

Creative Climate Census:

Sustaining Creativity Survey 2017

A Report for Julie's Bicycle

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This report has been prepared by Social Value Lab on behalf of Julie's Bicycle.

The report presents the findings from the Sustaining Creativity Survey 2017.

The research team would like to acknowledge the contribution of all those organisations that responded to the Sustaining Creativity Survey 2017 as well as those individuals who made themselves available for interview.

Thank you for your participation and invaluable insights!

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Executive Summary

Headlines from the Sustaining Creativity Survey 2017 conducted with leaders of cultural organisations.

Sustaining Creativity 2017

In 2014 Julie's Bicycle published its first Sustaining Creativity Survey report highlighting the actions and attitudes from the creative community towards environmental sustainability. It was the most comprehensive survey across the creative sector to place environmental sustainability at its core.

Findings in 2014 proved to be encouraging. The survey reported high engagement across the sector and an emerging desire to lead change. The strongest driver for engagement was the personal commitment of staff but despite the potential benefits of action, support from those in leadership and governance positions at the top of organisations was lacking. Leadership was coming from the middle and not the top of organisations and environmental sustainability was not yet seen as a core business concern. Emerging levels of action were evident and there was a desire to network and engage in shared action to pursue the environmental agenda. While environmental sustainability was considered a priority, actions did not match attitudes. The 2014 findings concluded that compliance with funding conditions was a fertile catalyst for establishing environmental sustainability as the norm.

In 2017, and now in their tenth anniversary year, Julie's Bicycle commissioned Social Value Lab to undertake a follow-up survey to update the findings and take stock of progress made since 2014. In order to help Julie's Bicycle better map the current creative and cultural dimensions of climate change and how the creative community thinks about the climate challenge, the Sustaining Creativity survey was aimed at directors and senior managers of creative and cultural organisations. Its purpose was to determine and understand what if anything has changed since 2014 and attempt to capture the current range and breadth of creative practice.

Conducted between December 2016 and April 2017, the study comprised an online survey and supplementary interviews with key participants. The survey was circulated to existing Julie's Bicycle contacts and disseminated more widely across a variety of social media platforms and via wider partnership organisations, networks and sector newsletters.

The survey allowed creative organisations to provide information on the environmental sustainability of their organisation as well as the creative sector as a whole, focussing on attitudes, actions, progress, implementation and achievements. A total of 476 responses were received which provided a working sample of 442; an increase on the number of organisations that engaged in 2014. One-quarter of 2017 organisations were identified as repeat completers; engaging with the Sustaining Creativity Survey in both the 2014 and 2017 waves. A total of 676 unique organisations have participated since its 2014 inauguration.

The range of responding organisations mirrored the diversity of the sector itself. Overall, the responding organisations reach a combined audience of at least 138 million, and have a collective turnover of approximately £1.1 billion. They represent organisations in the sub-sectors of Combined Arts, Dance, Design, Fashion, Literature/spoken word, Media/Broadcast/Film/TV, Museums and Heritage, Music, Theatre and Visual Arts. Geographically, responses from creative organisations predominantly represented those in England but also included organisations in Scotland and Wales. No responses were registered from Northern Ireland creative organisations.

All regions in England were represented, with a strong bias towards London and a lesser, but notable, bias towards the North West. Similarly, there was a wide range of organisation type and size; from small local to large national, and from fully funded to commercial/non-funded. A small number of supplementary interviews with key cultural sector stakeholders were also conducted and were sampled by cultural sub-sectors

Findings from the Sustaining Creativity 2017 Survey were relatively consistent with 2014 findings but the last three years have seen environmental sustainability climb the agenda in terms of importance and this trend looks set to continue. There has been a slight increase in its reported importance and a similar slight increase in reported actions with most of the sector having implemented or improved their environmental policies and action plans in this time. The sector continues to seriously consider its environmental sustainability.

The results show a genuine appetite for environmental sustainability across the creative sector and, while the survey findings are positive and build encouragingly on 2014's findings, there is more work to be done. IN 2017 compliance with funding requirements ensures environmental sustainability remains high on the agenda and there is evidence that due to the environmental funding conditions and greater expectations of the four devolved UK Arts Councils, more generally local authorities; expected norms and behaviours are beginning to change. This is further supplemented by the personal values of engaged staff.

SUSTAINING CREATIVITY 2017 KEY MESSAGES: THE CULTURAL SECTOR

The Cultural Sector

Support growing	Environmental sustainability is now strongly supported by those in senior positions; leadership and governance positions, than in 2014
Engagement increasing	Engagement with environmental sustainability remains high. The strongest drivers are the commitment of staff or senior management; reduced costs; and compliance with regulations or funders. Remarks by sector leaders show a genuine interest in, and engagement with, environmental considerations, as do the scale and detail of provided responses
Recognition rising	Due to the potential and realised range of benefits in union with compliance issues, environmental sustainability is now recognised as a core element of organisational thinking and business planning when making strategic and creative decisions. It is no longer seen as an 'add on'

Much of the sector has been active, and actions in 2017 more closely align with aspirations, compared to 2014.

While environmental sustainability featured highly, there was occasionally a perceived conflict between environmental sustainability and the creative vision of programmes and performances that needed to be addressed or reimaged. In some cases, green efforts did not return the expected organisational benefits but overall, drivers were positively reported and environmental considerations vigorously pursued.

Comparatively, organisations reported doing at least as much as their creative peers; other artforms and others within their own artform, so when it comes to environmental sustainability, organisations do not feel that they are lagging behind.

The sector has also progressed a range of actions, including: changes in day to day operations; capital investments; strengthening organisational strategies and action plans; engaging staff; creative works, programmes with environmental sustainability as a main theme; and local, regional, and national partnerships.

Areas that the sector found challenging and where action had, at times, been less effective included: behavioural change in staff; behavioural change in audiences/consumers; limited ability to adapt their location or operating environments; organisational capacity; difficulty engaging and communicating with other organisations; fashionable, ad hoc and short term initiatives that were ill-devised or ill-prepared; access to and availability of quality green supply chains; perceived financial viability of green actions; and a lack of specialist environmental knowledge. Exploring the activities that the sector found challenging is an important learning opportunity for all organisations across the creative sector.

Creative organisations reported on the range and the extent of benefits they experienced as a result of their environmental sustainability progress.

SUSTAINING CREATIVITY 2017 KEY MESSAGES: ACTIONS AND BENEFITS

Actions and Benefits

Driving change

Unlike 2014, environmental sustainability leadership is now coming from the top tiers of cultural organisations; from directors and senior managers. Environmental sustainability is chiefly driven by engaged senior staff with strong concerns about climate change and clean energy

Future drivers

There is a range of important personal and organisational drivers within the sector. The primary future drivers of environmental sustainability are: the commitment of staff or senior management; reduced costs; and compliance with regulations or funders

Embedded practices

In 2017, compared to 2014, responding organisations are more likely to be engaged in and planning for, environmental sustainability practices, more of the time. These figures more than any others, show the level of change and the progress made in the last 3 years. A wide array of emerging and embedded actions is clearly evident. These range from small day to day operational activities, to large-scale holistic strategies and national partnerships. Compliance with funding requirements ensures environmental sustainability remains high on the agenda, further reinforced by the personal principles of engaged staff.

Increased benefits

Creative organisations experienced a range of benefits due to their environmental actions. Overall four out of five organisations reported benefits as a result of their environmental sustainability practices. Over half benefited financially but other benefits were also reported including reputational, staff wellbeing and creative prospects

Collaboration

Organisations highlighted that a culture of collaboration extended to environmental sustainability initiatives alongside artistic partnerships. Prominent levels of collaboration were reported in the last three years and three-quarters of organisations reported collaborative practices with a range of: other arts organisations; artists; environmental consultants; local authority or policymakers; green charities or campaigning organisations; local community groups; research institutions or higher education; and schools

The role of Julie's Bicycle

The sector reported significant collaboration with Julie's Bicycle and have utilised its resources and attended its events. The assistance provided by Julie's Bicycle was positively regarded and the sector articulated value in their suite of support: strategic priorities and agenda setting for the sector; the events regularly hosted or facilitated by Julie's Bicycle; the associated networking and knowledge sharing; the wide-ranging resources and available support in the form of practical advice and assistance; the specialist sector specific knowledge; and the opportunity to accurately self-monitor and audit organisational activities as a result

The Sustaining Creativity 2017 Survey concludes that collective actions will continue to have a positive impact on the cultural sector and accelerate engagement with climate change. The sector itself desires higher levels of shared action and co-operation on environmental sustainability.

As a relative measure, improving environmental sustainability was not ranked as highly as most other organisational priorities. Financial considerations in union with interested and engaged audiences remain the primary concerns of the creative sector. However, almost half (45%) of responding organisations reported that improving environmental sustainability was a 'high' priority, and a further 50% reported it as 'some priority'. This means that 95% of organisations stated that environmental sustainability was a priority for them.

SUSTAINING CREATIVITY 2017 KEY MESSAGES: FUTURE CONSIDERATIONS

Future Considerations

Key obstacles to environmental sustainability included:

- Challenges remain**
- ☐ Capacity issues sometimes hamper progress – actions can struggle to meet desire;
 - ☐ Maintaining long-term commitment and embedding environmental actions into day to day operations;
 - ☐ lack of control over the working space / building;
 - ☐ lack of appropriate green supply chains (scale or quality);
 - ☐ and the availability of specialist knowledge needed in the area

Support is vital

Support was considered important, sometimes essential, to enable organisations to realise their environmental goals. Areas in which specialist support was considered most beneficial: to help identify partners for strategic and creative activities; specialist skills or knowledge in relation to environmental sustainability; help to identify sources of creative and green funding; and the availability of and access to quality green services and suppliers. The creative sector deems ongoing and future support as vital

Future resources

The cultural sector is keen to dedicate additional time and money to environmental sustainability over the next few years, primarily in: day-to-day operations and efficiencies; waste management; and measuring and monitoring of impacts

Competing priorities

The cultural sector is horizon scanning optimistically. In order to improve and strengthen, the sector will chiefly focus on the following priorities: developing audiences / visitors / consumers; developing new sources of income; and developing creative work or programmes. As expected, the creative sector's core priorities still rank above environmental sustainability in relative importance.

Future action

The sector will be engaging in a variety of future environmental actions over the next few years. Likely future activities echoed, and built on, those already taken in the last few years. This included: small and large scale practical changes in day to day operations; capital investments; adapting and implementing organisational strategies and action plans; educating and engaging staff; performative sustainability and green thematic works; advocacy; and local, regional, and national partnerships

Collective action

There is an increased desire for networking, knowledge transfer and learning across the sector. The sector principally supports the idea of the development of a shared vision or action plan for the sector; developing a community of peers that provide opportunities to share practice and network; continuing to work with funders to introduce new investment and incentives; and developing collective procurement options for greener products and services

Next steps

Despite some challenges, there is considerable optimism within the creative sector. Looking forward, it is expected that increased benefits would be experienced by continuing to support and incentivise environmental sustainability

The Sector in numbers

92%	consider environmental sustainability to be relevant to their organisational vision and mission
83%	report organisational benefits from their environmental actions
77%	of responses from senior leadership; those reporting as Director or Senior Management level
84%	have an up-to-date environmental policy
36%	of organisational environmental policies or action plans refer to specific emissions reductions or other targets that are based on international, national, or local policies.
48%	have a Green Team or Green Champion
38%	are on a green energy tariff or are buying energy from a 100% renewable energy supplier
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

The importance of environmental sustainability to creative organisations was a strong feature of the Sustaining Creativity Survey 2017.

Overall, and across all sub-sectors, a higher percentage of organisations revealed they have an up-to-date environmental policy in 2017, than compared to 2014 (84% to 67% respectively).

In 2017, as in 2014, subsidised organisations are still leading the way in terms of developing and maintaining environmental practices, reinforcing the idea that environmental conditions of funding are a strong driver of change. While funding conditions are certainly a driver of organisational engagement with environmental sustainability, so too is the personal commitment of staff or senior management. Personal commitment is a strong indicator of engagement with environmental sustainability. It would be fair to conclude that the two conditions in tandem; funding conditions and staff commitment, provide the most fertile ground for engagement with environmental sustainability practices. This also means that the most profound environmental activity is inherently vulnerable. If key individuals are the ones pushing the boundaries of often funding conditional environmental activity, and then leave the organisation before activities are fully integrated into overall strategies, priorities, policies, and job descriptions, there is a higher chance that activity will contract.

Compliance with funding requirements and a genuine interest from staff in the sector ensures environmental sustainability remains high on the agenda. The creative sector is pursuing future plans to create or extend collaborations, partnerships or networks and The Sustaining Creativity 2017 Survey suggests that future collective actions by the sector will strengthen and extend associated benefits and accelerate engagement with climate change. Despite some challenges, there remains considerable optimism within the creative sector and with a little extra support, co-operation and coherence, environmental sustainability within the creative sector will continue to enjoy fertile ground.

In 2017, the clear message coming from the creative sector about future action and direction is - **more of the same.**

1. Introduction

This report has been prepared by Social Value Lab on behalf of Julie's Bicycle. The report presents the findings from the Sustaining Creativity Survey 2017.

Introduction


Julie's Bicycle is a London based charity that supports the creative community to act on climate change and encourages environmental sustainability across the cultural sector.

Julie's Bicycle supports the creative community with the skills to act and use their influence to achieve the Paris Agreement goal of a stable climate in which temperature rise is limited to under 2 degrees Celsius and latterly drive efforts to achieve and maintain a 1.5 degree Celsius rise. By focusing on energy, the major source of carbon emissions for the cultural sector and by running a diverse programme of events, free resources and bespoke consultancy for the creative community, Julie's Bicycle contributes to national and international climate change policy development. Its suite of carbon calculators and certification scheme – the benchmark for sustainability achievement within the creative industries – is used by more than 2,000 companies. Their IG Tool was designed specifically for the creative industries and is free to use, meaning organisations and individuals can monitor their environmental impact and allowing Julie's Bicycle to collect and analyse robust environmental data from the sector.

Context

In December 2015 under the **Paris Agreement**, nearly 200 countries committed to taking specific action to tackle climate change. The Paris Agreement came into force in November 2016.

THE PARIS PLEDGE FOR ACTION



As cities, regions, businesses, investors, civil society groups, trade unions and other signatories, coming from every sector of society and every corner of the world, we realize that dangerous climate change threatens our ability and the ability of future generations to live and thrive in a peaceful and prosperous world. We also realize that taking strong action to reduce emissions can not only reduce the risks of climate change but also deliver better growth and sustainable development. As a result, we the undersigned, affirm our strong commitment to a safe and stable climate in which temperature rise is limited to under 2 degrees Celsius. In support of this, we welcome the adoption of a new, universal climate agreement at COP21 in Paris, which is a critical step on the path to solving climate change. We pledge our support to ensuring that the level of ambition set by the agreement is met or exceeded. We will do this by taking concrete steps now, and without waiting for the entry into force of the agreement in 2020, both individually and cooperatively, to reduce greenhouse gas emissions to a safe level and build resilience against those changes already occurring. We will look back at this moment as our turning point, when the transition to a low-emission and climate resilient economy became inevitable, irreversible and irresistible. We must, we can and, together, we will solve climate change.

The respective **UK Arts Councils**; Arts Council England (ACE), Creative Scotland (previously Scottish Arts Council), Arts Council of Wales, Arts Council of Northern Ireland are the public bodies that fund, support and develop much of the cultural sector. They primarily distribute funding from two sources, Government and National Lottery. The investment from both has helped to transform arts organisations and has increased high quality arts activity. Through these funding streams, a portfolio of organisations and their varied activities are supported. Each of the councils has their own Environmental Strategy and portfolio organisations must adhere to these standards as a condition of funding. One example is Goal 3 of Arts Council England's ten-year environmental strategy:

Goal 3 - Resilience and Sustainability: The arts, museums and libraries are resilient and environmentally sustainable.



...We are also committed to embracing environmental sustainability and reducing our carbon footprint, both within the Arts Council and the organisations we fund.

What will success look like?

- ▣ the cultural sector embraces environmental sustainability and has reduced its carbon footprint
-

Arts Council England also commit to improving their own environmental performance. All staff, suppliers and funded organisations are expected to follow the principles of the policy so that organisations know more about what they need to do to satisfy their Arts Council England environmental reporting requirements. Part of ACE Funding Agreement Conditions requires engagement with, and reporting to, **Julie's Bicycle**. In the last two years, Julie's Bicycle ensured that reporting requirements are tailored for the individual nature of an organisation's size, scope and activities. These requirements are:

Submission of data	Organisations must enter 12 months of monitoring data for buildings or activities (festivals; tours; productions) to Julie's Bicycles' Creative IG Tools.
An environmental policy and action plan	Organisations should have an environmental policy and action plan in place; to be uploaded to the Creative IG Tools website.

Guidelines, which recommend that policy and action plan development is overseen by senior management organisations develop environmental policies and action plans were supplemented with examples and case studies. Organisations are also assisted evaluation mechanisms to gauge progress. Both of the above requirements can be met via Julie's Bicycles Creative IG Tools account. In addition to the strategic contexts already discussed, there are various **Local Authority** and **City Council** environmental policies, strategies and action plans. While these geographic areas and associated standards are too numerous and diverse to explore in detail, their introduction here should not be considered to represent a lack of importance to creative organisations across the UK, or to environmental sustainability itself.

Sustaining Creativity Programme

'Sustaining Creativity', an ongoing research programme delivered by Julie's Bicycle, examines the drivers, benefits, challenges and impacts of environmental sustainability within the creative community. Taking a holistic approach, its aims are to:

-
- **Inspire** cultural leadership on sustainability;
 - **Extend** ambition about what is possible using real examples;
 - **Highlight** some key shifts needed to develop a sustainable creative infrastructure;
 - **Foster** confident decision-making that looks beyond political and funding cycles; and
-

In 2014 Julie's Bicycle published its first Sustaining Creativity Survey report highlighting the actions and attitudes from the creative community towards environmental sustainability. It provided useful indicators of on-going cultural shifts: where there was movement and where ideas had become stuck. In 2017 (and in their tenth anniversary year) Julie's Bicycle commissioned Social Value Lab to undertake a follow-up survey to update the findings and take stock of progress made since 2014. The Sustaining Creativity survey, aimed at directors and senior managers of creative and cultural organisations, aimed to determine and understand what, if anything, has changed since 2014; and attempt to capture the current range and breadth of creative practice.

Julie's Bicycle works with organisations and cultural practitioners across the UK and internationally to embed environmental sustainability into their creative practices and operational work. Participants across the cultural sector were invited to share their insights which will contribute to the next phase of this work both to supporting the sector, and to advocate to others about the crucial role the creative community plays in the climate challenge.

Method

Acting as research partner, the study was carried out by Social Value Lab between December 2016 and April 2017. The study involved a number of main stages:

1. Cultural Sector Survey

The original 2013 survey instruments were reviewed and updated to ensure the validity, comprehensiveness, and efficiency of the question sets. Respondents were invited to feedback on their organisational environmental actions and on how they perceived progress on environmental sustainability. The online survey was administered to Julie's Bicycle's full database of contacts as well as circulated widely across Julie's Bicycle's own social media platforms and via their wider partnerships and networks.

The survey received **476 responses**; an increase on 2014. Once duplicate organisational entries were removed, a **working sample of 442** remained, 105 more than in 2014.

