, and surveys using modes other than CAPI. Often, when surveys are run, they use pure convenience samples: e.g., they are recruited via websites and social media without quota targets, yielding samples that do not even approach representativity.

One reason may be that an over-emphasis on CAPI as the "gold standard" in survey data collection perpetuates the misunderstanding that all other modes are created equal (i.e., equally inferior). This is untrue. Access panels run in compliance with the ESOMAR Code of Conduct employ multi-channel recruiting to reduce self-selection bias, monitor panel composition to ensure the inclusion of historically underrepresented groups, and regularly employ quality-control measures to exclude fraudulent respondents and responses. They

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furthermore centralise consent and incentivisation procedures, reducing the ethical and legal risk burden on survey designers. Scale and infrastructure allow them to do so cheaply: the quota samples used in this project cost ca. €4 per complete quality-checked response. This means that a robust quota sample can be sourced for not much more than it would cost to promote a survey link over social media. In the instance that more fieldwork funding is available, superior intermediate solutions also appear. For instance, if a random sample is desired and the fieldwork period is rather long and flexible, options include telephone interviewing with random digit dialing or address-based sampling with postal invitations to a web survey. If better coverage of offline populations is required but a random sample is not, a sequential mixed-mode design could utilise CAWI first with telephone or face-to-face follow-ups targeting these populations.

In brief, then, we hope to use this report to demonstrate the cost-impact viability of regular CAWI surveying on culture, and to argue for regular CAWI surveying on culture by the EU institutions. Specifically, we argue that CAWI surveying is an appropriate middle ground when the surveying institution:

- Has a fieldwork budget under ca. €10,000 per target country/region;
- Requires data that are representative of the online population, but not of the total population;
- Requires data that can be used to estimate relationships between cultural and non-cultural variables and test hypotheses that are useful in policy planning: e.g., gauging public approval across the political spectrum of broadcast quotas or culture vouchers; but
- Does *not* require data precise enough to guide concrete resource allocation: e.g., gathering evidence for the establishment of music therapy programmes in public hospitals.

This report is based on the **CAWI survey findings in Germany, France, Italy, Spain, and Poland. These five countries make up around 63% of the EU population**. Respondents were recruited from the Dynata access panel with quotas set on age (16+), education, and gender (see Annex 1)[2].

1.4.2 Fieldwork, quotas, and weighting

Fieldwork was conducted between 28.05.2025 and 11.07.2025. Most quota targets were met during fieldwork, with a significant shortfall in the low education bracket in Poland and over-recruiting in the middle bracket, as well as notable shortfalls in the younger age brackets in France and to a lesser extent Germany, and over-recruiting in the older brackets. Accordingly, two rounds of within-country weighting were applied. In the first round, weights were applied to correct any divergence from the quota target of +/- 5%. This yielded

[2] During the research design phase, a number of fieldwork methods and partners were assessed. Specifically, potential fieldwork providers were asked to specify various data quality criteria (e.g., their available sampling frames, and/or the size and recruitment methods of their access panels within the target countries; procedures used to prevent multiple responses by single participants; procedures by which participants are recruited; exclusion criteria; etc.). Based on this assessment, Dynata (https://www.dynata.com/) was chosen as a fieldwork partner. This choice was made based on the size, inclusiveness, and representativity of the Dynata access panels in the target countries; the diversity of methods used to recruit participants; and the robustness of quality control procedures utilized on the provider side. Quality control procedures utilized by Dynata included checks against “speeding” (respondents running through the online questionnaire too quickly to be plausible) and “straight-lining” (respondents giving the same answer, e.g., “somewhat agree”, to all questions in a given question battery). In addition to these criteria, “traps” were incorporated into the survey questionnaire: e.g., at certain points, respondents were prompted to confirm they were a human rather than a bot. The purpose of such “traps” is to ensure that participants carefully read the survey questions and answer them in good faith. SINUS conducted independent quality checks of the final datasets, which included reviews of matrix question response behavior (e.g., “straight-lining”) and contradictory responses across questions.

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some minor residual distortions beyond +/- 5% in other cells, which were corrected by applying minimal multipliers (see Annex 1: OpenMusE_T3.2_CAP_CAWI_within_country_weights_251220.xlxs, tabs “Sample achieved”, “Weighted sample v0”, “Corrective multipliers”, and “Weighted sample v1”). For analysis of the full cross-country sample as a single “target group”, population weights were also calculated (see Annex 1: OpenMusE_T3.2_CAP_CAWI_demo_pjangroup__custom_18408601_spreadsheet.xlxs). The design effects are minimal for the final within-country weights (wDemo_v1: DEFF = 1.01) and within acceptable range for the population weights (wPop: DEFF = 1.06) and the final population-adjusted weights (wDemoPop: DEFF = 1.07), though the latter warrant attention if significance testing is conducted across the full sample.

1.4.3 Measurement framework and indicators

Survey items were developed to enable **comparability across countries and population groups** and to support the development of **policy-relevant indicators**. Question modules were aligned with:

- the conceptual framework and research questions set out in D3.1;
- the Social-Ecological Systems Framework (SESF), applied in D3.4 and Section 3 of this deliverable as a theoretical framework to propose future research avenues.

1.4.4 Secondary data and literature integration

Where relevant, survey results are complemented by **open-access secondary data sources** and interpreted in relation to recent **policy and scientific literature**, with a particular focus on developments occurring between 2020 and 2025. This includes updated EU policy documents, Music Moves Europe outputs, and recent academic work on music ecosystems and sustainability.

1.4.5 Analytical approach

The analysis presented in Section 2 is primarily **descriptive**, focusing on cross-country comparisons and differences across socio-demographic groups (age, gender, education, income, subjective social status, and musical engagement). These descriptive findings form the empirical basis for the **indicator proposals and policy-oriented discussion** developed in Section 3.

Several concepts were used as crossing variables in the analysis (and/or are available in the datasets as crossing variables for future secondary analysis):

- **Age**: respondents were segmented into age groups (16-29, 30-39, 40-49, 50-59, 60-69, 70 and over) (S4). This was also a quota variable. Because age was asked as a numerical variable, other groupings are possible for secondary analysts.
- **Gender**: respondents were asked whether they identify as male, female, or another gender identity (or prefer not to say) (S3). This was also a quota variable. Only a very small number of respondents (N=12) selected the latter category; these respondents were included in the total sample but were unfortunately excluded from gender-based analyses, which utilised only the “male” and “female” categories.
- **Education**: respondents were segmented into education levels based on the ISCED code of their highest level of educational attainment (low: ISCED 0-2; mid: ISCED 3-4; high: ISCED 5 or above) (S2). This was also a quota variable. Details are available in Annex 1.

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- **Financial strain** was gauged by asking respondents how often they had difficulties paying their bills over the last 12 months (M75).
- **Subjective social status** was measured by asking respondents to locate themselves on a scale of 1 to 10, where '1' corresponds to "the lowest level in society" and '10' corresponds to "the highest level in society" (M77).
- **Political orientation** was measured by asking respondents to locate themselves on a scale of 0 to 10, where 0 means the left and 10 means the right (M78).
- **Value orientation** was measured using the Twenty Item Values Inventory (TwIVI), a validated short indicator based on the 57-item Schwartz Value Survey (SVS; Schwartz, 1992) (M79). The SVS identifies ten dimensions of human values, which the TwIVI operationalises using two questions each (Sandy et al., 2016).
- **Geographical variables** were added using self-reported postcodes (S5), mapped to NUTS regions using GISCO TERCET correspondence tables (https://gisco-services.ec.europa.eu/tercet/flat-files):
    - Urban-rural status and urban-rural remoteness on a NUTS3 level via Eurostat data on rural development (https://ec.europa.eu/eurostat/web/rural-development/methodology).
    - Regional gross domestic product (PPS per inhabitant in % of the EU27 (from 2020) average) by NUTS 2 region (Eurostat dataset tgs00006).
    - Percentage of persons aged 25-64 in the NUTS2 region of residence with tertiary educational attainment (Eurostat dataset tgs00109).
    - Percentage of persons in the NUTS2 region of residence at risk of poverty or social exclusion (Eurostat dataset ilc_peps11n).

Data cleaning and analysis were performed by SINUS. Scripts used in data processing are available in the project repository at: https://github.com/openmusiceurope

Supplementary analyses will be performed in anticipation of scientific publication and made available via the OpenMusE project website between the deliverable submission and the project final review.

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2 Findings

2.1 Music education

2.1.1 Research questions, literature review summary, and data gaps

RQ. *What are the roles and comparative importance of formal and informal education in musical engagement in Europe?*

As reviewed in D3.1 (Section 2.3.1), formal music education in Europe provides structured training in theory, history, and performance, traditionally oriented toward classical traditions but increasingly integrating jazz and popular repertoires. This formal system supports the transmission of technical and theoretical knowledge but often reaches only a portion of the population, with variations linked to national curricula and resource allocation. In parallel, informal education — through private lessons, community ensembles, peer learning, and more recently, online platforms — offers a more flexible and accessible form of participation. It plays a crucial role in fostering creativity, building musical identity, and connecting individuals to community and cultural life. As D3.1 highlighted, the coordination between formal and informal educational settings can enhance resource use and educational quality, suggesting the need for greater policy coherence between institutional and community-based music education.

2.1.2 Survey findings

The *D3.1* literature review identified several important data gaps. It noted the scarcity of comparable quantitative data on access to and participation in formal versus informal music education across European countries and demographic groups. There was limited evidence on how socio-demographic factors—such as income, gender, and age—affect engagement, and on the extent to which economic barriers constrain participation. The review also underlined the emerging but under-researched role of digital and online learning in widening access and inclusion. Addressing these gaps required new data on participation patterns, spending, and attitudes toward publicly supported music education.

Key gaps addressed in the survey

The OpenMusE survey collected cross-national data on music learning practices. The survey included items on participation in school-based music education (M50_1–3), engagement in music learning outside school (M55_1–3), household spending on lessons or training (M69_1-2), and attitudes toward publicly funded or free music education (M63_16).

The data show that **school-based music education (M50)** is widespread but unevenly distributed across Europe. In primary school, participation ranges from 48% in France and 50 % in Italy to 60 % in Spain, 73% in Germany, and a remarkable 79 % in Poland. By lower secondary, patterns shift: Italy (71%), Germany (65%) and France (61%) maintain strong provision, while Spain (48%) register moderate engagement and Poland drops sharply to 31%. By upper secondary, participation declines everywhere, falling to between 19 % in Poland and 38 % in Germany, illustrating the consistent tapering of music education after compulsory schooling. These findings confirm that most children encounter music at some stage of school life, but sustained instruction into adolescence remains the exception rather than the norm. Participation in music education beyond upper secondary school is also comparatively uncommon, with 11% of respondents reporting having studied music as a main subject in tertiary or vocational programs and 17% reporting having studied it as a minor subject.

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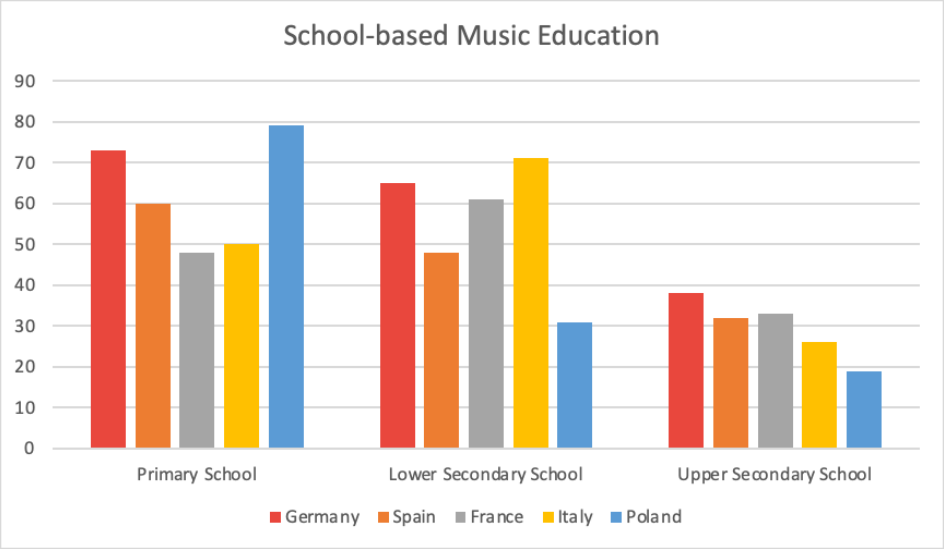
Cross-country contrasts also point to different curricular priorities. Germany and Italy maintain relatively strong provision through the middle years, while Spain and France ensure steady but shorter exposure, and Poland prioritises early introduction but lacks continuity beyond primary school. The general decline in upper-secondary participation reflects a systemic trend whereby music becomes marginal once students specialise in academic or vocational tracks. **Graph 1** presents the proportion of respondents who reported that their school education included classes on music, highlighting affirmative responses across the selected indicators.



***Graph 1** – School-based Music Education. Source: SSSA, CHP, SINUS (2025).*

Among those respondents who received music education in primary, lower secondary, and/or upper secondary school, the most taught subjects (M51) were **basic music theory** (68%), Western classical music (41%), and traditional folk music from the country of residence (37%). Polish respondents were most likely to have studied their own folk music traditions (60%), while French respondents were least likely (23%). Other styles of music – jazz, folk music from other countries, and pop/rock/etc. – are taught infrequently. However, more younger respondents report having studied such styles than older respondents, which anecdotally suggests that **curricula may be getting more diverse**. For instance, 57% of respondents aged 16-29 and 39% of those aged 30-39 who were taught music in school report having studied pop/rock/etc., as compared to only 26% of those aged 60-69 and 11% of those 70 or above.

Notably, according to the survey (M63_16), **support for free music education is overwhelmingly positive across all five countries**, underscoring a shared belief that access to musical learning should be universal and publicly guaranteed. Support levels range from 64% in Poland, 66% in France, to 67% in Germany, 68% in Spain and a high of 69% in Italy. Opposition is minimal everywhere (between 3% and 6%), suggesting a strong consensus that music education constitutes a public good. The stability of this support across age, gender, and education levels indicates that the value of music education enjoys broad cultural legitimacy, cutting across demographic boundaries.

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2.2 Music discovery and information behaviour

2.2.1 Research questions, literature review summary, and data gaps

RQ. *What are the roles and comparative importance of different channels and sources in contemporary music information repertoires (i.e., patterns of information seeking and information consumption) in Europe? What is the role of music in broader information repertoires?*

The literature reviewed in D3.1 suggests that streaming services dominate music discovery through algorithmic recommendations. However, traditional channels like radio and word-of-mouth remain important. Music information-seeking is also embedded in broader media interactions, reflecting socio-cultural dynamics. However, our literature review found that little hard data exists on the frequency and cross-country differences in use of various music discovery channels; interactions between algorithmic recommendations and user behaviour; the diversity of recommendations made via different channels; and the possible mutual impacts or interaction effects between music discovery and information-seeking and other aspects of musical life, such as music education (see also Section 2.1), music and social life (see also Section 2.3), or music consumption (see also Section 2.8).

2.2.2 Survey findings

The survey examined multiple aspects of music discovery and information behaviour, including the importance of discovering new music in general (M41), the relative importance of various discovery channels (M42), the ease or difficulty of finding music in different languages (M43 and M44), the use of streaming platform features (M45 and M46), the ease or difficulty of finding music from different countries (M47), satisfaction with music recommender systems (M48), and the perceived impact of these systems on listening habits (M49).

Note that the survey section on music discovery was partially harmonised with a convenience-sample survey conducted by the Study on the Discoverability of European Content led by Panteia – this will be discussed in the forthcoming follow up to the December 2025 *Briefing Report: Music Ecosystem Research, Innovation, and Policy Pathways* (https://www.openmuse.eu/policy_pathways).

The survey shows that **music discovery (M41)** is an important and engaging activity for many Europeans. Overall, 18% of respondents rated it as “very important – I can’t live without new music,” and an additional 29% rated it as “important” – for a total of 48%. Enthusiasm is highest in Spain (58%) and Italy (56%), and lower in Poland (44%), Germany (41%), and France (42%). **Age emerges as a stronger differentiator than nationality:** more than half of respondents under 40 consider discovering new music important or very important (56-57%), compared with only 16% among those aged 70 and older. **Graph 2** shows the importance of discovering new music by age group (M41), highlighting a steady decline in interest across successive cohorts.

