



**DISCOVERABILITY:
A KEY CONCEPT
FOR CULTURAL
DIVERSITY ONLINE**

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European Coalitions for Cultural Diversity

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What is discoverability?

A TV show that appears continuously on your Netflix home page; a title in your Spotify recommendations; a book promoted by Amazon; a text sample inspired by a famous work on ChatGPT or even a painting in your Google image suggestions... All these processes that we are used to in the digital world are about Discoverability.

When you come across a video, image, song or text online that matches your preferences, without actively searching for it, it is no coincidence. It results from **filtering and recommendation mechanisms**, the parameters guiding the algorithms, and the ways in which the **data describing these works are indexed**.

Discoverability can easily be summed up by **three parameters** that bring together three key issues:

Identification

Identification by platforms and search engines of the work, which corresponds to its ability to be found;

Availability

Availability of the works to be distributed by the platform or the search engine;

Recommendation

Recommendation which means visibility, prominence of the works on platforms (homepage, catalogues...), search engines and social networks.

Why is discoverability important?

The digital world has brought new challenges to our lives like consumers but also to the creative and cultural sectors: this new deal has opened new horizons for creation, production and distribution, offered opportunities of domination for American web giants, strengthened the power of consumers to choose and even to order, and multiplied the screens, services and possibilities for accessing works. It has turned our public policy framework on its head.

It has also made it necessary to review the rules in order to fight piracy more effectively, to promote a level playing field, to integrate platforms into the creative ecosystem and, more recently, to guarantee the respect of the intellectual property rights in the world of AI.

We still have a long way to go. Much remains to be done to better support the diversity of cultural expressions in Europe.

And discoverability is the key because: Discoverability is a concept that concerns all Cultural and Creative sectors

While discoverability impacts each sector differently, all are concerned by this issue. For **music**, discoverability is illustrated by the appearance of content and in particular of playlists on streaming platforms; for the **audiovisual** sector, it involves promotion on Internet and on the catalogues of platforms of Video On Demand; for **live performances**, it's more specially the promotion of performances on video sharing platforms and search engines; for the **visual arts**, it is particularly a question of search engines facilitating the discovery of works; finally, for the **book sector**, it involves large distribution platforms that promote certain works.

Doing nothing would be irresponsible for European creativity and culture.

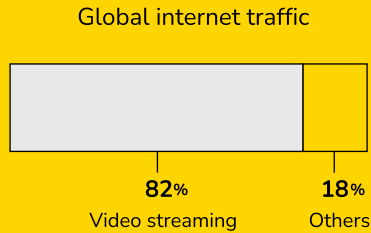
Digital technology can be an opportunity for creativity, for its funding and for its distribution. This is an indisputable fact.

But the central role now played by algorithms, with no rules or supervision, can also lead to the public being trapped in filter bubbles. In other words, by guiding their choices, they can deprive citizens of real access to a diversity of works, books and films. And in the future, they could lead to whole swathes of European creativity and culture becoming invisible.

This is a danger for all European creative and cultural sectors and industries, and represents a major risk of loss of economic value and cultural standardisation.

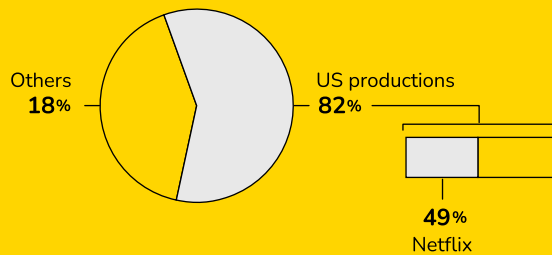
AUDIOVISUAL

Video streaming accounts for more than 82% of global internet traffic¹



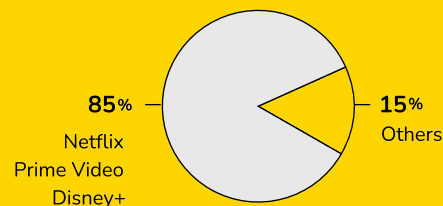
US productions make up 59% of viewing time on VoD platforms in Europe², with Netflix alone accounting for 49%³

Viewing time on VoD platforms in Europe



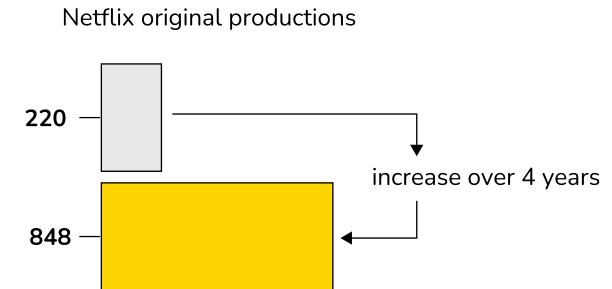
In April 2024, Netflix, Prime Video and Disney+ have 85% of Europe's SVOD market⁴

