

GENDER AND MUSIC GEAR EXPERIENCES REPORT

RESEARCH
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"I describe a lot of the music stores as a club that you only get to join if you're already in it."

Andy Mooney
CEO OF FENDER



If you are someone who is excited by music gear, you know how great it can feel to get a new instrument, pedal, synth, or other piece of gear-- to sit with it for hours as it inspires new musical ideas and helps you better express yourself. And... have fun!

But not everyone is able to experience the power and fun of music and gear in the same way. And not simply due to the pandemic.

Despite some much-needed shifts in recent years, jokes about hiding purchases from wives, lack of representation and mistreatment are still common in the music product industry, whether in-person or online. Many women and transgender people still feel ignored, underestimated, or objectified, fearing to try out instruments or ask questions, which could help them make decisions as consumers. Poor representation in marketing sends negative messages about their inclusion in the music industry as a whole.

This discomfort and discrimination is borne out in statistics about women's representation in music. In 2018, across all large festivals, only one quarter of acts featured a female performer or a band member who was female.¹ While it is an improvement over past years, only 23 percent of Grammy nominees in 2021 were women.² And, though women make up about one-third of musicians, many experience harassment in their roles.³ These numbers do not even begin to address the experiences for women of color and trans and non-binary musicians, for whom data is even sparser. Gender parity in the industry still has a long way to go.

Why is this important for business-owners in the industry?

Given the recent #MeToo, racial justice, and trans-rights movements, companies in the industry are feeling the push to create diverse, equitable, and inclusive workplaces where employees feel like they belong. Across industries, future and current employees will choose to work in companies who share their values, as represented in marketing, hiring, policies, and culture.⁴ With more customers buying and researching online, customers have choices and want to support companies who share their values, as represented in their marketing, hiring, policies, and culture.⁵ In addition, companies with more diverse management teams have 19 percent higher revenues due to innovation.⁶

In the music gear industry, this has been evidenced already. Fender's finding that 50 percent of new guitar buyers are women and their resulting marketing shift has been deemed a success by many, resulting in a sales boom (even pre-pandemic). On the other hand, companies who have been slower to catch up to calls for diversity have filed for bankruptcy or been pulled from major dealers.

While the "business case" for diversity is inherently flawed, it is clear that for companies who take this call seriously and make intentional moves in line with their values, there can be a real benefit-- for the company, but more importantly, for their customers, their employees, and the industry as a whole. However, those who choose to ignore it are doomed to be left in the past like a digital rack unit from 1991.

¹Mitchum and Garcia-Olano, 2018

²Dazed Digital, 2021

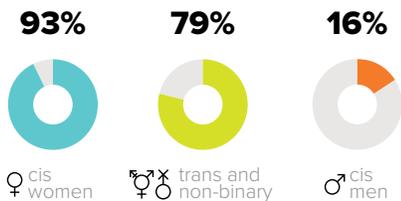
³Music Industry Research Association, 2019

⁴MetLife, 2017

⁵Accenture, 2018

⁶Boston Consulting Group, 2018

EXPERIENCED UNFAIR OR DIFFERENTIAL TREATMENT AS A RESULT OF GENDER IN A MUSIC STORE



GENDER AND MUSIC GEAR EXPERIENCES SURVEY

I created the Gender and Music Gear Experiences survey in order to learn about musicians' experiences with music gear, gender, and the relationship between the two. This information will be used to help those in the music gear industry-- dealers, manufacturers, those in online spaces-- to have a better understanding of these experiences and to better serve their customers and employees.

Results from 996 responses were in line with similar findings in other industries and demonstrate the importance of diversity in representation, hiring, customer relations, and product development. Below are key findings.

KEY FINDINGS

While **92.8%** of cis women and **78.9%** of trans and non-binary musicians report having experienced **unfair or differential treatment as a result of their gender in a music store**, only **16.3%** of cis men reported such an experience. This was particularly stark for cis women in urban areas and trans and non-binary respondents in rural areas in the US.

There were similar responses from participants when asked about **music gear social media**. Again, only **15.7%** of cis men responded that they have experienced this kind of **differential treatment**. This number increases significantly for other genders, as **82.3%** of cis women and **65.6%** of trans and non-binary people report having experienced this negative treatment.

