MASSEY UNIVERSITY
TE KUNENGA KI PŪREHUROA
UNIVERSITY OF NEW ZEALAND

APRA AMCOS

A Report Drawn From Amplify Aotearoa
New Zealand Music Community Diversity Survey

GENDER DIVERSITY

AMONG AOTEAROA/ NEW ZEALAND'S APRA AMCOS MEMBERSHIP

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Suggested citation
Hoad, C. and Wilson, O. (2020). Gender Diversity Among Aotearoa/
New Zealand's APRA AMCOS Membership. Massey University, Wellington.

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WHAT IS AMPLIFY AOTEAROA?

Amplify Aotearoa is a research project developed by academics at Massey University in collaboration with APRA AMCOS New Zealand. APRA AMCOS is a non-profit Australasian organisation that collects and distributes song writing royalties to its 110,000 songwriter, composer and music publisher members across New Zealand and Australia. This research focuses on APRA AMCOS NZ's membership of over 12,000 song writers and composers. This project responds to growing calls, as well as recent international research, that demand critical investigations into diversity within music industries.

Much of our impetus for Amplify Aotearoa was driven by our own experiences and observations as practitioners, but also by our position as educators who are dedicated to supporting people seeking to make a life for themselves in music. Through both our teaching and research, our goal is to contribute to a safe, equitable, and accessible industry. By conducting this study, we hope to help forge a fairer and more inclusive environment for people to make and share music.

Funding for this project was awarded via a Massey University Research Grant, and ethics approval was granted through the Massey University Human Ethics Committee. Survey data was managed and processed by Hayley Stirling, and additional visualisations were provided by Milad Katebi and Minh Chau Van Nguyen. Report layout and design was done by Open Lab with illustrations by Bridget Clarke.

We would like to thank our students and colleagues at the School of Music and Creative Media Production at Massey University in Wellington, who patiently and repeatedly tested the survey. We would also like to thank Dr Catherine Strong at RMIT for advice and inspiration, as well as the team at APRA AMCOS NZ, especially Lydia Jenkin for her integral role in this project.

Dr Catherine Hoad
Dr Oli Wilson

SUMMARY OF FINDINGS

70.1% OF WOMEN

EXPERIENCE BIAS, DISADVANTAGE OR DISCRIMINATION BASED ON THEIR GENDER – SEVEN TIMES THE RATE OF MEN (10%).

TECHNOLOGY, SOUND AND PRODUCTION

ARE ROLES WHERE WOMEN ARE PARTICULARLY UNDER-REPRESENTED.

45.2% OF WOMEN

REPORT NOT FEELING SAFE IN PLACES WHERE MUSIC IS MADE AND/OR PERFORMED – OVER TWICE THE RATE OF MEN.

51.1% OF WOMEN

HAVE EXPERIENCED BIAS, DISADVANTAGE, OR DISCRIMINATION BASED ON AGE.

OTHER BARRIERS TO SUCCESS WERE:

Not having

PERSONAL FINANCES

ACCESS TO REGULAR WORK

ACCESS TO EQUIPMENT

ACCESS TO TRAINING AND EDUCATION

A SUITABLE MENTOR AND/OR ROLE MODEL

RAP, METAL AND HIP HOP

ARE GENRES WHERE WOMEN ARE ESPECIALLY UNDER-REPRESENTED.

GENDER DIVERSE

RESPONDENTS REPORTED EXPERIENCING BIAS, DISADVANTAGE OR DISCRIMINATION, AND BARRIERS TO THEIR SUCCESS, BUT REPRESENTED A SAMPLE SIZE TOO SMALL TO DRAW STRONG STATISTICAL FINDINGS.

WHY FOCUS ON GENDER DIVERSITY IN THE AOTEAROA/NEW ZEALAND MUSIC INDUSTRY?

This report presents targeted findings from the Amplify Aotearoa: New Zealand Music Community Diversity Survey, which was disseminated through social media and music industry channels in October and November 2019. Using a quantitative survey tool, we gathered demographic data, including age, ethnicity, gender, sexual orientation, location, as well as data about people's roles, genres, education, perceptions on career satisfaction, and how much of their income they earn through music. We also gathered data about experiences of bias, disadvantage or discrimination, and asked people to rate various barriers to their success. The results presented in this report are drawn from 637 usable responses by people who opted to disclose their gender, declared that they were registered with APRA AMCOS NZ, and were over the age of 16. This scope is important for our statistical analysis, as we were able to apply post-stratification weights against APRA AMCOS NZ membership figures on age and gender. This means that our findings reflect the broader APRA AMCOS NZ membership over the age of 16.

APRA AMCOS NZ FIGURES SHOW THAT ONLY

24.1% OF MEMBERS ARE

WOMEN

Through this project we have heard from practitioners across all areas of the music industry: songwriters, performers, composers, producers, educators, label managers, audio engineers, retailers, students, mentors, administrators, and more. Our respondents came from all over the country, and represented a variety of age groups, ethnicities, sexualities, genders, and time spent in the industry. The survey results foregrounded several areas of concern which we discuss towards the end of the report. However, the results pertaining to gender were the most pronounced and consistent, which is why this report focuses on that area. These results highlight the need for focused analysis on intersectional issues that impact gender diversity in the music industry.

The limited figures available on gender in Aotearoa/New Zealand music suggest that our industry is unbalanced and unfair for women. A statement from APRA AMCOS in 2017 affirmed that less than a quarter of Aotearoa/New Zealand members are women (Kelly, in Behan 2017). In music education, Tertiary Education Commission (TEC) enrolment data shows that Pākehā men from high decile backgrounds are over-represented in music degrees (Tertiary Education Commission 2020). Growing local media coverage has also been critical of the lack of women on Aotearoa/New Zealand's festival line-ups (Johnstone 2019, Shui 2020). Internationally, and in some local cases, media reports of sexual harassment and discrimination have also emerged. The issue of gender inequality, representation, and associated experiences, are increasingly gaining mainstream attention, and a growing number of high profile individuals and organisations have joined the call for intervention.

Our research was inspired by a 2017 study by RMIT University in partnership with APRA AMCOS Australia, where women reported facing a range of systemic barriers in the screen music industry (Strong and Cannizzo, 2017). Similarly, the 2017 'Skipping a Beat: Assessing the State of Gender Equality in the Australian Music Industry' report showed that Australian women are under-represented, earn less, receive less airplay, and win fewer awards than men (Cooper, Coles and Hanna-Osborne 2017). We were also influenced by the USC Annenberg Inclusion Initiative study entitled 'Inclusion in the Recording Studio' (2018), which found that the ratio of men to women as represented in Billboard charts was 3.6 to 1, and that women represent only 2.1% of producers. A 2019 study by Berklee's Institute for Creative Entrepreneurship (Prior, Barra, and Kramer, 2019) similarly reported that the majority of women in the United States music industry have experienced some form of gender

discrimination. A report examining the music industry in Ontario, Canada (Nordicity 2015) revealed intersectional issues, where women of colour were significantly under-represented in localised industry practices.

The music industry and its advocates in Aotearoa/New Zealand have already begun taking positive steps towards addressing these issues. In 2018, the New Zealand Music Commission and Independent Music New Zealand signed the Keychange Pledge, an international campaign working towards gender equality. Initiatives such as Equalise My Vocals have also strived to raise the voices of women, transgender, and gender diverse people at all levels of local music, while Girls Rock Camp, a week-long music-focused holiday programme for women, transgender and gender non-conforming youth, has run successfully in Auckland and Wellington. Festivals have also begun to address poor gender representation, and have publicised efforts to increase the diversity of their line-ups and staffing. These initiatives, and others not mentioned here, are cause for optimism.

We begin this report by viewing the demographic makeup of APRA AMCOS NZ, providing a snapshot on the gender, ethnicity, age, location, disability, and sexual orientation of members. The following section examines the gender distribution within genres and music roles, and cross-references results with relevant Stats NZ Census data where available. Next we report on career satisfaction and the ability of members to earn through music.

We then explore instances of bias, disadvantage or discrimination. The final results section explores 22 potential barriers to success. We conclude by offering a summary of key themes that can help target intervention strategies, and discuss where this research reveals other areas of concern. The final sections outline our research methodology, and list the sources cited throughout this report.

The findings in this report are relevant to everyone with an interest in the music industry. Diversity within creative industries is understood not only as a social issue, but also one with measurable economic implications. The Gross Domestic Product (GDP) contribution of the Aotearoa/New Zealand creative industries, including music, was estimated to be $3.8b in 2015 (PWC 2015). Recent figures estimate the music industry in particular to be worth $731m to GDP, both directly and indirectly, and supports 6,370 jobs in total (PWC 2019). However, international research has found that a lack of diversity in creative industries carries negative economic impacts and inhibits productivity (Straw and Warner 2014). Other studies correlate increases in organisational diversity with increases in performance (Eliza 2015). Studies have also suggested that improved gender diversity, alongside ethnic diversity, contributes to the competitiveness of regional economies due to the positive relationships between diversity, creativity and innovation (Smallbone, Bertotti, and Ekanem 2005).

OUR KEY FINDINGS

Our key findings are drawn from instances where comparisons between men and women respondents have 95% confidence intervals that do not overlap. This means that our key findings report areas with strong statistical disparities between men and women.

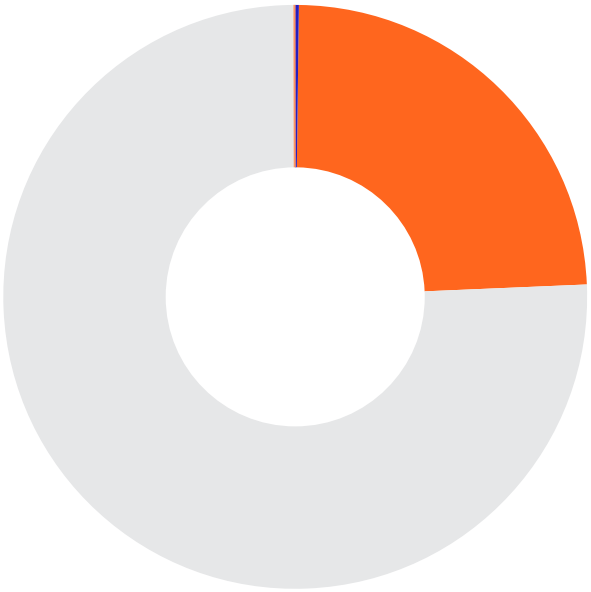
GENDER DIVERSE GROUPS

Gender diverse groups are included in this report, though due to a small sample size, gender diverse findings are not statistically strong. We decided to include the results from gender diverse respondents to give visibility to gender diverse communities who are often overlooked in quantitative surveys.

