

2022 KEYCHANGE STUDY



KANTAR

USER SURVEY ON GENDER EQUALITY REGARDING MUSIC OFFERS

REPORT ON FINDINGS

gefördert von



Die Beauftragte der Bundesregierung
für Kultur und Medien

TABLE OF CONTENTS

01

OBJECTIVE AND METHOD

02

KEY FINDINGS

03

PERCEPTION OF EQUAL
OPPORTUNITIES

04

RELEVANCE TO PURCHASING
DECISION

05

MEASURES TO PROMOTE BALANCED
MUSIC OFFERS

06

OUTLOOK



CHAPTER 1



→ OBJECTIVE
AND METHOD

2022 KEYCHANGE STUDY: OBJECTIVE

In light of existing **gender inequality within the music industry**, the Keychange initiative has set itself the goal of supporting **talented, under-represented genders** by providing training, mentoring and networking support plus conferences and presentation opportunities at partner festivals.

In this context, as a partner of the Keychange initiative, the **Reeperbahn Festival** carried out a national market research study on **user behaviour and the expectations of music consumers** to ascertain perceptions of gender equality regarding musical services in Germany. Based on these findings, this should open up a **dialogue with providers of music services** to initiate updates and changes to music offers and provide **recommendations for action**.



BACKGROUND: THE MUSIC INDUSTRY

THIS STUDY IS PRIMARILY TARGETED AT PROVIDERS OF MUSIC OFFERS.



STUDY PROFILE



Survey of music consumers

Survey to identify music consumers' current perception of gender equality within the music industry and future action plans.

Survey method

Online survey in the
Kantar Online Access Panel

Target group and random sample

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

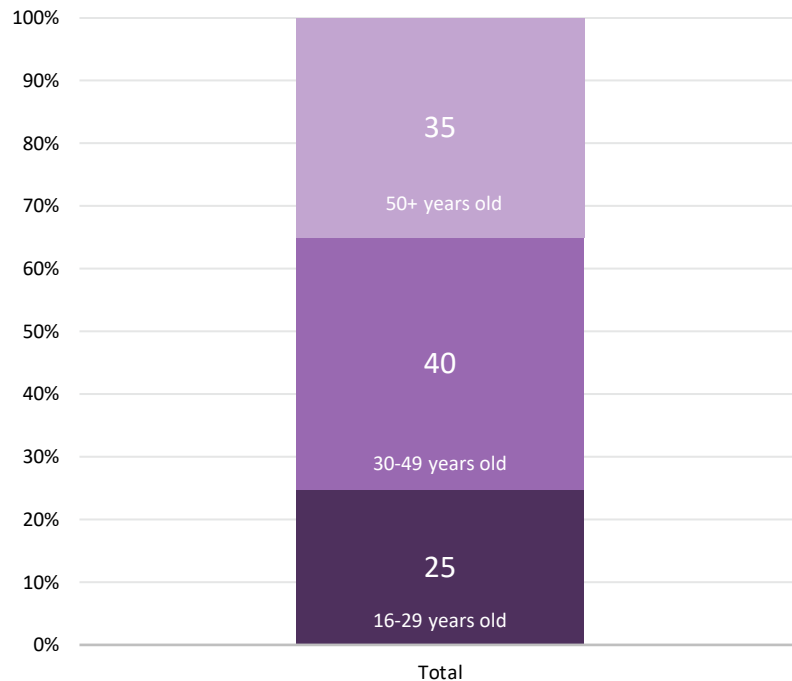
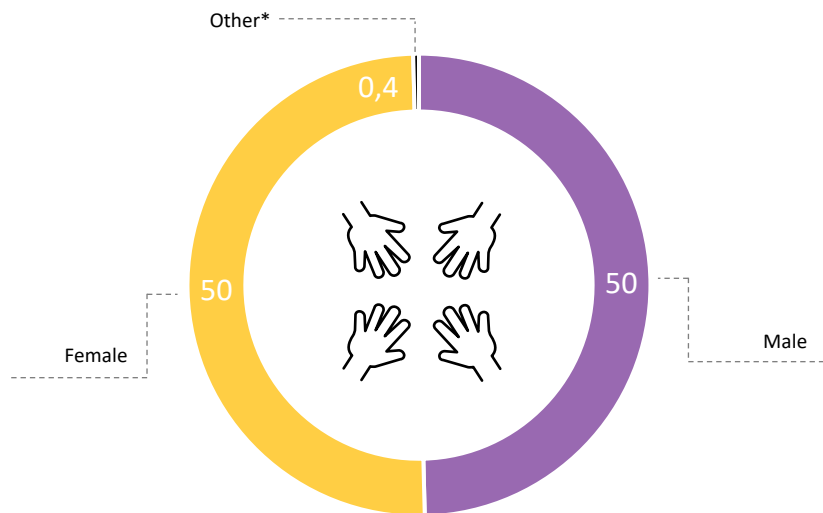
n=2,000 interviews

Survey period

11.04. – 20.04.2022

SOCIAL DEMOGRAPHICS

AN EQUAL GENDER-RATIO WAS SHOWN,
THE MAJORITY OF SURVEY PARTICIPANTS ARE BETWEEN 30 AND 49 YEARS OLD.

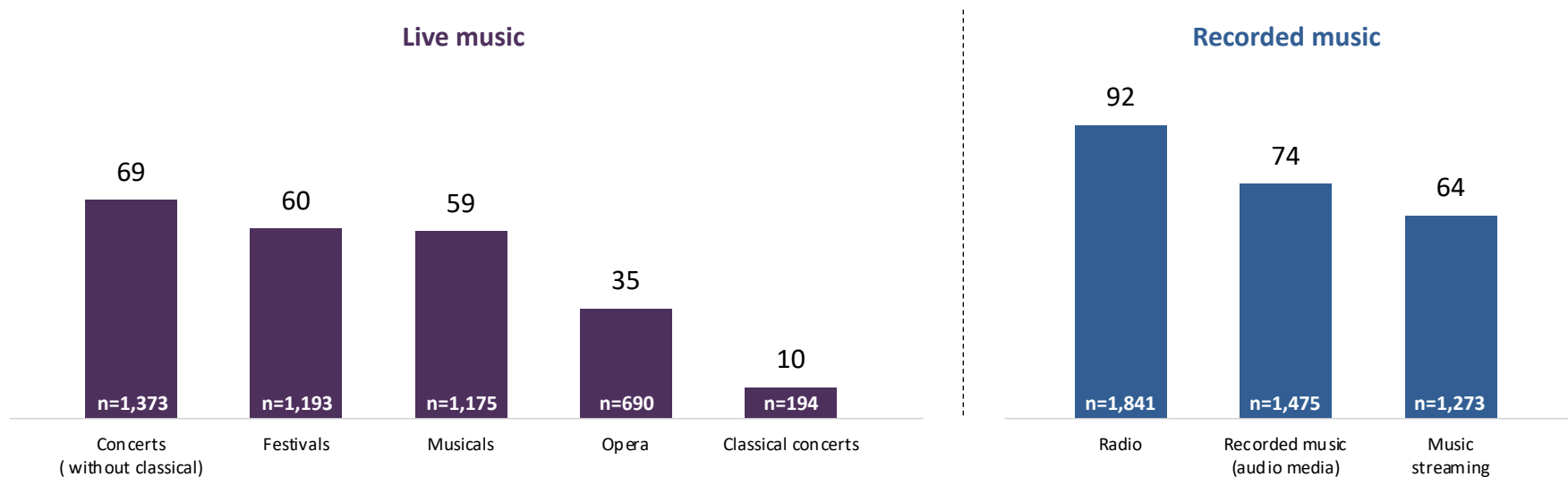


Question: Are you... / How old are you?; Figures in percent
Basis: All survey participants (n=2,000 interviews); *Too small a basis for separate disclosure, n=9

RANDOM SAMPLE PER MUSIC SERVICE

EIGHT MUSIC SERVICES WERE INVESTIGATED IN TOTAL. USERS OF THE RESPECTIVE SERVICES FORM THE BASIS OF THE OBSERVATIONS IN THIS REPORT.

Music consumption (at least occasionally)



PRELIMINARY REMARK

Approach to gender in the survey

During the study, the **integration of additional genders** (in addition to male and female) was deliberately **avoided**. Non-binary artists currently (still) make up a very small proportion of overall musicians. This affects every artist that publicly identifies as non-binary. Many users are unaware of this, and in these cases artists are identified as male or female.

Since no robust claims can be derived based on these findings, the collection of information focusses on **gender equality between male and female artists**.



CHAPTER 2



→ KEY FINDINGS

KEY FINDINGS

AN AWARENESS OF GENDER-EQUAL OFFERS IS PARTICULARLY HIGH AMONG YOUNGER USERS HOWEVER, THERE IS STILL A LACK OF CHOICES.