TABLE 1.1: SURVEY RESPONSES AND SAMPLES IN 2014 AND 2017

	Responses	Working Sample
2014	370	337
2017	476	442

Across both 2014 and 2017, it was identified that **103 organisations** completed the Sustaining Creativity Survey. This means that **one-quarter (24%) of 2017 responding organisations are repeat completers**. Furthermore, from the 2014 and 2017 working samples it means **676 unique organisations participated during its first two waves**.

2. Key Sector Leaders Interviews

The survey was enriched with a series of discussions with key cultural leaders, semi-structured conversations conducted by telephone to share their organisational practice and reflect on the sector as a whole; in particular, progress, implementation and achievements to date. Interviewees were selected on the basis of identified cultural sub-sectors (visual arts, music, theatre etc.), good practice, and agreed with Julie's Bicycle. **6 people** were consulted.

3. Analysis and Reporting

We analysed the quantitative and qualitative data obtained from the survey and interviews to extract the key messages which will contribute to the next phase of Julie's Bicycle's work. The findings, learning and recommendations arising from the research are set out in the following pages.

The Future of the Sector /

The appendix contains all the personal vision quotes for an environmentally sustainable creative sector. Might be nice in your redesign to select some good quotes and use them in between each chapter/section.

2: The Creative Sector

This Section details the scope and scale of the creative sector's environmental sustainability as well as headline figures from the Sustaining Creativity Survey 2017.

The Creative Sector

Recognition of the creative sector as a key engine in the economy and its importance in shaping the social and cultural life of the UK has been growing, leading to increased levels of political and economic support¹. However, in the context of the Paris Agreement and UK Climate Change Act, to what extent are connections being made to climate change and environmental priorities? and does the sector itself recognise these links? The creative sector is well-placed to fundamentally integrate the environmental dimension so does it recognise environmental sustainability as an industry priority and the key position it has within the wider UK business and cultural sphere?

To begin to unpack these questions, it is necessary to understand the environmental contribution of the sector; what are the main drivers, priorities and challenges of cultural organisations? And how do they view the future? These are all obvious questions, but questions that have gone unasked until relatively recently. The search for clearer evidence led to the holistic approach of Julie's Bicycle's ambitious Sustaining Creativity programme and respective surveys of the creative sector in 2014 and again in 2017. The project and this report aim to create the fullest understanding yet of creative responses in the UK.

Scale and Maturity

Creative organisations operate as a distinct sector within the UK and come in many shapes and sizes, from large national and international organisations to smaller community operations. Collectively, they represent a substantial portion of commercial, social and cultural life in the UK. UK Government figures published in January 2016 revealed that the UK's Creative Industries were worth £84.1 billion per year to the UK economy. That figure equates to almost £10 million an hour to the UK economy².

The then Minister for Culture, Communications and Creative Industries, Ed Vaizey said:



The creative industries are one of the UK's greatest success stories, with British musicians, artists, fashion brands and films immediately recognisable in nations across the globe. Growing at almost twice the rate of the wider economy and worth a staggering £84 billion a year, our Creative Industries are well and truly thriving and we are determined to ensure its continued growth and success

In addition, the sector itself reports from time to time on the state, health and value of the creative sector. In July 2015, an Arts Council England commissioned report was published highlighting the substantial contribution of the arts and culture industry to the national economy³. More recently, the Arts and

¹ Creative Industries Federation. [The Federation welcomes the creative industries as a key government sector](#). January 23, 2017.

² Creative industries worth almost £10 million an hour to economy [[Press Release](#)]

² Creative industries worth almost £10 million an hour to economy [[Press Release](#)]

³ Contribution of the arts and culture industry to the national economy: An update of our analysis of the macroeconomic contribution of the arts and culture industry to the national economy. [Report for Arts Council England](#) [July 2015]

Humanities Research Council (AHRC) supported The Cultural Value project that explored the importance and the effects of culture and the arts⁴.

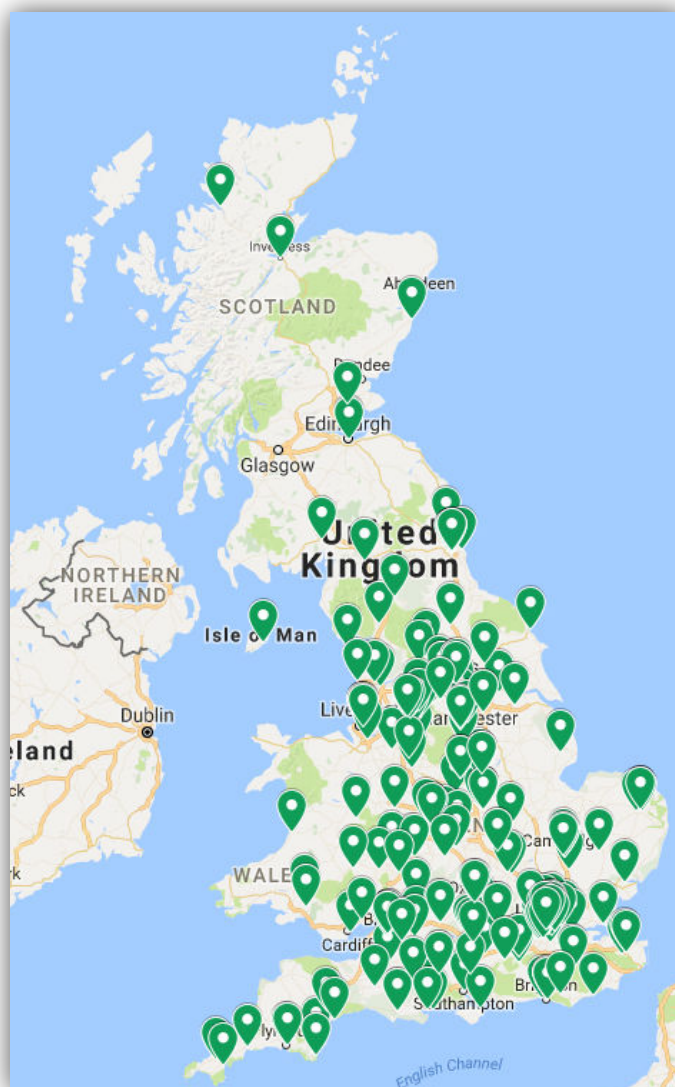
Geography

Geographically, the creative sector shows a rich and diverse pattern of coverage across the UK. While survey responding creative organisations are located across the UK, they are often concentrated and more numerous in the larger, populous urban areas.

Regional locations of responding cultural organisations were derived from postcode data and coded using the nine official regions of England, as well as Scotland and Wales. As expected, and due to Julie's Bicycle's existing relationships and networks, responses from creative organisations predominantly represented those in England but also included organisations in Scotland and Wales. No responses were registered from Northern Ireland creative organisations. All regions in England were represented, with a strong bias towards London and a lesser, but notable, bias towards the North West.

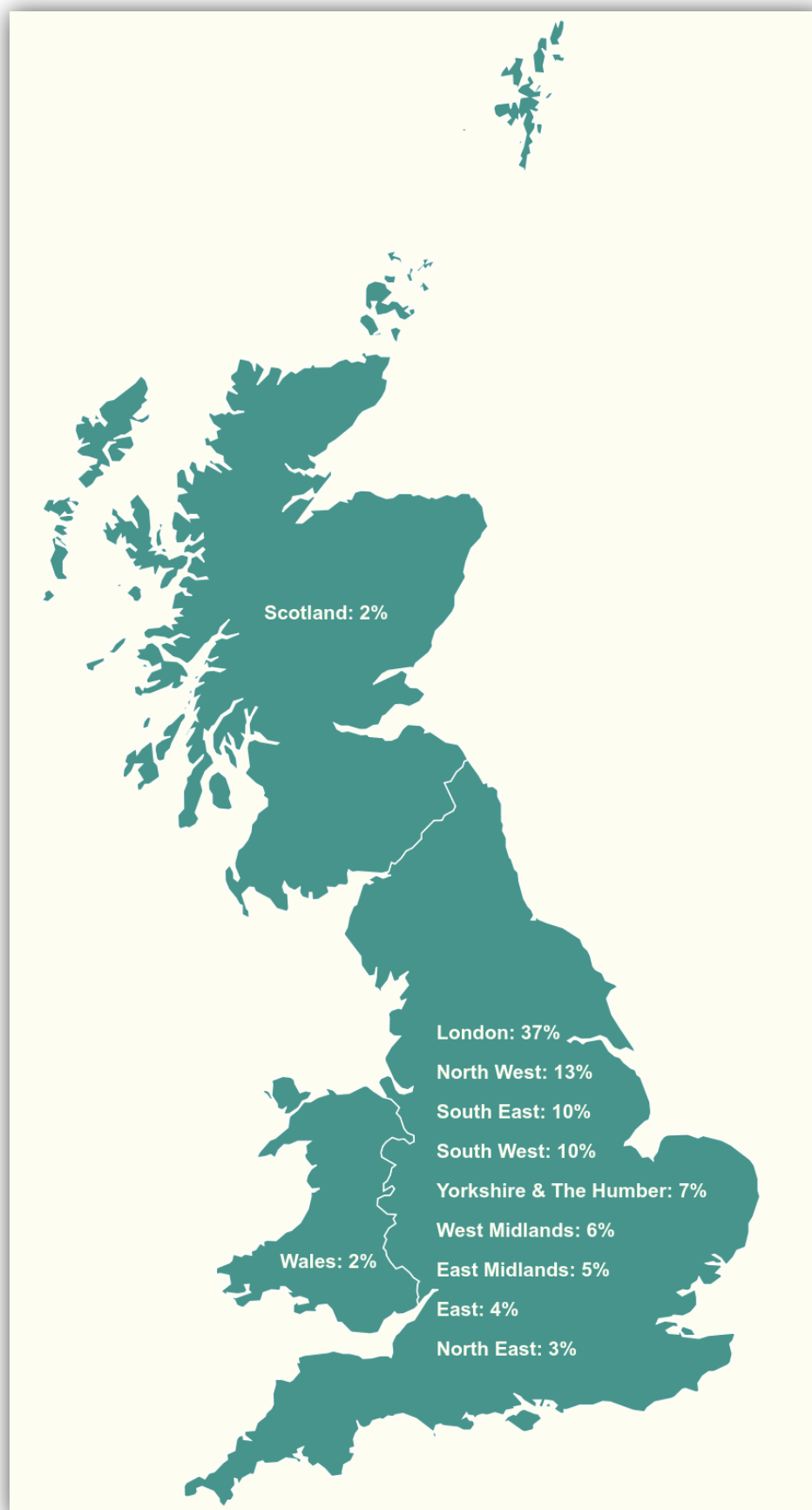
SUSTAINING CREATIVITY 2017 RESPONSES BY REGION

London	37% (38%)
North West	13% (12%)
South East	10% (4%)
South West	10% (4%)
Yorkshire & The Humber	7% (5%)
West Midlands	6% (9%)
East Midlands	5% (2%)
East	4% (4%)
North East	3% (4%)
Scotland	2% (11%)
Wales	2% (4%)
N/A	1% (2%)
% 2017 (2014)	



⁴ [Understanding the Value of Arts & Culture](#) (2016). The AHRC Cultural Value Project. Arts and Humanities Research Council [March 2016]

SUSTAINING CREATIVITY 2017 RESPONSES BY REGION



Scope

The reach of creative organisations is substantial and growing. Almost all the creative organisations have a direct audience/consumer relationship with the general public and an increasing number now operate internationally and attract international visitors to the UK. Many also operate overseas with global touring, festivals and other related international projects.

The responding organisations represent a **combined turnover of approximately £1.1 billion**⁵.

In terms of reach, the creative sector as a whole operates with a huge audience/consumer base. This is important because it can be a valuable resource in addressing environmental sustainability and climate change. The collective audience/consumer reach of the survey responding organisations alone was between **204m and 277m**⁶. Even by removing those sub-sectors most likely to skew audience/consumer figures with their high online presence involving streaming or sales services (Music, Fashion and Media/Broadcast/Film/TV), the approximate figure is still in the region of **138m to 146m**.

Cultural Trends

Julie's Bicycle has identified seven primary cultural trends that are shaping the overall cultural response to environmental sustainability (see Table 2.1). Organisations were asked where they would place their organisation, if anywhere, among these trends. Almost three-quarters (73%) of respondents identified as an organisation seeking to improve the environmental impact of their operations and a high number of other organisations self-identified an alignment with the remaining trends.

TABLE 2.1: CULTURAL TRENDS AND THE ORGANISATIONAL SPECTRUM

	%	
Organisational Change	73%	Organisational change, institutions addressing the environmental impacts of their operations
Creative Networks and Collaborations	42%	Creative networks working together to exchange knowledge and take action collectively: both within the creative community and with partners (local authorities; green groups etc)
Artistic Content	38%	Artists, creators, and designers producing, programming, and commissioning work with themes on environment and climate change
Design and Innovation	30%	Design and innovation crossing over with environmental sustainability, such as architects rethinking urban space, designers creating the circular economy, and artists/organisations rethinking their practice
Arts Activism	26%	Artists, activists, organisations, and key figures within the creative community speaking out and/or campaigning
Transition Organisations	14%	Transition organisations, like Julie's Bicycle, bridging the gaps between creative practice and sustainability as creative intermediaries
Policy, Strategy and Funding	13%	Funders, development bodies, or policy-making organisations supporting transformative shifts through their policies, frameworks, and resources

⁵ Turnover categories were averaged and totalled.

⁶ The variance is due to those organisations that explicitly detailed their online reach. Also, where organisations offered their own estimates (e.g. between 40,000 and 60,000, an average was taken - 50,000).

Based on 315 responses

Turnover

Collectively, the responding organisations represent a combined turnover of approximately £1.1 billion. Most of the responding organisations (43%) had a turnover of under £500,000 but nearly a quarter (23%) had a turnover of £1 to £5 million and over one-in-five (22%) had a turnover of upwards of £5 million.

TABLE 2.2: ANNUAL TURNOVER

	%
Less than £500,000	43% (42%)
£500,000 to £1 million	12% (14%)
£1 million to £5 million	23% (*)
£5 million to £10 million	9% (*)
More than £10 million	13% (10%)

Based on 419 responses

*2014 category was £1m - £10m = 31%

As some interviewees explained, strong financial performance allowed many expensive capital projects to be undertaken in an attempt to maximise long-term gain. It was reported that this was primarily investment in hardware and physical assets, most usually buildings and the infrastructure of buildings. Many had invested in major refurbishment programmes over the last few years in order to achieve this goal. This would involve heavy emphasis on the environmental overhaul of physical assets.

Funding

A little over three-quarters (77%) of responding creative organisations received some level of financial support from public funding with the remaining one-quarter (23%) operating with no public funding. Less than one-third (31%) received more than half their income from public sources.

TABLE 2.3: % INCOME FROM PUBLIC SECTOR GRANTS OR FUNDING

	%
None	23% (16%)
Less than 50%	46% (44%)
More than 50%	31% (38%)

Based on 421 responses

Of those receiving funding from public sector grants or trusts and foundations, over half (55%) reported that this funding was conditional and dependent on environmental requirements.

TABLE 2.4: ENVIRONMENTAL SUSTAINABILITY FUNDING CONDITIONS

	%
Yes	55% (n/a)
No	45% (n/a)

Based on 353 responses

Organisations were asked to expand on the environmental sustainability conditions and they highlighted two main conditions:

1. **Arts Council (overwhelmingly ACE) and**
2. **Local authority/city council requirements and operating conditions.**

As Arts Council England National Portfolio Organisations, there was an acknowledgement of the ACE focus on energy monitoring and an alignment with the associated environmental policy and action plan. Many also emphasised the requirement of reporting to Julie's Bicycle. Environmental actions were often mentioned in relation to the statutory or Arts Council funding conditions.

ACE funding conditions - we are required to act on our Environmental policy, re-cycle our costumes, props and sets wherever possible and ensure all day to day operations are lessening the impact of our carbon footprint

Expectations that we will work towards becoming more environmentally sustainable delivering on Goal 3, and requirement to report through JB

Arts Council England - Environmental Policy, Action Plan and IG Tools reporting required and in place. AGMA, Manchester City Council, The University of Manchester - evidence of good environmental policy and practice is expected and encouraged

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

Creative Scotland's Environment Connecting Theme requires us to measure and report our 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

Interestingly, comments also raised some inconsistencies in relation to requirements.

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

Furthermore, organisations highlighted there may be environmental conditions for short-term grants for specific items or projects outwith the usual funding streams. Since they were already monitoring and collecting data for other funders, further small grant reporting was not too much additional work.

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.

We are 50%/ 50% funded by Bournemouth Borough Council and Arts Council England. We have obligations to ACE but none to Bournemouth Borough Council re environmental sustainability. We are however, setting our own environmental standards and projects

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

We are an ACE NPO, so the usual conditions apply. For Bristol City Council Key Arts Provider (KAP) funding we had to demonstrate in our application how we would contribute to priorities including "Contribution to supporting Bristol's approach to an economically, socially and environmentally sustainable future" and demonstrate "Environmental management and sustainability". Applications are scored on: "Does the organisation have an environmental/sustainability policy? Or do they show an active aim of reducing their environmental impact and become more sustainable?"

We submit a report to JB alongside the ACE annual return showing our ongoing and growing commitment to environmental sustainability as a company

Headlines: Sustaining Creativity Survey 2017

TABLE 2.5: HEADLINES FROM THE CREATIVE SECTOR

92%

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

84%

have an up-to-date environmental policy

36%

of environmental policies refer to specific emissions reductions or other policy targets

48%

have a Green Team or Green Champion

38%

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

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

83%

report organisational benefits from their environmental actions

The Respondents

Over three-quarters (77%) of all respondents are in senior or directorial positions.

TABLE 2.6: POSITION IN THE ORGANISATION*

Executive Director / Director	47%
Senior Management	30%
Operational	7%
Administration and support	7%
Artist, freelancer	1%
Other	8%

Based on 436 responses

*Organisational positions in 2014 were uncategorised

Respondents identified senior staff as the primary driving force behind environmental improvements in the organisation (68%) while also acknowledging the contribution of operational staff (18%) and the board/trustees (10%).

TABLE 2.7: DRIVING CHANGE

Board/trustees	10%
Senior staff	68%
Operational staff	18%
Freelancers	0%
Artists	3%
Audiences / consumers	1%

Based on 330 responses

The spread of activities highlights the diversity and overlap within the creative industries. The main activities of the responding organisations are as follows.

TABLE 2.8: MAIN ACTIVITIES OF THE ORGANISATION

Producing / publishing / releasing artistic or cultural work	43% (56%)
Operating a building / venue	39% (47%)
Promoting / producing festivals / events	34% (30%)
Touring	22% (31%)
Funding, representing or developing the sector	16% (14%)
Other	22% (12%)


Based on 433 responses

A number of organisations (22%) believed they operated in additional areas not covered by the prescribed categories and wished to expand on the elements of their activities. This included strong representation from: artist management and development; audience development; Bridging organisations; campaigning; collaborative and interdisciplinary practices; collections management; conservation; consultancy and development; co-producing professional programmes with local partners, including outreach; delivering projects for people with complex needs; providing and lobbying for arts education in schools; supplying clothing to venues and events; support networks delivering advice, industrial relations, support, and training; trade bodies representing certain sections of the creative industries; and youth participation.

