Julie's Bicycle
SUSTAINING CREATIVITY

CREATIVE CLIMATE CENSUS

Attitudes and actions of **UK cultural leaders** on climate change and environmental sustainability

SUMMARY BY SECTOR: MUSIC

MARCH 2018

In partnership with Social Value Lab

Supported by Arts Council England (Supported using public funding by ARTS COUNCIL ENGLAND) Innovate UK Knowledge Transfer Network

MUSIC

Music businesses are the group that appears to be most engaged with where the energy they use is coming from: almost half of respondents (**45%**) are on a green tariff or buying energy from a 100% renewable energy supplier, compared to an average of one in three for other sectors.

ABOUT THE CREATIVE CLIMATE CENSUS

The Julie's Bicycle Creative Climate Census is the longest-running attempt to track the attitudes and behaviours of cultural decision-makers in response to climate change and environmental sustainability.

The first survey, published as the **Sustaining Creativity Survey** in May 2014, captured almost 370 responses. This second survey, undertaken in 2017, attracted 476 responses representing an estimated cumulative business turnover of £1.1 billion. Some of the questions were the same to allow us to track progress, but many were new in recognition of the new directions work and thinking are exploring. Together, these research results give us insights that, we hope, will inspire the sector to do more, with even greater commitment and creativity, and inform national and organisational policy and strategy decisions in order to build a comprehensively sustainable creative ecology.

The Executive Summary, Summary of Findings, Sector Summaries, Full Report and more information about the methodology and profile of responses can be found **here**. This research was undertaken in partnership with Social Value Lab.

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Nine in 10 respondents from music organisations and businesses consider environmental sustainability to be relevant to their organisational vision and mission.

However, this is not uniformly reflected in reported day-to-day actions. Only **57%**, or half, of responding organisations have an up-to-date environmental policy, by far the lowest of any group (in all other sectors, at least four in five organisations do). Only **60%** or three in five organisations measure their environmental impacts, compared to four in five or more for all other sectors.

This indicates a sector that is keen on action, but has not yet developed organisational frameworks for action. This group was one of the only to select 'organisational strategy' as one of their top three priority areas for investment in the next three years.

ACTION

57%

have an up-to-date environmental policy

60%

measure their environmental impacts

62%

have collaborated on environmental sustainability

45%

are on a green energy tariff or buying energy from a 100% renewable energy supplier

32%

have a green team or green champion

16%

generate their own renewable energy

ATTITUDES

90%

consider environmental sustainability to be relevant to their organisational vision and mission

55%

think environmental sustainability has become more important to their organisation over the last few years

58%

think environmental sustainability will become more important over the next few years

BENEFITS

75%

have experienced benefits from environmental actions

Primary drivers of environmental sustainability in the near future were identified as:

- The commitment of staff or senior management
- Reduced costs
- Mission or creative vision

Respondents identified the following as primary areas where they will dedicate additional time or money into environmental sustainability in the next three years:

- Day-to-day operations and efficiencies
- Waste management
- Organisational strategy

...and identified the following as their top three challenges:

- Capacity
- Accessing external funding
- Skills or knowledge

These are among the most commonly identified challenges for organisations looking to take action on environmental sustainability.

Music organisations identified the following as their top three support requirements:

- Skills or knowledge
- Accessing external funding
- Developing a business case for investing in environmental sustainability/allocating budget.

NOTE ON METHODOLOGY

Respondents were asked to categorise themselves according to which category most closely describes their work: Combined Arts, Dance, Design, Fashion, Literature / Spoken Word, Media/Broadcast/Film/TV, Museums & Heritage, Music, Theatre, Visual Arts.

16% of respondents identified themselves as working in Music.

Small percentage differences in actions and attitudes in behaviour between different sectors should be treated cautiously due to the relatively smaller sample once data is split in this way.

The top three priorities in each area are identified based on the number of respondents in each sector that chose them. Individual organisations within each sector may have different priorities.