

KEYCHANGE 2021

IN COOPERATION WITH THE MALISA
FOUNDATION

FUNDED BY THE FEDERAL GOVERNMENT
COMMISSIONER FOR CULTURE AND MEDIA

STUDY ON GENDER DIVERSITY IN THE MUSIC INDUSTRY AND IN MUSIC USAGE

REPORT ON THE FINDINGS



KANTAR

funded by



Federal Government Commissioner
for Culture and the Media

LIST OF CONTENTS

01

OBJECTIVE AND
METHODS

02

KEY FINDINGS

03

EQUAL
OPPORTUNITIES IN
THE MUSIC
INDUSTRY

04

MEASURES TO
PROMOTE GENDER
DIVERSITY

05

GENDER
DISTRIBUTION IN
COMPANIES

06

GENDER DIVERSITY
IN THE MUSIC
MARKET

07

CONSUMER SURVEY

08

METHODOLOGICAL
APPENDIX



CHAPTER 1



→ OBJECTIVE
AND METHODS

KEYCHANGE 2021: OBJECTIVE

Given the existing **gender inequalities in the music industry**, the Keychange Initiative sets out to support **talented, under-represented genders** with training courses, mentoring and network support as well as conferences and presentation opportunities at partner festivals.

For the **future strategic orientation and review of existing objectives** within the framework of the Keychange Initiative, a study was carried out to establish the current gender balance in the music industry*. The study placed a specific focus on **attitudes** to themes such as equal opportunities, existing barriers and possible measures, such as the introduction of a quota system for women. For the first time, the relevance of gender diversity was looked at with regard to music usage **from the point of view of consumers**.

*Music industry

The term "music industry" refers to the professional business sector that is involved with the production, advertising and sale of music as a commodity in the economic sense.

COOPERATION WITH THE MALISA FOUNDATION

The MaLisa Foundation was set up in 2016 by Maria and Elisabeth Furtwängler. Its goal is a free, equal society.

It is committed at an international level to the elimination of violence against women and girls. In Germany, it also promotes social diversity and the overcoming of restrictive role models - especially in the audiovisual media and in the music industry.

The MaLisa Foundation uses data to identify where action is needed, develops solutions and works with the industry on their implementation. In cooperation with Keychange and as part of this study on gender diversity in the music industry, the MaLisa Foundation focused its attention on gender-specific barriers and challenges as well as effective measures to promote gender equality in the music industry.

www.malisastiftung.org



STUDY CONCEPT

VARIOUS SURVEYS WERE CONDUCTED AND SUPPLEMENTED WITH INFORMATION FROM EXTERNAL SOURCES



Music industry survey

Online survey of employees of music industry associations participating in the study



Consumer survey

Online survey of music consumers aged 16–69



Expert interviews

Qualitative in-depth interviews with artists, music managers and concert organisers



Further sources

Data from other publications and freely available sources

STUDY PROFILE



Music industry survey

Survey for people involved in the music industry on the themes of equal opportunities, gender-specific barriers, measures to promote gender equality and gender diversity in music marketing

Survey method

Online interviews;
recruitment via participating organisations
(in total 15 organisations, initiatives and educational institutions, see appendix)

Target group and sample

Members of
participating organisations

n=334 interviews

Survey period

12.04. – 09.05.2021

STUDY PROFILE



Expert interviews

Qualitative in-depth interviews with artists, music managers and consumers

In-depth interviews enable profound reflections on personal experiences and offer the chance to address sensitive issues and structural problems

Survey method

Qualitative in-depth interviews (online)

Target group and sample

6 consumers
9 musicians
4 music managers
5 concert organisers
1 radio presenter

n=25 interviews

Survey period

09.04. - 20.04.2021

STUDY PROFILE



Consumer
survey

Survey of music consumers on their current perception of gender equality in the world of music and how they intend to act in future

Survey method

Online interviews;
recruitment via the
Kantar Online Access Panel

Target group and sample

German-speaking population,
aged 16-69,
with internet access

n=2,002 interviews

Survey period

24.08. - 30.08.2021

STUDY PROFILE



Further sources

Complementary sources make it possible to set out the findings in the context of previous research and provide valuable background information

Page 33: BMFSFJ [German Federal Ministry of Family Affairs, Senior Citizens, Women and Youth] On track for equal pay for men and women, 2020; <https://www.bmfsfj.de/quote/einstieg.html>

Page 38: German Federal Statistical Office 2019/2020

Page 40: Melissa Panlasigui: Women in High-Visibility Roles in German Berufsorchester, Munich 2021 (musica femina münchen and Archiv Frau und Musik-Sonderveröffentlichung [Archive of Women in Music - Special Edition])

Page 42: German Federal Statistical Office/DIW Weekly Report No. 9/2021

Page 45: GfK Entertainment 2018, <https://www.dw.com/de/wie-weiblich-ist-die-deutsche-popmusik/av-45596303>

Page 48: FACTS survey, by the female:pressure Trouble Makers, November 2020

PRELIMINARY REMARK

Gender

In the course of the survey, the gender of participants was recorded. In addition to the options of "male" and "female", it was also possible for them to identify as "non-binary". Due to a very low number of cases (n=4), however, this group **cannot be shown separately**. As a result, the findings below are only shown **separated into men and women**.

Gender diversity

By "gender diversity" we mean a **mix** of, for example, male, female and non-binary artists, **which includes all genders** (i.e. not only those who feel they belong to a certain gender, but also all those who do not identify as a specific gender). In relation to music, the **balanced presence of all genders** means e.g. with regard to their appearance at festivals.



CHAPTER 2



→ KEY FINDINGS

KEY FINDINGS

THERE IS A NEED FOR ACTION WITH REGARD TO EQUAL OPPORTUNITIES FOR MEN AND WOMEN IN THE MUSIC INDUSTRY.

Existing gender inequalities

- Women are critical about the status quo in terms of equal opportunities in the music industry. Only approx. one in seven women in our sample feels that men and women have the same opportunities. Men and women rate equal opportunities in the music industry very differently.
- Almost every female respondent in the music industry has already experienced discrimination in relation to her gender.
- Women think they face much greater barriers to their professional development than men, especially stereotypes, prejudice and male cliques.
- This all has a detrimental impact on the careers of women, which is revealed not least in the fact that women are less often represented in management positions and earn less on average than men.



Measures for Improvement

- The young generation is key: most respondents consider the targeted support for youngsters with a view to gender equality to be sensible. Mentoring and female networks are also considered to be useful.
- To date, however, too few measures have been sufficiently well implemented. Effective measures are therefore required to eliminate the biggest obstacles such as "nepotism" and stereotypes – quotas could be an appropriate way of doing this.
- Around half of women are in favour of quota systems for concerts/festivals and executive roles. Only around one in three men is in favour of this measure.

KEY FINDINGS

MUSIC CONSUMERS ARE NOT GENERALLY AWARE OF GENDER DIVERSITY, BUT IT WILL BECOME INCREASINGLY RELEVANT.

Gender diversity and music marketing

- Most of the respondents in the music industry are of the opinion that a high degree of gender diversity improves the quality of the music and has a positive impact on its marketing.
- Fewer than half believe that music consumers currently expect diversity already or that this is a purchase criterion. Around one in three now feels that there is a pressure from music consumers who demand gender diversity.
- Less than half are currently in favour of a fixed quota, for example for concerts or radio airplay.



The consumer point of view

- Music consumers are generally not yet aware of gender diversity. Around one fifth consciously focus on the representation of women and non-binary people in music and base their buying decisions on that.
- However, there are clear differences based on age. It is predominantly younger consumers aged 16-29 who consider gender diversity highly relevant.
- In future, the subject of gender diversity will become more important: a third of respondents would like the subject to be discussed more widely in public. Almost half of the younger respondents would like this to be the case.
- Consumers consider the responsibility for this lies primarily with the music industry, but many are also ready to shoulder some of the responsibility for it themselves.

KEY FINDINGS

CREATING VISIBILITY IN THE MUSIC INDUSTRY AND IN MUSIC MARKETING.

Conclusion

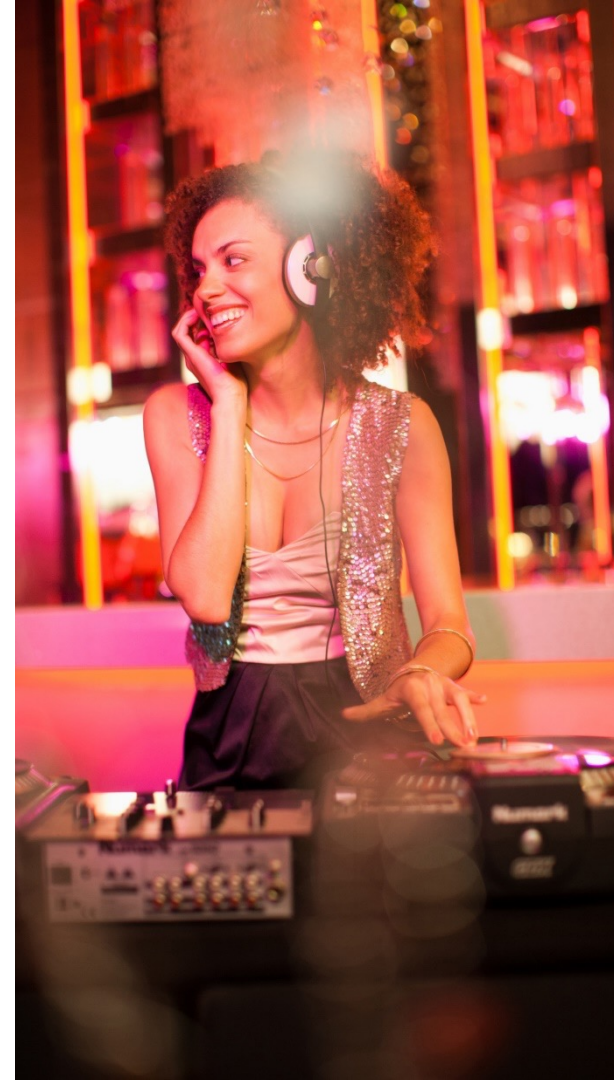
It is essential to create more visibility for women and gender minorities in the music industry and to open up opportunities.

The quota could be an interesting way of producing more gender equality. Empirical examples show that where quotas have been introduced the proportion of women increases.

Mentoring and female networks are also considered to be useful. Female networks alone will probably not be enough to end the exclusion of women from existing, male-dominated networks. Mixed networks of men and women seem more likely to be the way forward.

The measures require a change of attitude and a greater willingness on the part of key players in the music industry to take risks. Moreover, the assumption is that younger generations of music consumers will also press for changes and greater diversity in music.

Ultimately, it is up to the music industry itself to create external visibility for gender diversity in its marketing by offering the corresponding music products, introducing the concept of quotas and signing voluntary commitments. Consumers alone cannot achieve this, as it is still difficult at present to orient the purchase or reception of music towards gender balance.