TRENDS

Our descriptive analysis highlights where trends emerge, and all visualisations compare men, women and gender diverse categories.

SAMPLE DEMOGRAPHICS

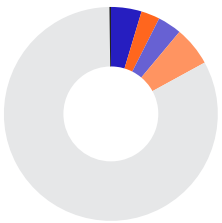


GENDER

Men	75.6%
Women	24.1%
Gender Diverse	0.2%
Prefer not to say	0.1%

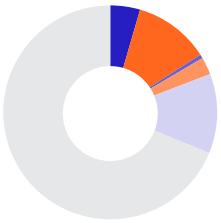
AGE (YEARS)

31-40	28.4%
51+	24.5%
<30	23.9%
41-50	23%
Prefer not to say	0.2%



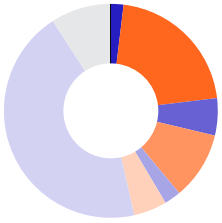
SEXUAL ORIENTATION

Heterosexual	82.3%
Bisexual	5.9%
Prefer not to say	4.6%
Gay or Lesbian	3.6%
Other (not specified)	2.8%
Don't know	0.8%



ETHNICITY

NZ European	70.3%
Māori	12.3%
Other	11.7%
Pacific Peoples	2.7%
Prefer not to say	2.4%
Asian	0.6%



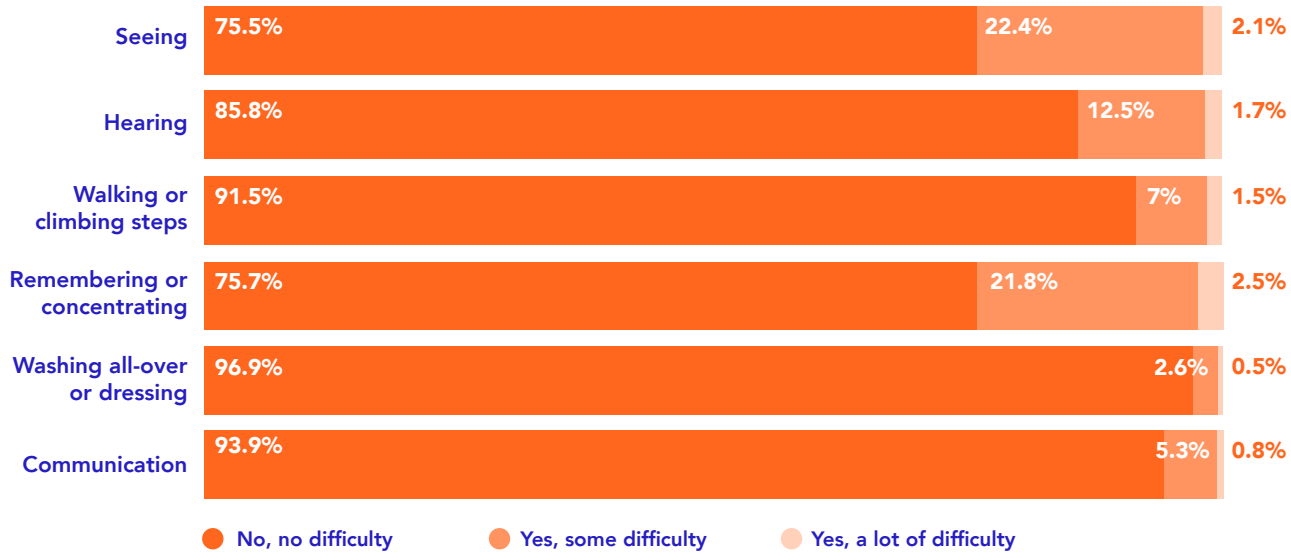
LOCATION

Auckland	44.2%
Wellington and Greater Wellington	21.1%
Otago or Southland	10.2%
Canterbury	9.1%
Waikato, Taranaki or Manawatu-Wanganui	5.6%
Gisborne, Bay of Plenty or Hawkes Bay	4.9%
Northland, Tasman/ Nelson, Marlborough or West Coast	2.5%
Overseas	1.9%
Prefer not to say	0.5%

To find out about who comprises the APRA AMCOS NZ membership, we gathered data on gender, ethnicity, sexual orientation, age, location and disability. These graphs provide a demographic snapshot of membership at a more detailed level than the organisation currently records. These sample demographics are drawn from the 646 complete registered APRA AMCOS NZ survey results that were collected from a total of 12,013 email invitations that were successfully delivered. This equates to a participation rate of 5.3% of active members with an active email account on record. Gender sample sizes comprise 440 men, 186 women, 11 gender diverse respondents and 9 who preferred not to say.

DISABILITY

DIFFICULTY WITH THE FOLLOWING



ROLES, ACTIVITIES, AND GENRES

This section examines the distribution of roles among APRA AMCOS NZ members, as well as the various types of music they make. It is assumed that APRA AMCOS NZ members undertake some form of song writing or composing. However, it is well understood that individual music careers tend to be made up of a range of intersecting roles and activities. These have been referred to as 'portfolio careers' and have been observed internationally (see Bartleet et. al. 2019). Consistent with methodologies utilised in comparable reports (c.f. Smith 2019), we asked respondents to select all roles and activities that were relevant to them. The visualisation overleaf shows the total number of men, women and gender diverse responses in each role, not percentages with post-stratified weightings.

KEY FINDINGS

The distribution of APRA AMCOS NZ members across roles and activities in the music industry appears gendered.

GREATEST DISPARITY

Audio engineer	M 85%	W 12.5%
Producer	M 77.9%	W 19.5%
Sound artist/designer	M 79.1%	W 20.9%
Composer	M 73.2%	W 24.4%

LEAST DISPARITY

Studying music	M 52.3%	W 43.2%
Vocalist	M 56%	W 41.8%
Business/administration	M 58.3%	W 41.7%
Publishing, sales and /or promotions	M 56.8%	W 40.5%

The distribution of APRA AMCOS NZ members across genres also appears gendered.

GREATEST DISPARITY

Rap	M 88.5%	W 9.2%
Metal	M 87.1%	W 11.8%
Hip hop	M 85.7%	W 12.6%

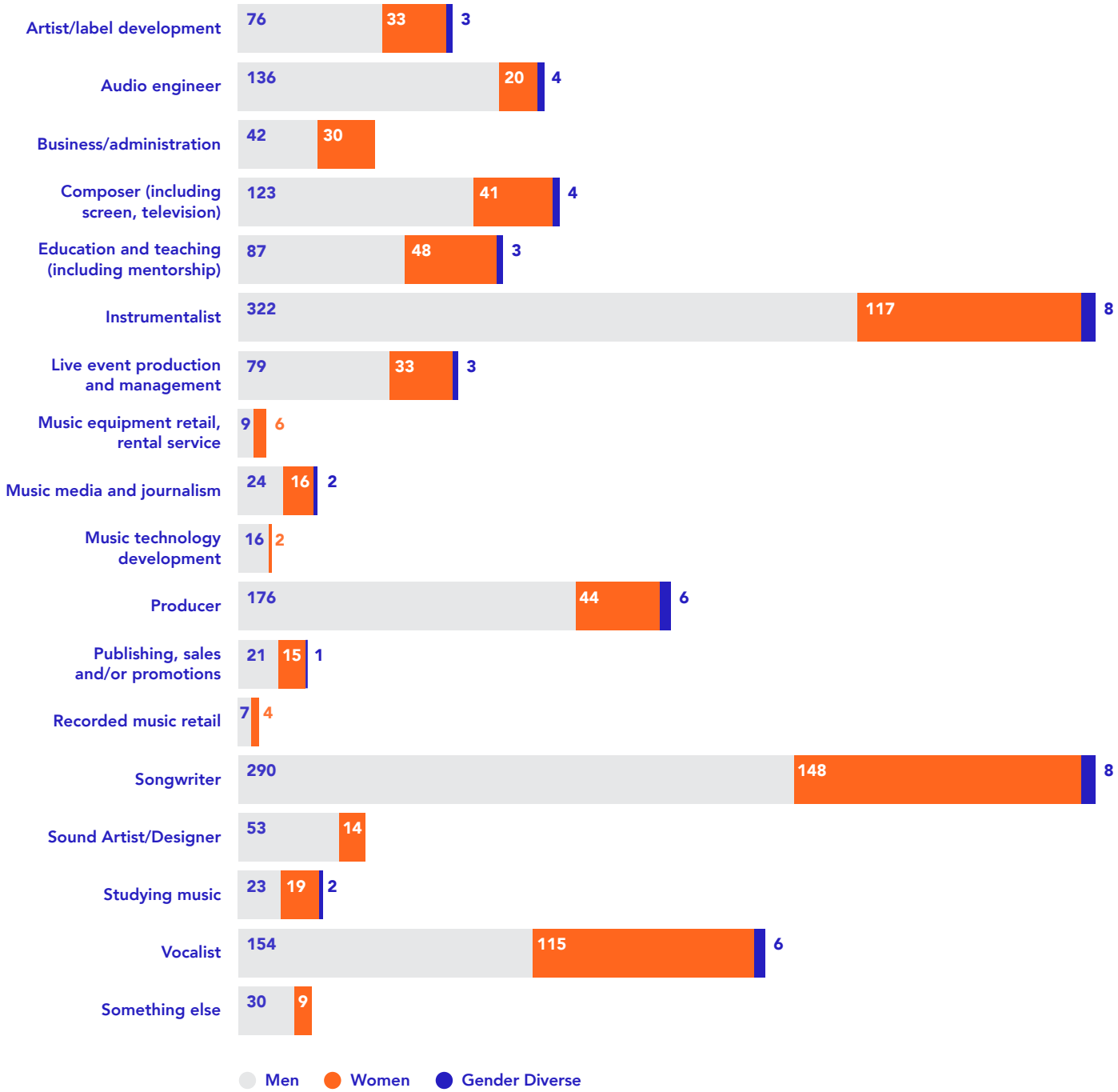
LEAST DISPARITY

Waiata Māori	M 60%	W 40%
Theatre	M 61.1%	W 35.8%
Classical	M 65.7%	W 33.3%

Rap and Hip hop were listed as separate categories in deference to long-discussed distinctions between the two as musical forms, as articulated by Mitchell (2001) and Turner (2017).

