Julie's Bicycle
SUSTAINING CREATIVITY

BOP CONSULTING

Sustaining Creativity Survey

Actions and attitudes from the creative community: environmental sustainability 2014

Technology Strategy Board
Driving Innovation

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Contents

Introduction

'Sustaining Creativity' will demonstrate that climate change and sustainability are essential to a holistic understanding of cultural value. The programme will ask **why we don't measure that value on scales that weigh natural capital, the risks of inaction, or creative invention for a sustainable future**. What might our creative and cultural industries look like if they did? Where would they find inspiration, how would they be made and valued? How do the arts measure up now, to themselves and to the rest of the world? And would any of it make a difference? Over the next year we will attempt to answer these questions.

As part of this work Julie's Bicycle and BOP Consulting conducted the most comprehensive survey to date with leaders of creative and cultural organisations on environmental sustainability, and this report summarises the findings.

In 2007, the year Julie's Bicycle was started, the air was thick with good intent founded on a refreshing if somewhat simplistic sense of the possible. We were sure we would deal with climate change. But the size and globally entwined problems of sustainability eroded agency and interest; instead much early entrepreneurial enthusiasm was diverted to stabilise, and then grow, the creative economy using orthodox indicators of success. With some fantastic exceptions business as usual kicked in.

The reaction to tough times has been simultaneously to go on the offensive by creating demand, and the defensive by making the case for creativity, evidencing value on balance sheets and then how it spirals out into communities, the workforce, economies, and general wellbeing. Not a week goes by when an editorial on culture and value doesn't appear somewhere. And in the creative industries the investment-value equation isn't only the financial and social returns that, say, health or community investment bring; it also assumes that art can be a force for good. It plunges us into other realms – of complexity, identity, community, joy, empathy – and through these 'other' experiences can help to solve 'human condition' problems, like poverty, inequity and even, perhaps, climate change. This works wonderfully well. Overall, both the commercial and not for profit creative industries are net generators of value flows. Curiously though, value as it relates to the environment is wholly absent from this conversation.

Julie's Bicycle is resolved, politely, to interrupt.

Julie's Bicycle has data – lots of it. At the time of writing there are 1,772 registered Creative Industry Green Tool users, our online carbon calculators. Over the next year we will increase that number to, conservatively, 2,300. This is a rich source of intelligence, illuminating opportunities for improvement and innovation. But what it doesn't do is capture the collective heart, the culture of the creative community as expressed through feelings, attitudes and actions.

This survey proves what anecdotally we already know: that this is a community that wants to come together, to learn from one another and scale that knowledge. The combined force of all the creative industries working together is unsurpassed when it comes to crafting culture: as such they are key drivers for developing a sustainable worldview.

Artists have begun to scrunch up the scripts just as design is turbo-charging circular thinking and the ubiquity of

[1] Covering Combined Arts, Dance, Literature, Museums, Music, Theatre, Visual Arts. We will add to these sectors in subsequent years.

the digisphere shows how rapidly disruptive movements can change everything. **All these creative disciplines, combined, should be at the forefront of the holistic rethink.** But are they? As this survey highlights there is a lot still to be done, particularly on leadership.

Too much of the creative sector still needs convincing that shaping its own cultural values around natural constraints and sustainable innovation is really worth it. **There aren't nearly enough creative pioneers for whom the 'light bulb' moment means a whole way of seeing, rather than an LED.**

Without an evidence base we are reliant on anecdotes to prove to the creative community that there is everything to gain and no time to lose, and prove to the world that the arts are catalysts for sustainability.

Our evidence starts here.

Alison Tickell
CEO Julie's Bicycle

"[A community] that is involved creatively in problem-solving – creatives working alongside scientists, technologists, educationalists etc. to come up with solutions, helping with hearts and minds as well as tangible alternatives to environmental damage."

Executive summary

Headline trends

The results show a creative community that is varied, with diverse levels of understanding, activity and needs with respect to environmental sustainability. Clear trends are:

1. High engagement across the sector, with strong affirmation of the importance of sustainability, and an emergent vision and desire to lead change. The strongest driver for engagement is the personal commitment of staff.

2. Encouraging levels of action, with scope to further embed environmental sustainability into operations and communications of most organisations. Around half of organisations have also created work that concerns environmental sustainability, though very few consistently focus on this.