CHAPTER 3



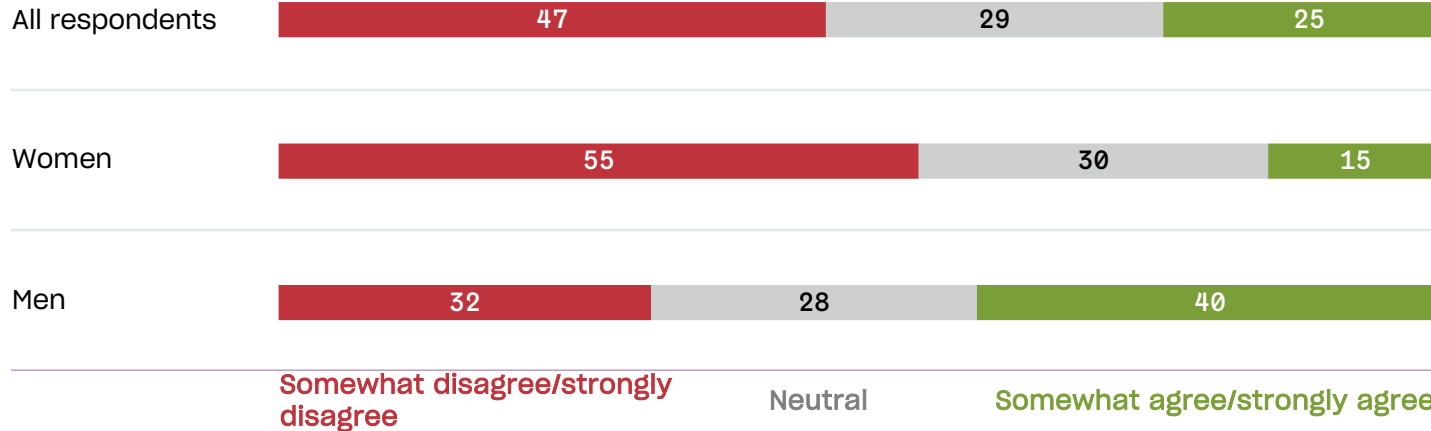
→ EQUAL OPPORTUNITIES
IN THE MUSIC INDUSTRY

EQUAL OPPORTUNITIES

THERE ARE LARGE DIFFERENCES IN PERCEPTION BETWEEN MEN AND WOMEN:
ONLY ONE WOMAN IN SEVEN SEES EQUAL OPPORTUNITIES.



"Men and woman in Germany have the same opportunities in the music industry."



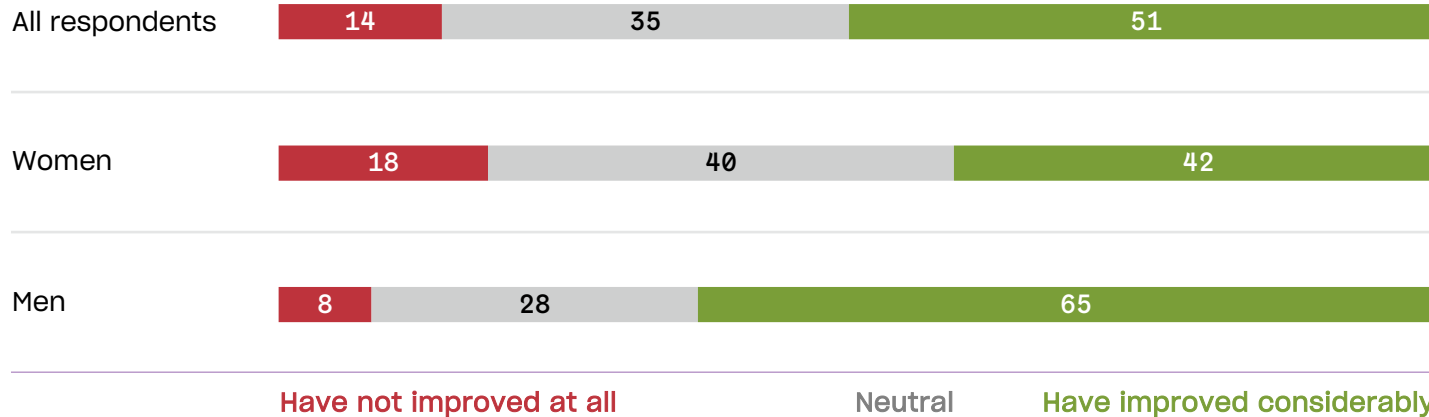
Question: To what extent do you agree with the following statement: Men and woman in Germany have equal opportunities in the music industry; expressed as a percentage; Top2 (Strongly agree/somewhat agree)
Source: Music industry survey, basis: all respondents (n=334 interviews), men: n=130, women n=197

EQUAL OPPORTUNITIES

TWO-THIRDS OF MEN SURVEYED, BUT LESS THAN HALF OF WOMEN SURVEYED, PERCEIVE AN IMPROVEMENT.



"Has there been an improvement in equal opportunities in the music industry in the last 5 years?"



Question: Do you think that equal opportunities for men and women in the music industry have improved in the last 5 years? Expressed as a percentage; Top2 (have improved (considerably)/have not improved (at all))
Source: Music industry survey, basis: all respondents (n=334 interviews), men: n=130, women: n=197

EXPERIENCES

ALMOST EVERY WOMAN SURVEYED HAS ALREADY HAD GENDER-SPECIFIC EXPERIENCES IN THE PROFESSIONAL ENVIRONMENT OF THE MUSIC INDUSTRY.



"Gender-specific experiences at work"

WOMEN

96%



MEN

65%



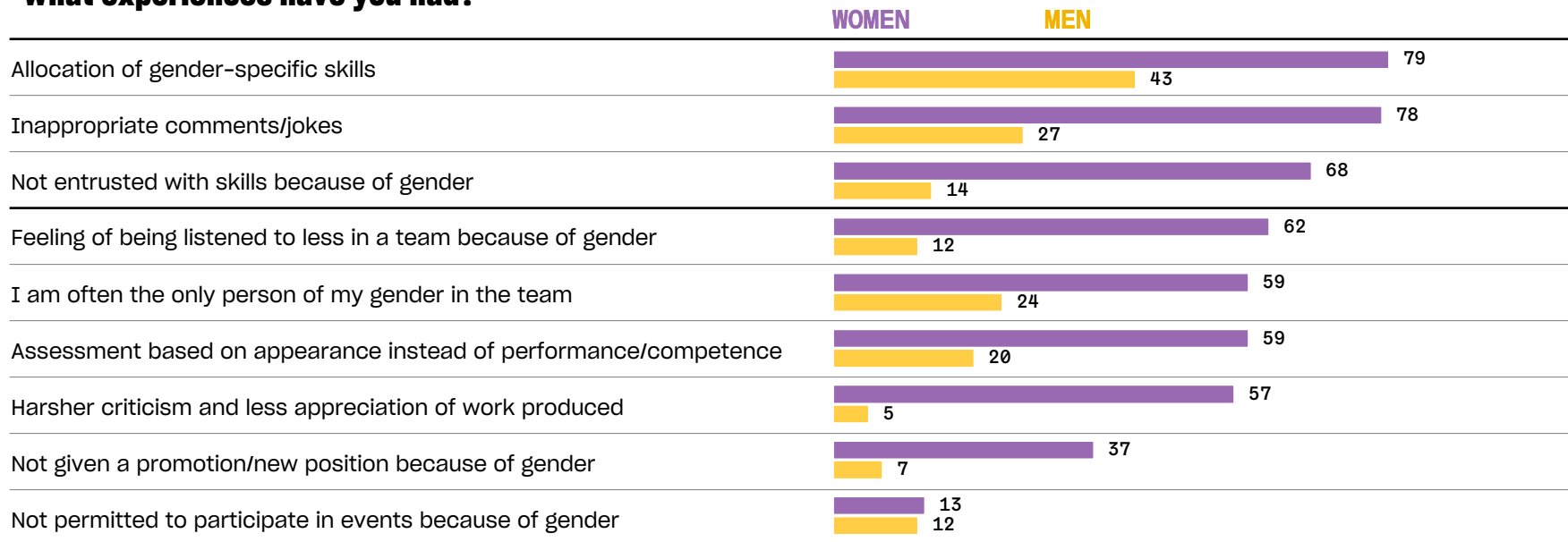
Question: Which of the following experiences have you already had in a professional context?
Source: Music industry survey, basis: all respondents (n=334 interviews), men: n=130, women: n=197

EXPERIENCES



THE MOST COMMON EXPERIENCES FOR WOMEN WERE THE ATTRIBUTION OF GENDER-SPECIFIC CHARACTERISTICS AND INAPPROPRIATE COMMENTS. WOMEN ARE OFTEN SEEN AS LESS CAPABLE.

"What experiences have you had?"



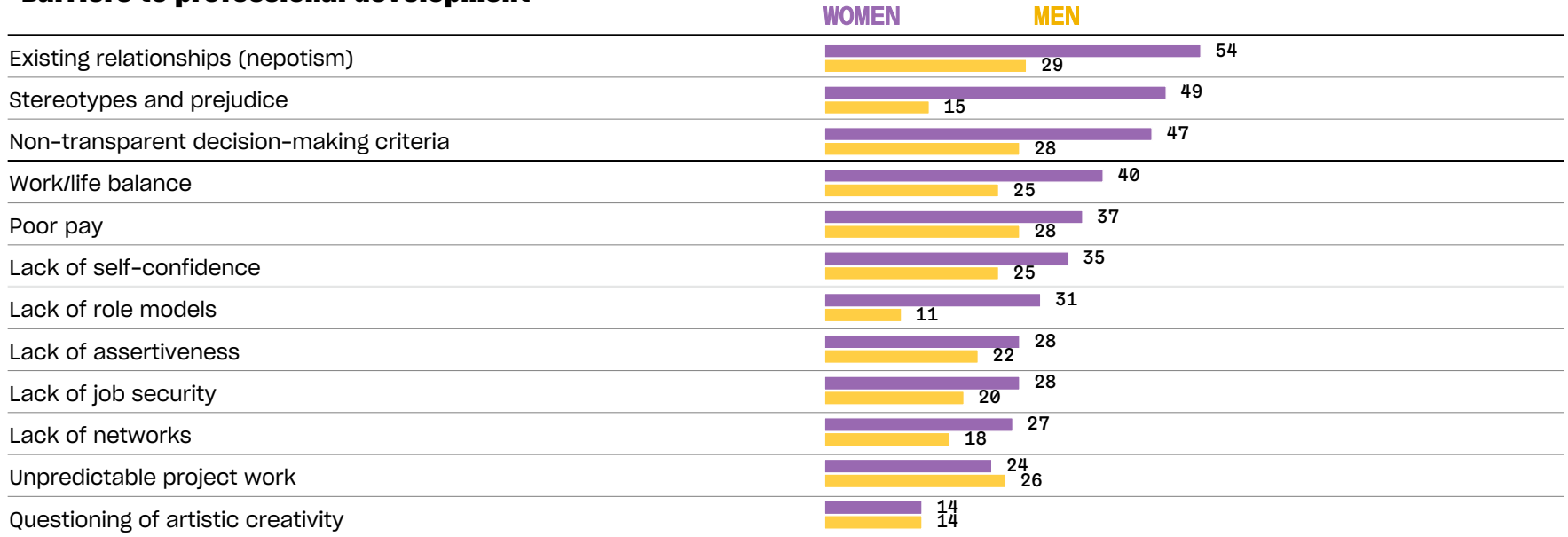
Question: Which of the following experiences have you already had in a professional context? Expressed as a percentage
Source: Music industry survey, basis: all respondents (n=334 interviews), men: n=130, women: n=197

BARRIERS

THE TOP 3 BARRIERS STATED WERE NEPOTISM, LACK OF TRANSPARENCY AND STEREOTYPES.