WHAT DO YOU CONSIDER TO BE YOUR MAIN MUSICAL ROLES AND ACTIVITIES?

MUSICAL ROLES BY GENDER



A closer look into the gender disparities within roles and activities reveal that roles relating to **technology, sound** and **production** are most proportionately dominated by men. In the following table, roles are ranked from the greatest to the least disparities between men and women, as measured via percentages within each role.

TABLE 1

GENDER DISPARITIES WITHIN MUSIC ROLES

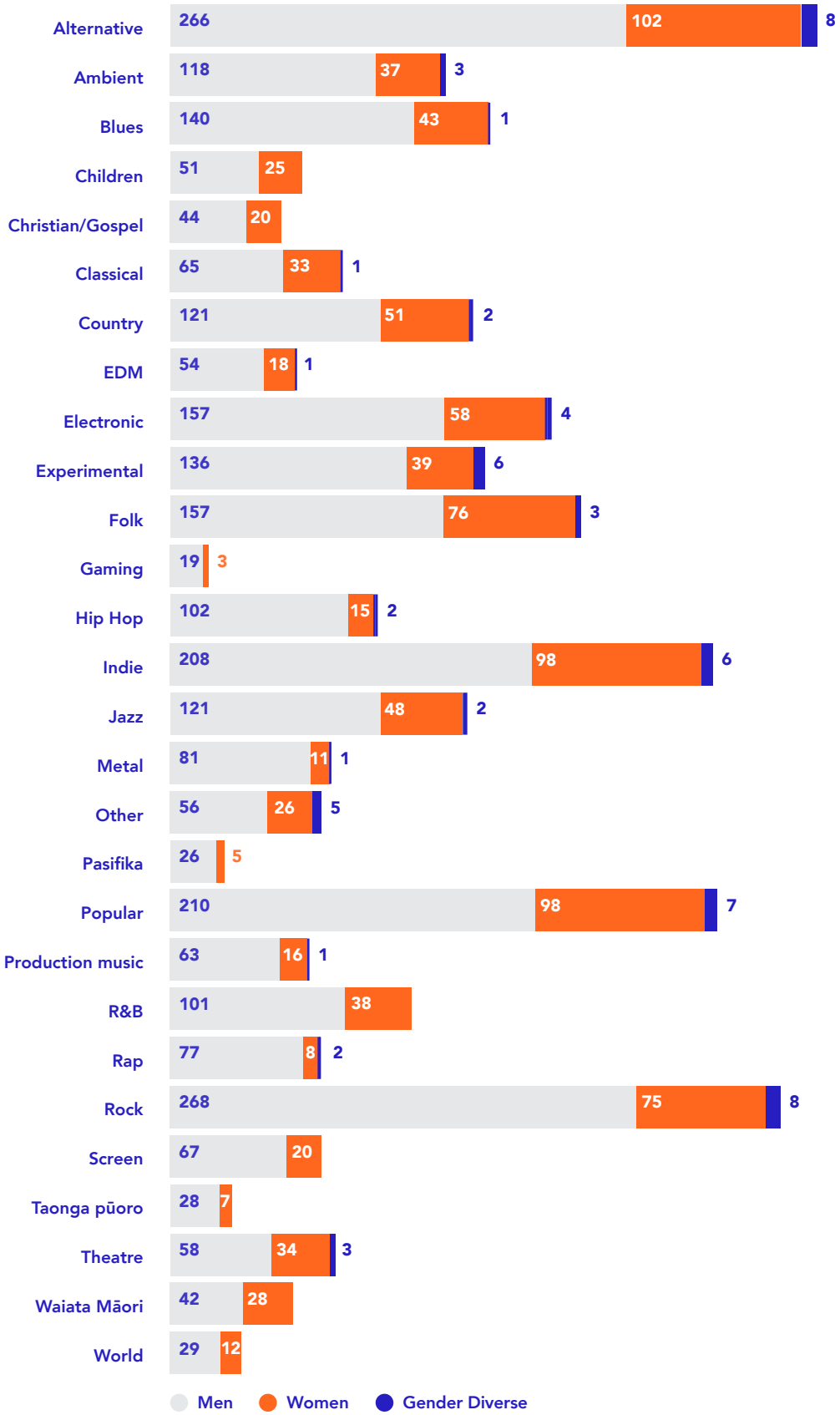
Role	Men	Women	Gender Diverse
Music technology development*	88.9%	11.1%	0%
Audio engineer	85%	12.5%	2.5%
Producer	77.9%	19.5%	2.6%
Sound artist/designer	79.1%	20.9%	0%
Composer (including screen, television)	73.2%	24.4%	2.4%
Something else*	76.9%	23.1%	0%
Instrumentalist	72.0%	26.2%	1.8%
Live event production and management	68.7%	28.7%	2.6%
Artist/label development	67.9%	29.4%	2.7%
Songwriter	65%	33.2%	1.8%
Education and teaching (including mentorship)	63%	34.8%	2.2%
Recorded music retail*	63.6%	36.4%	0%
Music media and journalism	57.1%	38.1%	4.8%
Music equipment retail, rental service*	60%	40%	0%
Publishing, sales and/or promotions	56.8%	40.5%	2.7%
Business and administration	58.3%	41.7%	0%
Vocalist	56%	41.8%	2.2%
Studying music	52.3%	43.2%	4.5%

* These categories had fewer than thirty respondents and should be viewed with caution

The gender disparities pertaining to audio and music technology outlined in Table 1 are broadly consistent with 2018 Statistics NZ Census data (StatsNZ 2020), which show that women[1] comprise only 8.7% of sound technicians. This category in the NZ Census includes film, television and theatre sound technicians, indicating that gender imbalances in sound-related roles are also common in other sectors. Other occupation data from the 2018 Census reveals broadly similar gender disparities, with musicians (instrumental) comprising 72.9% men and 27.1% women[2], and composers comprising 82.9% men and 17.1% women[3]. Results for education and teaching differ with the NZ Census data showing fewer men than women in this category (36.2% men compared to 63.8% women)[4], suggesting that many music teachers are not APRA AMCOS NZ members.

1 Census NZ provided gender distributions in 'men' and 'women' categories only.
2 N = 1075, with 786 male and 291 female.
3 N = 123, with 102 male and 21 female.
4 N = 2898, with 1050 male and 1848 female.

IN WHICH GENRES HAVE YOU PERFORMED, WRITTEN SONGS, AND/OR COMPOSED MUSIC?



The data concerning roles and activities does not indicate what kind of music members make, so we asked respondents to select the various genres in which they perform, write and/or compose. Similar to roles and activities, many practitioners work across different styles and traditions, so this question allowed respondents to select all genres relevant to them. Because of this, the above visualisation shows the total number of men, women and gender diverse responses in each genre, not percentages with post-stratified weightings.

TABLE 2

GENDER DISPARITIES WITHIN GENRES

Genre	Men	Women	Gender Diverse
Rap	88.5%	9.2%	2.3%
Metal	87.1%	11.8%	1.1%
Hip hop	85.7%	12.6%	1.7%
Gaming*	86.4%	13.6%	0%
Pasifika*	83.9%	16.1%	0%
Taonga pūoro*	80%	20%	0%
Production music	78.8%	20%	1.2%
Rock	76.3%	21.4%	2.3%
Experimental	75.1%	21.6%	3.3%
Screen	77%	23%	0%
Blues	76%	23.4	0.6%
Ambient	74.7%	23.4%	1.9%
EDM	74%	24.6%	1.4%
Electronic	71.7%	26.5%	1.8%
R&B	72.7%	27.3%	0%
Alternative	70.8%	27.1%	2.1%
Jazz	70.8%	28%	1.2%
World	70.7%	29.3%	0%
Country	69.5%	29.3%	1.2%
Christian/Gospel	68.8%	31.2%	0%
Other	64.4%	29.9%	5.7%
Popular	66.7%	31.1%	2.2%
Indie	66.7%	31.4%	1.9%
Folk	66.5%	32.2%	1.3%
Children	67.1%	32.9%	0%
Classical	65.7%	33.3%	1%
Theatre	61.1%	35.8%	3.1%
Waiata Māori	60%	40%	0%

* These categories had fewer than thirty respondents and should be viewed with caution

Like main music roles and activities, genres have large variances in sample sizes. A closer look into the gender distribution within genres reveal that rap, metal and hip hop are most proportionately dominated by men. In the above table, genres are ranked from the greatest to the least disparities between men and women, as measured via percentages within each role.

INCOME, CAREER SATISFACTION, AND EDUCATION

Because APRA AMCOS NZ already collects data on membership income in the form of royalties, we asked respondents to report more broadly on their careers. The following visualisations show how respondents identified how they earn money through music, their career satisfaction, and their highest level of education. These results highlight a strong relationship between age and gender when examining career satisfaction.

KEY FINDINGS

Our findings show some gender disparities in respondents' ability to earn income through music, and career satisfaction. However, these differences were not statistically significant.

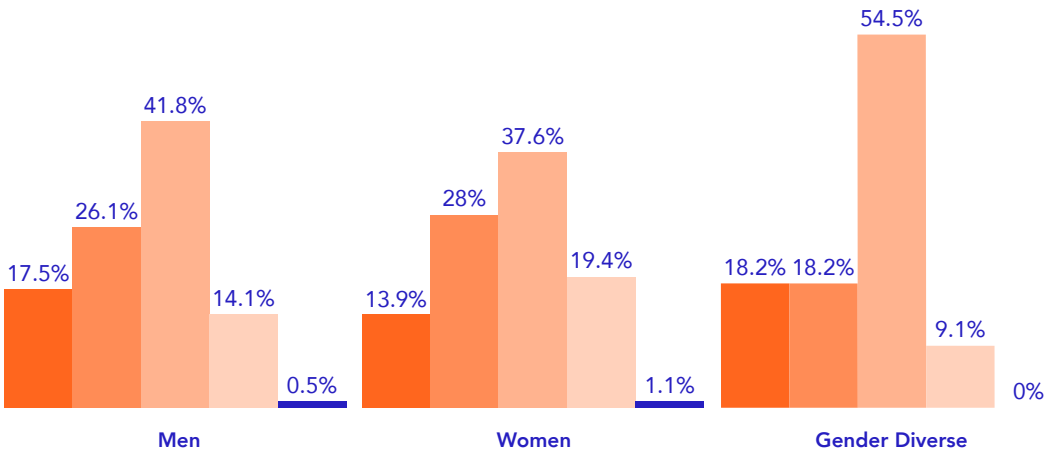
In asking about highest level of education, the results were stronger.