Sustainable Practices

The cultural sector has a wide range of environmental sustainability practices in place at all organisational stages and across all activities. The level of activity varies (see Table 2.9) but the key message is that environmental sustainability is seriously considered by organisations.

TABLE 2.9: EMBEDDED ENVIRONMENTAL SUSTAINABILITY PRACTICES



%	
94%	Consider sustainability when selecting suppliers and service providers (93%)
83%	Consider sustainability when producing work or programmes (e.g. when sourcing materials to build exhibitions or stage sets) (89%)
81%	Measure their environmental impacts (84%)
80%	Consider sustainability for building refurbishment or capital projects (88%)
79%	Consider sustainability when making creative decisions (n/a)
75%	Communicate their green activities externally (80%)
70%	Consider sustainability when making decisions about sponsors (n/a)
65%	Consider sustainability when making investment decisions or choosing financial services (n/a)
55%	Engage artists and freelancers in environmental sustainability efforts (n/a)
52%	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) (63%)
52%	Belong to networks or groups of organisations collaborating on environmental sustainability (n/a)
38%	Include environmental sustainability in job descriptions (n/a)

Based on 323 responses. % relates to respondents answering 'yes' and 'sometimes'.

The Future of the Sector /

The appendix contains all the personal vision quotes for an environmentally sustainable creative sector. Might be nice in your redesign to select some good quotes and use them in between each chapter/section.

3: Sub-Sector Profiles

This Section details the diversity in the creative sector and the sector's sub-sector profiles.

There are some essential differences among the sub-sectors but they also have many things in common. For example, organisations with a focus on touring will encounter the same challenges, regardless of artform or sub-sector; touring theatre and a touring art shows will encounter similar travel and logistics issues; operating a building/venue requires managing energy, waste, visitor impacts and so on. Creative organisations also experience different environmental impacts.

In 2017, sub-sector categories were expanded compared to those in 2014. A categorical comparison by year is provided in the below table (see Table 3.1).

The 2017 findings are fairly consistent with the 2014 findings. Those organisations that were concerned with environmental sustainability continue to be. In the last three years there has been a slight increase in its reported importance and a similar slight increase in reported actions. Environmental sustainability in all sub-sectors was **chiefly driven by senior staff and all sub-sectors cared most climate change and clean energy**.

TABLE 3.1: SUB-SECTOR CATEGORIES

Sub-sector	2014			2017		
	Included	%	No.	Included	%	No.
Combined Arts	✓	23%	78	✓	32%	131
Dance	✓	6%	21	✓	6%	24
Design	✗	–	–	✓	1%	3
Fashion	✗	–	–	✓	1%	2
Literature/spoken word	'Literature'	4%	13	✓	4%	15
Media/Broadcast/Film/TV	✗	–	–	✓	2%	6
Museums and Heritage	'Museums'	7%	23	✓	6%	25
Music	✓	17%	56	✓	16%	64
Theatre	✓	30%	103	✓	23%	94
Visual Arts	✓	13%	43	✓	11%	43
	Based on 337 responses			Based on 407 responses ⁷		

⁷ Three of the sub-sectors – Design, Fashion and Media/Broadcast/Film/TV had very low response rates (1%, 1% and 2% respectively) and so cannot claim to be representative of the sub-sector. To include them in a sub-sector profile would be misleading and as such have been omitted

Combined Arts

The following highlights the headline figures from the sub-sector.

COMBINED ARTS

32%

of respondents

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

85%

have an up-to-date environmental policy

51%

have a Green Team or Green Champion

80%

have experienced benefits from environmental actions

76%

have collaborated on environmental sustainability

79%

measure their environmental impacts

39%

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

79% of respondents reported as Director or Senior Management level.

38% 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 and 13% generate their own renewable energy.

Primary areas for additional time or money to environmental sustainability over the next three years:

-
- Day-to-day operations and efficiencies
-
- Programming / creating work
-
- Waste management
-

Primary priorities for future improvement:

-
- Developing audiences / visitors / consumers
-
- Developing new sources of income
-
- Developing creative work or programmes
-

Primary drivers of environmental sustainability in near future:

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

Top 3 challenges:

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

Top 3 support requirements:

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

Top 3 collective actions that could accelerate engagement with climate change across the cultural and creative sector:

-
- Developing a shared vision or action plan for the sector
-
- Developing a community of peers that provide opportunities to share practice and network
-
- Developing collective procurement options for greener products and services
-

Dance

The following highlights the headline figures from the sub-sector.

DANCE

6%

of respondents

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

95%

have an up-to-date environmental policy

47%

have a Green Team or Green Champion

73%

have experienced benefits from environmental actions

63%

have collaborated on environmental sustainability

83%

measure their environmental impacts

18%

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

75% of respondents reported as Director or Senior Management level.

11% 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 and 11% generate their own renewable energy.

Primary areas for additional time or money to environmental sustainability over the next three years:

-
- Day-to-day operations and efficiencies
-
- Measuring and monitoring of impacts
-
- Waste management
-

Primary priorities for future improvement:

-
- Developing audiences / visitors / consumers
-
- Developing new sources of income
-
- Developing creative work or programmes
-

Primary drivers of environmental sustainability in near future:

-
- The commitment of staff or senior management
-
- Compliance with regulations or funders
-
- Reduced costs
-

Top 3 challenges:

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

Top 3 support requirements:

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

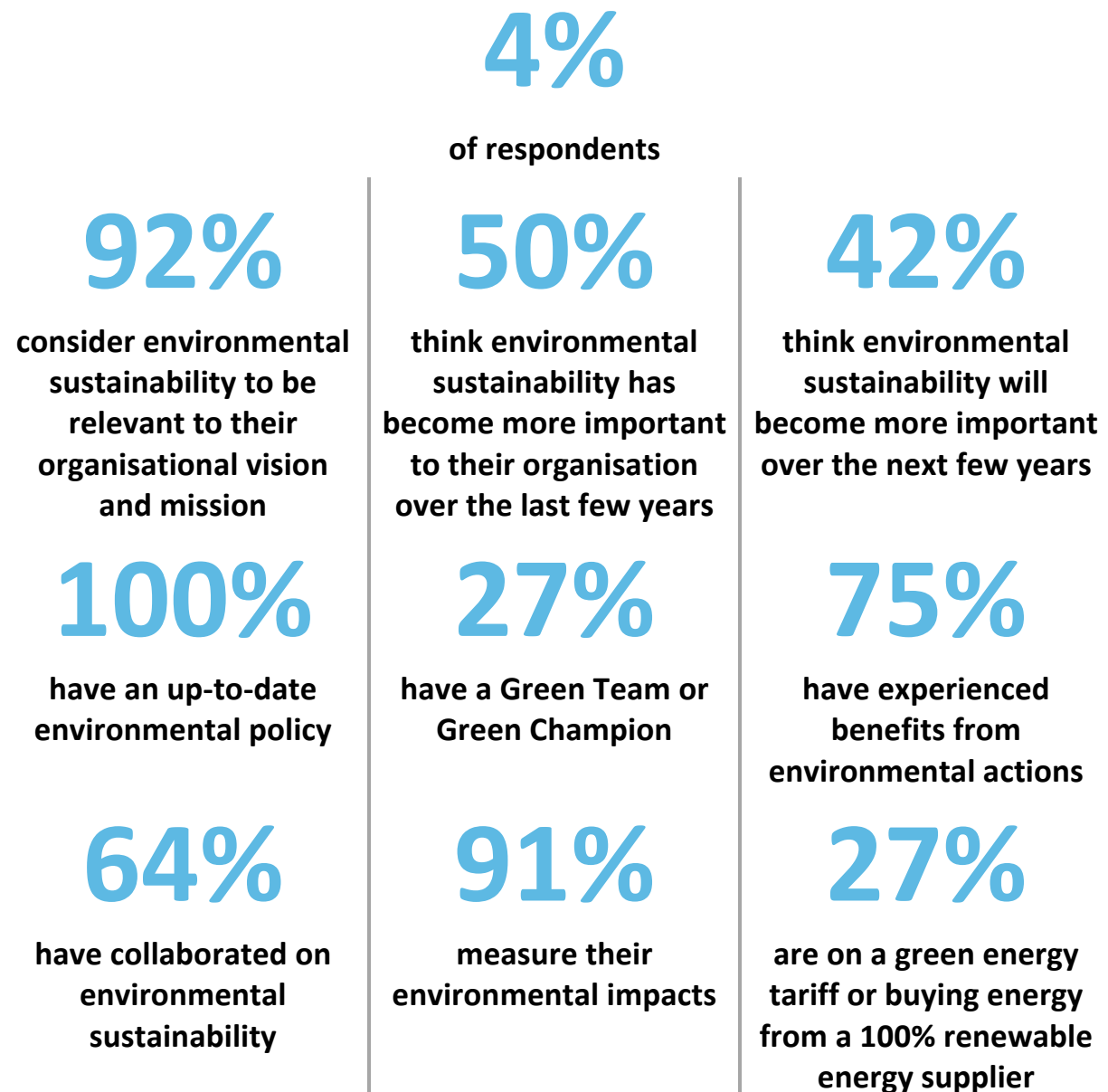
Top 3 collective actions that could accelerate engagement with climate change across the cultural and creative sector:

-
- Developing a shared vision or action plan for the sector
-
- Working with funders to introduce new investment and incentives
-
- Shared training or support to enable better advocacy and communication
-

Literature/Spoken Word

The following highlights the headline figures from the sub-sector.

LITERATURE/SPOKEN WORD



100% of respondents reported as Director or Senior Management level.

36% 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 and none generate their own renewable energy.

Primary areas for additional time or money to environmental sustainability over the next three years:

-
- Day-to-day operations and efficiencies
-
- Programming / creating work
-
- Sustainable production
-

Primary priorities for future improvement:

-
- Developing new sources of income
-
- Developing audiences / visitors / consumers
-
- Developing creative work or programmes
-

Primary drivers of environmental sustainability in near future:

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

Top 3 challenges:

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

Top 3 support requirements:

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

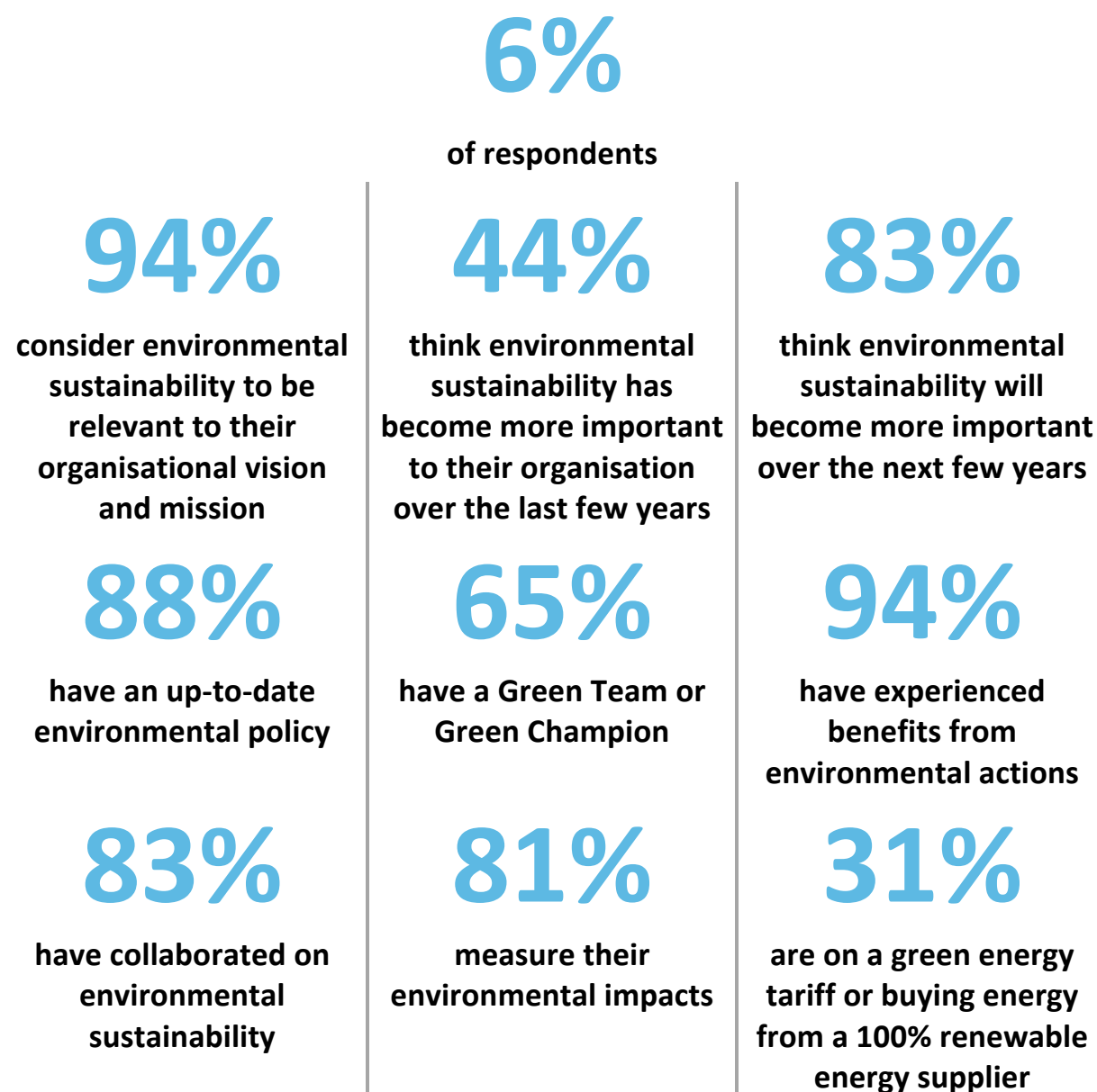
Top 3 collective actions that could accelerate engagement with climate change across the cultural and creative sector:

-
- Developing a shared vision or action plan for the sector
-
- Joint awareness-raising to the general public
-
- Co-programming and co-creating work on environmental themes with others
-

Museums and Heritage

The following highlights the headline figures from the sub-sector.

MUSEUMS AND HERITAGE



80% of respondents reported as Director or Senior Management level.

35% 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 and 28% generate their own renewable energy.

Primary areas for additional time or money to environmental sustainability over the next three years:

-
- Day-to-day operations and efficiencies
-
- Measuring and monitoring of impacts
-
- Capital development
-

Primary priorities for future improvement:

-
- Developing new sources of income
-
- Developing audiences / visitors / consumers
-
- Improving diversity
-

Primary drivers of environmental sustainability in near future:

-
- The commitment of staff or senior management
-
- Mission or creative vision
-
- Compliance with regulations or funders
-

Top 3 challenges:

-
- Accessing external funding
-
- Capacity
-
- Skills or knowledge
-

Top 3 support requirements:

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

Top 3 collective actions that could accelerate engagement with climate change across the cultural and creative sector:

-
- Developing a shared vision or action plan for the sector
-
- Joint awareness-raising to the general public
-
- Working with funders to introduce new investment and incentives
-

Music

The following highlights the headline figures from the sub-sector.

MUSIC

16%

of respondents

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

57%

have an up-to-date environmental policy

32%

have a Green Team or Green Champion

75%

have experienced benefits from environmental actions

62%

have collaborated on environmental sustainability

60%

measure their environmental impacts

45%

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

81% of respondents reported as Director or Senior Management level.

22% 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 and 16% generate their own renewable energy.

Primary areas for additional time or money to environmental sustainability over the next three years:

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

Primary priorities for future improvement:

-
- Developing audiences / visitors / consumers
-
- Engaging with new technologies and digital media
-
- Developing new sources of income
-

Primary drivers of environmental sustainability in near future:

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

Top 3 challenges:

-
- Capacity
-
- Accessing external funding
-
- Skills or knowledge
-

Top 3 support requirements:

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

Top 3 collective actions that could accelerate engagement with climate change across the cultural and creative sector:

-
- Developing a shared vision or action plan for the sector
-
- Developing a community of peers that provide opportunities to share practice and network
-
- Working with funders to introduce new investment and incentives
-

Theatre

The following highlights the headline figures from the sub-sector.

THEATRE

23%

of respondents

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

89%

have an up-to-date environmental policy

54%

have a Green Team or Green Champion

87%

have experienced benefits from environmental actions

79%

have collaborated on environmental sustainability

93%

measure their environmental impacts

34%

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

76% of respondents reported as Director or Senior Management level.

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 and 18% generate their own renewable energy.

Primary areas for additional time or money to environmental sustainability over the next three years:

-
- Day-to-day operations and efficiencies
-
- Measuring and monitoring of impacts
-
- Waste management
-

Primary priorities for future improvement:

-
- Developing audiences / visitors / consumers
-
- Developing new sources of income
-
- Improving diversity
-

Primary drivers of environmental sustainability in near future:

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

Top 3 challenges:

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

Top 3 support requirements:

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

Top 3 collective actions that could accelerate engagement with climate change across the cultural and creative sector:

-
- Developing a shared vision or action plan for the sector
-
- Developing a community of peers that provide opportunities to share practice and network
-
- Developing collective procurement options for greener products and services
-

Visual Arts

The following highlights the headline figures from the sub-sector.

VISUAL ARTS

11%

of respondents

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

97%

have an up-to-date environmental policy

41%

have a Green Team or Green Champion

84%

have experienced benefits from environmental actions

75%

have collaborated on environmental sustainability

94%

measure their environmental impacts

36%

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

77% of respondents reported as Director or Senior Management level.

34% 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 and 6% generate their own renewable energy.

Primary areas for additional time or money to environmental sustainability over the next three years:

-
- Day-to-day operations and efficiencies
-
- Programming / creating work
-
- Organisational strategy
-

Primary priorities for future improvement:

-
- Developing new sources of income
-
- Developing audiences / visitors / consumers
-
- Developing creative work or programmes
-

Primary drivers of environmental sustainability in near future:

-
- The commitment of staff or senior management
-
- Compliance with regulations or funders
-
- Reduced costs
-

Top 3 challenges:

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

Top 3 support requirements:

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

Top 3 collective actions that could accelerate engagement with climate change across the cultural and creative sector:

-
- Working with funders to introduce new investment and incentives
-
- Developing a shared vision or action plan for the sector
-
- Developing a community of peers that provide opportunities to share practice and network]
-

Sub-Sector Analysis

The following four tables provide further sub-sector analysis relating to reported turnover, subsidy level, type of activity, and green energy penetration.

Museums and Heritage is the highest earning sub-sector, followed by Music and to a lesser, but notable extent, Theatre.

TABLE 3.2: SUB-SECTOR, BY TURNOVER BANDING

	< £500k	£500k - £1m	£1m - £5m	£5m £10m	> £10m
Combined Arts	45%	15%	25%	6%	9%
Dance	27%	36%	27%	5%	5%
Literature/spoken word	87%	7%	7%	0%	0%
Museums and Heritage	13%	8%	29%	21%	29%
Music	38%	13%	21%	8%	20%
Theatre	43%	9%	20%	14%	14%
Visual Arts	50%	5%	38%	5%	2%

Based on 382 responses

Table 3.3 shows that other than the Music, most sub-sectors are heavily subsidised in some form or another.

