

TECHNICAL REPORT

Client: BEUC
Avenue De Tervuren 36
Brussels
Belgium

Report
issued by:



Davy Avenue
Knowhill
Milton Keynes
MK5 8NL

Tel. +44 (0)1908 857777
Fax. +44 (0)1908 857830

AUTHORISED
FOR ISSUE:

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Vanessa Lelliott

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REPORT AUTHOR: Roy Brooker

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Investigation into The Cultural Diversity of Music Download Web Sites

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Key Points

- Tests searching for culturally diverse music on seven Internet music download sites showed some diversity in the music available, but there was a problem as only about one-third of current “popular” music albums requested were available.
- The number of requested albums found for Classical music was much lower.
- This lack of diversity was mainly related to which particular record companies were represented on these sites. Smaller and specialist labels were generally absent.
- The search engines used by most of these sites performed poorly and it was sometimes difficult to find a desired album or track. This was particularly true for Classical music.

1. Introduction

Intertek Research and Performance Testing were requested by BEUC to conduct an investigation into the variety of music that was available from the growing number of commercial, legitimate music download web sites operating in Europe. There was concern that the 'cultural diversity' of these sites was poor and this had been emphasised by previous tests carried out by individual consumer groups. This was seen as an issue because of the way these sites can potentially 'tie-in' the consumer to their music file format. In the longer term, consumers could be limited to their choice of music and equally specialist musicians and record companies could be squeezed out of the market. A separate report '**On-line Download Music Services**' and associated Excel spreadsheet dealing with the technical issues surrounding this 'tie-in' is published with this report.

The tests have been carried out in accordance with the test programme, and as such, the results are only applicable to the sample tested and the conditions of the test. Sample variability and changes in test conditions could influence some results, and the result(s) as stated may not be representative of the mean result if a number of different samples were tested under a variety of test conditions.

2. Test Method

The Music

The method to investigate the cultural diversity of available music was simply to compile a large list of music titles that represented a range of different specialist music genres. This list was then 'applied' to the search engines of each of the sites under test. To compile this list, the laboratory used consultant musicologists and discographers to ensure the material selected covered a sensible range. The main criteria for inclusion were that the songs, artists or album titles were not mainstream 'popular' titles that would be selling on a daily basis (i.e. no Beatles or James Last). Equally they had to be:

- a) representative of what music enthusiast consumers would want to buy and.
- b) the selected songs, artists or album titles were currently available in the traditional recorded music market. This was important because some music, even some very popular music, may be temporarily unavailable for contractual reasons or unavailable simply because of lack of popularity, even within its genre. This lack of availability is out of the control of any record shop, so it would not be fair to include these in this test.

Most of the different specialist genres were chosen because they were considered to be of international interest and not pertaining to one country. However, a few were selected on a country dependant level. (e.g. Scandinavian folk/dance music, UK comedy, German military bands), but even these have international appeal, albeit small. Other genres such as Americana (American folk, blues, country), Reggae, '60/70s pop are regarded as being of international interest.

Classical music was given particular interest, as it is a specialist area with wide international appeal, a wide range of unusual repertoire and a large number of small record companies. The presence of a wide range of classical music is a good measure of a retailer's commitment to cultural diversity. The selling of classical music can be profitable generally, but not as profitable as the pop music side of the industry. So including classical repertoire demonstrates a commitment to musical diversity alongside the profit motive. It is also useful to realise that many major record companies have a classical catalogue containing a wide range of specialist titles. These catalogues are not there for purely altruistic reasons (although there is often an element of this), they are profitable in their own right. However, it is true to say they only survive by the presence of the more popular market. Generally, the classical market uses the manufacturing, distribution and retail infrastructure of the popular market. Without this popular market, the classical market (and other specialist genres), would find it very difficult to exist and prices to the consumer would probably be higher.

An initial investigation of the downloads sites, prior to formal testing, together with our existing knowledge of the way the record industry works, strongly suggested that the contents of these web sites was not selected primarily for their musical content (diverse or otherwise), but was based on "record company". For this reason we ensured that our selection covered a good range of companies as well as music content. As the results will show, this was an important decision.