A greater proportion of men only have primary or secondary education as their highest level of education, compared to women.

HIGHEST LEVEL OF EDUCATION

Primary or Secondary

PROPORTION OF INCOME EARNED THROUGH MUSIC: WHICH OF THE FOLLOWING BEST DESCRIBES YOU?

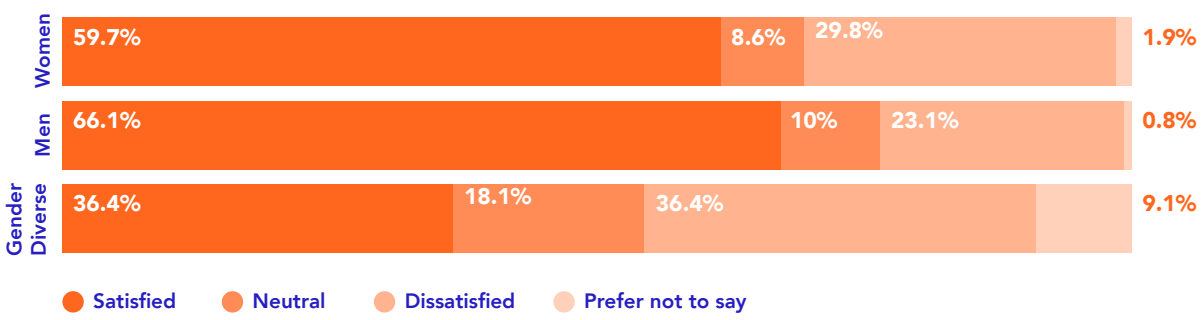


- **I earn most of my income through my music** (performer/songwriter/producer etc)
- **I receive some income from my music, and work elsewhere in a music related field** (including teaching) to earn a living
- **I receive some income from my music, but work in another non-music related field to earn a living** (includes taking a break from music but still receiving royalties)
- **I rarely or do not receive any income from my music** (i.e. music is my hobby)
- **I have retired** from my role/s in the music industry

Many respondents reported that they were able to make **some income from music royalties, but earned money elsewhere,** in both music-related and non-music-related fields.

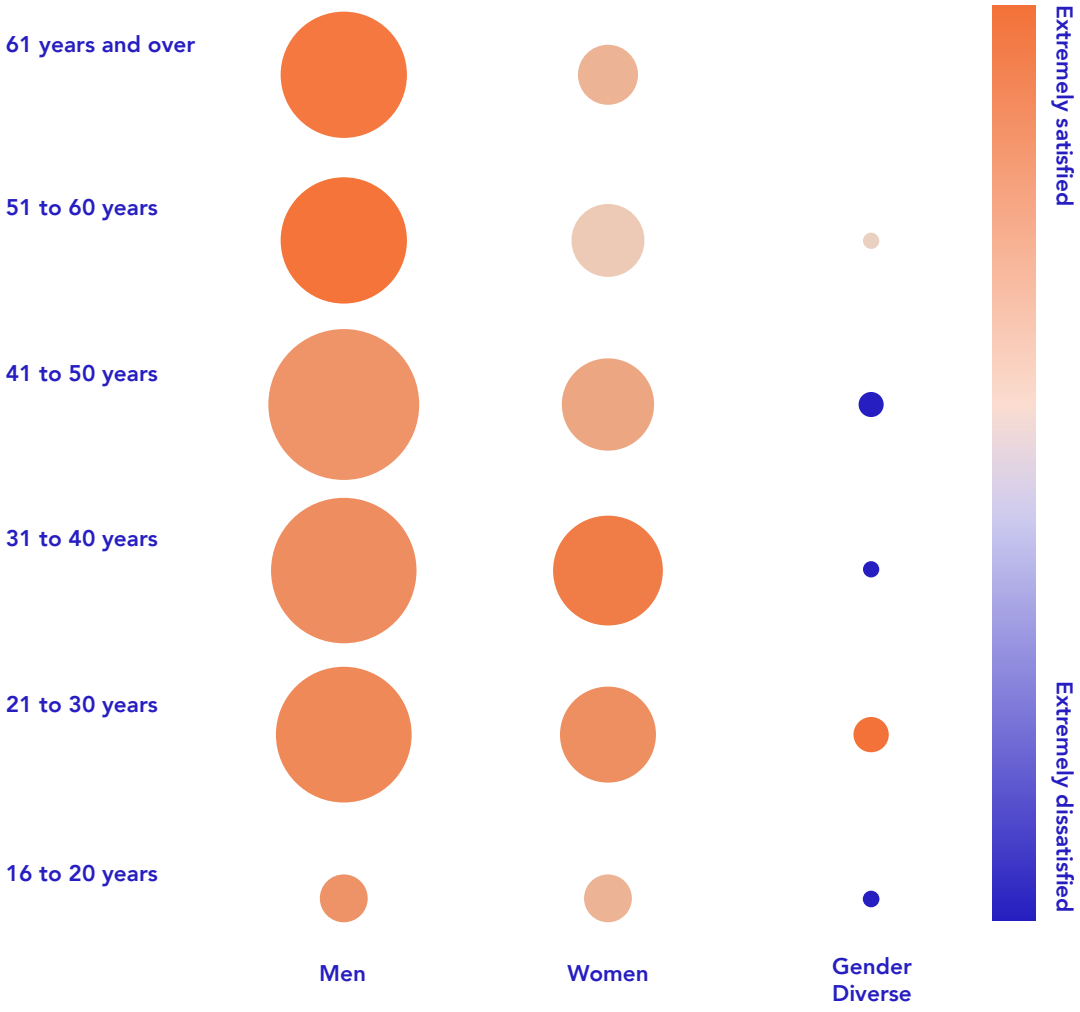
In order to gain more nuanced insights into how respondents perceive success in their music careers, we examined **overall career satisfaction.** Results were presented along a 7-point scale from "extremely satisfied" to "extremely dissatisfied". The below visualisation presents results aggregated into three categories, satisfied (1-3), neutral (4) and dissatisfied (5-7), and is organised by gender.

CAREER SATISFACTION




Thank
You

CAREER SATISFACTION ACROSS AGE AND GENDER

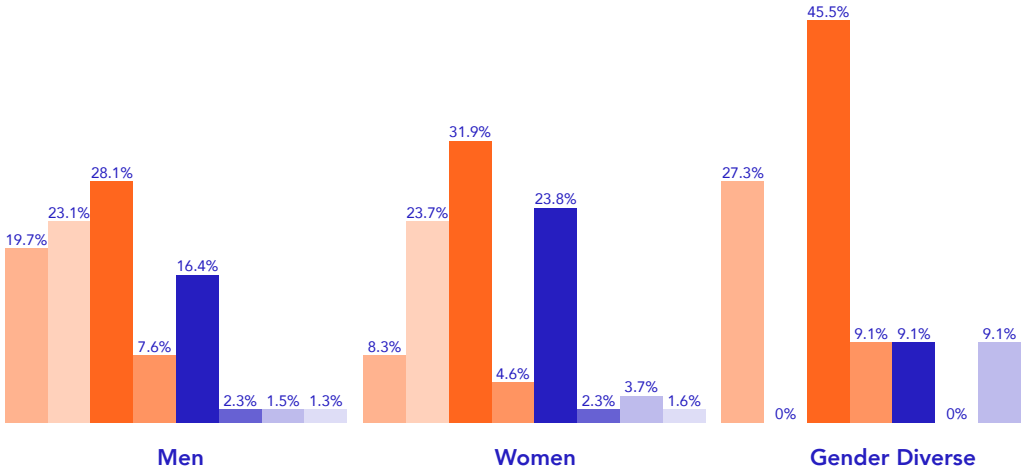


HOW TO READ THIS VISUALISATION

The size of the circle represents the quantity of respondents who selected this category. The bigger the circle, the more APRA AMCOS NZ members are represented. The colour of the circle indicates the average results pertaining to career satisfaction, with orange representing mostly satisfied, and blue representing mostly dissatisfied.

We examined career satisfaction against a range of other factors, such as age, location, occupation, ethnicity, sexual orientation and disability. In the above multi-variable visualisation, we see a relatively consistent spread in career satisfaction across men, with slightly higher career satisfaction in older age groups. The visualisation also shows a decrease in satisfaction for women beyond the age of 40. It also shows that there are proportionally fewer women APRA AMCOS NZ members at these older age groups.

WHAT IS YOUR HIGHEST LEVEL OF EDUCATION?



- Primary or secondary education
- Tertiary certificate, diploma or advanced diploma
- Bachelor degree
- Graduate diploma or graduate certificate
- Postgraduate degree
- I have never completed any formal education
- Other
- Prefer not to say

The survey also investigated the highest levels of education respondents had received. The above graph visualises the distribution of education across genders, and shows that a statistically higher proportion of men have primary or secondary education as their highest level of education than women.

BIAS, DISADVANTAGE, OR DISCRIMINATION

To gain insights into the degree to which bias, disadvantage or discrimination occurs in the Aotearoa/New Zealand music industry, participants were asked whether they had personally experienced, or knew about, any kind of bias, disadvantage or discrimination due to age, gender, race or ethnicity, sexual orientation, and/or disability. The visualisations overleaf present findings organised by gender.

KEY FINDINGS

Women are more likely to report experiencing bias, discrimination, and disadvantage than men, in all areas we presented.

The barriers where the 95% confidence intervals did not overlap, indicating clear statistical disparities between men and women, include:

More than two-thirds of women report experiencing bias, disadvantage, or discrimination based on gender – seven times the rate of men.

GENDER

Experiencing bias, disadvantage, or discrimination.

M 10%

W 70.1%

More than half of women report experiencing bias, disadvantage, or discrimination based on age.

