

Study on the discoverability of diverse European cultural content in the digital environment

Executive summary



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Introduction

The Importance of discoverability

In an increasingly digital cultural landscape, where audiences encounter music, films, books, and other creative works primarily online, **discoverability** has become a decisive factor in shaping what is seen, heard, and valued. Put simply, discoverability determines whether a cultural work can rise above the digital noise to be noticed, accessed, and engaged with by audiences. For Europe's rich cultural and linguistic diversity, this is no longer a peripheral concern but a central condition for visibility and access in the digital age.

At the same time, Europe's cultural and creative industries are operating in a fast-evolving environment shaped by digitalisation, intensifying global competition, and the growing power of large online platforms. While these platforms open unprecedented pathways to global audiences, they also introduce new structural challenges. Algorithmic curation, limited transparency, and control over data can shape cultural consumption in opaque ways, while market concentration, content saturation, potential bias in recommendation systems, and the rapid rise of AI-generated content further complicate the ecosystem.

Against this backdrop, safeguarding cultural and linguistic diversity online has emerged as a pressing policy priority at international, European, and national levels. Europe has long championed cultural diversity, as reflected in UNESCO conventions and EU treaties. Yet policy efforts have traditionally focused on supporting the production and availability of diverse cultural content. Today, policymakers increasingly recognise that **being available is no longer enough**: discoverability has become the next critical frontier. This shift raises a new set of complex questions, which this report explores in depth.

Objectives, scope and methodology

Commissioned by the European Commission under the **EU Work Plan for Culture 2023–2026**, this study examines how European cultural content is discovered and accessed in today's digital environment. It assesses the current state of online discoverability of diverse European cultural works, with particular attention to the role of platforms, curation, and recommender systems, and identifies emerging challenges and areas for policy action.

The study focuses primarily on the **music and book sectors**. Other cultural sectors are addressed more selectively, while the audiovisual sector falls outside the scope of the study.

The research combines desk research, sectoral analysis, and data mapping with extensive stakeholder engagement, including interviews, focus groups, and a

workshop. A Europe-wide consumer survey of over 400 participants provided additional insights into user experiences. Quantitative analyses examined consumption patterns, curation practices, algorithmic recommendations, and metadata in the music and book sectors. Academic and methodological rigour was ensured through expert peer review by a Scientific Board.

The impact of digitalisation and platformisation on cultural and linguistic diversity

Digitalisation, platformisation, and diversity

Digitalisation and the rise of global platforms have **fundamentally reshaped cultural and linguistic diversity in Europe**. Content availability has expanded dramatically, but availability alone does not guarantee diverse consumption. Instead, discoverability now depends on exposure diversity — whether audiences are actually recommended, notice, and engage with a variety of cultural expressions.

Platformisation has **blurred traditional sectoral boundaries**, with performers, creators, cultural organisations and museums producing cross-media content, while global tech platforms act as gatekeepers. This convergence has created an attention economy where recommendation systems and curation practices strongly influence what becomes visible, prioritising certain works while neglecting others.

A conceptual framework for discoverability

Digital discoverability is the likelihood that cultural content will actually be noticed and engaged with online. It is not just about content being available, but about whether audiences are exposed to it and interact with a diverse range of works. In today's digital environment, supply is abundant—but visibility is scarce. What people end up seeing is shaped by a complex ecosystem of actors and dynamics. This study describes a discovery ecosystem with six interconnected elements:

- **Engagements** – the personal and social conditions that shape whether people can and want to explore, such as language, background, and digital skills.
- **Presentations** – the way platforms organise and showcase content through design, navigation, and placement—deciding what catches the eye and what stays hidden.
- **Facilitators** – the human and automated gatekeepers, from search tools and recommender systems to editorial teams, that decide what gets pushed forward.
- **Interpreters** – the behind-the-scenes systems that track clicks, listens, and viewing habits, turning behaviour into signals that shape future suggestions.
- **Experiences** – how users actually move through platforms, switching between curiosity and routine, shaped by trust, transparency, and context.

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- **Ripples** – the wider consequences of these discovery patterns, influencing cultural diversity, creator visibility, economic opportunities, and shared identity.

Global digital platforms (streaming services, social media, online stores) have become central gatekeepers of cultural discovery. They rank, moderate, and recommend content in ways that shape attention. In this attention-driven economy, prioritisation (ranking), prominence (visibility), and exposure diversity (what users actually encounter) are tightly linked and determine real opportunities for discovery.

