

Keychange Manifesto 2.0

2024



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Creative Europe Programme
of the European Union



“While individual empowerment is key, only collective action can effectively generate the lasting institutional transformation required for social change.”

Patricia Hill Collins

About Keychange

Keychange is a global network and movement working towards a total restructure of the music industry in reaching full gender equality. Keychange consists of three core partners across three countries: PRS Foundation (UK), Reeperbahn Festival (DE) and Musikcentrum Öst (SE). In addition to the three core partners Keychange has a strong support network of partners from across 12 countries working proactively to achieve change, complemented by Keychange U.S. which brings more focus on the U.S. music scene.

The core activities of Keychange are focused around a participant programme and a global Keychange Pledge to increase gender diversity within the music industry. The participant programme in Europe and Canada supports an annual intake of an average 74 artists and industry professionals (innovators) from across 12 countries, who are chosen through a rigorous, intersectional and inclusive process to reflect our values. Through our festival partners all participants receive support to perform or speak at one of our partner festivals, in addition to receiving mentorship through our partnership with shesaid.so. Throughout the year we also run Manifesto sessions and creative workshops or labs to develop an environment of creative and critical thinking whose aim is to further the horizons and freedoms within the industry. The recently launched Keychange U.S. talent development programme supports a further 25-30 participants per year.

The Keychange Pledge is our invitation to music organisations, companies and any entities working within the music industry to commit publicly to achieving a wider, more equitable, inclusive and intersectional representation in the music industry. Our actions and aims are steeped in our belief that a better world is possible, through a better music industry.

Keychange is led by Reeperbahn Festival (Germany) PRS Foundation (UK), and Musikcentrum Öst (Sweden) supported by the Creative Europe programme of the European Union, in partnership with BIME, Breakout West, Different Sounds (Inne Brzmienia), FACTOR, Iceland Airwaves, Ireland Music Week, Linecheck, Liverpool Sound City, MaMA, Mutek, Oslo World, SACEM, Socan Foundation, Tallinn Music Week, and Way Out West. Keychange U.S. is supported by founding sponsors TuneCore and Believe.

We are grateful to the many sponsors who have made Keychange possible.

Keychange Team

Christina Hazboun, Marie Fol, Lea Karwoth, Mia Ternström, Aysha Hussain, Patrick Daniel, Ragnar Berthling and Joe Frankland

Introduction

Since our initial inception in 2017 Keychange has seen a wonderful array of artists and innovators with over 300 participants joining our programme and sharing their music, works, knowledge and insights. Working together with 13 festivals across 12 countries in Europe and Canada, we have lived through many impactful moments all rooted in our belief of bringing more women and gender-diverse artists and professionals into the spotlight.

Throughout those years we have been running Manifesto sessions, where our participants had the chance to share their wishes, concerns, experiences and recommendations to drive the industry forward. This served as the basis for the first Manifesto presented in 2018 which called for collective action and related to challenges in four core areas: Working conditions and a lack of senior role models; Investment; Research; and Education. Since then we have been listening and noting down everyone's thoughts and recommendations which we have now congregated in one document that we are calling "The Keychange Manifesto 2.0". The Manifesto serves as a temporal stamp of where the industry stands and where its future needs to head.

While the Manifesto recommendations and demands cover a vast array of areas, some areas have not been given enough attention due to the evolving nature of the music industry. The challenges of Artificial Intelligence and the representation of trans and non-binary artists and professionals are two points that have not been raised enough. Yet it is paramount that we keep them in mind as we move towards a more diverse and inclusive music industry. As the general focus of the Manifesto was around gender-diversity in the music industry, the environment and ecology do not figure prominently within the testimonies of the participants when bringing all data together, yet the health of our planet is unquestionably a matter of grave importance and we need to think how to reduce our carbon footprint as an industry.

Harassment, bullying and discrimination are rife throughout the industry, as many reports attest, yet digging deeper into these topics requires safer spaces and environments to allow for the development of serious mechanisms to tackle them regionally and globally. The most quoted demand by artists and professionals has been to create and maintain safer spaces. This is a clear indication of what troubles many persons working within this field.

With a multitude of key actors in the ecosystem, from artists to venues, labels to press, cultural organisations to governments and legislators we all complete the pieces of this musical puzzle and have the power of agency, and a duty to enact change towards a better musical ecosystem. Hence we all have an equal responsibility to work together and unite our forces in pushing through the challenges that stand between us and a more diverse and equitable world.

