May 2022

Towards a more diverse and inclusive independent music sector

Report on IMPALA's first survey

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Introduction

In May 2021, during European Diversity Month, IMPALA launched the first diversity and inclusion survey for the European independent music sector. IMPALA designed the surveys with its equity, diversity and inclusion task force and input from Keith Harris OBE as adviser, as well as in consultation with national associations.

The aim of the exercise was twofold. First, to map best practices, local developments and projects regarding diversity and inclusion. Second, to start building a basic picture of the sector's diversity and key issues faced. It was not intended to be a detailed workforce survey of the type carried out by UK Music, for example. Instead, it was directed at businesses and associations, with the aim of getting a snapshot of the sector through a cross section of respondents of different shapes and sizes from different countries.

Due to restrictions about collecting data in some countries in Europe, we needed to design the survey so that respondents were asked to make their own assessment, rather than give specific details. Another challenge we came across is the differences between European territories. It was important to acknowledge in the survey itself, that we appreciate all territories are different and there is no one size fits all. All answers were submitted anonymously, and it was made clear that the data wouldn't be used for any profiling or other purposes. Our data policy was communicated and made available **here**.

We issued two versions of the survey - one for businesses and a separate one for associations. Once they were published, national association members of IMPALA were invited to respond, as well as direct company members. Associations were also asked to invite their members to participate. As mentioned above, the aim was to get a cross section of replies rather than comprehensive coverage.

Feedback from the sector after the initial round was that the survey should be shorter, and that complex questions should be simpler. This was also driven by the fact that the sector was suffering from survey fatigue and had to deal with the impact of the Covid pandemic. A second, and much simpler, version for businesses was issued in November 2021 around a set of ten questions which the task force saw as core. IMPALA closed all surveys in March 2022.

OVERVIEW OF RESPONDENTS

Responses and countries

In all, 125 responses were submitted covering 22 different countries. Among the businesses responding were 112 companies of different sizes and countries, and at varying stages as regards issues of diversity, equity and inclusion. This was accompanied by 13 association responses, also with varying approaches.

Although not intended to be a detailed map of the sector, the results provide a useful snapshot of the range of issues the sector faces, where it is at the moment and what is needed in the future. Having said that, it is likely that those who are most active on these issues will have completed the survey, so the results won't necessarily be reflective of the whole sector. When looking at the results, this should be borne in mind.

Profile of the respondents

Nearly 75% of respondents to the short business survey have between 0 and 10 employees. For the longer survey, over 80% of respondents have between 0 and 10 employees. Only the long survey had responses from very big companies (more than 50 employees). Both surveys had responses from businesses in the middle categories.

For the long business survey, 18% of respondents have between 21 and 50 employees, and 2% have more than 50 employees. In the short survey, 25% of respondents said they have between 21 and 51 employees.

A significant number of business respondents said they worked with freelancers (87,5% of respondents to the long business survey and 85% of respondents to the the short survey).

For associations, all respondents except one had 5 or fewer employees. Most work with freelancers, only 3 associations don't.

Lack of resources to address diversity and inclusion issues

Many respondents said that they couldn't allocate enough resources to this topic. They needed to focus on their daily business and many businesses flagged that they have one or no employees at all, questioning their capacity to take action on diversity and inclusion issues.

Outcome

These surveys were a first attempt to get input. Our association members told us that the participation rate was good in the circumstances. We have useful indications across a cross section of the sector, taking into account the variety of respondents. The results are summarised below. Please bear in mind that this is a small sample of the sector. As flagged above, the intention was to get a range of responses providing a snapshot rather than attempt to provide key figures for the whole sector. We follow up with some conclusions and recommendations, including how we believe this data should be collected in the future.

SURVEY SCOPE AND RESULTS

We wanted to find out where members sit on diversity and inclusion issues generally. Do they have specific diversity and inclusion policies or are they planning to do so? Are they taking measures as employers to be more inclusive? Are these issues a priority? Are they planning any new initiatives? What challenges do they face? Are they interested in training? Do they support relevant projects and campaigns? What support is available at national level? How are they doing in terms of their diversity goals? How do they rate themselves in terms of their own diversity?

The survey was constructed around the protected characteristics set out in the European Charter of Fundamental Rights and elaborated on specific issues. We covered neurodiversity as well as economic and social factors, on top of the areas traditionally covered such as gender, LGBTQ+, race/ethnicity, disabilities etc. We included non-binary persons when asking about gender and we also asked respondents to include transgender people identifying as men and women when asking about binary gender representation.

DIVERSITY AND INCLUSION POLICIES

Of those who participated, 38% of businesses who replied and 46% of association respondents have a diversity policy in place. These policies address categories such as gender, age, race/ethnicity, LGBTQ+, disability, all of these. Some respondents noted they feel they are diverse and inclusive in practice without the need for a written policy.

Out of those not having a diversity and inclusion policy, nearly one fifth of businesses and one third of associations planned to introduce new diversity and inclusion initiatives in the next 12 months.

