Julie's Bicycle
SUSTAINING CREATIVITY

CREATIVE CLIMATE CENSUS

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

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

EXECUTIVE SUMMARY

The 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.

KEY FINDINGS

- More than four in five organisations (83%) have benefited from their environmental sustainability practice. Benefits range across financial, reputational and well-being indicators.
- Senior leadership is now driving action on environmental sustainability (whereas in 2014 initiatives were mainly being driven from the middle of organisations).

- The three top drivers are:
    - the commitment of staff or senior management;
    - reduced costs, and
    - compliance with regulations or funders.

- Audience demand is also a strong driver for organisations that do not receive public or grant subsidy.

- Climate change and environmental sustainability are creative catalysts, helping to animate new work, partnerships and cultural practice. **Three-quarters** of responding organisations are collaborating both within and beyond the sector.
- The sector does not always recognise or give itself credit for the incremental progress it is making.
- The scarcity of green suppliers and services able to match the quality and cost of ‘conventional’ suppliers and/or deliver to scale continues to limit environmental action. This is compounded by the complexity of assessing and comparing the sustainability credentials of different products and services.
- A lack of capacity and time remains, unsurprisingly, the highest cited challenge.

EXECUTIVE SUMMARY

RECOMMENDATIONS

from respondents to support the Creative Climate Movement

1. Development of a compelling shared vision and strategy for change for the cultural sector

2. More opportunities to share knowledge and network, which many consider essential

3. Development of collective procurement options for greener products and services, such as green energy, to be identified regionally and locally

4. Training, mentoring and skills development for individuals working in the industry, alongside support in finding the right partners for strategic and creative projects

5. Leadership voices, funders and policymakers to recognise their influence in shaping this work, helping to reinforce – including through funding - ambitious responses which

   - ensure that environmental issues are connected to, and not in conflict with other priorities such as audience development, diversity and new revenue streams
   - advocate for the role of the creative industries within the UK's low carbon economic growth strategy

EXECUTIVE SUMMARY

The responses[1] reflect a creative community that recognises environmental sustainability as core to strategic and creative decisions, not just an 'add-on'. However, this recognition is not yet translating equally across the sector, despite the growing evidence for the associated benefits.

Over the next few years Julie's Bicycle will help to consolidate the leadership from highly engaged organisations, building on their experiences so that the benefits and opportunities of action can be shared across the creative community. Simultaneously, we will continue to work with pioneering organisations to incrementally push the boundaries of what a low carbon, environmentally sustainable, creative ecology can look like.

Respondents repeatedly asked to work on a shared vision: Julie's Bicycle will start this work in 2018.

> *It's about massive amounts of tiny decisions and actions being embedded right across the organisation. We've developed a culture of sustainability from strategy down to tea bags!*

[1] Because of the voluntary nature of the survey, respondents are likely skewed towards those organisations that are more actively engaged with environmental sustainability.

METHODOLOY & PROFILE OF RESPONSES

A voluntary survey was distributed online in early 2017 to arts and creative businesses in the UK (including all of those who participated in the first survey in 2014). This was supplemented by six in-depth telephone interviews. Julie's Bicycle worked with Glasgow-based consultancy Social Value Lab to design the survey and collect and analyse the responses.

RESPONDENTS

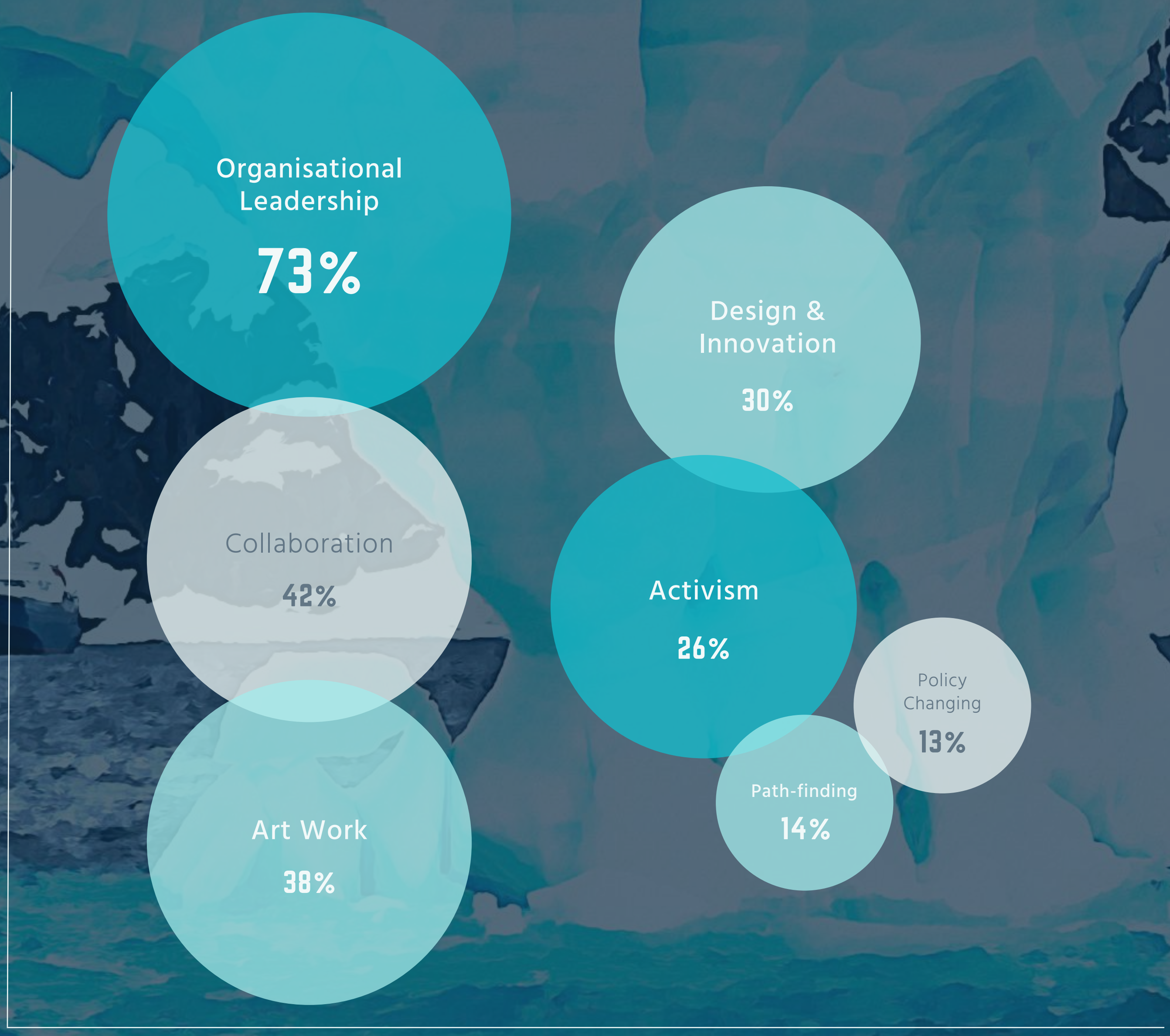
- We received 476 responses in 2017, compared to 370 in 2014.
- Responding organisations have a combined turnover of approximately £1.1 billion.
- Just over three-quarters (77%) of responding organisations report receiving some level of financial support from public funding.
- Most respondents are based in England, reflecting Julie's Bicycle's key reach.
- Over three-quarters of respondents are in senior or directorial positions.
- Responding organisations reported a relatively even spread of activities, including producing/publishing/releasing artistic or cultural work; operating a building or venue; promoting/producing festivals and events; touring, and funding, representing or developing the sector.

Because of the voluntary nature of the survey, respondents are likely skewed towards those organisations that are more actively engaged with environmental sustainability. For more detail on the methodology, respondent profile and results, please see the **full report**.

As part of the survey, we asked respondents which of the Seven Creative Climate Trends they identify with. The **Seven Creative Climate Trends** are a fluid framework created by Julie's Bicycle to help make visible the range and diversity of cultural responses to and action on climate change. As would be expected form a survey predominantly aimed at senior staff of creative organisations and businesses, most respondents identified with Institutional Leadership. However, all Seven Creative Climate Trends are represented among the responses, demonstrating the overlapping and dynamic nature of this space and the ways in which Institutional Leadership spills over into other areas.

7 TRENDS

Percentage respondents identifying with each of the Seven Creative Climate Trends