Methodology

Manifesto notes were collated in two ways:

1. Handwritten notes, which were taken by Manifesto facilitators over the years 2020–2023. Those notes had summaries of conversations and main points.
2. Manifesto notes were taken based on topics: What is going well, What can be done better, What ideas and opportunities there are, and what recommendations participants would have.

Not all Manifesto notes were collated in a uniform manner, therefore data was collated through topics that emerged from the verbatim. The verbatim were coded and analysed via a bottom-up approach, creating categories based on an analysis of each individual data point and grouping them in categories that meaningfully represent a complete sample of responses.

The data available is from across 14 festivals, conferences and network meetings from across 12 countries with an average of 5 participants in each session, bringing the estimated respondents to 180. The data is based on anonymous verbatim provided during the Manifesto sessions.



2018

2024



registered women
songwriters on average¹



Between 17%-22%[^] of songwriters
registered with collection
societies are women

^{*}Based on collection society data available in Keychange partner countries Norway, Sweden, France and the UK

2018

Gender Pay Gap

2024



Female— 30%+— male Gender pay
gap at major music companies
in the UK²



Between 20%-37.5% Gender pay
gap at major music companies
in the UK³

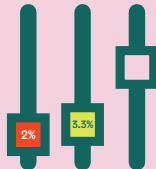
2018

Producers

2024

2%

Female producers across
600 most popular songs⁴



3.3%

Women producers across
900 most popular songs⁵

¹ Average registered female composers/songwriters at Keychange partner country collecting societies

² Music Business Worldwide compiled 2018 stats from music organisations in the UK with more than 250 employees

³ As per gender pay gap reporting from major music companies in the UK (mean gender pay gap at Universal, Sony, Warner, Live Nation, Ticketmaster, AMG, AEG).

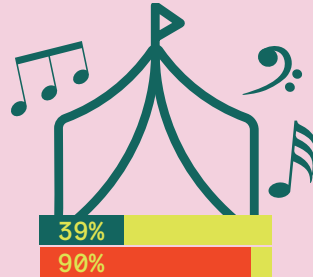
⁴ Annenberg Inclusion Initiative 2018 report "Inclusion in the Recording Studios" analysing 600 songs between 2012-2017

⁵ USC Annenberg Inclusion Initiative 2024 report "Inclusion in the Recording Studios" analysing 900 popular songs in 2012, 2015 and 2017-2023.



35%

Of artists featured on top charting tracks were women⁶



39%

of acts from 235 festivals were female or female fronted

90%

of headliners across Europe's top music festivals were men⁷

Keychange Pledge

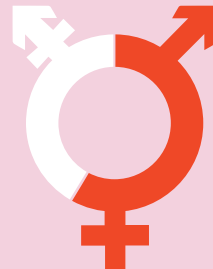
2018

2024



40%

of acts performing at reporting Pledge signatory festivals, events and venues had underrepresented gender member



57%

of acts performing at reporting Pledge signatory festivals, events and venues had underrepresented gender member

⁶ Ibid, analysing 2023 Billboard Hot 100 tracks.
⁷ IQ-Mag European Festival report 2023.

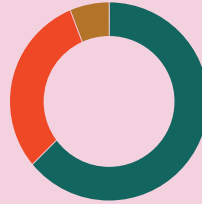
2018

2024



70% men
30% women

Gender divide in music industry workforce⁸



64% men
32% women
6% Gender-diverse

Gender divide in music industry workforce⁹

Classical works performed at concerts written by women*

2018

2024

2.3%

Classical works performed at concerts written by women¹⁰

5%¹¹



⁸ womeninmusic.org

⁹ Be The Change Report 2024

¹⁰ Donne Women in Music research of 3,524 works from 1,445 concerts worldwide 2018-19.