For businesses not intending to introduce a diversity and inclusion policy, some stated they don’t believe they have issues to solve (36.36%), they don’t see it as priority (36,36%), or their goals are already achieved (18,18%), others don’t know where to start (18,18%,) while some have no time or resources (9%). With nearly two thirds of associations either already having a policy in place or intending to in the next 12 months, the others cited various reasons for not planning to in the next year. This includes the question of priorities (20%), lack of time and resources (20%) and some associations reported not having issues to solve (just over 20% of respondents).

DIVERSITY MEASURES IN BUSINESSES

Here are measures applied by businesses who replied to the short survey (from the most applied to the least applied):

- **Flexible and/or home working - 69%**
- **Work with diverse artists - 60%**
- **Support diversity related initiatives in the music sector - 32%**
- **Diversity and inclusion policy or charter - 27%**
- **Job adverts promote equality and diversity - 27%**
- **Speak out on diversity related issues and/or encourage your government to act - 20%**
- **Reasonable adjustments for employees with disabilities or health conditions - 18%**
- **Changed how recruitment is done - 16%**
- **Shared parental leave - 16%**
- **Outreach with local associations or other structures working in the community - 13%**
- **Encourage offline and/or online media to boost diversity or market access - 13%**
- **Someone responsible for implementing the policy - 11%**
- **Employee training on diversity/conscious inclusion - 11%**
- **Mentoring possibilities - 11%**
- **Produce guidance for employees - 9%**
- **Changed how employees are promoted - 7%**
- **Appoint diversity advocate(s) to board or elsewhere - 7%**
- **Changed how salaries are reviewed - 7%**
- **Carry out exit interviews - 7%**
- **Pay monitoring based on gender - 4%**
- **Collecting/monitoring data - 4%**
- **Employee retention initiatives - 2%**
- **Practice reverse mentoring - 2%**
- **Pay monitoring based on race/ethnicity - 2%**
- **Other - 2%**

Similar results showed in the long survey for businesses.

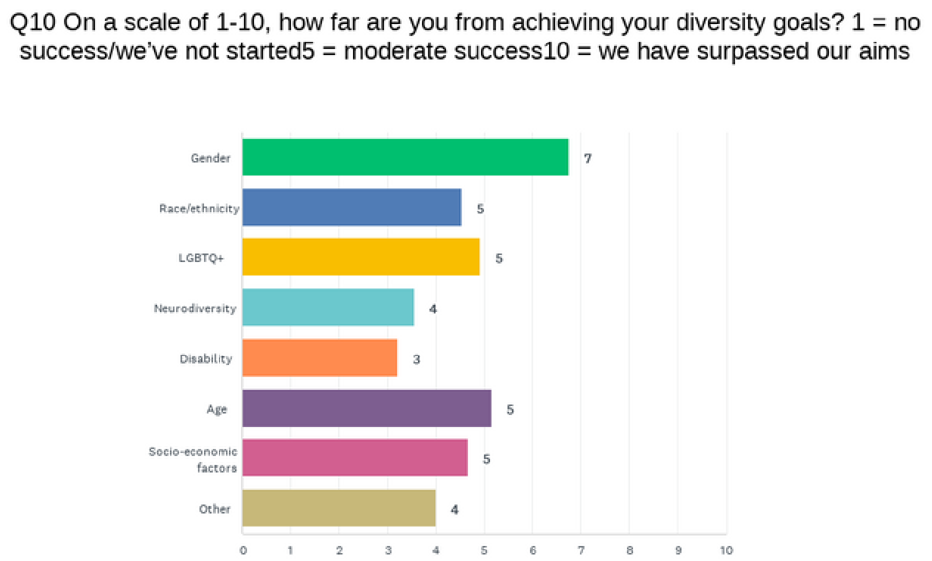
Note: In a previous question we also asked businesses if they had a diversity and inclusion policy, charter or guiding principles and 38% of them said yes. In the question of diversity measures currently applied in businesses, we have 27% of respondents who said that they are currently applying a diversity and inclusion policy or charter. This difference may be due to the difference in the number of responses we got for each question.