3. For many, action leads to financial and/or reputational benefits, though environmental sustainability is yet to be perceived as a core business concern by executive and non-executive directors.

4. Appetite to come together and take a lead through peer groupings, knowledge transfer and networking.

5. Despite the high engagement level and the financial and reputational benefits of incorporating environmental sustainability, there remains a value-action gap (the gap between the values and attitudes of an individual/organisation, and the actions. This is true of the population as a whole.) Environmental sustainability is seen as a priority but actions do not match attitudes.

Key findings and Julie's Bicycle commentary

Overall, the responding organisations reach a combined audience of 70 million, and represent a combined turnover of over £1 billion. They represent organisations in the Combined Arts, Dance, Literature, Museums, Music, Theatre and Visual Arts sub-sectors. The geographical spread includes cultural organisations from England, Scotland and Wales with a regional representation, and a diverse mix of organisation type and size.

Business drivers

Of the 337 organisations who participated in the survey:

- 55% of respondents have experienced financial benefits as a result of action.
- 40% of respondents have experienced benefits to their profile and reputation as a result of action.
- 62% of respondents indicated that environmental sustainability will become increasingly important to their business over the next two years.
- Virtually all respondents believe it is relevant to them.

Organisational change

The survey analysed organisational change by looking at the drivers for action on environmental sustainability, engagement (attitudes), behaviour (actions), benefits, challenges and support needs. The headline findings were:

- Organisations that are more engaged are aware of the range of drivers for improving environmental sustainability (such as compliance with regulation, senior leadership commitment, financial benefits and risks associated with climate change).
- Organisations that are more aware of the drivers tend to do more.

- There is not necessarily a link between actions and benefits. This suggests that action is motivated by various reasons, not only financial or reputational gains.
- Organisations that feel more challenged are likely to do less, but feeling challenged doesn't inhibit the ability to realise financial and other benefits.
- There is no single overwhelming challenge that affects everyone, rather a spectrum of challenges of which 'time' seems to be the most commonly cited.

"The creative industries have a real opportunity to lead the way in this field."

Leadership

The survey has identified sixty-five leading organisations[2].

- 19% of respondents from this survey can be identified as taking a lead, representing sixty-five organisations[3].
- Staff commitment is cited as a key driver for environmental sustainability from all sectors.
- Overwhelmingly leadership is coming from the middle of organisations.
- Climate impacts and risks, and governance are weak drivers for action and cited as the lowest drivers for change along with audience demand.
- The highest number of leading organisations are based in North East England, then Yorkshire and South East England.
- Building managers/owners are more likely to be leaders.
- Organisations with some public funding tend to do more, perhaps more used to public accountability. This is reinforced by the results from the commercial music industry which, despite being early sustainability pioneers[4], is mainly absent from the leadership cohort.
- New sources of income and new audiences/consumers come out top as the most important elements of success, despite the financial benefits experienced by 55% of organisations as a result of action on sustainability and the 40% of organisations that experience benefits to their profile and reputation, both representing opportunities to optimise financial and audience/consumer relations.
- The proportion of Arts Council England funded organisations in this leaders list represents 63%. We conclude that organisations subject to the Arts Council's environmental measuring and reporting requirements are more likely to be leaders.
- Theatre and Visual Arts out-perform on a number of fronts - practical, artistic and innovative - but both sectors consider themselves to be low performing in relation to others with only 15% and 9% respectively thinking that they do more. At the other end of the spectrum Literature perceives itself as doing the most, but is the least engaged and perceives sustainability as the least relevant, followed by Music. ***It seems that the more the nature of the sustainability challenge is understood the smaller achievements appear to be***. This is an important insight for leadership.

[2] In this section leadership is relative to the sector, not to the wider economy. Mainstream sustainability leadership is often located in consumer goods industries such as fashion, food and manufacturing, think tanks, new technology markets, and consortia of businesses already impacted by energy and commodity security, asset risks, and other business critical issues. Leadership here is defined as three or more examples of: ongoing environmental impact measurement, policy implementation, a range of operational actions, environmetal auditing/certification, board/shareholder/owner commitment, commissioning, sustainable capital or refurbishment, renewable energy sourcing, communication with audiences/artists/contractors/funders and supporters, championing the green economy.

[3] This correlates to a separate recent analysis by Julie's Bicycle of the Arts Council England National portfolio, Major partner museums and Bridge organisations. In the Arts Council England analysis we identified 10% as leading, equating to seventy organisations. 143 organisations from the Arts Council portfolio in total contributed to the Sustaining Creativity survey (42%).

