

Jaap Gordijn, Roel Wieringa, February 2026

## “Music360: A New Perspective On The Value Of Music”

### 1. Executive summary

The Music360 project identified a significant research gap concerning the broader economic and societal impact of the public performance of music. The work that has been undertaken provides the first comprehensive and evidence-based insight into the **value of the public performance of music**. Over three years, the project has demonstrated that music contributes measurable value not only to the creative sector but also to the retail, hospitality, and health environments in which it is played.

The project has shown that **data-driven understanding of public performance** is necessary for informed decision-making, not only in the cultural sector but also across a range of other disciplines. It highlights the importance of **continuing to collect and analyse impartial, transparent data** across Member States to support a sustainable European music ecosystem and improve policy-making. In this context, “data” refers to core metadata identifying rightsholders, usage data capturing how music is actually used, as well as analytical data including evidence generated through experimental and pilot studies. Music360 is suitable as the foundation for one element of a European Cultural data hub about music and requires a public-private partnership with the appropriate funding to bring the platform to its full potential.

Some key project findings are:

Finding 1. Our empirical research has shown that music has economic, societal, and cultural value for many stakeholders.

Finding 2. There is a desire to consolidate more detailed information specific to the music sector, but no individual actor has the resources to develop this on their own or the capacity to do it at the EU level.

Finding 3. It is possible to create a decentralised data and knowledge sharing platform where data control remains with the data owner for the benefit of understanding the value of music.

Finding 4. Valuable data exists and can be aggregated across the EU, but it is not publicly available. Inclusion of this data within the cultural data hub would allow commercial users (shops, bars, etc.), music makers, and policymakers to benefit from this.

Based on these findings, Music360 makes three primary policy recommendations:

- (i) The creation of a dedicated music subsection within an EU Cultural Data Hub**
- (ii) Establish an exploratory group of key stakeholders to further develop a data and knowledge sharing platform, focused on the economic and societal impact of music, including music generated using AI.**
- (iii) Put the recognition and the safeguarding of the economic and social added value of music at the heart of an integrated and data-based EU cultural policy.**

Combined, these recommendations would lead to a permanent, industry-wide, and evolving source of data which would allow key players in the music ecosystem and policymakers to make decisions based on fact, not supposition, and take into account the rapid speed of technological advances. With the exponential growth of AI and its impact on cultural heritage and society, these recommendations are timely and important.

## **2. The importance of data in times of radical technological change**

Reliable, informative, and relevant data on public performance usage can help the music sector evolve gradually and adapt to new realities, rather than being forced to resort to (frequently disruptive) legislative measures.

Such data cannot ignore emerging technologies, such as generative AI, and whether it will influence the current music ecosystem - both as a potential complement to - and competitor with - human creativity. However, this discussion must build upon the proven value of human-created music in public performance contexts.

GenAI brings with it threats and opportunities that may have a profound impact in the area of public performance. To assess this impact, and considering its global and geopolitical reach, data is needed not only for policymakers in the cultural sector, but also those in sectors as diverse as finance and international relations.

Over the past three years, we have assessed *“the value of music”* and discovered a multitude of new information and data. In addition to building on this work, we now also need to know *“what is the value of music in the era of GenAI?”*

## **3. Policy recommendations – Reliable data makes good policy**

### **(i) The creation of a dedicated music subsection within an EU Cultural Data Hub.**

There is a need for a permanent body to be created, responsible for supplying the entire music ecosystem with reliable independent data on all relevant aspects. The recent proposal in the Culture Compass for Europe to create an EU Cultural Data Hub and its stated aim to *“collect and analyse cultural data, synthesise evidence, monitor trends and developments, and pool best practice”* is fully supported by Music360. However, our research shows that music has very specific elements that must be analysed in a granular manner. For that reason, a specific subsection dealing solely with music should be created within the hub, with the aim of sharing the data collected with the wider cultural sector.

**(ii) Establish an exploratory group of key stakeholders to further develop a data and knowledge sharing platform, focused on the economic and societal impact of music, including music generated using AI.**

Their task should be to build upon the research of the Music360 project, which provided evidence of the added value that the public performance of music creates, and should continue to assess how it impacts upon parties tangential to the traditional music industry, such as the retail, entertainment, and health sectors. In particular, it should assess the value of human-created music when it is being challenged by the presence of music created by GenAI. This group should focus on ensuring the interoperability of the data and knowledge sharing platform with future work being conducted on the EU Cultural Data Hub.