AREAS FOR IMPROVEMENT

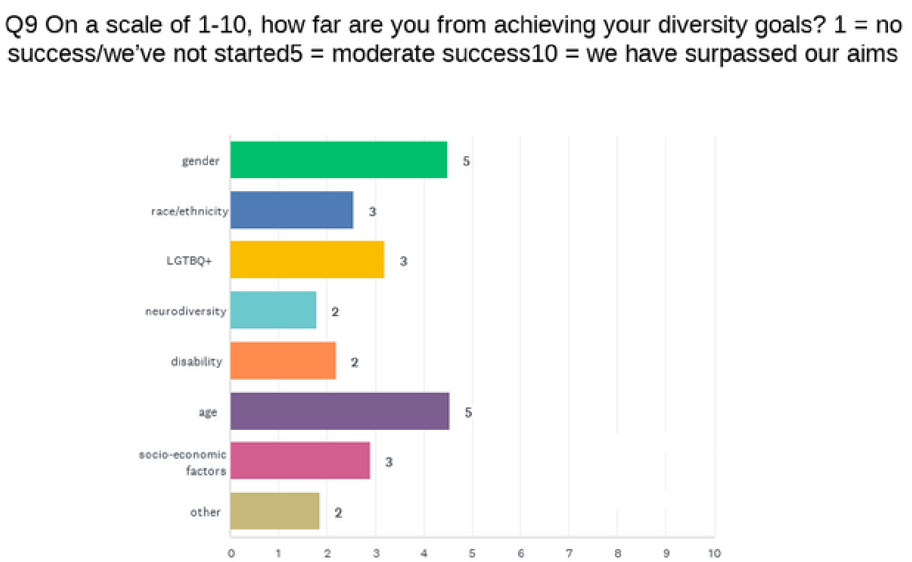
What do businesses who took our surveys identify as areas where they need most work?
According to answers received, for music businesses the top two areas that need most work are:

- Ethnicity/race (more than 40%)
- Socio-economic factors (nearly 40%)

How businesses rate themselves on achieving their diversity goals:



How associations rate themselves on achieving their diversity goals:



What do associations who took the survey identify as areas where they need most work?

For associations, the top two areas are:

- Gender (more than 80% of respondents put gender as the greatest challenge of their territory)
- Race/ethnicity (more than 40% of respondents put race/ethnicity as the greatest challenge of their territory)

WHAT MEMBERS NEED HELP WITH

We asked which kind of help members needed. For businesses, information on EU funding represents more than 60% of answers received, and more than 50% of them asked for help in applying for EU funds. For associations, more than 50% asked for information on EU funding.

IMPALA'S WORK

When it comes to the level of implementation of IMPALA's diversity and inclusion charter or guidance for members within associations, 84% of respondents selected at least one option. The options selected most often were sharing best practices with other associations or members, and also supporting diversity related initiatives in the music sector (both selected by 63,64% of respondents).

AREAS OF GREATEST CHALLENGE

FOR BUSINESSES

The issues raised by businesses as being the most challenging are:

Race/ethnicity - 42%
Gender - 40%
Socio economic factors - 30%
Disability - 24%
LGTBQI+ - 18%
Age groups - 18%
Others - 15%

FOR ASSOCIATIONS

The issues flagged by associations as the greatest challenges in their territory, were put in a slightly different order or priority, with some issues raised by businesses not flagged as a challenge:

Gender - 83,33%
Race/ ethnicity - 41,67%
Age - 25%
LGBTQ - 16,67%

FUNDING

Most of the business respondents are micro and small, with also some medium and larger companies. Some of them indicated they could be interested in working on diversity and inclusion, but they lack resources or time to do it. The findings for businesses show that:

- more than 95% of respondents didn't receive any national or European fund for diversity initiatives
- nearly 40% of respondents don't intend to apply
- more than 25% don't know if funds are available
- one respondent had managed to secure funding

For associations, financial help seems to be more available, at least based on the experience of those who participated in the survey:

- **15% of the respondents had already received national and/ or EU funding**
- more than 45% of the respondents answered that governments or other national bodies provide help for diversity initiatives but nearly 40% of them don't know
- intention to potentially apply in the future is higher than in the answers from businesses, as more than 45% of respondents from the associations might apply to national funds for diversity related projects
- regarding EU funds, half of the associations who answered said they no intention to apply, and nearly 40% might apply

It seems clear from the responses that more resources and funding opportunities, as well as support accessing them, will help the sector's businesses and associations address diversity and inclusion issues.

TRAINING

53,85% of association respondents and 20% of company respondents already took part in IMPALA's diversity and inclusion training. 8% of company respondents and 15,38% of association respondents answered that they'll join the training programme in the next 12 months. One respondent in each survey organises its own training.

Note that during the survey exercise, IMPALA hosted two training sessions for members at the time: January 2021 and September 2021.

Music businesses tend to rely on IMPALA to provide guidance and training on diversity and inclusion. They also noted that as this is provided on a European level, content is limited in terms of local market specificities.

EXAMPLES OF RELEVANT SURVEYS AND REPORTS SUBMITTED

National surveys and reports that were flagged in the survey include:

UK Music Diversity Report 2020
Diversity Roadmap
Musikbranschens kompetens och utveckling 2020-2025
Egalité et diversité
Frauen und Männer im Kulturmarkt: Bericht zur wirtschaftlichen und sozialen Lage

Member associations reported that the areas covered by national surveys are:

- **Gender** (66,67%)
- **All** (33%) (**gender, race/ethnicity, LGBTQ+, neurodiversity, disability, age, socio-economic factors**)

Member businesses reported that the areas covered by national surveys are:

- **Gender** (90,91%)
- **Race/ethnicity** (72,73%)
- **LGBTQ+** (36,36%)
- **Age** (27,27%)
- **All** (27,27%) (**gender, race/ethnicity, LGTBQ+, neurodiversity, disability, age, socio-economic factors**)
- **Disability** (18,18%)
- **Neurodiversity** (9,09%)
- **Socio economic factors** (9,09%)
- **Other** (9,09%)

Based on responses, associations appear to be more aware of diversity initiatives, surveys and public funding than businesses.