"The creative and cultural sector can affect change in people's perceptions and I believe there's a real chance that this sector could have a great impact on the nation's attitudes to environmental sustainability by leading by example."

Vision

Over half of the respondents shared a personal sustainability vision for their organisation (quoted throughout this report). Many of them expressed a vision for the cultural sector to be leading the environmental sustainability agenda within society using cultural leverage to communicate with audiences. Yet in the survey, the overwhelming resistance to commissioning work on sustainability or to communicating with audiences suggests that ***there is a misalignment between the personal vision of committed staff and the missions and artistic visions of organisations***.

The most common vision expressed was an industry where environmental awareness and sustainable practice are the norm, an integral part of all business and artistic activity and equal to financial, social, access and artistic priorities.

Visions cited at least five times or more were:

- Leading on sustainable thinking and best practice by example, leveraging its cultural leadership to affect change on a global scale.
- Collaborating with other sectors on finding solutions and changing attitudes and behaviours.
- Sharing values as a basis for action.
- Actively communicating, inspiring and engaging audiences and consumers with sustainability.
- Developing and making sustainable creative work.
- Perceiving sustainability as an artistic opportunity, not a compromise.
- Reducing carbon ambitiously including dependence on fossil fuel-based energy; effectively managing resources and materials, zero waste to landfill; capital redevelopment for future-proofing; and encouraging low-carbon transportation.
- Supporting a robust policy framework and also legislation.

[4] In 2007 the UK music industry contributed to the biggest footprinting exercise from the creative industries ever (First Step: UK Music Industry Carbon Footprint 2007; University of Oxford). As a result the industry formed a number of high level working groups to address impacts. This work has continued, but has not yet translated into public leadership.

"We all share a passion to enrich people's lives through the arts. This flows from a belief in the fundamental importance of creative practice to a rich life, alongside good health, economic security and environmental sustainability. It is vital that this is sustained not just for today's audience but for future generations. The long term sustainability of our actions is essential, and non-negotiable."

Conclusion

The creative and cultural community is a literate and networked sector not yet in leadership mode but there are high levels of motivation and action, strong indications of a range of benefits and a firm foundation for deeper engagement.

Consensus is not yet shared on the threats of climate change inaction, nor on the relevance of environmental issues to the creative community; new markets and emergent economies (circular, shared and digital economies); buildings (fabric, comfort, energy/commodity sourcing, pricing); temporary events (weather, access, safety, infrastructure, energy); touring (carbon and cost); audiences (reputational risk and opportunity, safe guarding, comfort); and governance itself (understanding risk and long term stewardship, investment opportunities, managing cost and innovating into the future). The sector is not yet convinced of the business case for action and therefore is not recognising the opportunities sustainability presents for the future.

Above all, most of the creative community is not yet inspired. Such inspiration is likely to come only when the magnitude and relevance of the sustainability challenge is widely understood.

In the sixty-five leading organisations action is happening on a number of fronts and senior staff are taking a lead. It is no coincidence that these organisations articulate their commitment to environmental sustainability publicly, expressing it as multi-dimensional and mission-critical. However, bridging the value-action gap, even for the most ambitious and creative minds, is still challenging, just as it is in wider society. Trying to reconcile conflicting demands and desires requires difficult and often compromised choices which can undermine energy and purpose.

There is a need to articulate the difference between genuinely insurmountable challenges and limitations, and those that feel insurmountable.

Time, cited as the top challenge is a good example. The perception of little time is underpinned by an attitude that doesn't feel the full force of environmental sustainability. Unlike physical constraints (such as running large festivals on 100% off-grid renewables) time is an interpreted quality. It is a constraint but one that we hope will lessen as priorities shift.

Despite all this, the best organisations are leading a cultural renaissance, whether it be through commissions, communications, operations or innovation. There is an emerging vision shared by many that cultural leadership needs to value environmental literacy and build a creative infrastructure based on sustainable practice. In this community especially, which deals with interpretation and imagination, thought leadership, drawing on creative practice, might just become the critical determinant of wider cultural values.

"[We need] a shift of philosophy to enable the sector to unlock the pledges it has made faithfully to be environmentally sustainable – this is about being a progressive movement of thinkers, makers and artists."