"Barriers to professional development"



Question: What barriers do you face in your professional development? Expressed as a percentage; Top2 (major/slight barrier)
Source: Music industry survey, basis: all respondents (n=334 interviews), men: n=130, women: n=197

LACK OF WILLINGNESS TO

TAKE RISKS

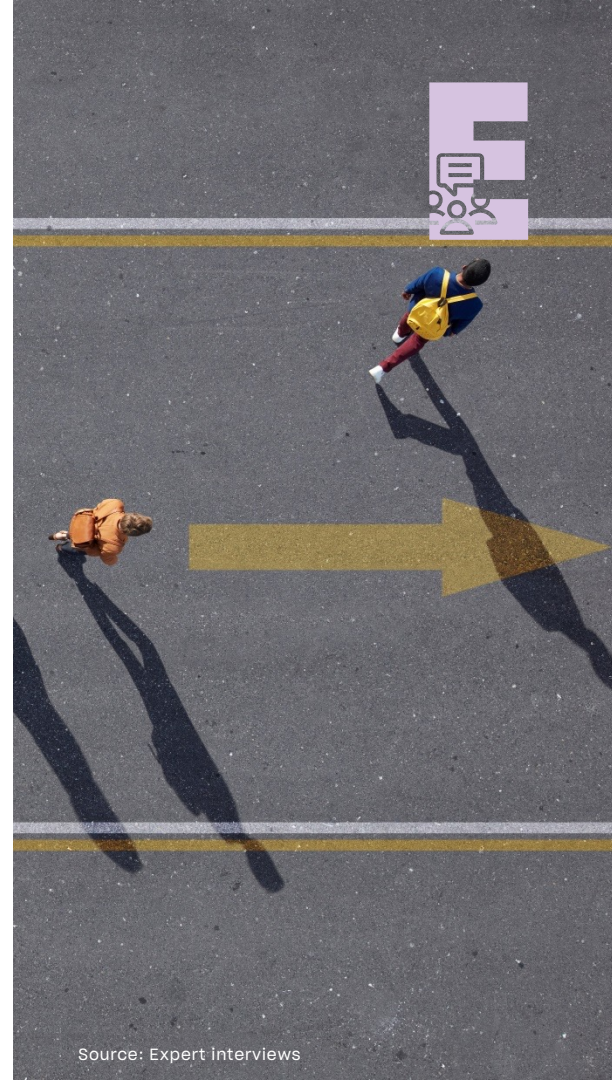
BUILD DECISIONS ABOUT CAREER DEVELOPMENT ARE SELDOM MADE BY FEMALE ARTISTS OR THOSE FROM GENDER MINORITIES.

The **music industry** is frequently described by respondents as **risk-averse**: the actions of those involved are often interpreted as **risk avoidance**. They usually **fall back on tried-and-tested approaches** or what has been successful in the past. This is apparent, for example, in the choice and line-up of band members and the selection of artists at festivals.

The risk-averse approach is justified by managers, event organisers and bookers by claiming that the **music industry is a financial "risky business"**, which is heavily linked to various **financial dependencies**.

This aversion to risk also affects women when it comes to **positions and roles in music management**. **The stereotypical allocation of skills and character traits means that success in the "tough" music business tends to be associated more with men than women**. The music industry is described as tough and risky, which men are seen as more capable of managing due to the stereotypical image of the dominant and self-confident man - **"you need to be tough, have a fighting spirit"**.

Furthermore, men tend to be **more willing to take or share risks with their peers, usually other men**, than with women. Here, too, women often feel marginalised by their male colleagues.



STEREOTYPING

MEN ARE OFTEN SEEN AS HAVING CHARACTERISTICS RELEVANT TO SUCCESS, WHILE WOMEN ARE OFTEN VIEWED AS HAVING "WEAKER" ATTRIBUTES.

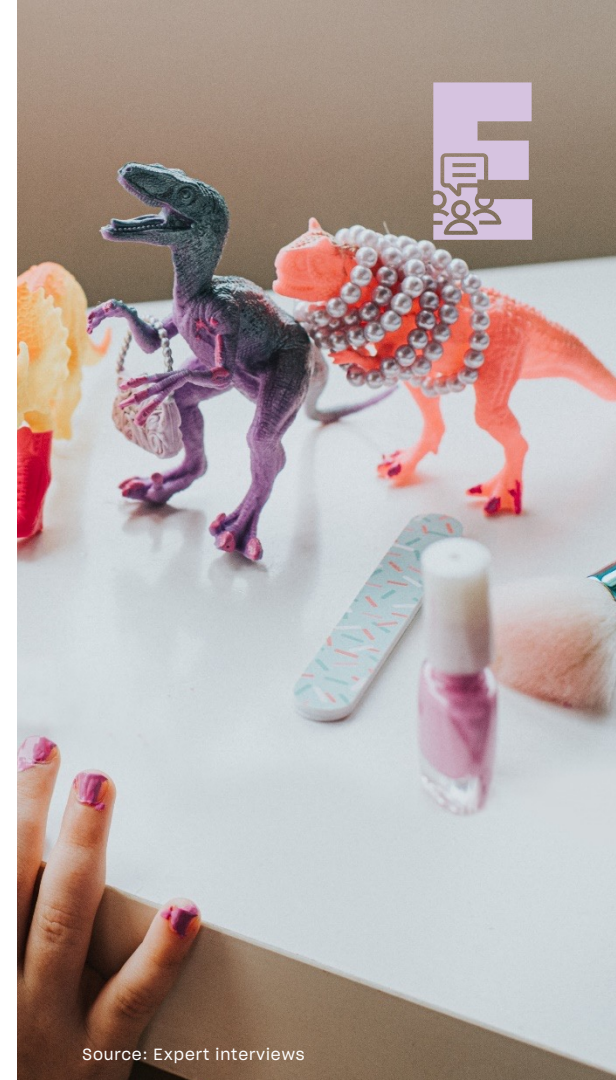
Unlike women, men are often seen as having those **attributes that count as relevant to success in the industry**: bolder, more self-confident, a certain arrogance, less complicated, greater physical endurance. **Characteristics attributed to women tend to be seen as weaknesses in the industry** - "being their own worst enemy", more cautious, more willing to compromise, more polite, more considered, less confident.

This stereotyping has an impact on the careers of female musicians. This can be seen in the fact that **professional prospects for women in the music industry are often restricted to certain areas** - singer, backing vocals, dancer, administration for managers and event organisers.

Women and men also report that **women are rated and marketed by their appearance far more strongly than men**.

Furthermore, **women tend to market themselves and their appearance more strongly and "more astutely" in social media**, although there was no deeper scrutiny of the extent to which this is a strategy to attract attention that has simply been accelerated by the lack of alternatives.

At the same time, **women are often not taken seriously but merely reduced to their appearance**, or reduced to the assumption that their musical success is to a large extent more down to successful self-promotion and marketing on Instagram than to their musical talent.



MALE NETWORKS

MEN LIKE TO KEEP TO ALL-MALE NETWORKS, WOMEN ARE FREQUENTLY SEEN AS "OUTSIDERS" AND ARE EXCLUDED FROM MALE NETWORKS.

The **importance of networking contacts** and the **dependence on male opportunity-givers** represent a **significant barrier** for women. It makes it harder for them to access and retain links with male networks.

Women and men report that **men like to mix with other men**. It is often in casual male get-togethers ("hanging out after a gig", "having a beer with the lads", "hanging out in the recording studio") that important decisions are made, collaborations agreed, mutual trust established, etc. - in other words, where networks are formed.

In these male bonding sessions, women tend to be perceived as irritating. As a result, many women feel pressured to display supposed "masculine" characteristics and attitudes in order to be accepted.

Women are therefore frequently at a disadvantage in terms of information and relationships **compared to the close-knit male networks**. In addition, close contact between men and women is quickly regarded in a sexual context. All this makes it harder for women to access male networks.



CHALLENGES

THE EXPERT INTERVIEWS REVEAL
THREE KEY CHALLENGES.



LACK OF WILLINGNESS TO TAKE RISKS



To avoid risk, female artists and those from gender minorities rarely make bold decisions about career development.

STEREOTYPING



Men are often assigned attributes considered relevant to success in the industry. Women are associated with weaker attributes and reduced to their appearance.

MALE NETWORKS



Women are excluded from male networks, and this hinders their career development.

CHAPTER 4

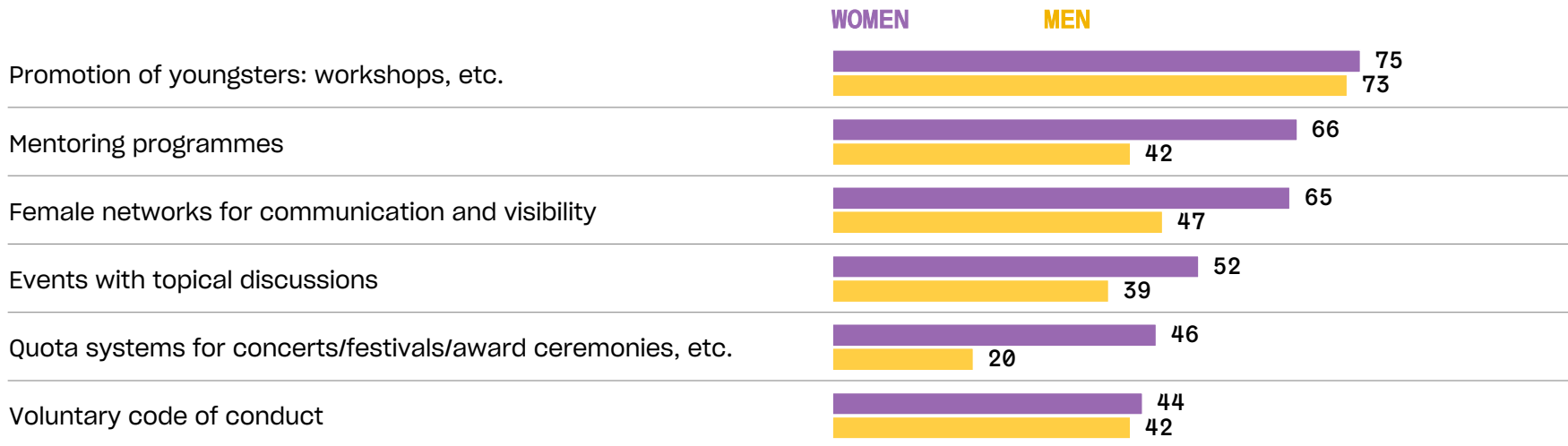


→ MEASURES TO PROMOTE
GENDER DIVERSITY

USEFUL MEASURES



THREE-QUARTERS OF RESPONDENTS CONSIDER IT REASONABLE TO PROMOTE YOUNGSTERS. ALMOST HALF OF THE WOMEN ARE IN FAVOUR OF QUOTA SYSTEMS. AMONG MEN IT IS ONLY A MINORITY.

