

Keychange - Working Towards Gender Balance in the Music Industry

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Introduction

Context

Striving towards gender balance is an important topic within the music industry and beyond. Supported by the Creative Europe Programme of the European Union, Keychange is a key change agent in the global music industry. Describing themselves as a global movement starting in 2017 (Keychange, 2022), the main goal is to increase representation and improve the position of 'under-represented genders' throughout the music industry. To do so, organisations within the music industry around the world sign agreements ('pledges') with Keychange. More specifically, signing a Keychange Pledge means to commit to working towards at least 50% women and/or under-represented genders in varying areas, such as programming, staffing, acts and commissions. Music organisations sign an individual pledge in which they can set their own goals, making the pledge most relevant to the context of each organisation.

Research Assignment Erasmus University Rotterdam

Keychange has sought collaboration with the Erasmus University Rotterdam to analyse reported data from individual signatories with regard to efforts and involvement with the Keychange gender balance pledge goals. The goal is to acquire knowledge about how signing the pledge may have been of value to signatories, as well as the work done by the involved pledge signatories during the reporting period. In addition, we explore what challenges signatories experience and how Keychange could play a role in overcoming these challenges.

The research question is two-fold, both indicating the importance of the larger framework Keychange provides (question 1) as well as the individual efforts put in by Keychange signatories (question 2):

1. How did pledge signatories experience their involvement with Keychange?
2. To what extent and how did Keychange Pledge signatories reach their goals and what challenges did they experience in progressing towards their goals?

Project goals

With this report we want to reach the following goals:

- Present descriptive findings of the number of acts, performers, panellists and employees from under-represented gender categories and categories related to race-ethnicity that signatories listed over the years;
- Describe the challenges signatories experienced and the actions they have undertaken to reach their goals over the years;
- Indicate how the efforts of Keychange, as a broader framework, are experienced and evaluated by individual signatories;
- In doing so, we provide a report that helps Keychange improve existing and develop new practices with regards to their organisation and pledge.

Terminology and Abbreviations¹

AFAB: Assigned Female at Birth

AMAB: Assigned Male at Birth

Asexual/Ace: "A person who does not experience sexual attraction to another person" (Youth, 2016).

DEI: Diversity, Equity and Inclusion

(Dis)ability: "The socially constructed system of norms which categorizes and values bodyminds based on concepts of ability and disability" (Schalk, 2017)

Diversity: Often used to refer to a variety of dimensions of difference, not limited to but for example including (dis)ability, gender, sexuality, race-ethnicity, age, life course, social class, religion, migrant trajectories, language, nationality. (Hoekstra & Pinkster, 2019; Swartjes & Berkers, 2022)

Equality: "Concept to denote the right of groups of people to be treated in the same way, equally and fairly, irrespective of their personal traits such as their gender, race, beliefs, or ability. Made prominent by women's demands to be treated equally with men in the workplace, it has also been the demand of others discriminated against on the basis of their sexual orientation or their age." (Griffin, 2017)

Equity: "This concept refers to being treated fairly and justly. In many contexts such as the labour market the opposite, inequitable treatment, occurs. This is discrimination, and may relate to differential pay given to women and men, or people being discriminated against on the basis of their sexual orientation" (Griffin, 2017)

Gay: "A common and acceptable word for male homosexuals, but used for both genders" (Youth, 2016)

Gender: "Socially constructed roles, behaviors, and attributes considered by the general public to be 'appropriate' for one's sex as assigned at birth. Gender roles vary among cultures and time continuums" (Youth, 2016)

¹ This is not an exhaustive list of concepts and definitions related to diversity and inequality. It only defines concepts that were used in this report.

Inclusion: "As widely conceived, inclusion is closely connected with social justice concerns for equality and rights for all. In this conception it often refers to social inclusion, which is concerned with reducing inequalities between the relatively disadvantaged sectors of society and the relatively advantaged. In this sense it may refer to race, gender, social class, disability, learning difficulties, religious affiliation etc." (Wallace, 2015)

Indigenous peoples: "Those peoples and nations that have a historical continuity with pre-invasion and pre-colonial societies that developed on their territories and consider themselves distinct from other sectors of the societies now prevailing in those territories (or parts of them)." (Sanders, 1999)

Intersectionality: "Particular forms of intersecting oppressions, for example, intersections of race, and gender, or of sexuality and nation" (Pelak, 2007)

Lesbian: "A femininely identified individual who is emotionally, physically, romantically, sexually, and/or spiritually attracted to femininely identified individuals" (Youth, 2016)

LGBTQIA+: Lesbian, Gay, Bi, Trans, Queer, Intersex, Asexual

Intersex: "A person whose natal physical sex is physically ambiguous" (for more information see Youth, 2016)

Non-Binary Gender: "(a)gender as broader, less defined, more fluid, and a more imaginative and expressive matrix of ideas. It challenges power differentials, by deconstructing and reconstructing ideas, reflecting on disjunctures, unpacking gender, gender identities, and gender expressions, and providing opportunities for new knowledges to emerge" (Youth, 2016)

Minority groups: "Since the 1930s this term has been applied to social groups that are oppressed or stigmatized on the basis of racial, ethnic, biological, or other characteristics." (Scott, 2014)

Minority ethnicity: "Minority ethnicity group is defined as 'a group of people who, because of their ethnic characteristics, are singled out from the others in the society in which they live for differential and unequal treatment and who therefore regard themselves as objects of collective discrimination" (Scott, 2014)

Queer: "Despite the negative historical use of this term, it has been embraced in the last decade, particularly by younger members of

the GLBT community. It is an umbrella term that many prefer, both because of convenience (easier than 'gay, lesbian, etc.')

and because it does not force the person who uses it to choose a more specific label for their gender identity or sexual orientation. Queer also refers to a suspension of rigid gendered and sexual orientation categories and is underscored by attempts to interrogate and interrupt heteronormativity, reinforced by acknowledging diverse people across gender, sex, and desires, as well as to foreground the sexual. It embraces the freedom to move beyond, between, or even away from, yet even to later return to, myriad identity categories. Queer is not relegated to LGBT*IQGCQ people, but is inclusive of any variety of experience that transcends what has been socially and politically accepted as normative categories for gender and sexual orientation" (Youth, 2016)

Race-ethnicity: "A feature of the definition of race, race-ethnicity signifies the sectors of the population with similar racial characteristics that form a discrete ethnic group; that is, share certain characteristics on the basis of common historical origin, close-knit patterns of social interaction, and a sense of common identity." (Scott, 2014)

Safe space: "A place where people who identify within the LGBTQIA communities feel comfortable and secure in being who they are. In this place, they can talk about the people with whom they are involved without fear of being criticized, judged, or ridiculed. Safe spaces promote the right to be comfortable in one's living space, work environments, and so on. It is focused toward the right to use the pronoun of a significant other in conversation, and the right to be as outwardly open about one's life and activities as anyone else" (Youth, 2016). Recently, scholars and practitioners have started to use the term 'safer space' instead to denote that "no environment can necessarily be completely safe" (Deller, 2019)