Gender balance regarding music offers

- An awareness of the equal representation of men and women regarding music offers is still not widespread among music consumers. Only a minority consciously consider whether men and women are equally represented when it comes to music offers.
- This awareness varies significantly based on age: while young music consumers aged 30 and under displayed the highest awareness, older users (> 50 years) rarely perceived an imbalance.
- How gender equality is perceived depends heavily on the music service. It is most clearly recognised in places where the difference can be directly seen by the presence of artists on stage: the lack of women is most frequently noticed at live music festivals and concerts.



Relevance to purchasing decisions

- Gender equality often plays a minor role when making a purchase. Younger users once again currently consider equality when making a decision to purchase music.
- This reservation is reflected in a visibly fewer offers: very few can give specific examples such as festivals with an equal line-up or gender-balanced streaming playlists.
- Music consumers are often therefore unable to select a balanced offer consciously. If this were the case, a significantly larger group of users would choose this as a decision-making criterion than is currently the case.

KEY FINDINGS

PROVIDERS OF MUSIC PRODUCTS ARE OBLIGED TO OFFER A MORE GENDER-BALANCED SELECTION.

Improvement measures

- Young music consumers aged 16-29 are more commonly of the view that they can influence the way music products are offered through their buying behaviour.
- Around half of consumers under 30 believe that gender inequality in the music industry should be publicised more heavily.
- A voluntary agreement could be an adequate way of sensitising users and offering a range of choices. A significant number would consciously opt for a balanced music service if this could be transparently recognised through a voluntary agreement.
- Opinions differ when it comes to positive discrimination: almost the same amount of users are for it as are against it. Acceptance among younger users aged 16-29 is highest. The quota at festivals is considered the most honest representation.

Conclusion

- Providers should set a good example, sensitise more and take suitable measures. Voluntary agreements, targeted marketing and PR work or meeting quotas could work.
- Even if the issue has not yet reached the mainstream, the youngest buyers in particular are becoming increasingly aware of it. It can therefore be expected that the pressure on music service providers will increase. Producers should therefore act now and offer more diverse products so that music listeners can take gender balance into account in their purchasing decisions.



CHAPTER 3

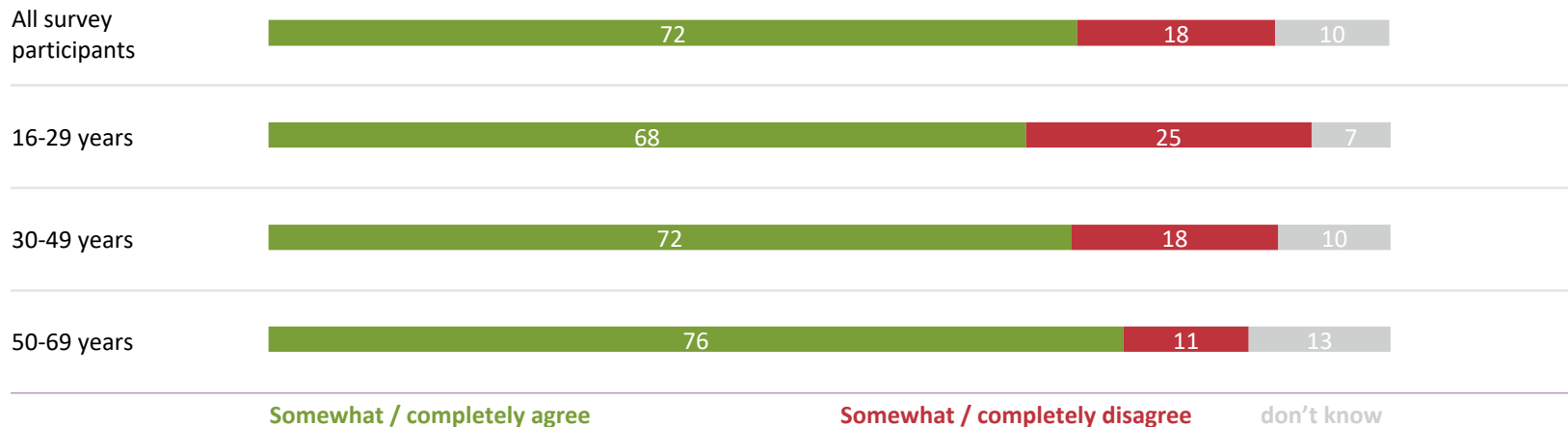


→ PERCEPTION OF EQUAL OPPORTUNITIES
FOR MEN AND WOMEN REGARDING MUSIC
OFFERS

EQUAL OPPORTUNITIES

THE MAJORITY BELIEVE IN GENDER EQUALITY. THE YOUNGER, THE MORE OFTEN THE STATUS QUO IS ASSESSED CRITICALLY.

“Men and women have equal opportunities when it comes to music offers.”

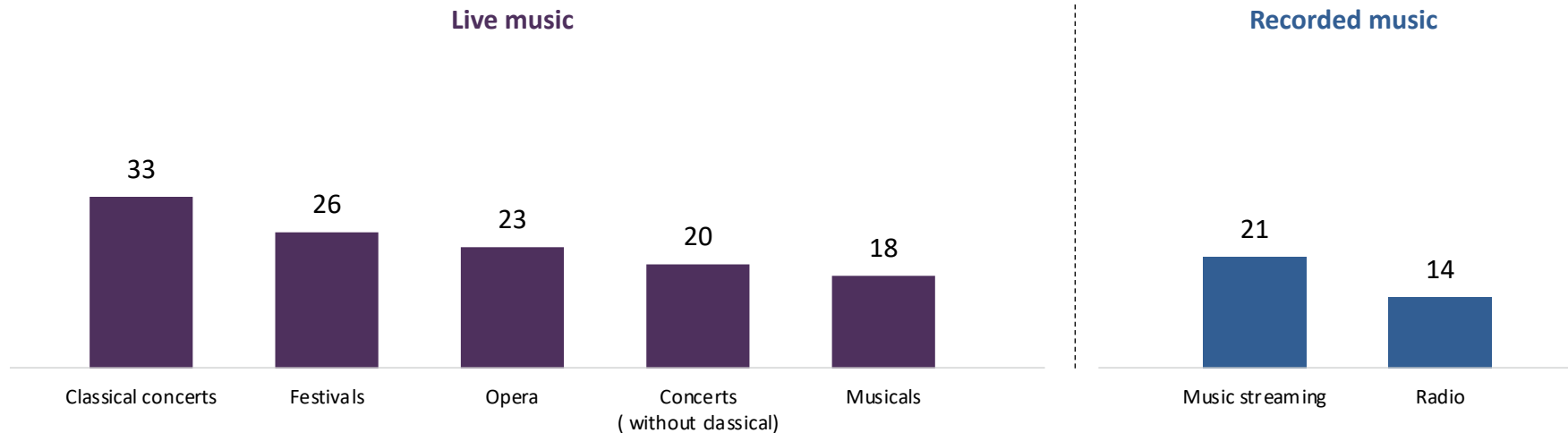


Question: Please think about gender equality regarding music offers. To what extent do you agree with the following statements?; Figures in percent
Basis: Music consumers (at least rarely) (n=1,983 interviews), 16-29 years (n=495, 30-49 years (n=791), 50-69 years (n=697)

REFLECTION

ONE IN THREE HAVE ALREADY THOUGHT ABOUT GENDER EQUALITY AT TRADITIONAL CONCERTS. LOWEST REFLECTION FOR RADIO.

Equality between men and women regarding music offers - “Yes, I have previously thought about it”



Question: At...have you ever thought about whether men and women are equally represented?; Figures in percent

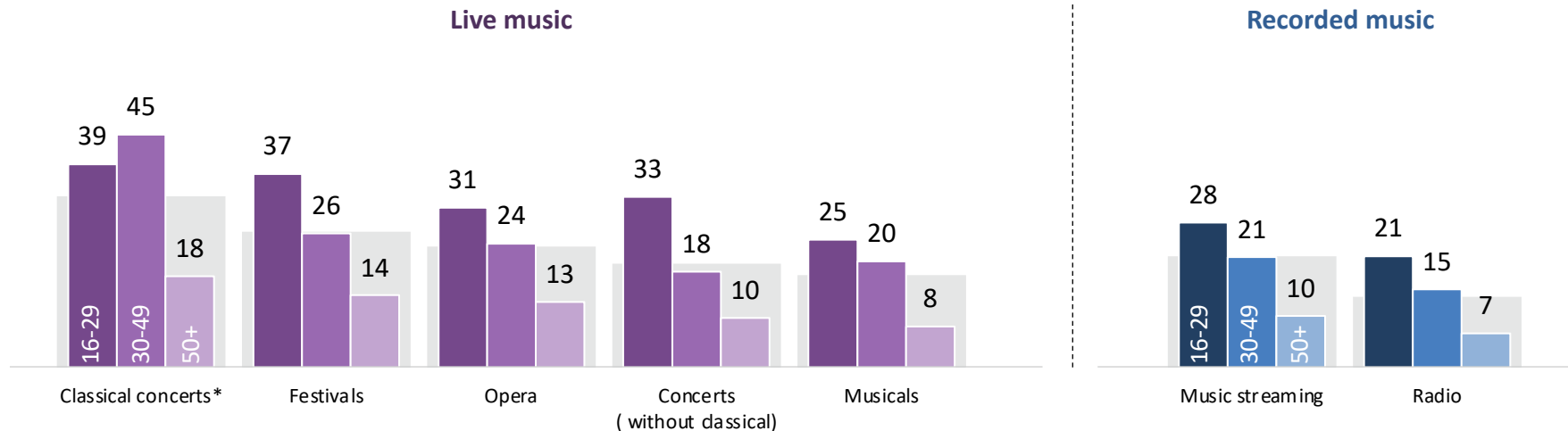
Question not asked for recorded music

Basis: Survey participants who at least occasionally consume the respective music service or attend live music events (n=194-1,841 interviews)

REFLECTION BASED ON AGE

IN GENERAL, THE FOLLOWING APPLIES: THE YOUNGER THEY ARE THE MORE MUSIC CONSUMERS REFLECT ON THE TOPIC OF GENDER EQUALITY.