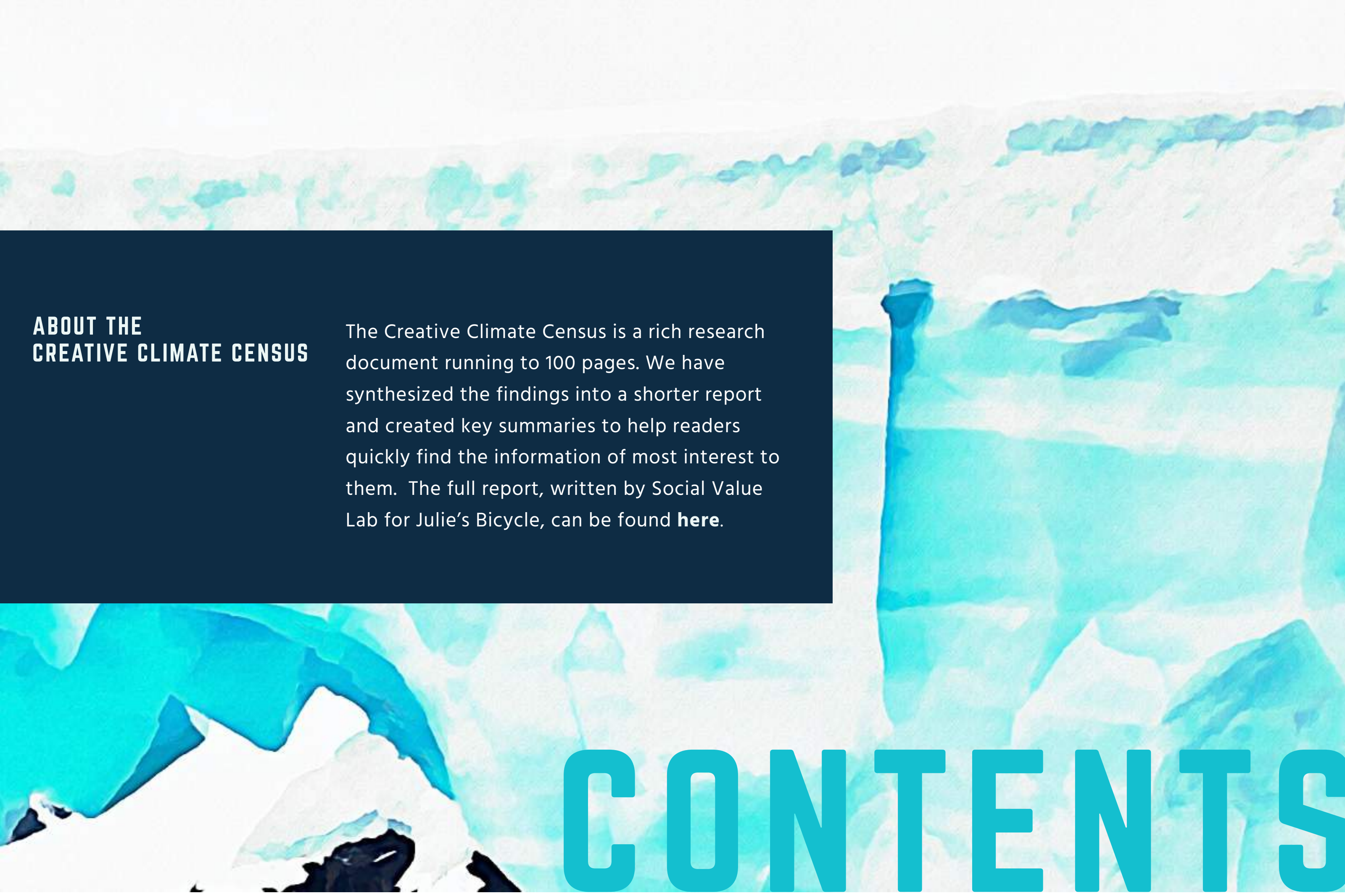
FOREWORD

The Creative Climate Census is both proof and plan. The responses so generously provided by the sector help evidence the changing nature of the creative community's relationship to environmental sustainability and action, making visible the tireless work of the many individuals building a creative ecosystem fit for the 21st century in a changed climate.

They also, perhaps more importantly, help point us towards where to go next: while many respondents identified the role of Julie's Bicycle in setting the agenda on climate change as invaluable, we can only do this well by having a deep understanding of the sector's needs, current status and priorities.

The findings of the Creative Climate Census will form a backbone to Julie's Bicycle's work over the coming two years. In response to the call for a collective and shared vision and action plan coming from its pages, we will be developing a 'Greenprint' for the arts and creative industries, tracing a pathway for the sector that is commensurate with our commitments under the Paris Agreement and the response demanded by our deteriorating environment.

ALISON TICKELL
CEO, Julie's Bicycle



ABOUT THE CREATIVE CLIMATE CENSUS

The Creative Climate Census is a rich research document running to 100 pages. We have synthesized the findings into a shorter report and created key summaries to help readers quickly find the information of most interest to them. The full report, written by Social Value Lab for Julie's Bicycle, can be found **here**.

CONTENTS

COMMENTARY & ANALYSIS OF KEY FINDINGS

1

SUMMARY OF KEY FINDINGS

DEEPENING ENGAGEMENT

Since the first survey in 2014, climate change and environmental sustainability have risen up the agenda of the creative sector, a trend that looks set to continue.

In 2014, action was primarily driven from the middle of organisations, representing the personal commitment of dedicated operational staff driving change. Over the past three years, senior decision-makers have become more actively involved. Action at operational level is increasingly reinforced by policy and strategy.

The breadth of responses received in 2017 compared to 2014 shows a deepening and more holistic engagement with sustainability: organisations exploring climate change in relation to values, in addition to the pursuit of efficiencies, reduction of impacts, programming, and increasing collaboration with others to achieve environmental goals. The findings reinforce many of the insights from 2014, but responses are more confident, imaginative and well informed. The rich detail of the responses demonstrates a genuine interest in environmental issues and action.

Although it was not ranked as highly as other priorities, environmental sustainability was stated to be a priority by **95% of respondents**.

> *Every programming, production, communications or administration decision we make is put through a rigorous sustainability test.*

> *I've been at [organisation] for fifteen years but it's really in the last 8-10 years that environmental sustainability has become a hugely important conversation and strategic concern.*

ACTION

Cultural organisations are continuing to manage – and reduce – their environmental impacts and for many this has become business as usual. Initiatives range from small day-to-day operations to significant capital investments, large-scale holistic strategies and national partnerships.

OF THE RESPONDENTS...

92%

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

79%

consider sustainability when making creative decisions

84%

have an up-to-date environmental policy

38%

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

48%

have a green team or green champion

15%

generate their own renewable energy

81%

measure their environmental impacts

94%

consider sustainability when selecting suppliers and service providers

80%

consider sustainability for building refurbishment or capital projects

70%

consider sustainability when making decisions about sponsors

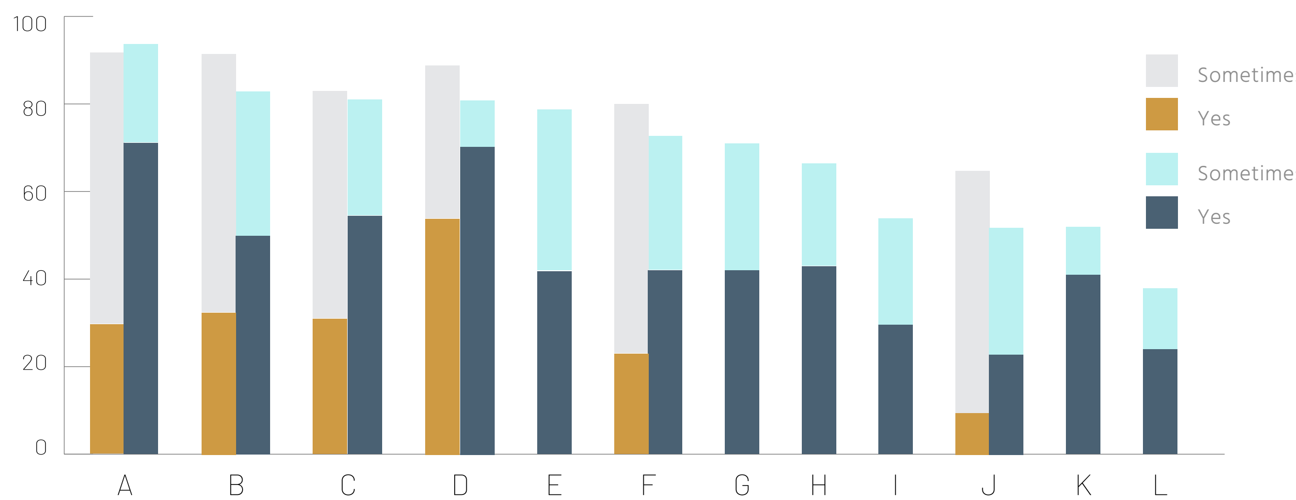
Actions by creative subsector

	COMBINED ARTS	DANCE	LITERATURE / SPOKEN WORD	MUSIC	MUSEUMS & HERITAGE	THEATRE	VISUAL ARTS
Consider environmental sustainability to be relevant to their organisational vision and mission	92%	84%	92%	90%	94%	93%	91%
Think environmental sustainability has become more important to their organisation over the last few years	51%	53%	50%	55%	44%	51%	69%
Think environmental sustainability will become more important over the next few years	60%	42%	42%	58%	83%	64%	69%
Have experienced benefits from environmental actions	80%	73%	75%	75%	94%	87%	84%
Have an up-to-date environmental policy	85%	95%	100%	57%	88%	89%	97%
Measure their environmental impacts	79%	83%	91%	60%	81%	93%	94%
Have collaborated on environmental sustainability	76%	63%	64%	62%	83%	79%	75%
Have a green team or green champion	51%	47%	27%	32%	65%	54%	41%
Are on a green energy tariff or buying energy from a 100% renewable electricity supplier	39%	18%	27%	45%	31%	34%	36%
Generate their own renewable energy	13%	11%	0%	16%	28%	18%	6%

Our survey shows that the creative sector is increasingly keen to align its practice with policymakers and local communities: **36% of environmental policies or action plans refer to specific emissions reductions or other targets that are based on international, national or local policies**.

There is clear evidence of an evolution of organisational strategies: respondents highlighted that environmental sustainability was now an embedded, overarching feature of strategic considerations and actions are becoming routine. In 2014, many organisations reported that they ‘sometimes’ considered environmental sustainability in decision-making whereas in 2017 more are now reporting that they routinely consider environmental sustainability for the same decisions.

Environmental actions reported 2017 vs. 2014



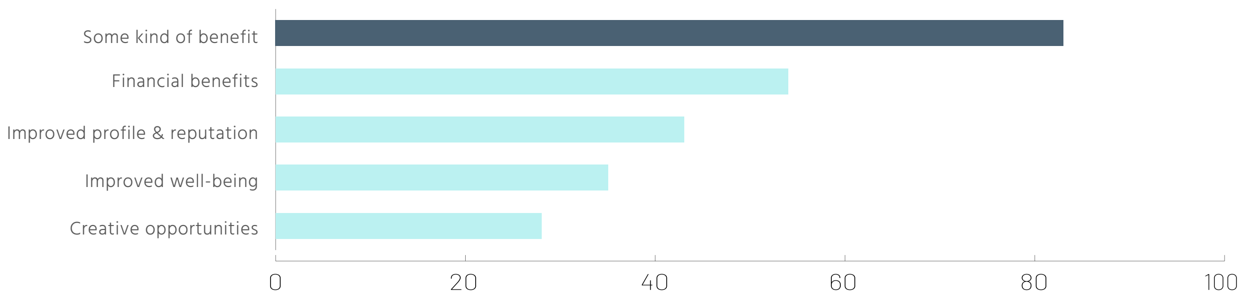
KEY TO ACTIONS

2014
2017

A	Consider sustainability when selecting suppliers and service providers
B	Consider sustainability when producing work or programmes (e.g. when sourcing materials to build exhibitions or stage sets)
C	Measure their environmental impacts
D	Consider sustainability for building refurbishment or capital projects
E	Consider sustainability when making creative decisions
F	Communicate their green activities externally
G	Consider sustainability when making decisions about sponsors
H	Consider sustainability when making investment decisions or choosing financial services
I	Engage artists and freelancers in environmental sustainability efforts
J	Create or commission work or programmes whose subject matter is environmental sustainability or related issues (e.g. staging a play about the impact of climate change)
K	Belong to networks or groups of organisations collaborating on environmental sustainability
L	Include environmental sustainability in job descriptions

BENEFITS

More than four in five organisations (**83%**) have experienced some benefit as a result of their environmental sustainability practices.