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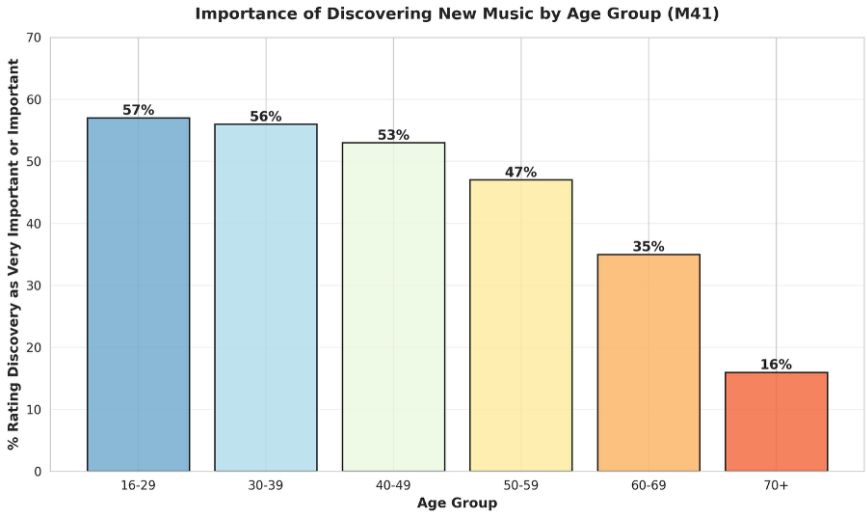
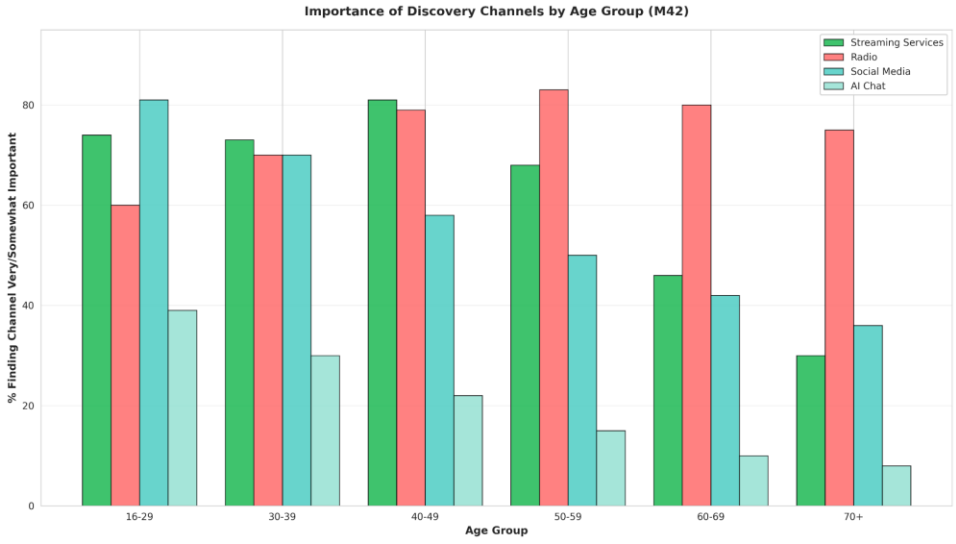


***Graph 2** – Importance of discovering new music by age group. Source: SSSA, CHP, SINUS (2025).*

Averaged across age groups, radio and streaming services are the most important discovery channels, each rated as "very" or "somewhat important" by around 73% of respondents (M42). However, streaming services dominate among younger and middle-aged adults (74%, 73%, and 81% in the 16–49 range), while nearly half (46%) of those aged 60–69 use such services. Radio, in contrast, remains the key source for older middle-aged adults, especially those aged 50–59 (83%) and 40–49 (79%). Social media platforms are considered important by 81% of respondents aged 16–29, with importance declining steadily across age groups—though over one-third (36%) of respondents aged 70+ still consider them important. AI-assisted recommendation tools also show a strong generational divide: 39% of respondents aged 16–26 use them for discovery, compared with only 8% of those aged 70 and above (M42).

Graph 3 shows the importance of different discovery channels for new music by age group (M42), highlighting generational differences between streaming- and social media–based discovery among younger audiences and radio-based discovery among older adults.

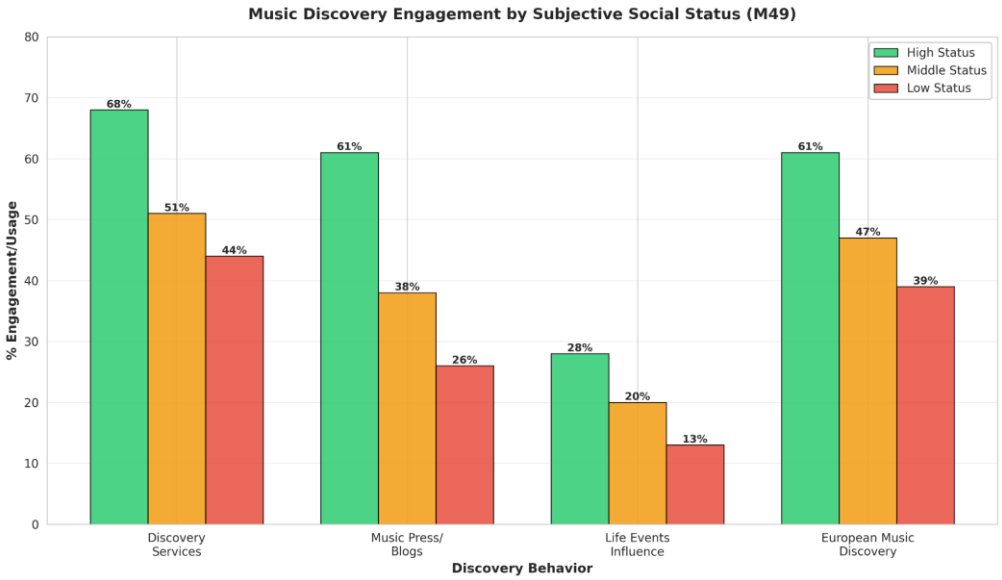


***Graph 3** – Importance of discovery channels by age group. Source: SSSA, CHP, SINUS (2025).*

Manual searches for familiar songs or artists are used by 90% of 16–39-year-olds, 86% of 40–49-year-olds, and 53% of those aged 70+ (M46_1). Creating one's own playlists shows a similar pattern, used by 87% of 16–29-year-olds and by almost half (46%) of those over 70 (M46_6).

Across all countries, English-language music is considered most likely to be listened to, with Germany and Italy at 94%, followed by Spain (90%), Poland (89%), and France at 91% (M43_2 TOP2). With age, the likelihood of listening to music in one's native language increases, reaching 78% among those aged 70+ compared with 65% among 16–29-year-olds. The pattern is reversed for English-language music, where 66% of 16–29-year-olds say they are "very likely" to listen, while only 42% of the 70+ do. Non-English and non-native-language songs are also more often listened to by younger people (69% among 16–29 vs. 52% among 70+) (M43_3). The subjective importance of discovering diverse music in terms of lyrical language rises among younger people, with at least half of all respondents aged 16 to 49 finding this important, compared with only one in four among (24%) those aged 70+ (M49_7).

Gender differences play a minor role in music discovery, showing little variation in behaviors such as the use of playlists prepared by streaming services, which are listened to somewhat more often by women (77%) than by men (66%) (M46_5). Much clearer **differences emerge** instead **across subjective social status groups**. High-status individuals consistently show greater engagement with discovery services, online communities, and music press use compared to middle- and low-status groups. Discovery services are mainly used by people with high subjective social status (68%) compared to middle (51%) and low (44%) status. Live events are valued twice as much by high-status (28%) as by low-status people (13%). Press use such as expert blogs or magazines shows similar patterns, with 61% of high-status individuals finding it important, versus 38% middle- and 26% low-status. High-status individuals are also more likely to discover music from other European countries (61%) than middle- (47%) or low-status (39%) people (M49_5). **Graph 4** shows Music discovery engagement by subjective social status (M49), showing higher engagement among high-status respondents across all discovery dimensions.



***Graph 4** – Music discovery engagement by subjective social status. Source: SSSA, CHP, SINUS (2025).*

Insofar as it is correlated with subjective social status, **education** functions similarly, though at lower levels of differentiation. Clearly, subjective engagement with music in general is also a critical factor. People who say that music is important discover more music in general (66%) than those who do not consider music important (33%) (M49_1). Those who see music as an important part of their quality of life are more interested in discovering new music (60%) than those who rate it "so-so" (33%) or unimportant (23%). Simple musical exposure is also a factor in cross-border musical discovery: people who spend more hours listening to music in general also discover more music from other European countries (59%) compared with those who spend fewer hours (36%) (M49_5).

In brief: **younger people and those with higher education or social status are more likely to explore new, diverse, and international music; use diverse discovery channels, and engage with new technologies like AI for discovery**. Older adults prefer music in their native language, rely more on the radio, and engage less proactively with new technologies or social media. Gender and nationality show relatively few relevant differences; subjective social status, on the other hand, is a factor across the board, as is its correlate education. Finally, **personal engagement and the perceived importance of music strongly influence listening habits, discovery behavior, and satisfaction** across all formats and platforms.

2.3 Music and social life

2.3.1 Research questions, literature review summary, and data gaps

RQ. *How do offline and online social network dynamics shape musical life in Europe and vice versa, for the general population on the one hand and music professionals on the other? What role do music and musical activities play in socialisation?*

The D3.1 report highlighted that music plays a central role in social bonding and collective identity across Europe, serving both as a cultural resource and a means of emotional connection within families, communities, and peer networks. It also noted a lack of comparable quantitative data on how these dimensions vary across age groups, countries, and levels of musical engagement. The present survey offers new insights into these questions, revealing the extent to which music contributes to family life, community participation, and personal relationships among European citizens[3].

2.3.2 Survey findings

Across the five countries surveyed, **music emerges as an important component of respondents' personal and social environments**. A clear majority — around six in ten respondents — agreed that music was or is an important part of life in their family (M56_7). Agreement was strongest in Spain (62 %), Italy and Poland (both around 57 %), followed by France (53 %) and somewhat lower in Germany (51 %). These results confirm that family engagement with music remains widespread, though with noticeable national variation. Respondents

[3] In addition to the descriptive analysis, a principle component analysis was conducted on the battery of questions on music and personal identity, social connections and community, self-regulation, cultural connections, and music and politics (M56_2–M56_15, M57_2–M57_14). The aim was to identify any differentiation in attitudes toward, for instance, the role of music in personal identity formation vs. its role in community life. However, all statements loaded strongly to a single factor (loading scores of 0.48 to 0.73), suggesting that they reflect a single, general construct such as "the sociocultural value of music". Which is to say: people who affirm the value of music in one life domain, tend to affirm its value in other domains as well.

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with higher education and those identifying as musicians were more likely to agree, suggesting that musical capital and active participation reinforce intergenerational transmission. Adults aged between 30 and 59 tended to express slightly higher family musical involvement (between 56 % and 60 %) than both younger respondents aged 16–29 (51 %) and older adults aged 60–69 (52 %) and 70+ (49 %), while gender differences were minimal.

At the community level, when asked whether music is **an important part of life in their local community** (M56_8), roughly half of respondents across the sample agreed. The highest levels of agreement were found in Spain (56%) and Italy (49%), reflecting the enduring role of local festivals and musical traditions in these contexts. In contrast, only about a third of respondents in Germany (35%) perceived music as an important aspect of community life, with France (45%) and Poland (46%) close to the European average. People with medium or higher education, as well as those who make or perform music, attend concerts, or engage regularly with local cultural events, were more likely to report that their communities have a strong musical presence.

Music also functions as **a vehicle for everyday social interaction**. More than half of respondents agreed that they often share new music with people they know (M56_9). This practice was most common in Spain (55%), followed by Italy, Poland and France (respectively 54%, 51%, and 49%), while less frequent in Germany (39%). Younger respondents (especially those aged 16–29) were markedly more active sharers, with more than 60% agreeing, compared to about one third among the oldest age group. Musicians and regular concertgoers also reported higher levels of sharing, indicating that **active musical involvement enhances the social diffusion of musical tastes and knowledge**. Socio-economic factors play a subtler role: sharing was slightly more common among respondents with higher education and among those who described music as personally important or central to their quality of life.

Just as importantly, **music fosters enduring personal relationships.** Roughly one third of respondents agreed that they had met some of their best friends through music (M56_10). This share was highest in Spain and Poland (about 36-39%) and lowest in Germany (29%). Younger adults aged under 35 were significantly more likely to agree than older respondents, pointing to the role of music **in youth sociability and identity formation**. Among musicians, however, the connection between music and friendship is much stronger: over half of those respondents who identified as professional or semi-professional musicians (55%) reported forming close friendships through music, compared with about 41% among amateurs. Regular live-music attendees and those who consider music important for their well-being also scored substantially higher, confirming the link between active participation in music and the social depth of musical engagement.

2.4 Music, society, and politics

2.4.1 Research questions, literature review summary, and data gaps

RQ. *How does music contribute to the public good in Europe? Can initiatives and policy interventions that target music produce positive outcomes in policy-relevant areas, such as Social integration? Economic and social cohesion? Civic engagement?*

The literature reviewed in D3.1 suggested numerous points of evidence that music participation correlates positively with civic engagement, democracy, and social cohesion. Participation in music can increase voting likelihood, volunteering, and community involvement, fostering democratic values and inclusion. Policy interventions targeting music can promote social integration, cohesion, and civic participation, particularly

when addressing barriers to cultural access. However, significant data gaps remain. In particular, there is little quantitative evidence connecting music with cultural and political identity or linking musical participation with wider forms of societal participation. Comparable gaps exist regarding the role of cultural policy in sustaining national and local music cultures, scenes, and communities.

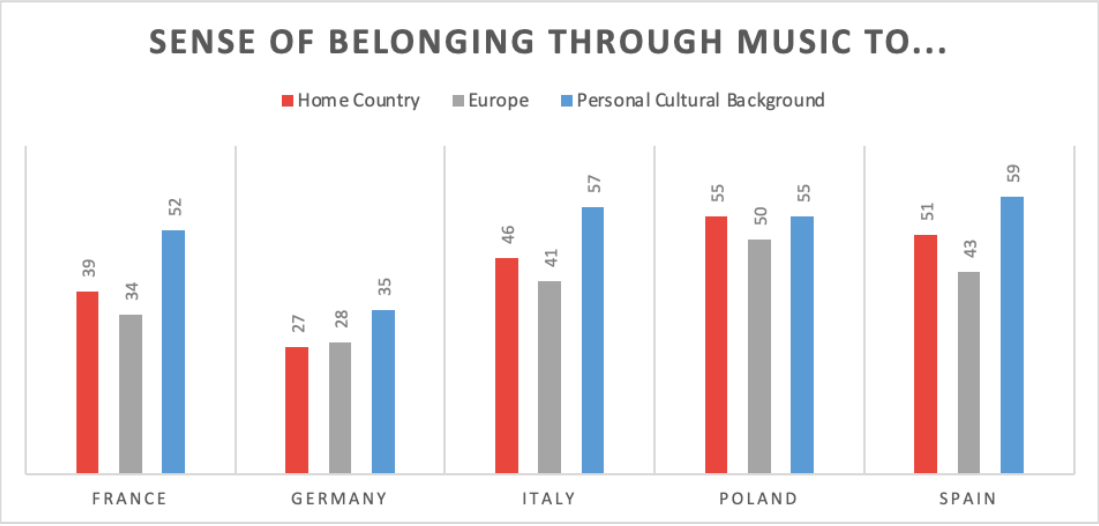
2.4.2 Survey findings

The survey explored several dimensions linking music, identity, and civic values, including the role of music in identity formation and cross-cultural identification (M57_2–M57_7); knowledge of the music industry and cultural policy (M58, M59); attitudes toward cultural funding programmes (M60, M61); broadcast quotas (M62); and other policy measures (M63). Respondents were also asked which political parties they believed would best implement cultural policy (M63b) and to place themselves on the left–right scale (where 0 = far left and 10 = far right; M78). Questions concerning "music as a human right" (M57_9–M57_14) are presented in the next section.

Overall, the findings show that **music broadly reflects societal and political values, norms, and attitudes**. The data also support the position that **musical participation correlates positively with civic engagement, democracy, and social cohesion**.

One point of interest in this chapter concerns identity formation and the sense of belonging to both individual European countries and Europe as a whole through music. Most participants agreed with statements about feeling connected to their country through music, and many also felt that music fosters a connection to Europe. Agreement with feeling connected to one's own country was highest in Poland (55 %), followed by Spain (51 %), Italy (48 %), France (46 %), and Germany (39 %) (M57_2). Agreement with feeling connected to Europe was slightly lower (M57_3). A characteristic pattern emerges when comparing Poland and Spain with Germany: the sense of connection to both one's own country and to Europe through music is significantly higher in Poland (M57_2 = 55 %; M57_3 = 50 %) and Spain (M57_2 = 54 %; M57_3 = 43 %) than in Germany (M57_2 = 27 %; M57_3 = 28 %).

