

BE THE CHANGE

Women Making Music

MIDiA. tuneCORE **believe**®

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FOREWORD BY IMOGEN HEAP



I'm so chuffed to be up there with such incredible women as an inspiration to fellow female musicians. I was signed at 18 years old but it took me 20 years to realize how much of an unknown force being a woman in this male-dominated industry had pulled against me. It's so ingrained, I couldn't see the wood for the trees. I didn't know any different. That was all I'd ever known.

I was lucky to have been encouraged and helped by so many in my own journey, men and women alike. I hadn't fully appreciated the extra lengths that a few would have gone to, specifically the men, in taking a chance

on a "woman" in the studio or working with me on my many various madcap projects.

We have a long way to go still before there is no more need for reports such as these. There are many incredibly talented people across the industry who come from diverse backgrounds and still remain the minority. It will take us all pulling together – every creator and every institution to show that bias is not acceptable, and that inclusivity and equality needs to form a core part of people's values and beliefs in order to really drive positive change.

ABOUT MIDIA RESEARCH

MIDiA Research is a market intelligence and consulting firm with long-standing expertise in the business of entertainment and digital media. We are the definitive source for cross-entertainment business analysis, providing a deep understanding of trends and innovations shaping the entertainment market and audience behaviours, which help businesses formulate commercially actionable strategy to navigate the evolving digital content and consumption landscape. Our clients leverage our expertise and insight, proprietary multi-country consumer data and market forecasts to help them make smarter decisions faster. For more details visit our website: www.midiaresearch.com.

ABOUT TUNECORE

TuneCore, owned by Believe, is the global platform for independent musicians to build audiences and careers – with technology and services across distribution, publishing administration and a range of promotional services. TuneCore Music Distribution services help artists, labels and managers sell their music through Spotify, Apple Music, Amazon Music, YouTube Music, Deezer, TikTok and more than 150 download and streaming stores worldwide, while retaining 100 percent of their sales revenue and rights

for a low annual flat fee. TuneCore Music Publishing Administration assists songwriters by administering their compositions through licensing, registration, worldwide royalty collections, and placement opportunities in film, TV, commercials, video games and more. The TuneCore Artist Services portal offers a suite of tools and services that enable artists to promote their craft, connect with fans, and get their music heard. TuneCore, part of Believe, is headquartered in Brooklyn, NY, with offices in Los Angeles, Nashville, Atlanta, and Austin, and global operations in the UK, Australia, Japan, Canada, Germany, France, Italy, Russia, India, Brazil as well as the LATAM, Africa and SEA markets. www.tunecore.com.

ABOUT BELIEVE

Believe is a world leading digital music company, helping artists and labels to build their audiences and careers, at all stages of their development, in all local markets around the world with respect, expertise, fairness and transparency. Pioneer in the digital world, Believe has developed an in-house technology and data organization, providing global distribution and digital marketing solutions. With more than 1,500 professionals in 50+ countries, Believe owns several brands, labels and companies including TuneCore, Nuclear Blast, Naïve, Groove Attack and AllPoints. www.believmusic.com.

Key insights

- Gendered expectations have skewed recognition and reward in the music industry: of 401 women creators around the world, 81% think that it is harder for female artists to get recognition than male artists. Linked to this is the fact that there are not as many female role models for independent creators (81% agree, 49% 'agree strongly')
- Almost two-thirds of female creators identified sexual harassment or objectification as a key challenge, making it by far the most widely-cited problem
- Sexualization and objectification are a consequence (or symptom) of unbalanced power dynamics, as shown by the next 'big three challenges': ageism (identified by 38%), lack of access to male-dominated industry resources (36%) and lower pay (27%)
- These major challenges are symptomatic of deeper issues of systemic male dominance permeating industry attitudes and behaviours; over 90% of our respondents said that they had experienced unconscious bias – nearly half of them frequently
- Music composition, production and sound has long been connected primarily with men, so it is no surprise that the majority of female creators (63%) feel excluded from the composition and production, which makes this aspect of music creation highly 'genderized'
- Although the overall representation of women in society has increased over the past few decades, 84% of women still feel that

there exists a perception that women are expected to take on the primary role of parenting duties. The music industry wants female artists to be young – partly a symptom of the industry's youth obsession, but also so that women become successful before they are presumed to decide to take on the role of motherhood

- To bring more female creators into the industry, women want changes to come from within organizations and from leaders across the music industry through diversity, policies and culture, with 42% stating this as one of the 'top three' ways to encourage more women into the industry. Meanwhile, 38% of female creators want to see this organizational change underpinned by legislation
- The most practical starting point is in female-friendly resources and safe workspaces (34%), and 35% of women creators want more change to come from learning and shared experiences, in the form of coaching and mentoring

About the survey

This survey was done in February 2021, with a carefully designed survey distributed on the web, assisted by a variety of music industry associations, networks and influencers working directly on issues faced by women creators. For more details on the survey and the composition of its respondents, see the appendix.

MIDIA

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A BOLD VISION FOR REAL CHANGE

The challenges and barriers facing women in the music industry are becoming more recognised thanks to the work of a growing number of networks and industry groups. However, these challenges and barriers are still there, remaining poorly understood and unsolved. For the first time in the industry, we have collated the views of female creators themselves – 401 of them from around the world: music artists, songwriters, producers and DJs. Many of them are direct artists, starting out on making a career in music with little support from the industry's traditional

infrastructure. Some are self-managed, running their own labels and production companies. Others are signed to labels or establishing themselves as songwriters, navigating their way through a complex, male dominated industry.

In this global MIDiA survey, sponsored by TuneCore/ Believe, we asked this global community of female creators about their goals, challenges, experiences and inspirations. We wanted to build on and add to the excellent work already being done to better understand the uphill

"THE ISSUES, AND CHALLENGES HIGHLIGHTED IN THIS REPORT ARE NOT "WOMEN'S PROBLEMS" TO BE SOLVED JUST BY WOMEN IN THE MUSIC INDUSTRY."

journey they face, and hear from them first-hand about their experiences and perceptions, from direct forms of discrimination through to the endemic issues of under-representation, unconscious bias and damage to confidence.

There is much to be done. Many female creators, when asked what they thought has changed in recent years, agreed that transparency and discourse have improved – but many also hold the view that real, material change remains harder to pin down. Phrases such as "tokenism" and "lip service" are commonly used to describe some of the current changes, but there is also a clear, bold vision of what real change should be. These are issues for the whole industry, from the boardrooms of the biggest labels to the festival organisers choosing line-ups, to the teams

running studios and rehearsal rooms and the programmers and curators on radio and streaming services. Across the board, they must internalize and consider the perspectives and contributions of diverse and often under-represented groups, and convert this into full and fair representation for women creators, from the inside out.

The issues, challenges and experiences highlighted in this report are not "women's problems" to be solved just by women in the music industry. The findings of this study articulate a systemic inequity in the music industry today, requiring thoughtful consideration, commitment to change and courageous action. This is required not of any one faction of the industry, or by women alone, but by all the industry's organizations and constituents.

"PHRASES SUCH AS "TOKENISM" AND "LIP SERVICE" ARE COMMONLY USED TO DESCRIBE SOME OF THE CURRENT CHANGES IN THE INDUSTRY."