Only **9.8%** of cis men responded that they have ever experienced **unwanted sexual comments** in a music store compared to **58.6%** of cis women and **40.5%** of trans and non-binary musicians.

Based on this data, it may be expected that cis women (music stores- 56.9%, from companies- 52.3%, and online- 43.6%), trans, and non-binary respondents (music stores- 56.6%, from companies- 57.9%, and online- 39.4%) **make purchasing decisions based on their treatment and marketing** of cis women, trans, and non-binary individuals. However, more than **one-third of cis men** also reported factoring this into their purchasing decisions, and **45.2%** use this **information** in making purchases from particular brands or companies.

Cis women (**57.1%**), trans and non-binary respondents (**50%**), and cis men (**28%**) called for an increase in **diversity in hiring as the biggest step companies could make towards change**.

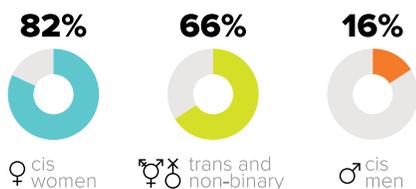
What Can You Learn From This Data?

An important follow-up question results from this data: How many times does someone need to have a negative experience in a space before they decide to no longer participate? Just one negative experience can be enough to turn someone off from a retailer, brand, or online space, or even music creation as a whole-- requiring significant effort and investment to win them back.

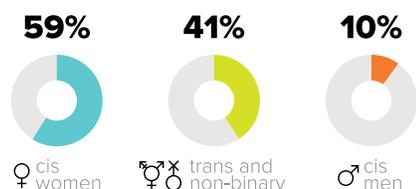
The results here also indicate that in-person retail experiences weigh more heavily than online retail experiences. This is key for brick and mortar retailers, as there is an opportunity for them to create a positive, supportive, collective and humanizing experience, setting them apart from what might feel like a more distant or isolated experience in online retail.

Especially for companies and brands, respondents indicated that they want to put their money where their values lie. Companies who are clear about their values and live them in their workplace, products, marketing, and social media, will be at an advantage in the future.

EXPERIENCED UNFAIR OR DIFFERENTIAL TREATMENT WITH MUSIC GEAR SOCIAL MEDIA



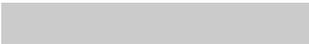
EXPERIENCED UNWANTED SEXUAL COMMENTS IN A MUSIC STORE



BELIEVE DIVERSITY IN HIRING IS BIGGEST STEP COMPANIES CAN MAKE TOWARDS CHANGE



45.2% of cis men reported making purchasing decisions from particular brands or companies based on their treatment and marketing of cis women, trans, and non-binary individuals.



What Can You Do Now?

As the pandemic has shifted and adjusted our experiences and expectations, changes in our industry are more important than ever. This research shows that despite recent shifts in music gear culture, there are many changes still to be made. The need for diversity in hiring is real for two major reasons:

- 1) it will shift gear culture as a whole and,
- 2) better representation will lead more cis women, trans, and non-binary individuals to feel like music and music gear are spaces for them.

Given the importance of inclusion and access for all in the industry as musicians, makers, and employees, there are several shifts companies can make to create better, more inclusive spaces.

While **hiring** is, rightly, the top concern for most, attracting cis women, trans, and non-binary workers can be a challenge for many companies. Attention to **outreach strategies, language in job descriptions, resume screening, interview processes, and onboarding** are important in breaking down barriers.

In addition, hiring these workers into a space where they currently do not exist **can pose challenges** such as tokenization, exclusionary practices, and policies that do not support their needs. As such, there are several steps that can help create the culture needed to retain these new workers, such as creating a **mission and values** that support this work, holding regular **diversity trainings** for current staff, and **creating policies** that reflect and respect the needs of all workers. To make a brand and space more welcoming to customers, it is important to put a spotlight on **product development, marketing, and customer service**.

As evidenced in these survey results, whether an online or brick and mortar music store, a music gear manufacturer, a recording studio, or a live venue, prioritizing these changes will help you create a more equitable and profitable company that will be ready for current and future challenges, changes, and opportunities in the music industry and beyond. As the world shifts with the pandemic, now is the time to perfect time to start.

Additional recommendations, resources, and the full report and methodology are available at hiliarybjones.com.