Equality between men and women regarding music offers - “Yes, I have previously thought about it”



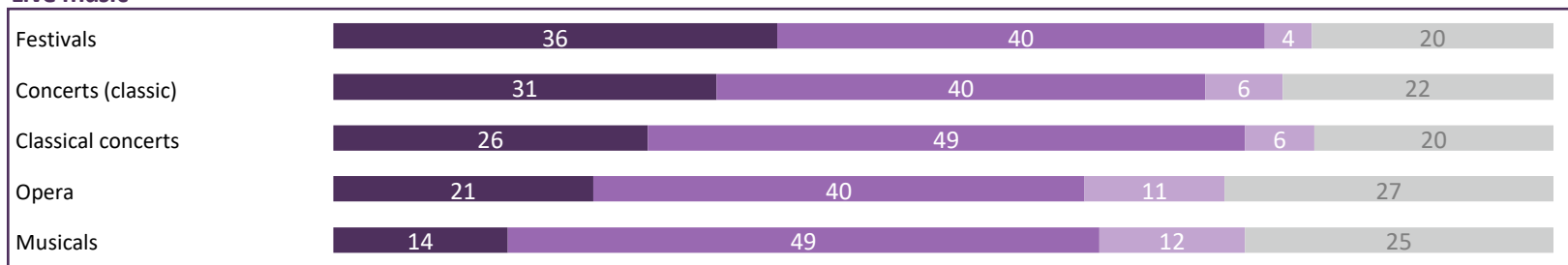
Question: At...have you ever thought about whether men and women are equally represented?; Figures in percent; *Attention: n<80;
Question not asked for recorded music
Basis: Survey participants who at least occasionally consume the respective music service or attend live music events (n=194-1,841 interviews)

REPRESENTATION

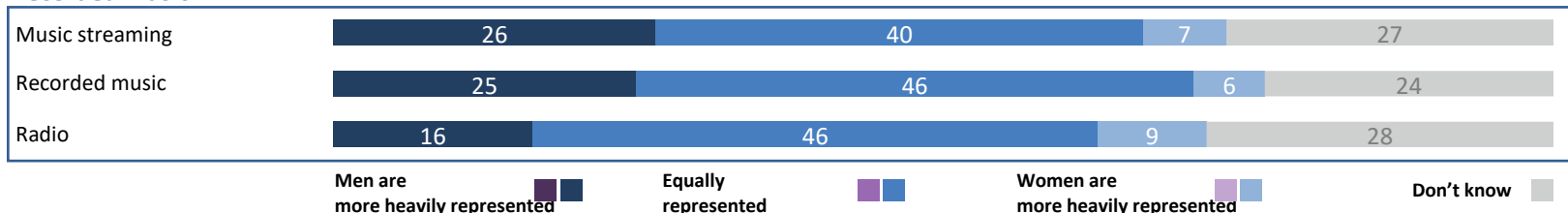
RELATIVELY SPEAKING, A STRONGER PRESENCE OF MEN IS NOTICED AT LIVE EVENTS SUCH AS FESTIVALS AND CONCERTS.

“Do you get the impression that men and women are equally represented?”

Live music



Recorded music

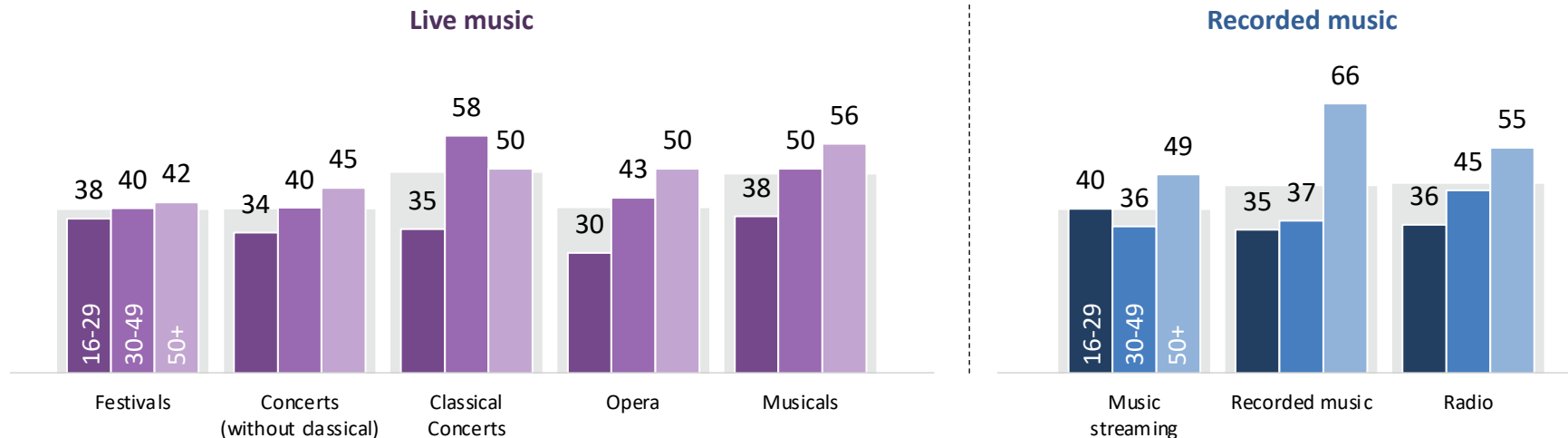


Question: If you think about the that you know or have attended: do you get the impression than men and women ...are equally represented?; Figures in percent; *Recorded music such as CDs, vinyl records or mp3 files
Basis: Survey participants who at least occasionally consume the respective music service or attend live music events / Recorded: Survey participants that buy recorded music online and are inspired by the music titles offered in online stores (n=194-1,841 interviews)

REPRESENTATION BASED ON AGE

OLDER CONSUMERS BELIEVE MORE THAN YOUNGER CONSUMERS THAT MEN AND WOMEN ARE EQUALLY REPRESENTED WHEN IT COMES TO MUSIC OFFERS.

“I get the impression that men and women are equally represented.”



Question: If you think about the that you know or have attended: Do you get the impression that men and women ...are equally represented?; Figures in percent; Attention: n<80 (16-29); *Recorded music such as CDs, vinyl records or mp3 files

Basis: Survey participants who at least occasionally consume the respective music service or attend live music events (n=194-1,841 interviews)

REALITY CHECK

RESEARCHERS AT THE MALISA FOUNDATION AND FEMALE:PRESSURE INITIATIVE SHOW THAT WOMEN ARE STILL UNDERREPRESENTED AT FESTIVALS (LIVE MUSIC).

“Gender in Music” analysis by the MaLisa Foundation*

The “Gender in Music” review focusses on gender distribution between 2010 and 2022 at 15 festival stages (small, medium and large festivals).

The proportion of women at the festival stages reviewed had increased by around 7% in 2010 to a little over 12% in 2019. For 2022, an increase in female representation of 16% shows a positive trend overall.

However, **female musicians are still heavily underrepresented**. At **larger festivals** the proportion of female artists is **less than 10%** on average.

Another finding of the study shows that the proportion of female artists at smaller festivals is still greater than at larger events.

“FACTS survey” by the female:pressure initiative

The FACTS survey published by the female:pressure initiative evaluated the percentage of women at a total of 159 **electronic music** festivals for the current research period of 2020-2021.

The investigation shows that around a third of artists at electronic festivals in Germany during 2020-2021 were female. Compared to the previous review in 2019, this is an increase but women are still heavily underrepresented.

32%

2019: 28%

was the proportion of female artists at electronic festivals in Germany for 2020-2021.



Sources: Gender in Music - Charts, works and festival stages, *MaLisa Foundation in cooperation with GEMA and Music S Women*, September 2022, Period studied: 2010-2019 & 2022; FACTS survey, by the female:pressure Trouble Makers, p. 77, March 2022, 159 festival editions (or 109 festivals) in the ‘electronic’ genre were assessed.