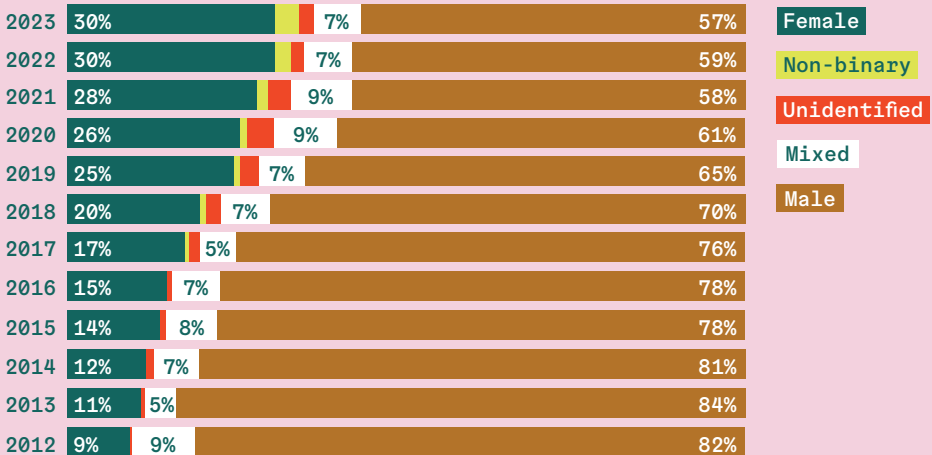
¹¹ Donne Women in Music research of 14,747 compositions scheduled by 100 orchestras in 27 countries throughout their 2020-21 seasons.

Percentage of women across Senior Executive roles in the Music Industry

(USC Annenberg Inclusion Initiative)



Gender proportions of festival acts over time



Gender proportions of female and non-binary acts have been slowly but surely on the rise.¹²

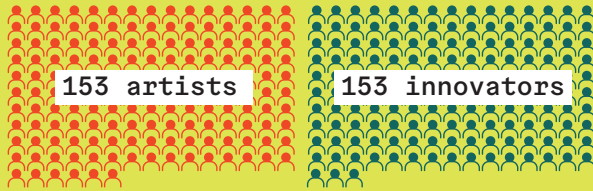
NB: Please note that access to data included in this Manifesto is based on reports, data and statistics available in English which often focus on UK and US markets.

¹² FACTs 2024 report from Female Pressure.

Keychange Achievements

Participants (2018-2024)

306 Participants



5 Cohorts

(Phase 1, 2020-21,
2022, 2023, US 2023-24)

155

Showcase
performances
of artists



160+

Speaking/moderating
opportunities for
innovators



Average of 9.000 euro
investment in each
participant¹³

*of which average of 2.250 euro as direct
travel bursary including access and
childcare top-ups when needed

Mentorship

194 Mentorship pairs

the majority of which are
managed through our
partnership with SheSaid.So's
'We Grow' programme



¹³ of which average of 2.250 euro as direct travel bursary including access and childcare top-ups when needed

Manifesto

29 Manifesto sessions
run from 2020 to 2023



Opportunities

42 Creative Labs made of:



25

Networking
events



130

Workshops &
speed-meetings



83

Panels &
keynotes

(UP TO FEB 2024)

Pledge

2018

45 festivals
worldwide
signed the
Keychange
pledge



2024

over 650
signatories
working in any
area of music
from 40+
countries signed
the Keychange
Pledge

Core Manifesto Aspirations

Running through our findings and our participant testimonies has been a thread of **five core aspirations** which should form the nucleus of our actions within the music industry to improve both gender and intersectional diversity.

Better Working Conditions:

Our sector is characterised by atypical working patterns, irregular income and fewer possibilities for social mobility, with a higher risk of underpaid or unpaid work that is only amplified by power imbalances in the sector. Public bodies, as well as large music industry companies (including streaming companies) need to invest in the resilience of smaller actors in our industry, provide more funding, targeting gender-diversity and intersectionality, with clear benchmarks and criteria, fairer streaming revenues, equal pay and financial stability for the freelance, small-scale community in the music industry.

Care:

Our practices need to be anchored in the politics of care and self-care for artists, professionals and decision-makers. Care includes the recognition of our abilities and limits within both mental health and physical health, in addition to making space and time to care for our offspring, environment, surroundings and those who may require dedicated attention.

Education:

There is a need to increase the education around gender-diversity and intersectionality amongst artists, music industry professionals (for the live and non-live sectors), legislators and policy makers. This relates to disseminating information around gender-diversity through various media and events, but also informing key-actors of language and terminology surrounding diversity.

Intersectional Representation:

The representation of women and gender-diverse people from different backgrounds and abilities in the music industry needs to increase in proportion to what is prevalent in society. This relates to artists and professionals from different racial backgrounds (non-white), trans and non-binary artists and professionals, and people from different ages, abilities and socio-economic backgrounds. Persons from these backgrounds are especially underrepresented in leadership positions. The colonial histories of many European countries should be taken into account.

Safer Spaces:


We have a right to a safe workplace. We need safer spaces for all genders. For everyone to feel safe, we need venues, festivals, promoters, recording studios, media and everyone within any field related to the music industry to take action and create safer spaces with clear mechanisms for addressing bullying, harassment, violence and discrimination to both protect but also prevent any harm.