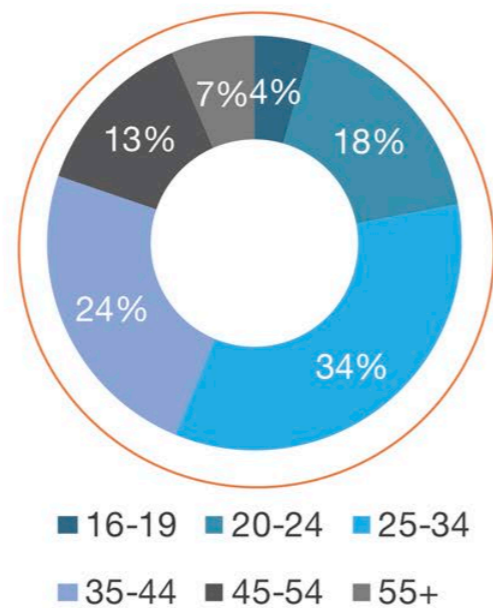
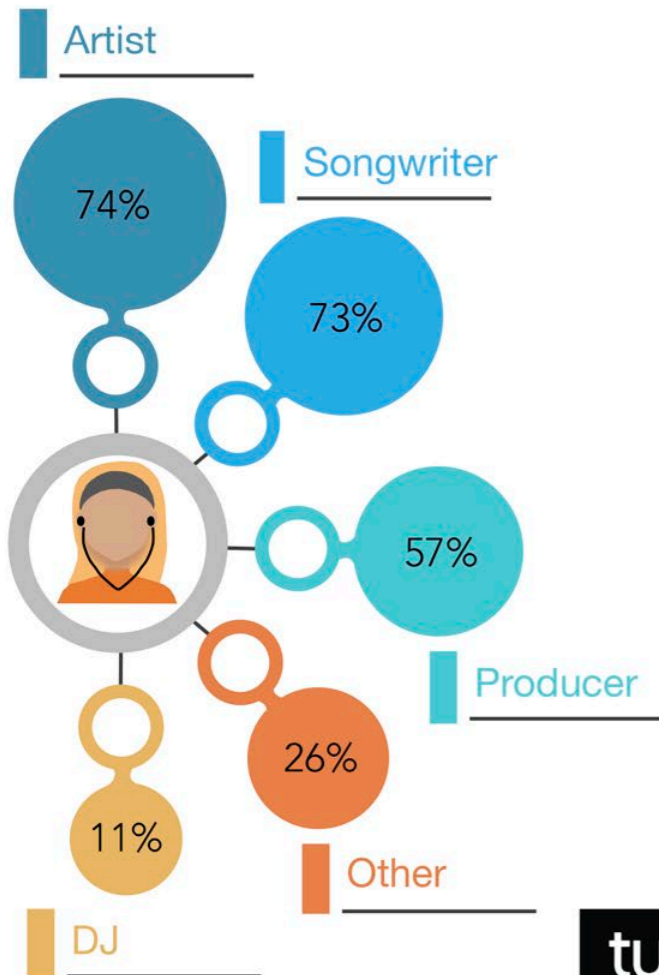
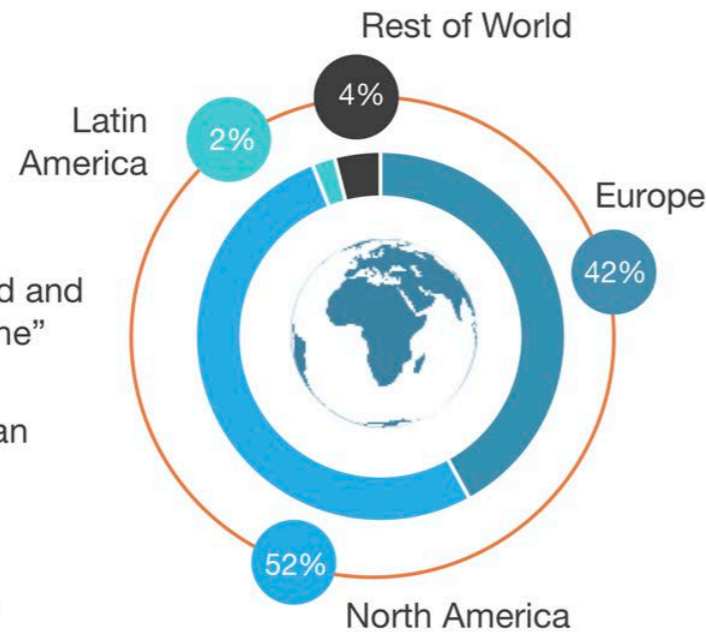


MIDIA / TUNECORE MUSIC CREATOR SURVEY

67% “To become respected and recognized in my scene”

52% “To build up a loyal fan base”

52% “To make music and have people enjoy it”



42% “I release music independently, without any label relationship”



WOMEN CREATORS NOW – A SITUATION ANALYSIS

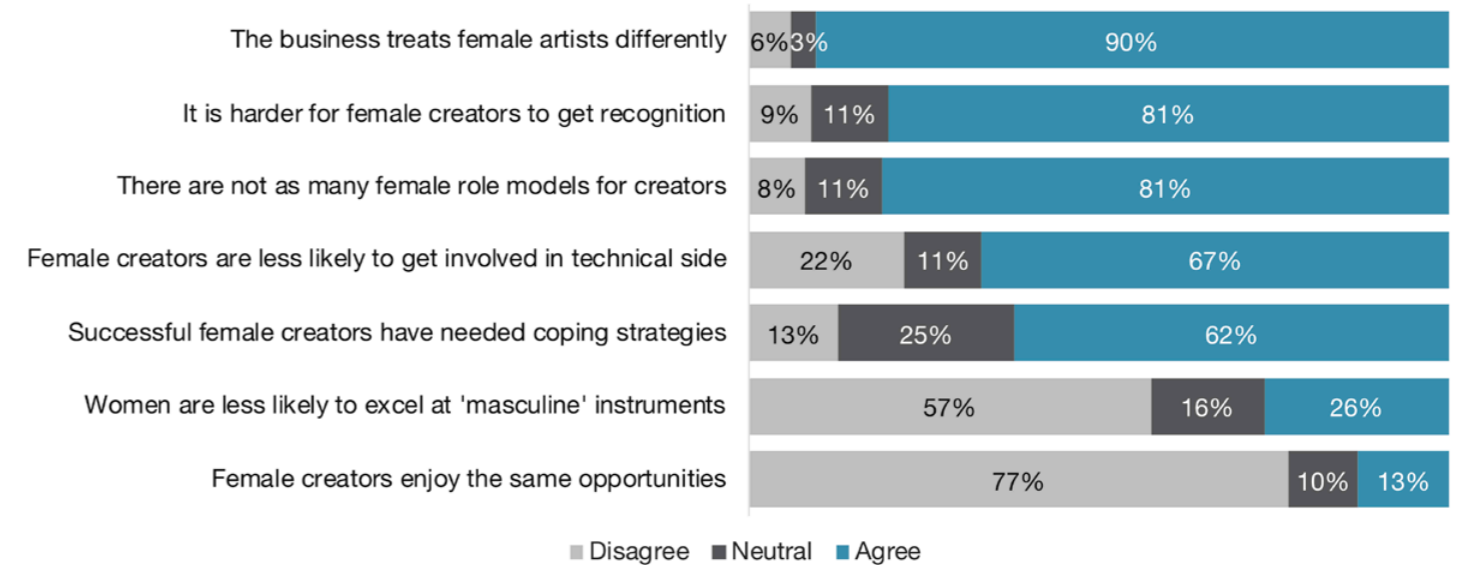
A career in music is not an easy option for any creator. But when it comes to female artists, songwriters and producers, the usual challenges of navigating a complex, unpredictable industry are

multiplied many times over. Our survey revealed that no woman (working in any creative field) has managed to avoid some form of discrimination, bias, exclusion or being “treated differently”.