TABLE 3.3: SUB-SECTOR, BY SUBSIDY LEVEL

	Public sector grants or funding income		
	None	< 50%	> 50%
Combined Arts	16%	50%	34%
Dance	9%	52%	39%
Literature/spoken word	7%	47%	47%
Museums and Heritage	8%	40%	52%
Music	61%	31%	8%
Theatre	15%	55%	29%
Visual Arts	10%	45%	45%

Based on 384 responses

It was also important to investigate whether the activities reported by sub-sectors were substantially different.

Unsurprisingly, Museums and Heritage (60%), Theatre (52%), and Visual Arts (49%) sub-sectors reported high levels of operating a building / venue. The sub-sector that toured the most was Dance (54%) and by a significant margin. Combined Arts (54%) and Literature / spoken word (53%) reported the highest levels of promoting / producing festivals / events.

TABLE 3.4: ACTIVITY, BY SUB-SECTOR

	Combined Arts	Dance	Literature / spoken word	Museums and Heritage	Music	Theatre	Visual Arts
Operating a building / venue	38%	25%	27%	60%	30%	52%	49%
Producing / publishing / releasing artistic or cultural work	39%	63%	47%	28%	30%	61%	58%
Touring	17%	54%	0%	4%	25%	37%	16%
Promoting / producing festivals / events	54%	29%	53%	12%	40%	15%	26%
Funding, representing or developing the sector	19%	29%	20%	28%	10%	4%	23%
Other (please specify)	19%	8%	27%	32%	11%	18%	9%

Based on 393 responses

Sub-sector differences between responding organisations on a green energy tariff or buying energy from a 100% renewable energy supplier, are of particular interest. Table 3.5 shows green energy by sub-sector breakdown, highlighting the various levels of penetration.

TABLE 3.5: GREEN ENERGY TARIFF/FROM A 100% RENEWABLE ENERGY SUPPLIER BY SUB-SECTOR

Sub-sector	%
Music	45%
Combined Arts	39%
Visual Arts	36%
Theatre	34%
Museums and Heritage	31%
Literature/spoken word	27%
Dance	18%

Based on 287 responses

The Future of the Sector /

The appendix contains all the personal vision quotes for an environmentally sustainable creative sector. Might be nice in your redesign to select some good quotes and use them in between each chapter/section.

4: Sustaining Creativity: Present and Future

This Section explores the attitudes, actions, drivers and progress relating to environmental sustainability across the sector. It also examines the perceived benefits reported by creative organisations.

In order to establish the status and relevance of environmental sustainability to creative organisations, and the cultural sector more widely, the survey explores the attitudes, actions, drivers and progress reported by responding organisations.

Attitudes

When asked about the environmental issues they cared most about, nine out of ten responding organisations cared about climate change and clean energy (89%). They also expressed concern for the following areas: social / climate justice (42%); biodiversity loss and conservation (41%); air pollution (37%); waste, toxicity, and the circular economy (37%); trees, forests and nature protection (32%); intensive farming and sustainable food production (21%); extreme weather events (15%); and the ocean (14%).

TABLE 4.1: ENVIRONMENTAL CONCERNS*

	%
Climate change and clean energy	89%
Social / climate justice	42%
Biodiversity loss and conservation	41%
Air pollution	37%
Waste, toxicity, and circular economy	37%
Trees, forests and nature protection	32%
Intensive farming and sustainable food production	21%
Extreme weather events	15%
The ocean	14%
Other	4%

Based on 326 responses
*not asked in 2014

Responding organisations believed it was difficult to disentangle these elements and many explained that they were all interlinked and that climate change and clean energy exacerbates or drives most of the others.

It requires the political and social willpower to change from a fossil fuel based economy

In interview, key cultural sector stakeholders discussed their approach to environmental sustainability and their comments highlighted a genuine concern for sustainable practices within their organisations.

Simple – it's about doing the right thing as far as possible within budgets and commitments

Environmental sustainability is a strong organisational concern and our target is a 25% reduction in carbon

There are two main branches. The first relates to the building – investment in hardware and the building in order to reduce our carbon footprint, we've spent a lot (£2m) over the last 18 months (CCHP plant). The second is behavioural change. We are also concerned with the programming side

It's a regional museums partnership, that's nine very different physical spaces to think about and very diverse collections. Our green champions group advocates and are critical friends who look at all aspects of green activities. There are 2 strands; a genuine concern for the global environment and cash

Environmental Sustainability Practices

Table 4.2 highlights the reported environmental sustainability practices in both 2014 and 2017. The table shows some interesting progress made between Sustaining Creativity survey waves. Across the categories, reported actions are fairly consistent. However, looking more closely at the responses, we can see that there has been a noticeable shift towards the frequency of actions; the change from answering 'sometimes' to answering 'yes'. In 2017, compared to 2014, responding organisations are more likely to be engaged in and planning for, environmental activity, more of the time. Rather than organisations reporting they sometimes do something, far more are reporting that they do it; the swing is quite striking.

These figures, more than any others, shows the level of change and the progress made in the last 3 years.

TABLE 4.2: EMBEDDED ENVIRONMENTAL SUSTAINABILITY PRACTICES, 2014 AND 2017

Actions	2017			2014		
	Yes	Sometimes	=	Yes	Sometimes	=
Consider sustainability when selecting suppliers and service providers	68%	26%	94%	31%	62%	93%
Consider sustainability when producing work or programmes (e.g. when sourcing materials to build exhibitions or stage sets)	50%	33%	83%	28%	61%	89%
Measure their environmental impacts	57%	24%	81%	27%	57%	84%
Consider sustainability for building refurbishment or capital projects	70%	10%	80%	54%	34%	88%
Consider sustainability when making creative decisions	42%	37%	79%	n/a	n/a	n/a
Communicate their green activities externally	36%	39%	75%	23%	57%	80%
Consider sustainability when making decisions about sponsors	43%	27%	70%	n/a	n/a	n/a
Consider sustainability when making investment decisions or choosing financial services	42%	23%	65%	n/a	n/a	n/a
Engage artists and freelancers in environmental sustainability efforts	30%	25%	55%	n/a	n/a	n/a
Create or commission work or programmes whose subject matter is environmental sustainability or related issues (e.g. staging a play about the	23%	29%	52%	7%	56%	63%

impact of climate change)						
Belong to networks or groups of organisations collaborating on environmental sustainability	41%	11%	52%	n/a	n/a	n/a
Include environmental sustainability in job descriptions	24%	14%	38%	n/a	n/a	n/a
*n/a represents answer categories not offered in 2014	Based on 323 responses			Based on unknown responses		

As an example, if we focus on organisations reporting that they measure their environmental impacts.

In 2014, 84% of organisations reported that they measure their environmental impacts and in 2017, the figure was broadly similar at 81%. However, in the last three years, those reporting that they only 'sometimes' measure their environmental impacts has dropped from 57% to 24%, meanwhile those reporting that they regularly measure their environmental impacts has seen a corresponding rise from 27% to 57%.

Actions are becoming more concrete.

Actions	2017			2014		
	Yes	Sometimes	=	Yes	Sometimes	=
Measure their environmental impacts	57%	24%	81%	27%	57%	84%

The following table (Table 4.3) is an extension of Table 2.9 and shows actions reported by responding organisations, by level of subsidy. The level of activity varies depending on subsidy and generally, subsidised organisations enjoy higher levels of embedded sustainability practices, than non-subsidised organisations.

Like results in 2014, it appears that in 2017, subsidised organisations are still leading the way in terms of developing and maintaining environmental practices.

At the 50% threshold however, the level of that subsidy is not relevant but those organisations receiving some level of public funding are doing more than those organisations receiving no funding. These figures further reinforce the idea that environmental conditions of funding are a strong driver of change.

TABLE 4.3: EMBEDDED ENVIRONMENTAL SUSTAINABILITY PRACTICES, BY SUBSIDY LEVEL

Actions	All	Public sector grants or funding income		
		None	< 50%	> 50%
Consider sustainability when selecting suppliers and service providers	94%	89%	95%	94%
Consider sustainability when producing work or programmes (e.g. when sourcing materials to build exhibitions or stage sets)	83%	64%	86%	89%
Measure their environmental impacts	81%	61%	88%	86%
Consider sustainability for building refurbishment or capital projects	80%	76%	86%	73%
Consider sustainability when making creative decisions	79%	70%	79%	84%
Communicate their green activities externally	75%	64%	79%	75%

Consider sustainability when making decisions about sponsors	70%	55%	71%	78%
Consider sustainability when making investment decisions or choosing financial services	65%	58%	65%	68%
Engage artists and freelancers in environmental sustainability efforts	55%	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)	52%	38%	56%	53%
Belong to networks or groups of organisations collaborating on environmental sustainability	52%	57%	56%	45%
Include environmental sustainability in job descriptions	38%	32%	46%	32%

Based on 323 responses. % relates to respondents answering 'yes' and 'sometimes'.

Similarly, the environmental practices of responding organisations were examined by the type of activity in which they were engaged. Table 4.4 shows all actions by reported main activities.

Unsurprisingly, those operating a building / venue almost always (98%) consider sustainability for building refurbishment or capital projects.

There are prominent levels of action across all activities and there is little variance across categorical activities, compared to the overall figures.

• Activity 1: Operating a building / venue
• Activity 2: Producing / publishing / releasing artistic or cultural work
• Activity 3: Touring
• Activity 4: Promoting / producing festivals / events
• Activity 5: Funding, representing or developing the sector
• Activity 6: Other

TABLE 4.4: EMBEDDED ENVIRONMENTAL SUSTAINABILITY PRACTICES, BY ACTIVITY

Actions	All	Main Activities					
		1	2	3	4	5	6
Consider sustainability when selecting suppliers and service providers	94%	95%	97%	93%	95%	93%	96%
Consider sustainability when producing work or programmes (e.g. when sourcing materials to build exhibitions or stage sets)	83%	83%	91%	90%	87%	84%	86%
Measure their environmental impacts	81%	88%	88%	88%	79%	80%	76%
Consider sustainability for building refurbishment or capital projects	80%	98%	84%	74%	78%	81%	80%
Consider sustainability when making creative decisions	79%	73%	84%	85%	87%	84%	89%

Communicate their green activities externally	75%	77%	81%	73%	79%	84%	81%
Consider sustainability when making decisions about sponsors	70%	65%	72%	77%	79%	72%	75%
Consider sustainability when making investment decisions or choosing financial services	65%	62%	69%	65%	66%	78%	84%
Engage artists and freelancers in environmental sustainability efforts	55%	51%	58%	53%	60%	62%	59%
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)	52%	51%	55%	49%	66%	60%	51%
Belong to networks or groups of organisations collaborating on environmental sustainability	52%	56%	52%	43%	57%	56%	61%
Include environmental sustainability in job descriptions	38%	40%	39%	32%	33%	30%	57%

The level of activity varied across regions, but as in 2014, many regions have relatively small response rates. This means that despite relative regional numbers having improved in 2017, the regional data is still not as reliable as we would like. To be confident in drawing regional comparisons, higher responses are needed outwith the regions of London, North West, South East, South West, and Yorkshire & The Humber.

Actions

Responding organisations further highlighted a huge variety of actions they had undertaken in relation to environmental sustainability. The range of actions is explored under the following headings to aid understanding:

1. **Comparative Action;**
2. **Effective and Innovative Action;**
3. **Unsuccessful Action.**

1. Comparative Action

Essentially, most responding organisations think they are not lagging behind others in the creative community when it comes to environmental sustainability. Most self-identified as doing at least as much as their creative peers, if not more.

TABLE 4.5: COMPARISON WITH OTHER ORGANISATIONS

	Compared to those within your art form or subsector (%)	Compared to other art forms or subsectors (%)
We do less than most	3.9%	8.6%
We do the average	38.4%	38.8%
We do more than most	35.0%	19.1%
I don't know	22.7%	33.5%
	Based on 331 responses	Based on 325 responses

Understandably, a high percentage of responding organisations felt they could not intelligently comment on the actions of others within their sub-sector and fewer could answer when asked to compare to a different subsector.

As in 2014, the 2017 results were examined within their sub-sectors to provide further insight. Because of the nature of environmental sustainability, it is possible that the more you engage, the more you understand the scale of the issue, therefore the less you perceive yourself to be doing. In 2014, this certainly seemed to be the case: those sectors reporting higher levels of activity perceived themselves to be doing less than others. In 2017, perceptions seem to have shifted closer to levels of reported activity, which might indicate a deeper understanding of what acting on environmental sustainability entails.

TABLE 4.6: COMPARISON WITH OTHER ORGANISATIONS, BY SUB-SECTOR

Sub-sector	Compared to those within your art form or subsector (%)				Compared to other art forms or subsectors (%)			
	More than most	Same as most	Less than most	Don't know	More than most	Same as most	Less than most	Don't know
Combined Arts	35%	29%	7%	30%	19%	35%	7%	39%
Dance	11%	53%	5%	32%	11%	47%	5%	37%
Literature/spoken word	8%	50%	0%	42%	0%	58%	0%	42%
Museums and Heritage	44%	44%	0%	12%	35%	29%	6%	29%
Music	30%	40%	5%	25%	10%	37%	24%	29%
Theatre	39%	50%	1%	10%	22%	46%	7%	25%
Visual Arts	34%	31%	6%	28%	22%	34%	6%	38%
Other	52%	29%	0%	19%	29%	18%	6%	47%
	Based on 331 responses				Based on 325 responses			

2. Effective and Innovative Action

Responding organisations were asked what kind of effective, innovative or pioneering environmental actions they had taken on climate change. Very positively, nearly two-thirds elaborated on these activities and there was an extensive range of responses.

The key effective and innovative actions are outlined below.

TABLE 4.7: KEY EFFECTIVE AND INNOVATIVE ACTIONS

Day to day operations	Most commonly reported actions were small physical changes and sustained changes to working practices: actions on energy, lighting, water, waste; recycling; technology and remote working; travel reduction; supply chains; and wider activities; encouraging staff to consider more environmentally sustainable travel
Capital investments	The larger scale projects echo the smaller scale actions of day to day operations but scaled up and rolled out to capital or multi-venue projects. An element of this approach was staff engagement and awareness raising, often involving organisation-wide training

Organisational strategy	There was clear evidence of an evolution of organisational strategies and a cultural shift towards routinely embedded, holistic activities within organisations and across the sector. Organisations highlighted environmental sustainability was now an embedded, overarching feature of strategic considerations, be they developmental or established
Sustainability as performance	A core feature of innovation involved extensive creative work; programmes, performances, events and installations with environmental sustainability as a main theme. Within this performative theme was a strong educational and engagement element
Partnerships	Peer partnerships were one of the innovative actions reported by the sector and often involved joining existing partnerships or founding new collaborative partnerships. These allowed creative and practical knowledge sharing
	Larger scale partnerships mirroring the smaller scale peer partnerships but often operating regionally or nationally. Often involved development, engagement or campaigning elements
Incremental progress	Not to be underestimated. Many positives despite organisations under-valuing the innovative nature of their progress

A small number of organisations explained that their current changes feel fairly 'operational' so there was limited 'excitement' surrounding them.

Nothing innovative or exciting; we just do what we can do

However, the vast majority were keen to highlight their interesting activities. Responses were thematically analysed to provide clearer evidence of what actions cultural organisations are taking and what they are most proud of. An array of undertakings became clear and the themes that emerged are explored below.

Day to day operations

By far the most commonly reported actions were relatively small but important actions relating to day to day operations. These were often physical, sustained changes to working environment or practices, geared towards environmental sustainability. Organisations frequently emphasised actions on energy, lighting, water, waste and recycling.

We have just renewed boilers, changed lighting and changed working practices to reduce environmental impact

We are continuing year-on-year to reduce energy use and waste production. Taking most of our internal projects and processes paperless (in Finance, Fundraising, Technical and Admin), and continuing to develop ways of reducing resource use. We have a printing system which has almost completely removed wasted printing, and are working on a Building Forecast Tool to help us communicate the 'weather forecast' for audiences coming to the building, so they can dress appropriately rather than expect a set level of comfort

Installation of solar panels, reducing water wastage, development and implementation of environmental action plan, presented work on the theme of climate change

Installed double glazing and created a new 'pocket park' and installed a sculpture which is designed to be habitable by birds and insects

Technology

Also mentioned were changes afforded by technological advances. Much more work now takes place remotely; significantly cutting business travel.

Becoming paperless and working remotely

Stopped flying inter-UK, even though it is often cheaper and always faster. We are a digitally based organisation which successfully works remotely using Cloud based technologies, reducing our overheads and environmental footprint

Sending film files via online drop box to avoid using courier companies

We no longer print wastefully, asking partners to bring notes electronically to meetings and our resources are on line as PDFs rather than printed

Supply chain

Organisations often went slightly further than their immediate environment and looked at their supply chain or wider activities.

All of our traders now use biodegradable cutlery

Moved our energy usage to 100% renewable companies. Use less paper, printing, sending post, and stopped using business cards. When we have to travel, review how to compensate for carbon emissions

Developed an outside broadcast vehicle that's 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)

Travel

Promisingly, many organisations were encouraging staff to consider more environmentally sustainable travel, both to and from work, and for work travel.

Encouraging audiences and staff to use car share, cycling and walking

The Environmental Champion created 'Motor-less Mondays', a catchy concept to help reduce the theatres staff travel emissions, using a usual busy day of the week (get-in day)

Reduced unnecessary travel and participating in the cycle scheme, encouraging cycling to work

We provided bikes for our visiting artists so they could cycle around the city which mostly went down really well

It is clear that these small everyday actions can collectively deliver significant impacts on a sector-wide scale. A principle noted by one of the responding organisations.

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

Capital investments

The cultural sector also highlighted the larger scale (macro) projects they had implemented or were currently undertaking. These mirrored the smaller scale actions of day to day operations but were scaled up and rolled out to capital or multi-venue projects.

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

Built a BREEAM compliant building, introduced cycling resources, composting on site, programmed touring performing work for children and adults on environmental topics. Built the theatre out of entirely recycled and reclaimed materials

Investing over £12m in more efficient plant and machinery with lower energy use and reduction of carbon. LED lighting, awareness campaign internally, staff sustainability forum

We recycled old tube carriages to convert them into co-working spaces - We've invested in a draught system in order to reduce our consumption of metal cans and plastic cups. We incentivise our staff to cycle or walk to work

The first solar powered recording studio in Europe

Staff training, engagement and awareness raising

An element of the sustainability approach was staff engagement and awareness raising, often involving organisation-wide training.

100% of employees carbon lit trained

Engaging staff and raising awareness through initiatives. One project engaged young people to communicate their views on sustainability

Staff engagement programmes = the Green Team

Organisational strategy

The changes highlighted in all day to day operations are indicative of wider changes within organisations and across the sector. It is evidence of the evolution of organisational strategies and a cultural shift towards routinely embedded activities and holistic practices. Many responding organisations highlighted that environmental sustainability was an embedded, overarching feature of strategic considerations. Some were beginning to take these strategic first steps.

We are right at the beginning of our environmental journey. We have just written an environmental policy and 5 year action plan, taking input and advice from other Council departments and Partners. We have re-evaluated our impact in many areas and thought about changes we can make going forwards

We're at a very early stage - but are encouraging initiatives such as use of public transport (e.g. arranging minibus transport to and from the nearest train station)

Others however, were much further along this path in a deliberate way.