Social class: "The position of the individual in the hierarchy of prestige in the society at large." (Scott, 2014)

Social justice: "A state of affairs (either actual or ideal) in which (a) benefits and burdens in society are dispersed in accordance with some allocation principle (or set of principles) (b) procedures, norms, and rules that govern political and other forms of decision making preserve the basic rights, liberties, and entitlements of individuals and groups; and (c) human beings (and perhaps other species) are treated with dignity and respect not only by authorities but also by relevant social actors, including fellow citizens" (Jost & Kay, 2010)

Transgender: “The words transgender and trans [...] refer to individuals who do not identify with the sex assigned to them at birth. This includes individuals who identify as non-binary (neither exclusively female nor exclusively male), those who identify as trans women or trans men, and those who identify simply as women or men (or women/men or trans experience), but who were not assigned to that category at birth” (Zimman, 2017)

Under-represented genders and gender minorities: “This term acknowledges genders who are underrepresented in music, and anyone who has encountered barriers because of their gender. We do not just include cis women in our campaign for equality, we also welcome applications and encourage our festivals to empower minority genders including (but not limited to) agender, gender queer and non-binary, and trans people (AMAB and AFAB).” (Keychange, n.d.)

*Womxn/Women**: Even though there is some disagreement around the definition and possible exclusionary characteristics of this term, people that do use the term use it as an intersectional concept that seeks to include transgender womxn, womxn of color, womxn of [the Global South]², and every personal identity of womxn. (Kunz, 2019)

Summary and Conclusion

We summarise the most important findings with regards to the efforts and involvement of Keychange Pledge signatories in working towards gender balance in the music industry. We divide these findings in five categories: 1) value, 2) impact, 3) actions, 4) challenges and 5) recommendations.

Value

The Keychange framework is considered valuable to signatories as it holds them accountable to their pledge goals and provides them with a specific goal to work towards. Having signed a Keychange Pledge also adds to signatories’ public credibility, which for example helps to pitch their projects, secure funding and expand their networks to partners and audiences with similar values. Being part of the Keychange network moreover provides signatories with a sense of solidarity and shared purpose.

² The original quote used ‘Third World countries’ instead of ‘the Global South’.

Impact

Initiated by Keychange Partners in Europe in 2017 and focusing mostly on festivals and events, Keychange has noticeably broadened the types of organisations and the number of countries involved. While the number of signatories achieving their pledge goals noticeably increases, almost half of the signatories have not or could not yet provide sufficient data on the achievement of their pledge goals. When data are available, signatories seem to mostly achieve or move towards their gender balance pledge goals in terms of Acts and Panellists (while not for Performers and Employees). While the Keychange Pledge has thus far been focused on gender representation, since 2019, signatories have been invited to share voluntary data on the representation of different races and ethnicities represented in their work, with the data collected so far suggesting that few signatories have achieved ethnicity balance with regard to Acts, Panellists or Performers.

Actions

Signatories have developed a wide variety of actions to work towards their gender balance goals, also reflecting the wide range of organisations that have signed a Keychange Pledge. This could range from raising awareness within their teams and publicly, extending their professional networks, adjusting booking and recruitment strategies, to monitoring their line-ups and developing specific programmes and projects. Keychange supports signatories in these efforts by providing guidelines and best practices, as well as a clear framework to publicly share the pledge and its goals.

Challenges

Signatories experience a range of external and internal challenges in achieving their goals. Externally, signatories express experiencing difficulties in working together with partners and organisations that do not share similar goals, and/or experiencing issues with booking a gender-balanced line-up from a limited pool. While COVID-19 proved challenging for all organisations in the music industry, signatories suggest that it also provided a moment of reflection and possibility to change pre-existing practices. Internally, signatories have experienced challenges with regard to monitoring, finances, pre-existing rules, regulations and booking strategies and within-team dynamics.

Recommendations

- Working towards gender balance within the music industry requires an approach that involves actions formulated in the context of multiple categories of people with backgrounds that are underrepresented in the music industry. This requires an intersectional approach to monitoring and a shared understanding of a variety of intersectional characteristics, for example also including social class, race, ethnicity and (dis)ability.
- Working towards gender balance requires the involvement of all ecosystem actors. Within the initial pledge, there was a considerable focus on music festivals and the power they have to attain gender balance in the music industry. While these festivals are making progress and are a vitally important part of the broader music ecosystem, there are other actors that have become involved in the Keychange Pledge over the years, for example booking agencies, broadcasters, record labels and commercial music companies, as well as music education institutions and trade organisations. All these actors would need to increasingly become part of the changes Keychange is working towards as they now, sometimes, prove to pose challenges to signatories wanting to enact sector-wide change.
- Working towards gender balance requires balancing between a context-specific approach and a critical mass. While Keychange started out as a framework mostly focused on music festivals in Europe, they have broadened their activities to a global range, including many different types of organisations. For example, a continued focus on increasing the number of organisations in categories beyond festivals, may help in reaching goals with regard to panellists and performers. Acquiring a critical mass of signatories in each individual country, may also help in working towards Keychange Pledge goals.
- Working towards gender balance requires a uniform and consistent monitoring system. As a collaborative framework, Keychange already provides guidelines, best practices and monitoring support to individual signatories. To extend this in the future, Keychange could offer further training and guidance in the use of appropriate metrics, diversity language, and definitions of varying categories of identification.
- Working towards gender balance requires a unified terminology for pledge goals, including a shared understanding of varying categories of identification. Creating individual pledge goals for each signatory, making them most specific to the context of each organisation, helps in reaching pledge goals in a variety of contexts. However, signatories often seem to engage

in non-specific language with regard to diversity and their goals, making it difficult to gauge what the specificities of their individual pledge goals are and if they are being reached. To measure success, goals need to be SMART (Specific, Measurable, Achievable, Relevant, Time-Bound). While some goals are formulated in this way already, Keychange could support the creation of a more uniform approach.

Methods

Reach, sample and definitions

Survey

The research focuses on a combination of quantitative and open-ended questions from a survey distributed to signatories by a Keychange representative between 2017 and 2022 through a Google Form. Signatories were asked to complete the form on an annual basis within a month after their event or reporting period. In this report, we included all signatories that signed up to Keychange in this timeframe, meaning that we include 613 signatories.

Measurements

In the form (for specific questions see Appendix A), which was developed and distributed by Keychange representatives, signatories were asked to provide information on varying areas, including

1. Numerical data with regards to progress to the organisation's specific pledge(s);
2. Numerical data relating to their targets and progress in relation to gender;
3. Qualitative information about any steps implemented to achieve pledged targets;
4. Qualitative information about any challenges signatories experienced;
5. Information about the event/organisation itself;
6. Voluntary information about representation of minority ethnicities and indigenous peoples within programming;
7. Information about the effects of the pandemic on achieving progress towards pledges.

Research methods

- A quantitative analysis using SPSS (Statistical Package for the Social Sciences)
 - o The survey data provided by Keychange amounts to 613 signatories in total.
 - o The dataset was cleaned in Excel and uploaded to SPSS.
 - o Descriptive statistics of percentage categories with regard to acts, performers, panellists, speakers and employees were calculated and depicted in tables and graphs.
- A qualitative thematic analysis using Atlas.ti (a computer-assisted qualitative data analysis software)
 - o The open-ended questions were uploaded as separate documents in Atlas.ti.
 - o Questions were coded using broad thematic categories.