Graph 5 illustrates respondents' sense of belonging through music to their home country, to Europe, and to their own cultural background (M57_2–M57_7).



Graph 5 – Sense of belonging through music to Home Country, Europe and Personal Cultural Background.

Source: SINUS, SSSA, CHP (2025).

Perhaps because of Europe's cultural heterogeneity, agreement with statements that music connects people from different cultural backgrounds (M57_4) and that access to music from diverse cultures makes life more interesting (M57_7) was high (55 % and 56 %, respectively). Agreement was even higher among respondents identifying as left-wing (M57_4 = 59 %; M57_7 = 65 %). Spain again recorded the highest share of respondents who felt connected to people from different cultures through music (62 %), followed by Poland (60 %), France and Italy (53 %), and Germany (52 %) (M57_4).

In line with the OpenMusE project's transversal focus on cultural diversity (see D2.2 and D2.3), the analysis examined **support for cultural policy measures to protect local music in the platform economy** (M63). The idea that major music-streaming services should invest in local artists (M63_2) achieved 50% support across all five countries: it was most popular in France (58 %) and Poland (54 %). A plurality also supported requiring music streaming services to share data on how artists are paid and recommended (45%). Likewise, the idea that large online ticket platforms should support and invest in local live music scenes achieved 51% cross-nationally, with the most in Poland (57%) and Spain (56%). Most respondents also supported regulating the practice of reselling music tickets for profit ("scalping") (52%), and a plurality supported using a percentage of tourism taxes to support local live music scenes (47%).

Guided by the project aim of helping mitigate the impact of economic inequality on music creation and consumption, the survey also explored **support for "redistributive" cultural policy**. Surprisingly, one of the most popular policy measures proposed was ensuring that artists can access social protection even when they are self-employed, with 58% support. This measure garnered the most support from respondents who associate with the political left (67%) but also won a majority within the self-identified political right (54%). Somewhat fewer respondents – 51% -- supported ensuring that artists can earn a minimum income, even when they're self-employed. This measure also polarises between left (61% support) and right (48%). Offering vouchers for students and other low-income individuals (M63_15) received 56% support overall. This points to widespread backing for policies that improve the working conditions of artists and strengthen social participation in culture.

When asked about **public funding for music and other cultural activities**, agreement across all five countries was strong: 57 % in Spain, 56 % in Italy, 53 % in Poland, 52 % in France, and 51 % in Germany (M60). Support for funding diverse creative activities (M61_2 = 60 %) and international cultural exchanges (M61_3 = 59 %) was also widespread, particularly in Spain, Poland, Italy, and France. Respondents further supported linking public funding to decent working conditions (M61_7), environmental sustainability (M61_4), gender equality (M61_9), and ethnic inclusion (M61_10). Average approval across these measures was ≈ 48 %, while in Germany it was lower (≈ 33 %). Agreement with progressive cultural-policy goals was strongest among respondents with high subjective social status (61 %), those identifying as politically left-wing (53 %), and those reporting good knowledge of cultural policies (67 %). These findings suggest a broad aspiration toward civic engagement and social cohesion through cultural policy.

An interesting deviation appears among respondents identifying with the political right, who show relatively high agreement with supporting public funding for recipients in small towns and rural areas (M61_11 = 63 %) and for preserving national cultural traditions (57 %). By contrast, support within this group is lower for

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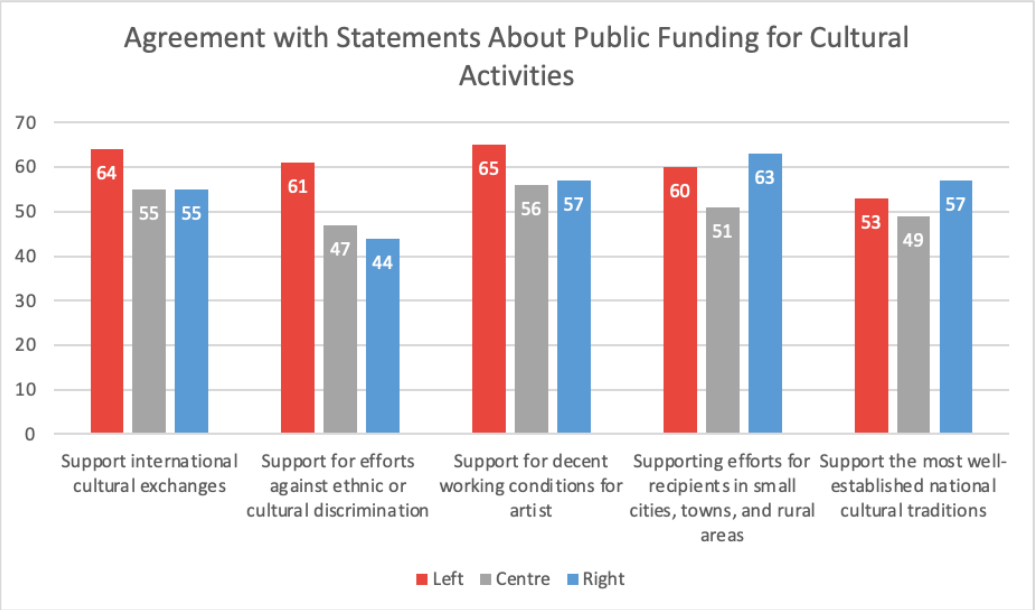
identity-related priorities such as efforts against ethnic or cultural discrimination (M61_6 = 44 %). Among centrist respondents, agreement ranges between 47 % and 55 % across these items, while among those on the political left it consistently exceeds 60 %, particularly for inclusion and social-equity measures.

Graph 6 shows levels of agreement with statements about public funding for cultural activities, disaggregated by respondents' self-placement on the left–centre–right political scale (M61–M63).



***Graph 6** – Agreement with Statements about Public Funding for Cultural Activities. Source: SINUS, SSSA, CHP (2025).*

This pattern indicates that, among right-oriented respondents, support for public cultural funding is most strongly associated with territorial balance and national traditions, whereas among left-oriented respondents it aligns more with inclusion and identity-related objectives.

Respondents were also asked which political party in their country they believe would be best at implementing cultural policy (M63b). The results reveal that **perceptions of effective cultural governance tend to follow the dominant political landscape within each country**. The leading responses identify *Partido Socialista Obrero Español* (PSOE) in Spain (33 %), *Koalicja Obywatelska* (KO) in Poland (33 %), *Fratelli d'Italia* (FdI) in Italy (25 %), *Christlich Demokratische Union* (CDU) in Germany (26 %), and *Rassemblement National* (RN) in France (32 %).

Graph 7 summarises these national preferences, showing the political party receiving the highest share of mentions in each country in response to the question: "*Which political party in your country do you think would be best at implementing cultural policy*?" (M63b).

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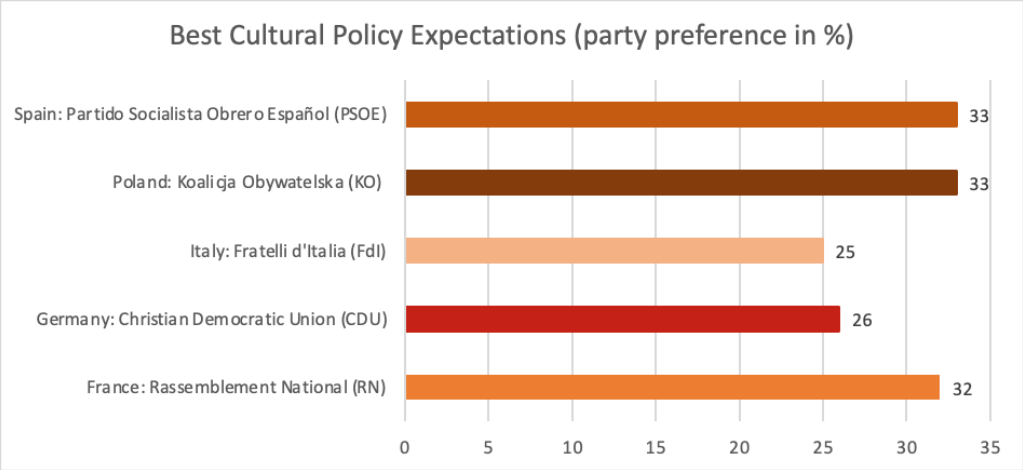

***Graph 7** – Best Cultural Policy Expectations by Party Preference. Source: SINUS, SSSA, CHP (2025).*

Percentages represent the share of respondents selecting that party among all valid responses.

2.5 Music and human rights

2.5.1 Research questions, literature review summary, and data gaps

***RQ.** What challenges endanger European musicians' freedom of expression? What progress have EU member states made toward recognising the "right to culture"? What initiatives have been taken to protect and promote minority music in Europe?*

While censorship of musicians is relatively rare in Europe, progress toward fully recognising musicians' rights to personal and cultural expression varies among EU and non-EU states. Recent policy initiatives increasingly highlight the "right to culture" and the protection of cultural diversity, yet disparities in implementation persist.

As reviewed in **D3.1 OpenMusE (Section 2.3.5 "*Enjoyment and expression: Music and human rights*")**, three key themes frame this discussion at EU-level policy. First, **artistic freedom** remains a policy priority but continues to face obstacles, particularly for politically engaged and minority musicians. Second, **equal access to cultural participation**—including music education and fair working conditions—has been recognised as a democratic right, yet remains under-documented in quantitative terms. Third, **the protection of minority and indigenous music traditions** requires stronger policy action to safeguard Europe's cultural diversity.

In parallel, **D2.2 OpenMusE (*Music Diversity and Circulation*)** situates these human-rights concerns within the broader framework of diversity and inclusion in the music ecosystem. It stresses that artistic freedom and cultural rights depend on equitable representation, visibility, and fair remuneration for all creators. Structural inequalities affecting women, minority, and independent artists continue to constrain full participation in musical life. D2.2 also calls for fair-circulation and diversity-monitoring policies as practical mechanisms to strengthen cultural rights and ensure equitable access to musical expression.

Despite the EU's formal commitment to cultural rights, D3.1 highlighted the lack of quantitative data on how citizens perceive and experience these rights, while D2.2 identified complementary evidence gaps in monitoring diversity, representation, and equitable access within the music ecosystem. The current survey

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directly addresses these gaps through indicators on **freedom of musical expression, censorship, access to music education, fair working conditions, and inclusion in the music sector** (M57_9–M57_14, M61_5–M61_10, M63_10, M63_16). Together, these results provide a valuable cross-national quantitative perspective on public consent regarding the "human right to music."

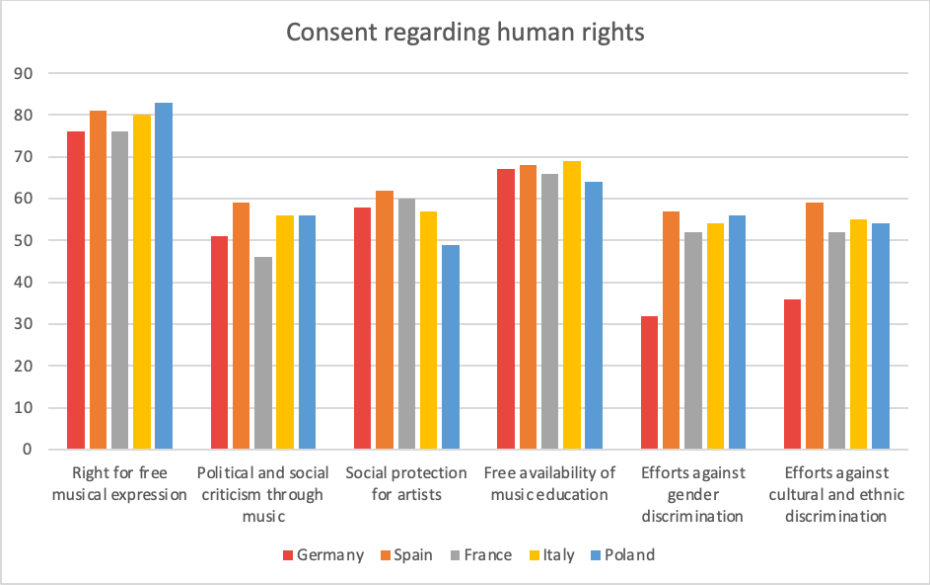
2.5.2 Survey findings

In continuity with Section 2.4, the survey explored relationships between music, human rights, and civic participation using items M57_9–M57_14 (rights to musical expression, learning, listening, censorship, working conditions, and musicians speaking out), M63_6–M63_16 (policy support measures for artists' rights), and M61_5–M61_10 (inclusion and anti-discrimination).

Across the five countries surveyed, there is **strong consensus supporting musicians' fundamental rights**. A clear majority—between 76 % and 83 %—agreed that every child and adult should have the right to express themselves musically in freedom (M57_9). Similarly, around 78 % agreed that everyone should have the **opportunity to learn musical skills and participate in any kind of music** (M57_10–M57_11). These findings are consistent with Article 27 (1) of the Universal Declaration of Human Rights (1948), which affirms that "everyone has the right to freely participate in the cultural life of the community, to enjoy the arts and share in scientific advancement and its benefits."

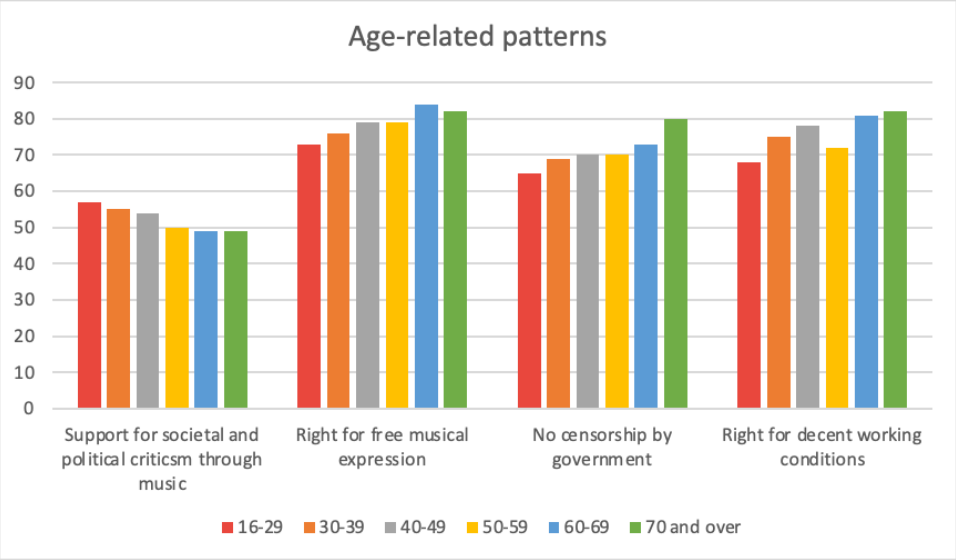
Agreement was also widespread regarding **decent working conditions and fair payment for musicians and other music professionals** (M57_13): support was strongest in Poland (82 %) and Spain (78 %), followed by Germany (75 %), Italy (74 %), and France (71 %). Respondents likewise rejected **government censorship of music or other art forms**, with 77 % in Poland, 74 % in Spain, 69 % in France, 66 % in Italy, and 66 % in Germany expressing opposition (M57_12).

Support for political or social critique through music (M57_14) was somewhat lower overall—59 % in Spain, 56 % in Italy and Poland, 51 % in Germany, and 46 % in France—reflecting more nuanced attitudes toward overtly political artistic expression. **Graph 8** below reports the proportion of respondents expressing different levels of agreement with statements linking music to human rights, inclusion, and fundamental freedoms.



***Graph 8** – Consent regarding human rights. Source: SINUS, SSSA, CHP (2025).*

An **age-related pattern** is also evident. Older respondents (60 years and above) show the highest levels of agreement with statements concerning free musical expression, participation, and opposition to censorship (M57_9–M57_13), with endorsement rates between 73% and 84%. By contrast, younger respondents (16–29 years) express slightly lower agreement on these items (≈ 68 %). However, when it comes to political and societal criticism through music (M57_14), the trend reverses: 55 % of those aged 16–29 agree, compared with 49 % among respondents aged 60 and above. **Graph 9** below presents age-related differences in the levels of agreement with statements linking music to human rights and fundamental freedoms.



***Graph 9** – Age-Related Patterns in Support for Music and Human Rights. Source: SINUS, SSSA, CHP (2025).*

Differences by political orientation reveal a clear ideological divide. Respondents identifying as politically left-wing display consistently higher agreement with statements supporting **political criticism through music, efforts against gender discrimination, and efforts against cultural or ethnic discrimination** (around 61–65 %). Agreement among centrist and right-leaning respondents is notably lower (≈ 44–50 %). **Graph 10** below presents levels of agreement with human-rights-related statements by respondents' political orientation.