SUPPORTING RELEVANT INITIATIVES

69% of association respondents and 46.34% of business respondents answered that they support projects or campaigns that promote diversity.
Within associations, that includes the categories of Gender (100.00%), Race/ethnicity (66.67%), LGBTQ+ (55.56%), Neurodiversity (22.22%), Disability (11.11%), Age (33.33%), Socio-economic factors (44.44%), while with businesses they cover Gender (57,14%), Race/ethnicity (57,14%), LGBTQ+ (42,86%), Socio-economic factors (7,14%).

Some of the initiatives provided by respondents as examples are:

besea.n

Music Women* Germany

Protocole contre le harcèlement sexiste et les violences sexuelles

Aide aux projets en faveur de l'égalité femmes-hommes

Kunst & Kultur i Balance

In addition, 53,85% of associations who responded have initiatives in place to boost diversity within their membership or their board.

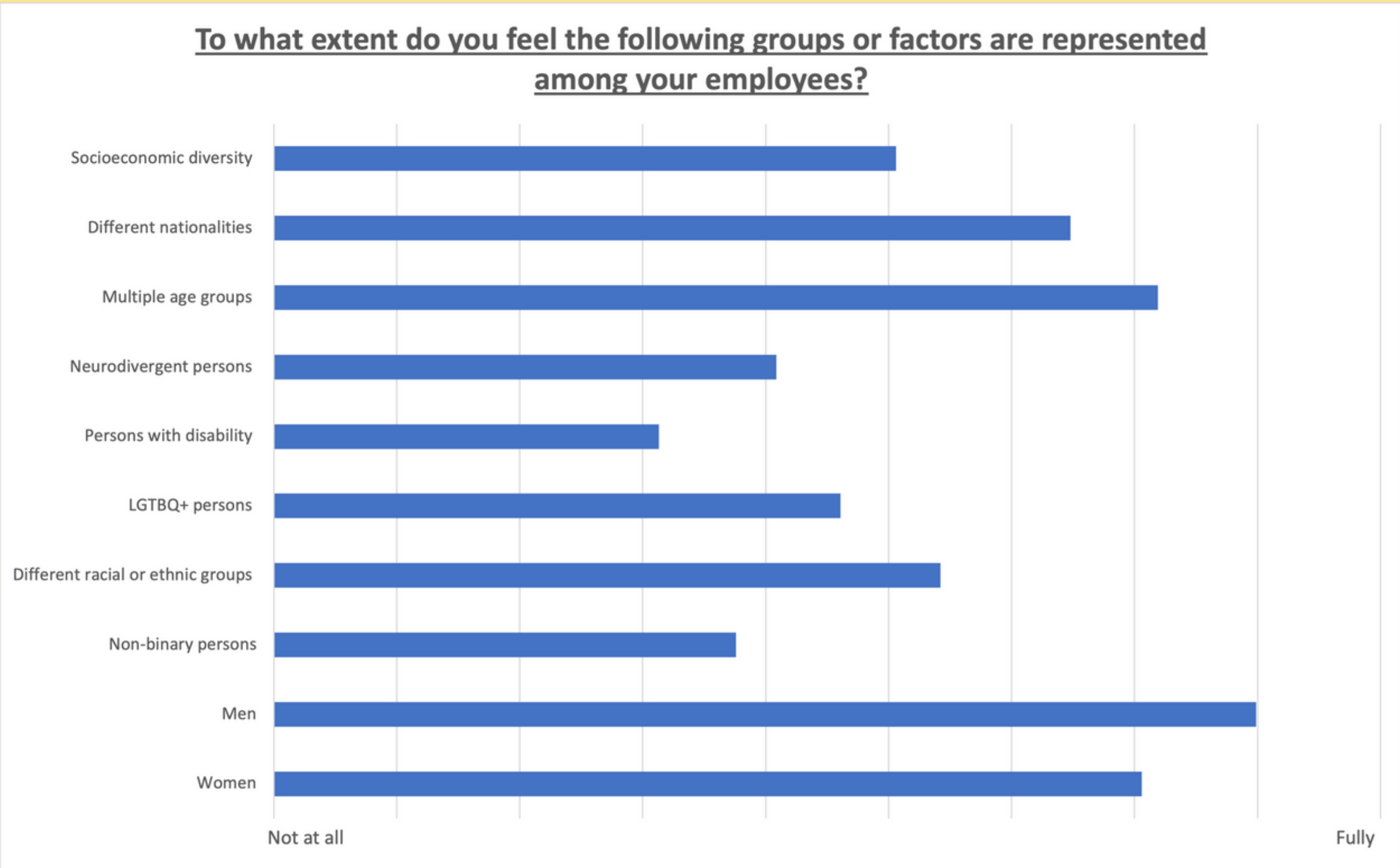