Results

Quantitative Results

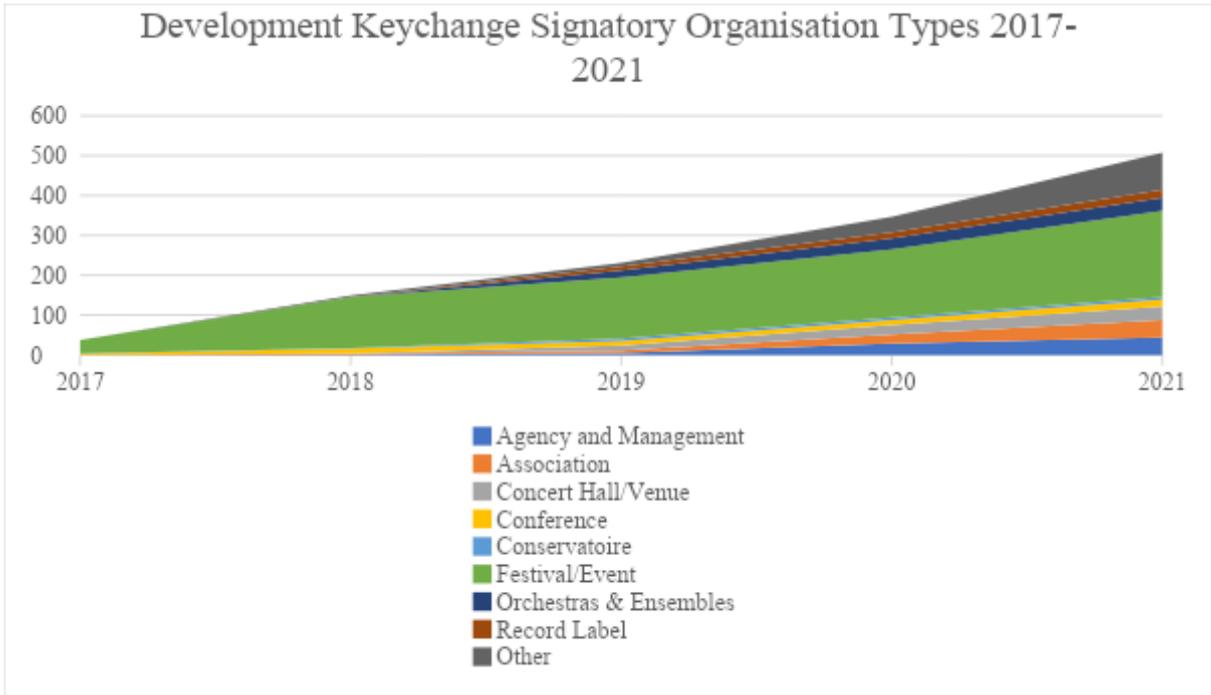
>> Types of Organisations

The data gathered by Keychange lists a total of 613 unique signatories. Most signatories are either festivals or events, with 248 signatories (40.5%) belonging to this category.

Table 1: Types of organisations

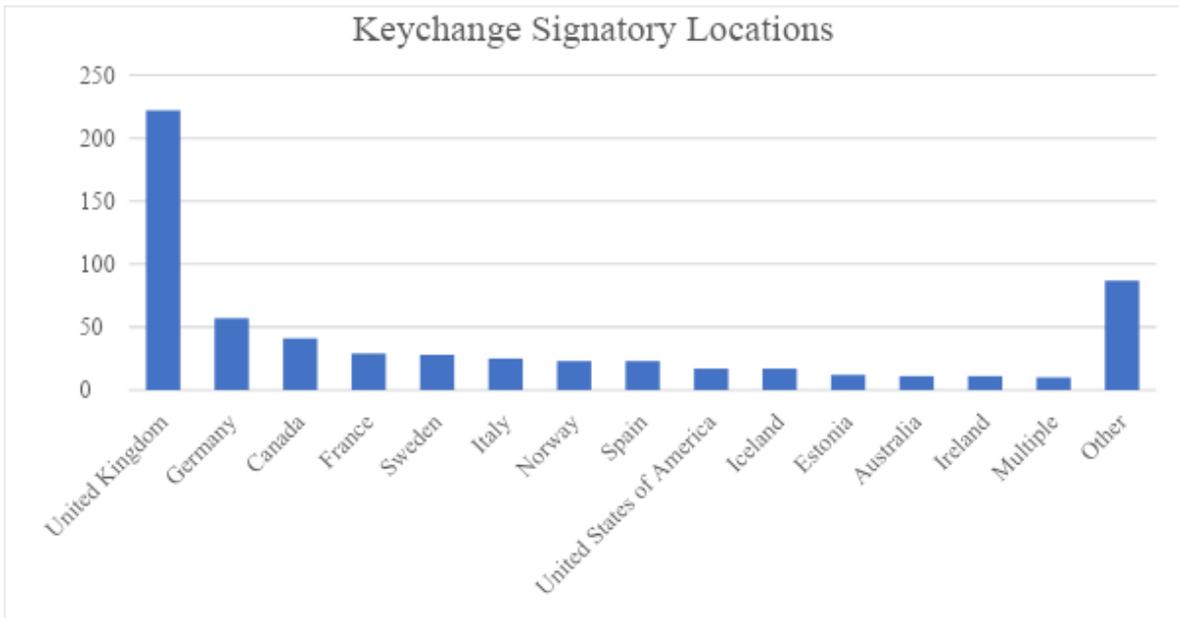
Type	Frequency	Percent
Festival/Event	248	40.5%
Association	56	9.1%
Agency & Management	49	8.0%
Concert Hall/Venue	42	6.9%
Orchestras & Ensembles	34	5.5%
Conference	33	5.4%
Record Label	23	3.8%
Websites & Magazines	14	2.3%
Education	13	2.1%
Promoter	13	2.1%
Broadcaster	10	1.6%
Other	78	12.7%
Total	613	100%

In Figure 1 below, the development of the types of organisations signed up to Keychange between 2017 and 2021 is shown (also see Appendix C, Table 1). While the number of festivals/events takes up the largest proportion in all years, other types of organisations are becoming increasingly involved, especially since 2020. Following 2020, we especially observe an increased involvement of booking agency and management organisations, associations and concert halls and venues.