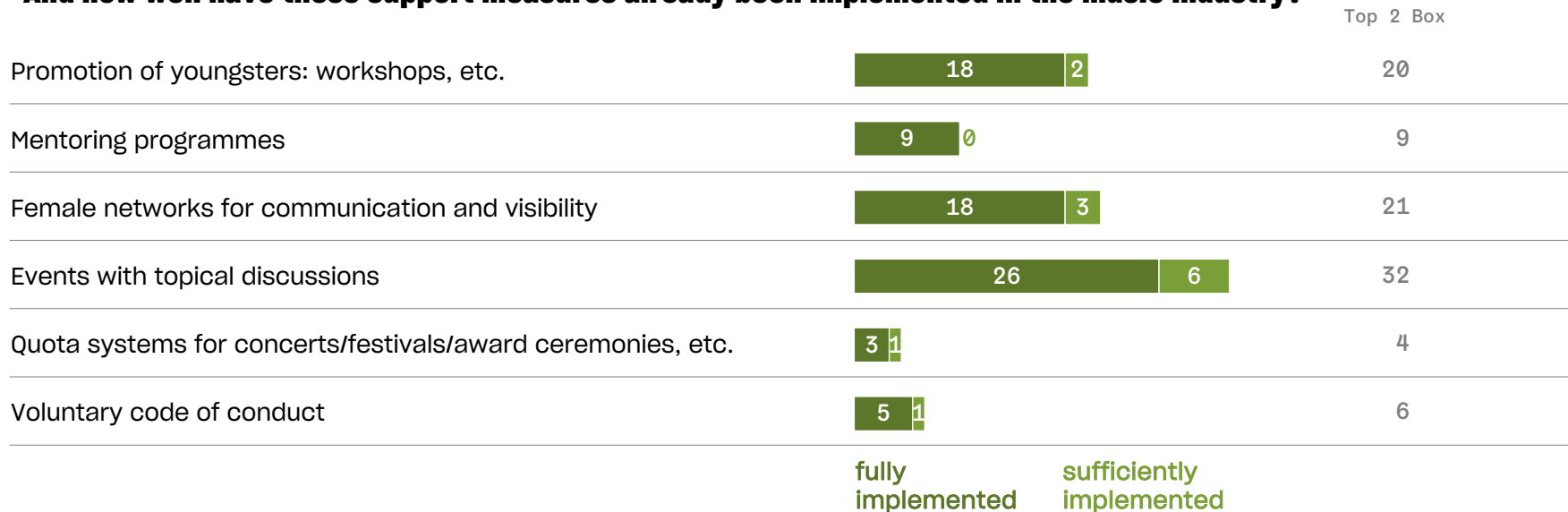


Question: Which of the following measures to promote gender equality do you consider useful? Indicated as a percentage
Source: Music industry survey, basis: all respondents (n=334 interviews), men: n=130, women: n=197

IMPLEMENTATION OF MEASURES

VERY FEW RESPONDENTS CONSIDER THAT THE MEASURES HAVE ALREADY BEEN ADEQUATELY IMPLEMENTED. THE STRONGEST AGREEMENT IS FOR EVENTS AND TOPICAL DISCUSSIONS.

"And how well have these support measures already been implemented in the music industry?"



Question: And how well have these support measures already been implemented in the music industry? Expressed as a percentage; Top2 (fully/sufficiently implemented)

Source: Music industry survey, basis: all respondents (n=334 interviews)

MEASURES

NETWORKS, MENTORING PROGRAMMES AND DISCUSSIONS ARE IMPORTANT AND SUPPORTIVE, BUT OVERALL THERE IS A NEED FOR MORE EDUCATIONAL WORK.

In parallel with the discussion about gender equality in the music industry, the **topic is being addressed in more and more areas of society** (e.g. politics, business, sport). According to respondents, this general trend is the main reason for the changes in the music industry. However, it is likely to take several generations for equality to be achieved in this way.

To support the trend that is already underway, it is necessary not only to support young people but also to **further drive a change of attitudes in society**. This includes making consumers more open to new artists and achieving a contemporary mindset at management level, which is free from rigid and outdated patterns and clichés.

Event organisers and managers also need to show more courage when putting together surprising line-ups, and to have a more open and diverse eye for talent instead of making safe decisions based on monetary factors.

This requires **timely education and the relaying of important values** such as tolerance and openness alongside the blurring of typical male/female roles.



CREATING AWARENESS

RESPONDENTS WANT THERE TO BE MORE AWARENESS OF THE TOPIC OF GENDER MINORITIES IN THE WORLD OF MUSIC.

Most of the experts surveyed are initially in favour of more awareness of the **topic of women and gender minorities - both among musicians and listeners**. In a creative industry which has few objective decision-making criteria, making those involved aware of their own stereotyping can have a positive effect on equal opportunities.

This includes **monitoring the actual gender differences** of line-ups at festivals or on music programmes **and providing the relevant information about shortcomings**. This would be a way for the industry to **hold a mirror up to itself** in terms of diversity and openness.

There is furthermore a desire to **create opportunities for women to form their own networks**, so they can come together to develop new ideas and create long-term opportunities to act outside classic role assignments and relationships of dependency.

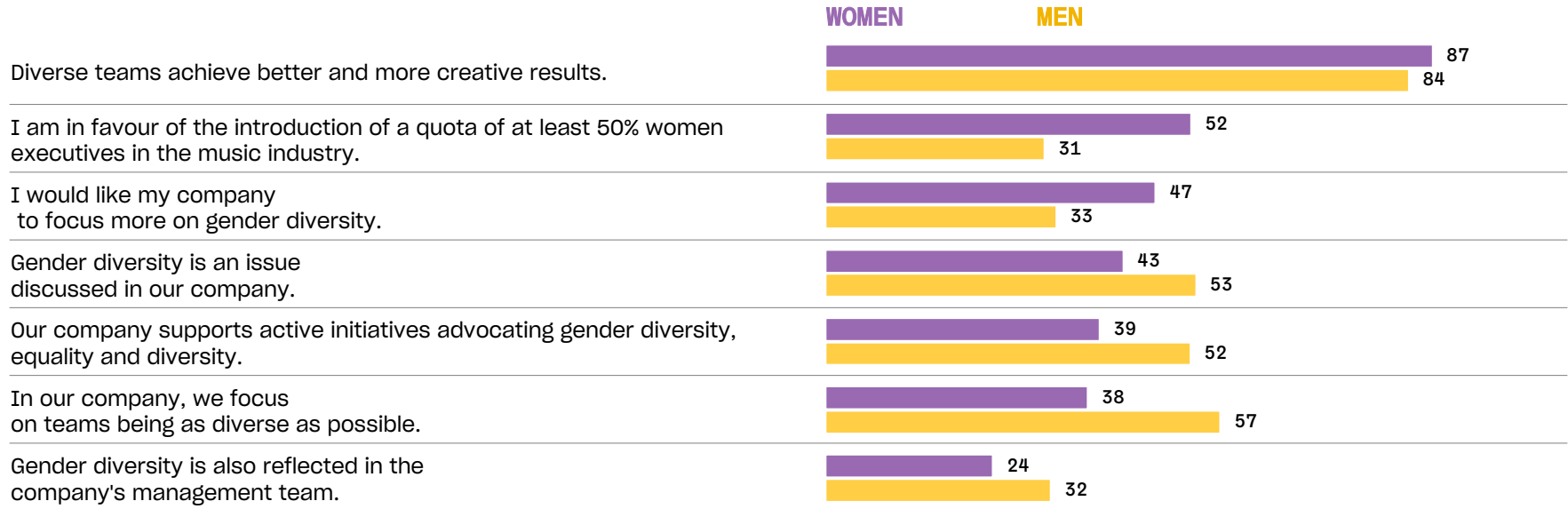
Support measures for the training of managers and event organisers should also serve to promote the formation of networks that are not male-dominated and boost the entry of women by **minimising financial risk**.



PROMOTING DIVERSITY



MOST PEOPLE FIND THAT MIXED TEAMS ACHIEVE BETTER RESULTS. MEN ARE MORE LIKELY THAN WOMEN TO THINK THAT GENDER DIVERSITY HAS ALREADY BEEN DISCUSSED AND IMPLEMENTED IN COMPANIES.



Question: To what extent do you agree with the following statements about the issue of gender diversity in relation to your company? Expressed as a percentage; Top2 (strongly agree/somewhat agree)

Source: Music industry survey, basis: music industry employees, including students/trainees, (n=293 interviews), men: n=115, women: n=176

QUOTA SYSTEM FOR WOMEN?

THE EXPERTS ARE DIVIDED. THERE IS A LOT OF SCEPTICISM, ALTHOUGH THE QUOTA SYSTEM AS A USEFUL MEASURE IS NOT QUESTIONED.

Participants from all areas of music in the survey were **divided** on the issue of a quota system for women. On the one hand there was unanimity about the **bad reputation of the quota system**, on the other, most respondents feel it is important **for something to be done** to counter the current situation.

Even though everyone feels that **quality is more important than a quota**, it is also clear to them that the current unequal treatment and unequal gender distribution **are not due to poorer quality of the women**. This makes the discussion so difficult for respondents, yet also makes a countermeasure so necessary.

For most respondents, the quota system flags up a further weakness: it only applies to the staffing of certain positions or events when it is already **too late**. **It is necessary to take measures earlier** that allow women to show their talent and their quality, and this would **make quotas unnecessary in the long run**.

Another factor that must not be ignored here is the **objection of many male participants**. They fear that general quotas could, due to the fact that there is currently a smaller and possibly weaker pool of women available, disadvantage very good male artists.



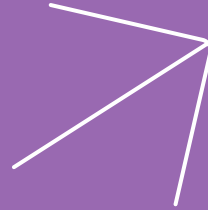
QUOTAS WORK

THE EXAMPLE OF QUOTA SYSTEMS FOR SUPERVISORY AND EXECUTIVE BOARDS SHOWS THAT QUOTA SYSTEMS HELP TO INCREASE THE PROPORTION OF WOMEN.