AGE

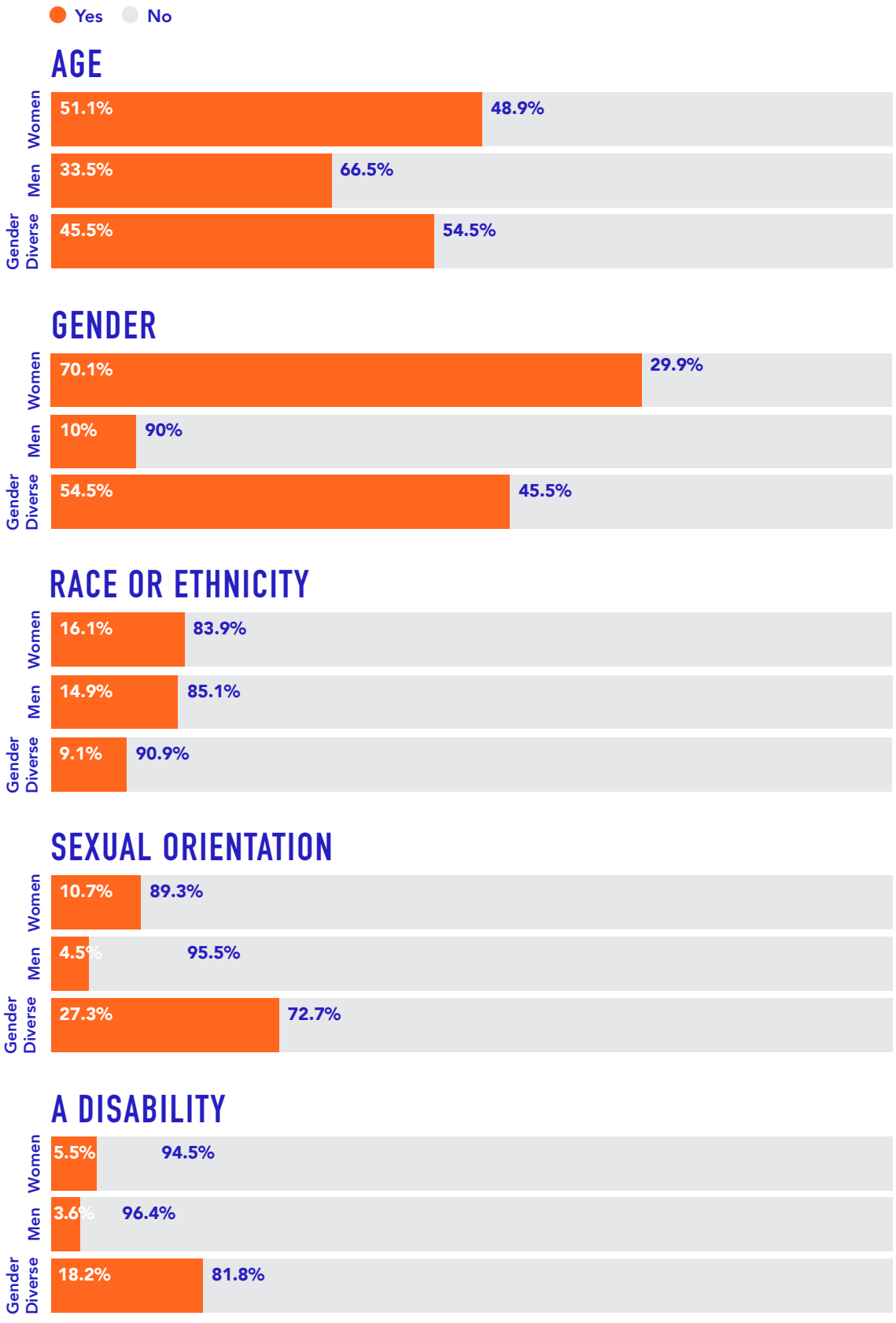
Experiencing bias, disadvantage, or discrimination.

M 33.5%

W 51.1%

HAVE YOU PERSONALLY EXPERIENCED...

...any kind of bias, disadvantage or discrimination in the New Zealand music industry because of any of the following?



WHAT RESPONDENTS TOLD US ABOUT BIAS, DISCRIMINATION, AND DISADVANTAGE

The result showing personal experiences of bias, disadvantage or discrimination because of gender had the greatest disparity between men and women across the entire survey. To better understand this issue, our research also collected qualitative responses, where participants were invited to provide written accounts of their experiences as they pertain to bias, disadvantage, or discrimination. Some of these accounts indicate that individual experiences of gender bias intersect with demographic factors, and other areas of bias, disadvantage or discrimination.

In summary

SEXUAL HARASSMENT

Women reported they were regularly subject to instances of sexual harassment from industry figures, colleagues, and crowds. Specific instances described sexual coercion and assault, unwanted physical advances, and inappropriate comments pertaining to appearance.

UNDERVALUED, OVERLOOKED, AND PATRONISED

Women reported being undervalued, overlooked, and patronised by their peers. These experiences were often reported in relation to technical, sound and audio engineering fields.

OVERT RACISM AND MICRO-AGGRESSIONS

Some Māori and Pacific Peoples report being subject to overt racism, and micro-aggressions such as being associated with 'rough crowds'.

ROUTINELY OVERLOOKED IN FAVOUR OF YOUNGER ACTS

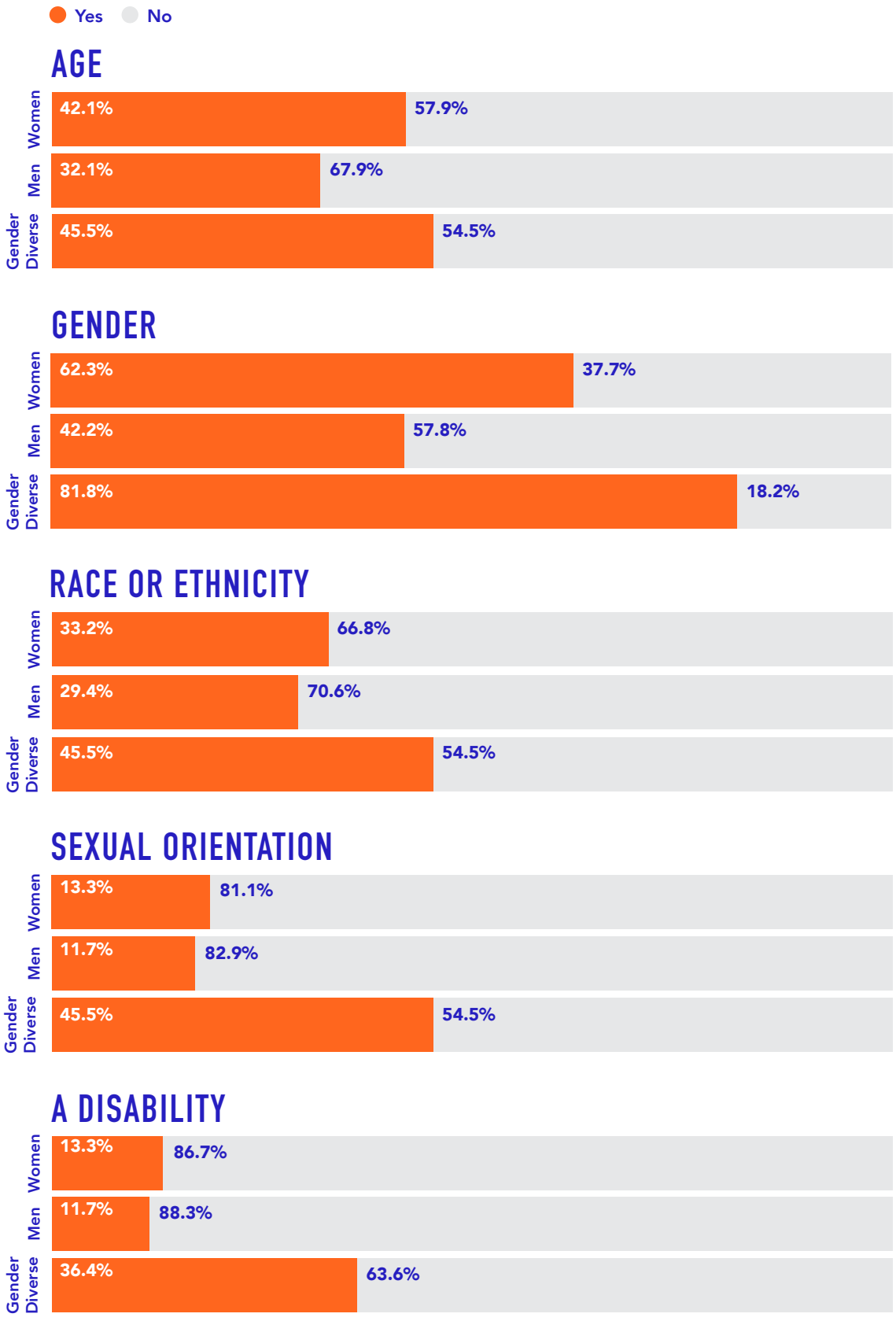
Some older respondents, and especially some older women, felt that they were routinely overlooked in favour of younger acts, despite having greater experience and self-perceived levels of professionalism.