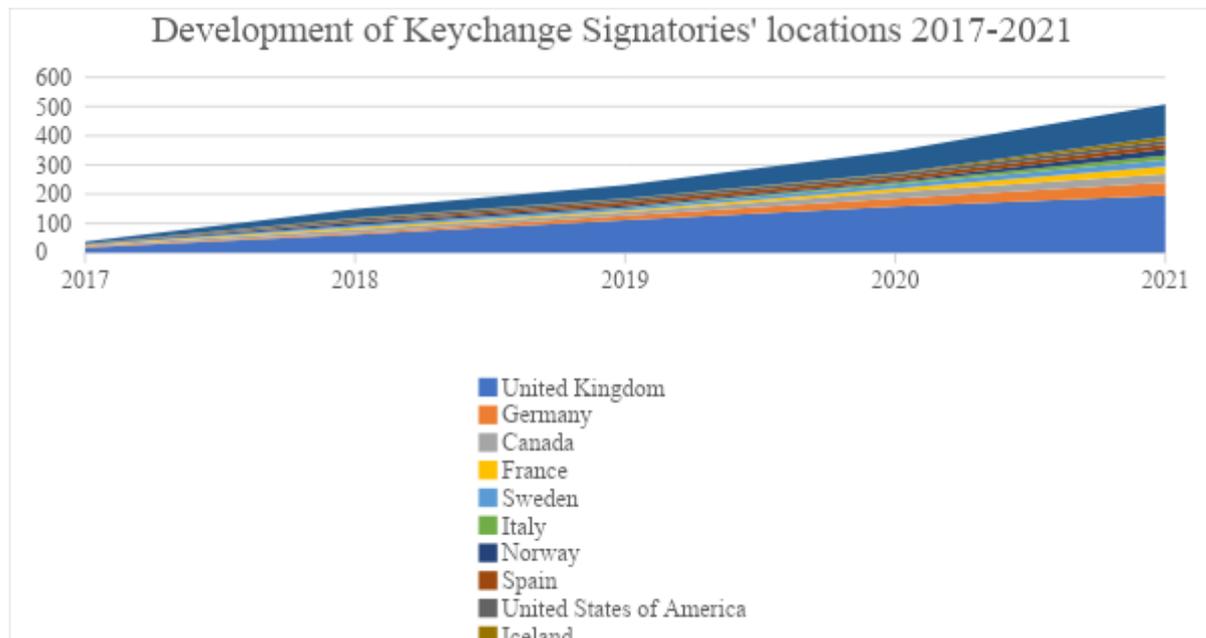


Locations of Signatories

In Figure 2 we show the countries signatories were based in. With 222 out of 613 signatories, the UK has the highest number of signatories within the Keychange Pledge. The UK is followed by Germany with a number of 57 signatories, with Canada below that with 41 signatories. The tag ‘Multiple’ refers to organisations operating in multiple territories.



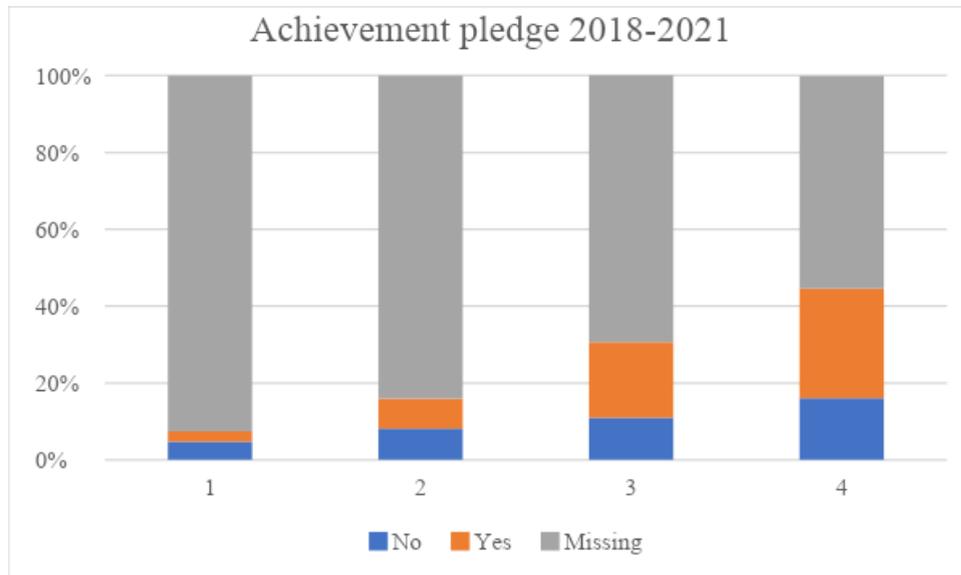
When we look at how this developed from 2017 to 2021 (see Figure 3 below, and Appendix C Table 2 for more details), we again observe that most signatories were based in the UK in all years. Nevertheless, other national contexts, especially Germany, Canada, France and Sweden, are becoming increasingly involved over the years.



>> Achievement pledge - gender

One of the questions asked in the report focused on whether pledge signatories achieved the 50% gender balance target during their reporting period. Of the signatories that provided data, the proportion of signatories that was able to achieve the gender balance target does increase over the years: from 2.7% in 2018 to 28.5% in 2021 (see Appendix C Table 3 and Figure 1). Moreover, the proportion of signatories that was able to reach their goals remains higher than the proportion of signatories that was not able to reach their goals. However, in all years, many signatories did not or could not answer this question (see 'Missing' in Figure 4: from 92.6% (N= 138) in 2018 to 55.3% in 2021 (N=281)).

Figure 4: Proportion of Signatories that Achieved Pledge Goals 2018-2021 (Self-Reported)



Below, we divide the achievement of pledge goals into several categories: Acts, Performers, Panellists and Employees. We show how many signatories rose above the 50% gender balance pledge goals for each category (see Appendix C Table 4 for more details). In the reporting form, signatories received additional information on the counting process and definitions provided by Keychange, which we will provide where relevant below.

Acts

According to the definition provided by Keychange (Keychange, n.d.), this number refers to “acts with at least one underrepresented gender member (member can hold any performance role within the band)”. Signatories that were able to provide data seem to work towards or already achieved their gender balance pledge goals with regard to performing acts. Most signatories have between 26-50% or 51-75% of underrepresented gender acts. While the number of signatories belonging to the first category (26-50%) decreases from 23 signatories in 2017 to 17 in 2021, the number in the second category (51-75%) increases from 7 in 2017 to 37 in 2021.

Performers

The definition provided by Keychange (Keychange, n.d.) lists performers as the “number of underrepresented gender performers on

stage throughout [the] event". Most signatories do not achieve their gender balance pledge goals over the years with regard to performing members. Most signatories have between 26-50% of underrepresented gender performers over all years. Nevertheless, they seem to move towards achieving these goals increasingly as the number of signatories in the category 26-50% increases from 1 in 2018 to 30 in 2021.

Panellists

Signatories seem to move towards achieving their gender balance pledge goals with regard to panellists over the years. Most signatories have between 26-50% or 51-75% of underrepresented gender panellists. While the number of signatories belonging to the first category (26-50%) increases from 9 signatories in 2017 to 19 signatories in 2021, the number in the second category fluctuates over the years.

Employees

Most signatories do not rise above the 50%+ gender balance goals with regard to employees. Over the years, most signatories either have less than 25% or 26-50% of their employees belonging to an underrepresented gender category.

