

Discoverability of Diverse European Cultural Content in the Digital Environment

ECSCA Conference
2 June 2026

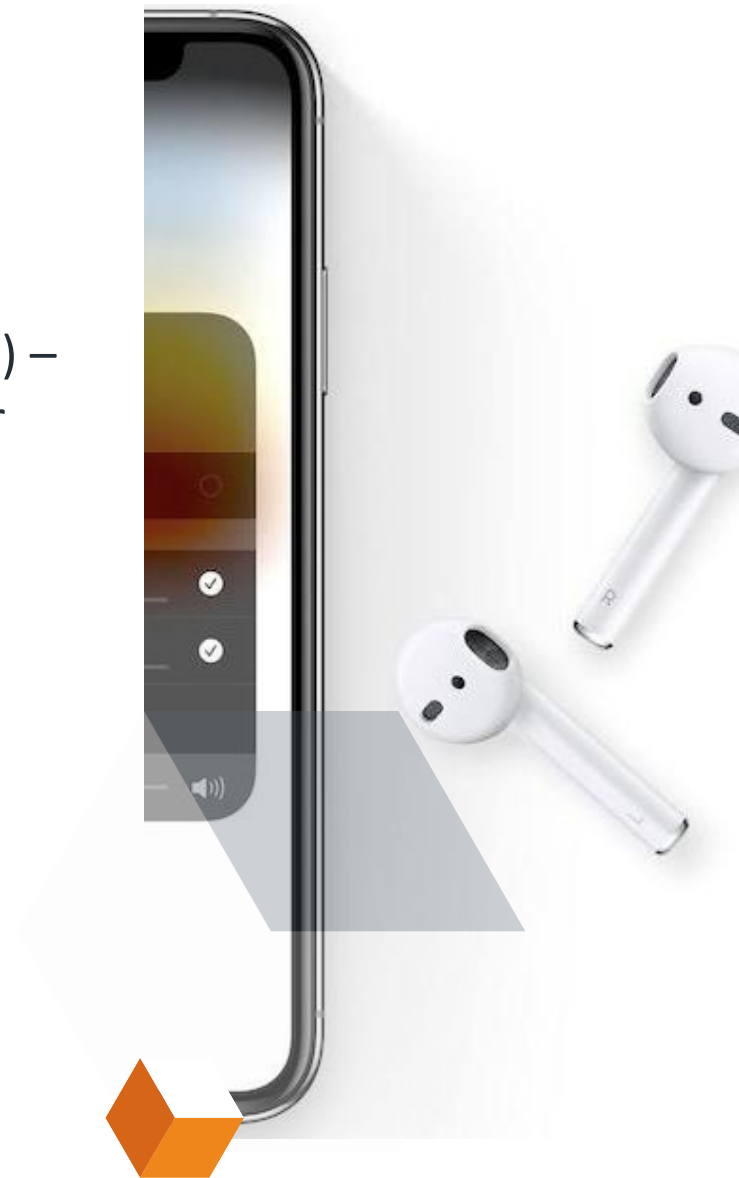


Panteia



Background to the study

- Study ran from April 2024 – April 2026
- Carried out by a consortium of six organisations (led by Panteia) – with support from a scientific advisory board and a stakeholder community.
- **Methods:** Desk research, in-depth stakeholder consultation (interviews, focus groups, workshops), consumer survey, policy analysis, quantitative data analysis, recommendation development
- **Scope:** Covered five different cultural sectors, with a focus on music and books.



