



The European Consumers' Organisation

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Test on cultural diversity of online music distribution - Summary

Most of music is not available online!

Cultural diversity can be jeopardized by online business models

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Cultural diversity is considered to be a source of exchange, innovation and creativity, and as necessary to humankind as biodiversity is to nature. In order to investigate the musical diversity available to all consumers in Europe, BEUC launched a wide survey in August 2005.

The aim of this pan-European survey was to see whether the variety of music available on the growing number of commercial music-download websites operating in Europe is similar to the music currently available in the traditional record music market.

The question behind the survey was: Is industry really committed to cultural diversity when making content available?

For our test, we used seven Internet music-download websites from the UK, France, Germany and the Netherlands and searched for culturally diverse music titles that represented a range of different specialist music genres (see the test report for more details).

The test revealed that:

- Two thirds of current “popular” music albums requested are not available.
- Up to 90% of requested classical music albums could not be found.
- This lack of diversity is mainly linked to the record companies represented on these websites: if you want to find your favourite music that was published for example by Sony records, you will not be able to find it on a website where this record company is not represented. Smaller and specialized labels are generally absent.
- The search engines used by most of these websites performed poorly and it was sometimes difficult to find a desired album or track. This was true for classical music in particular.

In summary, these websites display a very low level of “cultural diversity” and the music download retail industry doesn’t seem to be committed to cultural diversity. This is all the more worrying as these websites can potentially ‘tie-in’ consumers to their music file format. In the longer term, consumers could restrict themselves to that choice of music. Specialized musicians and record companies could be squeezed out of the market.

Furthermore, the content of these websites is not selected primarily for its musical diversity but drawn from record company catalogues. Online distribution lends itself to buying ‘complete catalogues’ and in this way limits consumers’ musical choice. Another problem which curbs cultural diversity is that many of the smaller labels, particularly those dealing with back-catalogues (i.e. older recordings that the record company does not actively promote but is still in their catalogue of sales – like the Beatles recording for example), may not be readily available in digital form. Some of these labels may also be licensing music from other sources but do not have permission to distribute them to online music-download websites.

It is clear that online music business models are designed in a way that restricts rather than promotes cultural diversity. In the area of digital content, much remains to be done: more content needs to be made available.

Table:Yes: required music exactly foundPartial result: precise recording not available, but reasonable alternative foundNo: required music or acceptable alternative not found

Download website	Format	Total tested	Total YES %		Total NO %		Total Partial %	
iTunes Classical (UK)	AAC	82	13	15.86 %	67	81.70 %	2	2.44 %
iTunes Popular (UK)	AAC	175	60	34.29 %	92	52.57 %	23	13.14 %
Sony Classical (UK)	ATRAC3	84	6	7.14 %	76	90.48 %	2	2.38 %
Sony Popular (UK)	ATRAC3	175	57	32.57 %	93	53.14 %	25	14.29 %
HMV Classical (UK)	WMA	83	5	6.02 %	72	86.75 %	6	7.23 %
HMV Popular (UK)	WMA	173	57	32.95 %	87	50.29 %	29	16.76 %
MSN Classical (NL)	WMA	82	8	9.76 %	57	69.51 %	17	20.73 %
MSN Popular (NL)	WMA	173	51	29.48 %	111	64.16 %	11	6.36 %
Freerecordshop Popular (NL)	WMA	162	26	16.05 %	120	74.07 %	16	9.88 %
T-Online (Germany) Classical	WMA	83	8	9.64 %	73	87.95 %	2	2.41 %
T-Online (Germany) Popular	WMA	167	39	23.35 %	106	63.47 %	22	13.18 %
e-compil (France) Classical	WMA	84	0	0.00 %	83	98.81 %	1	1.19 %
e-compil (France) Popular	WMA	176	8	4.55 %	164	93.18 %	4	2.27 %