The conceptual framework developed for the study highlights that **discovery happens through both active search and passive algorithm-driven exposure**. Users may intentionally seek out new works, but they are also guided by autoplay playlists, homepage carousels, and recommendations. Even “active” choices are influenced by what platforms present first. Interfaces, algorithms, and human curators therefore play a decisive role in shaping what stands out—and whether cultural horizons widen or narrow. Ultimately, diversity of exposure is the key measure of whether discoverability is truly happening. The research also identified several cross-cutting challenges for the discoverability of diverse European cultural content online:

- **Language silos and translation gaps** keep audiences confined to familiar languages, leaving minority and smaller-language works largely invisible across borders.
- **Generational and behavioural divides shape discovery paths**, with younger users led by social media and trends, while older audiences rely on established, more traditional channels.
- **Too much content on a few big platforms creates a paradox:** content is everywhere, but attention and visibility are increasingly scarce.
- **Personalisation, algorithmic bias, and weak metadata** often reinforce what is already popular, narrowing exposure to diverse and lesser-known works.
- **Limited transparency and data access** leave creators, cultural operators, and researchers in the dark about how visibility is generated and how it might be improved.
- **Unequal promotion and curation power** favour large players who can invest in prominence, while smaller and independent actors struggle to be seen.
- **Capacity gaps** persist across the sector, with many creators and institutions lacking digital skills, marketing expertise, or resources.
- **Low user awareness and digital literacy** combined with reliance on default recommendations quietly narrows cultural choices.
- **The rise of generative AI** risks flooding platforms with synthetic content, making it harder for human-created European works to stand

out and raising unresolved questions around attribution, copyright, and cultural value.

Policy landscape

The discoverability of diverse cultural content online has become a major policy priority internationally, at EU level, and across Member States. While cultural diversity is long embedded in frameworks such as the 2005 UNESCO Convention on the protection and promotion of the diversity of cultural expressions and Article 167 of the Treaty on the Functioning of the European Union, digitalisation and platformisation have increased urgency to act: **visibility and promotion—not just availability—now shape cultural sustainability and pluralism**. International policy debates increasingly point to the need for proactive policy intervention as global platforms and new technologies reshape cultural access.

Cultural diversity is central to European identity. Although the EU has only supportive competences in culture, it shall take cultural aspects into account in its policies in particular to respect and promote the diversity of its cultures. Key strategies, including the **EU Work Plan for Culture 2023–2026** and the **Culture Compass for Europe**, explicitly prioritise improving the discoverability of diverse European works online. EU AI strategies also support investment in AI for greater visibility of European cultural content, while emphasising alignment with European values.

Several EU instruments indirectly influence discoverability. The **Audiovisual Media Service Directive** introduces quotas and prominence obligations for European audiovisual works. The **Digital Services Act** and **Digital Markets Act** increase transparency and user control over ranking and recommender systems. The **AI Act** and **Accessibility Act** add requirements on marking AI-generated content and ensuring accessibility. While these measures do not directly regulate “discoverability” as such, they create a more transparent, contestable and user-empowering digital environment in which diverse content can more fairly surface. **Funding programmes** complement regulation by supporting cooperation, research, innovation and cross-border circulation of European cultural content. **Member States** have also experimented with diverse policies. These initiatives improve access to national culture and heritage but often prioritise digitisation, consumption or affordability over structural discoverability.

Music sector

The European music sector has been **reshaped by the rise of music streaming services**, which now dominate revenues and act as the main gateways to discovery. Streaming has lowered barriers for independent artists, but it has also created extreme overcrowding: in 2023, 184 million tracks were available, nearly 80 million of them streamed fewer than ten times. The rapid growth of AI-generated music—already close to one fifth of uploads—adds further pressure on visibility. Survey data confirms that streaming platforms are the primary route to discovery (89%), followed by recommendations from friends and family (85%)

and live concerts (73%). Playlists, both algorithmic and editorial, are central, with social media increasingly shaping what audiences hear.

Based on data collected by the study, **European music performs relatively well in national contexts**: 38% of songs in top streaming charts are European, largely driven by domestic artists (24%). **Cross-border circulation remains limited**, however, with non-national EU works accounting for just 14% of chart entries. Genre trends show the dominance of urban styles (rap, hip-hop, trap), often rooted in local languages, alongside global genres such as Afrobeats and Electronic Dance Music. Exposure is still concentrated around superstar artists, though some platforms offer relatively greater visibility to mid-level and developing artists, while gender imbalances persist despite recent improvements. Metadata gaps further limit accurate measurement of diversity. Younger listeners emerge as key drivers of diversity, showing greater openness to new genres and emerging artists.