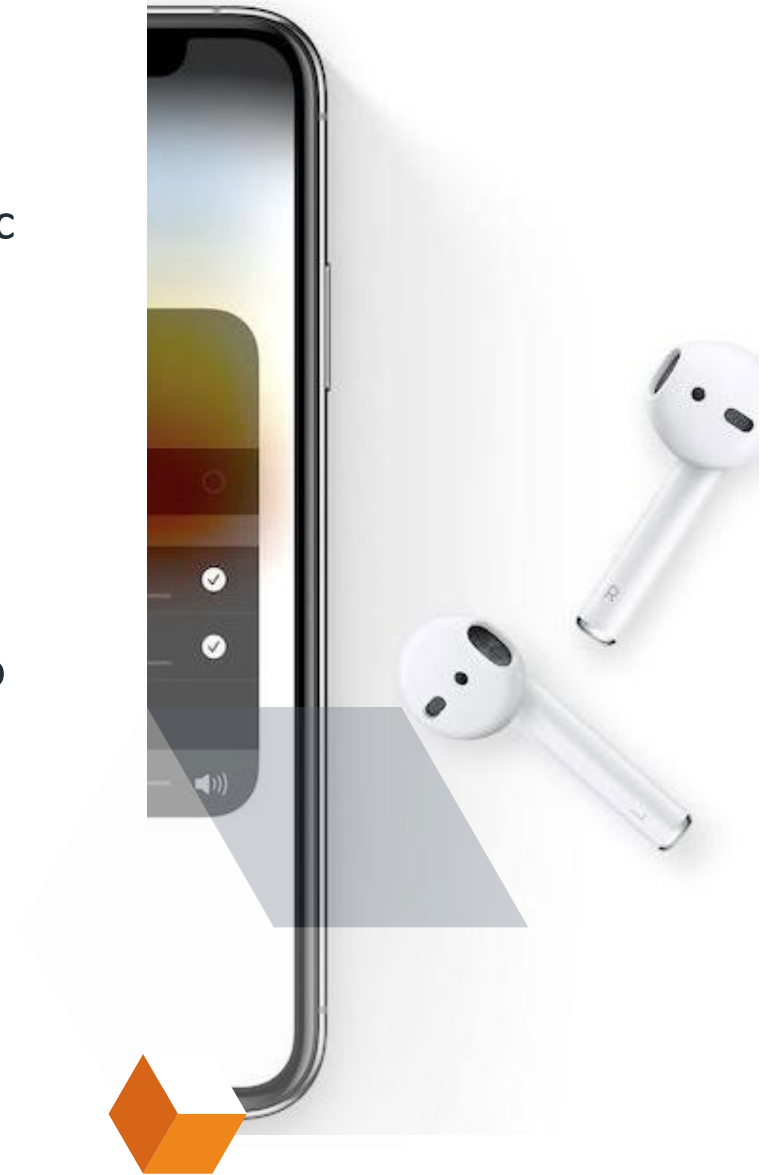
Objectives

- Better **understand needs and specificities** of each cultural and creative sector explored, as regards **discoverability of diverse cultural content online**, including **enablers** and **obstacles**.
- Gather information on **existing relevant policies at all levels and in all EU Member States**, i.e., including regulatory measures, support measures and public and private initiatives, **to foster discoverability online**
- Identify **curation patterns** and **trends in algorithm recommendations** as regards exposure to cultural content.



Objectives

- Evaluate the **impact of these practices** on cultural and linguistic diversity.
- Investigate the **state of play in algorithm design** for discoverability and diversity of cultural content.
- Discuss possible **policy or regulatory options** and provide **evidence-based recommendations** to increase the exposure to diverse European cultural content online.



What is discoverability?

The ability of content to be **available** online to **stand out** amongst a vast array of other content and to **be suggested or recommended** to a person who was **not specifically looking for it**

(Ministère de la Culture et des Communications du Québec, and Ministère de la Culture de France, 2020.



the likelihood that an item will be interacted with

Availability is no longer enough

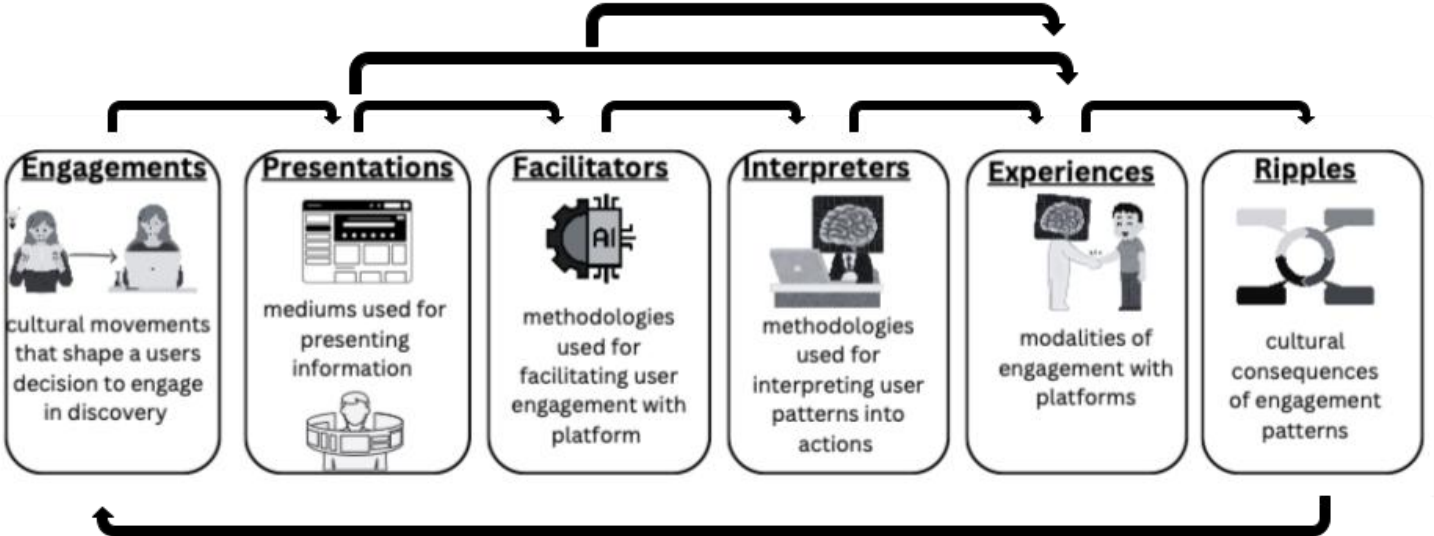
Discoverability determines whether diverse European music is actually heard.