Europe's SVOD market



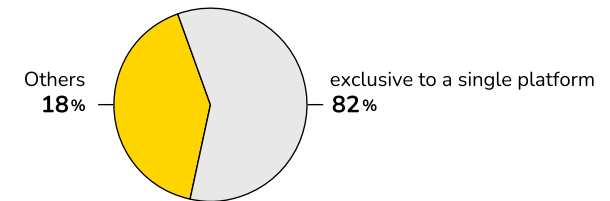
AUDIOVISUAL

In four years, the number of Netflix "original" productions grew fourfold, increasing from 220 to 848 titles⁵



In 2022, over 82% of films distributed by VoD platforms were exclusive to a single platform⁶

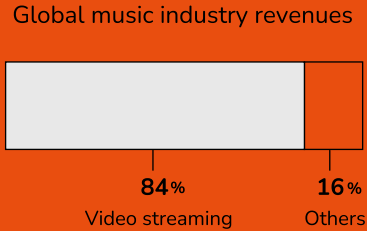
Films distributed by VoD platforms in 2022



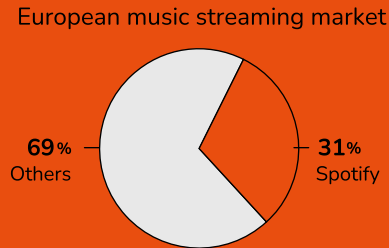
1 Demandsage's latest Video Marketing Statistics of 2024, September 2024
 2 European Commission, European Media Industry Outlook, May 17, 2023
 3 European Commission, European Media Industry Outlook, May 17, 2023
 4 <https://www.mobileeurope.co.uk/netflix-prime-video-and-disney-have-85-of-europes-svod-market/>
 5 CNC, Video on Demand Observatory, January 27 2023
 6 CNC, Video on Demand Observatory, January 27 2023

MUSIC

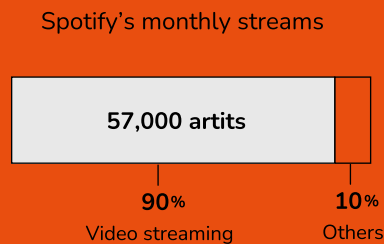
Music streaming accounts for 84% of global music industry revenues⁷



In 2021, Spotify led the European music streaming market with a 31% market share⁸



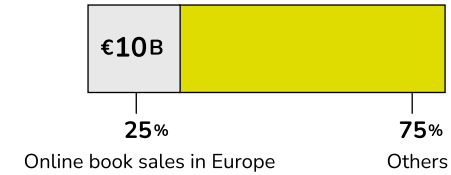
As of March, of the same year, 57 000 artists accounted for 90% Spotify's monthly streams⁹



BOOKS

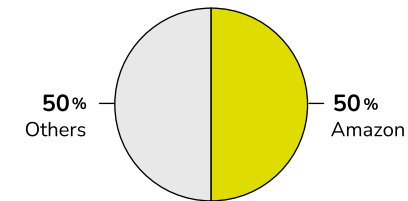
Online book sales reached 10 billion euros in Europe in 2023 and represent more than 25% of the global distribution channel.¹⁰

Global distribution channel for online book sales in 2023



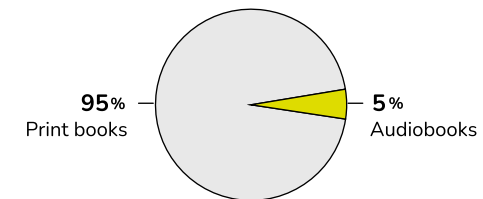
Amazon holds more than 50% of the global online book sales market¹¹

Global online book sales market



Although print books still dominate, audiobooks reached over 5% of total sales in 2021, growing their share by 27% in seven years¹²

Global online book sales market



7 Exploding Topics, Music Streaming Services Stats, February 1 2024
 8 - 9 GESAC, Study on the place and role of authors and composers in the European music streaming market, September 2022
 10 FEP, European Book Market statistics 2022-2023, Octobre 18 2023
 11 <https://e-tailize.com/fr/blog/les-25-meilleures-places-de-marche-pour-vendre-des-livres>
 12 Wordsrated, Global Book Sales Statistics, January 26 2023



Discoverability issues :

four main stakes

1★

A citizen and research issue: Understanding and answering the challenge of the digital environment

It is essential we give ourselves the **means to better observe and understand** the digital ecosystem, in particular the way the public has access to works and the importance of metadata for referencing.

Recommendation: encouraging the development of methods and tools to measure cultural diversity online, including the evaluation of platform recommendation systems.