THE BIG CHALLENGES

Figure 1: The role of women music creators in the industry

Question asks: “Thinking about the role of women creators in music, please indicate how much you agree or disagree with the following statements.”



Source: MIDIA Research/TuneCore - Women Creators Survey 02/21, n = 401



Nine out of ten women creatives agree that the music business treats female artists differently from male artists. This critical dynamic of “difference” underpins many behaviors and relationships within the music industry, feeding

the roots of inequity. Some 80% agree that it is harder for female artists to get recognition than male artists, reflecting that traditionally gendered expectations have skewed recognition (and also reward) for musical ability.

This is linked to the fact that there are not as many female role models for independent creators as there are male (81% agree, 49% 'agree strongly'). As a result, female creators do not enjoy the same opportunities as their male counterparts – only 13% of respondents believed that women are afforded the same opportunities. Thus exists a spiral of perceived difference leading to lack of recognition, leading to lack of opportunity – spinning like a stuck record, one with serious

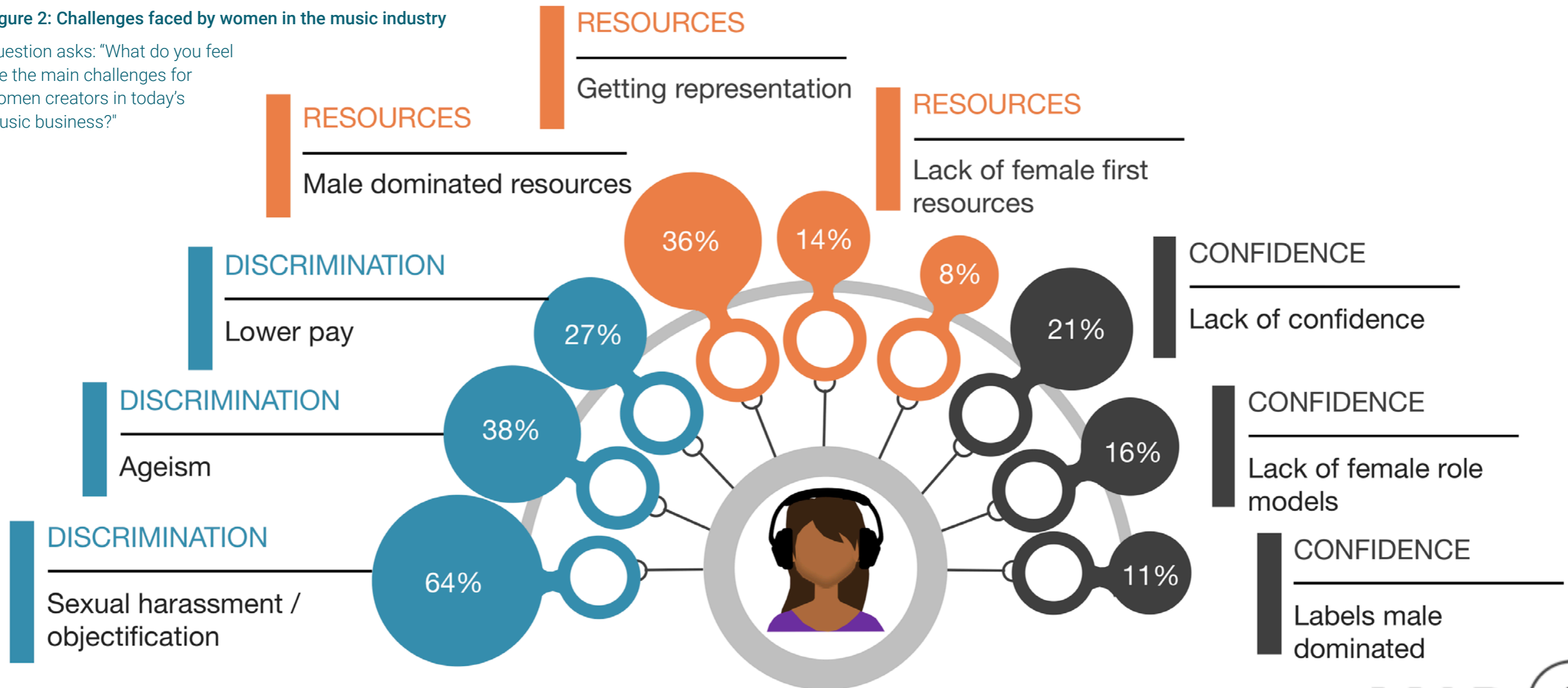
consequences for the industry: a lack of role models and representation for female creators. This comes full circle, reinforcing the perception of difference, which is the underlying issue for women, both new to and established, within the music industry. To put things into even sharper perspective, we asked women creators what they consider to be the greatest challenges - the top three above all else. The responses bring some clarity and (we hope) help the music industry to

get its priorities right when it comes to facilitating a better environment for female artists. The main challenges can be summed up within three key areas as shown below: Discrimination, Resources and Confidence. Almost two-thirds of female creators identified sexual harassment or objectification as a key challenge, making it by far the most widely-cited problem. When questioned about their own experiences, eight out of ten women said they had experienced sexual

harassment during their careers, and over one quarter said they experienced it frequently. With sexual harassment so prevalent, female creators expect and anticipate this behavior in their places of work, meaning that while women's safety is a broader issue in general, it is poignantly relevant to the music industry. In short, the majority of women making music face inappropriate and discriminatory behaviours and attitudes while pursuing their dreams.

Figure 2: Challenges faced by women in the music industry

Question asks: "What do you feel are the main challenges for women creators in today's music business?"



Source: MIDiA Research/TuneCore - Women Creators Survey 02/21, n = 401



Seven out of 10 men (from our smaller sample of 30 male respondents in the survey) also believed sexual harassment to be a key challenge for women in the industry. Due to both the severity of the issue and the publicity around it, particularly in the age of #MeToo, sexual harassment and discrimination are both prominently visible and being addressed within many music organizations and institutions, many taking decisive remedial action. However, these numbers reveal that sexual harassment and sexual objectification remain both prevalent and systemic, with little being done to anticipate, prevent and eradicate it from workplaces. Although harassment is now more commonly discussed (even in board meetings) it is only the tip of the iceberg. Sexualization and objectification are a consequence (or symptom) of unbalanced power dynamics, as shown by the

next 'big three challenges': ageism, identified by 38%, lack of access to male-dominated industry resources (36%) and lower pay (27%).

There are of course many other critical challenges, and we explore underlying issues related to unconscious bias, confidence, and lack of role models later in this report. This multitude of challenges act as a barrier to entry and career progress, discouraging women from entering the music industry or believing it to be a responsible personal choice to continue having a career in it. In addition to the more visible challenges, women creators face a plethora of deeper issues of unconscious bias and disproportionately low representation. For example, two fifths of female creators frequently feel a lack of confidence when performing or presenting work or ideas to

colleagues. One third frequently feel they are not being taken seriously or even that they are being dismissed or criticised outright when presenting work or ideas. Experiencing unconscious bias is a part of everyday reality for women in the music industry: over 90% of our respondents said that they had experienced unconscious bias – nearly half of them frequently.