The Web Sites

As the tests were being conducted in the UK by a UK test house it was natural that UK web sites were given a higher profile. This also made sense in comparing across the three main digital platforms. Thus the following were selected: iTunes.co.uk (AAC format); hmv.co.uk (WMA format) and sony.co.uk (ATRAC). Attention is drawn to the web site www.ondemanddistribution.com/fre/home/home.asp, this company actually supplies the WMA catalogue to many music download sites covering 10 European countries. This includes www.hmv.co.uk and www.msn.nl tested for this report, but includes many more such as Tiscali and Virgin.

In addition to the three UK sites, we tested four other European sites from France, Germany and two from Holland.

During our initial investigation we found one UK based classical label (that markets internationally) that was providing its own catalogue as on-line downloads in MP3 format. This format is now supported by most music players (iPod, Sony and WMA players) so it is universally compatible. Presumably, the lack of copy protection does not worry this company unduly because its music does not have the wide appeal so would not interest the large scale pirate duplicators. This could indicate a way forward for other specialist music providers.

Carrying Out The Tests

Tests were carried out on a typical, high specification PCs running Windows XP with a broadband connection to the Internet. In order for us to browse the three UK sites, it was necessary to download their special 'player' and install it on the test PC. (Interestingly the player for www.hmv.co.uk would only run on Windows XP SP2, presumably it required the extra Internet security that SP2 implements).

The selected music to be searched for was put into an Excel spreadsheet (separate worksheets for pop and classical). In most cases the required item to be searched for was for an artist or composer with a specific title or recording. In some cases it was less specific, e.g. any military band recording by a particular artist or any version of a piece of classical music. It soon became apparent that it was better to enter a minimum of information into the search engine (e.g. artist name only, not the specific title), and then search through the successful hits until the required title was found. The more specific you made the search, the greater the chance of not hitting the target. The reason for this was the relatively inconsistent nature of the search engines. The engines themselves were technically very good and could intelligently offer alternatives or check spelling. However, in operation they were limited by the quality of the data that had been entered. It was clear that there were many inconsistencies in the data. For example a classical composer may have been entered as the artist. The conductor of an orchestral work may or may not be entered as the artist. There were also examples of simple errors. In most cases, these errors were minor and a consumer, looking for a few items only would learn to try alternative searches.

For testing we took the same approach, but working within the time limits imposed by the project meant we had to keep the number of attempts down to two or three tries. Classical music seemed to suffer the most, on www.msn.nl a search of the classical composers revealed that the data entered had been literally copied from the CD and this resulted in many composers

being listed two or three times because of the different way of entering their name. The most extreme example being the composer Ralph Vaughan-Williams (who should be listed under 'V') whose music was spread over six separated entries: two entries under 'R' and three entries under 'V' and one under 'W'. Thus, to see the complete Vaughan-Williams recordings a user would have to check all these entries separately.

For similar reasons we did not find it helpful to narrow the search by using the web sites category options (e.g. browse/search within particular musical genres). This did not seem to speed up the search and could reduce the number of possible hits particularly if a CD had been incorrectly catalogued (see [Picture 1](#)). So the global search engine was used.



Picture 1: This screen capture from iTunes shows that the serious historical recording of British conductor Sir Thomas Beecham conducting works by French Composers has been categorised as "Hip-Hop/Rap".

The results for each search were entered into the spreadsheet using the following notation:

Yes = the required music was exactly found.

Partial result = the precise recording was not available, but a reasonable alternative was found. (This was a judgment based on what we felt a customer in a traditional record shop would accept. This was a useful measure of diversity because it may be that a particular piece by a *specialist* artist or composer is not listed, but there was a good selection of other music by that artist or composer).

No = the required music or an acceptable alternative was not found.

3. Results

Table 1:

	Format	Total tested	Total YES	Total NO	Total Partial
iTunes Classical (UK)	AAC	82	13	67	2
iTunes Popular (UK)	AAC	175	60	92	23
Sony Classical (UK)	ATRAC3	84	6	76	2
Sony Popular (UK)	ATRAC3	175	57	93	25
HMV Classical (UK)	WMA	83	5	72	6
HMV Popular (UK)	WMA	173	57	87	29
MSN Classical (NL)	WMA	82	8	57	17
MSN Popular (NL)	WMA	173	51	111	11
Freerecordshop Classical (NL)	WMA	0 *	-	-	-
Freerecordshop Popular (NL)	WMA	162	26	120	16
T-Online Classical (Germany)	WMA	83	8	73	2
T-Online Popular (Germany)	WMA	167	39	106	22
e-compil Classical (France)	WMA	84	0	83	1
e-compil Popular (France)	WMA	176	8	164	4

**this site did not generally offer classical music*

Clearly the sites tested show poor results from our test, particularly for classical music. The full results spreadsheet can be found in a separate Excel file. This spreadsheet also contains comments from the tester describing some of the findings.