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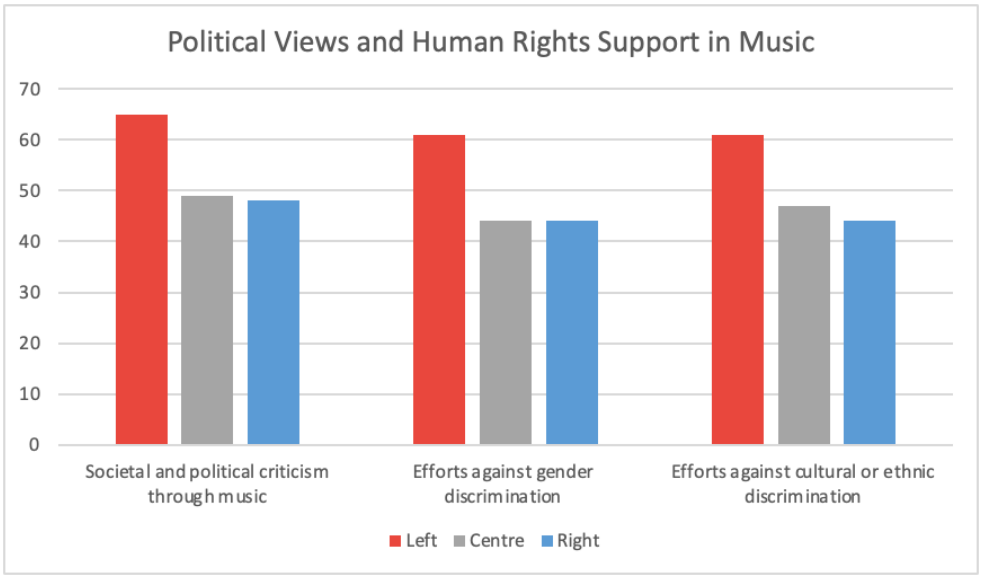


***Graph 10** – Political Views and Support for Human Rights in Music. Source: SINUS, SSSA, CHP (2025).*

Additional indicators address **social protection for artists** (M63_10) and **free access to music education** (M63_16). Support for these measures was highest in Spain (62 % and 68 %) and lowest in Poland (49 % and 64 %). Regarding equality and inclusion (M61_5–M61_10), Spanish respondents expressed the strongest agreement (52–57 %), while German respondents recorded the lowest (31–36 %).

2.6 Musical creation – non-commercial

2.6.1 Research questions, literature review summary, and data gaps

***RQ.** What is the extent of musical activity in Europe among the population as a whole? Do the above factors and/or sociodemographic variables play a role? What is the economic impact of amateur music-making, for instance through instrument sales, lessons, or related expenditures?*

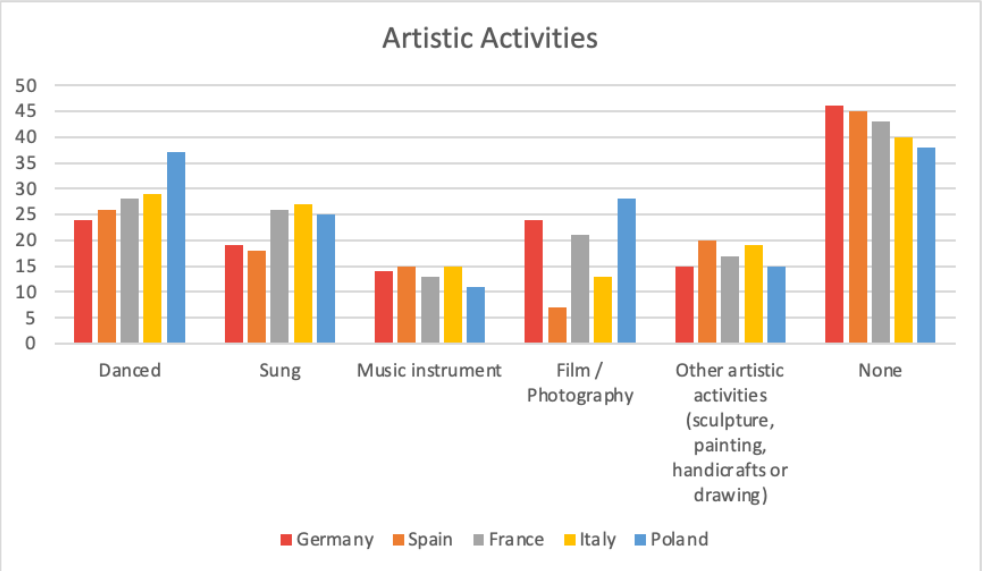
Understanding non-commercial musical creation is essential for mapping the cultural ecosystem in Europe. Existing research consistently shows that amateur musical activity constitutes a major component of cultural participation, contributing to creative identity, well-being, and the sustainability of musical labour markets (Finnegan & Finnegan, 2007; Dubois & Méon, 2016). Yet the economic footprint of amateur practice remains underestimated, as traditional cultural statistics prioritise monetised professional output, overlooking the social and economic value generated by unpaid and community-based creative work.

2.6.2 Survey findings

The OpenMusE survey reveals that amateur musical activity is widespread across Europe, though unevenly distributed by country and demographic group (S8).

Over the twelve months preceding the survey, 14 % of adults played a musical instrument, with the highest participation in Spain and Italy (15 %) and lower levels in France (13 %) and Poland (11 %). Singing was more

common, reported by 23 %, peaking in France and Italy (26–27 %). Dancing emerged as the most widespread embodied musical activity, with 28 % participating and exceptionally high engagement in Poland (37 %).



***Graph 11** – Artistic Activities by Country. Source: SINUS, SSSA, CHP (2025).*

Other creative practices—such as film, photography, crafts, or digital content creation—range from 8–19 %, illustrating that musical engagement sits within a broader ecosystem of amateur creativity. Importantly, only 43 % of respondents reported no participation in any artistic activity, confirming that **amateur creativity forms a core component of contemporary cultural life**.

Sociodemographic shaping of musical activity

Age emerges as the strongest predictor of non-commercial musical creation (S8). Young adults (16–29) participate at the highest rates across all activities: 25% play instruments, 39% sing, and 40% dance. Participation declines steadily with age; adults aged 60+ show much lower involvement, with instrumental playing dropping to 7%. These patterns reflect both life-course shifts and structural gaps in creative opportunities for older adults, suggesting potential areas for targeted cultural policy.

Gender differences are moderate but distinct. Women are more likely than men to participate in expressive forms such as singing (28% vs. 22%) and dance (32% vs. 24%), while men participate more in digital or instrumental creation. **Graph 12** visualises differences between men and women across selected musical and digital activities.

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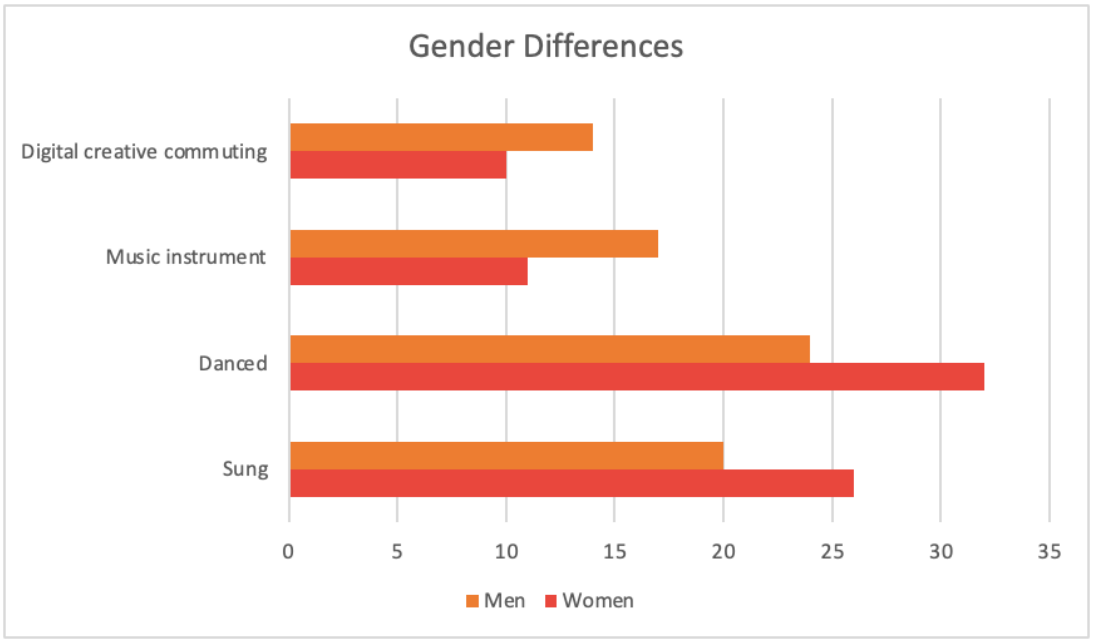
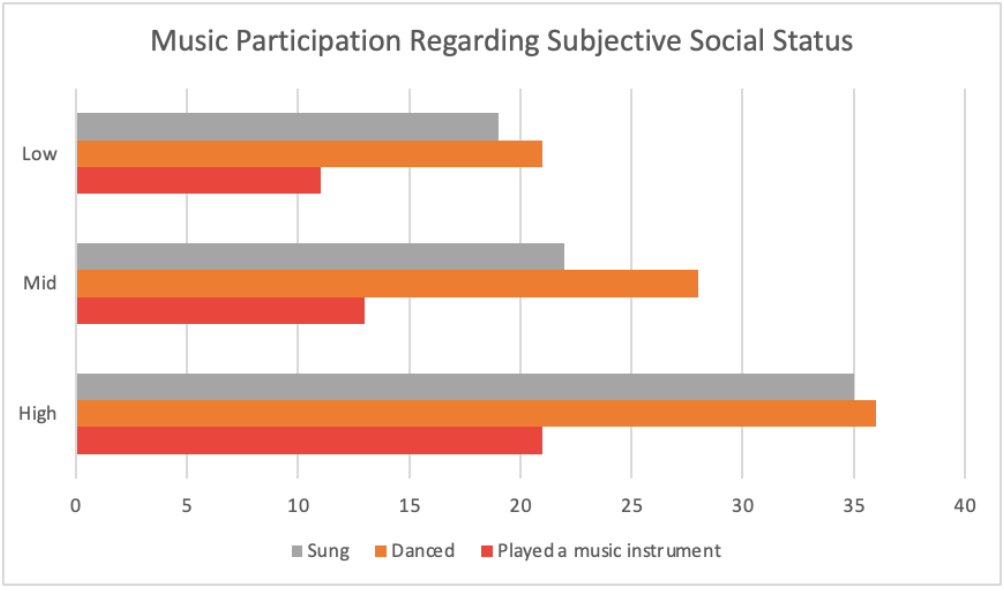


***Graph 12** – Gender Differences in Musical and Creative Activities. Source: SINUS, SSSA, CHP (2025).*

Socio-economic status also **plays a decisive role**. Individuals who "most of the time" struggle to pay bills participate substantially less across all musical forms. Subjective social status is an even stronger predictor: those identifying as "high status" are significantly more active across musical practices (21% played an instrument; 35% sang; 36% danced) compared with "low-status" individuals (11%, 19%, 21%). **Graph 13** compares rates of singing, dancing, and instrument playing by perceived social status.



***Graph 13** – Music Participation by Subjective Social Status. Source: SINUS, SSSA, CHP (2025).*

These findings confirm that economic stability, education, and cultural capital remain key enablers of amateur creativity (Dillon 2021 after Bourdieu 2007; Edgerton & Roberts 2014).

Identity-based musical status: beyond income-based definitions

Understanding non-commercial musical activity requires more than mapping behaviours; it **demands attention to how individuals understand their musical identity**. This is especially relevant given ongoing debates in the economics of culture. Commonly, an "artist" within the labour market was defined by an economic criterion: a person qualified as a "specialist" in art making if at least 51% of their total income derived from artistic activity. In the report *What do you mean by 'status of the artist'?* (Polivtseva 2024: 13) one can read for instance that:

> *Income is a crucial metric frequently considered in various national frameworks across the EU. Some programmes require individuals to demonstrate that they earn a certain income through their artistic activities. In Austria, for instance, eligibility for grants from the Artists' Social Insurance Fund (KSVF) requires artists to earn a minimum of EUR 6,221.28 from self-employed artistic activities in the current calendar year*.

This definitional problem has existed within the cultural economics and policies for a long time (Wassall & Alper 1989; Jeffri & Greenblatt 1989, Wassall & Alper 1989, and others).

This narrow definition has, however, been challenged. In the latest report *Artists as Workers* (2024), Throsby and Petetskaya introduce a broader notion of a "practising professional artist", defined not by income share but by indicators of creative engagement, contribution to substantial artistic work, professional training, or receipt of artistic grants (Throsby, Petetskaya 2024, p. 8). This reflects the growing recognition that artistic labour is hybrid, intermittent and multi-sourced, and that income is an incomplete indicator of professional identity.

This conceptual evolution is crucial in interpreting OpenMusE data. On the one hand, OpenMusE relies on self-identification (M64), allowing respondents to classify themselves as amateur/hobbyist musicians, semi-professional musicians or full-time professionals. These categories capture perceived identity rather than verified economic status. They reflect how individuals position themselves within the musical field, yet they must not be conflated with formal labour market definitions (the subject of commercial music creation is discussed in the next section of the report). On the other hand, for those respondents who indicate having earned income from musical activities over the past 12 months, the survey also asks about what percentage of total personal income this musical income makes up – this analysis follows in the section "musical creation – commercial". **Graph 14** shows the distribution of musical self-identification among all survey participants. A clear majority – 80 % – consider themselves amateur or hobby musicians, 15 % identify as semi-professional, and 5 % as full-time professional musicians.

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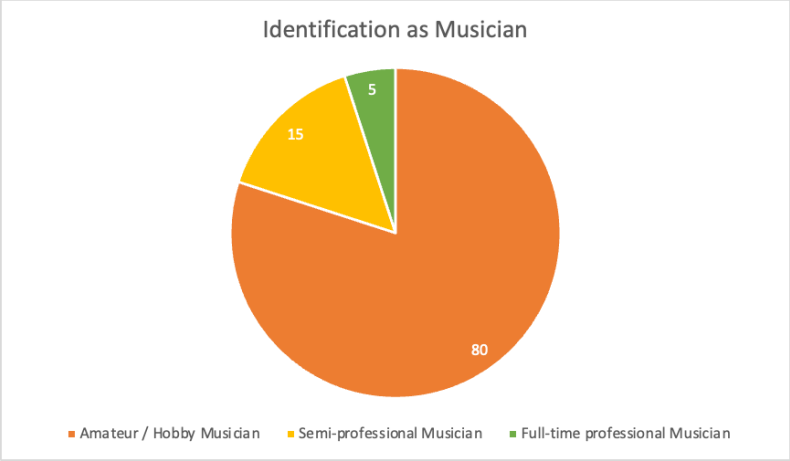

***Graph 14 – Self-Identification as Musician**. Source: SINUS, SSSA, CHP (2025).*

This confirms that **musical identity extends beyond formal labour-market definitions**, supporting the idea that artistic identity is shaped as much by engagement and aspiration as by income.

Identity–practice mismatch

In 1989 Frey, and Pommerehne proposed a set of indicators that, in their view, help to determine who can be regarded as an artist. These include the time devoted to creative practice, income generated from artistic activity, public recognition beyond the artistic field, reputation within the community of other artists, the quality of the works produced, membership in professional bodies or artists' associations, possession of formal artistic qualifications, and subjective self-identification expressed in the statement "I am an artist." (Poprawski & Maciejewski 2020; Frey & Pommerehne 1989).

One of the most striking findings is the **mismatch between musical identity and economic activity**. Among those who played an instrument or sang in the past year, 20% identify as semi-professional or professional musicians, yet only 12% report having earned musical income (M64). For those who did, this represented on average 29% of total personal income, well below the conventional 51% threshold for professional classification.