In a hyper-abundant digital environment, visibility becomes scarce.

- Platforms and algorithm-driven systems increasingly shape what is seen, recommended and consumed.
- The key policy shift is from supporting availability to ensuring exposure diversity.
- GenAI raises the stakes by adding more content, more synthetic media and greater need for provenance.

How online discovery actually happens

A six-part ecosystem links user motivations, platform design, recommender systems and cultural outcomes.



Active search

Users look for new music intentionally.

Passive exposure

Playlists, autoplay and feeds guide listening.

Ripples

Visibility affects diversity, careers and cultural value.

Streaming is the main gateway to music discovery

Discovery is shaped by music streaming services, social recommendations and live contexts.

89%

say music streaming services are important or very important for discovery

85%

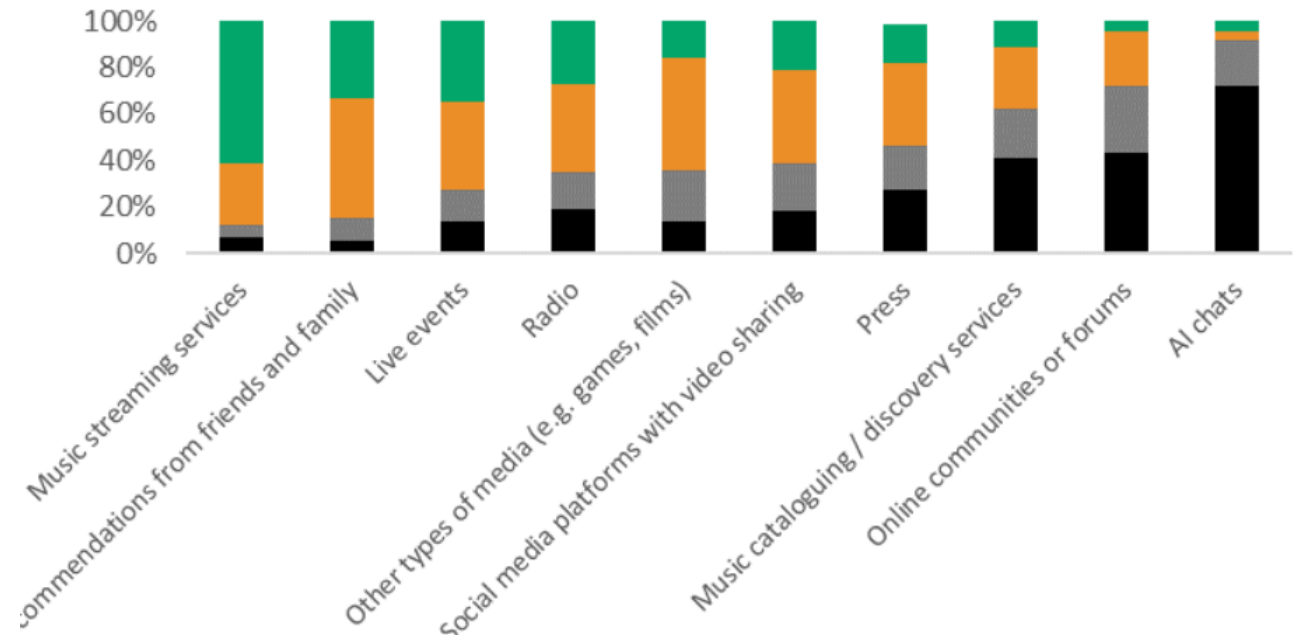
say recommendations from friends and family matter