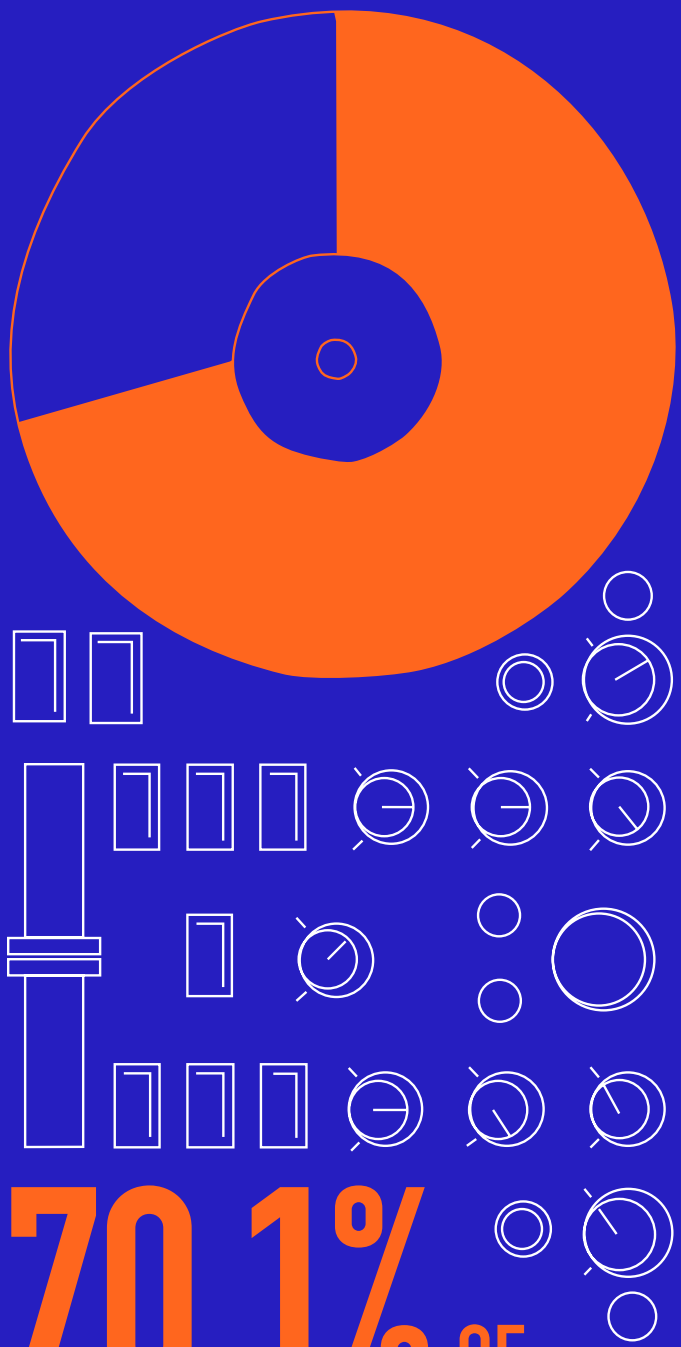
GENDER DIVERSITY

A lack of gender diversity in lineups was regularly mentioned, and women reported instances of being turned down because a festival had already fulfilled its 'quota'.

DO YOU KNOW OF INCIDENTS WHERE...

...other people working in any role in the music industry have experienced bias, disadvantage or discrimination because of one of the below?





70.1% OF WOMEN EXPERIENCE BIAS BASED ON GENDER

BARRIERS TO SUCCESS

To better understand the barriers to building a career in the Aotearoa/New Zealand music industry, we asked participants to rate the extent to which barriers had been factors to their success. We listed 22 ordinal scale barriers about personal lives, employment, support and training and resources.

Participants were asked to rate on a six-point scale the degree to which they had experienced each potential barrier, where:

- 1 = 'always been a barrier'
- 5 = 'never been a barrier', and
- 6 = 'not applicable to me'

The six-point scale was then collapsed into four categories, combining:

- 'always been a barrier' and 'very often been a barrier'
- 'never been a barrier' and 'rarely been a barrier'

The middle of the scale is presented as:

- 'sometimes been a barrier'.

KEY FINDINGS

Women are more likely to report experiencing barriers to success than men in all areas we presented.

The barriers where the 95% confidence intervals did not overlap, indicating clear statistical disparities between men and women, include:

ALWAYS OR VERY OFTEN A BARRIER OR SOMETIMES A BARRIER

Not feeling safe in places where music is made and/or performed.

M 20.5% W 45.2%

ALWAYS OR VERY OFTEN A BARRIER

Not having the personal finances to support a career in music.

M 53.7% W 70.6%

ALWAYS OR VERY OFTEN A BARRIER

Not having access to regular work.

M 36.9% W 49%

ALWAYS OR VERY OFTEN A BARRIER

Not having access to equipment.