Advocate a rethink of the way museums develop their holdings across the distributed national collection over the coming decades

[Organisation name] is committed to reducing our environmental impact and promoting sustainability in all areas of our work. As one of the world's leading arts and conference centres, we recognise that our day-to-day operations impact on the environment, local community and economy and we strive to integrate sound environmental and sustainable practices in everything we do. Major initiatives: - Working in line with the BS8091 Sustainable Event Management framework - Working to achieve the new international Sustainable Event Management accreditation - ISO20121 - Sending zero waste to landfill - Compositing 100% off all food waste - Offering commercial clients the option to introduce a food mile menu, sourcing all food from within 250miles of the venue. We also hosted two bee hives on our roof, alongside providing mini allotment spaces for staff and students on the roof of [another

building]. We have commissioned artists to produce work in our foyers which speak to the environmental issues that we work to manage across our operations.

The Green Team meets regularly to engage in environmental discussion and their enthusiasm and actions have brought about changes in attitude and raised awareness throughout the organisation

Brought it to the core of our organisation and put it in contracts that people have to sign up to it when working with us

Creation of an active Green team keeping things fresh and fun rather than great innovations

deep research leading to a local campaign and programme for 2018/9

Developed the Green Charter and guidance for orchestras

Embraced change - but the most impact has been from physical changes in response to consultation.

Developing a new environmental strand, will formally launch this spring

Developing an environmental action plan in line with our policy

development of a local energy business model to encourage the transition from fossil fuels in the energy market

Embedding our environmental principles in to our programming and operational processes

Embedding sustainability in our core narrative and practice

General sustainability infrastructure. Working towards becoming world's first carbon neutral theatre as part of long-term strategy.

Working through the implications of the Well-being legislation in Wales.

new position of sustainability lead created in 2016

Putting our environmental impact at the forefront of the planning of set building processes and international touring

Research into polycell panels being placed on the roof to capture energy - not yet implemented, but still on the agenda to be looked at.

Re-working of organisational Policy and Action Plan within the organisation. Working across outdoor network to share inspiration and innovation amongst partners.

The Green Team meets regularly to engage in environmental discussion and their enthusiasm and actions have brought about changes in attitude and raised awareness throughout the organisation.

Urging museums to adopt new Bizot guidelines on museum environmental conditions

We have achieved a 4-star Creative Green rating for 2015/2016 having been awarded a 2 star rating (out of 3) the previous year. We are delighted and hope to continue to find ways to make our Grade II* listed building more sustainable.

We have a strong internal sustainable development group who meets regularly to develop sustainability ideas and initiatives. Most recently we purchased a food composter for our cafe to compost any waste food rather than throwing it away.

We have changed over from Addison Lee to Green Car tomatoes- a commitment to lower emissions. We have changed over our lighting to eco friendly lighting- a commitment to lower emissions. We have a green team who meet monthly and whose task it is to implement green initiatives into our offices. A range of green products and services have already been procured with a view to change over to green tariff for electricity and gas this financial year when our contracts are finished, we invest in energy efficient white goods (our dishwasher and lighting).

'Polar Bear' campaign to promote switching off monitors at the end of the day with incentives for the office most committed to switching off their electricity. Our waste contractor recycles our waste. We received an award by [local borough] for our commitment to sustainability.

We have had shows that have been 90% repurposed, not just recycled. We have a framework that we use for production decisions whereby we interrogate our potential purchases/actions and change them if we can find a more sustainable solution - this framework is called 'The Green Prism'. A lot of decisions have been changed in the light of their CO2 impact. As we make work in different places we endeavour to spend locally wherever possible, and to employ locally. In our programs we have a page explaining our decisions including the future life of the set and props, we are after all answerable to our funders and audience for the actions that we make - we also have my email address there for anyone to write to if they want to respond

We have set up policies that can be used at each event promoting recycling / awareness of the effect and impact of us on the environment

Sustainability as performance

Unsurprisingly, a core feature of innovation involved extensive creative work; programmes, performances, events and installations with environmental sustainability as a main theme.

A whole set made out of junk found in the hedgerows! Feeding our audience foraged food! A show where the audience had to cycle the whole distance! Locally sourced vegetarian meals in rehearsals. Encouraging bus/walking to get to our events. Alfresco sleep-outs to reconnect with night time/nature. Campfire talks after show speakers about sustainable food. Moth walks. Wind turbines powering our performances. Cycle power generators lighting our shows

Programming a production which was about the effects of climate change. The show was entirely lit with power generated on stage by the cast

We are commissioning two new Shakespeare productions with a sustainability related setting. These will be major, mid-scale UK tours with significant reach and providing an opportunity and a platform for audience engagement

Educating audiences and consumers

Within the performative theme was a strong educational and engagement element.

Addressing climate change through education and making our visitors aware that we have put in place, and continue to develop, ways in which we can save energy and promote innovation in the environmental field

Teaching workshops and showing how to be responsible

Our Clean Campsite Competition - using positive and fun engagement to encourage campers to clean up their rubbish

We have commissioned an area educating public on dangers of climate change [at our free one day festival]. We are actively engaged in supporting grassroots events in the local area who are focusing on sustainability

For some organisations, this extended to higher education institutions.

Personally I have brought sustainability directly into the students learning by affecting the Learning Outcomes for their assessment and feedback. A new Learning Outcome that relates to Sustainability and ethics.

Partnerships

Peer partnerships were one of the innovative actions reported by the sector. Joining existing partnerships or networks and solidifying relationships, or even establishing these collaborative partnerships was seen as particularly pioneering. These links allowed organisations to collaborate creatively or practically; sharing costs or ideas and engaging in those important conversations.

Work with Groundwork Trust to improve recycling and reduce our costs

Working in partnership with Happy Museums to create a more resilient future for museums in the context of and in response to global challenges: climate change, resource depletion, financial instability and social justice

Working in partnership with local authority to provide electric car club

Working with partners to support young people writing about environmental issues

The cultural sector also highlighted larger scale or further reaching partnerships. These wider networks go a little further in terms development and engagement than the partnerships above and often included a campaigning element.

Being part of the 2020 EU network and supporting artists to create work within this context

We are establishing a partnership with Forestry Commission which will provide a context for artists' work as it relates to the environment

We have developed a number of research relationships with scientific bodies including the British Antarctic Survey, and cultural orgs such as the Arts Catalyst to develop creative thinking, processes and methods towards developing public engagement with climate change.

We support Eco Home Lab and Carbon Co-op, who do great stuff with low-cost tech. We have a cycle hub for local businesses, funded by TfGM. Working in Pakistan on a circular economy/ re-use project w/ Numaish Karachi, funded by the British Council

Leading collaborative project with 14 producing theatres over the last 6 years (and counting). Most exciting - sharing learning and peer support over a sustained period of time to deepen understanding, engagement and effectiveness

We have applied for an ERDF fund in partnership with two other major cultural institutions in our city region in a partnership to work together to decarbonise our buildings through a range of measures

We helped to start MCLEF [Manchester Cultural Leaders' Environmental Forum] which became MAST [Manchester Arts Sustainability Team]

Recorded our impact and worked with other organisations to campaign about environmental issues (specifically around Rivers and waters)

urban beekeeping campaign

In the early 2000s we launched our 'Carbon Web' analysis of how burning fossil fuels is bound up across sectors, including the cultural. This was groundbreaking, and the analysis has been used countless times by campaigner and affected communities to increase the effectiveness of their work.

We are about to launch a campaign about Aquatic litter and the use of plastics and incorporate these themes into our programme this year. We are collaborating with artist Maria Arceo who will be creating a giant footprint from plastic collected in the River Thames over the last year which will be the center point for our programme and will engage members of the audience through debate and workshops around litter and the use of plastics. In previous years we have led successful campaigns about litter "Clean for the Queen"

Continuing to do more of the above, creating a growing group of campaigners.

More campaigning and incorporating key themes into our programme. in 2017 we will be asking artists and event partners to respond to these themes to enhance our voice.

More campaigning on issues

Been part of the Europe Jazz Network's ongoing 'Take the Green Train' working group and signing up to its manifesto in 2015. Also being part of the EJN's subsequent tour in 2016 by saxophonist Evan Parker.

Developed an Environment and the Natural World series led by our Principal Conductor Esa-Pekka Salonen in 20/21

Helped develop and launched the Welsh Assembly's Sustainable Development Scheme. Developed the Re-use Zone where public can drop in a take away waste that can be repurposed. Purchased and shared with the community a thermal imaging camera to help reduce heat loss in buildings in and around the community.

JB audit > better cd production practice, energy saving in our building. moving to 'green servers'. our Energy Union project funded by EU was innovative. djing + artists for climate marches, Greenpeace etc.

Incremental progress

Even though some organisations did not believe they were breaking any new ground, there were still a great many positives coming through. Indeed, some organisations were self-deprecating or modest while highlighting significant progress.

Not a great deal to be honest. We are a small community arts organisation based in environmentally friendly offices. Two staff members are going on carbon literacy training in March 2017

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

It's not 'exciting' work – it's painstaking work re energy conservation in facilities which are not optimised in the first place retro fitting

Not sure it's particularly innovative, but we get all our power from renewable sources, including our web hosting (proud of that one). Climate change issues are at the core of what we do

Some of the responding organisations captured this principle succinctly.

I think 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!

Not one thing but many - every small positive change is important

Key stakeholder perspectives

Key cultural sector stakeholders expanded on the specific actions they had taken. It is clear to see the top down thinking when it comes to the key changes and interviewees discussed the range and scale of their efforts in detail.

We have a comprehensive policy, a statement of intent and the exec summary is on our website. Every programming, production, communications, or administration decision we make is put through a rigorous sustainability test.

We had a major refurbishment programme over the last few years (£10m capital) involving the infrastructure of the building (new boilers, heating, LED lighting, etc.) and worked with an environmental consultant. Target of 25% carbon reduction and developing a new environmental strategy alongside that. Also put on creative pieces now and then. We're a national organisation and should be a showcase for real and genuine change. We are always concerned with our procurement and we looked into a buy local supply chain, it didn't really work at the time but it's something we're looking at again in union with developing the current environmental strategy launching in summer/autumn 2017

The Julie's Bicycle report benchmark. A range; coal use, energy use etc. We're an open air working museum with open fires, steam boilers etc. We've tended to ignore it but now we're wading through it. It's allowed us aim for a 10% reduction by 2018

Everything from a consideration of cleaning chemicals to lights, to resources, to procurement

There's a huge list. We started in 2007, so we've been going for 10 years, the same as Julie's Bicycle. We have a strong sustainability policy that covers festival management and we have in place a full time sustainability co-ordinator. We work with Julie's Bicycle and we work in partnership with festival volunteers like Greenpeace and Friends of the Earth. We have incentive schemes and ticket competitions, we consider our usage and energy, telemetry on generators, 15% biodiesel, 3 bin waste management. Even our cleaning companies are keen on recycling targets. It's robust and holistic

3. Unsuccessful Action

The sector was also invited to volunteer any unsuccessful environmental actions they had pursued and to reflect on the possible reasons for the lack of success.

The key unsuccessful actions are outlined below.

TABLE 4.8: KEY UNSUCCESSFUL ACTIONS

Behavioural change	There were difficulties in attempting to fully engage staff and embed greener practices. Implementing actions that changes people's behaviour and habits in the long term is seen as a significant challenge
Location and immediate environment	There were limitations of immediate environment; the physical working space was often a rented studio, or serviced building. Frequent issues of control relating to the space; being unable to change spaces, associated systems or processes that they did not own
External environment	Barriers sometimes extended beyond the physical space to external statutory considerations; local authority or other agency requirements. The issue again, was a lack of control over processes
Capacity	Lack of time or other resources were reported as a significant barrier to drafting, adopting, embedding or delivering a cohesive approach to environmental sustainability
Engagement and communication	Engaging and communicating with other organisations or consumers was at times challenging. Some organisations admitted this may be an internal failing relating to the coherence of the message, others realised that engaging with consumers is a challenge in itself
Fashionable, short term initiatives	Environmental sustainability sometimes suffered due to initiatives that had been ill-devised or ill-prepared. Some responding organisations believed these initiatives or actions were pursued simply because they were in vogue, sometimes referred to as 'eco-bling'. Because they were deemed fashionable, reactionary, short-term or tokenistic attempts, they were less likely to be successful or sustained
Supply chains (access/availability/quality)	Access to, and availability of green services was seen as an issue for some responding organisations. Green supply chains were not as well developed as they could be and in some instances, the quality of green products was questionable
Financial viability	Financial viability was identified as a key barrier. Whether real or perceived, opinions on the overall value for money of a project or action show the cost-benefit ratio was deemed unfavourable for a number of environmental actions. While some organisations reported small practical changes yielding financial benefit, others highlighted issues of scale
Knowledge	Some responding organisations declared a 'trial and error' approach over the years in the absence of a more systematic approach. There continue to be issues of awareness and understanding of environmental sustainability.

Some responding organisations maintained that all the actions to date had been successful or it was too early to say.

Not aware of any unsuccessful actions

Most measures are either not practicable or have minimal effect as we are a micro-organisation

Most of what we have done has had some effect

Too early to say

Many did, however, elaborate in relation to the areas that simply hadn't worked or clearly needed improvement. This is an important learning opportunity not only for the individual organisations themselves but also for others across the creative sector. Responses were thematically analysed to highlight these areas more clearly.

Behavioural change

While not wholly successful or necessarily unsuccessful actions, responding organisations emphasised the difficulties they faced in attempting to engage their staff and embed greener practices.

Implementing actions that modified people's behaviour and habits in the long term is seen as a significant challenge.

Getting people to walk up the stairs and not use the lift

Change in staff behaviour through greater communication of relevant data. Need more detailed data so that staff can understand individual impact

Even getting staff to turn lights off proved difficult; moving to smart system for this

Cut down on switching off monitors at the end of the day only by 50%

Raising awareness and addressing behavioural change needs ongoing input and driving, the moment you stop people revert or stop considering how their actions impact on the environment

Location and immediate environment

Many organisations highlighted the limitations of their immediate environment; the physical working space was often a rented studio or a serviced building.

There were frequently issues of control relating to the space; being unable to change spaces, associated systems or processes that they did not own.

Becoming more energy efficient; this is very hard to do in a rented building

As we are a resident company within a building we don't have any say on how the building is run or its environmental policy. We can use the recycling facilities but that is about it. We aim as a company to do what we can - print less, recycle, re use set/ costumes/ props and turn off lights etc. but we have no control over our environment

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

Hard to engage our landlord in environmental matters beyond what they already decide to do - we are in serviced offices with very limited control

External environment

Similarly, barriers sometimes extended beyond the physical space to external statutory considerations; local authority or other agency requirements.

The issue again, was a lack of control over processes.

We have no local (town centre) waste disposal e.g. glass or plastic which our members (learning/ physically disabled) can get to. We had one in the nearby car park but it was removed as we used to take paper/ glass/ plastic/ tins there

Recycling of TRADE waste could be made easier by the local authority... despite our internal separation of recyclable materials, there is only a common single bin to deposit these in, undermining our confidence in them being recycled as we would wish

We have lost many recycling and, particularly, organic waste contractors over the years who either could not cope with our volumes or providing an efficient service. We tried composting but had to cease composting on site due to pest problems

For one responding organisation, external requirements did not go far enough.

Funders should use more sticks as well as the existing encouragement

Capacity

Many responding organisations raised capacity issues.

Lack of time or other resources were reported as a significant barrier to drafting, adopting, embedding or delivering a cohesive approach to environmental sustainability.

Our major barriers are in securing time to focus on bringing about change. There are pockets of real interest in the organisation, but gaining overall buy in against other significant priorities can be challenging

Difficult due to time restrictions and capacity to make it a priority

We have tried to adopt actions into our business plan but due to size of organisation and capacity of staff we can only do what fits intuitively with our existing work

We tried to implement a green board stand up monthly where we proposed and tracked the process of actions but it fell to the way side by other work pressures

Engagement and communication

Some of the responding organisations found that engaging and communicating with other organisations or their consumers was at times challenging.

Some organisations admitted this may be an internal failing relating to the coherence of the message, others realised that engaging with consumers is a challenge in itself.

Our responsibilities towards climate change form part of the framework of much of our decision making, however we are still trying to establish a bottom-line to build from. We acknowledge that we are influencers both with audiences and with industry professionals but our message is still not coherent

Getting the public engaged with sustainable farming

Working with the public been a bit hit and miss - need to get better at it

Communicating the value of our work beyond the sector - it doesn't feel like we've found a public platform to share what our achievements are

Fashionable, short term initiatives

A few organisations felt that environmental sustainability sometimes suffered due to initiatives that had been devised without proper thought or preparation.

Some responding organisations believed these initiatives or actions were pursued simply because they were in vogue, sometimes referred to as 'eco-bling'. Because they were deemed fashionable, reactionary, short-term or tokenistic attempts, they were less likely to be successful or sustained.

Ad hoc tokenistic programme initiatives. Effecting meaningful change requires long term and systemic action fully embedded within the organisation

Working to empower political strategies and policy. Climate solutions are long term and political will power is often fickle and short term

Supply chains (access/availability/quality)

Access to, and availability of green services was seen as an issue for some responding organisations.

Green supply chains were not as well developed as they could be and in some instances, the quality of green products was questionable.

Issues appear to arise in relation to service or product suppliers when environmental sustainability is not high on the agenda in other sectors or industries, or not embedded in processes.

Finding an environmental friendly international courier company

Buying sustainable/organic cotton goods that weren't good quality enough (T-shirts that shrank in the wash)

Using recycled print cartridges. They were dreadful

Communicating with suppliers asking for their environmental policies

Bio fuels for utility vehicles. Poor supply, quality and vehicle warranties void

Financial viability

Financial viability was identified as a key barrier by responding organisations. Whether real or perceived, the cost-benefit ratio was deemed unfavourable for a number of environmental actions. While some organisations reported small practical changes yielding financial benefit, others highlighted issues of scale. Economies of scale with regard to environmental actions or the creation of, or signposting to, subsidies might mitigate some of these issues.

I think we could do more but the incentives need to stack up financially

Investigated introduction of solar panels but cost outweighed predicted gain over payback period

The additional costs of sustainable items like collections for different recyclables are hard to push through finance, as is green energy

We have tried to improve our materials procurement, but tight budgets and artistic decisions have often forced us to take the cheapest option

We considered inclusion of PV's within capital refurbishment project but the cost of this against the benefit financially was not considered an effective investment

Lots of energy saving initiatives: 1) Installation of sub meters (as recommended by the Carbon Trust (we never had time to review the results of these or take action from the results. 2) We

installed Power Perfectors (voltage optimisation units) but these did not save the money promised and caused problems with our electricity supply. 3) Refurbishment of existing light fittings with LED lamps - these lamps were expensive, failed regularly and did not give us significant savings

When piloted or rolled out, some actions simply did not work or deliver the intended impact or benefits. These continue to be a challenge, encompassing situational issues, or issues of suitability

Waste management is a challenge

Recycled metal as people won't pay for products using it

Solar Panels on roof. Re-use of grey water. Both have minimal impact

Reducing energy consumption e.g. heating. This is difficult in a damp basement

We have tried to reduce international travel to lower our carbon footprint but this has been very hard to achieve without just saying no to opportunities

Knowledge

Some responding organisations declared their approach had been 'trial and error' over the years and one responding organisation succinctly captured what a number of other organisations had eluded to; issues of awareness and understanding of environmental sustainability.