Confirming the attitudes of the survey respondents, MIDiA's in-depth interviews revealed these to be all too common experiences. Unconscious bias takes many different forms. For a DJ, it emerged through an audience member being dissatisfied because of "sounds he wasn't used to". It also emerged in concert bookers unwilling to "take a chance on someone they didn't know or who didn't have a repertoire", reinforcing a bias towards who was featured on stage – male acts.

In the case of one female singer-songwriter, she was considered to have "serious competition" in the form of another female singer-songwriter on the same festival bill that featured multiple and varied artists. For a sound technician, it was watching male co-workers who were more confident (though no more technically proficient) progress more quickly through their early careers. It was also being placed on projects working with other women whose music genres were entirely outside of her own specialism, or only being noticed by label heads after she had "earned a name for herself".

For a female producer/singer, the bias was felt in being the only girl on a summer-long mixing and

"WHY DO WOMEN LEAVE MUSIC OR NOT GO INTO IT? FOR SOME, THERE'S 'ONLY SO MUCH ST YOU CAN TAKE!'"**

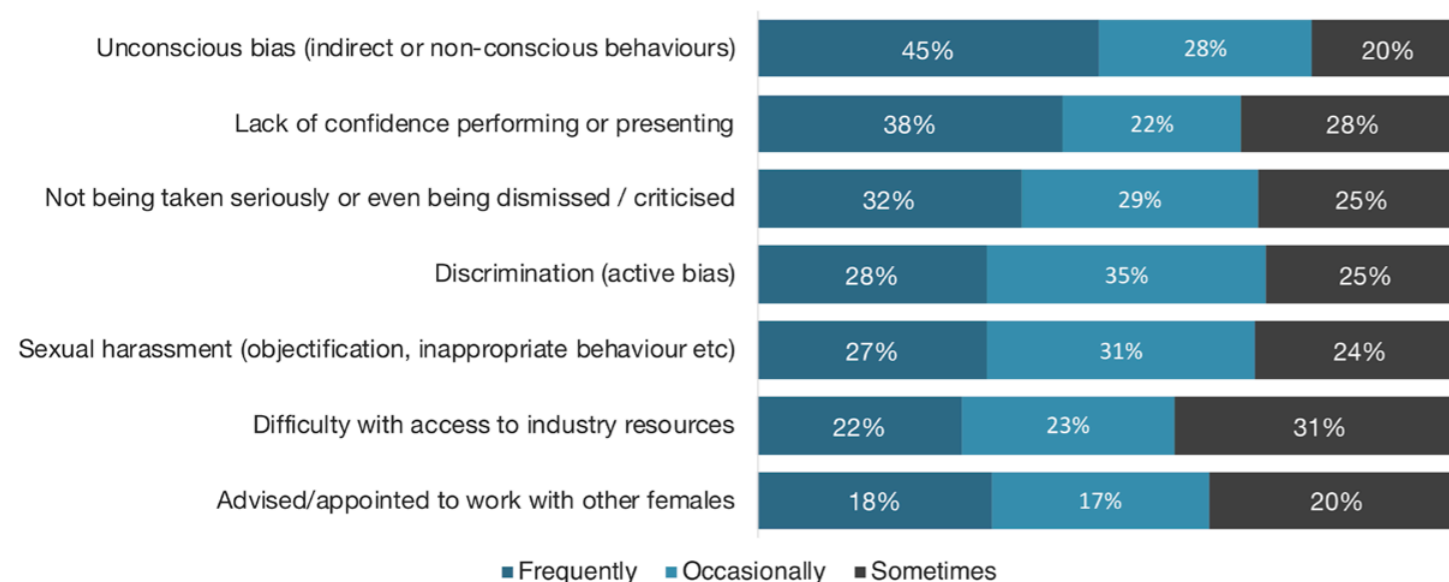
mastering course, in the disrespect for her skills by viewers of music-making videos ("girls can't produce") and a pervasive fear/lack of comfort in the idea of going into the male-dominated mainstream industry space. This was due to stories of harassment (and a related, internalized lack of confidence) pushing her to create almost entirely on her own and working only with female-dominated teams.

Some (but not many) women creators have found their way forward in spite of adversity. Some have found a way around these issues by working alone or more remotely, and some were assisted by networks and opportunities for both technical training and social support in furthering their careers – both female-centric organizations, as well as those mixed in focus, but keen to open opportunities to a more diverse set of creators. In recent years, the emergence of a set of networks set up and led by women for women in the industry, have provided a platform for female voices, concerns and to enable progress through research, access and support. Their work is cut out for them: over one third of women creators reported a lack of a support network that would be in a position to offer real help, support or encouragement.

BENEATH THE CHALLENGES: EXPERIENCES OF GENDER BIAS

Figure 3: Gender biases in the music industry (direct experiences)

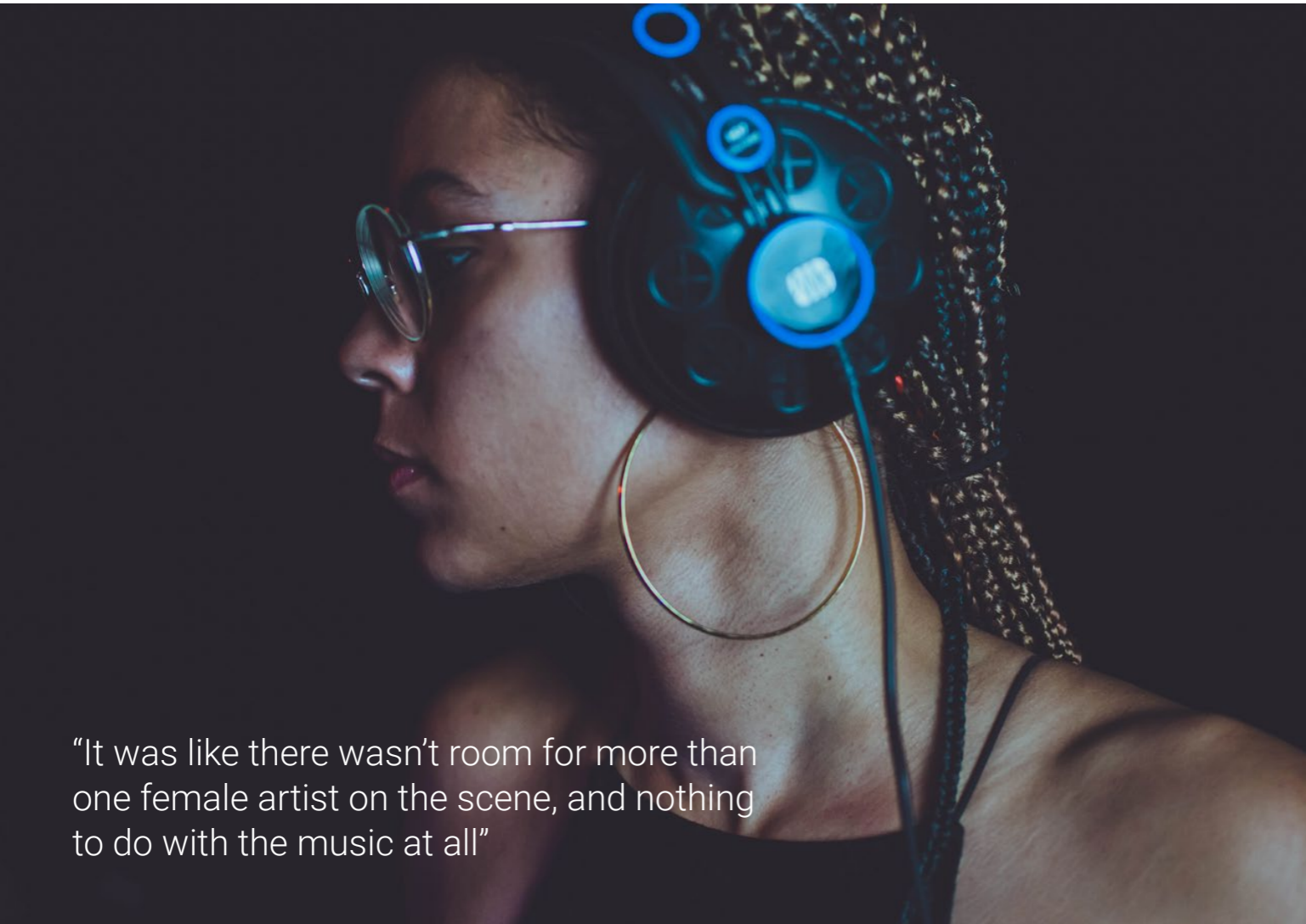
Question asks: "Have you experienced any of the following personally?"