73%

say live events and concerts are important discovery routes

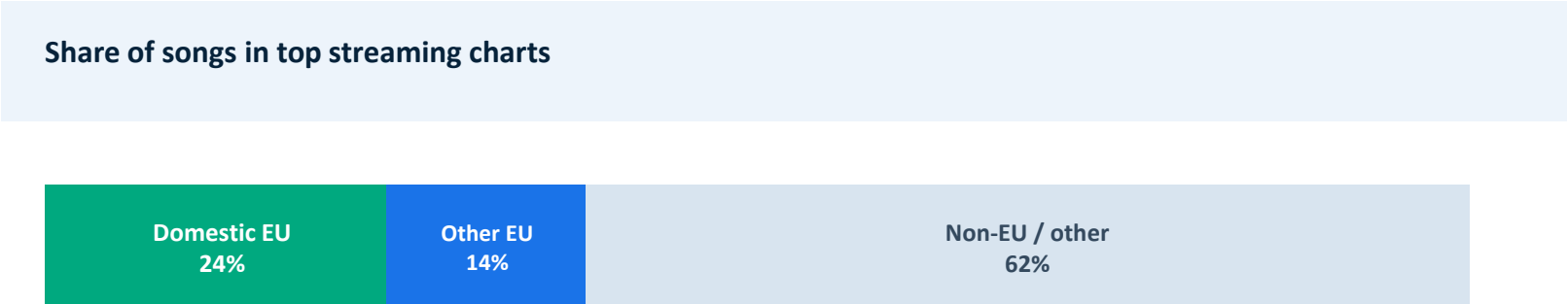
Implication: platform design and playlists influence not just consumption, but the visibility of European cultural diversity.

"How important would you say are the following sources for your discovery of music?"



European music is visible nationally - less so across borders

The study finds strong domestic momentum but limited non-national EU circulation.



38%

of chart songs are European overall

14%

are non-national EU works

62%

of users feel algorithms help discover new music

Music sector: key challenges and opportunities

CHALLENGES

- 1 Hyper-abundance of releases, intensified by AI-generated uploads and streaming fraud
- 2 Playlist and algorithmic gatekeeping that reinforces popularity bias
- 3 Passive listening that narrows active exploration and repeats the familiar
- 4 Incomplete metadata and weak provenance, attribution and rights data
- 5 Market concentration, capacity gaps and fairness concerns for smaller actors



OPPORTUNITIES

- 1 Interfaces that make exploration and serendipitous discovery easier
- 2 Hybrid editorial + algorithmic curation to surface emerging artists
- 3 Social, gaming and live digital pathways that can create new exposure
- 4 Creator-facing transparency tools for algorithms, metadata and audiences
- 5 Decentralised and community-led models that strengthen human curation

GenAI intensifies the discoverability challenge

More music is not the same as more diversity.

- AI-generated music adds to an already saturated release environment.
- Synthetic content can crowd recommendation feeds and digital catalogues.
- Streaming fraud and bot activity can distort rankings, charts and playlist placement.
- Provenance, attribution, copyright and cultural value become core discoverability questions.

Policy lens: distinguish, attribute and make human-created European works findable.

Transparency

Transparency is about understanding why content is surfaced, ranked and recommended.



User data

clicks, skips, saves

Recommender

ranking + playlists

Visibility

placement +
prominence

Streams

feedback loop

- Playlist placement and recommender systems act as gatekeepers.
- Popularity bias can reinforce already dominant artists and genres.
- Creators and researchers need platform data, API access and audit tools.
- Users need clear controls and explanations to understand recommendations.

Metadata is the hidden infrastructure of discoverability

Better metadata supports discovery, attribution, remuneration and GenAI transparency.

ISRC / identifiers

prevent confusion and mismatches

artist identity + origin

classify local and European works

language + genre

surface minority and niche repertoires

rights data

enable correct attribution and payment

AI provenance flag

distinguish synthetic and human-made works



Key risk: incomplete or inconsistent metadata can misclassify songs by nationality or language, and disadvantage smaller or emerging artists.

Recommendations

Governance

EU multi-stakeholder forum; dialogue on transparency, metadata and data access.

Data + metadata

Common definitions, improved standards and essential fields including AI provenance.

Capacity

Training for creators and organisations on metadata, SEO, analytics and recommenders.

Audiences

Digital and AI literacy to help users seek diverse content beyond defaults.

Research + innovation

R&D, sandboxes, fair algorithms and monitoring of AI-generated content impacts.

Supply + prominence

Curated showcases, prominence mechanisms and authenticity in the GenAI era.

These six areas form a roadmap: make European music findable, understandable and fairly surfaced in rapidly changing digital environments.



Questions?



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