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

Even when genuine attempts at environmental sustainability had been made; it appears traction was often lost due to some of the above issues.

Collaboration

The creative sector is a collaborative one and organisations highlighted that these co-operative relationships extended to environmental sustainability as well as their artistic partnerships. Indeed, high levels of collaboration were reported in the last few years; three-quarters of organisations (74%) reported collaborative practices, further evidenced and stratified below.

TABLE 4.9: COLLABORATION*

	%
Other arts organisations	40%
Artists	34%
Environmental consultants	31%
Local authority or policymakers	28%
Green charities or campaigning organisations	28%
Local community groups	22%
Research institutions or higher education	19%

Schools	11%
No - we have not worked with anyone	26%

Based on 330 responses
*not asked in 2014

A number of responding organisations elaborated on their current and previous collaborations. These collaborations involved: environmentally themed creative works; local authorities; independent utility bill auditors; recycling companies; environmental consultants; local community groups; ethical permaculture ventures; academics; architects; public transport companies; and various regional or thematic green programmes, initiatives and networks.

Many also described future plans to create or extend collaborations, partnerships or networks.

We have a project planned partnering with a University in 2017

We will be working with architects on a future capital refurbishment programme

Of those who had not collaborated, many were sole traders and others felt that despite their interest, barriers to collaboration still existed.

Many of our attendees and volunteers already work in and are aware of sustainability issues - we have always had willingness, just not always the financial resources

The Future of the Sector /

The appendix contains all the personal vision quotes for an environmentally sustainable creative sector. Might be nice in your redesign to select some good quotes and use them in between each chapter/section.

5: The Role of Julie's Bicycle

This Section discusses the role of Julie's Bicycle and the collaborative practices articulated by the creative sector.

In many cases, the impact and collaborations reported by responding organisations included Julie's Bicycle and the key impact of that contact is outlined below.

TABLE 5.1: THE ROLE OF JULIE'S BICYCLE

Strategic priorities and agenda setting for the sector	Julie's Bicycle allowed organisations to reconsider or reinforce environmental sustainability as strategic priorities; helping to redefine the green agenda across the sector. Partnership with Julie's Bicycle underpinned the importance of the actions taken by organisations
Events	Julie's Bicycle's events were highly regarded and were considered extremely informative on a range of topics
Networking, information sharing and knowledge exchange	Through Julie's Bicycle's events and other activities, responding organisations stressed the importance of the networking aspect of attending; information sharing and knowledge exchange
Resources and support	The resources and support available in the form of practical advice and assistance was highly valued by the creative sector. The IG Tool, Creative Green certification and informative webinars were regularly singled out for praise, as was the bespoke nature of the support and knowledge of staff
Webinars	The series of webinars conducted by Julie's Bicycle was an element of the web resources that drew very positive comments from responding organisations
Specialist sector specific knowledge	The creative sector highlighted the specialist sector specific knowledge offered by Julie's Bicycle. Staff familiarity and experience of the sector meant that they could direct organisations on the most appropriate way forward
Monitoring and audit	The opportunity to accurately self-monitor and audit organisational activities as a result of Julie's Bicycles tools and assistance was appreciated. Organisations remarked that it allowed for a clearer and more accurate understanding of organisational activities in relation to environmental sustainability

One key cultural sector stakeholder remarked that discussions with Julie's Bicycle have been incredibly useful.

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

In interviews, key cultural sector stakeholders discussed the measurement of their environmental impact and the reporting arrangements currently in place. Some were taking initial steps and there were admitted challenges, and for others there existed an awareness that systematising the processes was necessary to show benefits and ultimately achieve organisational success and transparency.

Measuring environmental impact is a big challenge. We measure statistics and environmental improvement wherever possible. It's about establishing a systematic decision-making process and improving that process. We include our monitoring information in Arts Council reports or to the Welsh Government if we receive funding from them. We can evidence the considerations taken. Hard to show, say a 10% reduction from one show to the next, because often they're incomparable

We report fully to ACE and JB

We're not very good at that but we've started. I suspect there's a lot more we can do

The JB benchmarking was a snapshot of where we are; we appointed a green group to set the actions in motion. To properly see the progress or change we might have to bring in JB again

We record what we can

We work with Julie's Bicycle (IG Tool etc.) and (De Montfort) University. We're accredited and transparent

For some creative organisations, Julie's Bicycle is their major partner and those organisations that had previously worked with Julie's Bicycle, used any of its resources, or attended any of its events articulated what had been most valuable. Overall, the comprehensive suite of assistance provided by Julie's Bicycle was positively regarded by responding organisations.

All helpful - website resources, training opportunities

All of it - events, research, workshops

All the resources online to help us write our own environmental policy and action plan and being able to phone and talk to them and ask for advice

We have previously worked with JB via ACE monitoring and attendance at a seminar - all useful.

More specifically, organisations highlighted the most useful contact with Julie's Bicycle.

This interaction included: strategic priorities and agenda setting for the sector; the events regularly hosted or facilitated by Julie's Bicycle; the associated networking and knowledge sharing; the wide-ranging resources and available support in the form of practical advice and assistance, particularly the IG Tool, Creative Green certification and informative webinars; the specialist sector specific knowledge; and the opportunity to accurately self-monitor and audit organisational activities as a result.

Strategic priorities and agenda setting for the sector

Contact with Julie's Bicycle allowed organisations to reconsider or reinforce environmental sustainability as a strategic priority, and as such helping to redefine the green agenda across the sector. Many organisations

highlighted that it underpinned the importance of their actions, and described how that had changed in recent years.

I wrote working with Julie's Bicycle into our business plan - so it's an action for now to take a look at our whole operation and lift the importance

Learning how we can make a difference collectively and alone

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 initial presentation was a real eye-opener and everything since has been useful

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

Events

Julie's Bicycle regularly host and facilitate events around the country and responding organisations found them to be very informative on a range of topics.

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

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

I have recently stepped into the sustainability role, and have recently filled in my first JB CIG Submission for 2015/16. I will be attending a JB Event at the end of Feb in Birmingham

I attended the day conference in Hammersmith last year which was incredibly helpful and encouraging

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

COOptimism event was inspiring and useful in terms of sharing knowledge, experience and best practice

As a disabled person I can only get to events in London that are easy to get to. When I have gone to events I have always found them interesting

Event at Royal Opera House about Sustainability, really useful and engaging event

Networking and knowledge sharing

Through the Julie's Bicycle events and other activities, responding organisations stressed the importance of the associated networking, information sharing and knowledge exchange they experienced.

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

Networking, sharing ideas, solutions and challenges

Networking; running a workshop and being on a panel. We could share our ideas and widen our profile

Partnership building and shared conversations

The 'real' examples of others which show the tangible benefits of action

Having access to practical advice from companies such as the Young Vic, giving advice on how to create sustainable shows

Resources and support

The extent of resources and support available in the form of practical advice and assistance was highly valued by the creative sector. The IG Tool, Creative Green certification and informative webinars were regularly singled out for praise, as was the bespoke nature of the support and knowledge of staff.

Practical advice

All the training has been high quality and practical

The ongoing discussions and alternative viewpoints raised in meetings. The IG tools are very useful for calculating energy impact

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

IG tools and certification very valuable

Website is invaluable for resources and help with action plan

Availability of JB members of staff for help and advice

The original template modelling an Environmental Policy which we have been able to alter to meet our own small company

Workshops on engaging staff in green programmes have been useful

Webinars

An element of the web resources that drew very positive comments from responding organisations was the series of webinars conducted by Julie's Bicycle.

A JB session for artists/cultural organisations as part of Low Carbon Oxford week. Also web resources are so very helpful - I wouldn't have known where to start without JB! I have communicated with JB via email when writing Environmental Policy - they were extremely helpful and knowledgeable. I have also taken part in an interesting webinar. I am on JB's mailing list which I find very insightful

Have used online webinars, but keen to develop this and do more

The webinars are very informative and a great way to exchange environmental information with multiple audiences - environmentally friendly and less time consuming

Specialist sector specific knowledge

The creative sector also chose to highlight the specialist sector specific knowledge offered by Julie's Bicycle. Staff familiarity and experience of the sector meant that they could direct organisations on the most appropriate way forward.

Specialist knowledge, support and global links

Knowledge and enthusiasm

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

Monitoring and audit

The opportunity to accurately self-monitor and audit organisational activities as a result of Julie's Bicycles tools and assistance was appreciated. It enabled for a clearer and more accurate understanding of organisational activities in relation to environmental sustainability.

Using the new application process for the Creative Green certification, helps us target low point scoring areas and focuses our actions

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

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

Monitoring our data and receiving feedback

JB audit was good, we need another one

Key cultural sector stakeholders explained how the work of Julie's Bicycle fits with their own organisation's strategic priorities. Positively, there was a close alignment.

The priorities overlap: environmental sustainability is their principal aim and it's one of our aims

It's important for us but for Julie's Bicycle it is core. Good training, advice, and tool options

Their and our environmental aims are the same

Furthermore, interviewees clarified where they believed Julie's Bicycle adds value to their organisation and the sector more widely.

There is still a lot to do but keeping environmental sustainability at the top of the awareness agenda is important, we all need to champion it. Many use their tool which is very helpful

Help, support, knowledge, advice, guidance, signposting

They specialise in environmental sustainability and it's very useful to be able to access and to be signposted to the right information. It helps us navigate the area. They have advice and expertise

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

It's really helpful having Julie's Bicycle as a partner

The Future of the Sector /

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6: Benefits of Sustainability

Benefits

Overall, more than four-in-five organisations (83%) have experienced some kind of benefit as a result of their environmental sustainability practices. While over half the responding organisations (54%) benefited financially, other benefits were also reported, including reputational, staff wellbeing and creative prospects.

TABLE 6.1: ORGANISATIONAL BENEFITS

	% (2017)	% (2014)
Financial benefits	54%	55%
Improved profile and reputation	43%	40%
Improved wellbeing	35%	Not asked
Creative opportunities	28%	Not asked
None	17%	Unreported
	Based on 308 responses	Based on 278 & 251 responses

Reported benefits were fairly consistent between 2014 and 2017. In 2014, organisations were asked about financial benefits (55%) and improved profile and reputation (40%) but not 'improved wellbeing' or 'creative opportunities'. The 2017 sample size is larger which means that in absolute terms, a higher number of organisations are reporting benefits than in 2014.

In 2017, many respondents took the opportunity to clarify these benefits.

In terms of **financial benefits**, respondents described saving money on energy and printing among other practical changes. They also highlighted an increase in remote working practices which also saved expenditure on travel.

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

Reduced electricity bills, however we are still recovering capital costs associated with the change

We anticipate a financial benefit from our solar panels

Some money (printing – cutting down cuts costs), same for energy efficiency

Organisations believed they had also experienced **reputational benefits** from the changes they were making. Staff, consumers and peers often appreciated the sustainable approach.

We have an Eco bond which had a very good response on social media.

People in our Festival have liked the fact we are asking everyone try and be environmentally aware.

The impact of "improved profile and reputation" is actually largely internal, amongst staff and our large pool of freelance creative workers who are generally 'green' leaning.

Produced films and creative product that reaches out into the wider public

Staff reported benefits directly and indirectly from greener organisational action. This ranged from the positive **health and wellbeing benefits** of say, cycling to work, or reduced travelling due to the push towards remote working and meetings. Importantly, beneficiaries were not just staff members with some organisations reporting their audiences and participants also gained from the changes.

Some of our staff regularly cycle into work and to meetings, we are trying to encourage more people to take sustainable transport

Reduced travelling does improve wellbeing. The digital workstyle encourages innovative thinking and shorter (virtual) meetings!

Employee satisfaction, loyalty and retention

Having an organisational Environmental Action Plan has positively impacted on our staff's own attitude in their personal life.

Pride of staff and volunteers.

Development of a new project where some of our participants are stroke survivors, many of which have not had the opportunity to be involved in environmental activities (i.e. gardening, growing techniques, permaculture) since before their illness

Organisations also reported **creative benefits** and these appear to be primarily driven by the networking and conversational elements of any changes.

Better relationships with University departments and local groups

Co-operation with other social enterprises

Strengthened collaborative networks

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

Improved service and dedication from supplier

For others, **environmental action was seen as a benefit in itself.**

We are a small festival in the mountains, and we are really close to nature, hardly any lighting, or fencing etc. We are really rooted in the natural environment already so going zero waste and 100% renewable is logical

It's about doing the right thing

Key cultural sector stakeholders summarised the benefits and impact of environmental sustainability on their organisation. One interviewee highlighted that it was important to consider the longer-term benefits of relatively expensive initial costs and another touched on the fact that it was important to recognise it was also a change in organisational mindset.

It can be financial if you get it right. There may be a slightly higher initial outlay but long-term impact may save you money. We're a national organisation and it's important to be seen being concerned with it and doing something. Political message and the trickle-down effect. If we are seen to incorporate these issues (for example, in set creation) it becomes common language for others – peer learning – if people are coming across it all the time. Also funding, it's important to be compliant with funding responsibilities too

The benefits are moral and financial and is funding conditional

Not only financial benefits but it's a mindset too. It saves you money and it's the right thing to do so why wouldn't you?

Financial benefits; £20,000 saving per year by making simple immediate changes

Better finances means a stronger company and a better, greener festival

The organisational benefits of sustainability were also examined by sub-sector as well as by activity type as the following two tables highlight.

Table 6.2 summarises respective subsectors and their reported benefits. Museums and Heritage see the most financial benefit, the most improved profile and reputation, and as well as Visual Arts, the greatest creative opportunities. Interestingly, the Theatre sector report the highest levels of improved wellbeing. Literature/spoken word and Dance reported quite low levels of benefit within the individual categories.

TABLE 6.2: BENEFIT TYPE, BY SUB-SECTOR

	Benefit	Financial benefits	Improved profile and reputation	Improved wellbeing	Creative opportunities
Combined Arts	80%	51%	46%	33%	33%
Dance	73%	53%	13%	33%	7%
Literature/spoken word	75%	50%	0%	25%	33%
Museums and Heritage	94%	70%	53%	29%	35%
Music	75%	39%	36%	25%	19%
Theatre	87%	67%	46%	45%	26%
Visual Arts	84%	55%	45%	39%	35%

Based on 228 responses

Table 6.3 summarises respective activities and reported benefits.

As an activity, producing / publishing / releasing artistic or cultural work, produces the most financial benefits and improved profile and reputation. Funding, representing or developing the sector report the highest levels of improved wellbeing and creative opportunities. No activity appears to be lagging significantly across the benefit categories. As with the benefits by sub-sectors above, some of the margins of benefit between activities are slight.

TABLE 6.3: BENEFIT TYPE, BY ORGANISATIONAL ACTIVITY

	Benefit	Financial benefits	Improved profile and reputation	Improved wellbeing	Creative opportunities
Producing / publishing / releasing artistic or cultural work	89%	73%	48%	35%	23%

Operating a building / venue	84%	60%	38%	41%	32%
Promoting / producing festivals / events	81%	47%	44%	32%	33%
Touring	80%	56%	33%	42%	31%
Funding, representing or developing the sector	81%	49%	47%	49%	35%
Other	88%	51%	43%	36%	31%

Based on 292 responses

The Future of the Sector /

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7: Moving Forward: Collective Action and Vision

Increasing Importance

In recent years, environmental sustainability has grown in importance as highlighted by a key cultural sector stakeholder.

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

Organisations were asked to consider the importance of environmental sustainability in their organisation over the last three years and their expectations for the next three years. In responses, most believed that green considerations have climbed the strategic agenda. Based on survey responses, this trend looks set to continue; almost no organisations believe it will become less important.

TABLE 7.1: IMPORTANCE OF ENVIRONMENTAL SUSTAINABILITY IN ORGANISATION

Last 3 years	2017	2014	2014	2017	Next 3 years
It has become more important	52%	72%	66%	60%	It will become more important
It has stayed the same	47%	25%	26%	39%	It will stay the same
It has become less important	1%	2%	0%	1%	It will become less important

Based on 332 responses

In 2014, 66% of responding organisations expected environmental sustainability to become more important over the next two years and in 2017, 52% reported that it had become more important to them over the previous three years. Expectations and retrospective reporting might suggest that organisations are slightly over-estimating the speed of the change.

Until 2018, Arts Council England is investing: £333m in 663 National Portfolio arts organisations; £70m of Lottery funding in Grants for the Arts, an open-access funding programme; £7.5m in museums; and £34.7m in their strategic funding programme, targeting particular opportunities or funding gaps to create arts and culture experiences for everyone, everywhere.

As such, the impact of ACE funding across the creative industries in England should not be underestimated, nor should the respective funding from their counterparts in Scotland, Wales and Northern Ireland. As leaders in the sector, the requirements attached to vast amounts of sector funding can produce seismic attitudinal shifts relating to a given theme or activity. This appears to be the case with environmental considerations.

While much good work will have been done by organisations already; for many creative organisations, environmental sustainability will have increased in importance as a direct result of the importance attached to it by funders. As such, sector funders arguably have the acutest sector influence in relation to environmental sustainability.

Priorities

The importance of environmental sustainability to creative organisations is clear but in order to improve and strengthen, there is a wide range of priorities that creative organisations are focussing on.

All were identified as a 'priority' so activities are ranked in order of what organisations selected as a 'high priority' to highlight what they might be more actively pursuing. **Developing the consumer base, developing new sources of income, and developing creative work or programmes** emerged as the core priorities of the sector.

TABLE 7.2: FUTURE PRIORITIES

	High Priority	Some Priority	% Priority
Developing audiences / visitors / consumers	87% (80%)	10%	= 97%
Developing new sources of income	84% (79%)	14%	= 98%
Developing creative work or programmes	77% (65%)	19%	= 96%
Improving diversity	71% (n/a)	26%	= 97%
Strengthening social inclusion and community engagement	69% (n/a)	27%	= 96%
Improving access	59% (65%)	36%	= 95%
Engaging with new technologies and digital media	56% (51%)	40%	= 96%
Better advocacy and positioning	48% (49%)	48%	= 96%
Improving staff capacity or skills	47% (42%)	50%	= 97%
Improving environmental sustainability	45% (38%)	50%	= 95%
Developing branding / marketing	38% (41%)	58%	= 96%

Based on 330 responses

While nearly half (45%) of responding organisations reported that **improving environmental sustainability** was a high priority, as expected, the creative sector's core priorities still rank above environmental sustainability in relative importance.

There appears to be a core of organisations that emphasise environmental sustainability is a must, forming a fundamental element of their strategic thinking. The remaining organisations will give serious consideration to environmental sustainability but often within the confines of their creative vision, financial survival and conditions of funding.

Ensuring our environmental concerns take into account the particular access requirements of all of our disabled stakeholders

I have given less priority to those things that are already core to our organisation. We continue to focus on developing these things. The High priorities represent new focusses

In January '17 we won 1st Stage Sustainability Award for the new theatre

Realistically we prioritise business survival and improvement over environmental/social concerns but we have a manifesto which includes the latter as priorities

Where priorities are indicated as some priority it is in most instances because the work we are doing in these areas is already fairly advanced

Key cultural sector stakeholders expanded on their organisational priorities in discussions.