Source: MIDiA Research/TuneCore - Women Creators Survey 02/21, n = 401



LESS SPECIAL TREATMENT, MORE EQUAL TREATMENT: EXAMINING THE CHALLENGES FURTHER

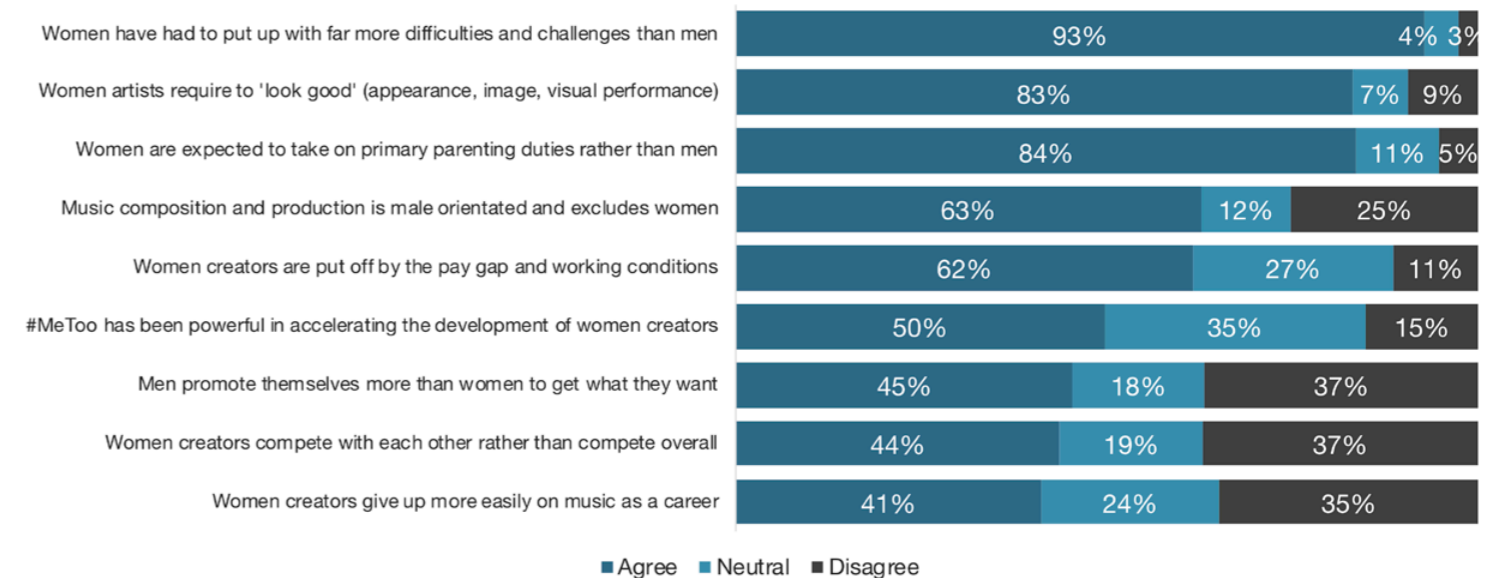


The music industry is a man’s world. Most women in the industry feel that they are held to higher expectations than their male counterparts. But women creators demand that they receive less special treatment and more equal treatment. A whopping 93% of women in our study believe that they have to put up with far more than men do to succeed. Recalling that two-thirds of our

sample said success means being respected and recognised in their scene, imagine how much harder that is to achieve in the industry we have mapped out so far. Female artists want the exact same things from their careers as men – recognition and a loyal fan base, but in reaching these goals, they have to overcome many more obstacles.

Figure 4: Gender bias in the music industry

Question asks: "How much do you agree or disagree with the following?"



Source: MIDiA Research/TuneCore - Women Creators Survey 02/21, n = 401



AGEISM AND THE 'BURDEN OF MOTHERHOOD'

Although the overall representation of women in society has increased over the past few decades, 84% of women still feel that there exists a perception that women are expected to take on the primary role of parenting duties. This is related to an alarming sense of bias around age; as we saw earlier, ageism is considered a major challenge by 38% of female creators. The music industry wants female artists to be young – partly a symptom of the industry’s youth obsession, but also so that women become successful before

they are presumed to decide to take on the role of motherhood. This makes women in their late 20’s feel the pressure of being ‘too late to the club’, with or without having the actual responsibility of parenthood. This presumption follows that women who choose to have children are not being serious about their musical careers, causing many women to drop out during parenthood due to stigma and lack of support provided to them by the music industry.

More inclusive and flexible parental leave policies are an essential requirement in the music industry for both genders – with the potential to reduce the burden and expectations laid on women as presumed primary caregivers. It will also allow more normalized healthy work-life balances for all members of the industry, and will in particular lessen the stigma and bias around age.

Policies like flexi-time as well as working from home, now normalized due to the 2020 pandemic, enable creators to work at their own pace while balancing their personal lives and needs. Home studios and live streaming concerts are some of the measures that can encourage more women creators into music, providing them with support and opportunities that may be harder for them to access traditionally. Online songwriter camps and music production courses are also ways of enabling more women in the industry, particularly addressing the issue of ageism.

THE MALE GAZE – WOMEN AND THE POP AESTHETIC

One of the major challenges that stands out for women creators is image: 83% of women agree that 'in order to succeed, it is a priority for women artists to look good (appearance, image, visual performance) as well as sound good'. Whereas a male singer/songwriter does not inherently need to worry overly much about their physical appearance at any point of their career, women are often expected to cover their authentic selves in makeup and costuming to become sensationalized caricatures. This discourages many women, but also heightens the impact of ageism, and can

undermine those female artists who must tailor their public personas to the appreciation of the male gaze. This also lends itself to a culture of sexual harassment and abuse, contributing yet again to the spinning record of interconnected issues.

NAVIGATING 'GENDERIZATION' AND UNCONSCIOUS BIAS

Music composition, production and sound has long been connected primarily with men, so it is no surprise that the majority of female creators (63%) feel excluded from the composition and production, which makes this aspect of music creation at least partially 'genderized'. Some elements of genderization are being effectively navigated by female creators.