Around half have experienced financial benefits and almost half have experienced reputational benefits. The percentage of organisations reporting benefits has stayed relatively constant even as the number of respondents has increased between 2014 and 2017.

- Financial benefits are generally driven by energy and other operational efficiencies.
- Improved profile, reputation and well-being benefits include staff pride, happiness and retention.
- Creative benefits include opportunities for new partnerships, and sustainability prompting individuals and organisations to think in new ways, challenging established work or business practices, and sparking creative problem-solving.

> *We now use over 40% less electricity than we did 10 years ago and this provided us with a £67,000 saving in the last financial year alone.*

> *The creative opportunities come from talking about it, giving us a different way of working together and of making work.*

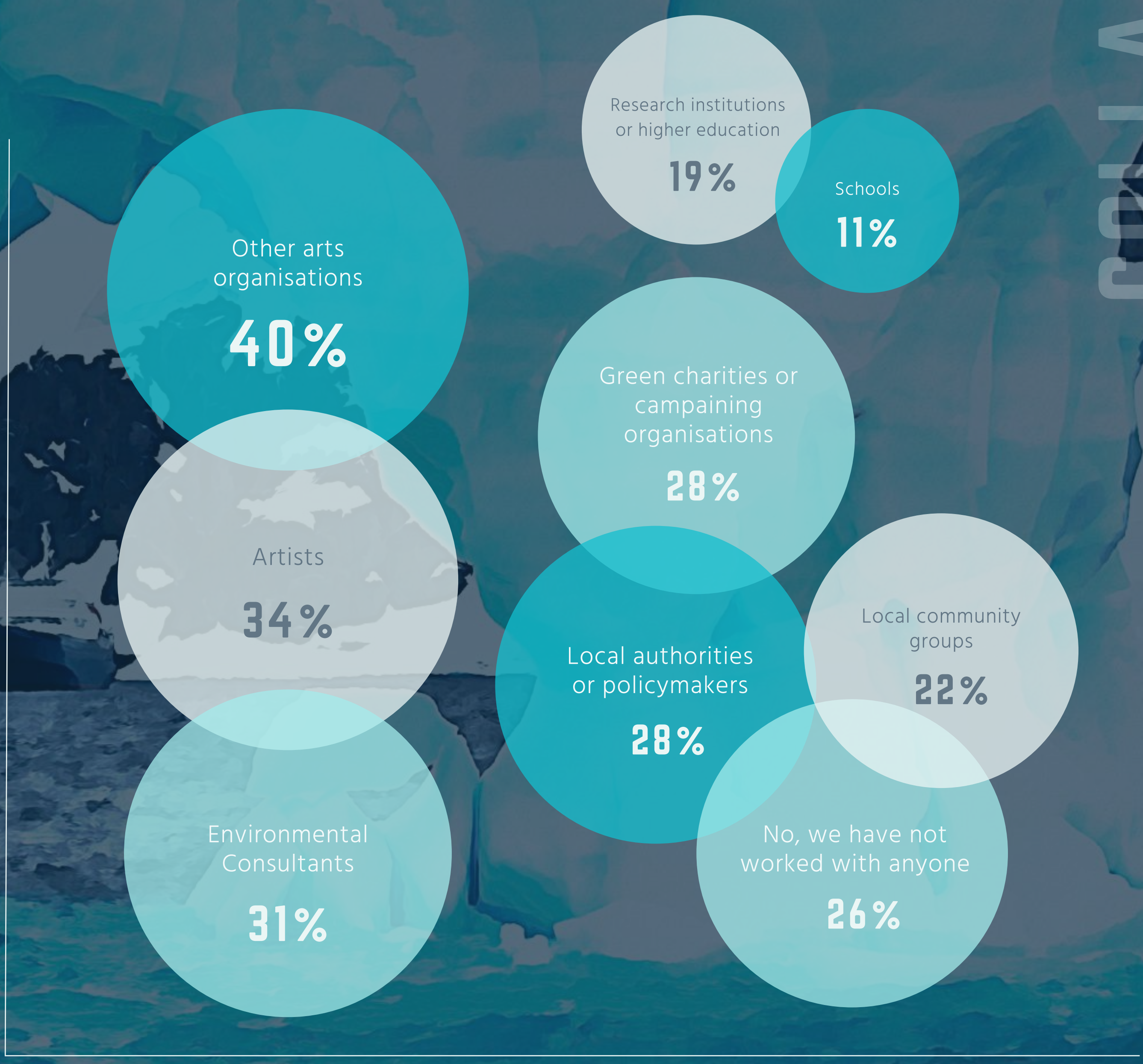
COLLABORATION & CREATIVE PROGRAMMING

The respondents paint a vibrant picture of collaboration prompted by environmental action around knowledge-sharing, outreach, inspiration and civic engagement. Three-quarters of organisations reported collaborating with other arts organisations, artists, environmental consultants, local authority or policymakers, green charities and campaigning organisations, local community groups, research institutions or higher education, and schools.

ENVIRONMENTAL SUSTAINABILITY

COLLABORATION

Percentage of respondents reporting collaborations with each group



The responses suggest environmental sustainability is a catalyst for arts organisations and creative businesses to find new partners beyond their usual collaborators, looking outwards towards their communities, different experts, new audiences and novel directions of work.

Census respondents detailed a wide range of creative work, programmes, performances, events and installations with environment and climate change as main themes. There is a strong educational strand running through many programmes. Organisations are also linking different dimensions of the audience experience, for example programming a show on environmental themes and serving locally sourced vegetarian food.

DRIVERS OF CHANGE

The three top reported drivers of environmental sustainability action are:

1. Commitment of staff or senior management
2. Reduced costs
3. Compliance with regulations or funders

> *There's a moral obligation but also practical considerations such as financial benefits and funding conditions.*

Mission or creative vision, creative and artistic opportunities, and partnership opportunities were also identified as strong drivers of change.

There is a divergence between organisations receiving public or grant funding and those receiving no subsidy. For organisations receiving no external funding, audience/visitor/consumer demand and opportunities for positive branding are noticeably stronger drivers of change than for funded organisations. Instead, compliance with regulation or funders and creative and artistic opportunities are weaker drivers for them.

There are two strands: a genuine concern for the global environment and cash.

Future drivers of environmental sustainability & level of subsidy reported by responding organisations

	LEVEL OF SUBSIDY REPORTED		
	NONE	<50%	>50%
The commitment of staff or senior management	67%	77%	77%
Reduced costs	55%	62%	51%
Compliance with regulation or funders	44%	53%	52%
Mission or creative vision	58%	51%	48%
Creative and artistic opportunities	40%	47%	54%
Partnership opportunities	51%	38%	53%
Audience/visitor/consumer demand	60%	37%	35%
Artists	39%	37%	38%
The commitment of trustees or parent body	32%	34%	38%
Opportunities for positive branding	52%	30%	34%
Investment opportunities	37%	29%	23%
Avoiding financial risk	34%	27%	29%
Avoiding potential reputational risks	26%	26%	35%
Peer pressure from within the creative community	17%	16%	19%

The 2014 findings concluded that compliance with funding conditions was a strong catalyst; the 2017 findings reinforce this. For more information, please see the special summary for funders and policymakers.

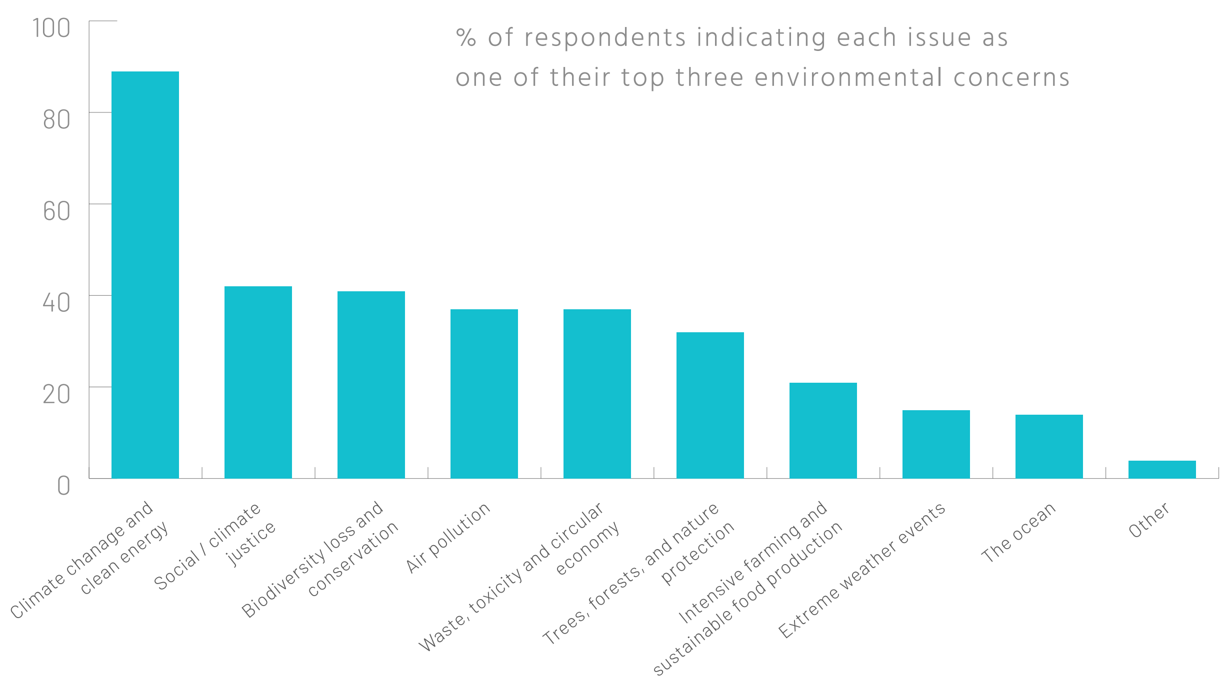
There's a moral obligation but also practical considerations such as financial benefits and funding conditions.