Environmental sustainability vs the artistic direction or vision. Sometimes but not always in conflict. We negotiate these issues at length. Easier for venue managers that are working in their own theatre all the time. There is an artistic vision that people want to realise and protect in their work. We just need to ensure as much as possible it is in line with our environmental principles and statement of intent

The building is big and built in the 1970s, being open and accessible is a core part of our strategy and with that comes the usual challenges; open door policy so heat loss, well lit - lighting all the public areas, Wi-Fi etc. It's a big building to heat. We looked at replacing all the single glazing and we were quoted approximately £2m

We are a huge building with 1000 employees and lots of activities. That's comes with the usual challenges

Energy consumption, business travel, waste management. Also, transport links are improving but currently difficult to get to us by public transport so the vast majority of visitors come by car. Rail just isn't convenient. With the new regional mayor, public transport is high on the agenda.

Have to look after the physical buildings and how we run them, what's inside the buildings and footfall

Primarily the events and the people. We have post-event salvage, shuttlebuses to encourage public transport and discourage car use, or at least car sharing. Concerns with water and sewage (long drop toilets to minimise chemical use). We have contractual supply chain targets. We work all over the world and we are far ahead of statutory expectations

Drivers for Change

Responding organisations were asked what they believed the drivers of environmental sustainability within their organisation would be in the near future.

There was a balance to be considered by the creative sector; between their future priorities listed above and the various, often external influences and future drivers detailed below.

All drivers were considered by the sector to be important. To better identify the core drivers, ranking is ordered in terms of what organisations selected as a 'major driver'. **Commitment of staff or senior management, finances and compliance** emerged as the primary drivers.

TABLE 7.3: FUTURE DRIVERS

	Major Driver	Minor Driver	% Driver
The commitment of staff or senior management	75% (63%)	22%	= 97%
Reduced costs	57% (54%)	33%	= 90%
Compliance with regulations or funders	52% (47%)	40%	= 92%
Mission or creative vision	51% (35%)	42%	= 93%
Creative and artistic opportunities (creative partnerships; specific funding calls etc.)	48% (n/a)	40%	= 88%
Partnership opportunities	45% (n/a)	46%	= 91%
Audience / visitor / consumer demand	41% (20%)	48%	= 89%
Artists	38% (n/a)	45%	= 83%

The commitment of trustees or parent body	35% (24%)	47%	= 82%
Opportunities for positive branding	35% (42%)	56%	= 91%
Avoiding risks (e.g. increased insurance costs, stranded assets)	29% (21%)	50%	= 79%
Avoiding potential reputational risks (e.g. fossil fuel sponsorship)	29% (n/a)	52%	= 81%
Investment opportunities	28% (n/a)	41%	= 69%
Peer pressure from within creative community	18% (n/a)	57%	= 75%

Based on 330 responses

Responding organisations explained that there was a range of important personal and organisational drivers.

A key driver (though it's not enforced) we believe, needs to be to redress carbon emissions. We want to lead the way for arts and cultural organisations who work with airports [one of our funding sources] to do our bit

Environmental sustainability is my raison d'être and primary driver in my practice and as associate artist

It's just the right thing to do!

Views of the incoming influential Chair

We don't have to, but we really want to be a model festival and go 100% zero waste and 100% renewable power... it's just so important. Everyone at home recycles... so why not at a festival? Times of hedonism and enjoyment are no different and people need to temper this with continued environmental efforts

We would be very interested in environmental improvement - all staff/ volunteers have this ethos but in our building our hands are tied

Key cultural sector stakeholders similarly expanded on their personal and organisational drivers in interview.

While environmental sustainability featured highly, there was sometimes a conflict between environmental sustainability and the creative vision of programmes and performances, and in other cases green efforts did not return the expected benefits. Overall, however, drivers were positively reported and environmental sustainability considerations still vigorously pursued.

It's important for us to ensure that we have interrogated the requirements and it's about challenging the perceptions of why and how things are done, both artistically and practically; can we use hydro options instead of oil generators? Sometimes not, if we have to source the heater from a different part of the country and put it on a truck, but at least we explored the options. It's a priority for us to have these issues in contracts with directors/production staff; it's a sustainability principle. Our head of production/production manager is keen on environmental sustainability and it features early on in our conversations. There might be a conflict between environmental sustainability and the artistic direction/vision but it's about ensuring that we have these critical conversations

There's a moral obligation but also practical considerations such as financial benefits and funding conditions. We have dual ambitions of responsibility and financial health. Our [environmental sustainability] gains aren't as great as I'd hoped because we have expanded at the same time - higher footfall etc

There is a range - moral obligation, financial reasons - it's an investment that has reward (more from reducing costs than from a funding perspective). It's actually common sense

Attracting visitors is relentless for us. Annually we attract 300k but we want 500k and we've realised that attracting more visitors and environmental sustainability aren't polar opposites.

There is a moral responsibility of being good citizens. We're a big industrial open air site and ironically we're historically representing the place where fossil fuels started (i.e. the start of the industrial fossil fuel age). Finances will always necessarily be a driver of what we do. Arts Council England conditions also a driver

Moral and financial

Table 7.4 extends the future drivers listed in Table 7.3 and shows them analysed by the level of subsidy reported by responding organisations.

In many cases, major future drivers reported by organisations are not determined by subsidy level alone. However, there is a higher level of staff or senior management commitment from funded organisations than those receiving no funding. Funded organisations are also slightly more concerned about compliance with regulations or funders. Conversely, audience / visitor / consumer demand along with positive branding and investment opportunities are rated by commercial/non-subsidised organisations as more of a major driver than funded organisations.

It is becoming clear that while funding conditions are certainly a driver of organisational engagement with environmental sustainability, so too is the personal commitment of staff or senior management. Personal commitment is a strong indicator of engagement with environmental sustainability.

TABLE 7.4: FUTURE DRIVERS, BY SUBSIDY LEVEL

	Major Driver (All)	Public sector grants or funding income		
		None	< 50%	> 50%
The commitment of staff or senior management	75%	67%	77%	77%
Reduced costs	57%	55%	62%	51%
Compliance with regulations or funders	52%	44%	53%	52%
Mission or creative vision	51%	58%	51%	48%
Creative and artistic opportunities (creative partnerships; specific funding calls etc.)	48%	40%	47%	54%
Partnership opportunities	45%	51%	38%	53%
Audience / visitor / consumer demand	41%	60%	37%	35%
Artists	38%	39%	37%	38%
The commitment of trustees or parent body	35%	32%	34%	38%
Opportunities for positive branding	35%	52%	30%	34%
Avoiding risks (e.g. increased insurance costs, stranded assets)	29%	34%	27%	29%
Avoiding potential reputational risks (e.g. fossil fuel sponsorship)	29%	26%	26%	35%
Investment opportunities	28%	37%	29%	23%
Peer pressure from within creative community	18%	17%	16%	19%

Based on 330 responses

Future resources

The cultural sector is still keen to dedicate additional time and money to environmental sustainability in a number of areas over the next few years. The full range is stratified below but it was reported that resources will chiefly be directed towards **day-to-day operations and efficiencies**, **waste management**, **measuring and monitoring of impacts**, **organisational strategy** and **staff training**.

TABLE 7.5: FUTURE DEDICATION*

	%
Day-to-day operations and efficiencies	75%
Waste management	50%
Measuring and monitoring of impacts	48%
Organisational strategy	45%
Staff training	40%
Programming / creating work	38%
Audience engagement	35%
Capital development	34%
Sustainable production	31%
New partnerships	29%
Supply chain engagement	27%
Renewable energy tariff or provider	23%
Renewable energy generation	21%
Activism and communications	19%
Ethical sponsorship	18%
Biodiversity and nature conservation	13%
Divestment or investment strategy	9%
Other	6%

Based on 314 responses

*not asked in 2014

With so many planned or potential actions, the responding organisations are looking forward optimistically.

All proposals or plans are developed in consultation with the University Estates Department

Doesn't mean we won't do the others, but these are areas we will do more

Greening our festival where possible

It is integral to my working practice and to us

Yes to all, but we need to know what our priorities are. Doing capital now...

Challenges

Responding organisations were invited to identify any areas or issues which were challenging. A number of main obstacles were identified and most were considered more challenging relative to 2014. Most notably, creative organisations are hampered by **capacity issues**; organisations reported a lack of capacity at their disposal to develop their activities as fully as they would like. This is followed by the combined challenges of **maintaining staff commitment** and **embedding environmental actions into day to day operations**, as well as a variety of other challenges.

TABLE 7.6: CHALLENGES

	%
Capacity	84% (50%)
Staff commitment	78% (*)
Embedding environmental actions into day to day operations	74% (37%)
Accessing external funding	70% (36%)
Level of interest among consumer base	69% (30%)
Senior management commitment	67% (*)
Level of interest among artists/creative partners	67% (n/a)
Developing a business case for environmental sustainability investment/budget allocation	67% (26%)
Trustees or parent body commitment	65% (19%)
Existing regulations and standards	64% (23%)
Effectively communicating environmental work	63% (29%)
Skills or knowledge	61% (35%)
Availability of/access to green services/suppliers	58% (n/a)
Finding the right partners	58% (n/a)

Based on 300 responses

*in 2014, staff commitment and senior management commitment were one answer category = 26%

Bespoke challenges were emphasised by one key cultural sector stakeholder.

Unlike many theatres we're not building based; we are a touring theatre. Our challenge is starting from scratch each time, and we find it difficult to benchmark our environmental impact because venues and productions are not like for like, one production could be in a wood, the next could be on Snowdon, the next in a community centre. We set standards though. We take the usual environmental concerns/precautions with our office but the biggest challenges are our productions

Responding organisations explored the challenges they face in attempting to strengthen or develop their environmental sustainability actions. These covered: time constraints; a lack of control over potential changes; a lack of appropriate green supply chains; and the specialist knowledge needed in the area.

The motivation and level of interest from the building we are based in

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

Knowledge - since things change so fast; to be up to the minute is a challenge

One of the main issues is time. Time required to innovate is scarce and ever getting scarcer with funding reducing overall and competition to stay afloat increasing

The remarks of key cultural sector stakeholders echoed these challenges and barriers. They also discussed the enablers of environmental sustainability for their organisation.

Artistic vision vs environmental principles of course, but also benchmarking. No two tours/productions are the same so it's hard to compare, they're incomparable – we can't say, we used 10% less energy on this most recent production; it can't/won't work like that. Many of the freelance/newer directors are receptive, but long term, established directors might be more entrenched in their view and resistant but that's changing with these conversations at early inception. There is a sea change happening though. There's a big shift and JB are a part of that.

Senior Management level capacity (in post since 2014 and I've had a lot to do – as you can imagine) and the complexity of the issues. We recognised that external support was needed via JB's expertise.

The cost. We don't always have the money to invest in this (CCHP plant). We will pay back the borrowing and it will pay us back but it has significantly reduced our reserves in the short term so we look less healthy than we are. The other big challenge is the behaviour change aspect. We need to change the behaviour of 1000 employees. The cost was the first stage and the behaviour change is the next phase. We have to set an example.

As above, the car. Also staff awareness – 220 staff here and education about their operations and its impact. Since we're telling the industrial story, ES will be a challenge and an irony of our museum.

Multiple locations throws up interesting challenges. Also, Many buildings are historic so may be limited as to what you can change – i.e. may be allowed to change like for like sash windows from single to double glazing, but they might not be the best/most environmental windows and they cost more?, certainly another level of administration to pass.

Most significant challenge is the logistics of festivals.

Support

The sector was further invited to identify where specialist support would be beneficial.

As challenges are felt more keenly in 2017 than in 2014, reported support requirements.

While we might expect a clear relationship between identified challenges and subsequent support, this does not necessarily hold. For example, capacity is the primary challenge facing responding creative organisations but it is not an area for which people expect or would seek specialist support. Expertise and specialist support was more urgently needed in **finding the right partners, skills or knowledge, accessing external funding, and the availability of and access to green services and suppliers.**

TABLE 7.7: SUPPORT

	%
Finding the right partners	70% (n/a)
Skills or knowledge	64% (33%)
Accessing external funding	64% (39%)
Availability of/access to green services/suppliers	61% (n/a)

Developing a business case for environmental sustainability investment/budget allocation	56% (24%)
Effectively communicating environmental work	53% (26%)
Existing regulations and standards	53% (19%)
Trustees or parent body commitment	46% (15%)
Embedding environmental actions into day to day operations	46% (29%)
Senior management commitment	44% (*)
Level of interest among consumer base	44% (19%)
Level of interest among artists/creative partners	42% (n/a)
Staff commitment	38% (*)
Capacity	30% (15%)

Based on 300 responses

*in 2014, staff commitment and senior management commitment were one answer category = 17%

Support was viewed as important, sometimes essential in allowing responding organisations to realise their organisational and environmental goals.

All areas of support

Support from landlords

Julie's Bicycle to date has provided a good framework (via the Creative Green report recommendations) for identifying priorities. Advice and support via regular contact with the Julie's Bicycle team and the conferences/ workshops are also valued

Funding that will help the company continue to do what it does best. Same with partners

Leadership on these issues lies with our host and partner organisations; we support

We need to keep refreshing skills, commitment in staff body but the area we could use specialist support is in ensuring that our new building is operating as effectively as it could and reviewing our energy use to continue to drive it down; also potential for further infrastructure improvements

Key cultural sector stakeholders also see ongoing and future support as vital for success.

There is actually quite a lot of support out there (Welsh Gov) and signposting but the biggest thing is the culture shift – understanding and application. There needs to be a continual push for, and training about it. Support for capital investments would be good, signposting to the possibilities and the chances to share. More communications on where things can be sourced – going beyond the Arts communications and look at commercial business and the third sector – more crossover. There are other routes to environmental sustainability

We were very pleased to get the level of support we did. Good advice etc. Lots of previous endeavours but now more structured elements. Longer term relationships with smaller suppliers – we've done this and the economic reality wasn't as stark as it first appears

I was disappointed to find out about the lack of support for capital projects and disappointed that we had to go to the commercial markets to borrow. There isn't a complete lack of schemes/subsidies but they are not cheaper. There was a government scheme but it cost more? I'd like to see more signposting and for this

Julie's Bicycle great but more, clearer info available across the sector

There is so much challenging and conflicting information out there. For example, voltage optimisation some say it's worth it and some say it's not. I'm not an electrical engineer and neither are any of my green team. Need clear and helpful guidance about ideas, methods, schemes, initiatives and so on. Share good practice and neutral advice. It would be good if ACE could provide guidance if ES is a condition of funding for RFOs. We use local authority support wherever we find it. Might be capital expenditure subsidy for a building refurbishment for example i.e. Newcastle City Council capital spend through the 'good stewardship'. Need more of all of that. Also, waterless urinals might be great but then you get into the areas of which chemicals you're using; are they the right chemicals? We've changed to LED lights. By digging into these things we noticed we were using a lot of water overnight when there was no one in the building. Turns out the urinals were flushing every 15 minutes. We rectified that by using timers so that's an instant, free benefit and saving

Government pays lip service but local authorities are on their knees so I don't expect any great change in Government directives, targets or subsidies any time soon

Future Actions

Responding organisations explained in great detail the kind of future environmental actions they would be pursuing. Very positively, there was an extensive range of responses with nearly two-thirds of organisations elaborating on the specifics of likely activities.

Proposed future actions reiterated actions already taken by organisations in the last few years. The future actions highlighted by responding organisations are a continuation or extension of the innovative and effective actions detailed previously.

The high level of engagement shows a serious consideration of necessary forward-looking changes, actions and improvements within the sector and a willingness across the creative sector to deliver those changes.

The direction of future progress included continuing and extending:

- **Small and large scale practical changes in day to day operations** (relating to greening buildings and/or offices, touring, remote working, travel, supply chains, processes, green teams etc.);
- **Adapting and implementing organisational strategies and action plans;**
- **Educating and engaging staff;**
- **Performative sustainability and green thematic works;**
- **Advocacy; and**
- **Local, regional, and national partnerships.**

Comments such as 'we'll keep at it', 'we'll keep it at the forefront', 'keep talking, finding new ways to have the conversation', 'continue to develop core operations', 'continue to follow Action Plan and work with others', 'continuing to do more of the above, creating a growing group of campaigners' were frequent.

Among key cultural sector stakeholders, the messages and suggestions for the future.

Arts are strongly focused on the education agenda at the moment and it would be good if the environmental agenda was an equal focus

That the creative sector engages more – buying green etc. and it's about making space for those conversations. We used the model of our diversity 12 months ago and applied it to environmental sustainability: What are our beliefs; where are we now; where do we want to get to in the future; and how do we get there? We applied the same model to our current environmental sustainability thinking. We're optimistic as a community and environmental sustainability should be part of everyone's thinking, in turn will hopefully lead to significant progress

Similar challenges going forward so the same focus on capital investment and behaviour change

In 2017, the clear message coming from the creative sector about future action and direction is - **more of the same**.

Collective Actions

Responding organisations were asked to summarise which collective actions they would most like to see and which could accelerate engagement with climate change across the cultural and creative sector.

From within a variety of potential collective options, the sector principally supports the idea of the **development of a shared vision or action plan for the sector; developing a community of peers that provide opportunities to share practice and network; continuing to work with funders to introduce new investment and incentives; and developing collective procurement options for greener products and services.**

The levels of sector support for collective actions are detailed below.

TABLE 7.8: COLLECTIVE ACTIONS FROM THE CULTURAL SECTOR

	%
Developing a shared vision or action plan for the sector	53%
Developing a community of peers that provide opportunities to share practice and network	43%
Working with funders to introduce new investment and incentives	39%
Developing collective procurement options for greener products and services	37%
Co-programming and co-creating work on environmental themes with others	33%
Joint awareness-raising to the general public	32%
Working with policymakers or local government to create new opportunities for collaboration on sustainability	29%
Shared training or support to enable better advocacy and communication	27%
Information sharing networks on the broader context (such as scientific and political developments, trends, statistics)	26%
Working with research institutions to create new opportunities for collaboration on sustainability	22%
Working with businesses to create bespoke technologies and services	22%
Joint campaigning to politicians	17%
Other	5%

Based on 319 responses

Many of the proposed collective options could be pursued in union and remarks from responding organisations emphasised the need for shared actions and co-operation wherever feasible.

Creating a compelling shared collective vision

Critically there needs to be a way to adopt these changes without significant resource implications otherwise the sector that is already struggling financially will not be able to make significant progress in this agenda

Development of policy that did not discriminate against the rurally isolated

Joint training/ process for cultural practitioners to go on a deep personal inner journey of change and transformation for a life sustaining world. Policy and procedures not enough we need to be bold enough to look deeply within at ourselves, our own stories, our own disconnection with the natural world, its needs to be a head and heart journey we've got to get personal!

Providing digital networks to easily obtain and share peer learning on reducing waste and carbon in arts organisations

Being able to continue to and increase my work supporting other artists and arts practitioners, community workers, arts managers, through training and mentoring. This supports personal transformation and cultural shift to enable us to re-viewing ourselves within an ecological framework which naturally catalyses and motivates sustainable practice

The Sustaining Creativity Survey 2017 shows that that the will and the support exist within the sector, and the proposed collective actions offer fertile ground for the next few years.

The Future of the Sector /

The appendix contains all the personal vision quotes for an environmentally sustainable creative sector. Might be nice in your redesign to select some good quotes and use them in between each chapter/section.

8: Conclusion

This Section draws conclusions from the research and includes recommendations to improve and develop future environmental sustainability in the sector.