In our pre-survey interviews, some creators felt that women were being 'corralled' to compete with each other (for places on local tour circuits, or being signed to label rosters). While 44%

of women in the survey sample believed that women compete with each other more than they do overall, 37% disagreed with this idea. Our interviews again shone some light on this, with one DJ explaining that while initially there was much competition between female acts, much of her focus now is on being supportive and open to other female creators. It is clear that women are beginning to deflect focus from competition between each other. Another encouraging finding was that women are not giving up on the industry more easily than men, with 41% agreeing, but 35% disagreeing with this idea.



"THE #METOO MOVEMENT HAS BROUGHT FORWARD ABUSIVE POWER RIFE WITHIN THE FILM INDUSTRY, AND THIS HAS ENCOURAGED THE MUSIC INDUSTRY TO FOLLOW SUIT IN SOME WAYS – I FEEL IT'S GETTING EASIER/ THERE'S MORE SUPPORT FOR WOMEN TO COME FORWARD WITH THEIR STORIES OR TALK MORE OPENLY ABOUT THEIR EXPERIENCES AND WE'RE BECOMING MORE AWARE - IN TURN MAKING THE INDUSTRY FEEL A LITTLE SAFER AND MORE ACCESSIBLE."

AWARENESS, COURAGE AND ACTION #1 – THE GROWTH AND ROLE OF NETWORKS

As previously stated, the past five years or so has seen the emergence of a number of women-first or female-focused networks, industry groups and organizations that have set themselves a mission to raise the awareness of many of the issues we discuss in this report, and to design initiatives and programmes to help fix some of them. This includes:

- Commercial and investment ventures, women-led labels, publishers (e.g. GoToEleven)
- Training and skills-based organizations (e.g. Women's Audio Mission, We Are Moving The Needle, SoundGirls, Gender Amplified, Women in Live Music)
- Media organizations (e.g. SheShreds, Women in music journalism collective, Pass The Aux), Gal-dem
- Policy and advocacy groups (e.g. sheisthemusic, SheSaidSo, The F List, Womxn in CRTL, Women in Music, Girls I Rate, Change the Conversation, Gal-dem, Rhythm Sister, Girls to the Front, Girls Behind the Rock Show)
- Indexes and directories (e.g. The F List, Women in Music Index (Music Cities Network))

The good news is that awareness of these groups and their work is on the increase. Some 80% of female creators were aware of at least one of these organizations (awareness outside the USA and UK was slightly lower, 76% in the combined other countries). However, there is a gap between awareness and membership, with just under two-thirds of our sample not belonging to any one particular group (71% in the UK, 66% in the US and 82% across the other countries in the study). Some of the most well-known organizations such as Women in Music and SheSaidSo, are closing the gap between awareness and active membership. We would like to see a global register of all women-first industry organizations, with their propositions and services articulated and clarified, along with their global reach and country operations. This would help other types of music organizations become clearer on their purpose and more active in driving up participation through cross-membership, partner and affiliate links. A register would help women creators from markets outside of the UK and USA become more aware of the groups available to them.

71% OF WOMEN IN THE UK & 66% IN THE US ARE NOT MEMBERS OF A FEMALE-FOCUSED GROUP

AWARENESS, COURAGE AND ACTION #2 – THE ROLE OF INSPIRATIONAL FEMALE ARTISTS

Figure 5: The role models of women making music



While over a quarter believe that more role models would encourage more women to make music as a career choice, there is a long list of well-known women that have achieved the highest levels of success in the industry. Figure 5 (page 22) depicts some of the artists, songwriters and notable women that survey respondents said inspired them. Without exception, each of them has faced some or many of the same issues and challenges highlighted in this study.

Alicia Keys, Taylor Swift, Beyoncé, Lady Gaga, Missy Elliot and Bjork are all famous names and powerful role models mentioned by those creators in this study. Yet the list also contains long-time songwriters Linda Perry and Diane Warren, producer/songwriter Nija Charles, classical cellist Hildur Ingvaldardóttir Guðnadóttir, mastering engineer Emily Lazar, producer and engineer Sylvia Massy, WondaGurl (record producer, songwriter and executive) and Russian DJ Nina Kravitz.

The list includes women from the more avant-garde scenes who have innovated with music, visual effects and technology including Laura Escudé, Laurie Andersen, Amanda Palmer and Imogen Heap. It also includes many of the new generation of women pop superstars including Ariana Grande, Billie Eilish, H.E.R., Lizzo, Lana Del Rey, FKA Twigs and Halsey.

There were also multiple mentions (we asked for up to three names, unprompted recall) for Michelle Obama, poet/activist Maya Angelou, music author/biographer Lesley-Anne Jones and music industry executives Jody Gershon and Sylvia Rhone, along with Terri Winston, founder and executive director of Women's Audio Mission (and, for 13 respondents, their own mothers). The list also includes music icons such as Grace Jones, Joni Mitchell, Aretha Franklin, Dolly Parton, Patti Smith and Madonna.

What this list illustrates is that inspiration and role models to women creators can come from all walks of the industry (and sometimes outside of music). It shines a light on their achievements – what they have done – in what is a highly-challenging environment.

The list is a strong message for the industry to recognise the strength of their commercial success and contribution to popular culture, but also the music business, classical music, music production and the avant-garde.

We encourage the various women-first, but all music organizations – labels, publishers, distributors and trade associations, to recognise prominent women that can contribute inspiration through being industry and organization role models.

AWARENESS, COURAGE AND ACTION

#3 – POSITIVE DEVELOPMENTS FOR WOMEN CREATORS DURING 2020

Improvements in individual experiences are a positive sign, even if they are not enough to solve the wider problems discussed in this report. In this study, we asked the open question “what improvements and positive developments have you seen during the past year for women creators in today’s music industry?” and we have classified the responses as follows:

1. Seeing more representation and recognition
2. More resources, support and initiatives for women creators
3. Feeling more empowered and confident in speaking up
4. The pandemic creating more balanced opportunities

Figure 6: Positive developments and changes

Question asks: “What improvements and positive developments have you seen during the past year from women creators in today’s music industry?”



Source: MIDiA Research/TuneCore - Women Creators Survey 02/21, n = 401



WOMEN HAVE FELT MORE EMPOWERED AND CONFIDENT TO SPEAK UP

The majority of women creators noted some improvements in seeing more women in under-represented positions, such as production, songwriting and leadership roles. However, the responses included a variety of roles such as female teachers, engineers, rappers, rock musicians and more. Representation is important for every aspect of the industry, not just for the most visible sectors.

Many women here noted improved recognition and awareness across the industry, particularly for issues surrounding the representation of diverse and marginalized female communities. Furthermore, some women also noted the increased awareness of many issues reported here from male colleagues, showing the value of everyone's involvement in the conversation around women's challenges.

The next largest improvement has been in the increase in resources and support available to women creators. These have been in the form of particular initiatives such as Alicia Keys' 'She Is The Music' movement, the Keychange 50/50 scheme and the huge growth in networks and programmes that are making women feel more supported within the wider industry. Many women reported feeling more empowered to speak up and raise their voices. Furthermore, some reported feeling inspired to take up music-making and production.

This change is being driven organically by women themselves, who are feeling more comfortable with sharing their stories and trying new experiences knowing that they have peers to share these with and support networks to advise them.