GUIDANCE FOR MEMBERS

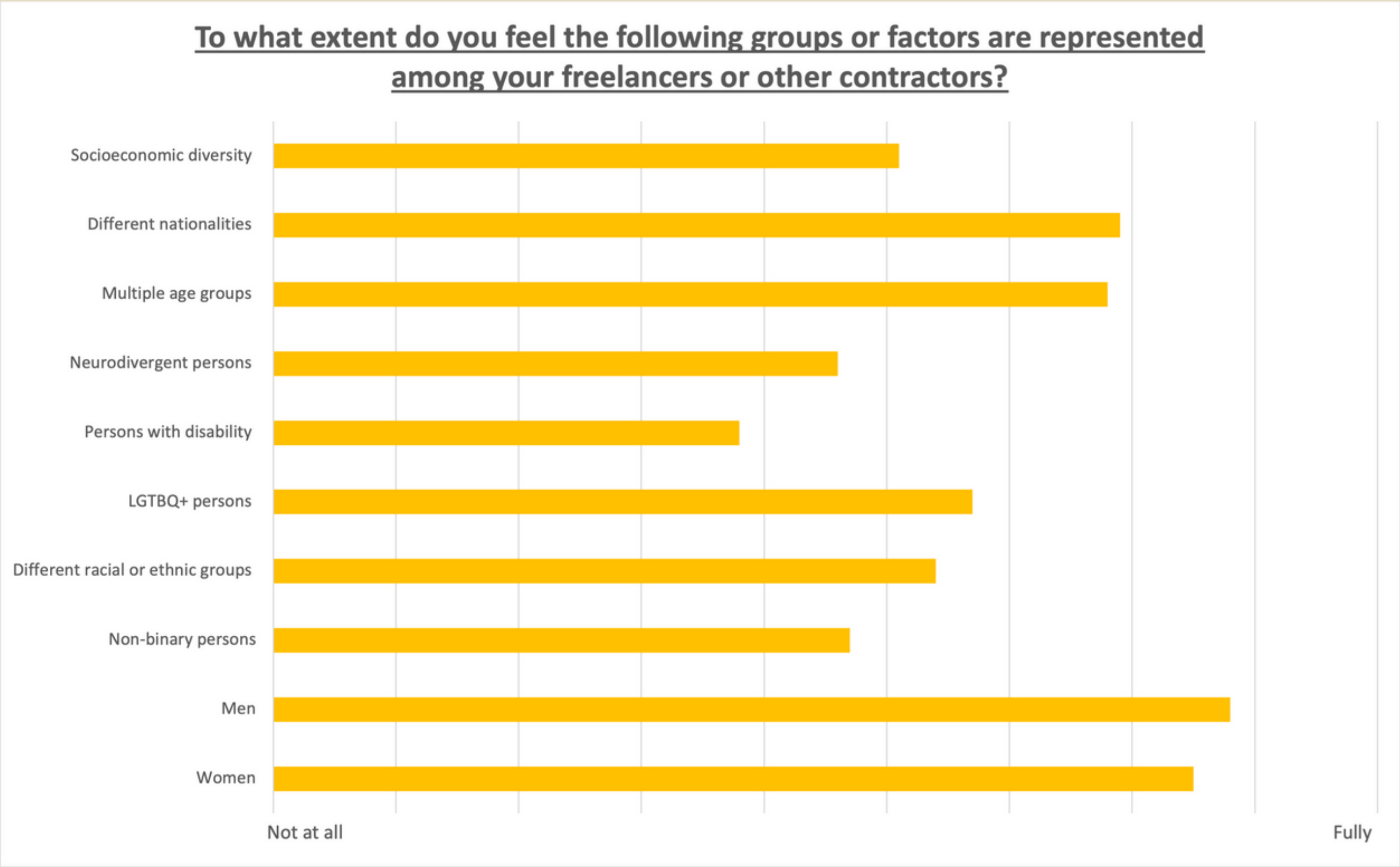
30.77% of the associations who replied make guidance available for their members. The ones who have guidance cover gender (100%), race/ ethnicity (100%), disability (33,33%), age (33,33%), socio-economic factors (33,33%). They are mostly unsure whether their members apply the guidance or estimate the rate of application up to 10%. Some of the associations that didn't have guidance in place were planning to introduce it in the next 12 months (33,33%). This new guidance would cover gender (33,33%) race/ ethnicity (33,33%) disability (33,33%), all criteria indicated (gender, race/ ethnicity, LGBTQ+, neurodiversity, disability, age, socio-economic factors). The ones who didn't plan to make practical guidance available stated no time or resource (16,67%) as the reason, not seen as priority (33,33%) or other (66,67%). IMPALA's guidance for all members is available here.