35.2%

**Proportion of women on supervisory boards in the top 200 companies with a quota system (30%).
Proportion of women without a quota system: 23.3%**



13.2%

Increase in the proportion of women on supervisory boards since the introduction of the quota system in 2015



39.6%

**Proportion of women on executive boards in companies with a quota system
Proportion of women without a quota system: 10.4%**

CHAPTER 5



→ GENDER DISTRIBUTION
IN COMPANIES

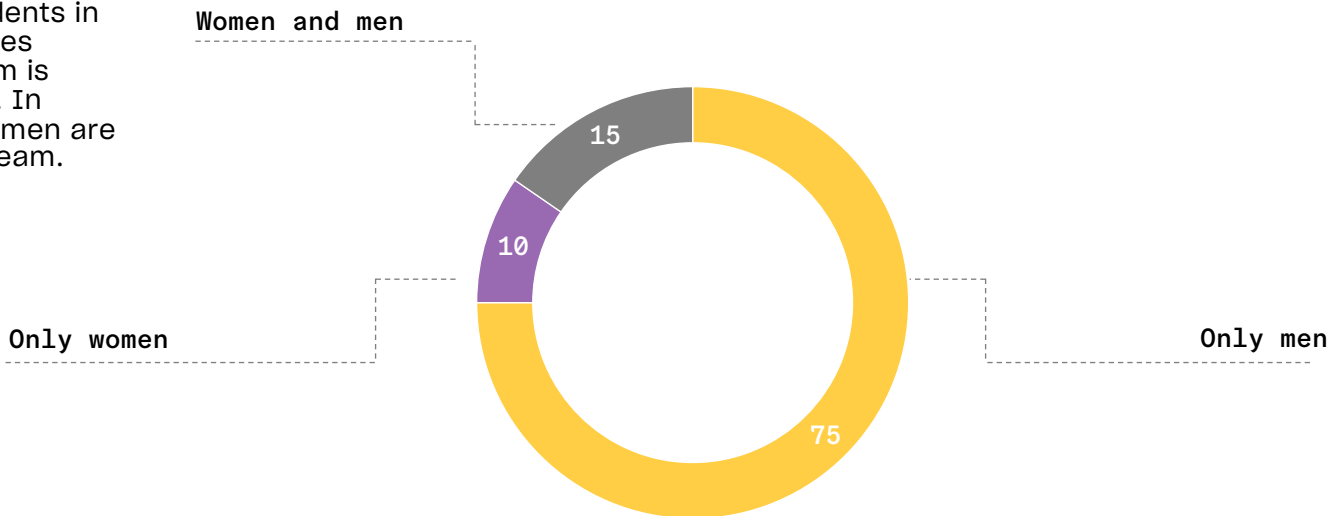
COMPANY MANAGEMENT

THE VAST MAJORITY OF RESPONDENTS WORK IN COMPANIES WHERE MEN HOLD THE EXECUTIVE ROLES.



"Gender ratio in management"

The vast majority of respondents in our sample work in companies where the management team is exclusively made up of men. In around quarter of cases, women are (also) on the management team.



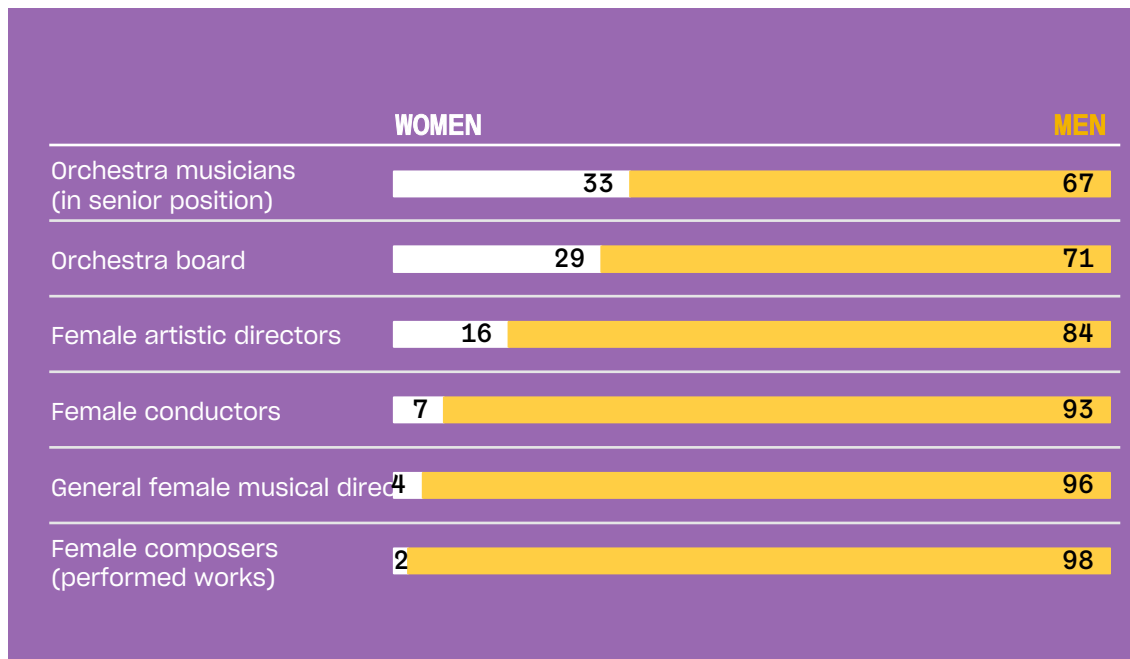
Question: And who runs your company? / What does the management team of your company look like with regard to women and men? Expressed as a percentage
Source: Music industry survey, basis: music industry employees with 2 or more employees in the company (n=272 Interviews)

WOMEN IN MANAGEMENT POSITIONS



"What do other sources say?"

The study carried out by Panlasigui (2021) takes the example of the orchestra in Germany to show how much women are under-represented in leading positions.



GENDER PAY GAP

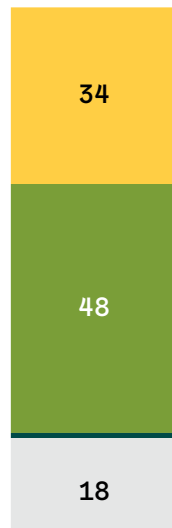
A THIRD OF WOMEN THINK THAT MEN IN COMPARABLE JOBS ARE PAID MORE THAN THEY ARE. MEN ARE LIKELY TO CONSIDER THAT MEN AND WOMEN ARE PAID THE SAME.



Subjective assessment

WOMEN

Men in my job earn on average...

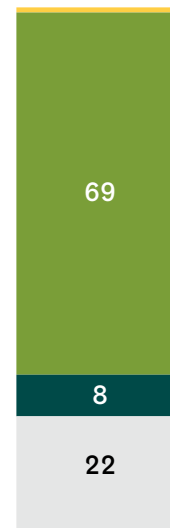


more
the same
less
Don't know

Subjective assessment

MEN

Women in my job earn on average...



GENDER PAY GAP MUSIC

THE GENDER PAY GAP FOR JOBS IN THE MUSIC INDUSTRY IS HIGHER THAN THE GERMAN AVERAGE OVER ALL INDUSTRIES.



"What do other sources say?"

The gender pay gap for jobs in the music industry is compared with jobs in the performing arts, visual arts and the written word.

The figures for jobs in the music industry are based on data from the artists' social insurance fund, which provides information about insured parties' income for their independent artistic work.



19%

**Gender pay gap in Germany,
average across all industries***



25%

**Gender pay gap
for jobs in the music industry****



CHAPTER 6



→ GENDER DIVERSITY IN
THE MUSIC MARKET

DISTRIBUTION OF REVENUES

ACCORDING TO ESTIMATES BY THE MUSIC MANAGERS SURVEYED, FEMALE ARTISTS MAKE UP AROUND ONE THIRD OF THE TOTAL REVENUES.



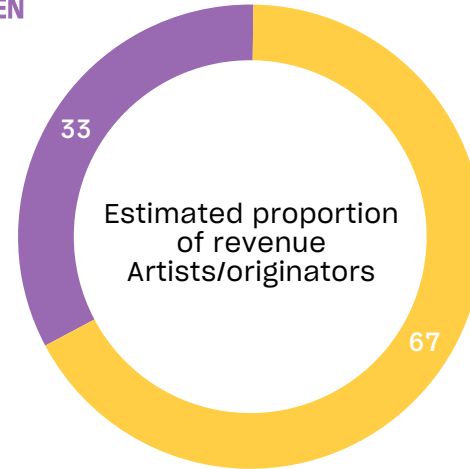
"Revenue proportion of artists/originators"

(Subjective expert estimates by music managers surveyed)

Women are apparently also under-represented in music marketing. Less than half the total revenue goes to women. The proportions shown here are expert estimates by music managers who took part in the survey.

WOMEN

MEN



Question: What proportion of your total revenue is generated by female artists/originators and what proportion by male artists/originators?
Source: Music industry survey, basis: self-employed/freelancers, managing directors or executives (n=113)

POP MUSIC: PROPORTION OF WOMEN

WOMEN ARE UNDER-REPRESENTED IN THE AREA OF POP MUSIC: ONLY A FEW ARTISTS AND ORIGINATORS PROFIT FROM THE REVENUES.



"What do other sources say?"

The proportion of solo female artists has been steadily dropping over the last 10 years.*

Above all, the proportion of played works by female composers and lyricists in the radio charts is very low at 10%.**



29%

is the proportion of solo female artists in the German album charts.



10%

of the songs played on the radio were written by women.



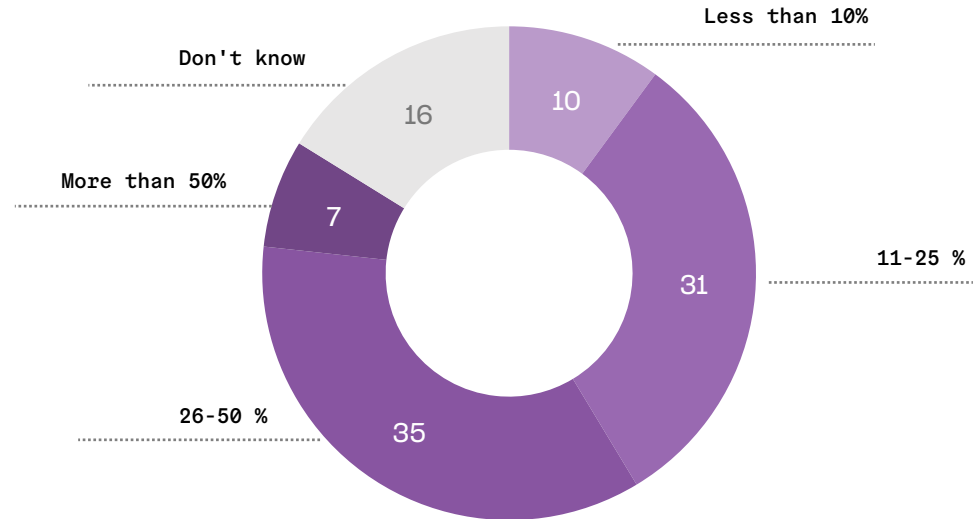
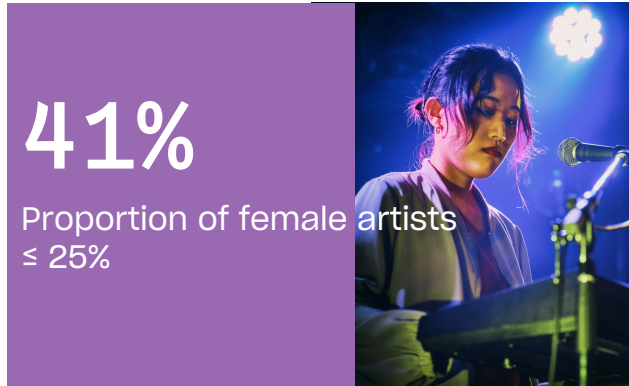
CONCERT STAGES



OVER 40% OF RESPONDENTS FROM THE AREA OF LIVE MUSIC ESTIMATE THAT THE PROPORTION OF FEMALE ARTISTS BOOKED FOR CONCERTS IS LESS THAN 25%.