A small group of women recognised the pandemic as a positive influence, creating more balanced opportunities in the online world such as greater access to panels and support groups online that they did not have before.

One obvious impact of the pandemic lockdowns has been the opportunity women have to make music safely at home. More women are turning to creator tools, perhaps out of necessity, and are discovering that they are more than capable of taking a DIY approach to their careers. Being at home has provided women with more time, resources and opportunity.

"MORE WOMEN ARE TURNING TO CREATOR TOOLS, AND ARE DISCOVERING THAT THEY ARE MORE THAN CAPABLE OF TAKING A DIY APPROACH TO THEIR CAREERS"

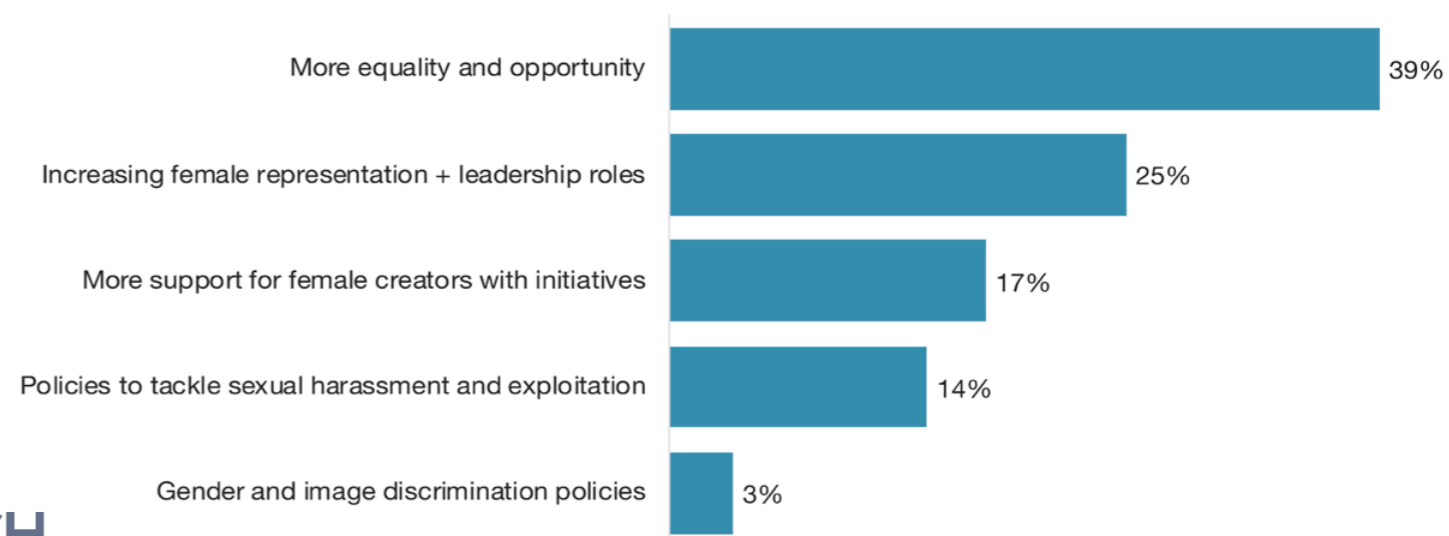
A CHANGE AGENDA STARTING NOW

So far we have explored the main challenges for women creators making a career in music, and we have looked at the potential solutions and some of the deeper, endemic obstacles that might get in the way of these solutions. However, we also asked very simply, what do women creators feel must change most urgently to improve the music industry as an environment in which women can do their jobs? We summarised the majority of open ended answers into four categories:

1. Creating more equality and opportunity
2. Seeing more female representation and leadership
3. Providing more support, recognition and resources
4. Tackling sexual harassment, objectification and ageism

Figure 7: Most urgent changes required

Question asks: "What do you feel needs to change most urgently in order to improve the music industry for women?"



Source: MIDiA Research/TuneCore - Women Creators Survey 02/21, n = 401



Proactively creating opportunities for women, especially in the most male-dominated sectors such as music production and composition, is one way forward to address the lack of opportunity that women creators face. However, simply creating more opportunity is not enough: women also need equal pay, and to be recognised as equals in the music industry.

Women creators believe that seeing women in leadership positions can help drive change that improves the music industry. Getting women into these positions is the first step, but women need to be able to have access to their stories and journeys. Creating platforms for women in leadership positions across various roles and sectors within the music industry can inspire women creators that they can break through what they perceive as the 'boys club'.

Secondly, women want to see more leadership and representation across identities beyond gender. Women of colour and LGBTQ women can face more obstacles and see fewer role models than white, heterosexual and cis-

gendered women. Representation is most effective at driving change when it is inclusive of all women, especially those that come from the most marginalized communities.

Women feel that they do not get the same access to support and resources as men. A big factor driving this is the lack of recognition for a need of particular resources and spaces by men in the industry, although many women commented on a lack of unified support from other women. Networks, mentoring and access to women-friendly spaces can drive the change that is needed.

Women feel a particular lack of support from men and occasionally from other women. There were a concerning number of responses expressing that women simply need to change their attitude and should work hard and support each other 'just like the men'. These attitudes embody the issues that women face in failing to receive the supportive attitudes needed for change as well as having their unique challenges recognised across all levels of the music industry.

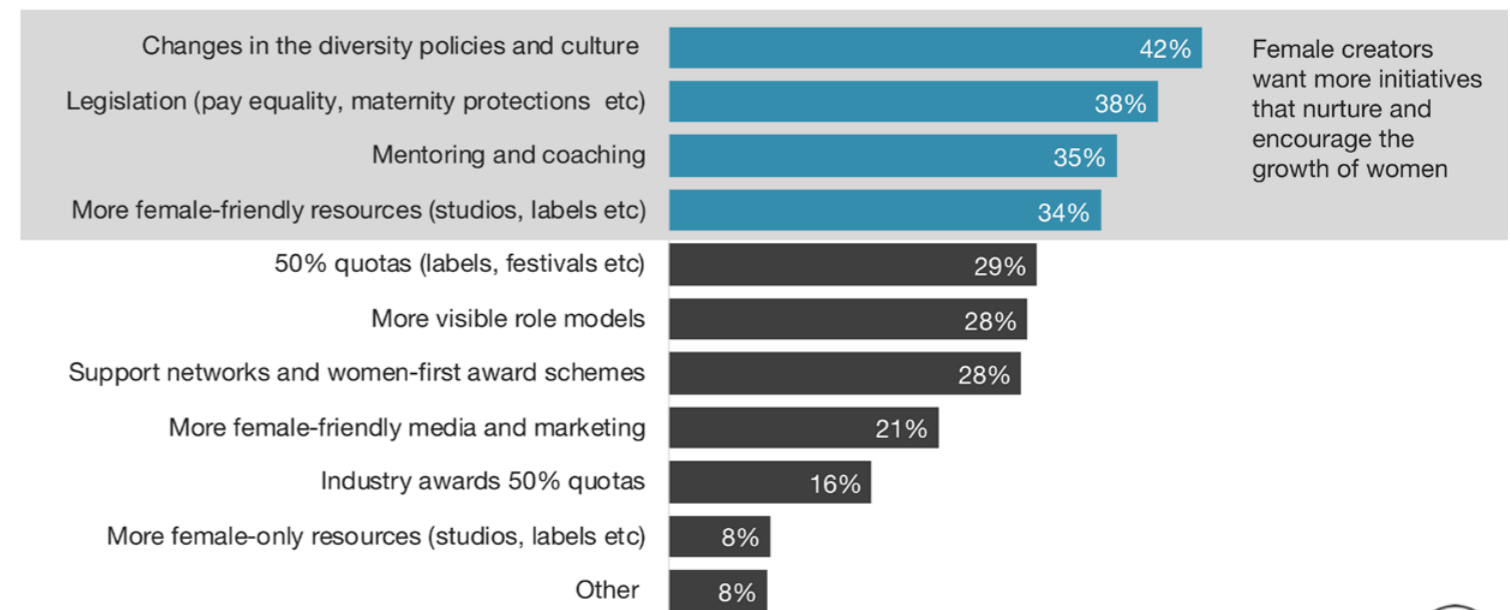
WELCOMING WOMEN TO MUSIC

Despite these challenges and the music industry's systemic problems, some women do of course succeed - they navigate their way through a sea of challenges. Nothing exemplifies this more than the role models that women creators look to for inspiration and resilience (explored in