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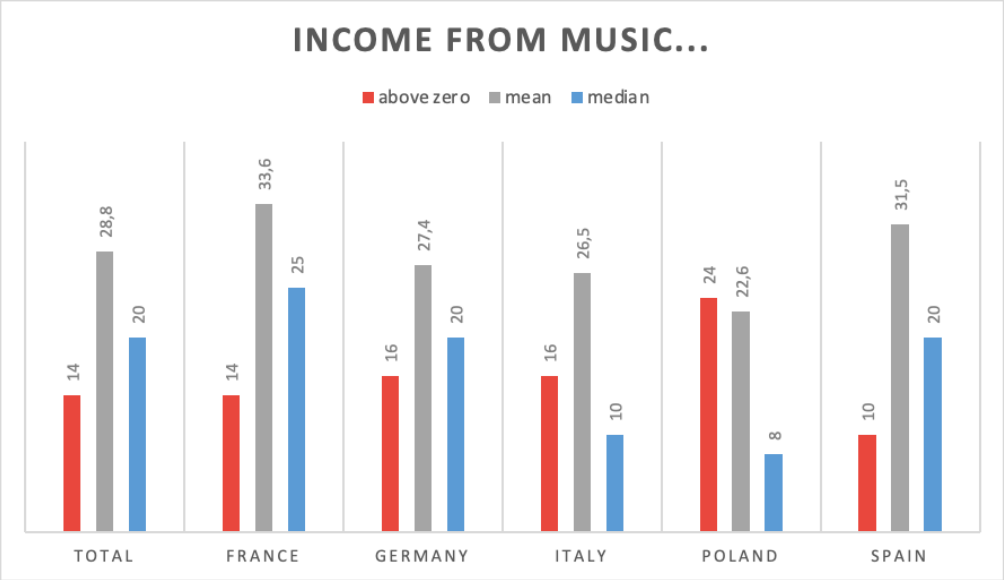

***Graph 15** – Income from Music. Source: SINUS, SSSA, CHP (2025).*

Graph 15 summarises income patterns from musical activity by country, showing mean, median, and share of respondents with income above zero. However, the percentage of respondents who report having earned musical income over the past 12 months is significantly lower at 12% (S9; note graph 15 also includes respondents who earned income from support activities – ranging from sound-engineering to working at venues or music-related businesses – rather than music-making). Among those who report having earned musical income, this reaches only 29% of their total personal income – well below the 51% threshold mentioned above (M73).

This discrepancy highlights two important dynamics. First, **musical identity persists even during periods of commercial inactivity**, reflecting long-term engagement, aspirations, or belonging to musical communities. Second, a substantial population of intermittent, informal or seasonal music-makers exists whose **creative lives are not captured by straightforward economic indicators**. This aligns with emerging cultural economics literature arguing that artistic identity increasingly reflects engagement, training and aspiration—not merely earnings (Throsby and Petetskaya, 2024).

Economic spillovers of amateur musical activity

Although **non-commercial musical creation** is unpaid, it **generates substantial economic spillovers**. Individuals who identify as musicians—whether amateur or professional—reported moderate spending on instruments, equipment, lessons, repairs or accessories (M69). **Table 1** presents mean expenditure patterns for musical instruments, training, and other goods, distinguishing amateur from semi-professional or professional musicians in Germany (these quantities are given as indicative, prior to outlier removal; cross-national averages had not yet been processed at the time of submission and will be reported separately).

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Expense category	Amateur musicians (M64; N=207)	Semi-professional musicians (M64; N=46)	Professional musicians (M64; N=14)
Musical instruments and equipment (M69_1t)	150 EUR	558 EUR	511 EUR
Music lessons, training, materials, etc. (M69_2t)	92 EUR	381 EUR	303 EUR
Other goods and services related to playing music or singing (e.g., studio rental, professional society memberships, etc.) (M69_3t)	36 EUR	151 EUR	229 EUR

***Table 1** – Expenditures by Musician Type -- Germany. Source: SINUS, SSSA, CHP (2025).*

Such expenditures support local creative economies – including retailers, independent teachers or other creative economy stakeholders – and indirectly positively support the wider economy of the city or a region (Seaman 2011). They also help sustain the material infrastructure upon which professional musicians depend. The category of (self-identified) semi-professional musicians is particularly interesting here: their self-reported spending outlays to enable musical practice are as high as those of professionals. In this sense, **amateur and especially semi-professional creativity is a foundational economic driver**: it nurtures demand for goods and services that maintain a healthy musical ecosystem. However, German semi-professional musician report that on average, musical income makes up only 33% of their total income, as opposed to 41% among professionals: this means that the ratio of income-to-expense for semi-professionals is quite high.

2.7 Musical creation – commercial

2.7.1 Research questions, literature review summary, and data gaps

***RQ.** What is the extent of participation in the informal musical economy in Europe among the population as a whole? What is the spectrum of activity between "amateur" and "professional" musicianship? How do musicians move between these two poles?*

Existing research shows that **non-commercial (amateur) musical activity is widespread** and plays a crucial social and cultural role. Participation varies across age, education, and socio-economic status, and contributes significantly to local economies through spending on instruments, lessons, and related goods and services. However, **cross-national measurement of amateur music-making** remains limited, with **little comparative evidence** on its frequency, socio-demographic patterns, and broader economic and social impacts. Data are also lacking on **how individuals navigate between amateur and professional domains**, and on the **non-economic benefits** of musical participation for communities and well-being.

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The CAWI survey contributes to filling this gap by mapping how individuals define their musical identity, the frequency of their performance and practice, and the extent and diversity of musical income.

2.7.2 Survey findings

Musical creation in the OpenMusE survey is understood broadly as any activity in which individuals play, perform, produce, teach, or otherwise engage with music — whether privately or publicly, and whether or not it generates income. Crucially, the distinction between *amateur/hobbyist* and *semi-professional or professional* musicians is twofold. This approach captures both **identity-based musicianship** and **income-based participation**. This makes it possible to analyse the informal musical economy, the permeability between amateur and professional spheres, and the scale and character of musical income generation across Europe.

Income from Music: Prevalence and Social Distribution

Across all countries, **only a small share of adults earn income from music (S9)**, indicating a relatively limited but socially structured semi-professional sector. The highest shares were observed in Spain (14 %), Germany (13 %), and France (12 %), followed by Italy and Poland (11 % each) (S9).

Age is the strongest predictor of musical income. Among young adults aged 16–29, 26 % report earning income from music — more than double the overall population share. Rates then decline steadily with age:

- 18% among 30–39,
- 11% among 40–49,
- 8% among 50–59,
- 2% among 60–69,
- and virtually 0–2% among 70+.

Gender differences are relatively small: 14% of men and 11% of women earned income from music. Self-identified non-binary or “prefer not to say” respondents record 7%, though the base is extremely small.

Socioeconomic position shows stronger differentiation: respondents with high subjective social status report 34 % earning income from music – *a finding that should be interpreted carefully* – compared with 7 % among those of low status. Interestingly, respondents who struggle to pay bills most of the time are about twice as likely to earn musical income (20 %) as those who never struggle (8 %)[4]. The clear split between *subjective* social status – which correlates positively with music income – and *objective* economic status – which correlates negatively with music income – can be interpreted as a classical distinction between social/cultural and economic capital.

Finally, **cultural engagement** is an important correlate: those who describe music as central to their **quality of life** report 13% earning income, compared with 9 % among others. Similarly, respondents who attended live music events in 2025 report higher rates (18 %) than those who had not attended since before that year.

[4] The authors / quality-checkers concur that this is a very high number and should be validated through follow-up research rather than taken at face value; methodological effects could be involved here.

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Together, these findings depict a **small but socially patterned group** participating in Europe's informal and semi-formal music economy.

Patterns of Musical Activity: Public and Private Contexts

Public performance is comparatively rare among self-declared musicians (M65_1, M66_1). Across all musicians, 54% report *never* playing for an audience in the past year. Only 7% play for an audience *multiple times per day* or *daily*. Whilst those performing *weekly or more* (multiple/day + daily + several/week) represent about 21%.

Country differences are modest. Spain and Italy show slightly higher weekly performance rates (~10–12% several times/week or more). France and Poland record slightly higher rates of "never" (61% and 54%, respectively).

Forceful contrasts appear between amateur and professional musicians: among amateurs/hobbyists, over 60% *never* perform for an audience. Whilst among semi-professional and professional musicians, around 25–30% never perform publicly, meaning the majority perform at least occasionally. This supports the view that public performance remains a core differentiator between amateur and professional practice — though not an absolute one.

Private musical practice

Private musical activity is much more widespread and frequent (M65_2, M66_2). Across musicians: 9% practice privately *multiple times per day*, 13% do so *daily*, 19% *several times per week*. Together, these high-frequency groups account for 41% of all musicians. Only 24% report *never* engaging in private practice. Professionals again show higher frequency: over 45% practice several times per week or more, versus ~38–40% among amateurs. These patterns suggest that the informal musical sphere — private, non-market practice — forms a large reservoir of musical skills, creativity of the wider population.

Sources of musical income: a fragmented and multi-activity landscape

Among those who earned income from music, the data reveal a **highly fragmented and low-intensity pattern of activity** (M70). Most musicians engage in multiple small-scale sources of income, combining creative, technical, and service work. **Graph 16** presents the proportion of respondents earning income from specific musical and related activities, illustrating the fragmented, multi-activity character of semi-professional work. *Please note that the base here is the 12% of respondents who report earning any musical income over the past 12 months (S9): for example, that 33% of this 12% earned income from singing, not 33% of the total population. This means that only 4% of the total population reported earning income from singing*.

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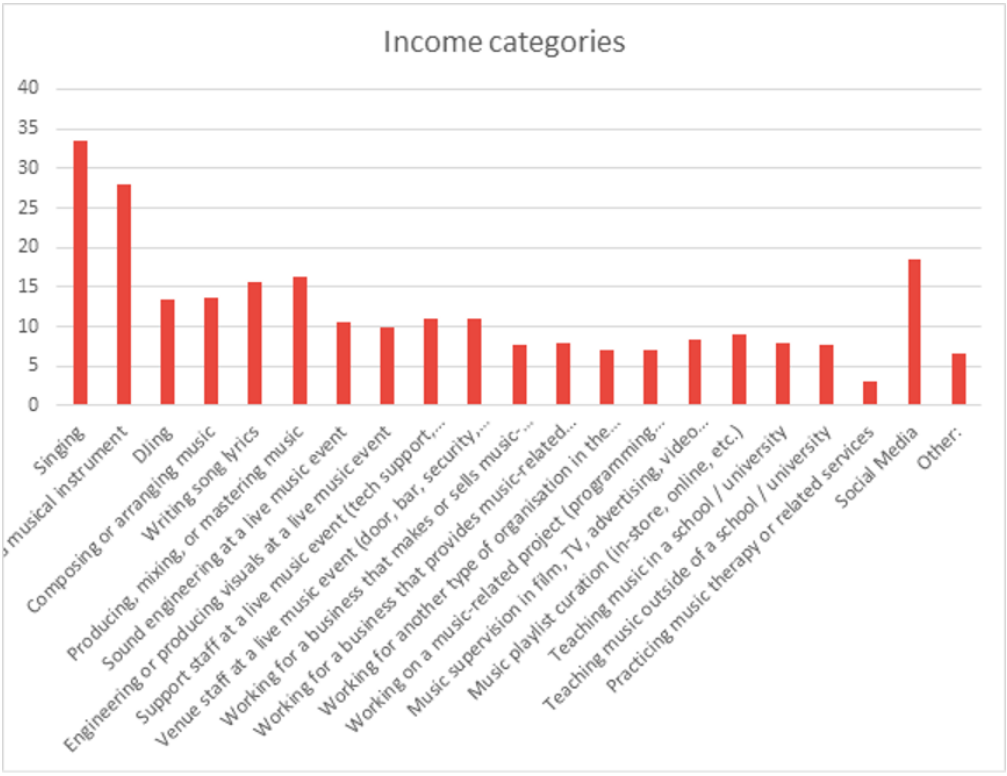

Graph 16 *– Income categories. Source: SINUS, SSSA, CHP (2025).*

The most common income sources among the group of music income earners are: Singing (33%); Playing a musical instrument (28%); Social media and online content creation (19 %); Writing lyrics (16%); Producing, mixing, or mastering (16 %); Composing or arranging music (14%); Sound or visual engineering (10–11%) Smaller shares report income from teaching, music-related businesses or services, or technical support roles at live events (8–11 % each).

Professionals tend to be more diversified, often combining multiple forms of work, while amateurs earn from one or two. At the country level, Germany, Spain, and Italy show slightly higher shares in teaching and performance, while France and Poland show stronger participation in digital and technical work (e.g. production, sound, or visual engineering).

Income Levels

Even among those who earn income, levels remain low. The majority report *small* or *occasional* income, only a minority indicate *substantial* or *regular* earnings, and the distribution aligns with the profile of a supplementary or hybrid labour market. This matches the broader picture: only 14% earn *anything*, and among them, a large share reports performing or working only occasionally. Musical income represents, on average, about 29% of total personal income — well below the 51% threshold traditionally used to define professional status. This pattern aligns with broader trends in cultural labour, characterised by portfolio work, freelance activity, and income precarity.

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2.8 Participation in musical life

2.8.1 Research questions, literature review summary, and data gaps

RQ. *How can the consumption of musical goods and services in Europe be accurately assessed, in view of sectoral characteristics such as high informality and the prevalence of zero-price uses? How can improved consumer-side data support improved price-setting and asset valuation for business activities and policymaking (cf. Open Music Europe D1.1)?*

Existing research highlights that participation in musical life across Europe is nearly universal but highly uneven in its monetisation. Informal, non-ticketed, or community-based events constitute a large share of participation, while conventional cultural statistics remain biased toward formal transactions. Data gaps persist in measuring these **informal and hybrid modes of participation**, particularly regarding live attendance, consumer spending patterns, and ancillary expenditures (travel, hospitality, local services). The CAWI survey (S6_1 - S7_9) fills these gaps by combining behavioural, financial, and contextual variables to create a more holistic picture of Europe's music economy.

2.8.2 Survey findings

Understanding participation in musical life across Europe requires analytical tools capable of capturing both **behavioural engagement** (listening, attendance, digital use) and the **economic footprint** of these activities. The challenge is considerable: music consumption today is characterised by a high degree of informality, substantial non-monetised participation, and widespread zero-price uses, including free streaming, non-ticketed concerts, community events, or household-shared subscriptions. These blind spots systematically limit the interpretive value of traditional cultural statistics, which privilege monetised transactions.

Across the total sample, most participants **value live music as a meaningful part of cultural life**. A plurality (47%) of participants rate live events as very or somewhat important, confirming their central place in musical life. Only a small minority report that they don't find live events unimportant (12%). More than half of respondents report attending a concert (54%) or live music in a bar or pub (54%). Nearly half participated in live music at cultural festivals or public events (48%), private celebrations such as weddings or parties (48%), or restaurants offering live music (46%). Participation also extends to club-based formats such as DJ nights (40%) and large-scale music festivals (39%), as well as to digitally mediated forms such as live-streamed concerts (39%).

By contrast, institutionally framed performing arts reach a smaller, though still substantial, share of the population. Ballet, dance performances, or opera were attended at least once in the past year by 24% of respondents, while dinner shows or theatre performances with live music reached 32%. Participation in immersive or experimental formats, such as music events in metaverse or VR/AR environments, remains marginal (16%). Overall, these distributions indicate that **musical participation** in Europe **is most strongly embedded in everyday social practices and hybrid leisure contexts**, rather than concentrated in formal cultural institutions alone.

What is more, the share of high-frequency live event participants (>5 times per year) ranges from approximately 2% to 12% of the population, depending on the type of event. Across both institutionally framed (S6) and everyday live music formats (S7), high-frequency participants constitute a relatively small but highly

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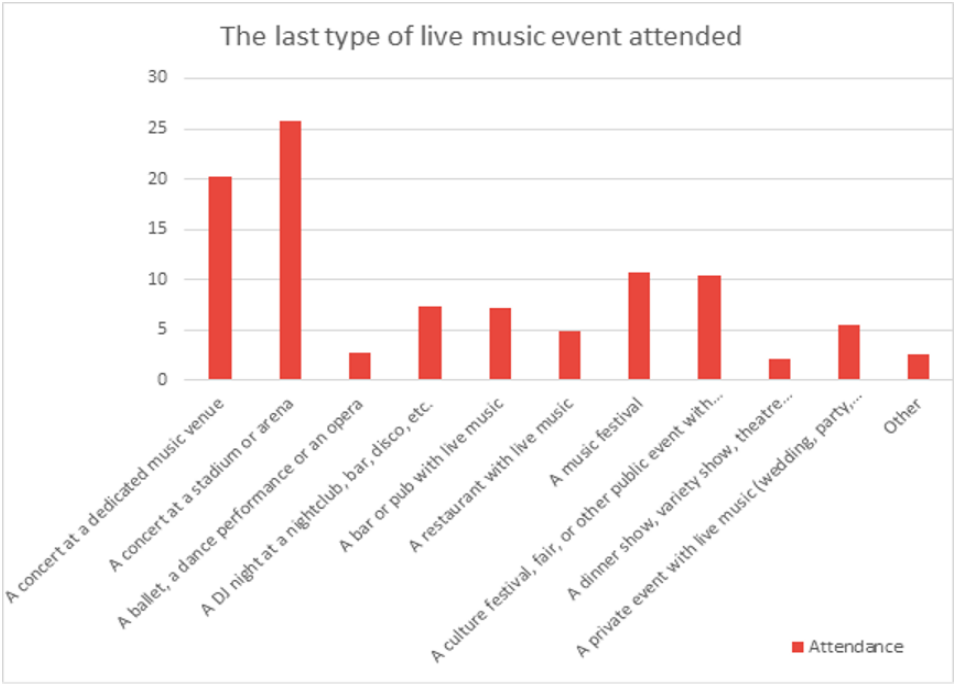
engaged minority, most visible in informal, recurring settings such as bars, clubs, and restaurants with live music. It should be noted that **public funding of culture affects the level of private expenditure** (Blaug, 2019), a relationship that is clearly visible in the data presented below. High participation rates coexist with relatively low levels of individual spending, suggesting that **subsidised provision, free access, and informal modes of participation play a crucial role in sustaining musical life** across Europe.