Manifesto 2.0

While reading this Manifesto please imagine a better future for our humankind and our planet. The learnings and recommendations are meant to be deeply absorbed, processed and implemented. The recommendations and action points are targeted at legislators, policy makers and the music industry at large, including its live, recording, publishing, sync and broadcasting sectors.

1. We Need Safer Spaces

In a world where misogyny, sexism, bullying, harassment, racism, ageism, ableism, colourism and other forms of discrimination are still issues for our societies to tackle, we, as women and gender-diverse artists and innovators, demand safer spaces. Those should manifest through the creation of clear guidelines on what safety is, educating staff and future generations on safety measures and providing resources on how to create and maintain safer spaces. As artists and innovators from the music industry we would like to see inclusive approaches and we request that the following steps are implemented:





-  **ACTION** All: Develop and mandate safer space training programmes for staff and subcontractors.
-  **ACTION** European and national legislators: Introduce comprehensive safer space legislation and establish legal frameworks for addressing instances of Bullying, Harassment, and Discrimination (BHD).
-  **ACTION** Policy- and decision-makers: Allocate funding for safer space initiatives.
-  **ACTION** Music organisations and companies: Develop and communicate clear policies and procedures for addressing BHD incidents and actively promote gender diversity in leadership.

2. Tackle the Gender Pay Gap

As artists and music industry professionals we feel the urge to unite and work together across the board to fight the gender pay gap and hence fight poverty. The socio-economic repercussions of working within the music industry are complex, with 72% of UK music professionals being freelancers and 31.7% of EU-27 cultural and creative workers being self-employed (compared with 14% for the economy as a whole), with fewer social protection and financial stability.

The median gender pay gap is reported to be at 24.3% between male and female-identifying artists and professionals within the industry (compared with 12.7% for the economy as a whole in the EU-27). While the gap has been steadily diminishing and more efforts have been made to reduce it, let us all push together to completely rid our system of any pay biases skewed towards a certain gender. Adopting measures such as universal pay, the establishment of music unions and official bodies to protect the rights of musicians, music industry professionals and freelancers are paramount in achieving a more equitable industry.

To achieve this, we recommend that the following to be implemented:


- ACTION**  All: Require funding bodies, advisory panels, and boards to increase the intersectional diversity of their members.
- ACTION**  National legislators: Enact legislation mandating gender pay equity across the music industry following the EU Pay Transparency Directive and encourage SMEs to implement monitoring of pay equity.
- ACTION**  Policy- and decision-makers: Implement policies that require cultural funding allocations to be aligned with principles of gender equity, diversity, and inclusion, similarly to what is being implemented by the Creative Europe Programme.
- ACTION**  Music organisations and companies: Integrate social provisions in contracts with artists and freelancers, including medical assistance, holidays, menstrual and menopausal leave, and parental leave, especially for those under a certain income threshold.

3. Intersectional Representation

When talking about representation we have the visibility and audibility of different genders and artists from different racial, ethnic, cultural, socio-economic and ability backgrounds in mind.

Despite the increase of organisations working on gender diversity, there is still a persistent feeling amongst artists and professionals that not enough has been done to address the male-dominated, white, heteronormative nature of music industry structures. Participants have called on governments, organisations, institutions and all parts of the music industry to play a more active role in adopting clear policies and measures that openly tackle representation, diversity, equity and intersectionality.

The underheard, underrepresented, marginalised and silenced are certainly present in plain sight. When considering elements of race, national or ethnic origin, colour, religion, age, sex, sexual orientation, gender identity or expression, marital status, family status, genetic characteristics, disability or age, those are all matters that intersect and should be taken into consideration within the music industry to achieve a diversity that is truly representative of our planet. The number of trans-gender persons, parents, differently abled bodies and people from different racial, age and economic backgrounds is still very low in the whole music ecosystem. This needs to change and their representation needs to increase, through the following suggestions:

- ACTION**  Policy-makers: Establish Intersectional Representation Policies with clear benchmarks/quotas to achieve true and wide-scale gender diversity in lineups, workplaces, and the entire music ecosystem, ensuring representation from diverse age, gender, ethnic, and economic backgrounds while preserving local and cultural diversity.

ACTION

Funding bodies: Encourage funding bodies to require organisations and actors to pledge to achieve diversity and inclusion goals as a condition of receiving funding, and monitor the implementation of those goals. This unified call to action, endorsed by culture ministers, can create momentum for change and incentivise stakeholders to prioritise efforts to increase representation of underrepresented groups in the music industry.