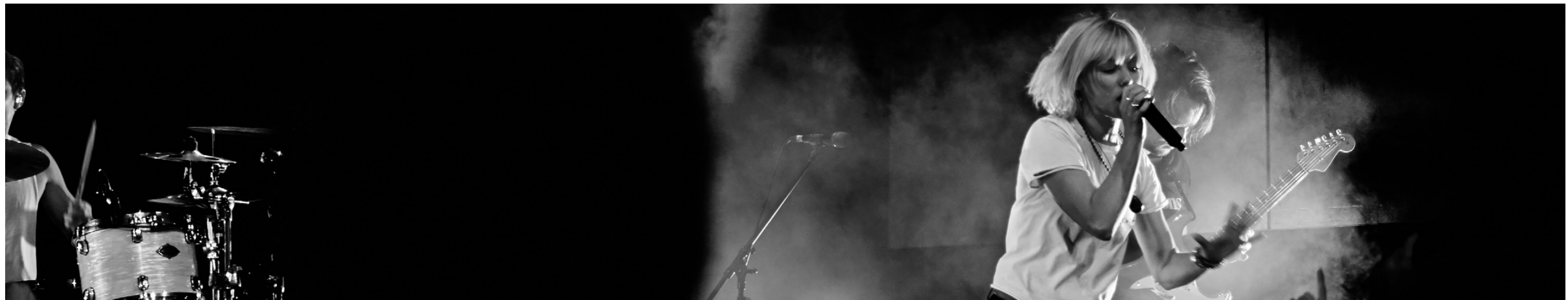
section **Awareness, courage and action #2**). We wanted to use this study to understand and articulate the issues that women face in the industry, but we also wanted to go beyond the problems and look for potential solutions.

Figure 8: What would bring more women to the music industry?

Question asks: "What would encourage more women to take up music a career choice?"



Source: MIDiA Research/TuneCore - Women Creators Survey 02/21, n = 401





leave options. Without a proper infrastructure supporting women (and supporting men as parents), the growth of more women leaders and success stories will continue to be slow, hindered and the exception rather than the norm.

Some 35% of women creators want more change to come from learning and shared experiences in the form of coaching and mentoring. While the number of female faces in the industry has been increasing

field. Less formal vehicles too, such as sharing circles, networking events and women leaders workshops will help to create a stronger support system. There is a key role here for the emerging group of women-first networks, for example. These networks also provide a platform for more visible role models that creators want to see (28%). With organizations critical to driving change, music companies should look to invest and partner with the emerging network and industry groups such as Women in Music, SheSaidSo et al. to develop and provide more female-friendly resources and support for women creators.

Women need to also find themselves in trustworthy and comfortable spaces to discuss their experiences with people who have the authority to take action and make decisions.

35% OF WOMEN CREATORS WANT MORE CHANGE TO COME FROM LEARNING AND SHARED EXPERIENCES IN THE FORM OF COACHING AND MENTORING

First and foremost, creators want changes to come from within organizations and from leaders across the music industry through diversity, policies and culture. Many organizations have begun this process, but 42% of creators want to see more impact, and sooner.

Meanwhile, 38% of female creators want to see this organizational change underpinned by legislation. On their way to success, women constantly find themselves in cultures and systems designed for men. Men in positions of leadership, important technical roles, on higher pay and without parental

42% OF CREATORS WANT TO SEE MORE IMPACT AND SOONER

in many areas from the boardroom to country playlists, more deliberate role models need to be surfaced and given a platform – perhaps encouraged to participate in filling the gap in mentoring and coaching, for example. It is not easy for women who are striving to make a way for themselves in the industry to dedicate time to help other women, nor should it be expected of them. However, we see a facilitation role here for networks, industry associations and operating companies, to create structured initiatives to help direct new women into the industry, and then train and develop them in their preferred creative

Some 28% of female creators believe that support networks and women-first award schemes giving female creators a stronger stage and industry voice is key to better female representation in the music business.

While both have important roles to play, women-friendly resources (34%) are more advocated by female creators than women-only resources (8%). It is clear that women would rather be a part of the group dynamic and increase their representation than create specific spaces that exclude men altogether. Men have an important part to play in resolving the gender gap and being inclusive of all genders is where this begins. Ultimately, mixed-gender work environments will benefit from the separate and diverse skills of different genders – this seems to be the key message from women creators.

Another contrast in the results is in the application of quotas for female artists. Almost twice as many (29%) of women creators advocate 50% quotas for female artists on festival line-ups and label rosters, compared with 16% believing in 50% quotas at music industry awards. This may reflect that 40% of our sample was made up of independent artists, who first want an opportunity to present their musical talents before they go on to receive industry affirmation. It is clear that what women want is not necessarily acknowledgement and awards, but rather, equal opportunities to showcase their talents in equal comparison to their male counterparts. Enforcing quotas for labels and festivals would certainly be a new step for A&R's and promoters/bookers to work harder to find and nurture more female talent, playing another key role in increasing representation.



29% of women creators advocate **50%** quotas for female artists on festival line-ups & label rosters, compared with **16%** for **50%** quotas at industry awards

APPENDIX: THE SURVEY SAMPLE

The Women Making Music survey was distributed globally via the networks of a score of organizations and influencers across the music industry value chain. There were 504 respondents, of which 401 were female creators - making this the largest survey of female music makers to date. The small sample of male creators allowed us to test differences of perception and awareness, but were not asked to complete a section of the survey reserved entirely for women.

A majority, 48%, were in the US, followed by 27% in the UK, 4% in Canada and then smaller groups of responses from all over the world including Mexico, Russia, New Zealand, Turkey, and the Philippines.

One third were 25–34 years old, with a further quarter aged 35–44, 18% aged 20–24, 13% aged 45–54, 7% aged 55+ and only 4% aged 16–19. This means the majority are in the early to middle stages of their careers, with representation from veterans of the industry as well as a few new entrants. They mostly identified as artists, songwriters, and producers, and 42% were independent artists, releasing music without any record label relationship.

These artists are driven and independent. To them, success looks like being respected and recognised in their scene (67%), being able to make music and have people enjoy it without worrying about earnings or stream counts (52%) and to build up a loyal fan base (52%). That fan base may be a global one (33%), although equally appealing is being a successful touring artist (35%).

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PRS Foundation
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Association for Electronic Music (AFEM)
British Council
UD (prev. Urban Development)
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