WHO IS DRIVING CHANGE IN ORGANISATIONS?

A majority of respondents – 68% – identified senior staff as the primary driving force, while acknowledging the contribution of operational staff (18%) and the board/trustees (10%). This is in contrast to 2014, where change was mainly being led from the middle of organisations.

WHAT ENVIRONMENTAL ISSUES DO SENIOR PROFESSIONALS IN THE ARTS & CREATIVE INDUSTRIES CARE MOST ABOUT?

When asked to identify their top three environmental concerns from a list of 10 issues, the majority (89%) of respondents chose 'climate change and clean energy', with other concerns more evenly distributed. Many commented on the difficulty of disentangling different issues, and that climate change exacerbates or drives most of the others.



CHALLENGES

Areas that respondents identified as being particularly challenging, or where initiatives have been less effective include:

- Not enough capacity
- Maintaining long-term commitment from a variety of stakeholders
- Instigating and/or sustaining behavioural change in staff and embedding actions into day-to-day operations
- Lack of control over/ability to adapt their physical working space, building, procurement processes, systems etc.

- Access to or availability of quality green services or products (because they are not available at the scale required, available in their geographic region, suitable for their specific needs, cost effective, etc.)
- Communicating a coherent story on environmental sustainability to staff and/or audiences
- Fashionable, ad hoc, tokenistic and short-term initiatives that were ill-devised or ill-prepared.

Financial viability – whether real or perceived – was also a challenge, with projects or actions not always meeting value-for-money thresholds. Additionally, the costs of retrofitting were highlighted by a number of respondents, reflecting that many arts organisations work in old and often listed buildings

> *We have tried to lower our energy consumption but we are in a Grade 2 listed building which is very difficult for us.*

> *It's not 'exciting' work – it's painstaking work regarding energy conservation in facilities which are not optimised in the first place for retrofitting.*

Organisations identified a lack of knowledge and/or available and accessible expertise as a challenge, compounded by sometimes misleading or complex information from suppliers and other external stakeholders.

> *I think sometimes due to lack of knowledge we think we're doing the right thing and it turns out it might not be – we've been bamboozled in the past by what seems to be an incredible lack of clarity from waste organisations – and we're not environmental professionals so it's hard to work out what the truth is about % of recycling when they tell us it's 98% and other people tell us it can't be.*

TRIAL AND ERROR AND INCREMENTAL CHANGE

Organisations reported that they had used a 'trial and error' approach with regards to environmental sustainability initiatives. This was in part due to a lack of clear information about what would work and what would not work. While some respondents were frustrated by this, others acknowledged that, as climate change and other environmental challenges are an ever-evolving issue, it was the only way to evolve sustainable practice: much in the same way that other changing business contexts require constant evolution.

PERCEPTIONS CAN BE DECEPTIVE

Environmental initiatives are often incremental, involving small steps over time, so that many organisations under-value their progress even as they are demonstrating excellent practice.

> *Nothing innovative or exciting; we just do what we can do.*

> *I don't think there has been anything particularly innovative, just incrementally improving our practice, sharing knowledge, having a holistic approach, and encouraging others we work with to do the same.*

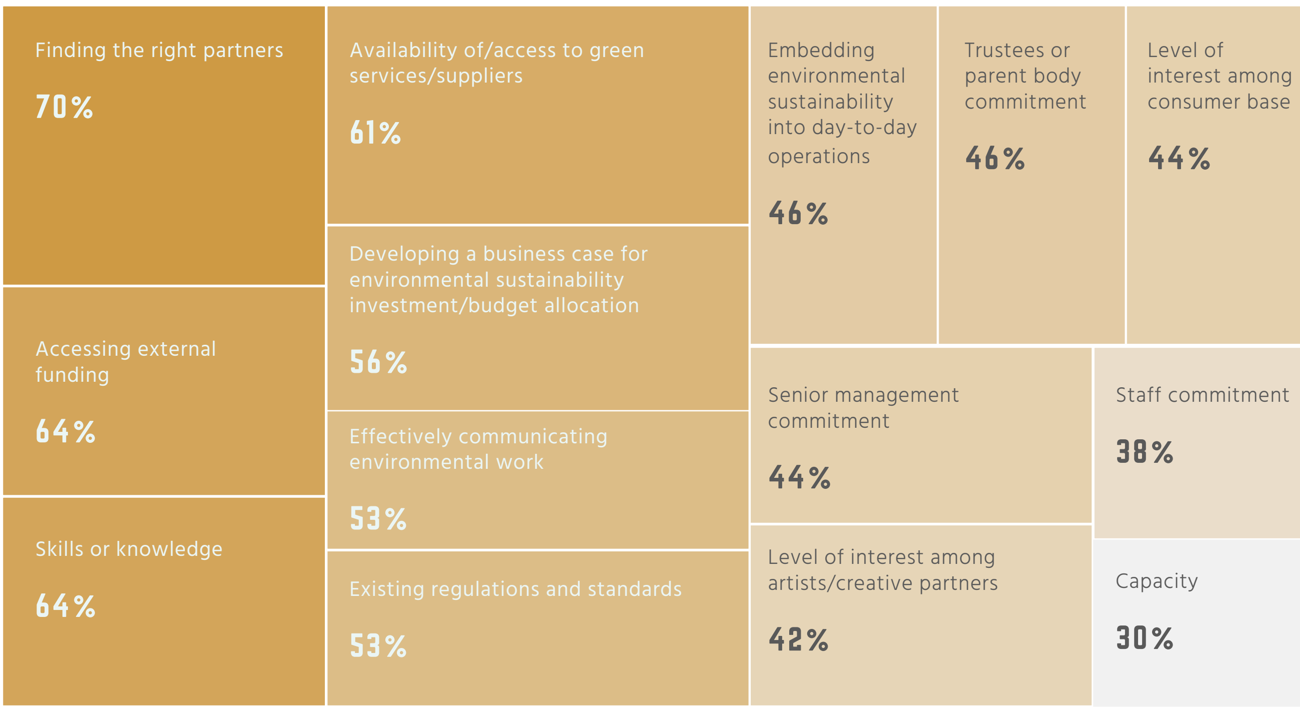
> *We have mostly followed the examples of case studies and work of other organisations to implement lots of small changes...so nothing particularly innovative or exciting but a good cumulative impact.*

SUPPORT

Organisations reported that external support was vital. Areas identified by respondents where specialist support is most beneficial include:

- Help to identify partners for strategic and creative activities
- Specialist skills or knowledge
- Help to identify and access sources of funding
- The availability of and access to quality green services and suppliers

Support requirements identified by the Creative Climate Census

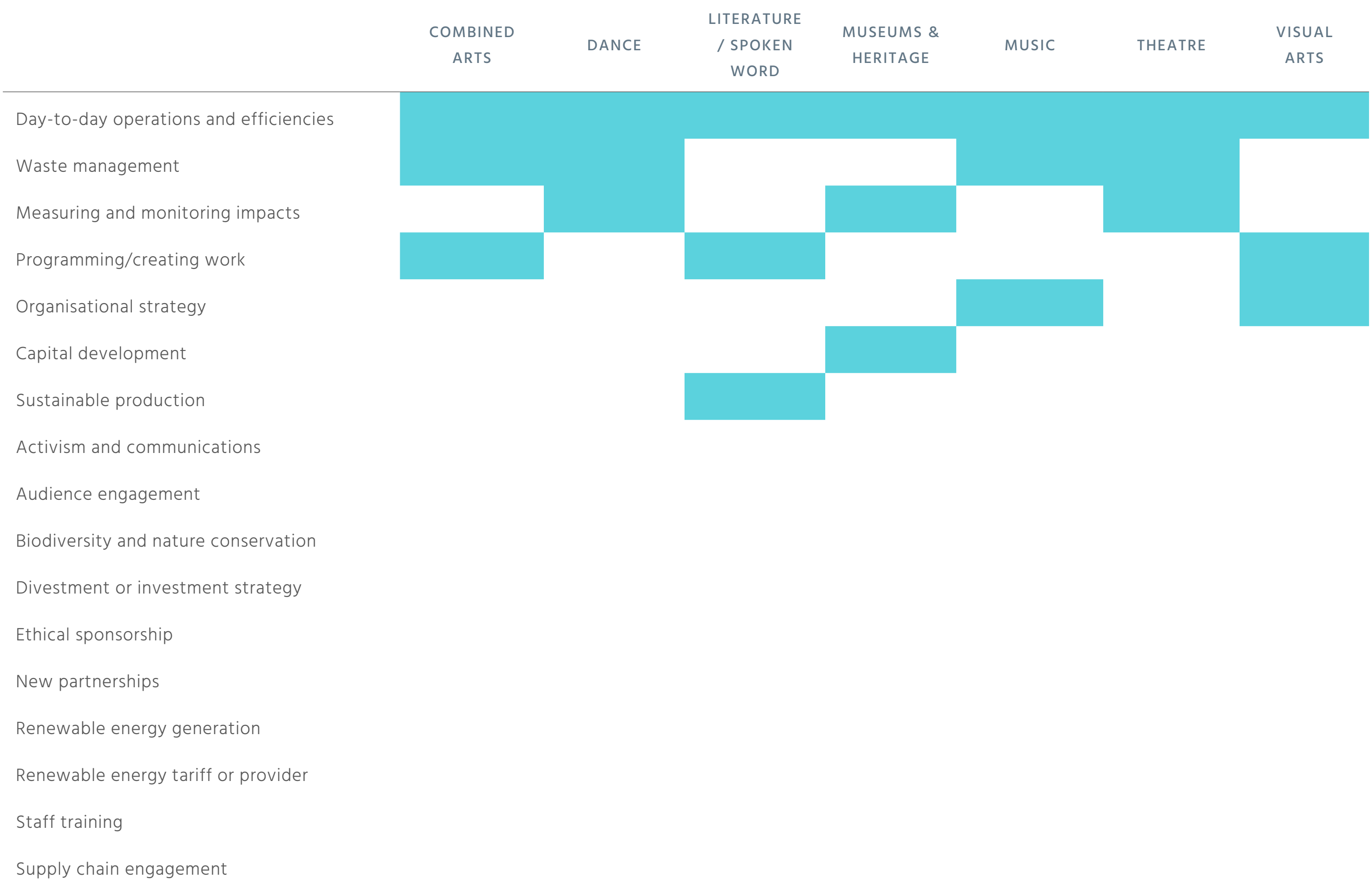


> *Access to free professional advice and funding for implementation.*

‘LESS WASTE, MORE CREATIVITY’: WHERE NEXT?