**(iii) Put the recognition and the safeguarding of the economic and social added value of music at the heart of the global EU cultural policy.**

Music creates measurable economic and societal value across multiple environments, including retail, hospitality, and health settings. Music360 provides the means to carry out this measurement. As EU policy increasingly engages with digital transformation and the emergence of generative AI, this evidence needs to be reflected at the centre of the EU's global cultural strategy. Recognising and safeguarding the added value of music would ensure that cultural, industrial, and technological policies incorporate its proven cross-sectoral contributions and protect the role of human creativity in rapidly changing environments.

#### **4. Evidence and analysis**

**Finding 1. Our empirical research has shown that music has economic, societal, and cultural value for many stakeholders.**

Figure 1 provides an overview of the results of the living labs executed in Music360. We have various quantitative and qualitative experiments in stores, shopping malls, and venues in the hospitality sector.

In the Netherlands, we have investigated the effect of slow music versus fast music on revenue and employees. Although supposed otherwise, slow music does not increase overall turnover, but it increases sales amongst loyalty program customers of the shop. This leads to the observation that (slow) music should be paired with engagement-enhancing tactics. Also, specifically, if employees have some influence on what is played, a higher level of employee satisfaction is achieved. Similarly, slow music has a positive impact on employees. This leads to the conclusion that slow music is a low-cost tool to improve employee well-being and to create a more positive in-store climate.

The experiments in Finland were done at bookstores, shopping centres, and a grocery store. In the bookstores, commercially licensed music led to a 12% sales growth, as compared to "royalty-free" music. In shopping centres, well-branded music resulted in a higher customer experience and higher-than-planned spending (41.3%). In the grocery store, commercially licensed music caused 1% sales growth, compared to royalty-free music. An experiment with a nationwide retailer in the construction and renovation products field showed that commercially licensed music was perceived as significantly more pleasant and a better fit for the brand than royalty-free music. Also, staff reported a more positive work atmosphere. It was also shown that music alone does not necessarily drive additional purchases, but a good fit with the store environment does.

In Ireland, a qualitative study was conducted concerning the value of music in the hospitality sector. We found that the right music has a positive effect on the staff's energy and focus. Moreover, visitors stayed longer, resulting in higher spending. Live music reinforces the effect. Also, the number of repeated visits increased. During the execution of the Music360 project, we have cooperated with Gesellschaft für musikalische Aufführungs- und mechanische Vervielfältigungsrechte (GEMA) (the German authors' rights society). They performed a quantitative investigation concerning the effect of music on the revenue of entities in the hospitality sector. Their findings correspond to the results of Music360.

In Spain, several experiments were performed. We investigated the effect of music on society, specifically during cultural festivals. Music triggered nostalgia, excitement, and happiness. It also contributed to the identity of persons. Also, experiments were done in a large supermarket chain. Here, we saw deeper emotional brand ties as a result of the right music and an enhanced shopping experience. Finally, we did a unique experiment in a hospital, with cancer patients exposed to chemotherapy. Live music was available during therapy sessions. There was significant improvement concerning tiredness, drowsiness, anxiety, and well-being.