"Estimated proportion"

Female artists at concerts and festivals



Question: Think about the bookings for male and female artists for events, concerts, festivals, etc. How high on average is the proportion of female artists booked? Expressed as a percentage
Source: Music industry survey, basis: respondents from the sub-category music events (live music), n=198

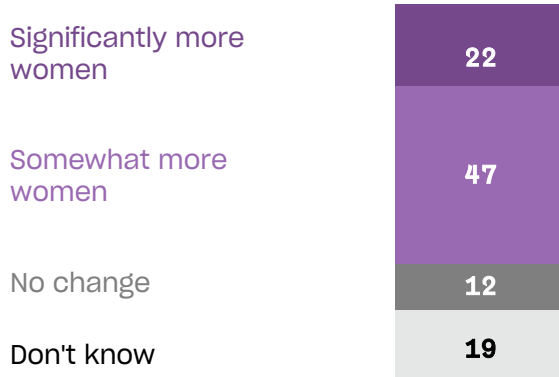
CONCERT STAGES

THE VAST MAJORITY ALSO ESTIMATE THAT THE PROPORTION HAS GONE UP IN THE LAST 10 YEARS.



"Subjective estimate:"

Change of proportion in the last 10 years



Question: And has the proportion of female artists at concerts and festivals changed in the last 10 years? Expressed as a percentage
Source: Music industry survey, basis: respondents from the sub-category music events (live music), n=198

CONCERT STAGES

THE FACTS SURVEY BY FEMALE:PRESSURE ESTABLISHES THAT WOMEN ARE SIGNIFICANTLY UNDER-REPRESENTED ON FESTIVAL STAGES.

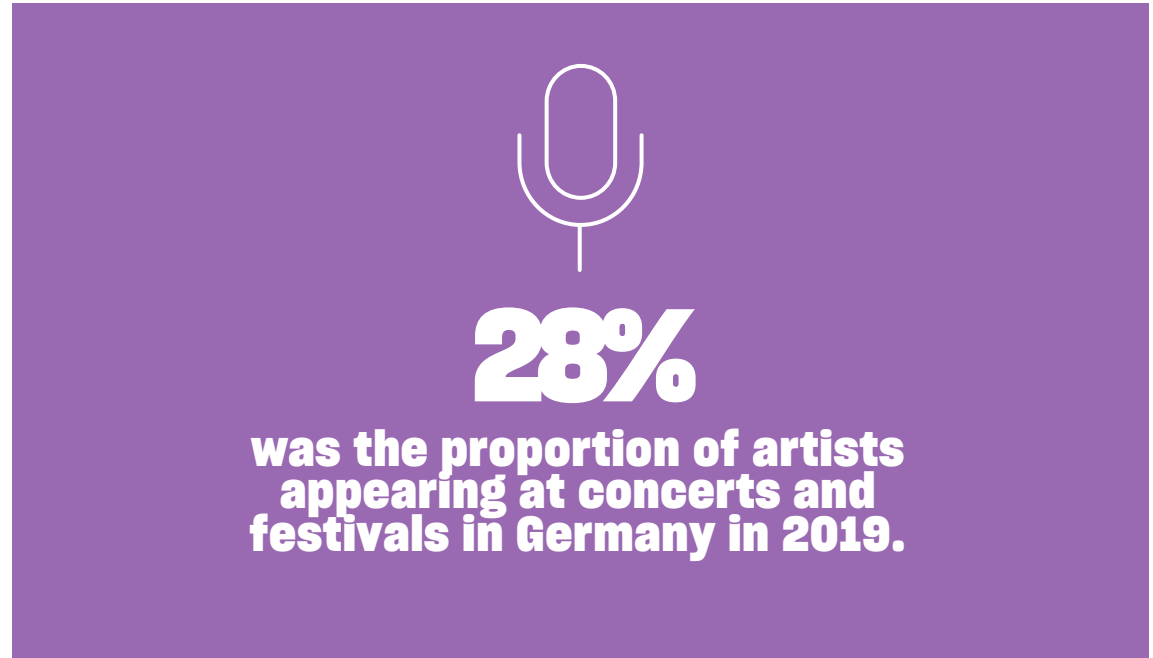


"What do other sources say?"

In the FACTS survey produced by the female:pressure initiative, 1056 acts were assessed for their proportion of women.

The study showed that in Germany in the year 2019 female artists only made up around a quarter of appearances at festivals and concerts.

A further finding from the study is that the proportion of female artists at smaller festivals is greater than at big events.



Source: FACTS survey, by the female:pressure Trouble Makers, November 2020
"1056 acts were assessed, "acts" being defined as "musical and visual artists or bands who appear on stage, as they are listed in the festival's programme line-up".

NEWCOMERS



A SMALL MAJORITY FEELS THAT THERE IS MORE GENDER DIVERSITY AMONG NEWCOMERS THAN AMONG ESTABLISHED MUSICIANS.

Newcomers represent a **greater gender diversity** than is the case with established artists. 55

The **proportion of women is higher** among newcomers than among established artists. 44

Female newcomers have to make more of an effort than male newcomers to be taken seriously and to become successful. 40

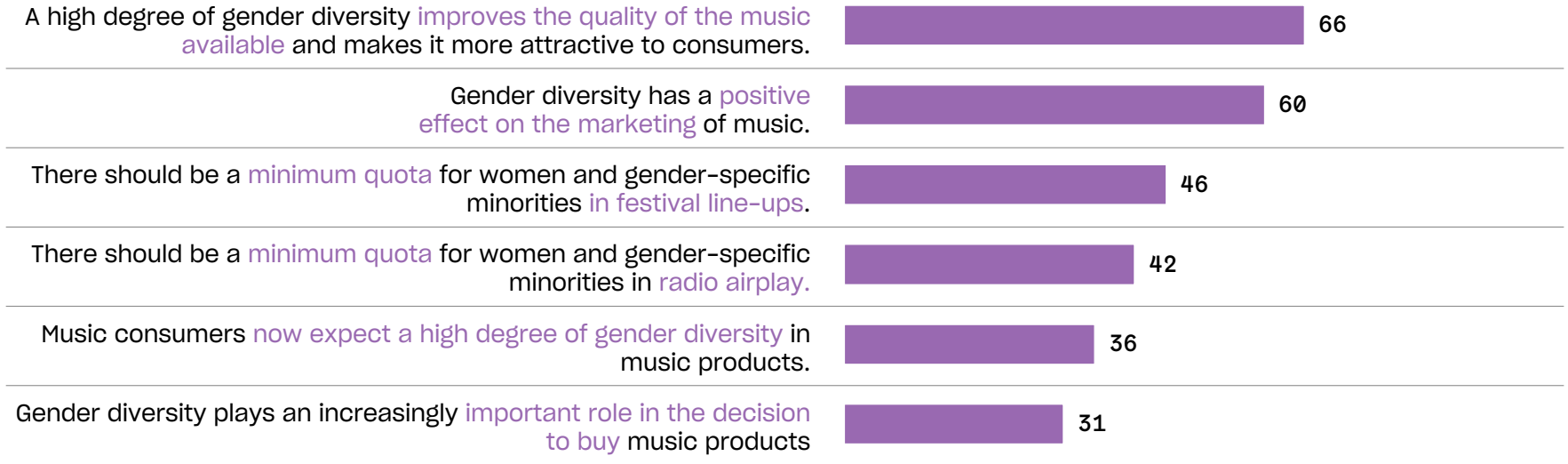
It is easier for **female newcomers** to get signed up today than it was 10 years ago. 37

On average, female newcomers are offered worse conditions than male newcomers. 20

DIVERSITY AND MARKETING



THE MAJORITY THINK THAT GENDER DIVERSITY HAS A POSITIVE EFFECT ON THE QUALITY AND MARKETING OF THE MUSIC AVAILABLE.



Questions: To what extent do you think the following statements about newcomers in the music industry apply? Expressed as a percentage; Top2 (strongly/somewhat agree)
Source: Music industry survey, basis: all respondents (n=334 interviews)

LACK OF DIVERSITY

ACCORDING TO THE ESTIMATES OF EXPERTS, MANY GENRES ARE DOMINATED BY MEN. THE PROPORTION OF WOMEN HAS INCREASED, BUT THERE ARE STILL MANY GENDER CLICHÉS.

A **general increase in women in various music genres is perceived by all participants** but with a wide variation in the degree of change.

In **classical music and orchestras there is clear male dominance**, including on instruments often associated with women (flute, clarinet), since in such a large ensemble the issue of work-life balance is seen as especially critical, and it would seem that young women face particularly high barriers to get started in this area as a result.

Rock, punk or grunge are associated with a completely different **lifestyle (rock star existence)**, which is not attributed to women and is seldom seen as authentic.

Other "typical male genres" that have seen considerably more women in their ranks in recent years include rap and techno/electro. Even in these areas of music, the **success of female artists is all too often ascribed to their appearance or their provocative and sexualised self-promotion in social media.**



CHAPTER 7



→ CONSUMER SURVEY

AWARENESS

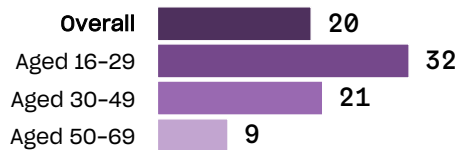
ONE IN FIVE CONSUMERS IS PAYING MORE ATTENTION TO THE REPRESENTATION OF WOMEN AND NON-BINARY PEOPLE IN MUSIC PRODUCTS.



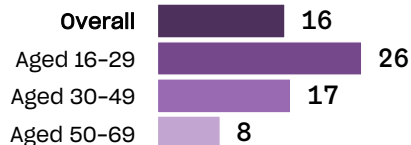
I think that around the same number of songs by male and female artists are played on the radio.



I pay more attention to the representation of women and non-binary people in music.



When buying music, I pay attention to the gender of the artist and also base my decision about whether or not to buy on that.



Question: Please think about gender diversity in different music products. Based on your experience, to what extent do you think the following statements apply? Expressed as a percentage: Top2 (completely/somewhat applies)
Source: Consumer survey, basis: regular music consumers (at least once a month) (n=1,921 interviews); aged 16-29 (n=487), aged 30-49 (n=787), aged 50-69 (n=647)

FOCUS: STREAMING

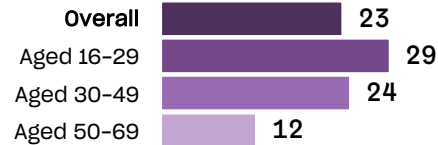


WITH MUSIC STREAMING, ALSO, ABOUT ONE FIFTH OF RESPONDENTS CURRENTLY PAYS ATTENTION TO GENDER DIVERSITY. HIGHER RELEVANCE FOR YOUNGER PEOPLE BELOW THE AGE OF 30.

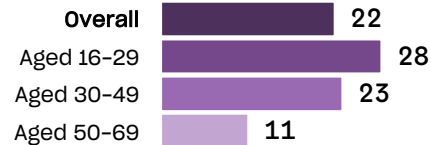
I have a rough idea of the proportion of female and non-binary people in my playlists.



I have already made a deliberate decision to choose a particular music streaming service because it promotes the theme of “gender diversity”.



When I create a playlist I pay attention to the gender of the artists represented in it.