>> Achievement pledge – ethnicity

Below, we divide the achievement of pledge goals in terms of race-ethnicity into several categories: Acts, Performers and Panellists. As this was not an official part of the Keychange framework, monitoring and reporting on race-ethnicity was not mandatory, which likely contributed to the low number of signatories reporting this data. In 2021, for instance, the number of signatories reporting data differs per category, with 42 signatories reporting data with regard to Acts, 34 signatories with regard to Performers and 9 with regard to Panellists. Nevertheless, these initial findings can provide further insights for the future development of Keychange (see Appendix C Table 5 for more details)

Acts

Most signatories do not rise above 50% representation with regard to ethnicity in acts, referring to representation of ethnic minority or

indigenous people within their country. Most signatories either belong to the < 25% category or 26-50% category in all years.

Performers

With regard to ethnicity, most signatories do not rise above 50% representation over the years. Most signatories have below 25% of their performers belonging to a minority ethnicity or indigenous people category within their country. This category increases most from 1 in 2018 to 22 in 2021.

Panellists

With regard to ethnicity, most signatories do not rise above 50% representation over the years. Most signatories either belong to the < 25% category or 26-50% category in all years.

Qualitative Results

>> Pledge goals and diversity

Introduction and short summary

- Below, we describe the way in which signatories discuss their pledge goals and how they relate to a range of diversity categories.
- Signatories mostly focus on the inclusion of women in their pledge goals. Other categories of underrepresented genders in the music industry, such as non-binary persons and transgender persons, are mentioned less often.
- With gender being the primary focus of the pledge, signatories include other categories of diversity in their pledge goals to a much lesser extent, for example race-ethnicity, social class, and (dis)ability.
- Many signatories engage in non-specific language when discussing diversity and their pledge goals, making it difficult to gauge who their goals pertain to and the extent to which they reached those goals.

Pledge goals

Almost 200 signatories mention to mostly focus their efforts on pursuing the 50% gender balance, in varying areas. Six organisations mention more specific goals, ranging from percentages between 33% and 100% (meaning that they would, for example, like to achieve an organisation of only members belonging to underrepresented genders). Even though all organisations described their pledge goals in detail when signing up to Keychange, they did not share their pledge goals via the reporting form, meaning that their pledge goals fall outside the scope of this report. The types of actors signatories focus on can be categorised into seven areas:

1. Programme and bookings: speakers, panels, line-ups, bookings, artists signings, performers, commissions, composers, presenters and hosts;
2. Staff and leadership positions: team, project managers, backstage work and technical staff, interns, freelancers, volunteers, agents;
3. Representatives: boards, committees, councils, jury;
4. Educators: Teachers, workshop leaders, lecturers;
5. Content: course content, materials, publications, playlists, archives, social media;

6. Participants and audiences: students, participants and audiences;
7. Partners: external partners depending on the context and type of organisation.

Besides the pledge goals that pertain to achieving a certain percentage of underrepresented genders, signatories also put in efforts that engage with questions of inclusion more broadly. They for example set-up specific projects with regards to mental health, safe spaces or the gender pay gap (see section on Actions).

Diversity language

A fair share of signatories seem to engage in non-specific language with regard to their diversity work, arguing for example that they want to 'broaden their range' or that they book their acts 'in terms of diversity'. The use of generic language makes it difficult to gauge what these signatories consider to be 'diverse' and does not necessarily suggest a clear strategy. This is not to say that these organisations do not work on their pledge, but that a careful consideration needs to be put into how diversity work can be framed so as to clearly point to and monitor the actual work that is being done. A more explicit understanding and communication of diversity would aid in formulating clear goals and the communication there-of between Keychange signatories and to the public.

Gender Identity

Signatories actively focus on the inclusion of women in varying levels of their organisations (53 signatories mention this as part of their pledge goals). Others also indicate their focus on gender minorities, or gender balance more generally, but do not specify what they mean by that category³. A smaller section of signatories includes a focus on other categories of gender identity, for example specifically including non-binary and transgender persons in their pledge goals (23 organisations).

³ Our analysis shows that we cannot assume that all signatories take 'gender minority' to mean the same as the definition provided by Keychange. As some signatories mentioned in the survey that they were unsure what was meant by 'underrepresented gender', it follows that not all signatories are fully versed in the terminology used by Keychange and may thus use different interpretations of 'gender minority'.

“to female bandleaders in an attempt to increase female representation in our series”

“focus on active recruiting of women candidates for Board of Directors; focus on ensuring gender parity at webinars/panels/conferences”

Other diversity categories

Other categories, including race-ethnicity, social class and (dis)ability are also mentioned, although to a lesser extent. The category mentioned most besides gender is race-ethnicity, where signatories mention to focus on the inclusion of minority ethnicities or indigenous peoples (7 signatories). No signatories mention ability in their pledge goals, although when asked about the actions they engaged in during their pledge period, 2 signatories do mention ability. None mention social class in their pledge goals either, only 1 includes social class when discussing their actions.

“We welcome applications from artists who are currently underrepresented or under-supported within the arts sector (including, but not limited to under-represented Black, Asian and Minority Ethnic backgrounds, LGBTQ+ identities, gender identities, low socioeconomic backgrounds, those with disabilities and/or caring responsibilities).”

Actions

>> Introduction and short summary

- In the section below, we list the types of actions individual signatories have focused on during their reporting period. Signatories focus on seven categories of actions in working towards their pledge goals: 1) monitoring, 2) awareness & visibility - internal, 3) awareness & visibility - public, 4) recruitment strategies 5) plans & policies, 6) programmes & projects and 7) partners & networking.
- The Keychange framework is considered to be especially helpful in providing guidelines and best practices, in that it provides a clear framework to publicly share the pledge and its goals, as well as with regard to finding partners and networking.
- Many signatories mention clear strategies with regard to their pledge goals. However, as many signatories seem to engage in non-specific language when discussing their efforts to make

change. Even though this does not mean that they did not put in place any specific strategies, it makes it unclear how they have been putting in efforts towards furthering their Keychange Pledge exactly.

Monitoring

Monitoring entails the continuous upholding of the pledge throughout work processes, focusing on collecting data and paying extra attention to the Keychange Pledge target at selected points in time (this could range from every two weeks to annually). It can entail monitoring during the booking and programming process but also as part of hiring procedures. This was mentioned by 39 signatories.

"We do regular checks of our lineups at points throughout the booking process now to see if we're on the right track or if we need to adjust our strategy for the next round of artist offers".

"We are now more diligent in asking "Who is missing?" whenever we book a large number of artists, delegates or conference speakers."

Awareness & Visibility – internal

Many signatories mention to be aware of the pledge goals internally (mentioned by around 50 signatories). This includes discussing the pledge goals and gender inequality within the music industry more broadly, being knowledgeable and acquiring knowledge about what steps towards pledge goals could be, as well as increasing a sense of responsibility within the team (for example by appointing a staff member responsible for the pledge).

"The whole team is more aware of the gender imbalance in the music industry".

"If we compare our data from our conference in 2018 to the ones of 2019, we can notice a slight improvement in gender representation: I think this is mainly due to us doing a better job on a feeling more responsible about our role and power in creating change".