Live music attendance: widespread participation, partial monetisation

Across all five surveyed countries, engagement with live music remains high. Thirty-five percent of respondents attended a live music event in 2025, and an additional 48% had attended at least one before 2025, confirming that participation is both widespread and habitual. Country-level differences are modest yet notable: live attendance in 2025 reaches 31% in Germany, 37% in France, 35% in Italy, 35% in Poland, and 38% in Spain (S6). These values illustrate a healthy and consistent demand for live music across Europe.

Importantly, **participation in live music** is not limited to formal concert settings, but **is strongly embedded in everyday social practices**. Concerts in arenas and dedicated venues are most frequent, followed by festivals, bars, and restaurant performances, underscoring the social embeddedness of live music in everyday life. **Attendance is most common in informal and socially oriented contexts**: 54% of respondents reported attending live music in bars or pubs at least once in the past 12 months, while 48% participated in live music at cultural festivals, fairs, or other public events, and an equal share attended private events such as weddings or parties. Live music in restaurants was also relatively common (46%). More specialised or institutionally framed formats attracted smaller shares of the population, including DJ nights in clubs (40%), music festivals (39%), and live-streamed music events online (39%). Participation was lower for dinner shows or theatre performances with live music (32%), and particularly limited for virtual music events in metaverse or VR/AR environments (16%). (S7_1–S7_9)



Graph 17 *– The Last Type of Live Music Event Attended. Source: SINUS, SSSA, CHP (2025). Participation refers to respondents who reported attending a given type of live music event at least once in the past 12 months.*

Overall, these patterns indicate that live music is most frequently experienced as an accompaniment to social interaction and everyday leisure, rather than exclusively as a ticketed cultural product.

However, the **economic dimension of attendance** reveals a different story. Of the group of respondents who remember the last gig they attended (M12), only 63% report having purchased a ticket, suggesting that more than half of live music participation occurs under (quasi-)zero-price conditions. This includes free festivals, community or municipal concerts, subsidised cultural events, school or amateur performances, or situations in which respondents attended by invitation and did not purchase their own ticket.

Ticket spending also displays strong cross-country variation, consistent with the structure of local cultural markets. Among the group of respondents who remember their last live music event, 71% purchased a ticket in Germany and 66% in Spain, as compared to only 58% in Italy and 53% in Poland. These national differences point to distinct policy and market configurations: higher proportions of paying audiences in Germany and Spain reflect more robust ticketed live music sectors, whereas France, Italy, and Poland combine high participation levels with a stronger reliance on subsidised, free, or informal live music provision.

In addition to tickets, the survey asked respondents who remembered their last gig how much they had spent on local transportation, food and drink at the venue, food and drink at other establishments, and live music merchandise (recordings, apparel, and other types of merch). Strikingly, 87% of this group spend on at least one such item. *The survey data on spending on tickets and non-ticket expenses have been comprehensively cleaned, analysed, and reported in **D1.5 "Report on the Pilot Study on Total Music Values"**, and combined with secondary data on live music attendance and economic input-output data and national value-added coefficients to generate estimates of the total contribution of live music to economic gross value added (GVA) and the full-time equivalent (FTE) employment effects of live music (Section 1)*.

It is worth noting that the cost of producing live music and other performing arts is structurally high and continues to rise, in line with Baumol's cost disease (Baumol & Bowen, 1966; Blaug, 1976). As a result, **pricing policy emerges as a key area of concern for European cultural systems**. Given the chronic underfunding of institutions staging live performance and the limited share of audiences willing or able to pay for tickets, it is particularly important to consider policy instruments that shape consumer behaviour. Despite widespread participation, the group of respondents declaring any monetary spending on live music remains relatively small, underscoring the tension between high social demand for live music and its fragile economic sustainability.

Recorded music consumption: universal listening, selective monetisation

Listening to music is nearly universal across Europe: the OpenMusE survey indicates that close to 100% of respondents listened to music the day before the survey. However, monetised participation remains uneven. 24% of respondents reported zero spending on recorded music in the previous month, underscoring the importance of advertising-supported streaming, free platforms, shared subscriptions, and household-level payment patterns. Above-zero spending is highest in Germany (81 %) and Poland (76 %), followed by Italy (74 %), Spain (75 %), and France (72 %), showing both high engagement and hybrid payment models (**Graph 18**).

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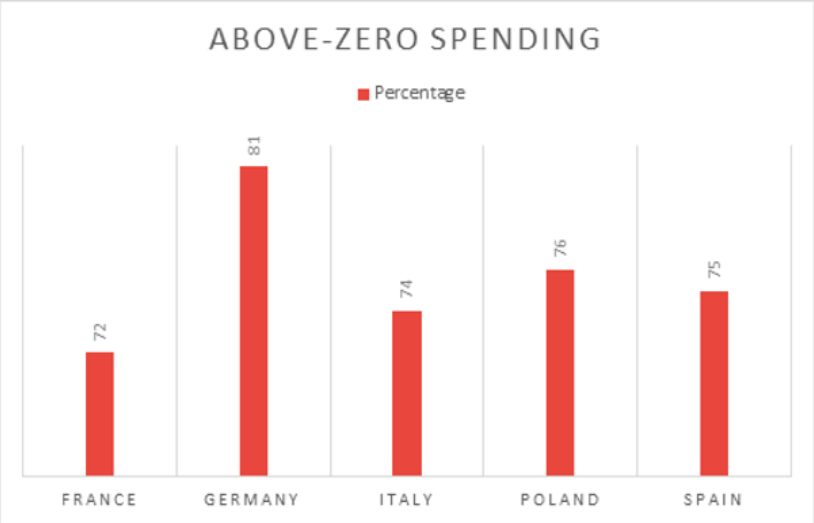

Graph 18 *– Above-Zero Spending on Recorded Music (by Country). Source: SINUS, SSSA, CHP (2025).*

These numbers indicate that although listening practices are almost identical across Europe, the monetisation of recorded music varies according to national market structures, subscription penetration, and consumer habits. The integration of free and paid ecosystems—ad-supported streaming, YouTube consumption, family accounts—means that monetary flows reflect only a fraction of real listening volume. These structural features, long recognised in digital media economics, are particularly visible in the OpenMusE data.

Beyond tickets and recordings: the extended economic footprint of live music

Expenditure linked to live events extends well beyond ticket prices. Respondents frequently report spending on travel, accommodation, food and drink, merchandise and other on-site purchases. (M18–M21). These ancillary purchases significantly amplify the local economic impact of live music and should be included when assessing the sector's total value.

Accommodation spending (M21_2) alone displays substantial internal variation, with mean values ranging from €39.8 to €169.9 depending on subgroup characteristics. Although medians remain at zero for many demographic segments—consistent with the fact that most live music events are local—the high means indicate that a smaller group of participants generates disproportionately high expenditures when events require travel.

These findings mirror established research in cultural economics: ancillary spending often matches or exceeds the price of the ticket, meaning that **the total economic value of live music experiences is systematically underestimated when measured through ticket sales alone**. For venue operators, artists, and local economies, these data underscore the importance of hospitality, transport, and food sectors as integral parts of the live music ecosystem.

Spending patterns across categories and instruments

Recorded music expenditures (M37) reveal strong differentiation between zero-price and monetised consumption, while musical instruments and lessons (M69) provide insight into the intensity and sustainability of amateur and professional musical engagement. Mean annual music spending (M55) confirms the broad

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reach of the music economy beyond immediate consumption: respondents invest in a mix of tickets, streaming, recordings, equipment, and education. Although national patterns differ, the overall picture that emerges is consistent: music consumers engage frequently but do not always monetise their participation, resulting in **hybrid economic ecosystems where free, low-cost, and premium modes coexist**.

Table 2 below summarises the key participation and monetisation indicators across the five countries, based solely on verified percentages from the survey dataset.

Indicator	Germany	France	Italy	Poland	Spain
Attended live music in 2025	34%	41%	39%	39%	44%
Of respondents who remember their last gig: Above-zero spending on tickets	71%	61%	59%	53%	66%
Of respondents who remember their last gig: Above-zero spending on non-ticket items	90%	82%	86%	85%	89%
Above-zero spending on recorded music	81%	72%	74%	76%	75%
Zero spending on recorded music (last month)	19%	28%	26%	24%	25%

***Table 2** – Participation in musical life — attendance and spending indicators by country (% of respondents).*

Source: SINUS, SSSA, CHP (2025).

The OpenMusE findings demonstrate that musical engagement across Europe is nearly universal. While attendance at live events remains high, it is only partially monetised, with a substantial share of participation taking place under zero-price or non-ticketed conditions. Informal forms of engagement—such as community events, private celebrations, subsidised concerts, and everyday live music settings—constitute a core component of the musical ecosystem. At the same time, the economic footprint of musical participation extends well beyond ticket purchases, encompassing indirect and complementary expenditures related to mobility, hospitality, and local services, thereby highlighting the broader cultural and economic value generated by live music activities.

2.9 Music, health, and well-being

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2.9.1 Research questions, literature review summary, and data gaps

RQ. *How is music used in physical and psychological health care systems in Europe? How can the impacts be assessed? How can the impact of music on general well-being be assessed, on the level of: Individuals? Communities?*

D3.1 found that music has been integrated into health care for numerous therapeutic purposes (mental health, neurological rehabilitation, social care), and its impacts can be assessed through clinical studies, patient reports, and community-level surveys. Specifically, their 2013 review, MacDonald pointed out that research on music, health and well-being typically distinguishes various overlapping domains (music therapy, community music, everyday listening) and that while the field has grown rapidly, the evidence base remains mixed (MacDonald 2013). He emphasised that **music can act as a non-invasive, creative intervention for psychological and physical health**, but that the modes, outcomes and mechanisms vary widely.

2.9.2 Survey findings

The OpenMusE survey provides a cross-country perspective on how Europeans relate music to emotional balance, everyday psychological comfort, and general well-being. Although the questionnaire includes only a few targeted items on emotional use (M56) and music therapy practice (M70, M71), the responses show consistent patterns illustrating how music functions both as a form of **informal self-care** and, to a smaller extent, as a **professional health-adjacent practice**.

Across all five countries, participants report using music to regulate mood, calm down, restore energy, and manage daily stress. This emotional dimension of musical engagement appears across all demographic groups, though with notable differences by age, gender, and socio-economic situation. Only a small share of musicians report practising music therapy or related services, but their profiles and income patterns suggest that music-based therapeutic work represents an emerging, though still modest, segment of the wider creative economy.

Emotional self-regulation and everyday well-being

The M56 indicators point to a widespread use of music for emotional and psychological support. Most respondents report listening to music to relieve stress, improve mood, or regain balance. Southern European countries — particularly Spain and Italy — consistently record the highest levels of emotional use, often surpassing 70% on key items. Germany and France show slightly lower, though still substantial, engagement, while Poland follows a similar pattern but with a notable emphasis on using music specifically to “escape from stress”.

Differences between amateur and professional musicians

The emotional and therapeutic dimensions of music differ in meaningful ways between amateur and professional musicians. Amateurs – who constitute the majority of active musicians in the survey – show the strongest emotional attachment to music. As shown in **Graph 19** below, around 77% of amateur / hobbyist musicians agree that music helps them manage their emotions and cope with difficult situations, compared with 64% of semi-professional or full-time musicians (M56). Similarly, about 80% of amateurs say music is an important escape from stress, versus around 71% of professionals, and roughly 87% of amateurs – compared

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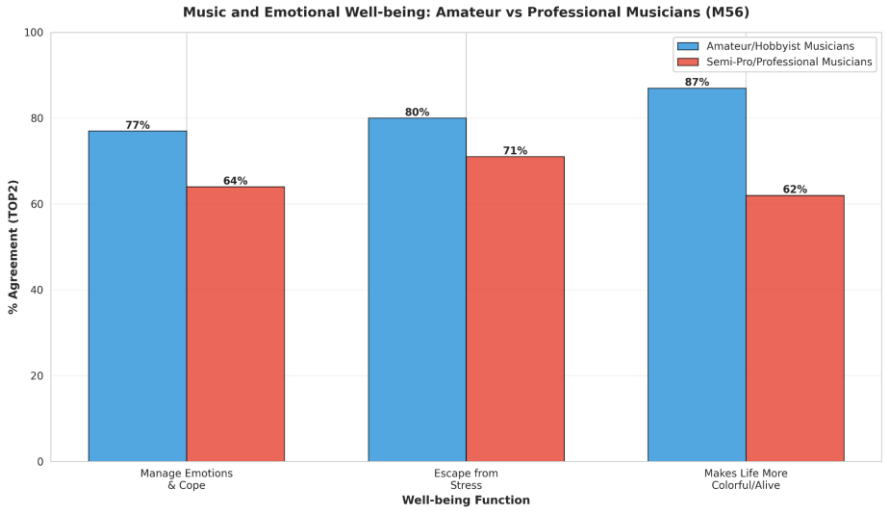
with about 62% of semi-professionals and professionals – feel that music makes everyday life seem more colourful and "alive" (graph 19).



***Graph 19** – Music and Emotional Well-being: Amateur vs. Professional Musicians. Source: SINUS, SSSA, CHP (2025).*

These patterns suggest that **amateur musicians** tend to frame music primarily as a resource for **self-care and emotional well-being**, whereas professionals engage with it both emotionally and instrumentally, integrating it into their broader work identities. The difference becomes clearer in therapeutic work. Music therapy is comparatively rare among amateurs (around 2–3%), but more common among semi-professional or full-time musicians (10–12%). This suggests that **professional musicians** more frequently extend their skills into therapeutic or care-oriented roles — not as a primary career path, but as part of a **diversified professional portfolio** within a precarious sector.

2.10 Music and sustainable development

2.10.1 Research questions, literature review summary, and data gaps

***RQ.** How can the environmental, social and governance sustainability of the music industry be measured? Is there a connection between musical participation and pro-environmental attitudes and behaviours? Can musicians contribute to the development of a greener culture?*

The relationship between music and environmental sustainability has gained increasing attention in recent years, as the cultural sector recognizes its role in addressing climate change and promoting sustainable practices. This section examines public perceptions and experiences of environmental sustainability in the music sector across five European countries (Germany, Spain, France, Italy, and Poland, with a combined total sample of n≈6,000), focusing on three key dimensions: (1) **environmental practices at live music events**, (2) **public attitudes toward tying public funding to environmental sustainability efforts**, and (3) **the relationship between public demand and observed practices**.

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The findings presented here are based on survey data collected from representative samples in each country, with respondents who attended live music events in the past 12 months providing insights into their observations and preferences regarding environmental sustainability in music contexts.

2.10.2 Survey findings

Overview of Current Practices

Survey respondents who attended live music events were asked about five specific environmental sustainability practices they observed at their most recent event (M26_1-5). The findings reveal a mixed picture of environmental consciousness in the live music sector, with some practices more prevalent than others.

Waste Management and Recycling. The most observed sustainable practice was the availability of waste recycling facilities, with 58.2% of respondents who remember their last live music event (n=2,443) reporting that waste could be recycled or sorted at the event they attended. This finding suggests that waste management has become a priority for many event organizers. However, significant cross-national variation exists: Spain and Poland showed the highest rate (63%), while Germany had the lowest rate (51%). The relatively high proportion of respondents who did not know or could not remember (24%) indicates that recycling infrastructure may not always be prominently displayed or communicated to attendees.

Single-Use Plastics and Disposables. The persistence of environmentally problematic practices remains evident in the widespread use of disposable items. More than half of respondents (55%, n=2,343) reported that water in disposable bottles was sold at events (M26_2), with particularly high rates in Spain (69%) and Italy (67%), compared to Germany (36%). Similarly, 49% (n=2,048) observed the use of disposable cups and/or plates (M26_1), with Spain again showing the highest rate (59%) and Germany the lowest (41%). These findings indicate that while some progress has been made in waste management, the reduction of single-use plastics remains a significant challenge for the live music sector across Europe.