Question: Please think about gender diversity in different music products. Based on your experience, to what extent do you think the following statements apply? Expressed as a percentage; Top2 (completely/somewhat applies)

Source: Consumer survey, basis: users of music streaming (n=1,305 interviews); aged 16-29 (n=450), aged 30-49 (n=561), aged 50-69 (n=294)

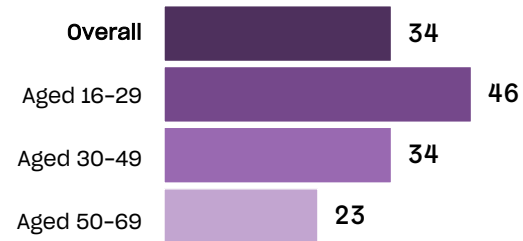
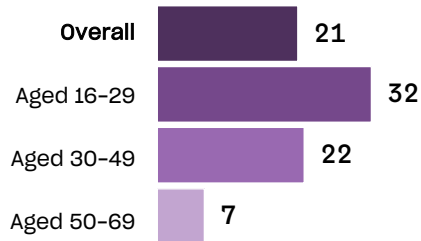
CONCERTS/FESTIVALS

A THIRD OF YOUNGER FESTIVAL GOERS HAVE ALREADY DECIDED AGAINST A FESTIVAL DUE TO A LACK OF DIVERSITY.



I have already actively decided **against attending a music festival** because the line-up **was not gender-balanced**.

A signed **voluntary commitment** to a **gender-balanced line-up** would influence my decision to buy.



Question: Think about gender diversity in various music products. /Given the existing gender-specific inequalities in the world of music, to what extent do you think the following statements apply? Expressed as a percentage; Top2 (completely/somewhat applies)

Source: Consumer survey, basis: concert/festival goers (n=1,092 interviews); aged 16-29 (n=321), aged 30-49 (n=473), aged 50-69 (n=298)

EXPECTATIONS

THERE IS A DESIRE FOR GREATER PUBLIC AWARENESS OF THE ISSUE, ESPECIALLY AMONG YOUNGER MUSIC CONSUMERS.



I would like the theme of "Gender inequalities in the music world" to be the subject of more public debate.



I would like to see the theme of gender equality becoming a more important factor in the decision to buy concert tickets, festival tickets, streaming services, records/CDs etc.



I think there should be quota systems for women and non-binary people at music events, on the radio and on streaming sites to promote gender equality.



Question: Given the existing gender-specific inequalities in the world of music, to what extent do you think the following statements apply? Expressed as a percentage; Top2 (completely/somewhat applies)

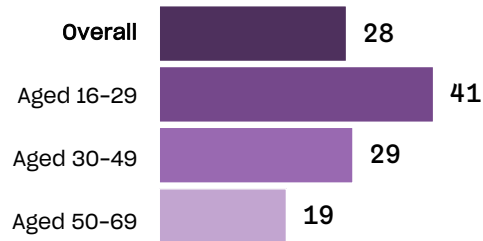
Source: Consumer survey, basis: regular music consumers (at least once a month) (n=1,921 interviews); aged 16-29 (n=487), aged 30-49 (n=787), aged 50-69 (n=647)

INTENTION TO ACT

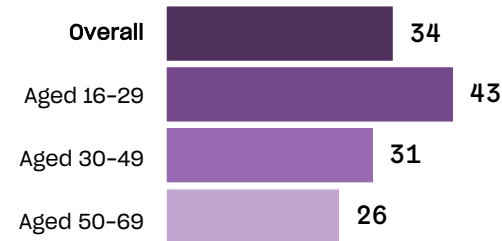


A GREATER DIVERSITY OF MUSIC PRODUCTS FROM RADIO STATIONS AND STREAMING SERVICES WOULD HAVE A RELEVANT IMPACT ON CONSUMERS' DECISIONS TO BUY THESE PRODUCTS.

A signed **voluntary commitment** from a **radio station** to have gender balance in playlists **would have an impact on my decision**.



I would make a **conscious decision** to use streaming services committed to gender balance in playlists.



Question: Given the existing gender-specific inequalities in the world of music, to what extent do you think the following statements apply? Expressed as a percentage; Top2 (completely/somewhat applies)

Source: Consumer survey, basis: users of radio (n=1,808 interviews); aged 16-29 (n=419), aged 30-49 (n=752), aged 50-69 (n=637)/users of streaming (n=1,305 interviews); aged 16-29 (n=450), aged 30-49 (n=561), aged 50-69 (n=294)

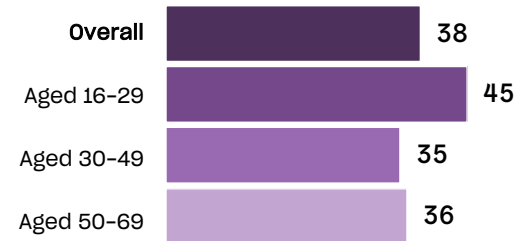
RESPONSIBILITY

THE RESPONSIBILITY FOR GENDER EQUALITY IN MUSIC IS MAINLY CONSIDERED TO LIE WITH THE PROVIDERS AND EVENT ORGANISERS. YOUNG PEOPLE, IN PARTICULAR, INCREASINGLY SEE THEMSELVES AS RESPONSIBLE TOO.



The responsibility for gender balance in programmes **lies with the organisers, streaming services and radio programmes.**

I think that **it is also my own responsibility** to be mindful of gender balance in my use of music.



Question: Given the existing gender-specific inequalities in the world of music, to what extent do you think the following statements apply? Expressed as a percentage; Top2 (completely/somewhat applies)

Source: Consumer survey, basis: users of radio (n=1,808 interviews); aged 16-29 (n=419), aged 30-49 (n=752), aged 50-69 (n=637)/users of streaming (n=1,305 interviews); aged 16-29 (n=450), aged 30-49 (n=561), aged 50-69 (n=294)

CHAPTER 8



→ METHODOLOGICAL
APPENDIX

MUSIC INDUSTRY SURVEY

MEMBERS OF 15 ORGANISATIONS WERE SURVEYED.
THE GVL, DOV AND GEMA WERE MOST STRONGLY REPRESENTED.

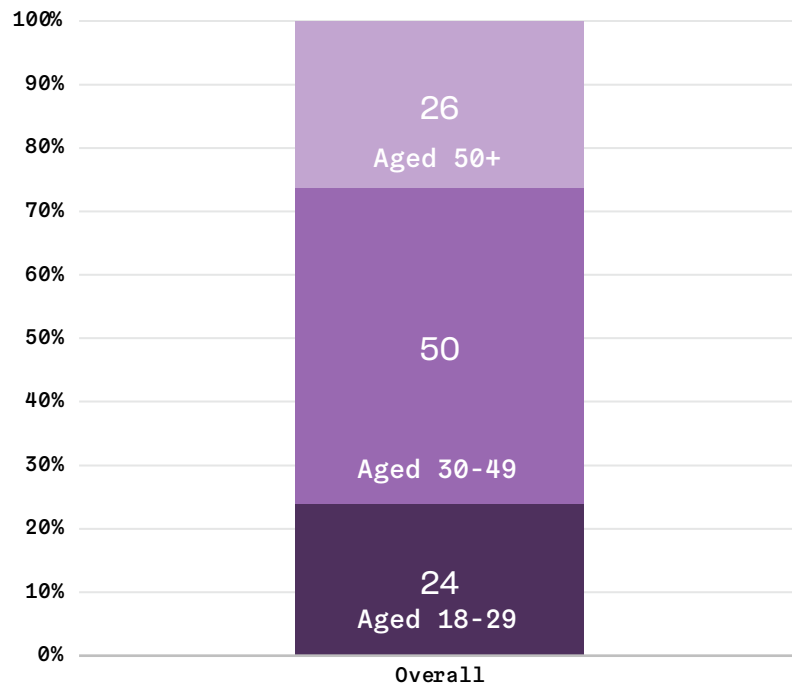
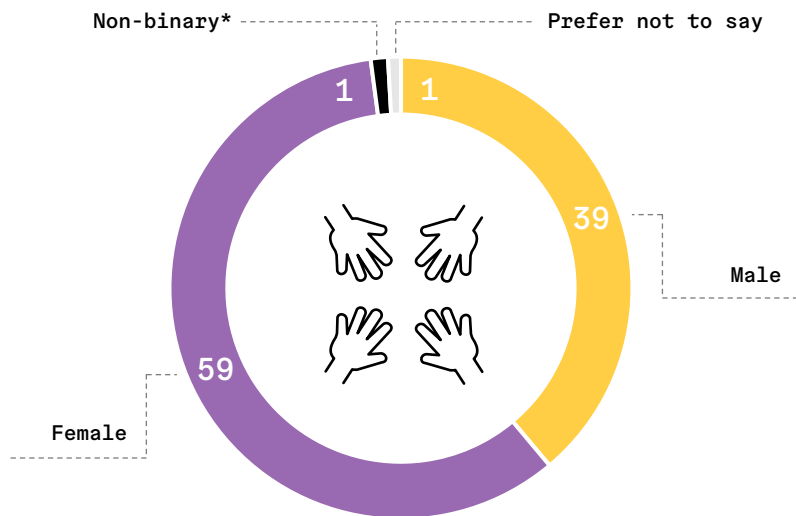


- BVMI Bundesverband Musikindustrie e.V. (n=23) [German Federal Music Industry Association]
- BDKV Bundesverband der Veranstaltungswirtschaft e.V. (n=52) [German Federal Association of Concert Organisers]
- LiveKomm Verband der Musikspielstätten in Deutschland e.V. (n=37) [German Association of Music Venues]
- VUT Verband unabhängiger Musikunternehmer*innen e.V. (n=31) [Association of Independent Music Companies]
- DMV Deutscher Musikverleger-Verband e.V. (n=21) [German Association of Music Publishers]
- SOMM Society of Music Merchants e.V. (n=1)
- EVVC Europäischer Verband der Veranstaltungs-Centren e.V. (n=4) [European Association of Event Centres]
- DOV Deutsche Orchestervereinigung (n=93) [Association of German Orchestras]
- GVL Gesellschaft zur Verwertung von Leistungsschutzrechten mbH (n=115) [German Performance Rights Society]
- GEMA Gesellschaft für musikalische Aufführungs- und mechanische Vervielfältigungsrechte (n=77) [Society for Musical Performing and Mechanical Reproduction Rights]
- BV POP Bundesverband Populärmusik e.V. (n=1) [German Federal Association of Popular Music]
- Music Women Germany e.V. (n=21)
- IMUC Interessenverband Musikmanager & Consultants e.V. (n=3) [Association of Music Managers & Consultants]
- Initiative Musik gGmbH (n=12)
- IHM Interessengemeinschaft Hamburger Musikwirtschaft e.V. (n=25) [Hamburg Music Business Association]

Question: Are you or your company a member of one or more of the following music associations or initiatives?; More than one answer possible
Source: Music industry survey, basis: all respondents (n=334 interviews)

MUSIC INDUSTRY SURVEY

MOST RESPONDENTS ARE FEMALE AND AGED BETWEEN 30-49.