ACTION

Music organisations and companies: Implement strategies to increase the intake and retention of women and gender-diverse people into technical roles within the music industry and increase the number of female and gender-diverse headliners.

4. Education in the Music Industries

Education in this setting includes education at all levels, whether at schools, universities, or through professional training and courses provided to musicians and music industry professionals. One of the cornerstones of music knowledge is education and we believe that the seeds of musical knowledge should be planted at an early age, through the education system. Despite there being musicology courses at universities, much of the knowledge in the music industry is acquired through practice and therefore there is a need to create more resources around how different fields within the music industry operate, how the finances within it work, and how gender diversity, equity, inclusion and accessibility can fit within this whole mosaic that is much needed for the advancement of the music industry. Furthermore, institutional staff need to receive more training on gender diversity, the language that accompanies it and new approaches to intersectional diversity to keep abreast of developments within society.

We request that:

ACTION

Policies: Allocate increased funding for education programmes with a specific focus on gender diversity, equity, inclusion, and accessibility (DEIA) within the music industry.

ACTION

Legislation: Advocate for legislation that mandates the establishment of gender diversity and equity music resource centres at a national level. These centres would serve as hubs for knowledge dissemination, mentorship programmes, and resources related to gender diversity and equity within the music industry, ensuring widespread access to information and support.

ACTION

Funding bodies: Support Inclusive Education Initiatives and allocate funding specifically for gender equity programmes, workshops, and initiatives at music schools, festivals, and music organisations.





ACTION

Music organisations and companies: Partner with key stakeholders to tailor workshops and training programmes, especially focusing on leadership and music production, for women and gender-diverse individuals in the music industry.

5. Visibility and Awareness



Gender is a thing of the past, present and the future. It is an important aspect of our lives. It is important that the music industry ecosystem widely embraces the conversation around gender diversity, acknowledges its various manifestations and propels them to platforms of visibility through booking, curation, recruitment, and programming (including radio, TV, playlists, magazines, blogs, etc.).

Starting from ourselves, our family, friends and colleagues, we need to increase awareness of gender diversity. We demand the following:

- ACTION**  National policy-makers: Encourage public and private music industry stakeholders to conduct more debates around gender equity and diversity, providing platforms for discussions on pressing issues and potential solutions.
- ACTION**  European and national policy-makers: Provide tools/framework/systems to companies, organisations, funding bodies, and festivals to collect, collate and share more data, reports, and learnings on gender diversity, for instance within an observatory for the European music ecosystem. This data should include information on gender representation in leadership positions, pay equity, and diversity initiatives, helping to identify gaps and track progress towards gender equality in the music industry.
- ACTION**  Funding bodies: Allocate funding for the development and implementation of targeted campaigns around gender-diversity and equity, with a focus on intersectionality.
- ACTION**  Music organisations and companies: Adopt gender-diversity in their bookings, curation, and programming decisions, amplifying the presence and visibility of women and gender-diverse individuals in the music industry.

6. Community and Networking

There is strength in numbers and comfort in togetherness. We are driven by similar goals and aims and have a great desire to collaborate and be connected. The creation, fostering and nurturing of spaces of connection is therefore an important step to nourish our need for thoughtful exchanges around how we can work collectively to achieve gender diversity, safety, inclusion and other goals. In order to attain that, we call for the creation of European, but also global syndicates that connect us all. To expand and fortify our communities we are calling for:

- ACTION**  All: Encourage collaboration and connectivity transnationally among diverse actors, particularly focusing on diversity-driven initiatives to foster a sense of community and peer-to-peer support.
- ACTION**  Funding bodies:
 - o Provide funding and resources to develop, maintain and connect inclusive network directories ensuring accessibility and visibility for all participants.

- Support the creation of physical and virtual spaces for networking and collaboration within the music industry.
- Support the organisation of smaller summits focused on discussing and implementing actions for gender diversity, safety, and inclusion, providing opportunities for meaningful dialogue and collective action.

ACTION



Music organisations and companies: Prioritise accessibility in networking events by breaking down barriers and making them accessible to people from different gender, racial, disability, and economic backgrounds.

7. Implement Politics of Care

Within the fast-paced cycles of the music industry, it is inevitable to suffer from burnout, stress and other maladies and difficulties related to the often extractive and high-demand practices expected from artists and professionals. The politics of care should therefore constitute an integral part of our work practices and attentiveness to different abilities and needs means that we can achieve the equity we seek. Care includes a wide range of care for the mental and physical wellbeing of artists, children and people with disability, and the environment.