Environmental Communication and Branding. The explicit promotion of environmental sustainability at music events (M26_4) appears to be relatively limited. Only 32% of respondents (n=1,336) reported that their most recent event was advertised as environmentally sustainable, with considerable variation across countries—from 21% in Germany to 47% in France. Even fewer respondents (24.8%, n=1,039) observed sustainability messages featured in the music itself or in promotional materials such as posters (M26_5). Germany showed particularly low rates (18%), while France had the highest (31%). The high proportion of respondents who did not know or could not remember whether events were advertised as sustainable (31%) or featured sustainability messages (27%) suggests that when such efforts exist, they may not be sufficiently prominent or memorable to register with audiences.

Country-Level Analysis

Germany demonstrates a distinctive pattern characterized by relatively low rates of disposable item usage (41% for cups/plates, 36% for bottled water) but also lower visibility of sustainability messaging (21.3% advertised as sustainable, 17.9% featuring sustainability messages). This may reflect either a pragmatic approach to sustainability that prioritizes concrete actions over communication, or a cultural context where environmental practices are normalized and therefore less explicitly promoted. Note that this analysis is based on a single data source, the survey: qualitative follow-up research (e.g., stakeholder interviews) could shed light on how far these explanations go (as well as to eliminate alternative factors such as underreporting).

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Spain shows high rates across most indicators, including both problematic practices (59% disposable cups/plates, 69% bottled water) and positive ones (63% recycling available, 35% advertised as sustainable). This pattern suggests a music event landscape where environmental issues are increasingly visible and discussed, even if implementation remains inconsistent.

France stands out for having the highest rate of events advertised as environmentally sustainable (47%) and the highest rate of sustainability messages featured at events (31%), alongside relatively high recycling availability (60%). This suggests a more integrated approach to environmental communication in the French music sector.

Italy and **Poland** show similar patterns, with high rates of disposable item usage and bottled water sales, moderate-to-high recycling availability, but relatively low rates of explicit sustainability communication. These findings may reflect ongoing transitions in environmental practices within these countries' music sectors.

Implications for the Live Music Sector

The survey findings reveal several important implications for environmental sustainability in live music:

The Recycling Paradox: While recycling infrastructure is relatively common (58%), the continued widespread use of disposable items (49% cups/plates, 55% bottled water) suggests that waste management strategies focus more on end-of-lifecycle solutions rather than waste prevention. A more sustainable approach would prioritize reusable alternatives and waste reduction at the source.

The Communication Gap: The low visibility of sustainability messaging (25% featuring messages, 32% advertised as sustainable) indicates a missed opportunity for the music sector to leverage its cultural influence to promote environmental awareness. Music events could serve as platforms for environmental education and behavior change, reaching large audiences in contexts where they are emotionally engaged and receptive to messages.

Cross-National Variation: The substantial differences between countries (e.g., Germany at 36% vs. Spain at 69% for bottled water sales) suggest that environmental practices in live music are shaped by national regulatory frameworks, cultural norms, industry standards, and infrastructure availability. This variation points to opportunities for cross-national learning and policy harmonization.

Awareness and Visibility: The high proportions of "don't know/don't remember" responses across all indicators (ranging from 14% to 31% depending on the question and country) highlight the importance of making sustainability efforts more visible and memorable to audiences. This could involve clearer signage, pre-event communication, and integration of sustainability themes into the artistic programming itself.

Public funding tied to environmental sustainability

Beyond observed practices at live events, the OpenMusE survey captured public attitudes toward environmental sustainability in cultural policy. Question M61_4 asked respondents whether they agreed that "public funding should be tied to the recipient's efforts for environmental sustainability." The results reveal substantial public support for environmental conditionality in cultural funding, with important cross-national variation.

Overall Public Support

Nearly half (49%) of European audiences across the four countries with available data support tying cultural funding to environmental sustainability. Spain shows the highest support (59.0%), consistent with the high visibility of both sustainability measures and challenges in musical life. This alignment suggests a coherent

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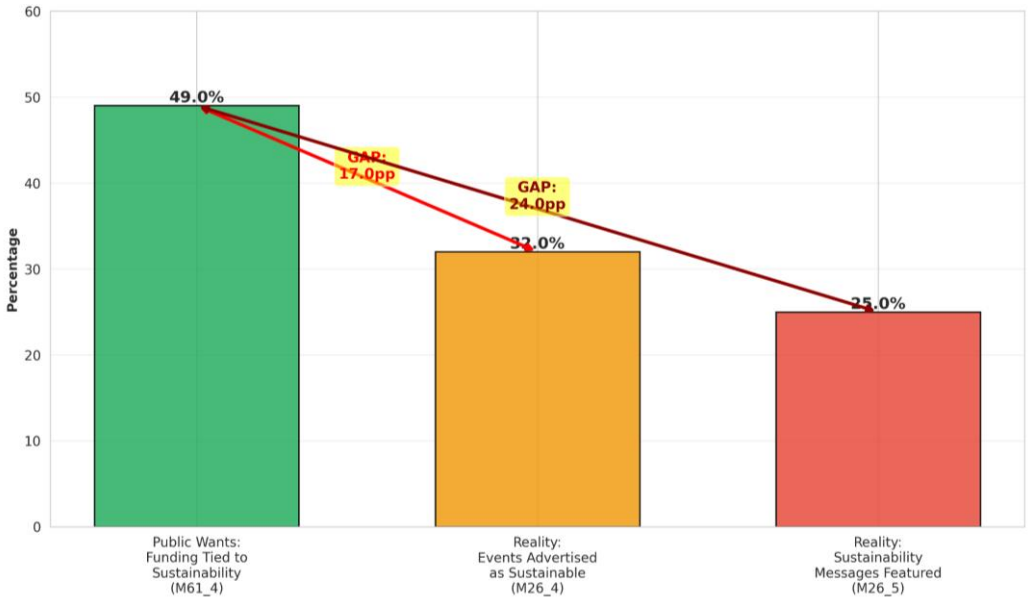
national context where both public attitudes and sector practices reflect environmental priorities. This represents a substantial public mandate for introducing environmental conditionality in cultural policy. The level of support is comparable to other ESG (Environmental, Social, Governance) criteria measured in the survey, suggesting that audiences view environmental concerns as integral to cultural policy, not peripheral.

Demographic Patterns: No Generational Divide

A surprising finding emerges when examining age patterns: support for environmental funding criteria shows remarkable consistency across all age groups. This absence of a generational divide is unusual for environmental issues, where younger generations typically show significantly stronger pro-environmental attitudes. The 50-59 age group shows slightly lower support (45%), while the 16-29 group shows the highest (53%), but these differences are not radical. This pattern suggests that cultural funding policy may be viewed as a governance and policy domain rather than purely an environmental issue, transcending typical generational divides on climate concerns.

The Attitude-Communication Gap

A critical finding emerges when comparing attitudes towards public funding tied to the recipient's efforts for environmental sustainability (M61_4) with observed sustainability communication (M26_4-5): while 49% of audiences support tying funding to environmental sustainability, significantly fewer observe events advertised as sustainable (32%, M26_4) or featuring sustainability messages (25%, M26_5)."



***Graph 20** – Attitude-Practice Gap in Environmental Sustainability. Source: SINUS, SSSA, CHP (2025).*

The 17.0 to 24.0 percentage point gaps between public demand and observed sustainability communication indicate that the live music sector is substantially underdelivering on environmental communication relative to audience expectations. This disconnect has several possible explanations:

- **Practices exist but aren't communicated**: Events may implement sustainable practices (evidenced by 58% having recycling) but fail to make these efforts visible to audiences through advertising or messaging.

- **Practices don't exist at scale**: The sector may not have widely adopted sustainable practices beyond basic waste management, leaving little to communicate.
- **Communication is ineffective**: Sustainability messaging may exist but not be prominent, memorable, or compelling enough to register with audiences (evidenced by high "don't know" responses).
- **Audience expectations exceed current capacity**: The 49% support for funding criteria may reflect aspirational values that the sector has not yet operationalized.

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3 Discussion

The findings of the OpenMusE cross-national survey confirm that music remains **a core social, cultural, and civic resource** across Europe, while also revealing persistent inequalities in access, participation, and recognition. What matters most across domains are **life stage, socio-economic position, and subjective engagement with music**—factors that together shape how individuals and communities participate in, value, and benefit from musical life.

3.1 The broad extra-economic value of music

Results from Section 2.3 (Music and Social Life) provide robust empirical evidence that music continues to structure social relationships across Europe—from family traditions and community events to interpersonal sharing and friendship formation. While the intensity and form of engagement vary across countries, generations, and levels of musical activity, **music functions as a key driver of social connectedness and community cohesion**, offering a shared language that transcends class and geography.

At the same time, these patterns reveal **unequal access**: younger, more educated, and higher-status respondents participate more frequently and diversely, suggesting that **musical participation reflects and reproduces broader social stratifications**. However, these findings should be interpreted with caution. The survey provides a **cross-sectional snapshot** of musical life, meaning that it captures relationships at a single point in time and cannot track long-term social effects or causal mechanisms. Future research should include **longitudinal and qualitative approaches** to better understand how sustained participation in music influences community cohesion and social capital.

3.1.1 Cultural rights and inclusion

From a civic perspective, Section 2.5 (Music and Human Rights) underscores the widespread **public endorsement of music as a human right**. A clear majority across all five countries support the principles of free access to musical expression, learning, and participation, as well as fair working conditions for cultural workers. This broad consensus reflects a shared belief that participation in cultural life is a fundamental dimension of democratic citizenship. However, persistent challenges remain regarding **freedom of expression, diversity, and inclusion**—particularly concerning the visibility of marginalised artists and the uneven implementation of rights-based cultural policies. These findings align closely with the diversity and inclusion goals and indicators developed in **OpenMusE WP2**, suggesting that equitable participation in music is not only a matter of cultural vitality but also of social justice. Yet the CAWI survey primarily measures **attitudes rather than behaviours**: while citizens express strong normative support for cultural rights, the dataset offers limited insight into how such attitudes translate into actual practices or policy outcomes. Capturing these dynamics would require mixed-method approaches that connect self-reported values with institutional and behavioural data.

3.1.2 Creativity and labour in the informal music economy

Section 2.7 (Musical Creation – Commercial) highlights the **complex boundary between amateur and professional musicianship**. The data depict a creative landscape dominated by amateurs and hobbyists, who represent around 80% of active musicians and engage in music mainly for emotional and personal fulfilment. Semi-professional and professional musicians, by contrast, participate in a **portfolio-based labour market**,

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combining performance, teaching, production, and technical work—often under precarious economic conditions. Country differences, such as Poland's relatively high share of self-declared professionals, point to emerging yet fragile creative economies characterised by intermittent income and self-employment ((Ilczuk, Karpińska, Cholewicka 2024). These findings reinforce earlier studies on **cultural precarity** while also revealing the **resilience and adaptive creativity** of Europe's musical workforce. Nevertheless, this aspect of the dataset faces **sampling limitations**. Professional musicians constitute a relatively small subgroup, limiting the robustness of some country-level comparisons. Moreover, informal exchanges, transnational activities, and non-institutional creative networks — central to Europe's contemporary music economy — remain difficult to capture through survey methods alone. Addressing these gaps will require **integrating administrative data, case studies, and platform-based metrics** into future research on musical labour.

3.1.3 Participation and monetisation in musical life

As shown in Section 2.8 (Participation in Musical Life), **musical engagement in Europe is nearly universal**, yet only partially monetised. A large share of activity takes place through **free, subsidised, or informal channels**—community concerts, non-ticketed festivals, and household streaming arrangements—reflecting a hybrid ecosystem in which social participation and cultural policy interact. While ticketed events and recorded music sales capture only part of the musical economy, ancillary expenditures on travel, hospitality, and local services demonstrate that music's broader economic footprint extends well beyond the cultural sector itself. These patterns call for **new measurement frameworks that complement market-based metrics with behavioural and contextual indicators** capturing music's full social and economic value. However, since the OpenMusE data rely on **self-reported participation and expenditure**, they are subject to recall and social-desirability bias, and cannot capture the full granularity of informal or non-monetised activities.

3.1.4 Music, health, and well-being

Findings from Section 2.9 (Music, Health, and Well-Being) confirm that Europeans frequently use music for emotional regulation, stress relief, and everyday psychological balance. Amateur musicians, in particular, report strong emotional attachment to music and view it as a key resource for self-care. While these results underscore music's broad **affective and psychological significance**, the well-being indicators in the dataset remain relatively **general and perception-based**. They capture whether people use music to improve mood or manage stress but not the **intensity, duration, or clinical impact** of such experiences. Nor can they differentiate between passive listening and active engagement in therapeutic contexts. As such, future research should expand these measures using **validated psychometric and longitudinal tools**, enabling a fuller understanding of how music contributes to mental health and resilience over time.

3.1.5 Music, sustainability, and policy gaps

The analysis of Section 2.10 (Music and Sustainable Development) points to both **public support and data limitations** regarding the social dimension of sustainability. In particular, M63_15 (support for vouchers enabling students and low-income individuals to attend events) and M63_16 (support for free music education in schools) can be interpreted as social sustainability indicators — reflecting public endorsement of equitable cultural access and inclusion.

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To contextualise environmental sustainability within broader policy priorities, the survey also included questions on other **ESG-related cultural funding criteria** (M61 series). Comparing public support across these dimensions reveals how audiences prioritise different values in cultural funding.

Funding Criterion	Question	% Support (TOP 2)	ESG Dimension
Decent working conditions for artists	M61_7	59 %	Social
Against ethnic/cultural discrimination	M61_6	50 %	Social
Environmental sustainability	M61_4	49 %	Environmental
Against gender discrimination	M61_5	48 %	Social

***Table 3** – Public Support for ESG-Related Cultural Funding Criteria. Source: SINUS, SSSA, CHP (2025).*

Key Findings from ESG Comparison highlights that:

- **Working conditions receive highest priority** (58.7%), reflecting widespread concern about precarity in the cultural sector. This aligns with broader European policy attention to fair work conditions for artists.
- **Environmental sustainability** (49.0%) **receives comparable support to social equity measures** (48.1-49.6%), indicating that audiences view environmental concerns as equally important to anti-discrimination efforts. This challenges assumptions that environmental issues are secondary to social concerns in cultural policy.
- **Integrated ESG approach has public mandate**: Support across all four dimensions ranges from 48-59%, suggesting audiences favor a holistic approach to values-based cultural funding rather than privileging one dimension over others.
- **Environmental criteria are mainstream, not niche**: With 49% support, environmental conditionality is not a fringe concern but a mainstream policy preference comparable to established criteria like anti-discrimination measures.

3.1.6 Cross-cutting insights and implications

Taken together, the CAWI survey provides a comprehensive picture of music as a multi-dimensional ecosystem—social, economic, civic, and affective. Several overarching insights emerge:

- **Music as a public good:** Broad support for public cultural funding across political orientations, free music education, and the right to cultural participation confirms that citizens see music as a collective rather than purely private value.

- **Persistent inequalities:** Access to learning, discovery, and creation still correlates strongly with education, income, and perceived social status.

- **Hybrid cultural economies:** Informal and non-monetised participation sustain the vitality of musical life but also obscure its economic contribution.

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- **Resilience and diversification:** Musicians navigate a hybrid professional landscape that balances creative fulfilment with economic precarity, often extending into adjacent sectors such as education, digital media, and therapy.

- **Policy opportunities:** Integrating cultural rights, inclusion, and sustainability frameworks can help align music policy with broader European goals for social cohesion and green transformation.

3.2 Framework for future research: The Social-Ecological Systems Framework (SESF)

3.2.1 Operationalising “music ecosystems”

Building on the conceptual proposal outlined in **D3.1 "*Music, Society, and Citizenship: Methods and Indicators*"** and further developed in D3.4 "*Comprehensive Indicators for the Assessment of European Music Ecosystems*," the Social-Ecological Systems Framework (SESF - shown below in **Figure 2**) offers a structured lens through which to interpret the survey findings. The SESF, developed by Nobel Prize-winning economist Elinor Ostrom, provides an analytical architecture for understanding complex systems where social and ecological elements interact dynamically (Ostrom, 2009; McGinnis & Ostrom, 2014; cf. Edwards 2023; Edwards, forthcoming; Edwards, Cernigliaro, & Cholewicka, forthcoming).

A core aim of WP3 Music, Society, and Citizenship has been to develop "a framework to map and measure" the diverse components of music ecosystems in Europe. In parallel to our project, the Music Moves Europe initiative pursued the same aim, culminating in the publication of a formal definition of “the European music ecosystem” (2024). The Music Moves Europe definition is eminently compatible with Ostrom's SESF.

OpenMusE D3.4 builds on this synergy, applying the SESF to the test case of urban live music scenes studied in the OpenMusE live music census. Based on that application, D3.4 recommends adopting the SESF as a framework for indicator development and policy strategy across different music sub-sectors and use cases.