Across all areas of the creative community, day-to-day operations and efficiencies were identified as a priority for investment of money and time in the next three years.

Top three priorities for additional investment of money or time resources on environmental sustainability in the next three years



Beyond focusing on environmental sustainability goals in themselves, there are opportunities in identifying how environmental sustainability actions can support and mutually benefit core business priorities. The top priorities identified for the coming years across the sector are:

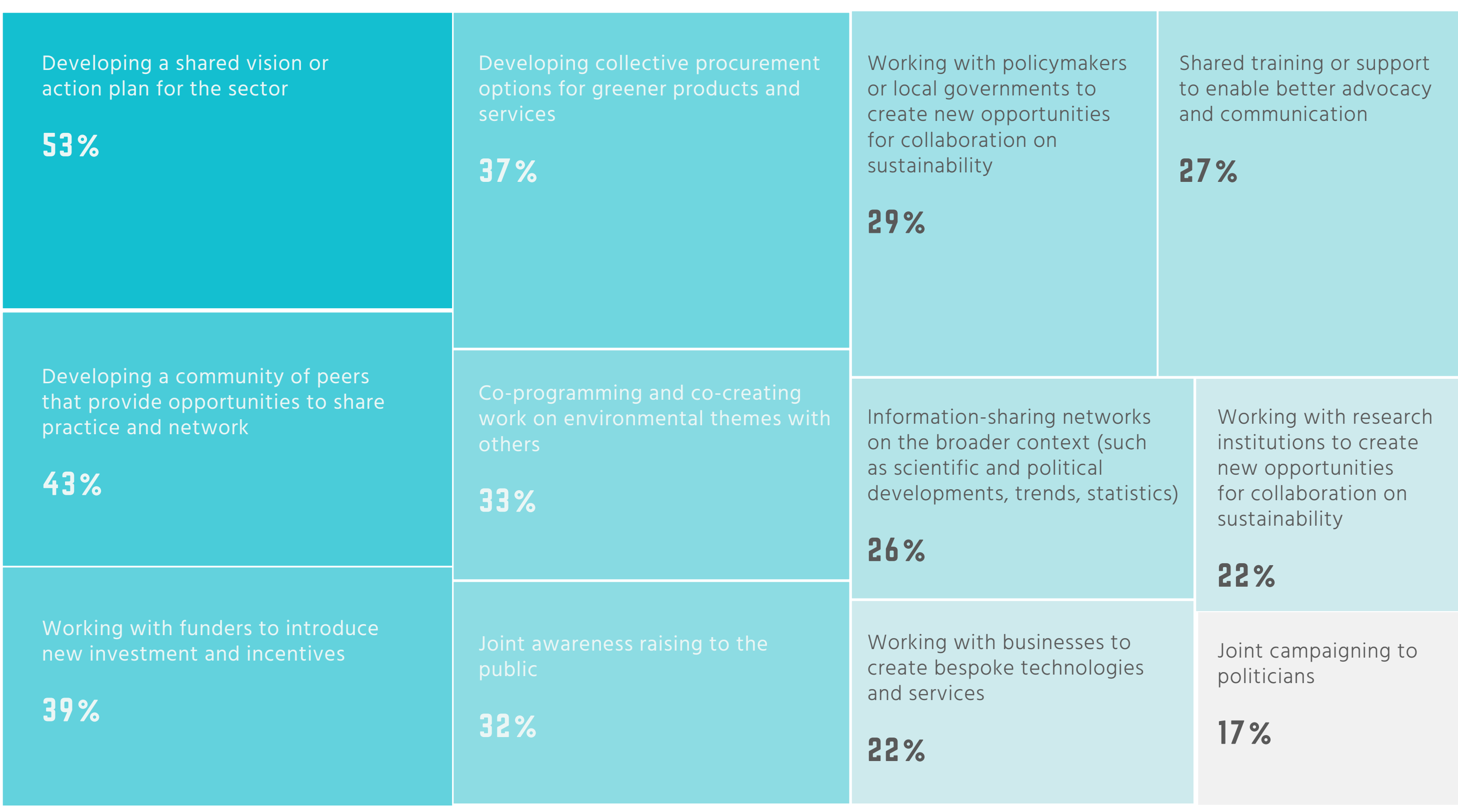
1. Developing audiences, visitors and consumers
2. Developing new sources of income
3. Developing creative work or programmes

COLLECTIVE ACTION & VISION

There is appetite for:

- Developing a shared vision or action plan
- Developing a community of peers to share practice and network
- Working with funders to introduce new investment and incentives
- Developing collective procurement options for greener products and services

Key collective actions identified by respondents to accelerate engagement with climate change across the cultural and creative sector



2

SUMMARY FOR FUNDERS & SECTOR DEVELOPMENT AGENCIES

The Creative Climate Census reinforces evidence that funding conditions and expectations set by arts councils, funding bodies and local authorities are changing behaviours across the sector. For many creative organisations, environmental sustainability will have increased in importance as a direct result of the importance attached to it by funders.

Along with potential and realised benefits, compliance has been fundamental at moving environmental sustainability from an ‘add-on’ to a routine consideration.

- Respondents identified compliance with regulations or funders as one of the top three drivers for action on sustainability, alongside the commitment of staff or senior managers, and reduced costs.
- Funders, through the types of requirements they integrate into their programmes, can shape the direction of environmental action among the organisations they support and therefore have a key role to play in setting priorities.
- Many organisations report how progress on environmental sustainability is made through an experimental, ‘trial and error’ approach. External funding can enable this kind of creative risk-taking, either through new or different ways of working or by supporting novel directions for programming and collaboration.
- Basic and light-touch requirements from funders can establish the conditions for further and deeper engagement around understanding, skills and creative programming.

> *Most valuable has been the steady and supportive encouragement from JB together with the gradually developing sophistication of the ACE relationship.*

RECOMMENDATIONS FOR FUNDERS AND SECTOR DEVELOPMENT AGENCIES

- Review different funding streams and mechanisms to ensure there is consistency on environmental conditions and expectations attached to funding.
- Better collaboration between different funders so there is greater consistency between environmental requirements and expectations.
- Communicate the range and scale of benefits experienced by organisations as a result of environmental action to help build out sustainability action from pioneering organisations for the benefit of the broader sector.
- Work with organisations to help evaluate the impact of environmental work and its relationship to other areas such as business resilience and audience development.
- Create funding programmes to match sector ambitions (and support organisations' ability to meet any funding requirements), especially in the areas of staff training and professional development; creative programming and partnerships; investment for efficiency (especially around energy).
- Support collaborative projects that cross over between creative/arts and science/environment that may not sit clearly or neatly within either funding stream.

KEY FACTS FOR FUNDERS

WHO ARE THE RESPONDENTS & WHERE DOES THEIR INCOME COME FROM?

A little over **three-quarters** (77%) of responding creative organisations reported receiving some level of financial support from public funding:

How much of your income comes from public sector grants or funding?

NONE	23%
<50%	46%
>50%	31%

Half of organisations receiving funding from public sector grants or trusts and foundations report that this is dependant on environmental requirements of some kind:

If you receive funding from public sector grants or trusts and foundations, does this come with any conditions on environmental sustainability?

YES	55%
NO	45%

WHAT TYPES OF CONDIITONS ON ENVIRONMENTAL SUSTAINABILITY ARE ORGANISATIONS REPORTING?

The main environmental sustainability funding conditions and expectations identified by respondents were:

- Arts Council England and other arts councils environmental reporting requirements
- Local authority or city council requirements and operating conditions
- Compliance with national policy or law.

[There are] expectations that we will work towards becoming more environmentally sustainable delivering on [Arts Council England] Goal 3, and the requirement to report through JB.

We are an ACE NPO so are (happily) required to work with Julie's Bicycle.

Compliance with the Well-being of Future Generations (Wales) Act.

Creative Carbon Scotland's Environment Connecting Theme requires use to measure and report out carbon emissions (from utilities, waste, and travel/ transport) and 'influence the wider public.

Oxford City Council worked with JB and its funded cultural partners to ensure that environmental sustainability is worked in Service Level Agreement. Funds only released if Environmental Policy, Action Plan, and reporting in place.

Respondents also raised inconsistencies in how funders are integrating environmental requirements, for example:

ACE funding does, HEFCE central funding to the University does. HEFCE special funding for museums and galleries doesn't.

Several respondents thought existing requirements did not go far enough:

Funders should use more sticks as well as the existing encouragement.

Make it a condition of funding that an agreed % is ring-fence for reaching environmental aims.

WHAT TYPE OF ACTION ARE ENVIRONMENTAL CONDITIONS ON FUNDING DRIVING?

Environmental conditions on funding are demonstrably driving action among organisations receiving subsidies. In this group, noticeably more organisations are measuring their environmental impacts, reflecting the specific conditions in programmes such as Arts Council England's environmental reporting programme. Organisations receiving some level of subsidy are also generally more likely to consider sustainability when producing work or programmes, and more of them create or commission work on environmental themes.

Conversely, organisations receiving high levels of subsidy are less likely to belong to networks or groups of organisations collaborating on environmental sustainability.

Environmental sustainability actions & level of subsidy reported by responding organisations

	LEVEL OF SUBSIDY REPORTED		
	NONE	<50%	>50%
Consider sustainability when selecting suppliers and service providers	89%	95%	94%
Measure their environmental impacts	61%	88%	86%
Consider sustainability when producing work or programmes (e.g. when sourcing materials to build exhibitions or stage sets)	64%	86%	89%
Consider sustainability for building refurbishment or capital projects	76%	86%	73%
Communicate their green activities externally	64%	79%	75%
Consider sustainability when making creative decisions	70%	79%	84%
Consider sustainability when making decisions about sponsors	55%	71%	78%
Consider sustainability when making investment decisions or choosing financial services	58%	65%	68%
Engage artists and freelancers in environmental sustainability efforts	49%	61%	50%
Create or commission work or programmes whose subject matter is environmental sustainability or related issues (e.g. staging a play about the impact of climate change)	38%	56%	53%
Belong to networks or groups of organisations collaborating on environmental sustainability	57%	56%	45%
Include environmental sustainability in job descriptions	32%	46%	32%

WHAT IMPACT ARE ENVIRONMENTAL CONDITIONS ON FUNDING HAVING?