CHAPTER 4

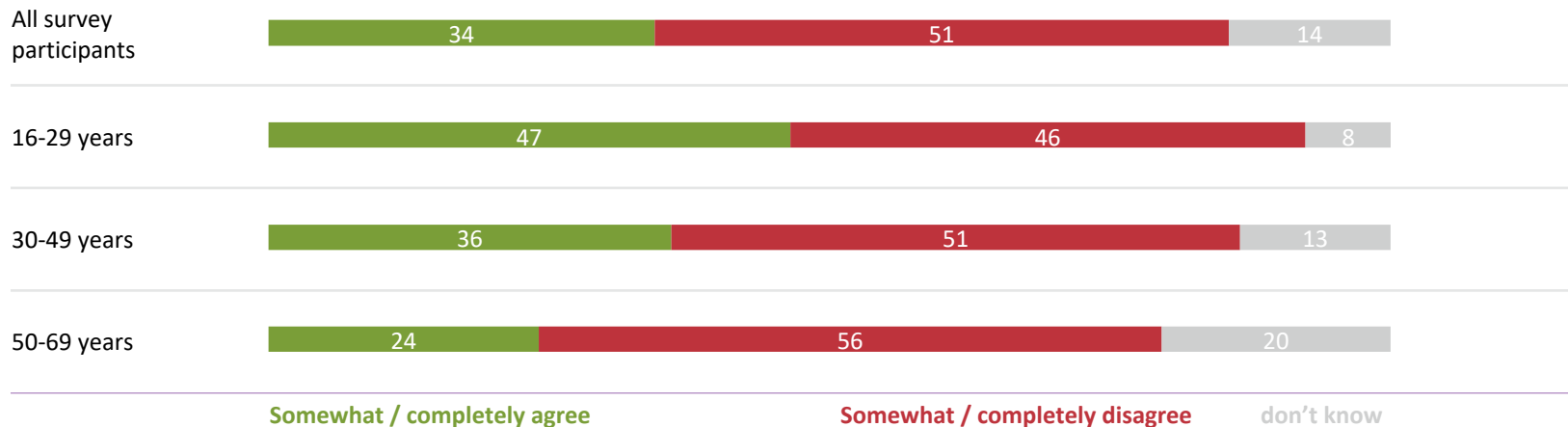


→ RELEVANCE OF GENDER EQUALITY ON
THE DECISION TO PURCHASE

VISIBILITY

AROUND HALF OF CONSUMERS UNDER 30 BELIEVE THAT GENDER INEQUALITY REGARDING MUSIC OFFERS SHOULD BE PUBLICISED MORE HEAVILY.

“I think that the topic of gender inequality in the music industry should be publicised more heavily.”

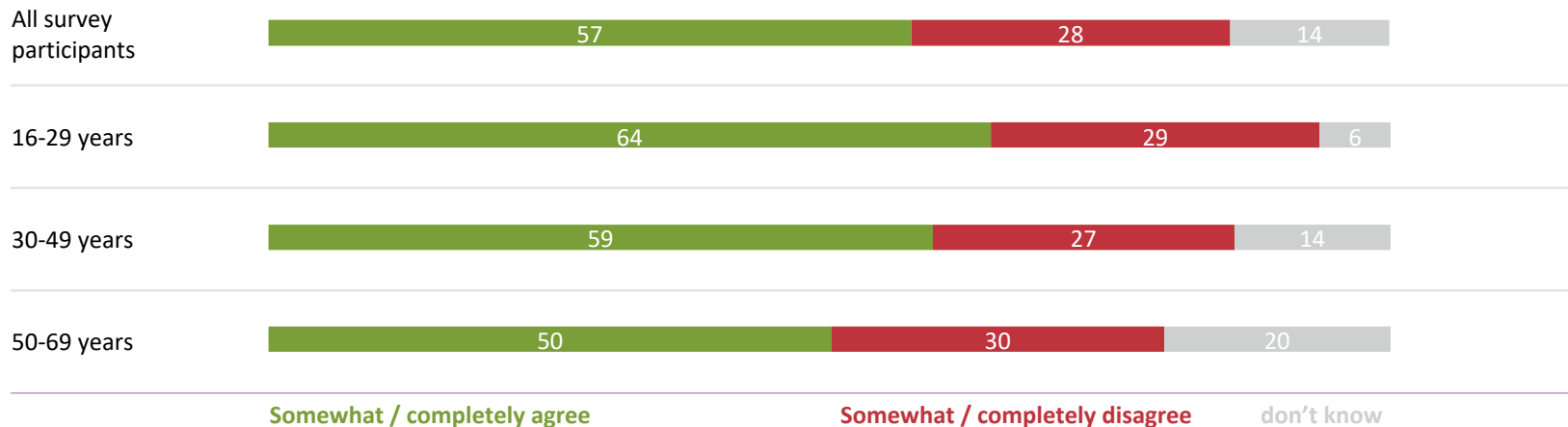


Question: Please think about gender equality regarding music offers. To what extent do you agree with the following statements?; Figures in percent
Basis: Music consumers (at least rarely) (n=1,983 interviews), 16-29 years (n=495, 30-49 years (n=791), 50-69 years (n=697)

INFLUENTIAL OPPORTUNITIES

MUSIC CONSUMERS MOSTLY BELIEVE THAT THEY CAN INFLUENCE MUSIC PRODUCTS THROUGH THEIR BUYING BEHAVIOUR.

“As a music consumer, I believe that I can influence the music products offered through my purchasing decisions.”

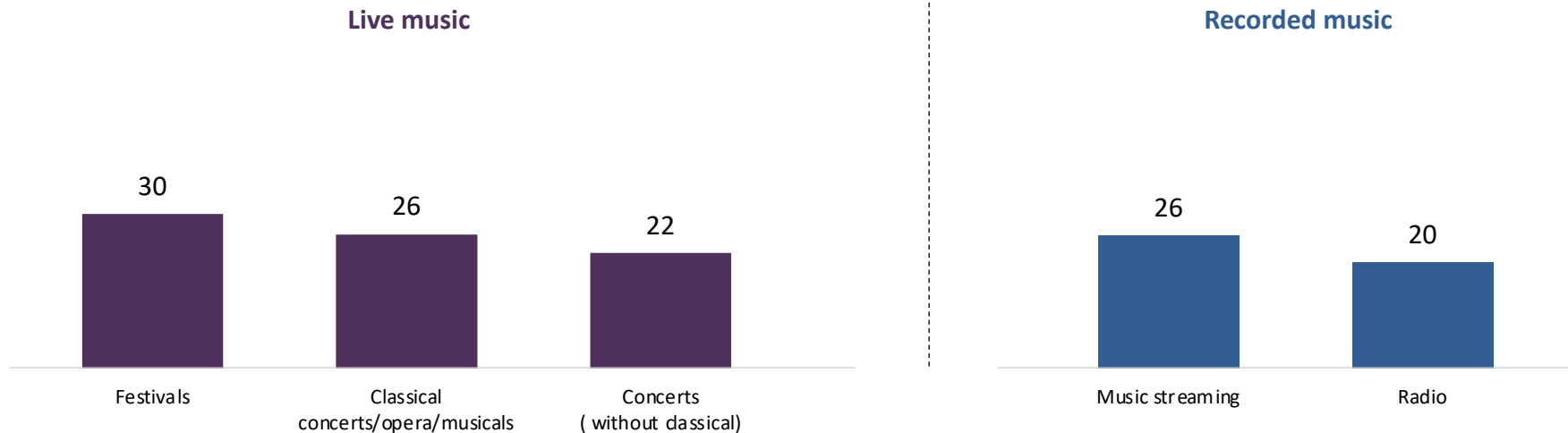


Question: Please think about gender equality regarding music offers. To what extent do you agree with the following statements?; Figures in percent
Basis: Music consumers (at least rarely) (n=1,983 interviews), 16-29 years (n=495), 30-49 years (n=791), 50-69 years (n=697)

RELEVANCE

GENDER EQUALITY CURRENTLY PLAYS A MAJOR ROLE WHEN CHOOSING LIVE MUSIC EVENTS.