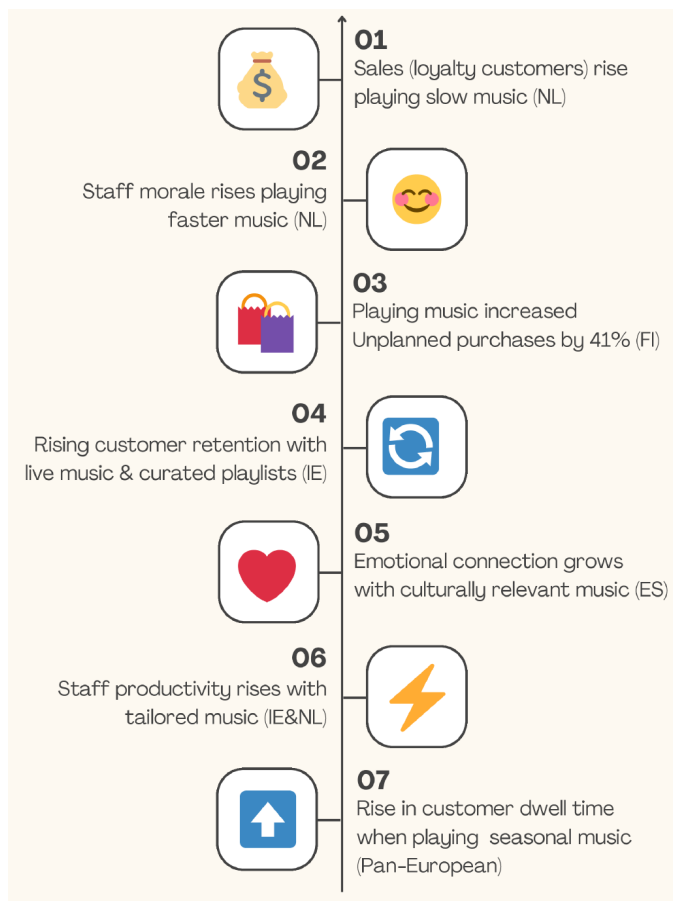


Figure 1: Living lab results

**Finding 2. There is a desire to consolidate more detailed information specific to the music sector, but no individual actor has the resources to develop this on their own or the capacity to do it at the EU level.**

We held several workshops and meetings concerning follow-up research regarding the value of music and the production-level deployment of the Music360 platform. There were sessions with the collective management organisations (CMOs) and their European Association (AEPO-ARTIS) in the project, as well as with the umbrella organisations Societies' Council for the Collective Management of Performers' Rights (SCAPR) and the International Confederation of Societies of Authors and Composers (CISAC). Moreover, we had meetings with stakeholders in the field, for example, BAM!/Pop authors in the Netherlands, EuroSonic Noorderslag Groningen, the Reeperbahn festival in Hamburg, Westway lab in Portugal, a workshop on music value in Estonia, and finally GEMA, the German CMO for music authors.

All these interactions showed a significant interest in the research about the value of music and the corresponding platform. However, there is no single entity that brings together the interests of performers and authors at the international level. For example, the cooperation between SCAPR (performer rights) and CISAC (author rights) is limited. The fact that data about (the value of) music is not addressed in a well-integrated way, and at the international level, hinders the study of the value of music, and consequently the interests of creative entities and the professional users of music. Moreover, this will not be solved by parties like SCAPR and CISAC (and the individual organisations they represent) themselves, because by definition, they only represent a part of the music sector. This is a kind of market failure that can only be addressed at the EU policy level.

**Finding 3. It is possible to create a decentralised data and knowledge sharing platform where data control remains with the data owner for the benefit of understanding the value of music.**

A critical requirement regarding a platform integrating data about (the value of) music is that each party (for example, a rightholder) can stay in control of its own data. Music360 has demonstrated that this is very well possible. The Music360 solution is a highly decentralised platform, where each data provider can control which data is viewable by whom. Moreover, an industry-level decentralised authentication infrastructure has been developed, which not only allows parties to enforce their own requirements with respect to data access but also serves as a blueprint for a uniform and standardised solution for authentication in the music sector.

We also developed secure multiparty computing applications to allow untrusted parties to perform calculations on the data (for example, to calculate the average revenue per genre, region, etc.), without disclosing the raw data to these untrusted parties.

**Finding 4. Valuable data exists and can be aggregated across the EU, but it is not publicly available. Inclusion of this data within the cultural data hub would allow commercial users (shops, bars, etc.), music makers, and policymakers to benefit from this.**

The Music360 platform can be the basis for a European cultural data hub on music, integrating various perspectives and stakeholders. Currently, such an industry-level hub does not exist. However, to make this reality, a public-private partnership has to be established (e.g., with SCAPR and CISAC), with the appropriate funding.

## **Methodology**

Our insights into the value of background music were obtained by conducting field experiments in living labs. We collected data about the relation between background music playlists on the one hand, with sales data, customer experience, and employee experience in a number of retail shops across Europe and in hospitality. Data was collected by means of interviews, questionnaires, devices installed by Barcelona Music and Audio Technologies (BMAT), and information provided by background music providers. The experiments were conducted by the CMOs in the project.

The results are restricted to background music and depend on the sector of the economy where background music is played. Newer developments like the use of AI-generated music have not yet been studied. Our studies need to be replicated across different sectors and need to be extended to the use of AI-generated music.

To produce our results about a decentralised data and knowledge sharing platform, we used a design science approach. The Universitat Politècnica de València, Vrije Universiteit Amsterdam, BMAT, and The Value Engineers collaboratively developed the prototype and tested it on realistic data received from the participating CMOs. The tests validated the feasibility of the platform. The next step should be scaling up the prototype to more European CMOs.

## **5. Sources**

- All publications to date of the project are available at <https://music-360.eu/publications/>.
- The publicly available deliverables are available at <https://music-360.eu/deliverables/>.

## **6. Contact details**

To get in touch for follow-up, please contact Dr. Jaap Gordijn at [j.gordijn@vu.nl](mailto:j.gordijn@vu.nl).