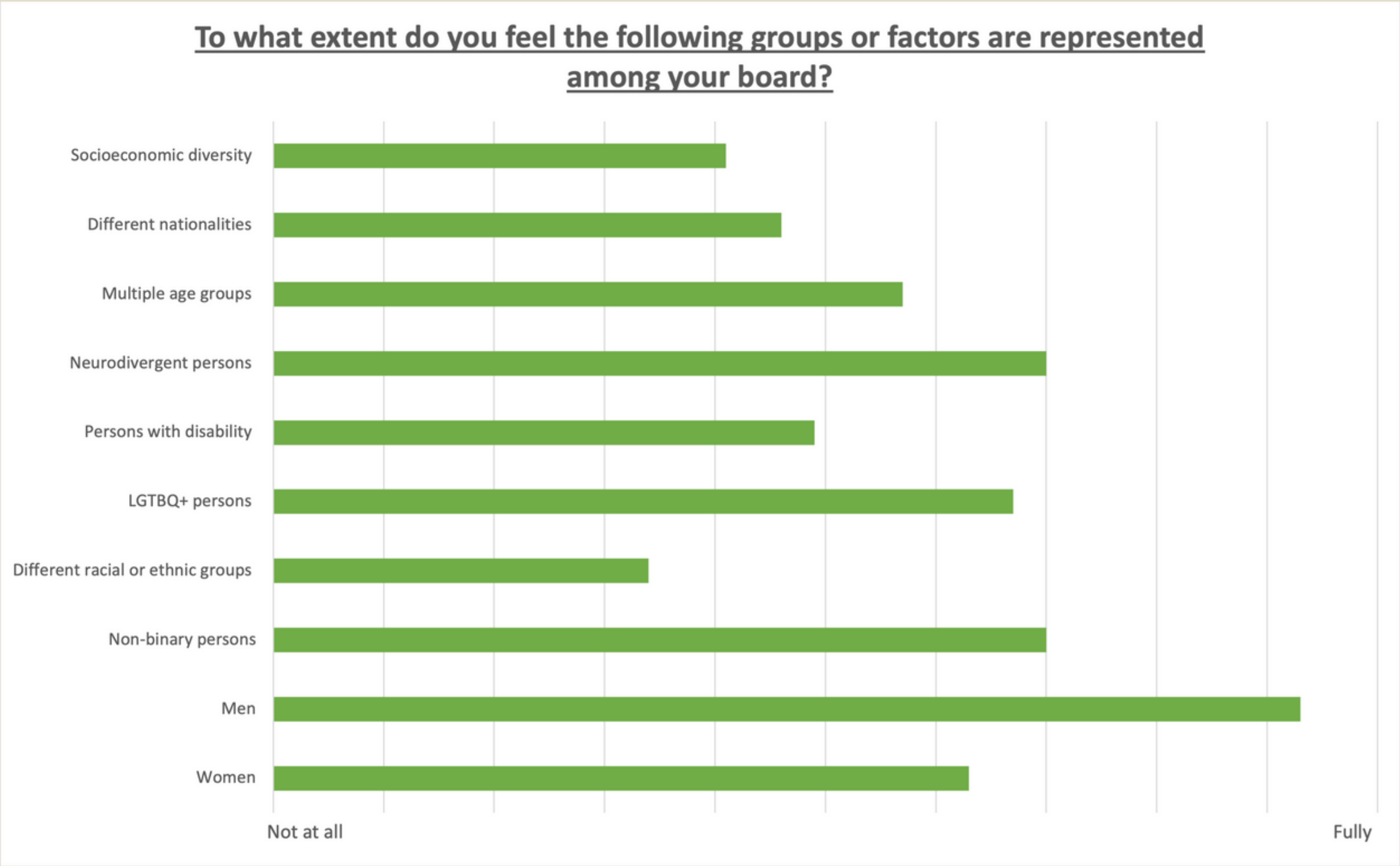
HOW RESPONDENTS ASSESSED THEIR OWN DIVERSITY

In the following graphs, you will see a self-assessment of the diversity in businesses and associations who replied to the surveys. Please note that we applied two different ways of measuring diversity, and at this moment we can only provide average estimates, due to the methodology, scope and various restrictions on collecting this data across Europe.