What is your personal vision for an environmentally sustainable creative and cultural sector?

"a world leader in sustainable thinking"

"environmental sustainability is … in our DNA"

"low-impact production technologies"

"travel-savvy audiences in well-planned cities"

"The longterm sustainability of our actions is essential, and non-negotiable."

"environmental sustainability is the norm … like breathing, it simply just happens"

"to see artistic work created and delivered in an intrinsically sustainable manner"

"A creative and cultural sector that's attentive to human impact on the environment and works together collectively to re-imagine our role in developing solutions."

"That the sector shares resources and engages in collective action to reduce its environmental impact."

"One that understands that financial and environmental sustainability are not mutually exclusive."

"greater communication between groups involved in climate preservation and artistic work"

"Make an arts user an ethical green consumer automatically."

"a circular economy"

"transparency"

"where a sustainable future is the bottom line, not profit"

"embedded in arts organisations' visions and missions"

"Greatly reduced dependence on fossil fuel-based energy through improved access to cost-effective green energy tariffs and local, renewable energy generation."

"A zero waste to landfill approach to waste disposal."

"educate communities, audiences and the general public through hand-on inspirational examples of environmental ideas and technology, creative output and sustainable working practices"

"inspire the people it engages with to be the change they want to see"

"I'd like to see the Theatre and Arts sector leading the debate rather than waiting for legislation."

"Building sustainability into all core activities and budgets."

"One where everyone shares responsibility."

"The creative industries have a real opportunity to lead the way in this field. "

"Where all people involved have the means to access a rich cultural life with reduced environmental impact."

" The cultural and creative sector can affect change in people's perceptions and I believe there's a real chance that this sector could a great impact on the nation's attitudes to environmental sustainability by leading by example."

"I want our sector to be a world leader in sustainable thinking, promoting and developing sustainable practices so that all productions are made with this principle in mind, and our actions are an example to others."

"involving audiences in environmental targets and policies"

"That our sector as a whole recognises environmental sustainability alongside financial and organisational stability as drivers for success and change, and that environmental issues have a role in developing creative vision and artistic development."

"It must be people facing and co-authored, creating a sense of shared values and actions."

"One which reflects audience concerns and informs the wider public."

"A sector that is leading the way in the UK and elsewhere in the world. A sector that is open and transparent about successes and failures. A sector that is happy to share resources and knowledge. A sector that has clear benchmarks for good practice - and some practical advice around how to achieve these."

"One where creative and cultural organisations are equipped with the skills and resources to consider environmental sustainability as a factor in all decisions."

"sustainability is … seen as an opportunity rather than an artistic compromise"

"The sector is informed, mindful of and responsible about its environmental impact and resource use, seeking creative and collaborative ways to limit waste, minimise energy use and ensure that every gram of carbon we use really counts in our pursuit of a vibrant cultural life in this country."

"rethinking the future"

"As well as reducing its emissions and footprint, the creative sector works with other sectors to create projects/ideas/focus points that raise awareness of environmental sustainability."

"A sector that sets a deliverable and credible example to all stakeholders."

"influence its millions of audiences to change their behavior to be more sustainable"

"maximising the value of both creative and financial investment in order to maintain the cultural offer"

"Honesty and less pressure to create 100% unique designs."

"leverage their cultural leadership to help society more generally make that change"

"The sector is using its influence to affect changes in the lifestyle and habits of its audiences, staff, and wider stakeholders."

Sub-sector profiles

Combined Arts

- 23% of the total number of respondents (78).
- 50% own or operate a building/venue.
- 68% have an environmental policy.
- Staff engagement is the strongest activity.
- Content or programme creation on sustainability is the smallest activity.
- Over a quarter (26%) feel they are doing more than most, second only to Literature.
- 81% think that environmental sustainability is very or extremely relevant.
- 68% think that environmental sustainability has become more important to their organisation over the last two years.
- 65% think that it will become more important over the next few years.
- Commitment of staff is the top driver, closely followed by finance.
- The weakest driver is avoiding the risks associated with climate change.
- 47% have experienced financial benefits (9% having seen a lot of benefit).
- 43% have reported reputational benefits.
- 58% (a high comparative percentage) of Combined Arts respondents shared their personal sustainability vision for the sector/their organisation.