Relatively light-touch requirements are having an impact on attitudes and how organisations are relating to environmental sustainability. Many organisations reported that they are building on funding conditions to set their own programmes, targets and initiatives. This demonstrates how agenda-setting from policymakers can fuel ambition throughout the sector.

> *Learning on creating an action plan and policy which was not in place, and reporting. This has led to us taking into consideration our impact on the environment and environmental sustainability.*

> *The Arts Council require us to maintain and develop our environmental sustainability policy and action plan. Furthermore in 2016-17 we have received funds which specifically enable us to improve the environmental sustainability performance of our premises.*

WHAT IS DRIVING ENVIRONMENTAL ACTION, AND HOW MIGHT FUNDERS SUPPORT THIS?

The sector identified 'help to identify sources of creative and green funding' as one of the main areas in which specialist support would be beneficial. Funders and policymakers and/or sector development bodies wishing to support sustainability action could therefore play a facilitating role in clearly signposting possible areas of funding for environment-related work.

The main drivers of environmental sustainability action in the coming years identified among organisations receiving some kind of public or grant funding include:

- The commitment of staff or senior management
- Creative and artistic opportunities
- Reduced costs
- Partnership opportunities

These are areas of opportunity for funders wishing to drive further environmental action, and we recommend funders develop programmes and funding streams to support:

- Staff training and professional development
- Creative programming and partnerships
- Investment for efficiencies (especially around energy)

Convincing commissioning bodies and arts partners and academic partners that environmental sustainability is of such vital importance and the drivers behind it are sincere [is a challenge].

Future drivers of environmental sustainability & level of subsidy reported by responding organisations

	LEVEL OF SUBSIDY REPORTED		
	NONE	<50%	>50%
The commitment of staff or senior management	67%	77%	77%
Reduced costs	55%	62%	51%
Compliance with regulation or funders	44%	53%	52%
Mission or creative vision	58%	51%	48%
Creative and artistic opportunities	40%	47%	54%
Partnership opportunities	51%	38%	53%
Audience/visitor/consumer demand	60%	37%	35%
Artists	39%	37%	38%
The commitment of trustees or parent body	32%	34%	38%
Opportunities for positive branding	52%	30%	34%
Investment opportunities	37%	29%	23%
Avoiding financial risk	34%	27%	29%
Avoiding potential reputational risks	26%	26%	35%
Peer pressure from within the creative community	17%	16%	19%

3 SUMMARY BY SECTOR

PHOTO Students of the Foundation and BA Hons Degree in Circus Arts at the National Centre for Circus Arts (Photo by Bertil Nilsson)

COMBINED ARTS

Combined Arts organisations represent a varied range of activities, from running venues/buildings to street arts and circus organisations. Along with Literature / Spoken Word, they identified creative and artistic opportunities as a primary driver of environmental sustainability going forward.

ACTION

85%

have an up-to-date environmental policy

79%

measure their environmental impacts

76%

have collaborated on environmental sustainability

39%

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

51%

have a green team or green champion

13%

generate their own renewable energy

ATTITUDES

92%

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

51%

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

60%

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

BENEFITS

80%

have experienced benefits from environmental actions

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

- Creative and artistic opportunities (such as creative partnerships, specific funding calls, etc.)
- The commitment of staff or senior management
- Reduced costs

Compliance, which was identified as one of the primary drivers by most other subsectors, was not identified by this group as a top three driver of change.

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
- Programming/creating work
- Waste management

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

- Capacity
- Accessing external funding
- Embedding environmental actions into day-to-day operations

Combined Arts organisations identified the following as their top three support requirements:

- Accessing external funding
- Skills or knowledge
- Availability of/access to appropriate green services and suppliers

NOTE ON METHODOLOGY

Respondents were asked to define 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.

32% of respondents identified themselves as working in Combined Arts, the largest of any respondent group, perhaps reflecting the wide range of activities covered under the term.

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.

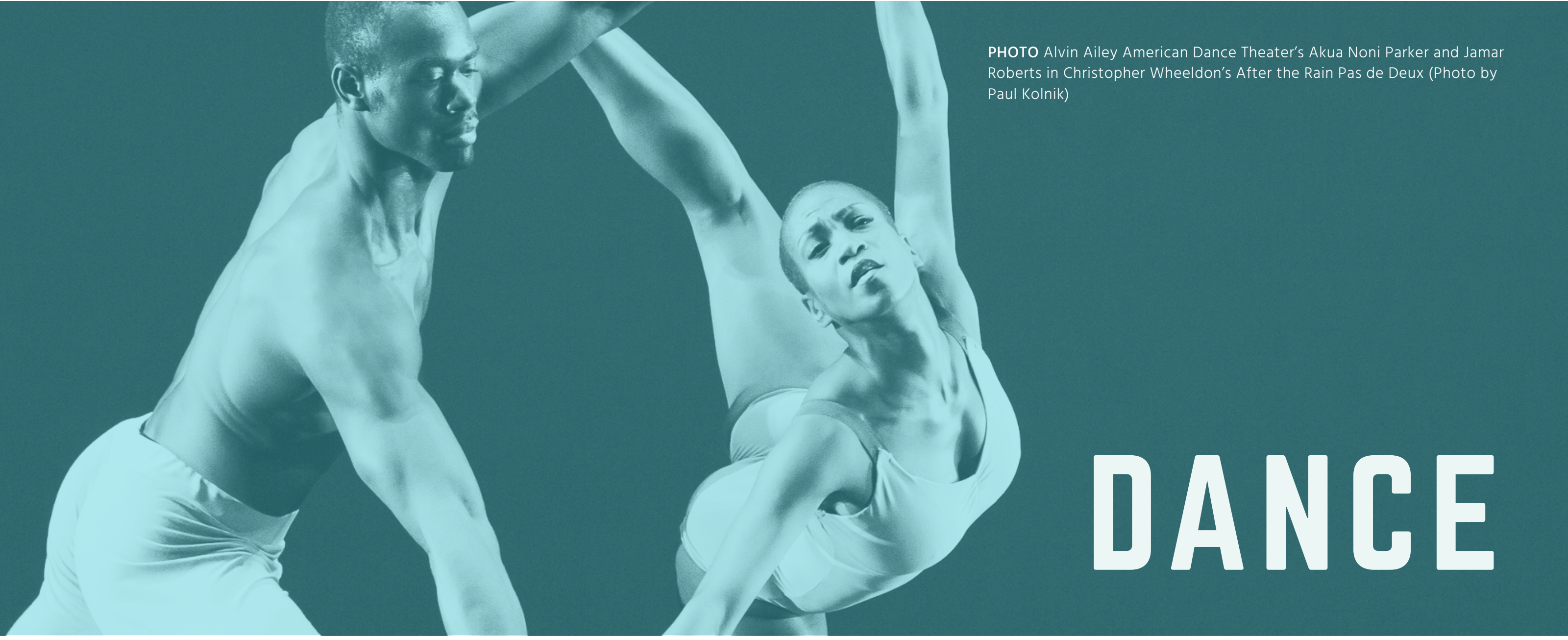


PHOTO Alvin Ailey American Dance Theater's Akua Noni Parker and Jamar Roberts in Christopher Wheeldon's After the Rain Pas de Deux (Photo by Paul Kolnik)

Respondents from Dance organisations were the least likely to consider environmental sustainability to be relevant to their organisational vision and mission, however at **84%** this still means that four in five respondents *do* consider it relevant.

Only **42%** of Dance respondents thought that environmental sustainability will become more important over the next few years – the joint lowest along with Literature / Spoken Word.

This slightly less enthusiastic attitude may reflect the make-up of sector respondents, many of which are small organisations with little control over their own spaces. However, it is counterbalanced by a relatively high level of day-to-day action, with **95%** of respondents reporting that they have an up-to-date environmental policy, and **83%** measuring their impacts.

Three in four organisations reported benefits from environmental actions. This is the lowest of any subsector alongside Literature / Spoken Word (which may also contribute to the relatively low percentage of respondents who think environmental sustainability will become more important), but still well over half.

ACTION

95%

have an up-to-date environmental policy

83%

measure their environmental impacts

63%

have collaborated on environmental sustainability

18%

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

47%

have a green team or green champion

11%

generate their own renewable energy

ATTITUDES

84%

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

53%

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

42%

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

BENEFITS

73%

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
- Compliance with regulations or funders
- Reduced costs

These were among the most commonly identified drivers of environmental sustainability.

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
- Measuring and monitoring of impacts
- Waste management

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

- Capacity
- Developing a business case for investing in environmental sustainability/allocating budget
- Level of interest among audiences/visitors/consumers

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

- Skills or knowledge
- Accessing external funding
- Finding the right partners

Dance organisations were the **only group to identify 'finding the right partners' as one of their top three support requirements**. This indicates that the sector might benefit from increased networking opportunities with like-minded organisations.