Awareness & Visibility – public

Signatories focus on the public visibility of their pledge in two ways 1) publicly sharing their participation and achievements in the Keychange Pledge and 2) publicly sharing and promoting awareness with regard to gender inequality and gender minorities within the music industry (a total of approximately 55 signatories mention this in their actions). For some signatories this also means actively promoting the pledge to organisations, festivals and ambassadors that might be interested. Moreover, it could mean that signatories

share their (annual) results publicly, to show that they are achieving the pledge to their followers.

"It was something we made public so that our partners and our audience were aware of the direction we were taking"

"Our platform aims to give visibility to womxn and non-binary artists"

Recruitment strategies

Some signatories indicate that they adapted the language they used following their Keychange Pledge, for example in job descriptions, or changed the way in which they approached recruitment (around 40 signatories). For instance, by actively reaching out to communities that they aim to involve as part of their pledge goals. In this regard, signatories mention that Keychange offers them inspiration in how to communicate.

"We use neutral language in job descriptions, avoiding masculine connotations, not discouraging candidates of any gender, and ensuring an equal chance for all. We describe our team as collaborative and supportive rather than competitive, minimising sports analogies like "kick-ass performance", instead referring to "adaptable", "resilient" and "committed" environment."

"It has been inspiring to see how Keychange communicates about these difficult topics in an inclusive and politically correct way."

"We have also continued to include the previous positive action statement in all our Open Calls and recruitment and extended the period for submissions. Our Call Outs have resulted in an increase in the diversity of applications. To support this process further, we will in future Call Outs and recruitment offer an advice/drop-in clinic for all applicants and musicians are provided with a choice of formats to submit their application."

Plans and Policies

Some signatories make the pledge an official part of their plans and policies or develop principles (19 signatories). They for example mention social media netiquettes, diversity guidelines or workforce manuals.

"[the pledge] is reflected in our IDEA (Inclusion, Diversity, Equality and Accessibility) Plan"

"published our DEI charter internally and have gender parity targets in place".

Programmes and Projects

Many signatories also aim to strengthen the position of women and gender minorities in the music industry. To do so, they develop specific programmes and projects (44 signatories), especially for people that are early in their careers or provide mental health support and training for staff and board members.

"We developed a whole programme only for women starting in music business"*

"Three of our annual artist development programs are specifically developed to create opportunities for women [...] and Indigenous Australian peoples"

Partners

When looking for (new) partners, signatories look for organisations that are either led by women or ethnically diverse leaders or partners that have similar goals and intentions with regard to (gender) equality (mentioned by 19 signatories). Some look within the Keychange network to find partners.

"Trying to partner with more organisations who are led by females are ethnically diverse leaders"

"Work with commissioning partners who have the same commitments as us in terms of equality".

External challenges

>> Introduction and short summary:

- External barriers to reaching pledge goals are those challenges that are external to the signatory in question and are related to the local, national or international context instead.⁴
- Below, we describe the external barriers signatories experienced in three categories: 1) booking and recruitment, 2) COVID-19 and 3) raising awareness. These challenges, that are external to the signatory in question, stipulate the

⁴ The categorisation between external and internal challenges was derived from Stewart, R., Bey, N., & Boks, C. (2016). Exploration of the barriers to implementing different types of sustainability approaches. *Procedia Cirp*, 48, 22-27.

necessity for an approach that includes all actors in the music industry ecosystem.

>> **Booking and recruitment**

Local and genre-specific diversity

Some signatories experience difficulties in recruitment and booking processes due to the limited gender diversity present in the specific genre or local context they are working in (19 signatories). This is experienced in the case of artists (e.g. composers, graphic designers, visual artists) and workers (e.g. board members, sound- and light engineers, loaders and crane operators)

"Finding female artists from specific genre types- punk, rock and DJs-"

"Huge competition to be on the board from experienced, veteran music industry professionals- many of whom were men- we are a small market and we need to seek out strong female voices, which we have"

Diversity within acts versus individual performers

Signatories experience challenges in reaching their pledge goals in terms of individual performers when comparing the gender diversity of individual performers to the gender diversity within acts: this is due to the sometimes limited number of gender minorities present within bands (7 signatories).

"It was easy to ensure at least 50% of acts had at least one woman, but far more difficult to achieve a 50:50 split across the total number of performers. Many female led acts still have a band made up of majority men".

>> **COVID-19 and subsequent measures**

COVID-19 was challenging to signatories as it was difficult "to do anything at all in this period" (97 signatories mentioned the difficulties of having events cancelled). 73 signatories indicated to not have experienced any impact from COVID-19. Signatories indicated 3 challenges related to achieving their pledge goals: 1) low turnover, 2) adaptations in programming (which affected pledge goals both negatively and positively) and 3) constraints on

underrepresented communities. First, some signatories mentioned that they had more limited possibilities to hire new staff during COVID-19 (mentioned by 4 signatories). Second, adaptations that had to be made to programming because of restrictions during COVID-19 (49 signatories mentioned to have organised alternative events) affected if and how signatories reached their pledge goals, both negatively and positively. For instance, signatories mentioned that development with regard to gender diversity within line-ups was stunted because of roll-overs or that continuous cancellations and adaptations in programming often meant reverting to mainly acts with men. However, some signatories also experienced the adaptations that had to be made as having a positive impact on gender diversity, as it required them to rethink their programming to still achieve the Keychange target. Lastly, signatories noted how the underrepresented communities they were working with were affected by COVID-19 disproportionately (for example due to caring responsibilities), which affected the signatories in trying to reach their Keychange Pledge goals (mentioned by 4 signatories).

“disruptions such as state-mandated travel restrictions and self-isolation laws occasionally required us to contract replacement performers on short notice, and as a proportional representation of the industry pool in our region, these replacement performers were often male”

“The switch to virtual concerts after March meant we had to innovate to achieve the target – including commissioning and producing new virtual video recordings from our choir members, as well as reaching out to other choirs round the world to submit videos they had made of works by women composers. This in fact had a very positive effect on the diversity of styles of women composers’ music we were able to present”

“Women and non-binary folks have found it harder to donate their time to the jury which has impacted our goals”

>> Raising Awareness - external

Raising awareness was experienced as difficult on three levels: 1) artists and performers and 2) participants or consumers, 3) partners, agents and managers (mentioned by around 15 signatories). On all these levels, signatories have found it challenging to convince individuals, groups and organisations they are working with

of the importance of the Keychange Pledge and the associated aim for gender equality in the music industry. Signatories for example experience difficulties in collaborating with partners that do not believe in the pledge's target-based system. A few signatories also experience challenges with regard to the commercial goals present within the music sector, with some bookers for example capitalizing on the need for gender diversity.

"many local artists and especially female artists are not as knowledgeable in regards to gender inequalities in the music scene, therefore one challenge we faced was to get female artists to believe in the cause".

"to build trust and awareness before they [participants] joined the programme".