*An example of best practice: since 2020, the **Chair of «Pluralism and Digital Ethics»¹³** is working on the diversity and quality of online cultural and media content, and the ethical issues surrounding algorithms and digital technology. It has notably developed a way to evaluate the Netflix recommendation system.*

¹³ <https://pcen.fr/>

2★

A human resources challenge: Strengthen the skills of cultural professionals

Better understanding the digital environment must go hand in hand with strengthening the skills of professionals in order to promote European creation. It is essential to focus on training in the use of **metadata**, keywords for referencing works and semantic links between content - two essential parameters in the content recommendation process - to give professionals and the general public the skills they need **to index content themselves**.

Recommendation: encouraging and launching training programmes and innovative initiatives for professionals to improve the editorial content of works, monetise content and use digital resources to better promote European creation.

An example of best practice: MétaMusique¹⁴ is a Canadian government project that aims to create a national standard for music metadata. This infrastructure will help music rightsholders to better manage their rights and catalogue and make it easier for music consumers to find the songs and albums they are looking for.

¹⁴ <https://metamusique.ca/>
¹⁵ <https://www.tv5monde.com/>

3★

A cultural and industrial issue

Local and European digital services play an essential role in promoting cultural diversity, often being better able to promote the discoverability of local content thanks to local decision-making. However, the reality of the audiovisual and cultural markets is now increasingly concentrated in a few giant online distribution platforms. These are often owned by non-European players and dominate the markets, to the detriment of European operators.

Recommendation: supporting the emergence and consolidation of local and European players and platforms

An example of best practice: Created in 2020, the TV5MONDE¹⁵ platform is based on a free video-on-demand model that prioritises discoverability through weekly, regionalised, manual editorialisation of home pages. This human effort compensates for the normal algorithmic recommendation. Internet users who watches Canadian detective series, for example, will be offered Swiss or Belgian detective series.



A political and regulatory issue: bringing about new public policies to regulate platforms and promote cultural diversity

In a few years' time, according to a report from the Europol innovation laboratory, 90% of the content visible online could be created by machines and AI!

Recommendation: encouraging the development of methods and tools to measure cultural diversity online, including the evaluation of platform recommendation systems.

It's time to draw inspiration from the projects, innovations and concrete applications of discoverability to build a protective regulatory framework and anticipate tomorrow's challenges.

Recommendation: The EU has taken important steps to regulate platforms, notably through the 2019 Copyright Directive and more recently with the DSA and the DMA, but also to ensure that they participate in the financing and exhibition of European creative works. The 2018 Audiovisual Media Services (AVMS) Directive provides for a minimum quota of 30% of European works on SVOD platforms and gives each Member State the right to require these services to invest in audiovisual and cinematographic creation.

This minimum framework should serve as a basis for stronger discoverability objectives.

Examples of best practices:

- the **2022 conclusions of the Council of Ministers of culture** have enshrined the objective of promoting strategic approaches to the online discoverability of European cultural content;
- the **Work Plan for Culture 2023-2027** calls for a workshop (2025) to better understand the impact that content prioritisation practices, algorithm recommendations and curation strategies have on cultural and linguistic diversity;
- to date, three parliamentary reports mention the main challenges for discoverability:
 - the draft report on **cultural diversity and the conditions for authors in the European music streaming market** by rapporteur **MEP Iban García del Blanco** notably "calls on the European Commission to propose a legal framework to ensure the [...] discoverability of European works on music streaming platforms";
 - the draft report on the **future of the European book sector** from **MEP Tomasz Frankowski** acknowledges the potential benefits for the sector of the use of AI such as [...] online discoverability;
 - the report on the **implementation of the AVMS directive** "calls on the European Commission and the European Regulators Group for Audiovisual Media Services (ERGA) to promote the exchange of best practices among Member States on deploying [...] discoverability tools".



About the European Coalitions for Cultural Diversity

The European Coalitions for Cultural Diversity (ECCD) is an **association of national coalitions** which promotes the diversity of cultural expressions. Founded in 2005, the ECCD bring together 10 national coalitions in a federation representing professionals from cinema, audiovisual, performing arts, editing, music, visual arts and multimedia and covering **all professions in the artistic and cultural sectors** such as authors, producers, composers, editors, artists-interpreters, broadcasters...

The ECCD work in Brussels to uphold the **2005 UNESCO Convention** on the protection and the promotion of cultural diversity which the EU has ratified. To this end, the ECCD supports and encourages EU cultural policies that are necessary to underpin the creative industries, creators and our diverse cultures to ensure that they thrive and prosper.

For many years, the ECCD has followed the early work on the discoverability of online content. On March 9th, 2023, the ECCD organised the first **Discoverability Forum** in the European Parliament gathering **all cultural and creative sectors** to explore all the issues involved in the **discoverability of European creative works online** in the future.

“The ECCD encourages EU Member States to implement the necessary public policy measures to ensure diversity within our cultural and creative industries so that our citizens have access to and can discover the full diversity of European creative works across all genres in the digital world.”

Carole Tongue, Chair of the ECCD



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