

## **ACT FOR DISCOVERABILITY**

The digital revolution, which has been unfolding over the past twenty years, is confronting the world of culture with new challenges, emerging threats and new opportunities. In this landscape reconfigured by the emergence of global giants that have rapidly imposed themselves as central players in the production, distribution and dissemination of culture, the struggle for cultural diversity has taken on new meaning.

The fight against piracy, the implementation of new rules to integrate platforms into the financing of creation, the sharing of value with these new digital players: these are all issues that have renewed the questioning of cultural policies in France and in Europe.

At the beginning of these power struggles, the question of access to our works in the digital age arises, in other words, what we call their discoverability.

Numerous formulations have attempted to define this term originating in Quebec, like the definition proposed by the Discoverability Summit in May 2016 in Canada. We can retain the latest and recent draft from the Mission France - Quebec « on the online discoverability of French cultural content » :

*« The discoverability of a content in the digital environment refers to its availability online and its ability to be located among a vast set of other content, especially by a person who was not specifically looking for it. »*

### **A concept that concerns all sectors of culture**

While discoverability impacts each sector differently, all are concerned by this issue.

For **music**, which is already very present in the digital space, one of the central issues is to ensure a form of fair treatment by avoiding that devices, either in the playlists proposed on the home pages of music platforms (Spotify, Deezer...) or in the recommendations of the algorithms, do not make certain creations, often local, invisible.

For the **audiovisual and film industries**, where the notion of exclusivity is important, it is necessary to ensure a wide visibility of works among Internet users by improving their promotion, but also to guarantee a minimum presence of French or European works in online catalogs (Netflix, Disney+...).

In the performing arts, the problem is more at the level of search engines (Google, etc.) which must facilitate the search for shows, the discovery of the diversity of the offer and users ability to find cultural diverse works on streaming platforms when the whole catalogue is not available.

For the **book sector**, large distribution platforms such as Amazon have the ability to generate recommendations that can largely influence the choice of readers by pushing certain works or relegating them to the detriment of access to the diversity of the offer.

Finally, in the **visual arts**, the online visibility of exhibitions as well as the presence and indexing in the Web are crucial to facilitate public access.

If all sectors are concerned by the issue of discoverability, it is also because digital has become a main **gateway to access culture**. Fortunately, physical venues such as cinemas, theaters, concert halls and exhibition halls have not disappeared, but the « platformization » of access to culture has become a tangible reality, and digital players have become an essential part of the process of making cultural works visible.

The role of algorithms, particularly in terms of recommendations, often linked **to the « consumption" of works** », as well as the strategies deployed by the major platforms, have a very strong impact on the visibility of works, but also on the public's ability to find them.

### Online culture / Some figures

In France, 68%<sup>1</sup> of music listening is done via social platforms and networks (Spotify, Apple, Deezer, YouTube, DailyMotion, TikTok, Facebook, Instagram, Netflix..).

In 2021, the time spent listening to music via audio streaming subscriptions increased by 51%<sup>2</sup>.

In 2021, the VOD market is growing by 11.9% to €1,746.5M compared to 2020<sup>3</sup>

The number of daily VOD users in December 2021 is 8.7 million<sup>4</sup>.

Netflix, Amazon, Apple, Disney account for 72% of all SVOD subscriptions in Europe in 2020. The remaining 28% is split between 40 players<sup>5</sup>.

In Europe, the number of SVOD subscriptions increased by 46.1% in 2020, from 122.4 million, in 2019, to 178.9 million at the end of 2020<sup>6</sup>.

In 2019, internet sales accounted for 21% of the total value of new book sales<sup>7</sup>.

Amazon accounts for more than half of online book sales<sup>8</sup>.

## What are the challenges related to discoverability ?

Strengthening discoverability is crucial to the success of the digital transition of the creative and cultural sectors. The ability of professionals to make French and European creation, in all its diversity, live and shine in the digital world is at stake.

<sup>1</sup> Hadopi, « Les pratiques d'écoute de musique en ligne – Phase quantitative », [study](#), September 2020

<sup>2</sup> IFPI, « Rapport sur la consommation de musique dans le monde », [report](#), October 2021

<sup>3</sup> CNC, « Baromètre de la vidéo à la demande (VàD /VàDA) December 2021 », [barometer](#), February 2022

<sup>4</sup> CNC, « Baromètre de la vidéo à la demande (VàD /VàDA) December 2021 », [barometer](#), February 2022

<sup>5</sup> European Audiovisual Observatory, « Annuaire 2020/2021 Tendances clés », TÉLÉVISION, CINÉMA, VIDÉO ET SERVICES AUDIOVISUELS À LA DEMANDE – LE PAYSAGE PANEUROPEEN, [directory](#), 2022

<sup>6</sup> European Audiovisual Observatory, « Annuaire 2020/2021 Tendances clés », TÉLÉVISION, CINÉMA, VIDÉO ET SERVICES AUDIOVISUELS À LA DEMANDE – LE PAYSAGE PANEUROPEEN, [directory](#), 2022

<sup>7</sup> Lafinancementpour, « Le marché du livre : une industrie culturelle avec de fortes spécificités », [article](#), November 2020

<sup>8</sup> Kantar, « 2018 : Croissance de 11% des dépenses en ligne en France », [article](#), February 2019

4 main issues stand out :

❖ **A citizen and research issue : Understanding and apprehending the digital environment**

In the same way that discoverability is a new concept in the reflection on the impact of digital in culture, it is essential to give ourselves the means to better observe and understand the digital ecosystem, in particular on the way the public has access to works, on the functioning of algorithms and their prescriptive role, on the importance of metadata for referencing and visibility of works.

Research teams are at work in Quebec and in France (notably via the Chair "Pluralism and Digital Ethics", of which the [French Coalition for Cultural Diversity](#) is a partner), but it will be necessary to amplify the action and to network the knowledge.

This new knowledge will be as necessary to understand how to improve the availability and visibility of French and European works on platforms, but also to educate and convince the public as well as public and political decision-makers about the importance of discoverability of works.

❖ **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 better promote French and European creation.

Sharing best practices, developing a training policy to learn how to better use metadata, better mastering digital marketing, understanding how algorithms work and the logic of promotion on social networks are some of the steps that could accompany a policy of support for discoverability.

❖ **A cultural and industrial issue : supporting the emergence and consolidation of local players and platforms**

In this world of platforms dominated by global giants, many studies have **shown that local and European digital services play an essential role** in promoting cultural diversity, often being more likely to foster the discoverability of local content and acting through local decision-making centers.

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

While discoverability is not mentioned as such, there are several initiatives designed to promote works both at the international and European levels and at the French level.

The adoption of the *UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions* in 2005 was followed ten years later by the publication of operational guidelines that reinforced the principles of cultural diversity in the digital world.

In the same vein, Europe has taken important steps in recent years not only to regulate platforms, notably through the *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 creation. The *Audiovisual Media Services Directive* has thus allowed Member States that so wish to set up investment obligations for video-on-demand services and has imposed a minimum **quota of 30% of European works on all these services**.

This major advance must be extended. Because it essentially concerns audiovisual and cinematographic creation. Because the rules it sets are more quantitative than qualitative, even though the notion of discoverability should lead to more refined regulations that are better adapted to a world in which **algorithmic recommendations largely guide access to works**.

This is why the reflection must be oriented towards a reinforcement of European and French public policies mainly in 4 directions :

- The regulation of major operators and digital platforms
- The promotion of national and European creation
- The transparency of data, metadata and algorithms
- The implementation of funds dedicated to the digitization of works