"Convincing agents and managers that their female artists deserved to be headliners"

"Working with partner organisations who believe it's important, but that it's everyone else's problem"

"Our bookers have said that some female artists are charging more in fees than male artists of the same level which makes us think that agents are trying to capitalize on the need for festivals and promoters to achieve a gender balance"

Internal challenges⁵

>> Introduction and short summary:

- Below we describe the challenges signatories experience within their organisations in three dimensions: 1) political, 2) structural and 3) cultural.
- Political challenges are those challenges that are concerned with the allocation of scarce resources (such as time, money) and competing interests. Signatories experienced two: 1) limited finances and 2) maintaining gender balance while upholding other criteria for booking.
- Structural challenges are related to the way in which an organisation works, for example the design of its units and subunits, the rules as well as the goals and policies. Signatories identified three: 1) monitoring, 2) pre-existing booking and recruitment processes and 3) low turn-over.
- Cultural challenges have to do with norms and beliefs. Signatories identified one main challenge to reaching their pledge goals, that had to do with raising awareness of the pledge goals and its importance within their teams.

Political dimension

Political internal challenges are those challenges that are concerned with the allocation of scarce resources (such as time, money), competing interests, and fights for power and advantage. Signatories identified two: 1) finances (8 signatories) and 2) influence of other criteria (around 20 signatories). First, some signatories mentioned that they did not have any difficulties in finding artists to book, but that they “weren’t able to reach their [artists’] financial needs”. Second, some signatories mentioned finding it difficult to maintain a balance between the 50 % pledge target and other criteria for booking, mostly focusing on quality criteria. For example, a few signatories mentioned that they found it difficult to find groups “led by women with enough quality to fulfill our audience expectations”. On the other hand, some signatories mention this but the other way around in the sense “that we have too many good women... so they become the dominant part”. In

⁵ The categorisation between external and internal challenges was derived from Stewart, R., Bey, N., & Boks, C. (2016). Exploration of the barriers to implementing different types of sustainability approaches. *Procedia Cirp*, 48, 22-27.

this respect, some signatories face challenges as some of them receive backlash on overrepresentation of women in their organisation when publicly sharing their participation in the Keychange Pledge and/or results.

Structural dimension

Internal structural barriers are challenges that have to do with the way in which the organisation works, for example the design of its units and subunits, the rules as well as the goals and policies. Signatories identified three structural challenges: 1) monitoring, 2) pre-existing booking and recruitment strategies and 3) low turn-over.

>> Monitoring

Data gathering is experienced as challenging by a few signatories (5 signatories). Even though only a few signatories mention this, the high numbers of missing data (see quantitative results) also suggest that signatories experience difficulties in gathering data. This may for example be due to not knowing the appropriate metric, how to work with application forms or asking about specific categories of identification. With regard to the latter, some questions that ask about categories of identification are forbidden by law in certain contexts (e.g. France). Moreover, the categories that Keychange applies may be different to priorities put forward by funding organisations. Keychange could provide further guidance in this respect, especially since some signatories mention that communication between their organisation and Keychange in this regard has been found lacking.

“Difficult to know how to calculate record label activities- we meet target in terms of acts signed to the label by following the guidance for festivals – ie acts with at least one woman member, but not individual members – guidance around the most appropriate metric to apply would be helpful”

“We have not identified a good, respectful and non-invasive way to ask for one’s gender identity”

>> Booking and recruitment processes

There are some challenges with regard to booking and recruitment processes that signatories mention (53 signatories). This for

example has to do with some organisations working with applications, less availability of scores and recordings for women, and dealing with cancellations.

"Accessing sample scores and recordings by women- there are still more of these by men available. Also trying to find works that fit particular parameters (forces, duration, themes, etc)".

"The difficulty is that we'll have a discussion around the table, create a perfectly balanced line-up of panelists, then this person is not available, and the other needs to cancel, etc. And we have an end result of a very white, very male line-up of speakers. We need to keep this in mind, not just in the initial stages, but as replacements need to be found"

"We have found there is a greater likelihood of female speakers cancelling (for a broad range of reasons) or not participating unless a fee is paid (beyond expenses) for what is usually a platform to promote themselves or their work."

>> Low Turn-over

Some signatories run into the issue that there are not a lot of opportunities to hire new members of staff because of the low turn-over (mentioned by around 5 signatories). Relatedly, management teams consisting of all men were questioning the extent to which they would have to 'give up' their own positions in the organisation to reach pledge goals.

"Low turnover of personnel not creating vacancies"

"Board Governance rules - no rotation during this period"

Cultural dimension

The cultural dimension includes challenges that can arise from norms and beliefs. Signatories identified one main challenge: raising awareness within their teams.

Raising Awareness - internal

Some signatories experienced difficulties in making sure their teams were thinking along the same lines, i.e. that they were upholding similar cultural values (mentioned by around 4 signatories). Those organisations that do not experience any issues in reaching their

pledge goals mention that this has to do with their organisations' cultural values.

"ensuring all staff were thinking along these [pledge] targets when booking artists"

"pretty easy because it is baked into our culture of our organization values".

Value of the Keychange Framework

Short summary

- Many signatories see being part of Keychange as a continuation of the work they were doing already.
- Still, the Keychange framework is deemed impactful in three ways: 1) accountability and credibility 2) targeting and framing and 3) networks and solidarity.

Accountability and credibility

Many signatories argue that the Keychange framework is impactful for them, even if they were already working towards similar goals before signing the pledge, as it gives them a heightened sense of responsibility and being part of the Keychange Pledge holds them accountable to their pledge goals (53 signatories). Being part of the Keychange framework also adds to signatories' public credibility in reaching their gender balance goals.

"We now have no option but to book responsibly in relation to gender. It removes any space for flexibility."

"We use the Keychange Pledge now as a way of life in every aspect of the company whether it be events, recruitment, training."

Targeting and framing

Keychange signatories mention that the Keychange framework is useful to them as it helps them to progress towards a specific goal (around 30 signatories). Moreover, some signatories mention that the framework is useful to pitch and secure funding for projects including underrepresented communities.

"We now have a specific target, and we now are much more openly celebratory about the achievement... representation is a key part of the programming process. Our programming policy openly states our ambitions for our artists to represent the current population and to set positive role models."

"Our core values already have weight of equality and minority gender representation, but this pledge will make our further and future steps more dedicated and well-formulated gestures."

"We are confident in saying that our involvement with Keychange, which is a part of our wider audience development and equality agenda, has been an important part of securing various funding streams. As we continue to improve representation across our staff and program we can tell more compelling stories to funders and open more opportunities for funding"

Networks and solidarity

Signatories argue that the network that Keychange provides is helpful to them: not only does it give a sense of solidarity and shared purpose, it also provides a way to find partners within the music industry that share similar goals (around 30 signatories, also see Actions: partners). Signatories mention that artists, speakers, performers, professionals, audiences and funders alike reacted positively to their involvement in Keychange, thereby effectively extending their networks.

"As the phrase "unity is strength" says, having an endorsement as Keychange pledge, has given an authentic support to our work and to our allies."

"The Keychange Pledge has foregrounded the need for institutional change and provided a useful framework for advancing that end."