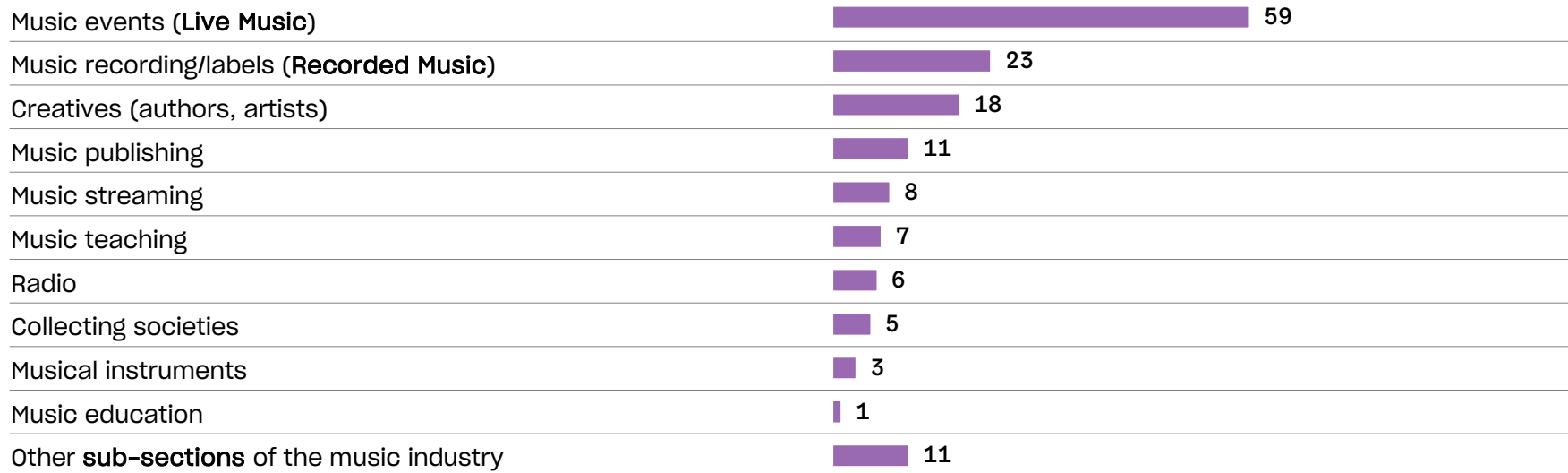


Question: Are you.../How old are you? Expressed as a percentage

Source: Music industry survey, basis: all respondents (n=334 interviews) *Base too small to be shown separately, n=4

MUSIC INDUSTRY SURVEY

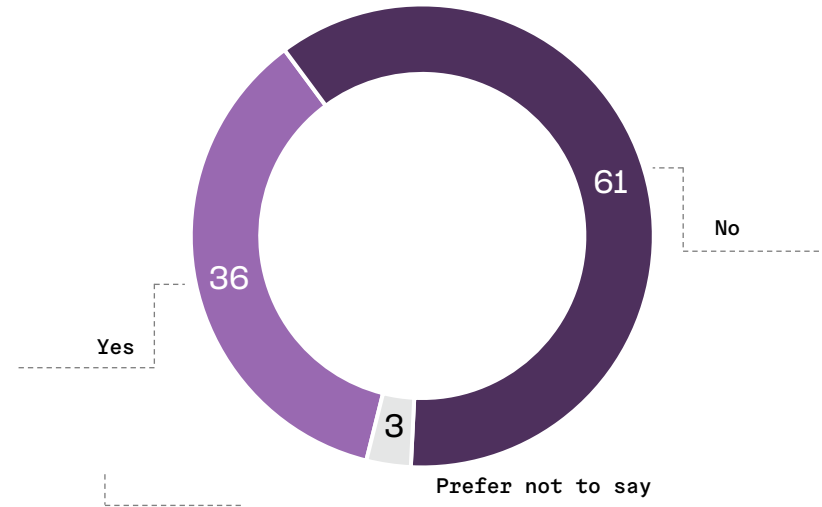
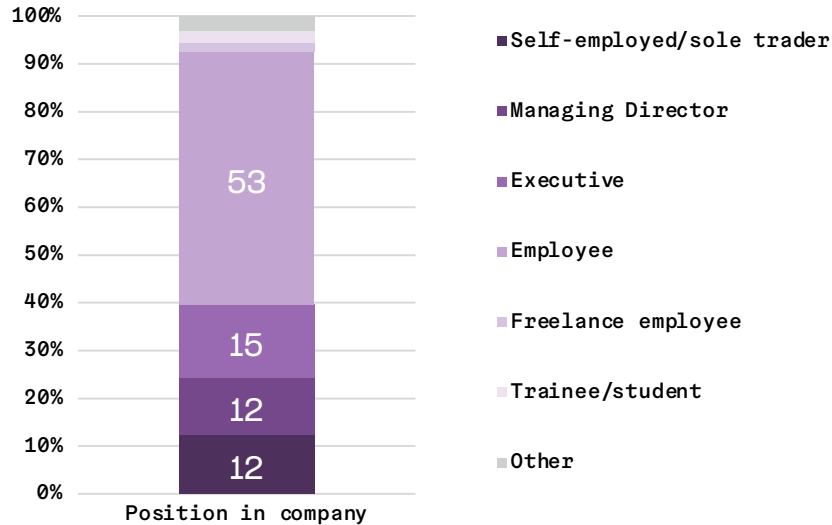
ALMOST SIX IN TEN RESPONDENTS (EXCL. TRAINEES)
WORK IN THE AREA OF MUSIC EVENTS (LIVE MUSIC).



Question: Please indicate which business area your company is involved in or you are primarily involved in as a freelancer; expressed as a percentage
Source: Music industry survey, basis: all respondents (n=334 interviews)

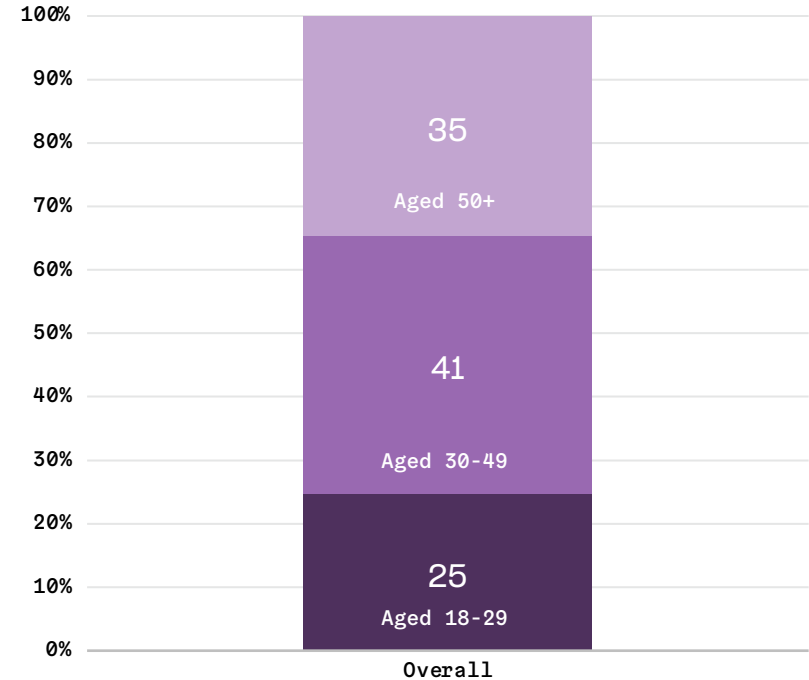
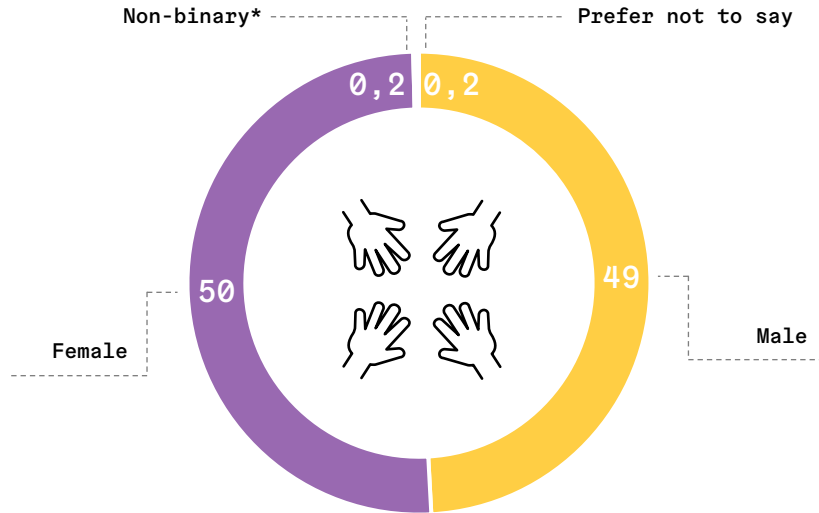
MUSIC INDUSTRY SURVEY

MOST ARE EMPLOYED, AROUND ONE THIRD OF EMPLOYEES IN THE SAMPLE HAVE MANAGEMENT RESPONSIBILITY.



CONSUMER SURVEY

HERE THERE IS A GENDER BALANCE,
MOST OF THE RESPONDENTS ARE AGED BETWEEN 30 AND 49.



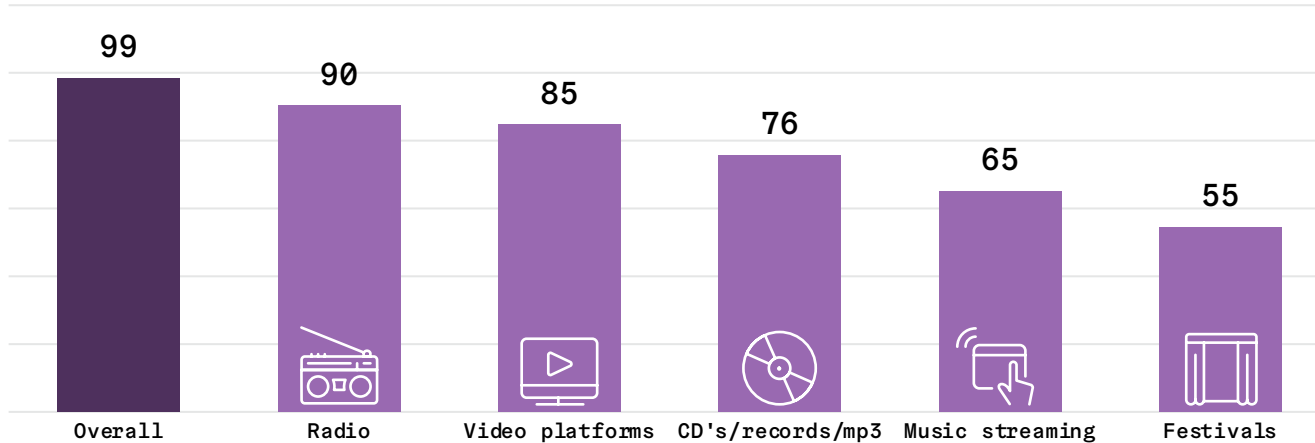
Question: Are you.../How old are you? Expressed as a percentage
Source: Consumer survey, basis: all respondents (n=2,002 interviews) *Base too small to be shown separately, n=4

CONSUMER SURVEY

PRACTICALLY EVERY RESPONDENT CONSUMES MUSIC, MOST OFTEN VIA THE RADIO. MORE THAN HALF GO TO CONCERTS OR FESTIVALS AT LEAST ONCE A YEAR.



Music consumption (at least occasional)



Question: How often do you use the following options for listening to music? And when it comes to going to music events, do you normally go to concerts or festivals at least once a year? Expressed as a percentage
Source: Consumer survey, basis: all (n=2,002 interviews)

THANK YOU



malisa
STIFTUNG

KANTAR

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