Relevance of gender equality on the decision to purchase – Top2 (plays a large/a somewhat large role)

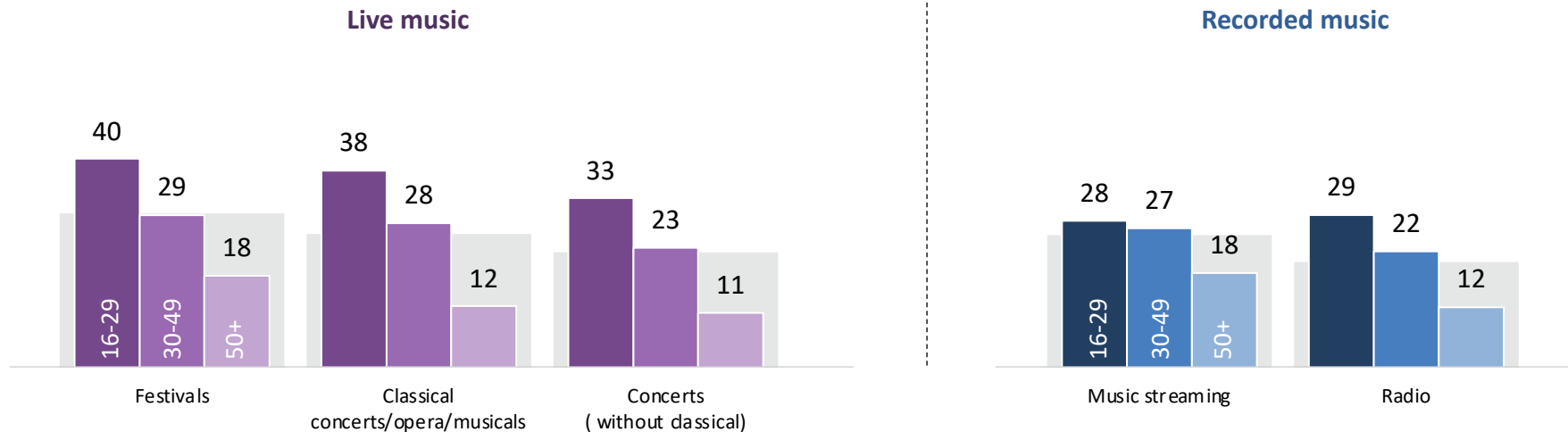


Question: When you choose...: What role does gender equality play in your decision?; Figures in percent; Top2 (plays a large/a somewhat large role); Question not asked for recorded music
Basis: Survey participants who at least occasionally consume the respective music service or attend live music events (n=1,193-1,841 interviews)

RELEVANCE BASED ON AGE

YOUNGER MUSIC CONSUMERS REGULARLY CONSIDER GENDER EQUALITY MORE THAN AVERAGE WHEN PURCHASING MUSIC OFFERS.

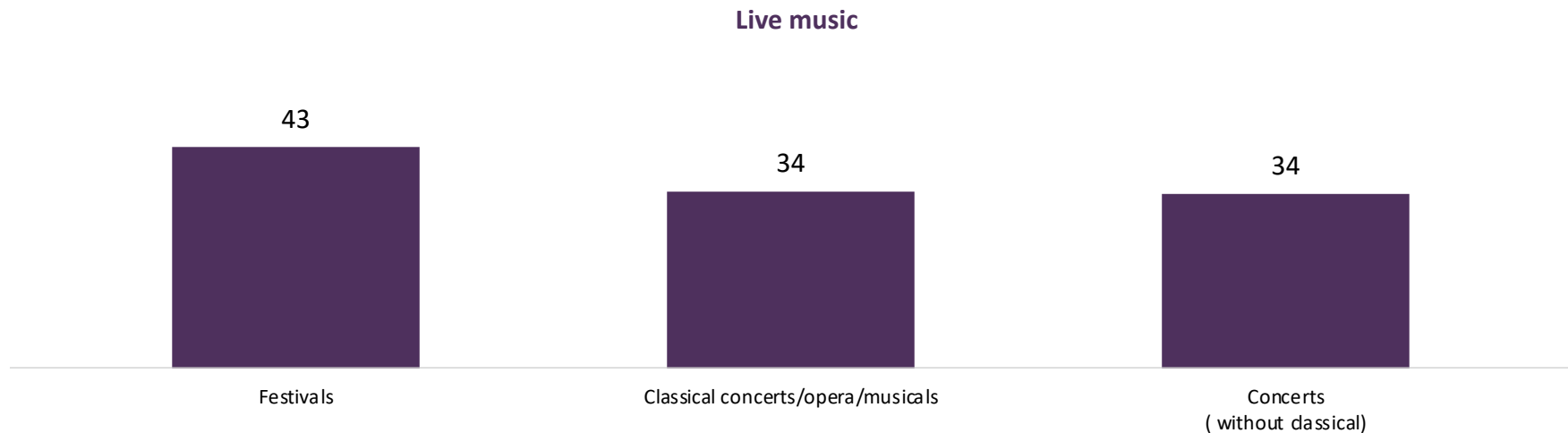
Relevance of gender equality on the decision to purchase – Top2 (plays a large/a somewhat large role)



FUTURE BEHAVIOUR

4 OUT OF 10 FESTIVAL-GOERS WANT A MORE BALANCED LINEUP IN FUTURE.

Future relevance of gender equality on the decision to purchase – Top2 (yes, definitely/yes, possibly)



Question: When choosing...in future, will you focus on gender equality?; Figures in percent; Top2 (yes, definitely/yes, possibly)

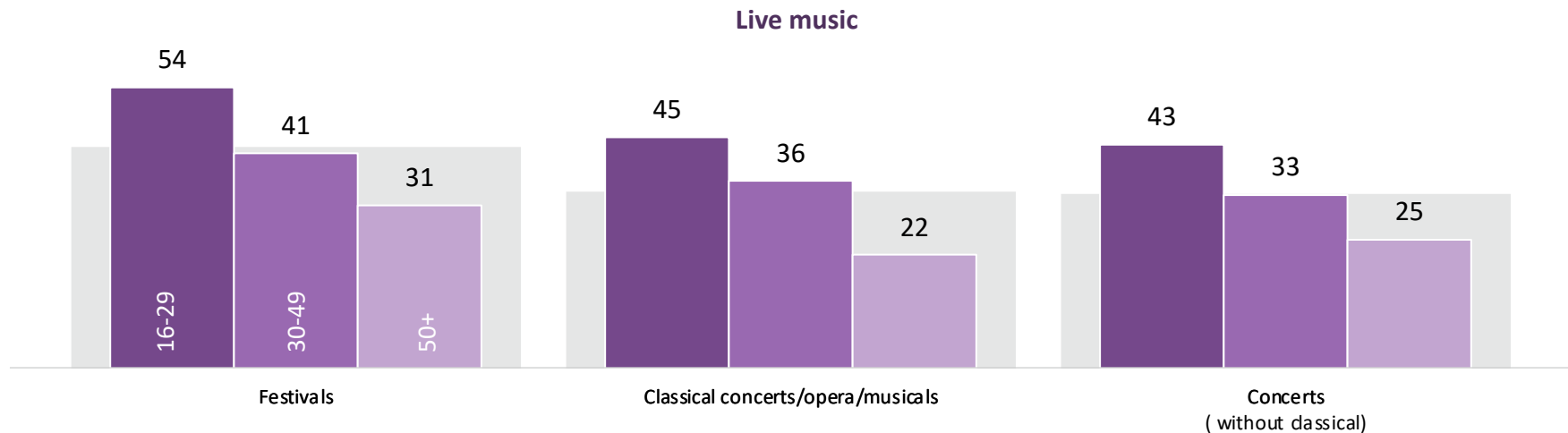
Question not asked for music streaming, recorded music and radio

Basis: Survey participants that at least occasionally attend live music events (n=1.193-1.373 interviews)

FUTURE BEHAVIOUR - AGE

HIGH RELEVANCE AMONG THE YOUNGER GENERATION MORE THAN HALF OF FESTIVAL-GOERS UNDER 30 WANT A MORE BALANCED LINEUP.

Future relevance of gender equality on the decision to purchase – Top2 (yes, definitely/yes, possibly)



Question: When choosing...in future, will you focus on gender equality?; Figures in percent; Top2 (yes, definitely/yes, possibly)

Question not asked for music streaming, recorded music and radio

Basis: Survey participants that at least occasionally attend live music events (n=1.193-1.373 interviews)

CHAPTER 5



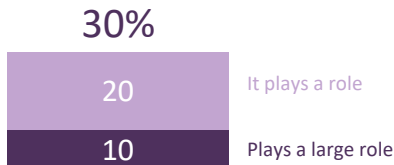
→ MEASURES TO PROMOTE
BALANCED MUSIC OFFERS

BALANCED OFFERS

THE FESTIVAL EXAMPLE SHOWS: MORE CHOICE IS REQUIRED ALONG WITH GREATER SENSITISATION.

Status quo

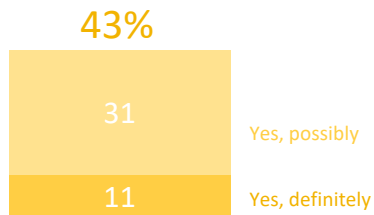
What role does a balanced line-up play on your decision to purchase?



Future behaviour

Will you consider gender equality more when choosing festivals in future?

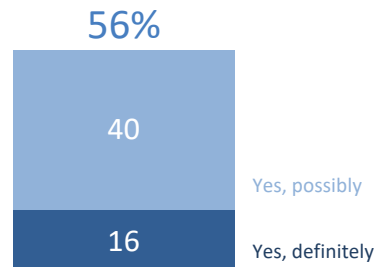
→ Sensitisation



Voluntary agreement

If you had the choice: Would you opt for a festival with a voluntary agreement for a balanced line-up?