Conclusion

Findings from the Sustaining Creativity 2017 Survey were positive and relatively consistent with 2014 findings.

The sector continues to seriously consider its environmental sustainability. Since the 2014 Survey there has been a slight increase in its reported importance and a similar slight increase in reported actions.

Environmental sustainability has become increasingly important to organisations in recent years and this trend looks set to continue. As such, it appears that reported environmental actions are catching up with attitudes and expectations.

Environmental sustainability across the cultural sector was chiefly driven by senior staff and a strong concern about climate change and clean energy. High numbers reported considering environmental sustainability when making strategic and creative decisions.

Main Findings

The Sector:

92%	consider environmental sustainability to be relevant to their organisational vision and mission
83%	report organisational benefits from their environmental actions
77%	from senior respondents; those reporting as Director or Senior Management level
84%	have an up-to-date environmental policy
36%	of organisational environmental policies or action plans refer to specific emissions reductions or other targets that are based on international, national, or local policies.
48%	have a Green Team or Green Champion
38%	are on a green energy tariff or are buying energy from a 100% renewable energy supplier
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

Actions

In 2017, compared to 2014, responding organisations are more likely to be engaged in and planning for, environmental sustainability practices, more of the time. These figures more than any others, show the level of change and the progress made in the last 3 years.

Comparatively, organisations reported doing at least as much as their creative peers; other artforms and others within their own artform, so when it comes to environmental sustainability, organisations do not feel that they are lagging behind.

The sector has also engaged a range of innovative and effective actions with regard to environmental sustainability, including progress in: practical changes in day to day operations; capital investments; strengthening organisational strategies and action plans; engaging staff; creative works and programmes with environmental sustainability as a main theme; and local, regional, and national partnerships.

Those areas that the sector found challenging included: behavioural change in staff and/or consumers; limited ability to adapt their location and operating environments/processes; organisational capacity; engagement and communication with other organisations or consumers was at times challenging; fashionable, ad hoc and short term initiatives that were ill-devised or ill-prepared; access to and availability of quality green supply chains; financial viability; and a lack of specialist environmental knowledge. Exploring the activities that the sector found challenging is an important learning opportunity for all organisations across the creative sector.

Drivers for change

There was a range of important personal and organisational environmental sustainability drivers within the sector.

Primary drivers of environmental sustainability in the near future:

-
- The commitment of staff or senior management
-
- Reduced costs
-
- Compliance with regulations or funders
-

While environmental sustainability featured highly, there was occasionally conflict between environmental sustainability and the creative vision of programmes and performances that needed to be addressed or reimagined. In some cases, green efforts did not return the expected organisational benefits but overall, drivers were positively reported and environmental sustainability considerations vigorously pursued.

Priorities

The importance of environmental sustainability to creative organisations was a strong feature of the Sustaining Creativity Survey 2017. However, it ranked lower relative to competing core sector priorities. In order to improve and strengthen, there is a wide range of priorities that creative organisations are focussing on.

Primary priorities for future improvement:

-
- Developing audiences / visitors / consumers
-
- Developing new sources of income
-
- Developing creative work or programmes
-

Resources

The cultural sector is keen to dedicate additional time and money to environmental sustainability in a number of areas over the next few years.

Primary areas for additional time or money to environmental sustainability over the next three years:

-
- Day-to-day operations and efficiencies
-
- Waste management
-
- Measuring and monitoring of impacts
-

With so many planned and potential actions, the responding organisations are looking forward optimistically.

Benefits of Sustainability

Creative organisations reported on the range and scale of benefits experienced by the sector as a result of their environmental actions. More than four-in-five organisations (83%) experienced some kind of benefit as a result of their environmental sustainability practices. Specifically, the sector reported financial benefits; reputational benefits; health and wellbeing benefits; and creative benefits.

Financially, the sector described saving money on energy and printing among other practical changes. They also highlighted an increase in remote working practices which saved expenditure on travel. They also experienced reputational benefits from the changes they were making. Staff, consumers and peers often appreciated the sustainable approach. Staff reported benefits directly and indirectly from greener organisational action, ranging from the positive health and wellbeing benefits of for example, cycling to work, or reduced travelling due to the push towards remote working and meetings. Importantly, beneficiaries were not just staff members with some organisations reporting their consumers also gained from the changes. Organisations also reported creative benefits and these appear to be primarily driven by the networking and conversational elements of any changes.

Another expected benefit was the potential for change in organisational mindset as a result of environmental actions.

Challenges

A number of main obstacles have been identified. The sector explored the challenges it faces in attempting to strengthen or develop environmental sustainability actions.

Most notably, creative organisations are hampered by capacity issues; organisations reported a lack of capacity at their disposal to develop their activities as fully as they would like. This is followed by the combined challenges of maintaining staff commitment and embedding environmental actions into day to day operations, as well as a variety of other challenges.

Top 3 challenges:

-
- Capacity
-
- Staff commitment
-
- Embedding environmental actions into day to day operations
-

The sector further explored: a lack of control over potential changes; a lack of appropriate green supply chains; and the specialist knowledge needed in the area.

Support

The sector identified the areas in which specialist support would be beneficial.

Creative organisations are seeking expertise and specialist support to identify the right partners for their strategic and creative activities. Additionally, many admit to lacking the specialist skills or knowledge in relation to environmental sustainability and would like help to identify sources of creative and green funding. Also mentioned was the availability of and access to quality green services and suppliers.

Top 3 support requirements:

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

Support was viewed as important, sometimes essential in allowing responding organisations to realise their organisational and environmental goals.

The creative sector deems ongoing and future support as vital for success.

Collaboration

The creative sector is a collaborative one and organisations highlighted that these co-operative relationships extended to environmental sustainability as well as their artistic partnerships.

High levels of collaboration were reported in the last few years and three-quarters of organisations reported collaborative practices with: other arts organisations; artists; environmental consultants; local authority or policymakers; green charities or campaigning organisations; local community groups; research institutions or higher education; and schools. Other collaborations involved: environmentally themed creative works; independent utility bill auditors; recycling companies; ethical permaculture ventures; architects; public transport companies; and various regional or thematic green programmes, initiatives and networks. Furthermore, the sector is pursuing future plans to create or extend collaborations, partnerships or networks.

The Role of Julie's Bicycle

In the majority of cases, the collaborations reported by the sector included Julie's Bicycle.

Julie's Bicycle is often the chief environmental partner for many creative organisations and have utilised its resources and attended its events. The assistance provided by Julie's Bicycle was positively regarded and the sector articulated what had been most valuable from Julie's Bicycle's comprehensive suite of support. This included: strategic priorities and agenda setting for the sector; the events regularly hosted or facilitated by Julie's Bicycle; the associated networking and knowledge sharing; the wide-ranging resources and available support in the form of practical advice and assistance, particularly the IG Tool, Creative Green certification and informative webinars; the specialist sector specific knowledge; and the opportunity to accurately self-monitor and audit organisational activities as a result

Future Actions

The sector will be engaging in a variety of future environmental actions over the next few years. Likely future activities echoed those already taken by organisations in the last few years and as such, will be a continuation or intensification of the innovative and effective actions detailed previously.

This included continuing and extending: small and large scale practical changes in day to day operations; capital investments; adapting and implementing organisational strategies and action plans; educating and engaging staff; performative sustainability and green thematic works; advocacy; and local, regional, and national partnerships.

Collective Actions

The Sustaining Creativity 2017 Survey confidently suggests that collective actions will have a positive impact on the cultural sector and accelerate engagement with climate change.

The sector principally supports the idea of the development of a shared vision or action plan for the sector; developing a community of peers that provide opportunities to share practice and network; continuing to

work with funders to introduce new investment and incentives; and developing collective procurement options for greener products and services.

Primary collective actions sought by the sector:

-
- Developing a shared vision or action plan for the sector
-
- Developing a community of peers that provide opportunities to share practice and network
-
- Working with funders to introduce new investment and incentives
-

The sector also touched on the importance of developing collective procurement options for greener products and services.

It is important to consider that proposed collective options need not be pursued in isolation; the sector desires shared action and co-operation wherever possible.

Summary

In 2017, as in 2014, subsidised organisations are still leading the way in terms of developing and maintaining environmental practices, reinforcing the idea that environmental conditions of funding are a strong driver of change. While funding conditions are certainly a driver of organisational engagement with environmental sustainability, so too is the personal commitment of staff or senior management. Personal commitment is a strong indicator of engagement with environmental sustainability. It would be fair to conclude that the two conditions in tandem; funding conditions and staff commitment, provide the most fertile ground for engagement with environmental sustainability practices. This also means that the most profound environmental activity is inherently vulnerable. If key individuals are the ones pushing the boundaries of often funding conditional environmental activity, and then leave the organisation before activities are fully integrated into overall strategies, priorities, policies, and job descriptions, there is a higher chance that activity will contract.

Environmental sustainability in combination with the future of the sector appears healthy. In 2017, the clear message coming from the creative sector about future action and direction is - **more of the same**.

This is most starkly evidenced through the personal words of strategic level respondents; those in tactical, leadership and governance positions who expressed their personal idea or vision for an environmentally sustainable creative and cultural sector. Remarks by sector leaders show a genuine interest in, and engagement with, environmental considerations. Engagement is further clear from the scale and detail of provided responses. The levels of engagement with the 'Sustaining Creativity' programme and the 2017 Survey shows a serious consideration of necessary and forward-looking actions and improvements within the sector, and willingness to deliver those changes where possible.

For many creative organisations, the importance of environmental sustainability will have increased as a direct result of the importance attached to it by funders. With those conditions can come seismic attitudinal shifts and it is a potential game-changer for environmental sustainability in the creative sector.

Those best placed to forge new ground might be the larger, better funded organisations that have the resources and capacity to work in close partnership with organisations like Julie's Bicycle to be innovative and pioneering. There is the potential to adapt practices for differently sized organisations resulting in positive and practical trickle-down lessons for the smaller organisations whose capacity and resources might be more limited. It is also important to consider that the reverse may also be true; very small creative organisations who are often more agile and quicker to adapt could quickly prove which actions are effective and which are ineffective. A tailored framework of support continues to be vital.

Despite some challenges, there remains considerable optimism within the creative sector and with some extra support, co-operation and coherence, environmental sustainability within the creative sector will continue to enjoy fertile ground.

Appendix

This appendix contains all personal visions for an environmentally sustainable creative sector.

The Future of the Sector

Approximately one-third of responding organisations expressed their personal idea or vision for an environmentally sustainable creative and cultural sector. In their own words:

A carbon neutral sector

A common quality mark

A creative and cultural sector that use art to inspire positive change

A genuinely low carbon culture where likely carbon emissions and impacts are factored into every decision

A low carbon industry that advocates through creative practice and leadership for a national low carbon economy and commitment to reducing negative environmental impacts

A sector that implements policies which have impact but are also realistic given resources

A sector that is able to think in the long term, beyond the next project or programme, and which is able to express a positive vision of sustainability

A sector that is caring for the environment and humanity

A sector that sees itself as inextricably implicated in either driving climate change and environmental injustice or working against them. Obviously, the vision is that the cultural sector would ally itself to working against them, but recognition of being enmeshed is a precursor

A sector that understands and acts to be sustainable and proactive. It is part of who we are, what we do and how we do it

A sector that willingly embraces the short-term costs of change recognising that this is the most existential issue we face in the world and which imaginatively calls on others to join us in changing the way we live in the world

A sector that works collaboratively to highlight the issues we face (through public art and discussion), whilst simultaneously providing creative solutions to some of the challenges to an environmentally sustainable future

A sector that works in harmony and creatively to make a difference

A top strategic priority for all cultural organisations

A world-leading sector, both demonstrating the possibility and the benefits of sustainable business practice and engaging with audiences about how and why we do what we do for sustainability

Access to free professional advice and funding for implementation

Affordable 'green' creative supplies than are the same price as the bad ones

All festivals use only solar. All festivals have a zero waste policy. All festivals subsidise coach travel. All festivals use reusable plates and cutlery

An arts sector that engages with the issues that need addressing

An industry that has a positive environmental impact and is core to its place in society

Artists are the imaginers of better futures, engaging audiences creatively in that imaginative process

As a minimum the cultural sector should have a neutral impact on the environment. The opportunity is to lead the way in sustainability and using their creative skills to engender this with the wider public

As effective conveyors of ideas to large audiences, I think there is great potential for the cultural sector to establish the importance of environmental sustainability. Hopefully, our engagement will inspire other sectors to work with dedication in this area as well

Better touring networks

Building a community around arts and culture through inroads that have the most relevance and importance to them such as making their community a healthier and greener place

Climate change

Climate change addressed creatively through programming across the sector

Collaborating more on recycling of materials

Collaboration and commitment

Collective investment in low-carbon technology, especially energy

Digitally presented work; Dedicated environmentally efficient arts venues for live work; Shared office resources/spaces with collaborate and private space

Each to play their part relative to the scale of organisation

Embed use of energy and reduction of power in shows

Embracing paperless ways of working, digital media art delivery over more traditional materials and low-load tools (LED, heat recovery, insulation) assuring that delivery of services are optimised for the least possible consumption

Enlightened self-interest - the practical realisation that we each are impacted when the environment is damaged, and each positive contribution is powerful

Ethical and diverse creating equity and space for innovation

Every organisation has an environmental ambassador. Also support for organisations renting very inefficient buildings that don't have much say in what should happen

Finding a creative way of disposing waste

For everybody to make a small personal difference we can celebrate collectively

For theatre to use its position in the social consciousness to lead debate and be held up as a sector at the forefront of sustainability

Forget energy saving lightbulbs, think about reuse of everything; grow staff teams from within, not externally; recruit locally not nationally; always use Open Source tech; always work with local systems suppliers; always support neighbouring suppliers; always keep old systems, building new when needed, avoid anything new; always examine past artistic programme to see if older work can be extended, revisited. Look for long term partnerships, work with agencies and orgs that have equitable swaps for your programming or skills; build diversity

into absolutely every part of the creative business. Embrace Creative Case for Diversity at every level

Funding, policy, visions, mission of our sector is more clearly about working/living/creating within the earth's limits in an interdisciplinary way with other sectors

Going paperless!

Greater understanding, commitment and action arising

Harnessing renewable energy sources that are fair and cheap, removing profit incentives for companies which farm non-renewable energy and placing more emphasis on incentivising a cleaner, fairer approach to protecting the planet, animals, wildlife and developing energy systems

Having a place where we can go for support when we want to implement a change and are not sure how to do it. A network or website of ideas

Highly creative, low carbon, dynamic, fluid, commons based society

I believe that we should aim for not only a sustainable, but regenerative creative and cultural sector. We should endeavour to apply ecological design and Whole Systems thinking throughout all the interactions of our trade. Ecological living will deeply empower music and the arts; they mutually support each other's prosperity, and that of the Earth's

I subscribe to the SiPA commitments

I would like to see environmental issues front and centre in the mainstream art world

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. If we can reduce the pollution / waste from the creative sector across the board our sector can (and should) lead the way to conversations about the environment

Improved use of materials and recycling. Improved energy use. Creating work that raises the issues and challenges preconceptions about human responsibility to the future and the environment

Increased connectivity and partnership between regional venues to ensure that maximum benefit can be achieved from International touring i.e. providing a framework in which an international company can tour across venues in a strategic manner which minimises carbon footprint and reaches the highest number of people in the most effective way

Inspiration events which both entertain and engage the public with ideas on how to do things differently

I've done some research on this as part of an MA - the main barrier to building infrastructure is the payback period - and the difficulty of convincing landlords that measures are worth undertaking. Most creative organisations are run by socially aware people who I find are open to ideas around environmental sustainability - very often they lack capacity, clout with landlords and knowledge to be able to have an impact

Leaving the planet's abundance of resources in a better/safer state for future generations than we found them

Less general waste in creating theatrical shows. Reused sets, costumes, props etc. A shift away from the idea that each show must be built from scratch from the ground up then destroyed at the end of the run

Less paper, posters, flyers, brochures etc

Less waste; more creativity

Less waste: more cooperation between organisations

Let's all continually improve rather than wait while those who try hardest are criticized, or
willed to fail

Lots of small actions rather than one big one will make the difference

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

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

More knowledge of how to be eco sustainable and it being cost effective

More organisational responsibility across the board

Being able to offer more training and mentoring for others in supporting work in this area

One that collaborates and inspires

One that has a positive environmental impact, shares its vision with audiences and inspires
them to be part of the solution

One that is leading in the challenge against climate change

One that is properly financially supported to enable it to improve people's lives

One that shares ideas, spaces and materials to make better art for more people

One that works together and thinks REALLY long-term; that links social justice to action and
that is part of the change to people's lives and their experience of those changes

One where sustainability is seen as being central and not an add-on

One where the arts emphasise the responsibilities we have to our planet right here and right
now

One which can build awareness and inspire a positive vision of a zero-carbon future through
our work; and where resources are carefully and purposefully managed with an understanding
of their true value; and sustainable practice is second nature

One which is innovative, creative, responsive and informed. Where sustainability is
meaningfully and actively embedded within the sector to the extent that we no longer need to
talk about it

One whose decisions and commitments recognise the needs of future generations

Oxygen making and pollutant absorbing environments

Partnerships with environmental agencies

Placing at the heart of everything we do across programming and operations in the cultural.
Commitment for senior management. Supportive and sharing knowledge in how to do that in a
functional, realistic way

Producers and venues working together to minimise the environmental impact of their work -
as a receiving venue there will always be a degree of emissions produced as shows travel to
and from our venue but we can do what we can to minimise that

Productions which have a Carbon Budget, as well as a Monetary Budget

Recycled paper all the way and investment into digital publishing reading

Resource-neutral (photographic) practice; climate change and environmentalism a primary
focus

Running on renewables is key

Stop all wars and spend the money on environmental needs including the creative and cultural sector

Sustainability through reducing waste and our carbon footprint through reduced travel

That all of the sector is committed to including environmental sustainability as a key objective

That it becomes second nature within the work place and for our audiences

That it is embedded as the only way to do it / make decisions. We off set our touring impact with all our other activities and day to day running

That the sector is a place for us to explore our relationship with the natural world. That this discourse will help our communities forge a better future for all of us

That we use our positive 'credit' with society to challenge 'its hard to be green' with 'its enjoyable/fun/rooted/life sustaining to be green'

That we use renewal energy throughout our organisations and homes and that it is introduced affordably and works effectively

The ability to respond creatively to a collective problem

The creative and cultural sector should be fully engaged with creating a more environmentally sustainable future, both in terms of how we operate our organisations and in terms of engaging and informing our audiences with the key issues

The sector knows how much energy is used in daily activities (putting on a show, touring etc)

The supported recrudescence of the Library sector as a community resource and a place for books

To be able to teach our audiences about carbon literacy through art, film, theatre and engagement

To be as close to carbon neutral as possible

To be part of an informed sector which understands from case studies and best practice elsewhere the impact of change and its benefits rather than solely pushing a 'something must be done' agenda

To connect local concerns with global impacts through a series of artist-led projects in Finsbury Park where we based. Connecting experience of shared values for public park space with digital networked spaces

Touring to become environmentally friendly

Transparency

Waste nothing - From great ideas to scenery it all has value

We need more shows of the quality of "The man who planted trees". Poor delivery and poor didactic scripting. Focus on local rural development interventions - 80% our audiences walk to the venues

Where environment issues become part of everyday management

Find out more
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