Appendix A: References

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Appendix B: Survey Questions

- Name of organisation
- Where is your organisation/festival based?
- Year that you are reporting on (MC: 2017, 2018, 2019, 2020, 2021, 2022, 2023, NP)
- Please share the exact pledge(s) that you made when joining Keychange?
- Was your activity affected by COVID-19 in this year? (if so, please specify how- eg. Festival edition was unable to take place in 2020)
- What type of organisation are you? (1. Festival/live event series (select this option if your festival also includes a conference), 2) conference, 3) company/organisation (e.g. agency, management, broadcaster, concert hall, education, distributor, non-profit, promoter, orchestras and ensembles, venues, studios, record label, publisher, collection society, media)
- How many speakers were on your programme in total?
- How many women or gender minority speakers were present on your programme in total?
- State the total number of acts that performed at your festival/events (in the year you are reporting on)
- Number of acts with at least one underrepresented gender member (member can hold any performance role within the band)
- Number of acts with at least one member belonging to a minority ethnicity and/or indigenous peoples
- Please list the total number of performers that appeared on stage throughout your event(s) (individuals)

- Total number of underrepresented gender performers on stage throughout event(s) (individuals)
- Total number of individual performers belonging to minority ethnicities and indigenous peoples on stage throughout event(s)
- Total number of underrepresented gender performers belonging to minority ethnicities and indigenous peoples (individuals)
- Did your event sell out/reach maximum attendance in the reporting period? (yes/no/don't know)
- How many speakers belonging to minority ethnicities and indigenous peoples appeared on your programme in total?
- How many underrepresented gender speakers belonging to minority ethnicities and indigenous peoples appeared on your program?
- What steps have you taken to implement your Keychange Pledge(s)?
- How has the Keychange Pledge influenced your booking or recruitment strategies?
- Has the Keychange Pledge influenced other areas of your work?
- What feedback have you received on your participation with the Keychange Pledge from your audience, performers, staff or partners?
- Has your involvement in Keychange had a positive effect publicly?
- Do you think your involvement in Keychange had a positive financial impact on your activities?
- Have you shared details of your pledge publicly with your audience, partners and/or collaborators? (yes/no/don't know)
- What's the capacity/reach of your event or organisation? (under 200, under 800, over 800, over 2000, over 5000, over 15000, over 40000, don't know, other, namely...)
- Has your capacity/reach changed in the last 12 months, if so, how?
- Did you achieve the 50% Keychange Pledge gender balance target in this reporting period?
- How difficult was it to achieve your 50% target? (1 easy- 10 difficult)
- What was the most challenging part of achieving your 50% target?
- Do you have any feedback or tips that you'd share with fellow organisations trying to achieve gender balance within their set-up?
- Has your event/activity been affected by legislative changes regarding gender equality? (yes/no/don't know)
- If you answered yes, how?
- Was gender equality a factor when it came to you applying for/receiving financial support? (yes/no/don't know)
- Do you collect data on your audiences?

- What percentage of your audience identified as an underrepresented gender?
- Has this increased since you signed the pledge or since you last reported to us?
- How many employees actively worked in your organisation during this reporting period?
- What percentage of your workforce identified as an underrepresented gender during this reporting period?
- How many tickets did you sell in the reporting period?
- Have you got any quotes supporting the success of your festival/ organisation- especially referring to gender equality or the quality of your programming?

Appendix C: Additional Tables and Figures

Table 1: Development of Keychange signatory organisation types categories 2017-2021 in percentages

		Year				
		2017	2018	2019	2020	2021
Type	Agency and Management	0%	0,7%	1,7%	8,1%	8,5%
	Association	0%	1%	3%	6,6%	8,9%
	Concert Hall/Venue	0%	0%	5,2%	6,9%	6,7%
	Conference	8,1%	8,7%	5,2%	3,5%	3,3%
	Conservatoire	0%	0,7%	2,6%	2%	1,4%
	Festival/Event	91,9%	85,9%	66,2%	49,3%	42,5%
	Orchestras & Ensembles	0%	0,7%	7,8%	8,1%	6,3%
	Record Label	0%	0%	4,3%	4%	3,9%
	Other	0%	2,3%	4%	11,5%	18,5%
	Total	100%	100%	100%	100%	100%

Table 2: Development of Keychange Signatories' Locations 2017-2021 in percentages

		Year				
		2017	2018	2019	2020	2021
Country	United Kingdom	43,2%	40,9%	48,1%	45,5%	38,4%
	Germany	10,8%	4%	6,5%	7,8%	9,1%
	Canada	16,2%	8,1%	5,6%	6,6%	5,7%
	France	2,7%	4%	2,2%	3,5%	5,1%
	Sweden	0%	5,4%	3,9%	4%	4,3%
	Italy	0%	0,7%	0,4%	1,7%	3%
	Norway	2,7%	5,4%	3%	1,7%	4,5%
	Spain	2,7%	2,7%	4,8%	3,5%	3%
	United States of America	2,7%	6%	4,8%	3,5%	2,8%
	Iceland	2,7%	1,3%	0,4%	0,9%	2,8%
	Other	16,3%	21,5%	20,3%	21,3%	21,3%
	Total	100%	100%	100%	100%	100%

Table 3: Achievement pledge by year, missing values excluded

	2018	2019	2020	2021
No	63,6% (7)	51,4% (19)	35,8% (38)	36,1% (82)
Yes	36,4% (4)	48,6% (18)	64,2% (68)	63,9% (145)
Total	100% (11)	100% (37)	100% (106)	100% (227)

Figure 1: Proportion of Signatories that achieved pledge goals 2018-2021, missing values excluded



Table 4: Number of signatories rising above gender balance pledge goals per category

		Year							
		2017	2018	2019	2020	2021	2022	Total	
Acts and Gender	<25%	2	5	2	2	2	0	13	
	26-50%	23	60	24	15	17	11	150	
	51-75%	7	26	26	21	37	16	133	
	75% >	0	5	4	5	16	5	35	
Panellists and Gender	< 25%	0	4	0	0	0	2	6	

	26-50%	9	33	14	9	19	7	91
	51-75%	5	12	8	7	11	4	47
	75% >	0	1	3	1	4	0	9
Performers and Gender	< 25%		2	4	5	8	1	20
	26-50%		1	11	16	30	12	70
	51-75%		0	1	4	8	7	20
	75% >		0	0	3	3	0	6
Employees and Gender	< 25%			2	3	6	2	13
	26-50%			2	8	11	4	25
	51-75%			0	0	9	1	10
	75% >			0	6	6	4	16

Table 5: Number of signatories rising above 50% in terms of ethnicity per category

		Year						
		2017	2018	2019	2020	2021	2022	Total
Acts and Ethnicity	<25%		4	17	18	19	13	71
	26-50%		0	1	8	15	7	31
	51-75%		0	1	2	5	3	11
	75%>		0	0	1	3	2	6
Panellists and Ethnicity	< 25%	2	6	2	10	7		27
	26-50%	0	1	3	6	1		11
	51-75%	1	0	0	1	0		2
	75% >	0	0	0	1	1		2
Performers and Ethnicity	< 25%		1	9	15	22	10	57
	26-50%		0	3	6	7	6	22
	51-75%		0	0	2	0	2	4
	75% >		0	0	1	5	3	9