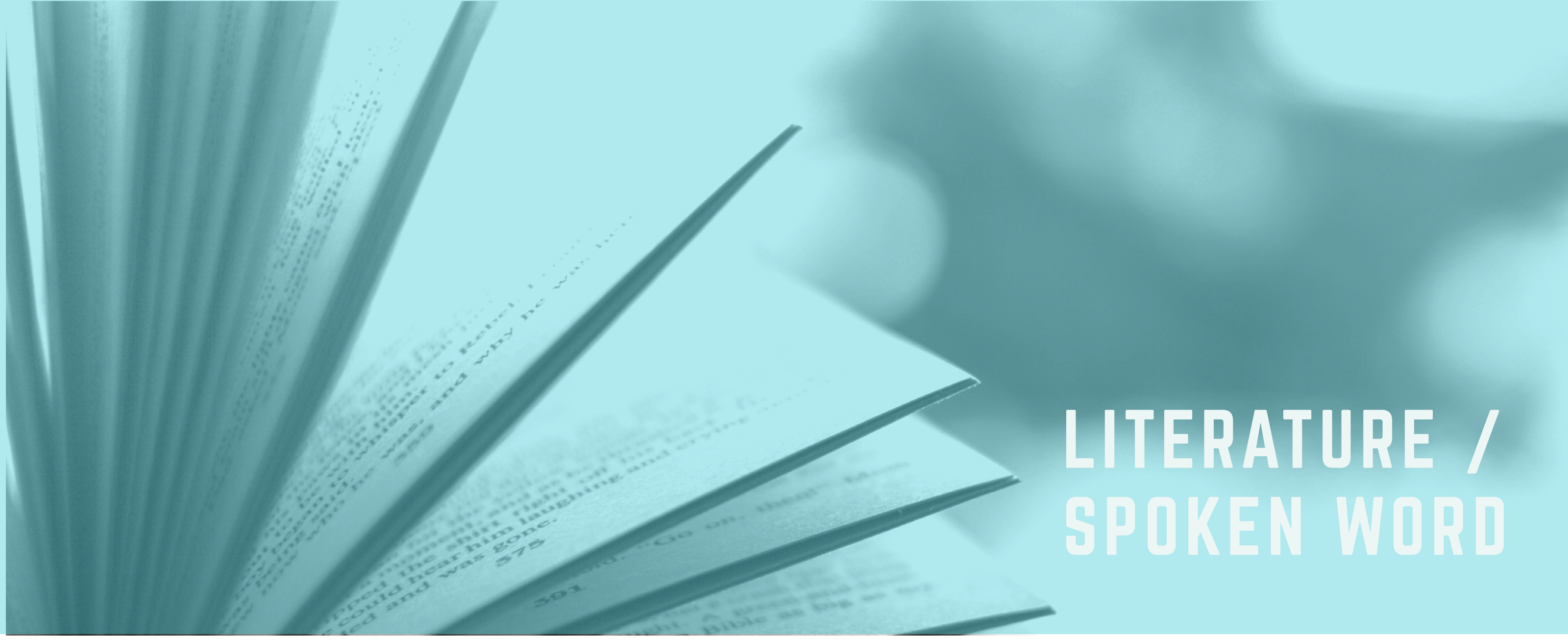
NOTE ON METHODOLOGY

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.

6% of respondents identified themselves as working in Dance.

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.



LITERATURE / SPOKEN WORD

All Literature / Spoken Word organisations reported having an up-to-date environmental policy (**100%**), the highest among any group.

However, only **42%** of respondents think that environmental sustainability will become more important over the next few years – the joint lowest along with Dance.

While there are relatively high levels of day-to-day action, no Literature / Spoken Word organisations reported that they are generating their own renewable energy – the only group not to have at least some organisations with this capacity. Only **27%** of Literature / Spoken Word organisations are on a green tariff or buying energy from a 100% renewable energy supplier, the second lowest of any group (only higher than Dance). These figures may reflect that most of the organisations in this group are small and have little control over their own spaces.

Three in four organisations reported experiencing benefits from environmental actions. This is the lowest of any subsector alongside Dance (which may also contribute to the relatively low percentage of respondents who think environmental sustainability will become more important over the next few years), but still well over half.

The sector was very responsive to its audiences. It identified audience demand and creative opportunities as key future drivers for environmental sustainability, was the only group to identify raising the level of interest among audiences/visitors/consumers as a key area for support, and was one of the only groups to call for joint awareness-raising to the public as a collective action for the cultural and creative sector and for more opportunities to co-programme and co-create work on environmental themes with others.

This group was also one of the only two (alongside Visual Arts) to identify programming/creating work as a key area for investment of resources into environmental sustainability over the next three years. This may reflect that this is where respondents feel they are able to make the biggest impact.

ACTION

100%

have an up-to-date environmental policy

91%

measure their environmental impacts

64%

have collaborated on environmental sustainability

27%

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

27%

have a green team or green champion

0%

generate their own renewable energy

ATTITUDES

92%

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

50%

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

42%

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:

- Creative and artistic opportunities (such as creative partnerships), etc.
- Compliance with regulations or funders
- Audience/visitor/consumer demand

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
- Programming/creating work
- Sustainable production

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

- Capacity
- Skills or knowledge
- Developing a business case for investing in environmental sustainability/allocating budget

Literature / Spoken Word organisations identified the following as their top three support requirements:

- Skills or knowledge
- Developing a business case for investing in environmental sustainability/allocating budget
- Level of interest among audiences/visitors/consumers

Literature / Spoken Word organisations were the only group to identify 'level of interest among audiences/visitor/consumers' as one of their top three support requirements, indicating that while the sector is interested in creating more work with environmental or climate change themes, there is a confidence gap in how to articulate and present this to its audiences.

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.

4% of respondents identified themselves as working in Literature / Spoken Word.

Small percentage differences in actions and attitudes in behaviour between different sectors should be treated cautiously due to the relatively smaller sample since 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.

PHOTO Manchester Art Gallery (Photo courtesy of Manchester Climate Change Agency)

MUSEUMS & HERITAGE

Almost all Museums & Heritage organisations consider environmental sustainability to be relevant to their organisational vision and mission (**94%**).

Additionally, **83%** or four in five think environmental sustainability will become more important over the next few years – by far the highest proportion of any respondent group (the next highest is Visual Arts at **69%**).

This may be because in the context of a changing climate, museums in particular are having to re-examine their role as custodians, and what it means to strike a balance between preserving the past for preservation's sake, and preserving the past in trust for future society. 'Mission or creative vision' was identified by respondents in this group as one of their top three drivers towards environmental sustainability in the near future.

Many Museums & Heritage organisations also operate their own buildings, so may be more able to take action and experience operational paybacks from day-to-day actions: almost all of the respondents in this group (**94%**) say they have experienced benefits from their environmental actions. They were also the only group to identify capital development as one of their top three priority areas for investment of resources into environmental sustainability over the next three years.

Operationally, **65%** of respondents have a dedicated green team or green champion – the highest of any group – and levels of day-to-day action such as measuring environmental impacts are relatively high.

Museums & Heritage organisations are also reporting the highest levels of partnership, with four in five saying they have collaborated with external organisations on environmental sustainability.

ACTION

88%

have an up-to-date environmental policy

81%

measure their environmental impacts

83%

have collaborated on environmental sustainability

31%

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

65%

have a green team or green champion

28%

generate their own renewable energy

ATTITUDES

94%

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

44%

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

83%

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

BENEFITS

94%

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
- Mission or creative vision
- Compliance with regulations or funders

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
- Measuring and monitoring of impacts
- Capital development

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

- Accessing external funding
- Capacity
- Skills or knowledge

Museums & Heritage organisations identified the following as their top three support requirements:

- Embedding environmental actions into day-to-day operations
- Effectively communicating environment-related work
- Accessing external funding

Literature / Spoken Word organisations were the only other group to identify 'effectively communicating environment-related work' as one of their top three support requirements.

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.

6% of respondents identified themselves as working in Museums & Heritage.

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.

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.

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.

PHOTO National Theatre, by Julie's Bicycle

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

This is widely reflected in reported day-to-day actions: nine in 10 have an up-to-date environmental policy, over half have a green team or green champion, one in three are on a green energy tariff or buying energy from a 100% renewable energy supplier, and nine in 10 measure their environmental impacts.

Almost half (**45%**) have an environmental policy or action plan that refers to specific emissions reductions or other targets that are based on international, national or local policy targets: by far the highest of any group, and indicating a sector with a keenly developed understanding of the political and environmental context in which it is operating.

ACTION

89%

have an up-to-date environmental policy

93%

measure their environmental impacts

79%

have collaborated on environmental sustainability

34%

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

54%

have a green team or green champion

18%

generate their own renewable energy

ATTITUDES

93%

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

51%

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

64%

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

BENEFITS

87%

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
- Measuring and monitoring of impacts
- Waste management

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

- Capacity
- Accessing external funding
- Level of interest among audiences/visitors/consumers

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

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

- Skills or knowledge
- Accessing external funding
- Availability of/access to appropriate green services/suppliers

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.

23% of respondents identified themselves as working in Theatre.

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.

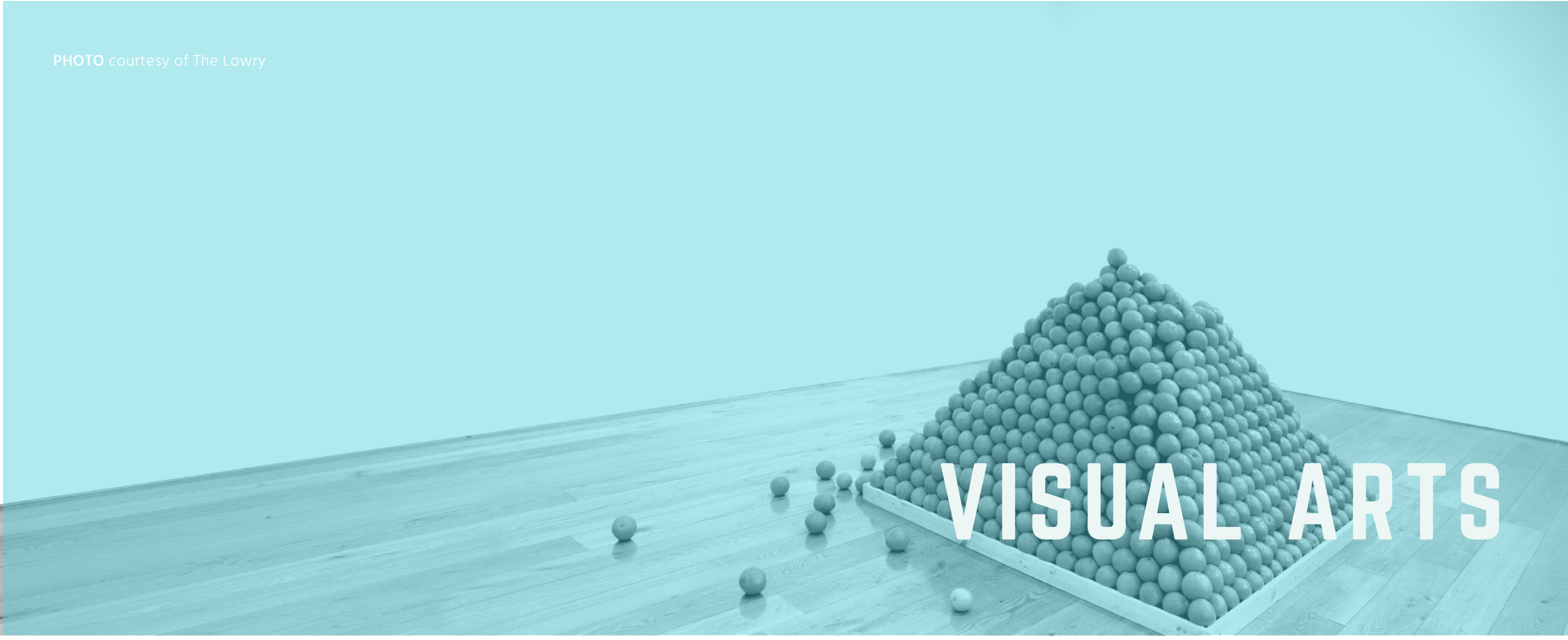


PHOTO courtesy of The Lowry

VISUAL ARTS

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

The responses indicate that it is an issue that has very quickly climbed the agenda: two-thirds or **69%** of respondents think that environmental sustainability has become more important to their organisation over the last few years (this is significantly higher than the average across the other sectors, where it is half of respondents).