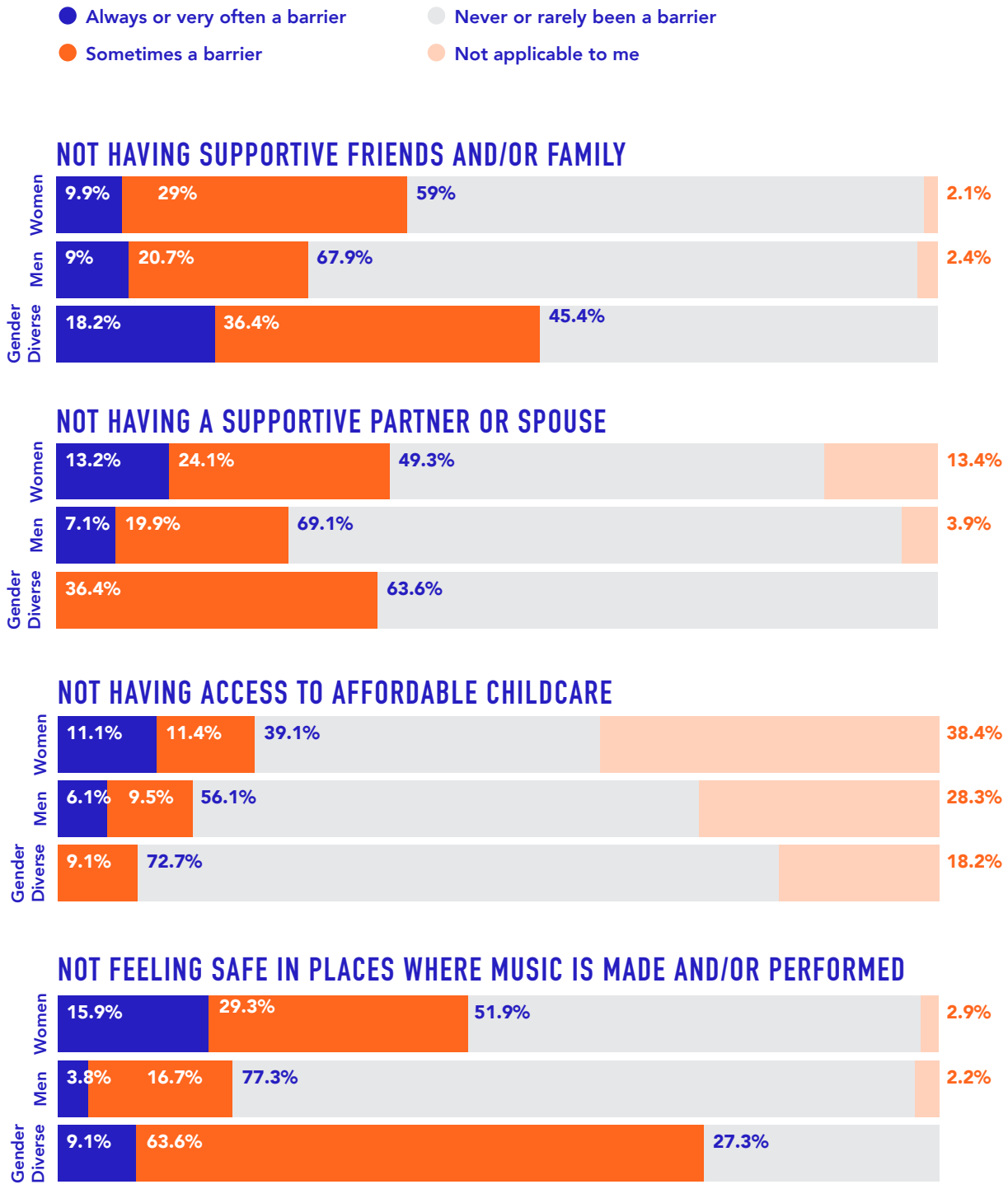
M 9.1% W 20.4%

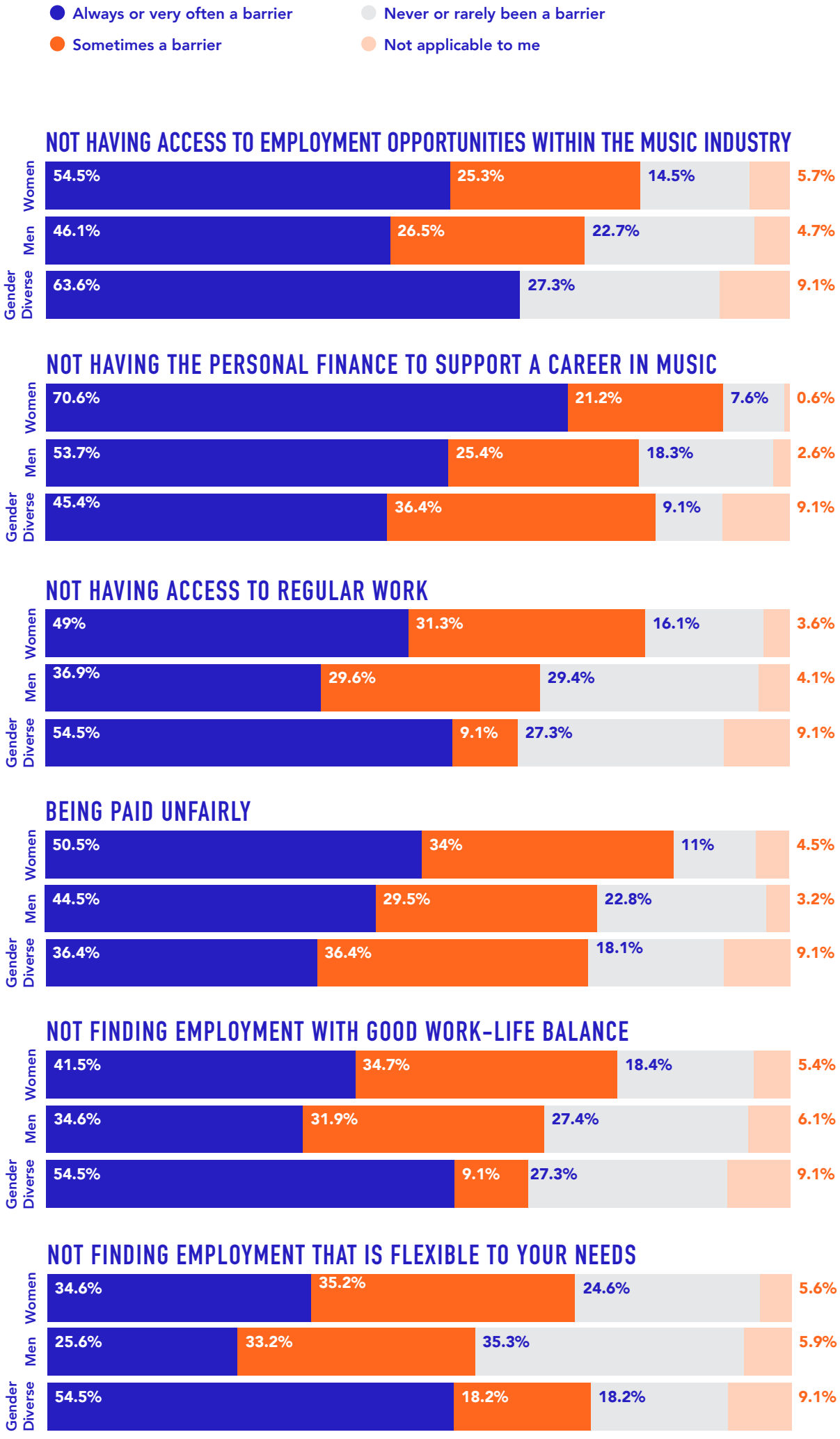
ALWAYS OR VERY OFTEN A BARRIER

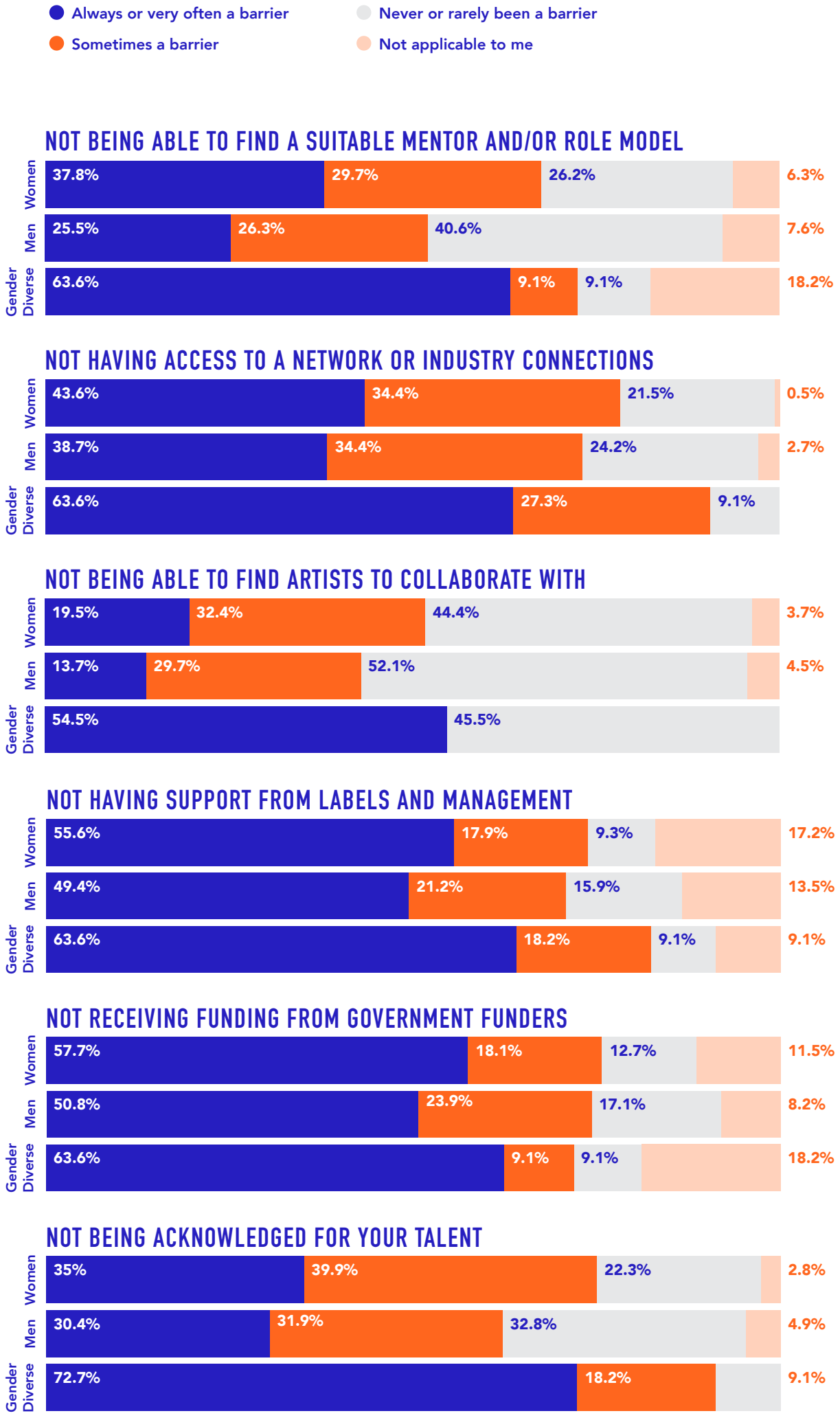
Not having access to training and education.

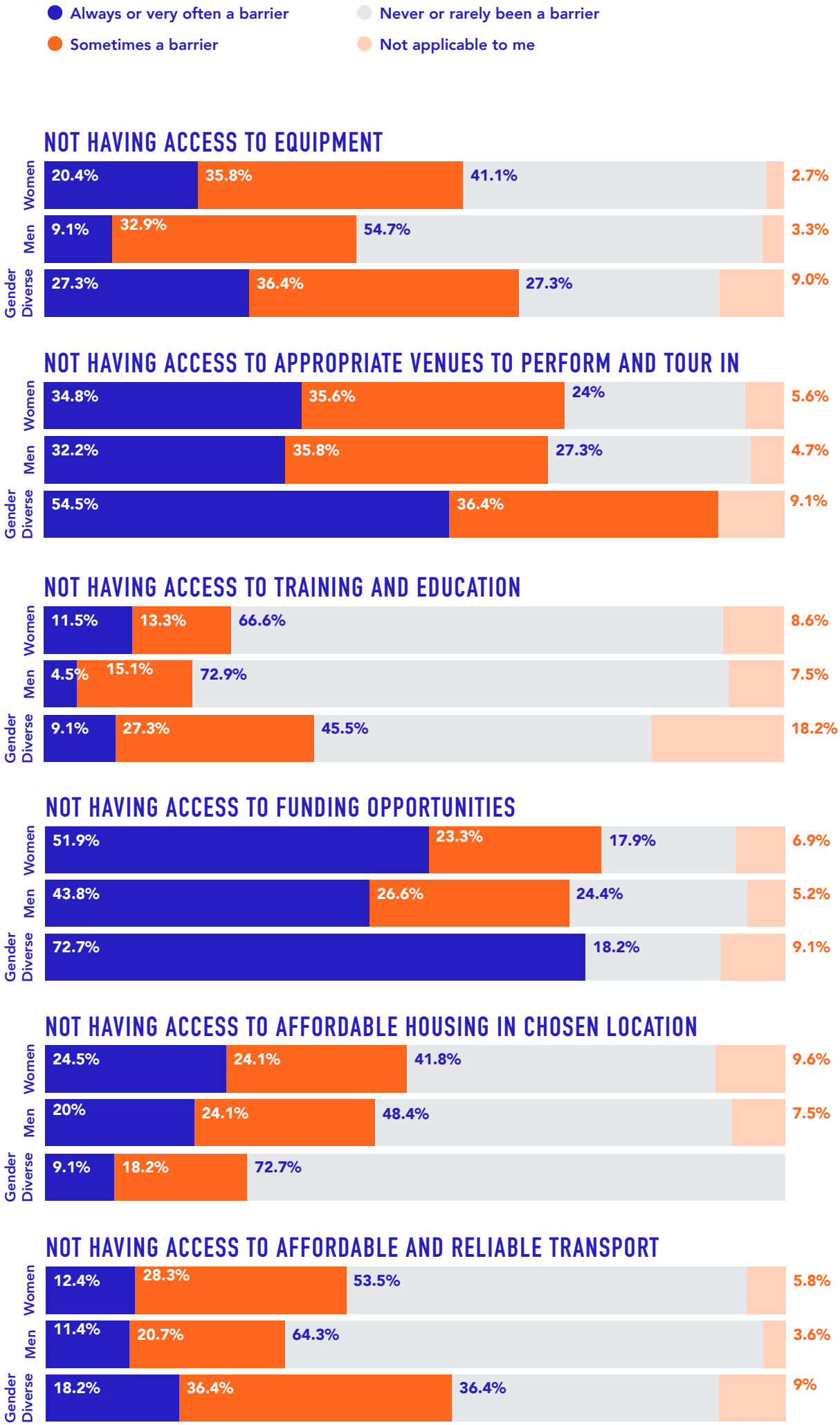
M 4.5% W 11.5%

TO WHAT EXTENT HAVE THE FOLLOWING BEEN BARRIERS FOR YOU PERSONALLY WHEN BUILDING YOUR CAREER IN THE NEW ZEALAND MUSIC INDUSTRY?




Always or very often a barrier
Sometimes a barrier
Never or rarely been a barrier
Not applicable to me
NOT HAVING ACCESS TO EMPLOYMENT OPPORTUNITIES WITHIN THE MUSIC INDUSTRY
Women 54.5% 25.3% 14.5% 5.7%
Men 46.1% 26.5% 22.7% 4.7%
Gender Diverse 63.6% 27.3% 9.1%
NOT HAVING THE PERSONAL FINANCE TO SUPPORT A CAREER IN MUSIC
Women 70.6% 21.2% 7.6% 0.6%
Men 53.7% 25.4% 18.3% 2.6%
Gender Diverse 45.4% 36.4% 9.1% 9.1%
NOT HAVING ACCESS TO REGULAR WORK
Women 49% 31.3% 16.1% 3.6%
Men 36.9% 29.6% 29.4% 4.1%
Gender Diverse 54.5% 9.1% 27.3% 9.1%
BEING PAID UNFAIRLY
Women 50.5% 34% 11% 4.5%
Men 44.5% 29.5% 22.8% 3.2%
Gender Diverse 36.4% 36.4% 18.1% 9.1%
NOT FINDING EMPLOYMENT WITH GOOD WORK-LIFE BALANCE
Women 41.5% 34.7% 18.4% 5.4%
Men 34.6% 31.9% 27.4% 6.1%
Gender Diverse 54.5% 9.1% 27.3% 9.1%
NOT FINDING EMPLOYMENT THAT IS FLEXIBLE TO YOUR NEEDS
Women 34.6% 35.2% 24.6% 5.6%
Men 25.6% 33.2% 35.3% 5.9%
Gender Diverse 54.5% 18.2% 18.2% 9.1%