Discovery on streaming platforms is shaped by a mix of editorial and algorithmic playlists, used by nearly all users. High-profile playlist placement can generate millions of streams. Algorithms optimise for engagement but often reinforce popularity loops, privileging mainstream, U.S. and English-language content. However, the quantitative research conducted in this study points to recommender systems' potential ability to capture certain localness when national music is already listened to. While 62% of surveyed users feel algorithms help them discover new music, far fewer report greater exposure to national, EU or non-English language works—highlighting a gap between perceived discovery and actual diversity. Social media pathways often surface greater diversity, though examined social media platform charts remain dominated by U.S./UK tracks.

Key challenges to discoverability of diverse European music include:

- **High volume of releases**: The massive and continuously growing number of new weekly uploads on digital platforms makes it challenging for diverse European artists to achieve visibility, as recommendation systems and user attention are spread across an ever-expanding pool of content. This is worsened by **streaming fraud** and the rapid **proliferation of AI-generated music**.
- **Gatekeeping via playlists and algorithms**: Popularity bias entrenches dominance of mainstream and non-EU content.
- **Passive listening behaviours** (lean-back/background use) reduce active discovery, leading to repetitive recommendations.
- **Metadata issues**: Incomplete or inconsistent metadata (International Standard Recording Code errors, limited non-Latin support, missing pronoun data) undermine attribution and discoverability.
- **Market concentration**: Major labels dominate digital royalties and influence playlisting priorities.

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- **Digital capacity gaps among creators and organisations:** Many European creators, smaller publishers, independent labels, and cultural organisations lack the digital skills, data literacy, and resources needed to promote their work effectively online.
 - **Fairness concerns:** Practices linking visibility to reduced royalties, raise ethical and financial challenges, although alternative payout systems show promise.

Despite these challenges, the digital environment also provides new tools that can contribute to strengthen the diversity and discoverability of European music, including:

- **Innovative interfaces** allow intuitive exploration and serendipitous discovery.
- **Hybrid models** combine algorithmic and editorial approaches to surface emerging artists.
- **Editorial curation** can meaningfully boost female and independent artists.
- **Social media and gaming platforms** offer powerful new pathways for exposure, often driving measurable spikes in streams and chart performance.
- **Data transparency tools** empower creators to understand algorithms, optimise metadata, and target audiences more effectively.
- **Decentralised and community-driven models** demonstrate how human curation, and participatory platforms can foster diverse discovery.

Book sector

The European book sector **remains strongly anchored in offline discovery:** around 75% of sales still happen in physical bookstores, which provide trusted curation, community engagement, and personalised recommendations. Libraries also play a key role in access and inclusion. Word-of-mouth remains the most trusted discovery channel, showing that social networks still shape reading choices. At the same time, **digitalisation has expanded the market through e-books, audiobooks, and subscription services.** Social media communities now influence discovery—especially among younger readers—but often amplify English-language dominance at the expense of Europe’s linguistic diversity. Emerging initiatives, including AI-driven tools and national platforms, point to more localised and inclusive alternatives.

Survey results show strong loyalty to home-country authors (70% of readers are very likely to read them), alongside openness to EU and global literature. However, **translation gaps, weak visibility, and limited recommendations** remain major barriers to cross-border circulation. Screen adaptations can significantly boost the prominence of European works. Gender diversity remains

uneven, with women underrepresented in bestseller lists, though slightly more visible on digital platforms.

Platform and bestseller analysis reveals structural imbalances. Based on the data analysis performed in the context of the study, on the examined platforms targeting global audiences, non-EU titles frequently dominate, with EU titles typically accounting for less than 10% of the most popular books. National EU titles achieve substantially stronger visibility on local EU platforms and national storefronts of international platforms, while non-national EU titles generally represent a smaller share, with notably exceptions mainly observed in smaller or linguistically shared markets.

The sector faces persistent structural barriers to discoverability:

- **Translation gaps and high costs limit cross-border circulation**, while the relative affordability and prevalence of English-language editions further reinforce linguistic imbalances.
- **Inconsistent use of metadata standards and cataloguing** hinder visibility, especially for smaller publishers.
- **Platform fragmentation** creates silos, with limited interoperability across ecosystems.
- **Dominance of global platforms** leaves EU authors underrepresented, while EU-specific or local platforms often lack scale.
- **AI-generated books** are rapidly flooding digital marketplaces, raising risks of cultural homogenisation and overwhelming authentic European works.
- **Author visibility** pressures place increasing demands on personal branding and social media presence, often disadvantaging minority and smaller-market authors.