We therefore call for:

ACTION



All: Support the normalisation of accessibility riders in the music industry, requiring venues and event organisers to provide accessibility provisions as a standard practice.

ACTION



National legislators: Introduce legal frameworks that mandate equal and paid parental leave for all genders within the music industry. This legislation should ensure that parents and carers have access to flexible working hours and support with associated costs.

ACTION



Funding bodies: Allocate funding to support schemes aimed at providing mental health support, accessibility provisions, and childcare services for music industry workers. Funding bodies should prioritise initiatives that promote the well-being of artists and professionals, recognizing the importance of mental and physical care within the industry.

ACTION





Music organisations and companies: Incorporate elements of care within work ethics to reduce competitiveness and alleviate stress.


8. Research and Knowledge


Research and knowledge enable us to understand better what we have, the challenges we are facing and determine potential solutions for them. Very few research based reports take gender-diversity and intersectionality into consideration. It is also necessary to look at accessibility and care needs within the music industry to forecast areas of improvement and change. Developing a collective language, with somewhat unified data collection methods will enable easier comparisons of data sets across borders.

Therefore we need:

ACTION  All: Require researchers to include gender-diverse stakeholders in the research and knowledge production processes, ensuring diverse perspectives are represented and fostering a more inclusive research environment.


ACTION  European and national policy-makers: Advocate for (government) policies that allocate funding to research initiatives focused on gender-diversity, intersectionality, and career development within the music industry.

ACTION  Funding bodies: Allocate increased and sustained funding for research projects that focus on gender-diversity, different socio-economic backgrounds, neurodiversity, and other abilities within the music industry.

ACTION  Music organisations and companies: Take part in survey and data collection initiatives and promote free access to research data.


9. Work Alongside Cis-Men

Every other report and conversation around the music industry reiterates the fact that cis-men are in the lead and control access to most fields within the music world. If we want the music industry to become more equitable, cis-men need to engage in the conversations and processes that women and gender-diverse artists are having. Cis-men who are allies need to be more engaged in cross-gender conversations and collaborations and we should all work collaboratively to find solutions for the current struggle. We therefore acknowledge the need to:

ACTION  Policy-makers: Encourage and instigate cross-gender conversations including men, women and gender-diverse individuals on gender equality in the music industry.


ACTION  Music organisations and companies:


- Develop specialised talks, workshops, and training programmes aimed at cis-men in leadership positions within the music industry to understand and challenge power dynamics.
- Encourage cis-men throughout the industry to take responsibility for addressing the industry's gender problem and be more proactive.
- Recognise efforts of allies in promoting inclusivity, diversity, and equity, and highlight their concrete contributions to advancing gender parity.


ACTION  Funding bodies: Encourage and support collaborative initiatives that bring together men, women, and gender-diverse individuals in different formats to work towards gender equality in the music industry.

10. Language and Communication

Language being the main tool to convey meanings and understandings of this world, we need to utilise language in a gender-affirming and intersectional manner. While languages differ across Europe, there are demands for working on databases and terminology resources to help increase understanding and messaging around gender and intersectionality. We therefore need to heed the following advice:

ACTION  Policy-makers: Advocate for the implementation of policies that promote the use of gender-affirming and intersectional language in all official communications and documents within organisations and institutions. This policy should include guidelines for inclusive language usage and provide resources for training and education on the topic. Additional provisions for creating multilingual terminology databases and providing translation and interpretation services to ensure accessibility for all individuals should be considered.

ACTION  Funding bodies: Allocate funding to support initiatives aimed at increasing awareness and understanding of gender-inclusive and intersectional language.

ACTION  Music organisations and companies: Implement inclusive language training into the professional development programmes offered. This training should be mandatory for all staff members and stakeholders involved in communication and public outreach efforts. Additionally, organisations should establish guidelines for using gender-affirming and intersectional language in their communications and events.

Acknowledgements

We would like to thank all of the artists, innovators and partners who have contributed their thoughts, words, spaces, resources and time to help make this Manifesto possible.

Terminology:

(Dis)ability:

“The socially constructed system of norms which categorises 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).

Gender-diverse:

“refers to the extent to which a person’s gender identity, role, or expression differs from the cultural norms prescribed for people of a particular sex” (Kidkarndee, 2018).

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).

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