→ Enable choice

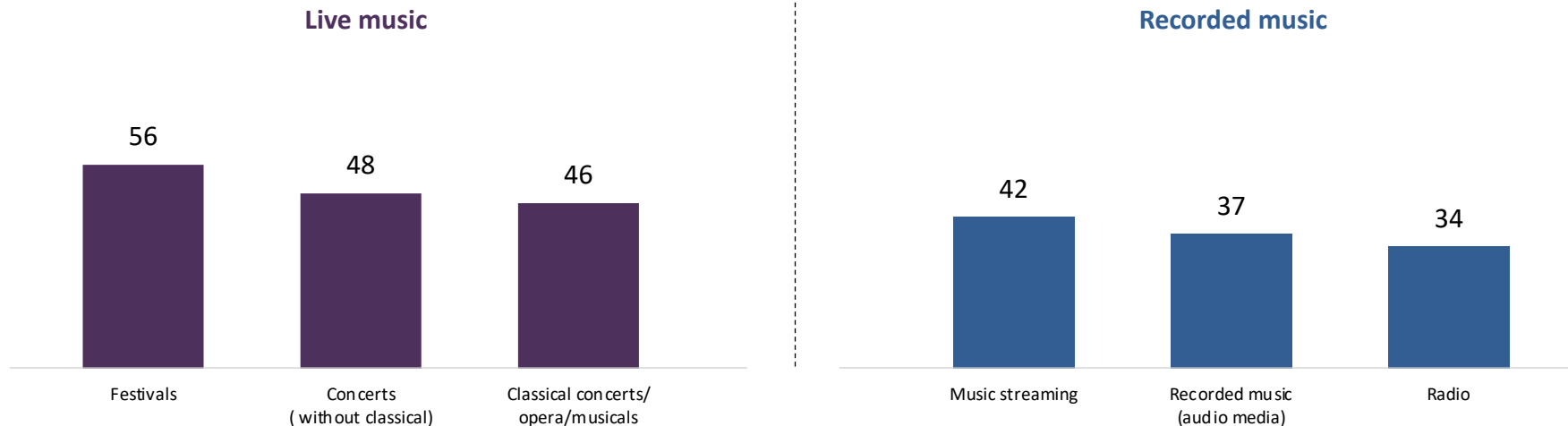


Question: If you decide to attend a festival: What role does a balanced line-up play in your decision? / Will you consider gender equality more when choosing festivals in future? / If you could choose between two festivals, where one had signed a voluntary agreement to offer a balanced line-up and the other one hadn't: Would you then choose the festival with a balanced line-up?; Figures in %
Basis: Survey participants that at least occasionally attended festivals (n=1,193 interviews)

VOLUNTARY AGREEMENT

IF THEY HAD A CHOICE, THE MAJORITY WOULD CHOOSE A FESTIVAL THAT HAD SIGNED A VOLUNTARY AGREEMENT TO ENSURE GENDER EQUALITY.

If you had the choice: Would you choose a service that had committed itself to gender equality? – Top2 (Yes, definitely/yes, possibly)



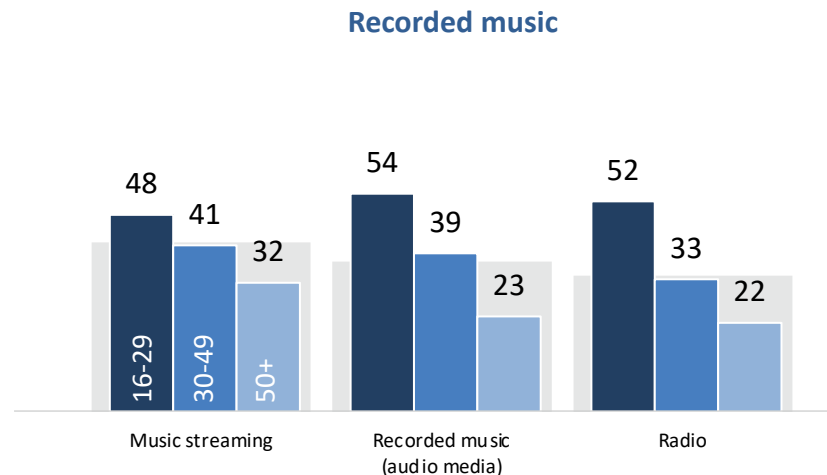
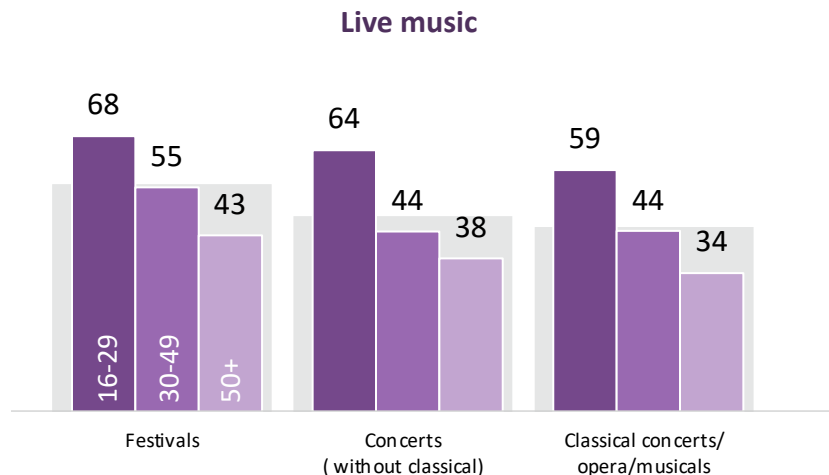
Question: If you could choose between two events/providers/services where one had committed itself to gender equality and the other one hadn't: would you then choose the event/provider/service with a balanced gender ratio? / Recorded music: If sales outlets or platforms were obliged to ensure a balanced gender ratio in their range: do you think that this would be an effective way of promoting gender equality?; Figures in percent; Top2 (yes, definitely/yes, possibly)

Basis: Survey participants who at least occasionally consume the respective music service or attend live music events (n=1,193-1,841 interviews)

VOLUNTARY AGREEMENT BASED ON AGE

FOR AROUND TWO-THIRDS OF 16-29 YEAR-OLDS, A VOLUNTARY AGREEMENT WOULD BE A RELEVANT FACTOR IN THEIR PURCHASING DECISIONS FOR FESTIVALS AND CONCERTS.

If you had the choice: Would you choose a service that had committed itself to gender equality? – Top2 (Yes, definitely/yes, possibly)



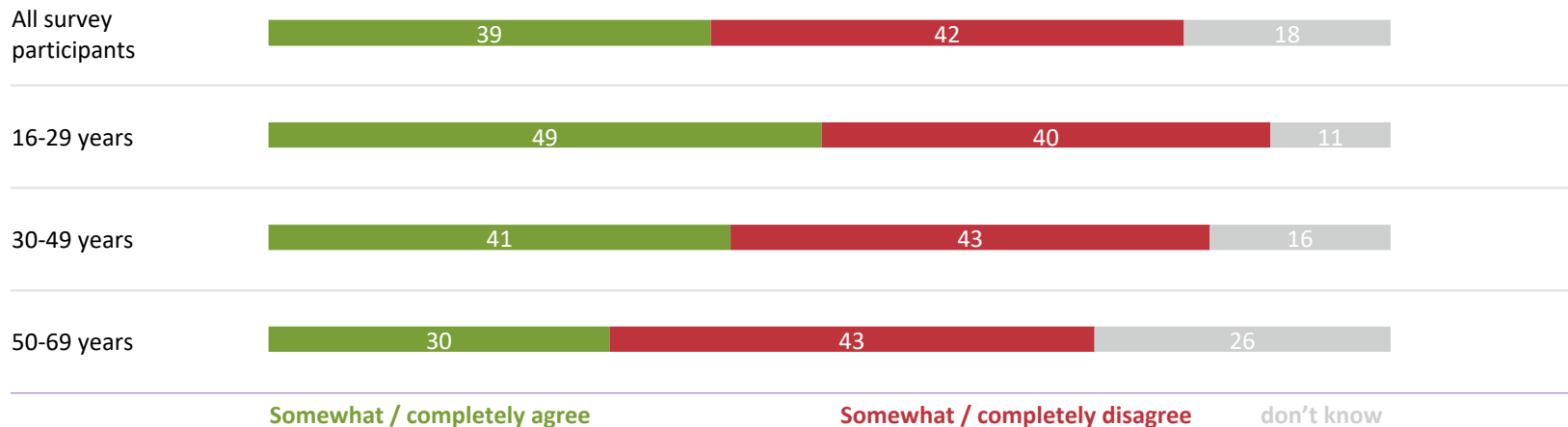
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Basis: Survey participants who at least occasionally consume the respective music service or attend live music events (n=1,193-1,841 interviews)

QUOTAS

WHEN IT COMES TO QUOTAS, OPINIONS DIFFER AS TO WHETHER THIS IS A USEFUL MEASURE FOR ENSURING GENDER EQUALITY.

“Quotas are a good way of ensuring gender equality in music offers.”