This attitude is reflected in reported day-to-day actions: almost all have an up-to-date environmental policy (**97%**) and are measuring their environmental impacts (**94%**), just under half have a dedicated green team or green champion (**41%**), and one in three are on a green energy tariff or buying energy from a 100% renewable energy supplier.

Respondents in this group are holistically looking forward, with key priorities for investment spanning all of their activities across day-to-day operations and efficiencies, programming/creating work, and organisational strategy.

ACTION

97%

have an up-to-date environmental policy

94%

measure their environmental impacts

75%

have collaborated on environmental sustainability

36%

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

41%

have a green team or green champion

6%

generate their own renewable energy

ATTITUDES

91%

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

69%

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

69%

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

BENEFITS

84%

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
- Compliance with regulations or funders
- Reduced costs

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
- Programming/creating work
- Organisational strategy

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

- Capacity
- Embedding environmental actions into day-to-day operations
- Accessing external funding

Visual Arts organisations identified the following as their top three support requirements:

- Accessing external funding
- Skills or knowledge
- Availability of/access to appropriate green services/suppliers

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.

11% of respondents identified themselves as working in Visual Arts.

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.

4

INNOVATION & GREENING THE SUPPLY CHAIN

There is an emerging vision of the creative space as a laboratory for a low carbon future. This is particularly relevant in the context of the UK's new low carbon economic strategy. The creative industries, contributing almost £90 billion net to the UK's GDP, should be recognised for the key role they can play in making this a reality.

RECOMMENDATIONS

- The sector should proudly communicate its achievements in the area of innovative low carbon solutions and the way the entrepreneurial spirit, creativity and investment of the sector combined can be harnessed to find new technologies
- There is an opportunity for more and better frameworks to enable collaboration between investors, Universities, R&D, funders, start-ups, and the creative sector in shaping the technologies of tomorrow
- For day-to-day operations, there is a need for external support and/or better professional development and training to undertake due diligence on the 'green' technologies and solutions on the market

KEY FACTS

37% of respondents identified 'developing collective procurement options for greener products and services' as a key collective action that would accelerate engagement with climate change across the cultural and creative sector.

Simultaneously, 'access to and availability of green services' was reported as a key challenge by many organisations.

Green supply chains are not as well developed as they could be, both for sector-specific services and for suppliers also serving other sectors or industries in which sustainability is not high on the agenda.

In some instances, the quality of green products was also found to be lacking.

> *Improved access to environmentally sustainable suppliers, especially in the north, and more competitive pricing compared with traditional technologies would help tip the balance of the sector to one focusing more on sustainability.*

Organisations also identified a lack of knowledge and/or available and accessible expertise as a challenge, compounded by sometimes misleading or difficult to understand information from suppliers and other external stakeholders.

CREATIVITY & SOLUTIONS

Some organisations nevertheless used their creative resources to develop new or custom technologies and solutions for their needs.

> *Developed an outside broadcast vehicle whose specialist audio/ broadcast equipment has been 100% powered by solar and kinetic energy stored in a battery bank (...it has never been plugged into mains electricity).*

Additionally, some organisations reported that insisting on environmental sustainability credentials actually improved the services they received from their suppliers.

> *Improved service and dedication from supplier.*

INVESTMENT OPPORTUNITIES

Organisations in the creative and cultural sector are making significant capital investments into environmental sustainability where they are able to, and where appropriate services, partners and suppliers are available.

> *Investing over £12m in more efficient plant and machinery with lower energy use and reduction of carbon.*

> *Built our office building from recycled shipping containers with PV panels, sensor lighting, etc.*

There is also a vision for collective procurement and investment in the sector. These two things together, alongside the growing importance of collaboration in creative action on climate change and environmental sustainability, signify that there is fertile ground for better co-investment between industry, R&D and the sector.

> *Collective investment in low-carbon technology, especially energy.*

BENEFITS

Collective procurement and investment should be an opportunity for the arts and creative industries to be beacons of good practice/early adopters, while simultaneously allowing businesses, start-ups and service providers to develop new markets and products both within and beyond the sector.

> *The first solar-powered recording studio in Europe.*

> *We're a national organisation and should be a showcase for real and genuine change.*

> *More circular economy activity. To lead the way for other sectors of the economy. To become torch-bearers.*

5

A ROLE FOR JULIE'S BICYCLE

The Creative Climate Census is a pioneering piece of research on the attitudes and behaviours of cultural leaders on climate change and environmental sustainability and how these impact business decision-making and planning. The results of the first edition were published in May 2014. The survey was repeated in early 2017 to see what trends have emerged since then. The responses in 2017 highlight the vital role and impact of Julie's Bicycle at defining and re-defining the environmental sustainability agenda with the sector.

RESPONDENTS HIGHLIGHTED THE IMPACT JULIE'S BICYCLE IS HAVING THROUGH:

Setting the agenda for the sector, allowing organisations to build, articulate or reinforce environmental sustainability as a strategic priority and ensuring it is recognised as such.

Building a collaborative and mutually supportive attitude throughout the arts and creative community, inspiring organisations to take action.

Informative and inspiring events, which were highly regarded by many respondents.

Creating space for networking, information sharing and knowledge exchange on environmental sustainability in the sector through events, and acting as a direct connector.

Resources and support through practical advice, assistance and services such as the Creative IG Tools, Creative Green Certification and webinars.

Specialist sector-specific knowledge – respondents praised the bespoke nature of the support, Julie's Bicycle's familiarity and experience of the sector, and the knowledge and expertise of staff, which mean that organisations can be directed towards the most appropriate resource or way forward.

Monitoring and audit tools and services – organisations remarked that the opportunity to self-monitor and audit organisational activities allowed for a clearer and more accurate understanding of organisational activities in relation to environmental sustainability.

Maintaining links to other industries and countries to facilitate greater sharing of expertise and signposting beyond the UK arts and creative industries.

Advocating and lobbying on behalf of the role of the arts and creative industries in how we address climate change as a society.

Environmental sustainability has been nagging on our shoulders for a while now. We've previously buried our head a bit. Julie's Bicycle helped to establish a baseline/benchmark of our carbon footprint – a tool to measure and hopefully reduce it. It's been enormously helpful and crucial hand-holding. Julie's Bicycle have been critical for us.

We're very taken with Julie's Bicycle; they can zero in on the core of the issues.

MOST VALUABLE RESOURCES OR SUPPORT OFFERED BY JULIE'S BICYCLE:

Learning how we can make a difference collectively and alone.

Feeling of partnership, strength through collaboration and mutual support under extraordinarily difficult circumstances.

Most valuable has been the steady and supportive encouragement from JB together with the gradually developing sophistication of the ACE relationship.

The events that JB runs have proven invaluable in re-energising staff on the issue.

Event at NT some time ago emphasised for me the value of JB being an advocate and lobbyist on behalf of The Arts.

Knowing that we have access to a JB officer who absolutely understands our sector and the pressures on venues to tackle so many challenges every day, and seeks appropriate info to help the venues without trying to suggest that environmental issues are the most important thing they should be tackling.

Networking or sharing of practice/contacts/suppliers, especially when there is also a financial benefit.

Specialist knowledge, support, and global links.

Benchmarking tools and detailed reporting which we can cycle back into our funding applications.

Reporting to Julie's Bicycle is helpful for measuring our impact and seeing where we need to improve. Their resources/webinars/case studies help to find ways that might work for us.

All the training has been high quality and practical.

Very good events with knowledgeable staff and guest speakers, and excellent website with resources.

Website is invaluable for resources and help with action plan.

Practical tips; specific advice tailored to our own circumstances; Cumulative data from using IG over a number of years providing an incentive to keep improving.

Availability of JB members of staff for help and advice.

Julie's Bicycle will work on the strategic priorities, primary areas for support, and opportunities for further development identified by the sector throughout the rest of the survey to plan our programmes for the coming years.

We'd like to thank all of our supporters over the past three years for enabling our continued work, expertise and services in buoying and strengthening the arts and creative industries as they take action on environmental sustainability and climate change. We'd also like to thank all of the individuals and businesses who have worked with us, have put their trust in our expertise, and who have taken the time to respond to the survey.

ACKNOWLEDGEMENTS

Special thanks to all respondents to the survey for sharing their insights, thoughts, and good practice: both in 2014 and 2017.

Content: Alison Tickell (Julie's Bicycle), Chiara Badiali (Julie's Bicycle)

Research: Julie's Bicycle and Martin McKee (Social Value Lab) and Rick Rijsdijk (Social Value Lab)

Design: Michelle Murvai

Proofreading: Sarah-Clare Conlon

This report is a synthesis of findings written by Julie's Bicycle. It is based on the full report written by Social Value Lab for Julie's Bicycle. The full Social Value Lab report can be found **here**.

Supported by:

Supported using public funding by ARTS COUNCIL ENGLAND

Innovate UK Knowledge Transfer Network