BUSINESSES
How businesses perceive their own situation as regards their employees, freelancers and boards



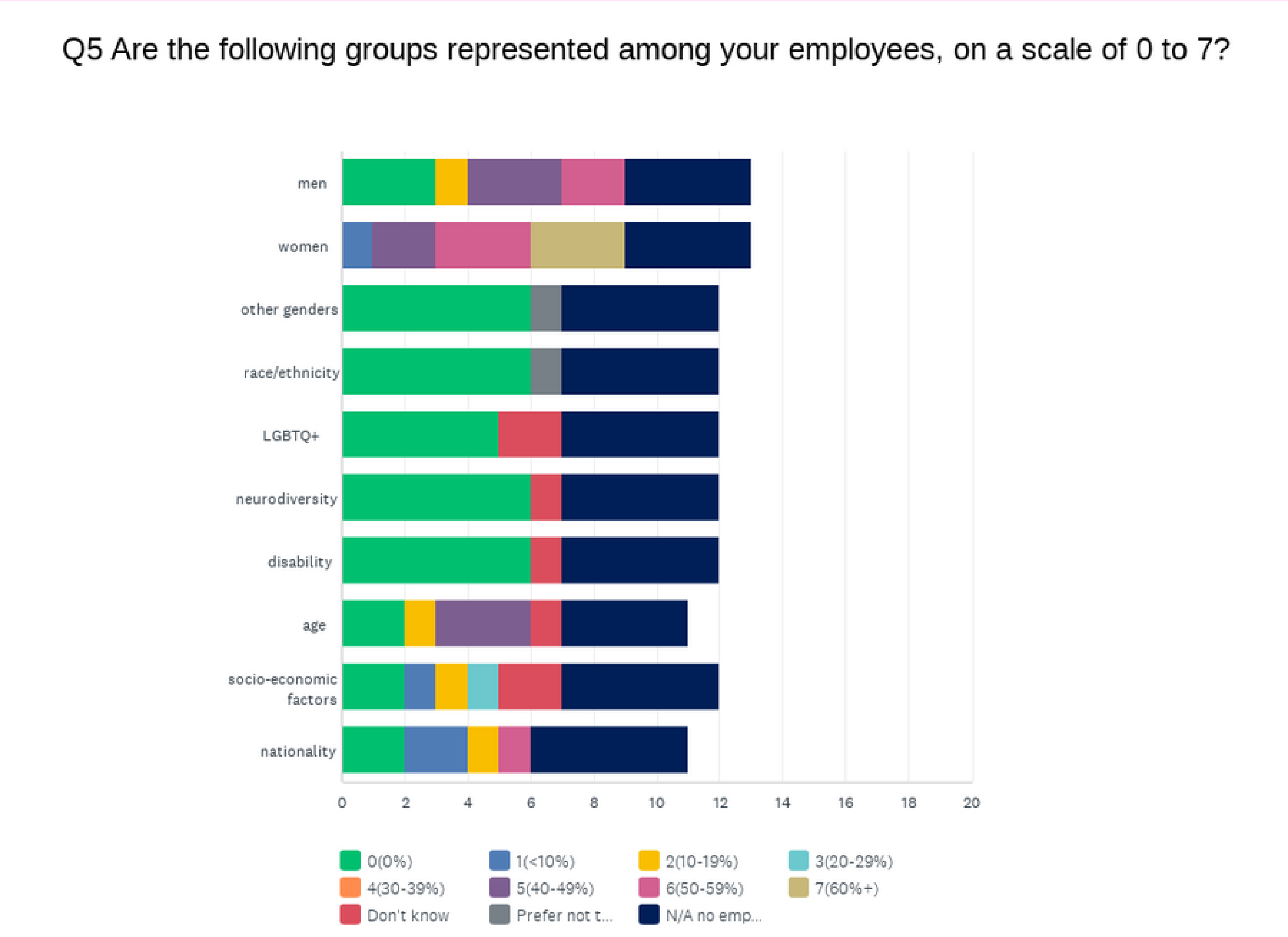

To what extent do you feel the following groups or factors are represented among your freelancers or other contractors?
Socioeconomic diversity
Different nationalities
Multiple age groups
Neurodivergent persons
Persons with disability
LGTBQ+ persons
Different racial or ethnic groups
Non-binary persons
Men
Women
Not at all
Fully


To what extent do you feel the following groups or factors are represented among your board?
Socioeconomic diversity
Different nationalities
Multiple age groups
Neurodivergent persons
Persons with disability
LGTBQ+ persons
Different racial or ethnic groups
Non-binary persons
Men
Women
Not at all
Fully