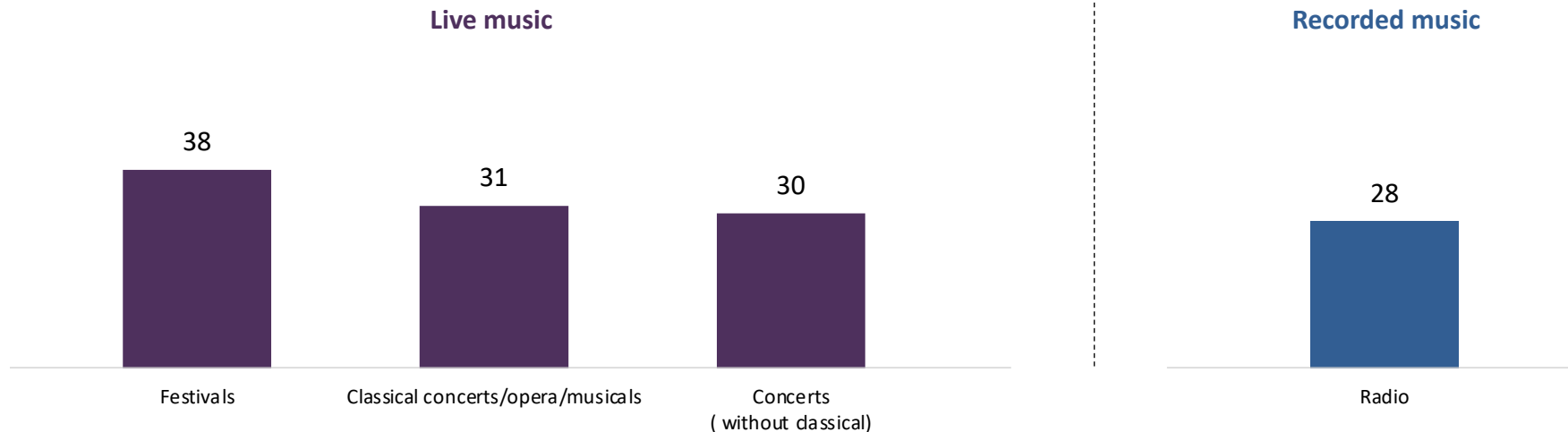


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Basis: Music consumers (at least rarely) (n=1,983 interviews), 16-29 years (n=495), 30-49 years (n=791), 50-69 years (n=697)

ASSESSMENT OF QUOTAS

EVEN AMONG INDIVIDUAL MUSIC SERVICES, ONLY A MINORITY SUPPORT QUOTA SYSTEMS.

Assessment of the benefit of a quota system for women – Top2
(very/somewhat beneficial)



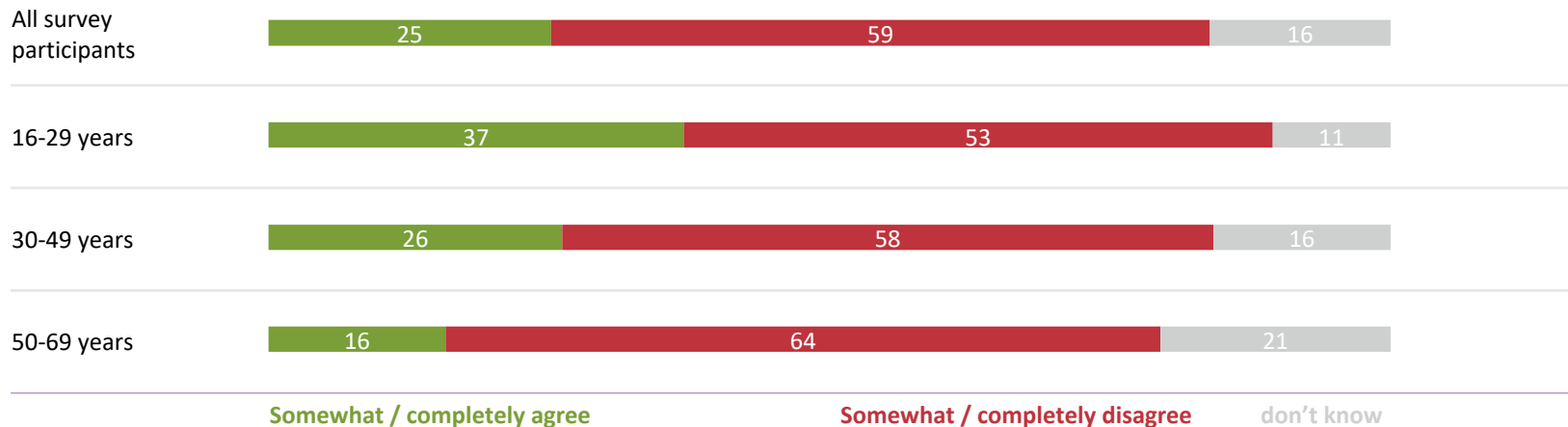
Question: How beneficial do you think introducing quota systems for women at ... would be at promoting gender equality?; Figures in percent; Top2 (very/somewhat beneficial); Question not asked for recorded music and music streaming

Basis: Survey participants who at least occasionally consume the respective music service or attend live music events (n=1,193-1,841 interviews)

FEMALE FESTIVALS/CONCERTS

REGARDLESS OF AGE, FEWER PEOPLE ARE IN FAVOUR OF EVENTS WITH FEMALE-ONLY ARTISTS.

“There should be more festivals or concerts that only represent women.”

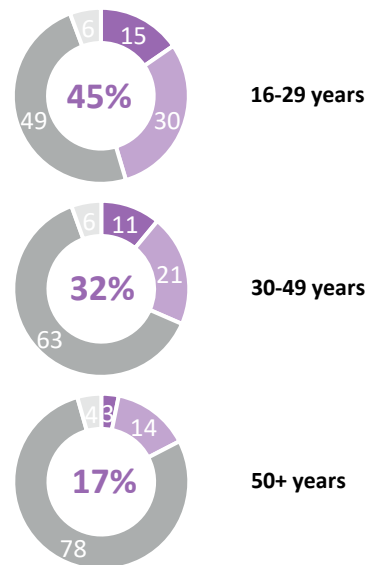
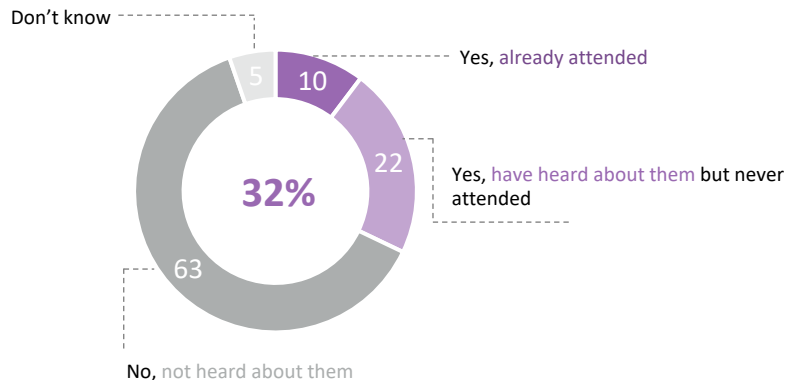


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Basis: Music consumers (at least rarely) (n=1,983 interviews), 16-29 years (n=495, 30-49 years (n=791), 50-69 years (n=697)

FESTIVAL BALANCE

ALTHOUGH THERE ARE ALREADY SEVERAL FESTIVALS THAT ARE COMMITTED TO GENDER EQUALITY, THEY ARE NOT WIDELY KNOWN.

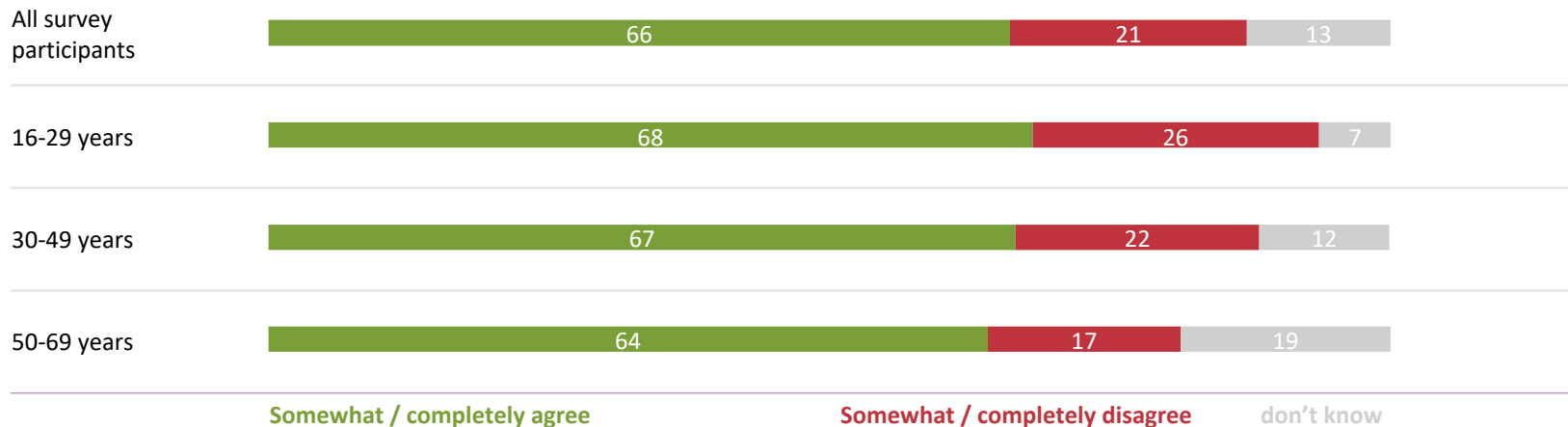
Festivals with a balanced line-up



INFLUENCE OF MUSIC OFFERS

THE RELEVANCE OF MUSIC OFFERS ON THE LISTENING HABITS OF CONSUMERS IS GENERALLY HIGHLY RATED.