It is tempting to analyse the data more deeply to show which genres were most affected, i.e. to see what types of music suffer from this lack of diversity and to establish if it is based on ethnicity, age, genre, popularity, etc. However, we would not advise this. Our experts are convinced that the lack of diversity is not directly related to musical type. In fact, during the search they were often surprised to find some quite unusual and diverse items. They are convinced the problem is simply, down to which record companies have been 'signed up'. Thus there are many Naxos albums (an international classical record label) that offer some very

obscure works. There are also large collections from most of the major labels including some diverse items.

The problem arises because in many cases there are no recordings at all from some smaller labels. Thus the poor showing of British classical music is probably due to the fact that the Chandos record label is not represented. Similarly, the poor results for some European 60/70s rock bands is due to the fact that the German based "Repertoire Records" catalogue is not represented. In the case of some American ethnic recordings it is due to anything from the ACE record label. In the conventional record trade, these labels, along with many similar specialist labels, are available throughout Europe.

Other Points Of Interest

The Dutch MSN site, operated by OD2, contained quite a wide selection of Dutch Music, e.g. Nederlandstalige, Nederpop and Childrens, which distinguishes it from the UK OD2 sites.

The Dutch iTunes site was simply a gateway to the main iTunes site and so it was not necessary to test it separately.

The German T-Online site (musicload) had a German music focus and a small schlager music selection. But it did not stock music from small German labels such as Sky and Erdenklang.

The Sony download site (www.connect-europe.com) was tested as a UK site but further investigation showed that this site is pan European and the same database, containing content from different countries, seems to be universally available. Thus it is possible to find Dutch language music on the UK site, but only via the search engine, it is not listed as a category.

4. Conclusions

Our conclusion is that there is a cultural diversity problem associated with these download sites, which is based on the site's current choice of record labels, rather than a conscious musical choice.

This result reflects the different type of retail operation involved. With a conventional record store (both 'bricks and mortar' or on-line mail order) the retailer has to buy physical items for their basic stock. Under this system they would see no reason to buy 'the whole Naxos catalogue' for example, as much of it would sit on shelves unsold for months. Instead they carefully pick from all the distributors and labels to get an attractive collection. At the same time they will have built up a number of business accounts with these distributors that enables them to purchase individual items for customer orders as required.

The on-line download stores, do not have to buy physical stock and do not have to engage in the complex distribution network. Instead they buy the digital rights. This route clearly lends itself to buying 'complete catalogues' and results in the rather strange results we have found. The other issue is that many of the smaller labels, particularly those dealing with back-catalogues, do not have their catalogue available in digital form. Some of these labels may also be licensing the music from other sources and do not have permission to distribute them to digital distributors.

There is another point to consider. Recordings from the classical record label Chandos can be downloaded in high data rate MP3 format (192kpbs higher than the usual data rate quality found on the Internet) directly from their web site. This format can be played on virtually any music player as nearly all WMA players and the latest Sony and iPod players all support MP3. We have to assume that Chandos are not concerned about the lack of copy protection on MP3, presumably because they are the owners of the material (not licensed from a third party) and because the material is so specialised (classical recordings) it is not a significant problem for their particular catalogue. It could be that other record companies may choose to follow the same route if the major download shops are not distributing their material.

It is also possible that over time, the download shops will sign up some of these smaller companies as the popularity of downloads increases. The danger here is that they may sign up with one download format and not another.

To investigate how the diversity problem is likely to develop in the future we would recommend talking to some of these small/medium sized record companies to find out why they are not in the download catalogues and what their future plans are. We speculate that the reason for this lack of record company representation could be various, (legal, financial, political and technical), and the ultimate choice for inclusion may be with the record company (or music owners) themselves or with the download sites.

We speculate that the download sites will eventually encompass this more diverse content as they are still growing, however, this policy is not clear.

We also speculate that if the business model of the download sites is such that it best supports only new music and individual tracks, for example, then the more diverse music producers may either choose to supply their music in download form themselves, or simply continue to supply it in hardware format (CD, DVD, etc) so the consumer can rip it to their player themselves - free of any copy limitations.