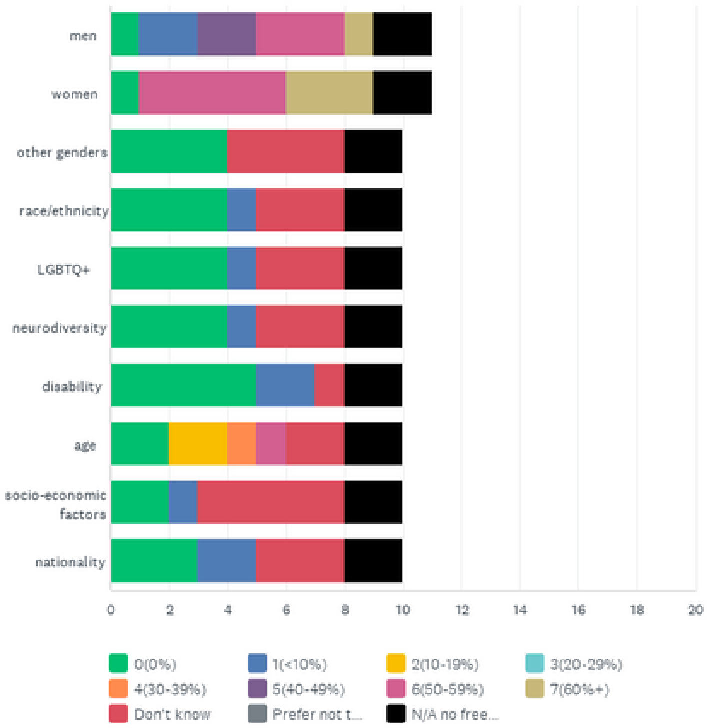
ASSOCIATIONS

How associations perceive their own situation regarding employees, freelancers and boards

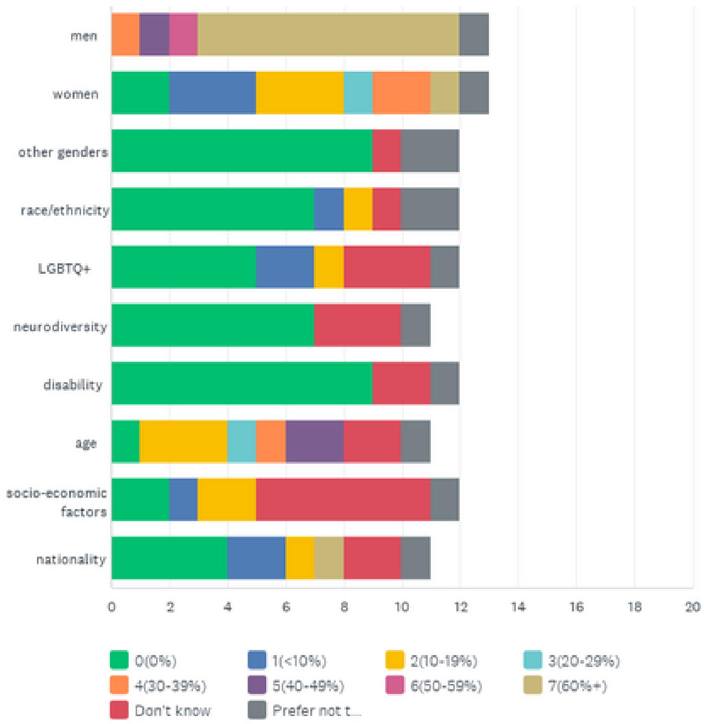
Note: on the following graphs, the horizontal line from 0 to 20 represents the number of responses. The colours represent the rating of each respondent's perception of their situation (i.e. - how the following groups are represented according to them from 0 to 7).



Q6 Are the following groups represented among your freelancers on a scale of 0 to 7?



Q7 Are the following groups represented among your board (or managing directors or other persons who manage your association if there is no formal board as such), on a scale of 0 to 7?



CONCLUSIONS AND RECOMMENDATIONS

- This was IMPALA's first attempt to carry out a survey of this kind and we quickly learned that we need more simplicity. We issued a second version for businesses as the initial one was perceived as too detailed and complex.
- The exercise was also complicated by the timing, the pandemic, general survey fatigue, lack of resources and time within the membership, as well as the fact that the surveys were complex.
- We wanted to achieve a snapshot of the sector with a sample of different countries and varying sizes of businesses from the smallest to the biggest. We believe we achieved this.
- We also wanted to have respondents with different approaches, which we did.
- It is likely that those who are most active on these issues will have completed the survey, so the results won't necessarily be reflective of the whole sector. When looking at the results, this should be borne in mind.
- Some members have a clear view on what they want to do, have policies in place and are making changes.
- Others are not making changes, mostly due to their small size or lack of finances, or because they see themselves as already diverse, or they don't agree there is an issue, or they do agree but don't know where to start.
- IMPALA's training is perceived as valuable and should continue, as well as the tools we provide, such as charter, guidance, business case etc.
- Funding and other support for projects in the sector has come out as a key need.
- We will ask the EC to develop more EU diversity related projects with funding.
- We will spread more awareness on EU funding and make sure members know what is available (we send regular notes ahead of EU calls for projects, and we have an EU project committee that can also review opportunities).
- We ask national associations to check if there are national funds and share the news, as well as push for more support.
- The next survey should be two years after the first one and we would maintain a similar approach to assess what changes businesses are making and their challenges as well as the services that IMPALA provides. We should keep the surveys as simple as possible, based on the second version for businesses rather than the first.
- As regards mapping the diversity of the sector in terms of workforce etc, we believe a different approach is needed. We invite the EC and Eurostat to work with the music sector and the broader cultural field to help set up a system that maps diversity in a concrete and comprehensive way that also respects national rules about gathering data on these issues.

Surveying members was the first of IMPALA's diversity and inclusion charter's twelve commitments, released in October 2021. To find out about IMPALA's other work in the area of equity, diversity and inclusion, click here.