“Music offers on the radio or streaming services has a strong influence on the listening habits of music consumers.”

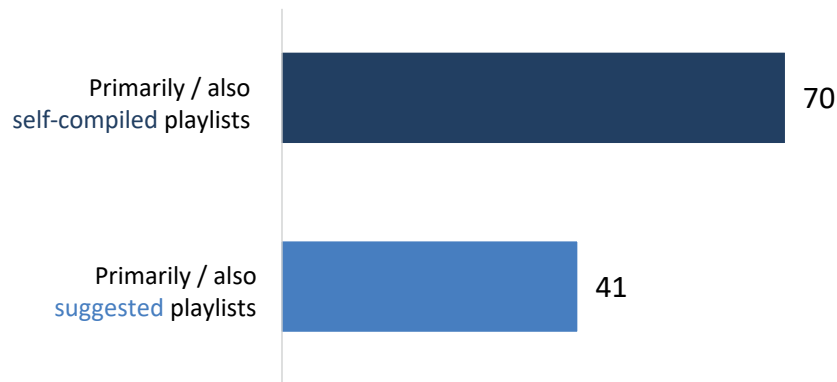


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Basis: Music consumers (at least rarely) (n=1,983 interviews), 16-29 years (n=495), 30-49 years (n=791), 50-69 years (n=697)

STREAMING CONSUMER TYPE

AROUND 4 IN 10 (ALSO) USE PLAYLISTS SUGGESTED BY STREAMING SERVICES. THIS IS ALMOST HALF AMONG THE YOUNGER TARGET GROUP.

“What type of playlists do you primarily listen to from music streaming services?”



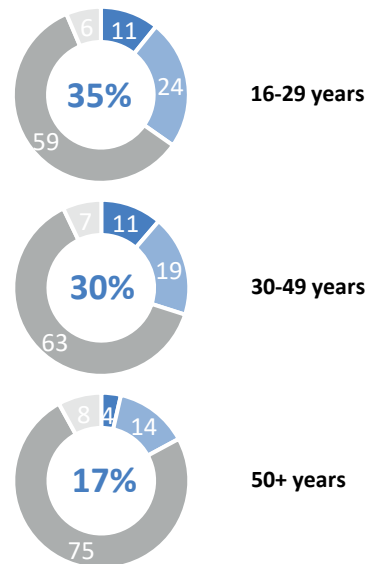
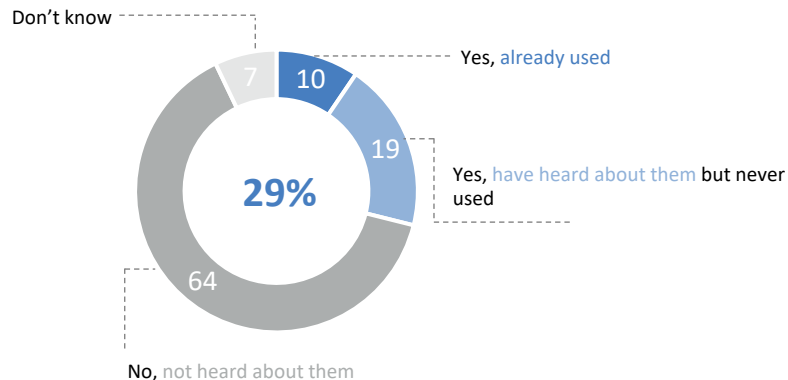
41% of users of music streaming services (also) listen to suggested playlists. This is almost half (48%) among younger users.

Streaming services therefore have an influence on consumers' perception when creating their playlists and can promote gender equality.

BALANCED PLAYLISTS

AROUND 3 IN 10 USERS OF MUSIC STREAMING SERVICES HAD LISTENED TO BALANCED PLAYLISTS AT LEAST ONCE.

Playlists (streaming) with a balanced gender ratio



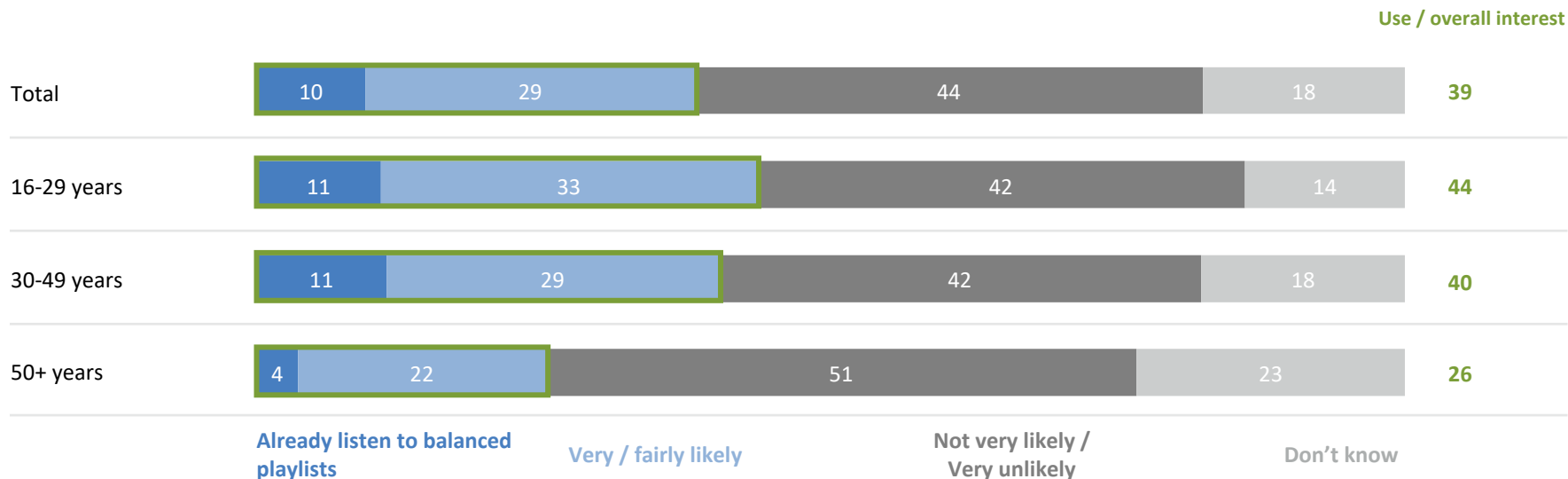
Question: Some music streaming services now offer playlists with a balanced gender ratio. Have you already listened to such playlists?; Figures in percent; Top2 (yes, already used / yes, have heard about them but not yet used)

Basis: Survey participants that use music streaming services at least occasionally (n=1,273 interviews)

POTENTIAL PLAYLISTS

ALMOST 40% WOULD LISTEN TO A GENDER-EQUAL PLAYLIST OR ALREADY DO SO. HIGHEST INTEREST AMONG YOUNG USERS.

“How likely is it that you would listen to gender-equal playlists?”



Question: How likely is it that you would listen to gender-equal playlists?; Figures in percent

Basis: Survey participants that do not yet listen to balanced playlists (n=1,273 interviews), 16-29 years (n=452), 30-49 years (n=547), 50-69 years (n=274)

CHAPTER 6



→ OUTLOOK

KEYCHANGE STUDY: CONCLUSION AND OUTLOOK

Summary

The upcoming, **young generation** of music consumers is already more sensitised to the topic of gender equality and is more likely to consider this when making purchases in future. This indicates that the topic will become more widespread among consumers in the future and **more important for the success** of music products.

At the same time, **there still remains a lack of choice**. Music service providers should therefore focus on **offering more offers with a balanced gender ratio**. In doing so, they will uphold the expectations of younger consumers for diverse content on the one hand. On the other, they will also remain more competitive in the future.

Outlook

The interest in supporting research is high. In order to observe the evolution of consumers' expectations and perceptions of music offers with regard to gender equality, the Reeperbahn Festival, which is a partner of the Keychange initiative, will regularly collect this information and discuss future recommendations with providers.



Image: Marvin Contessi

MANY THANKS



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für Kultur und Medien