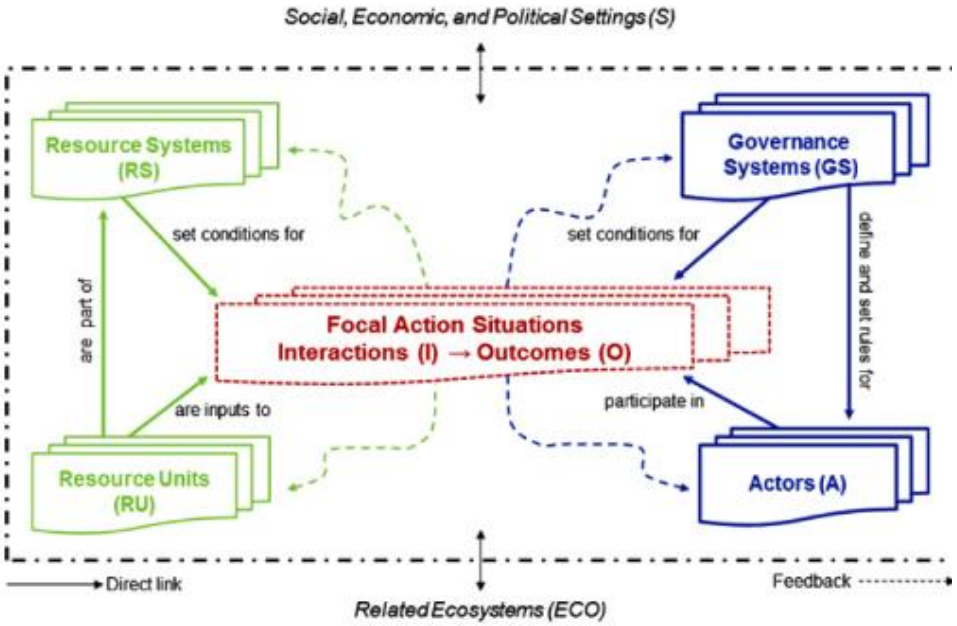

***Figure 2** – Social-Ecological Systems Framework (SESF). Source: Ostrom, 2009.*

3.2.2 From survey findings to music ecosystem indicators

The T3.2 survey findings demonstrate the analytical value of the Social-Ecological Systems Framework (SESF) for structuring research on music ecosystems. The SESF allows the integration of actor data, governance system data, and resource system data into a single analytical lens. Figure 3 provides an example of a selection of indicators fitted to social-ecological sub-systems in columns and music-behavioural categories in rows (based on the ICET model: cf. D3.1, Section 1.1 and D3.4, Section 3.3). *The selection of indicators is provisional, and specific indicators could be substituted based on data user needs – numerous alternative indicators are available in this survey dataset alone*.

Rows: ICET model	**Columns: indicator candidates representative of SESF first-tier categories**			
	Actors	**Resource systems**	**Governance**	**Interactions**
Information (e.g., music education and music discovery)	Percentage of population that **studied music** in primary school (61%), lower secondary school (58%), upper secondary school (31%)	Recorded music resource systems – perceived **importance of music discovery channels**: radio (29%), streaming (27%), social media (21%) Live music resources – perceived **importance of live events for music discovery** (21%)	Percentage of population that agrees **all children and adults should have the opportunity to learn music**: 78% Percentage of population that supports transparency enforcement for streaming platforms: 45%	Percentage of **streaming users that use manual searches** (80%), automated playlists (35%), manually curated playlists (34%)
Communication and community	Percentage of population who see **music as an important part of life** in their family (55%) or community (45%), who identify with a musical subculture (40%), or who have met some of their best friends through music (32%) Percentage of population who **feel more connected through music** to people from different cultural backgrounds (55%), their own cultural background (50%), their country of residence (41%), Europe (37%)	Recorded music resource systems – percentage of **streaming users who discover more music** in general (52%), more music from their home country (47%), more music from other European countries (47%) Live music resource systems – percentage of **live music audiences who most enjoy seeing live music in small venues** (54%), medium-sized venues (24%), large venues (21%)	Percentage of population that **support requiring streaming and ticketing platforms to invest in local artists** and venues: 50%, 51% (respectively) Percentage of population that **support broadcasting quotas** on artists from their country (46%), emerging artists (46%), artists from diverse regions of their country (44%), female artists (39%), ethnic/cultural minority artists (36%)	Percentage of population that attended **at least 3-5 live music events** in the last 12 months: 48% Percentage of population that **remembers the last gig they attended**: 83% Percentage of population that **attended their last gig: with friends** (39%), with family (30%), with a romantic partner/date (20%), alone (9%)

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Enjoyment and expression	Percentage of population who have **played a musical instrument or sung** in the last 12 months: 30% Percentage of **self-identified musicians** who identify as: amateur (80%), semi-professional (15%), professional (5%)	Percentage of self-identified musicians who have **spent money on musical goods** and services: 53% Percentage of population who have made **any income from musical activities** in the last 12 months: 12%	Percentage of population that agree that **musical expression should not be censored** (70%), musicians should express themselves on political topics (53%)	Percentage of population who see **music as important to quality of life**: 71% Percentage of population who see **live music as important** to them: 47%

Figure 3 *– Social-Ecological Systems Framework (SESF) applied to music, society, and citizenship. Source: Ostrom, 2009.*

A wider range of music ecosystem indicators can be made available through data fusion. OpenMusE deliverable D1.5 demonstrates this. In D1.5 Section 1, the CAWI and CAPI survey microdata (reported in this deliverable) on concert attendance and expenditure on tickets, transport, hospitality, and merchandise are combined with national statistical and/or CMO data on total live music attendance. Each category of spending is then mapped to standard industrial classifications to enable linkage with national accounting data. This provides a basis for estimating the gross value added (GVA) and full-time equivalent (FTE) employment contribution of gig attendance in France, Germany, Hungary, Italy, Poland, Slovakia, and Spain.

3.2.3 Advancing the social-ecological systems perspective on music

While the survey provides valuable data for SESF analysis, its findings also suggest that the following **critical components of music ecosystems require further operationalization**, particularly in relation to informal practices, digital infrastructures, and multi-level governance.

- Temporal dynamics: Cross-sectional survey data provides a snapshot but cannot capture ecosystem evolution, feedback loops, or tipping points that SESF theory emphasizes (see forthcoming work by Frank Kimenai).
- Multi-level governance: The survey captures public attitudes toward national funding criteria (M61_4) but not how EU, national, regional, and municipal governance levels interact to shape sustainability outcomes; it recognises that governance systems involve contestation and power relations, but the survey does not directly measure conflicts within music ecosystems (e.g., between profit motives and environmental goals, or between different stakeholder groups).
- Informal sustainability practices: The survey captures formal, visible sustainability practices (recycling infrastructure) but not informal sustainability efforts (artist carpooling, DIY venue initiatives, grassroots organizing) that may be significant in music ecosystems.
- Ecological outcomes: The survey measures practices and communication but not actual environmental impacts (carbon emissions, waste generated, resource consumption), limiting ability to assess outcome effectiveness.

Future applications of the social-ecological systems framework to music would benefit from:

- Mixed-methods designs: Combining survey data with qualitative case studies of specific music ecosystems (venues, festivals, cities) to capture informal practices, power dynamics, and governance conflicts (cf. Edwards, Cernigliaro, & Cholewicka, forthcoming).

- Longitudinal data: Repeating measurements over time to track ecosystem evolution, test policy interventions, and identify feedback loops and tipping points.
- Multi-level analysis: Explicitly mapping how EU, national, regional, and local governance interact to shape sustainability outcomes, including policy diffusion and regulatory conflicts.
- Outcome measurement: Developing indicators for actual environmental impacts (carbon footprint, waste reduction, resource efficiency) alongside practice and communication measures.
- Comparative ecosystem analysis: Studying different music sub-sectors (live music, recorded music, music education) and contexts (urban/rural, commercial/subsidized) to identify which SESF configurations produce better sustainability outcomes.
- Intervention evaluation: Using SESF as a framework to design and evaluate policy interventions, tracking how changes in governance systems (e.g., funding criteria) ripple through actors and resource systems to produce outcomes.

3.3 Recommendations to improve data collection and evidence-based policymaking on music, society, and citizenship in Europe

Based on our T3.2 data collection experience, the OpenMusE Consortium strongly recommends prioritizing the establishment of harmonized European data collection on cultural access and participation, the revision of statistical systems to make cultural sectors more visible, and the creation of infrastructures, incentives, and forums for sharing confidential data on live and recorded music alike. Our core recommendations for uptake, transfer, and scaling are shared with D1.5, and are:

- Integration of the findings presented in this report and D1.5 directly into the planned 2027 Report on the State of Culture in Europe (cf. Culture Compass for Europe (COM(2025) 785 final).
- Commitment to yearly or bi-yearly cross-EU surveying on cultural access and participation within the data collection agenda of the planned EU Cultural Data Hub.
- Integration of the OpenMusE question batteries on live music attendance, live music expenditure, and recorded music use into the above cultural access and participation survey questionnaire.
- Formation of a stakeholder advisory board for the EU Cultural Data Hub including 1) representatives of Eurostat and major national statistics institutes; 2) curators of data on live music attendance (e.g., CMOs, venue associations); and 3) curators of revenue data (e.g., CMOs).
- Integration into the EU Cultural Data Hub of a data space architecture that would enable the secure and legally compliant sharing of the above proprietary data under a system of variable permissions – e.g., the Open Music Observatory architecture (cf. D2.3, D5.7).

Taking these steps would allow the EU Cultural Data Hub team to regularly assess both the broad societal and cultural value of music and the economic value generated by live and recorded music in Europe.

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Conclusion

The findings from the CAWI survey substantially extend the conclusions of D3.1, which identified **music as a key driver of social cohesion, civic engagement, and cultural participation**, while highlighting major data gaps. The survey fills several of these gaps by providing comparative, population-level evidence on music education and discovery, music in social and cultural life, music policy, the "right to music", and the sustainability of music ecosystems, among other topics.

- **The "music ecosystem" concept is a lens that is relevant to reality and useful for research.** The results empirically substantiate emerging policy concepts such as music ecosystems and culture as a driver of sustainability and citizenship (see section 1.2 of this report). The strong public endorsement of tying cultural funding to decent working conditions, environmental responsibility, and inclusion aligns with recent EU frameworks, including Music Moves Europe and the Creative Europe Greening Strategy, which increasingly frame music policy in ecosystemic and ESG terms.
- **Music ecosystems are sustained by informal and non-commercial practices.** The survey demonstrates that Europe's music ecosystems rely heavily on informal, non-commercial forms of musical engagement. High levels of private practice, amateur creativity, and unpaid participation form a broad reservoir of skills, identities, and cultural attachment that underpins both future professional pathways and audience development. This confirms that ecosystem resilience depends not only on market actors, but on sustained everyday participation.
- **Ecosystem participation is widespread, but unevenly monetised.** While musical participation is nearly universal, monetisation remains partial and socially patterned. Live attendance, listening, and creative engagement occur frequently without direct financial transactions, reinforcing the importance of zero-price and subsidised cultural infrastructures. These hybrid participation modes challenge market-centric policy assumptions and call for valuation frameworks that recognise non-monetised cultural value.
- **Music value networks are non-linear.** The findings also resonate with the scientific literature update, particularly research emphasizing the relational, networked, and systemic nature of music ecosystems (see section 1.3 of this report). Survey evidence on social sharing, community participation, and cross-cultural discovery supports the shift away from linear value-chain models toward interconnected value networks, as highlighted in both policy and academic debates.
- **Inequalities shape access to music ecosystems across the life course.** The data reveal persistent inequalities in access to musical participation, education, and income generation linked to age, socio-economic status, and financial security. Younger cohorts are more active and experimental, while older and economically constrained groups face cumulative barriers. Ecosystem approaches must therefore integrate social equity and life-course sensitivity as core policy dimensions.
- **Portfolio work and blurred professional boundaries are structural features.** The survey confirms that blurred boundaries between amateur, semi-professional, and professional musicianship are not transitional anomalies but structural features of contemporary music ecosystems. Portfolio careers, diversified income sources, and intermittent earnings dominate, highlighting the need for governance systems that accommodate hybridity rather than relying on binary labour classifications.
- **Inclusion and equity within music need systematic actions.** At the same time, the data challenge overly optimistic assumptions about automatic inclusivity or sustainability. Inequalities in access to

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education, discovery, and participation suggest that ecosystem approaches must explicitly address distributional and governance dimensions, not only environmental or technological ones.

- **The music ecosystem is a social infrastructure.** Beyond economic activity, music operates as a form of social infrastructure supporting emotional regulation, social connection, and everyday well-being. Strong links between musical engagement, quality of life, and community participation position music policy as relevant not only to culture and industry, but also to health, social inclusion, and urban policy domains. Sustained investment in music education — particularly beyond compulsory schooling — and support for informal and community-based learning emerge as central levers for long-term ecosystem sustainability.

For practitioners and institutions, the findings point to opportunities to strengthen bridges between formal, informal, and digital musical spaces, and to design participation pathways that remain accessible across life stages. The strong public support for linking funding to social and environmental criteria provides a legitimacy base for integrating ESG principles into cultural funding schemes. In terms of urban and regional policy, the evidence reinforces the role of local music scenes, venues, and community practices as sites of social cohesion and well-being, suggesting that music policy should be more closely aligned with urban development, health, and social inclusion strategies (van der Hoeven & Hitters, 2023).

In conclusion: this report, based on representative data, offers the first recent comprehensive portrait of musical life in Europe. The OpenMusE Consortium strongly recommends its integration into the forthcoming 2027 *Report on the State of Culture in Europe* (cf. Cultural Compass (COM(2025) 785 final) (cf. Edwards 2025). The Consortium furthermore recommends that its constituent data collection instruments and data analysis and management tools be adopted by the EU Cultural Data Hub in order to ensure adequate representation of data on music consumption, music-making, attitudes toward music, and attitudes toward cultural policy more generally.

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Annex 1: CAWI survey materials (DE, ES, FR, IT, PL)

The CAWI survey materials are available in an open-access repository at:
https://github.com/openmusiceurope

This includes:

- English-language master questionnaire
- Questionnaire translations used for programming
- Quotas on age, education, and gender used in each country, along with sources used to set quotas
- Fieldwork metadata collected in each country
- Within-country weights (v1) and necessary calculations
- Population weights (v1) and necessary calculations
- Dataset and documentation
- Cross-tabulations and other supplementary reporting

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Annex 2: CAPI survey materials (HU, SK)

The CAPI survey materials are available in an open-access repository at:
https://github.com/openmusiceurope

This includes:

- English-language master questionnaire
- Questionnaire translations used for programming
- Fieldwork method reports provided by Kantar-Hoffman, including settlement lists and quotas
- Dataset and documentation
- Cross-tabulations and other supplementary reporting

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Annex 3: Social-Ecological Systems Framework variables

For a brief overview, see this blog post. For details, see Edwards (forthcoming) and Edwards, Cernigliaro, and Cholewicka (forthcoming).

Tier-one category	Variable	Variable description
Social, political, and economic settings	S1	Economic development
	S2	Demographic trends
	S3	Political stability
	S4	Other governance systems
	S5	Markets
	S6	Media organisations
	S7	Technology
Resource systems	RS1	Sector
	RS2	Clarity of system boundaries
	RS3	Size of resource system
	RS4	Human-constructed facilities
	RS5	Productivity of system
	RS6	Equilibrium properties
	RS7	Predictability of system dynamics
	RS8	Storage characteristics
	RS9	Location
Resource units	RU1	Resource unit mobility
	RU2	Growth or replacement rate
	RU3	Interaction among resource units
	RU4	Economic value
	RU5	Number of units
	RU6	Distinctive characteristics
	RU7	Spatial and temporal distribution
Governance systems	GS1	Government organisations
	GS2	Nongovernment organisations
	GS3	Network structure
	GS4	Property-rights systems
	GS5	Operational rules
	GS6	Collective-choice rules
	GS7	Constitutional rules
	GS8	Monitoring and sanctioning processes
Actors	A1	Number of relevant actors
	A2	Socioeconomic attributes
	A3	History or past experiences
	A4	Location
	A5	Leadership/entrepreneurship
	A6	Norms (trust-reciprocity)/social capital
	A7	Knowledge of SES/mental models
	A8	Importance of resource (dependence)

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	A9	Technologies available
Interactions	I1	Harvesting
	I2	Information sharing
	I3	Deliberation processes
	I4	Conflicts
	I5	Investment activities
	I6	Lobbying activities
	I7	Self-organising activities
	I8	Networking activities
	I9	Monitoring activities
	I10	Evaluative activities
Outcomes	O1	Social performance measures (e.g., efficiency, equity, accountability, sustainability)
	O2	Ecological performance measures (e.g., overharvested, resilience, biodiversity, sustainability)
	O3	Externalities to other SESs
Related ecosystems	ECO1	Climate patterns
	ECO2	Pollution patterns
	ECO3	Flows into and out of focal SES

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