Always or very often a barrier
Sometimes a barrier
Never or rarely been a barrier
Not applicable to me
NOT BEING ABLE TO FIND A SUITABLE MENTOR AND/OR ROLE MODEL
Women
37.8%
29.7%
26.2%
6.3%
Men
25.5%
26.3%
40.6%
7.6%
Gender Diverse
63.6%
9.1%
9.1%
18.2%
NOT HAVING ACCESS TO A NETWORK OR INDUSTRY CONNECTIONS
Women
43.6%
34.4%
21.5%
0.5%
Men
38.7%
34.4%
24.2%
2.7%
Gender Diverse
63.6%
27.3%
9.1%
NOT BEING ABLE TO FIND ARTISTS TO COLLABORATE WITH
Women
19.5%
32.4%
44.4%
3.7%
Men
13.7%
29.7%
52.1%
4.5%
Gender Diverse
54.5%
45.5%
NOT HAVING SUPPORT FROM LABELS AND MANAGEMENT
Women
55.6%
17.9%
9.3%
17.2%
Men
49.4%
21.2%
15.9%
13.5%
Gender Diverse
63.6%
18.2%
9.1%
9.1%
NOT RECEIVING FUNDING FROM GOVERNMENT FUNDERS
Women
57.7%
18.1%
12.7%
11.5%
Men
50.8%
23.9%
17.1%
8.2%
Gender Diverse
63.6%
9.1%
9.1%
18.2%
NOT BEING ACKNOWLEDGED FOR YOUR TALENT
Women
35%
39.9%
22.3%
2.8%
Men
30.4%
31.9%
32.8%
4.9%
Gender Diverse
72.7%
18.2%
9.1%


Always or very often a barrier
Sometimes a barrier
Never or rarely been a barrier
Not applicable to me
NOT HAVING ACCESS TO EQUIPMENT
Women
20.4%
35.8%
41.1%
2.7%
Men
9.1%
32.9%
54.7%
3.3%
Gender Diverse
27.3%
36.4%
27.3%
9.0%
NOT HAVING ACCESS TO APPROPRIATE VENUES TO PERFORM AND TOUR IN
Women
34.8%
35.6%
24%
5.6%
Men
32.2%
35.8%
27.3%
4.7%
Gender Diverse
54.5%
36.4%
9.1%
NOT HAVING ACCESS TO TRAINING AND EDUCATION
Women
11.5%
13.3%
66.6%
8.6%
Men
4.5%
15.1%
72.9%
7.5%
Gender Diverse
9.1%
27.3%
45.5%
18.2%
NOT HAVING ACCESS TO FUNDING OPPORTUNITIES
Women
51.9%
23.3%
17.9%
6.9%
Men
43.8%
26.6%
24.4%
5.2%
Gender Diverse
72.7%
18.2%
9.1%
NOT HAVING ACCESS TO AFFORDABLE HOUSING IN CHOSEN LOCATION
Women
24.5%
24.1%
41.8%
9.6%
Men
20%
24.1%
48.4%
7.5%
Gender Diverse
9.1%
18.2%
72.7%
NOT HAVING ACCESS TO AFFORDABLE AND RELIABLE TRANSPORT
Women
12.4%
28.3%
53.5%
5.8%
Men
11.4%
20.7%
64.3%
3.6%
Gender Diverse
18.2%
36.4%
36.4%
9%

NEXT STEPS

By reflecting the APRA AMCOS NZ membership, the findings in this report serve as an indication of how gender disparities may manifest throughout the Aotearoa/New Zealand music industry.

By pinpointing the specific areas with the greatest gender disparities, results from this research provide evidence-based insights that can be used for targeted intervention initiatives. We urge these areas to be considered by those working at all levels of our industry and music communities. We also hope that our results provide further impetus and support for the many individuals and organisations that are already advocating for change.

Though it is outside of our scope to propose or endorse specific strategies, our findings indicate that interventions should pursue the following outcomes:

1. **Better representation across all genres and roles**
2. **Safer environments where music is made and shared**
3. **Fairer access to resources, support networks, and opportunities**

Improvements in these areas will be good for everyone. The growing body of research into diversity and bias in the workplace shows that a combination of both cognitive and demographic diversity is good for business. Based on the findings presented in this report, much work needs to be done so that all members of our industry feel empowered to participate and contribute.

AREAS FOR FUTURE RESEARCH

In our initial analysis of the complete dataset from the Amplify Aotearoa: New Zealand Music Community Diversity Survey – which includes non-APRA AMCOS NZ members, as well as hundreds of qualitative responses – we have identified the following areas that could be investigated further:

1. **Our study showed that bias, disadvantage or discrimination based on age is an issue for men, women, and gender diverse people.** Age however, was experienced differently by women when examining career satisfaction, indicating that age is a complex issue that requires further interrogation.

2. **Instances of homophobia and transphobia were reported, in which non-hetrosexual and gender diverse respondents were denied performances in certain venues, and/or had negative experiences with audience members.** Survey results showed non-hetrosexual and gender diverse groups experienced high levels of bias, disadvantage or discrimination. However, the low number of survey participants represented in these populations mean these results are statistically unreliable, and further research is needed to comprehensively engage with the breadth of LGBTQIA+ and takatāpui experiences.

3. **Deaf and disabled performers with access needs reported that they were repeatedly unable to perform or engage in other industry-related activities due to a widespread lack of accessibility in venues.** Survey results showed Deaf and disabled individuals experienced slightly higher levels of bias, disadvantage or discrimination than non-disabled individuals, though not by a statistically significant margin. Further, access needs are also varied, and more research is needed to understand how disability impacts experiences in the music industry.

4. **Non-New Zealand European respondents report higher levels of racism.** In our survey results, 43.4% of Māori respondents reported experiencing bias, disadvantage or discrimination because of ethnicity compared to 7.8% of Pākehā, and 20% of Pacific Peoples. However, the low number of survey participants who identified within Pacific Peoples and other ethnicity demographics mean results in this area are limited, and further analysis here is needed.

5. **The odds of a respondent being satisfied with their music career were higher with the more income and involvement they had in the music industry.** Most participants said that they were satisfied with their music career to date (64.7%), while one-quarter said they were dissatisfied (24.9%), 9.3% said they were neither satisfied nor dissatisfied, and the remainder preferred not to say. Respondents who identified as New Zealand European reported higher rates of career satisfaction (67.0%) compared with those who identified as an ethnicity falling into the other ethnicities category (50.4%), indicating that career satisfaction and earning potential may intersect with ethnicity in ways not measured in this study.

METHODOLOGY AND SURVEY DESIGN

This research used a mixed-methodology approach that centred around an online survey that ran from October 22 to December 1 2019. The survey design was benchmarked against international studies, namely the Berklee Institute for Creative Entrepreneurship 'Women in the US Music Industry' survey in 2019, and the APRA AMCOS commissioned 'Australian Women Screen Composers: Career Barriers and Pathways' study in 2017, and adjusted relevant models for the Aotearoa/New Zealand context.

The survey was administered online through the Qualtrics platform, and was promoted via an email containing an embedded open survey link sent to all APRA AMCOS NZ members. The survey was further promoted through social media and other industry networks, and targeted songwriters and composers aged 16 and above who are registered with APRA AMCOS NZ. In recognising that many non-APRA AMCOS NZ members may wish to contribute, the survey also invited and screened responses by those working in other areas of the industry. The results represented in this report are drawn only from responses that disclosed that they were APRA AMCOS NZ members, as the membership database was used as a census for our statistical analysis.

In total 646 complete registered APRA AMCOS NZ survey results were collected from a total of 12,013 active email invitations that were successfully delivered. This equates to a participation rate of 5.3% of active members with an active email account on record. A total of 9 respondents opted not to disclose their gender, leaving 637 usable responses.

Our analysis applied post-stratification weights based on auxiliary age and gender information to ensure the results are representative of the APRA AMCOS NZ membership population. This method enables us to make observations that broadly reflect the entire membership. Responses from non-APRA AMCOS NZ members, while highly valuable, fell outside of the scope of this report, yet will feature in ongoing analysis of the entire dataset, and be shared with relevant sections of the industry.

The survey was structured around four key themes. These were derived from similar international studies, and developed through pre-survey testing with focus groups. Best practice in survey design (see Dolnicar 2013) was adhered to, including the balancing of ordinal scale optioning (bi-polar with a mid-point option), with 'don't know' and 'not applicable' options provided. The survey began with screener questions to ensure eligible respondents could be identified. These screener questions ascertained age, APRA AMCOS NZ membership, and if the respondent is active, or has been active within the music industry. The second section examined the type of work undertaken in the music industry. We asked what genres of music respondents performed, wrote, or composed for; the proportion of current income they make from music related activities, and the level of training they had undertaken. In the third section, issues around access and barriers to working in the Aotearoa/New Zealand music industry were examined via grid style questions, with attributes measured on 7-point Likert scales. A closed multiple choice list, developed from a study of APRA AMCOS members in Australia (Strong & Cannizzo 2017) was used to test for other barriers faced by those working in the Aotearoa/New Zealand music industry, including personal experience of bias, disadvantage or discrimination because of age, gender, ethnicity, sexual orientation, disability or other participant-inputted factors. We also surveyed participants' knowledge of others working in any role in the music industry who have experienced bias, disadvantage or discrimination, and sought qualitative responses on these topics. Finally, demographic questions sourced predominantly from Statistics NZ (StatsNZ 2019) asked for diversity estimates. Demographics collected via closed questions sought information on the region the respondent lived in, as well as their ethnic and gender identities, sexual orientation, and disability, as sourced from the Washington Disability Set (Washington Group on Disability Statistics 2016). The survey design also provided a forum for qualitative perceptions, experiences, and insights by inviting participants to write their own responses to questions. The median time taken to complete the survey was 13.8 minutes.

Once the survey closed, data was moved from Qualtrics to the analytical software R Studio, and ineligible surveys were removed, including incomplete surveys, surveys from those under 16 years of age (as per our ethical requirements), and for this report, non-APRA AMCOS NZ members. All responses were also anonymised. The lead researchers were provided with a bespoke interactive graph-generating tool, as well as statistical reports comprising key post-stratified results and logistic regression analysis. In consultation with APRA AMCOS NZ representatives, visualisations that compared men, women, and gender diverse responses were produced. Areas which have non-overlapping 95% confidence intervals, which indicate statistical disparities between women and men were also identified, and these underpinned our key findings.

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