Despite these challenges, significant opportunities exist to strengthen discoverability of European literature, including:

- **Human translation remains essential for literary works**, ensuring nuance, cultural context, and stylistic integrity; EU funding programmes like Creative Europe already support this, but further investment could strengthen translator networks, fair pay, and cross-border circulation.
- **Expanding production in e-books and audiobooks** in multiple languages increases discoverability across borders, benefiting both native speakers and language learners, while also lowering costs for independent authors and small publishers.
- **Inclusive collections within digital libraries and archives** can spotlight regional, niche, and marginalised voices, countering dominance of mainstream titles.
- **AI-powered search and recommendation tools** in digital libraries can highlight overlooked works, improve accessibility, and strengthen representation of diverse European literature.

Other cultural and creative sectors

Beyond music and books, cultural heritage, visual arts, and performing arts each face distinct discoverability dynamics shaped by their institutional structures and how audiences engage. Cultural heritage is largely public and preservation-driven, with digitisation and platforms like **Europeana** playing a key role. Visual arts still rely on galleries, fairs, and exhibitions, but are increasingly promoted and traded through social media, online auctions, and algorithmic curation. Performing arts remain rooted in live, place-based experiences, though streaming, online marketing, and digital ticketing are gradually reshaping access.

Across all three sectors, digitisation remains uneven. Many heritage collections are still not digitised and metadata quality varies widely. Visual arts face high digitisation costs, weak metadata practices, and growing dependence on a few dominant platforms, risking homogenisation. Performing arts struggle with limited resources and low public awareness of digital offers. These gaps are reinforced by structural inequalities between large and small institutions, regions, and urban–rural contexts, leaving many smaller players underrepresented online.

At the same time, new opportunities are emerging. AI, 3D digitisation, VR/AR, and linked open data can expand access to cultural heritage. Visual arts are being reshaped by virtual fairs, recommendation tools, and new digital marketplaces. Performing arts can use livestreaming and data-driven audience development to reach wider and international audiences.

Despite sector differences, three common lessons stand out: **digitisation and high-quality metadata are essential**, platform algorithms strongly influence visibility, and improving skills, resources, and collaboration—especially for smaller actors—is key to ensuring Europe’s cultural diversity remains visible online.

Recommendations

The study proposes a coordinated set of measures to strengthen the discoverability of diverse European cultural content online. The recommendations are structured around **six strategic action areas**, reflecting the challenges and opportunities identified across cultural sectors, and targeted at different categories of stakeholders (e.g. actors in cultural sectors or policymakers at European and/or national level).

1. Foster collaboration and governance for fair discoverability

Improving discoverability requires structured cooperation among platforms, creators, cultural organisations, policymakers, and researchers. The study recommends establishing an EU multi-stakeholder forum, integrating discoverability into EU and national cultural strategies, and promoting cross-sector partnerships to address issues such as transparency, metadata, and data access.

2. Enhance data collaboration and knowledge for better discoverability

Significant data gaps undermine the ability to assess and monitor the visibility of European works. Key actions include strengthening cultural data collection through the forthcoming EU Cultural Data Hub, developing consistent definitions of “European works,” improving metadata standards, and undertaking regular consumer surveys on cultural consumption and discovery.

3. Build digital capacity and tools for creators and cultural organisations

Many creators and smaller cultural organisations lack the digital skills and resources needed to optimise their visibility online. The recommendations call for training programmes, peer-learning networks, and practical tools (including AI-assisted metadata solutions) to help cultural actors promote their work more effectively in digital environments.

4. Audience-focused measures

Audience behaviour, digital skills, and linguistic needs are central to discoverability outcomes. The study proposes strengthening digital and AI literacy, running awareness campaigns on European cultural diversity, engaging young audiences, improving access for linguistic minorities, and supporting digital inclusion for older users.

5. Accelerating research and innovation for discoverability

Ongoing research and experimentation are essential as platforms evolve and AI reshapes content ecosystems. Recommended actions include supporting R&I initiatives on fair and diverse recommendation systems, studying the impact of AI-generated content, and developing tools to improve transparency and auditability of algorithms.

6. Bolstering European content supply: funding, curation, prominence and transparency

Ensuring that European diversity is visible online also requires strengthening the supply side. The study recommends expanding funding for translation and localisation, supporting curated cultural showcases, exploring prominence mechanisms for European works, increasing algorithmic transparency for creators and users, and ensuring authenticity in an era of AI-generated content.

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