Dance

- 6% of the total number of respondents (21).
- 33% own or operate a building/venue.
- 81% have an environmental policy.
- Staff engagement and sustainability in capital/refurbishment are the largest activity types.
- Content creation on sustainability and the 'triple bottom line' are the smallest.
- Just 10% perceive themselves as doing more than other sectors, coming second from last (Visual Arts at 9%).
- 100% consider environmental sustainability to be relevant, though only 19% consider it to be extremely so, second from last across the full cohort.
- 66% think environmental sustainability has become more important to their organisation in the last two years.
- 68% think it will get more important over the next two years.
- Sustainability drivers were all scored highly especially commitment of staff, financial issues, external reputation and compliance, all of which came out above other sectors.
- The weakest driver for sustainability action is avoiding the risks associated with climate change.
- 52% have realised financial benefits.
- Only 19% have reported reputational benefits.
- Time is perceived as the biggest challenge.
- 52% shared their personal sustainability vision for the sector/their organisation.

Literature

- 4% of survey respondents (13), the smallest proportion (sector size is also small).
- 54% of respondents have an environmental policy, the lowest number across the survey.
- Literature performs the least in terms of actions although there is a spike in 'engagement with suppliers'.
- Literature perceives that it does more than most: at 31%, this was higher than any of the other subsectors.
- It has the highest proportion of any sector thinking that environmental sustainability is not relevant at 17%, and the lowest thinking it is extremely relevant (8%).
- However, 50% think it is very relevant.
- 67% think it has got more important to their organisation over the last two years.
- 70% think it will increase in importance over the next two years, unlike most other sectors.
- Overall drivers are similar to others. However, they are the least engaged around mission or vision for the organisation. They are also the least concerned about the effects of climate change.
- This sector has seen the smallest financial benefit at 38%.
- Only 23% have seen reputational benefits for their organisations.
- Nevertheless, at almost 70%, the highest number of people shared their personal visions for sustainability.

Museums

- 7% of the total number of respondents (23 organisations).
- 78% own or operate a building/venue.
- 61% have an environmental policy.
- Just over half of organisations are taking regular action around sustainability, lower than average.
- Museums are the strongest on environmental sustainability in refurbishment and capital programmes.
- Environmental impact measurement, triple bottom line approaches and creating content and programmes on environmental themes are the weakest areas of activity.
- 17% perceive themselves as doing more than others.
- 85%, the second highest proportion, think it extremely or very relevant.
- 67% think it has become more relevant to their organisations over the last two years.
- Only 54% felt it would continue to become more relevant over the next two years.
- Financial benefits are the biggest driver, and 75% have already experienced financial benefits with 25% of that being significant benefits. This is the highest across all cohorts.
- 61% have reported reputational benefits with 9% being substantial benefits. This is the highest across all cohorts.
- Risks associated with climate change are the weakest driver.
- Time and lack of funds are the major challenges.
- 52% of respondents shared their personal sustainability vision for the sector/their organisation.

Music

- 17% of the total number of respondents (56).
- 23% own or operate a building/venue.
- 57% have an environmental policy.
- Most of the respondents are from the commercial music industry.
- In relation to other sectors activity was lower, with just under half of organisations regularly taking sustainable actions.
- Staff engagement is the strongest activity.
- Content or programme creation on sustainability is the smallest activity, and the smallest across the arts, on a par with Theatre.
- 18% of organisations perceive they do more than most.
- 70% think that sustainability is extremely or very relevant, and 10% think that sustainability is not at all relevant. This is the second highest percentage, only exceeded by Literature (17%).
- 66% think that sustainability has become more important to their organisation in the last two years.
- 63% think it will get more important over the next years.
- The commitment of trustees or parent body is the weakest driver, and Music experiences this more keenly than other sectors, closely followed by risks associated with climate change.
- 41% have experienced financial benefits.
- 39% have reported reputational benefits.
- Time and audience engagement are major challenges.
- 54% of respondents shared their personal sustainability vision for the sector and/or their organisation.

Theatre

- Highest response rate representing 30% of the total (103).
- 54% own or operate a building/venue.
- 67% have an environmental policy.
- Staff engagement is the highest activity type.
- Content or programme creation on sustainability is the most minimal activity and the smallest across the arts, on a par with Music.
- Strong on measuring impacts, along with Visual Arts.
- Below the overall average when selecting green suppliers; considering the environment when producing work or programmes; and communicating externally.
- Only 15% of Theatre respondents perceive themselves as doing more than other sectors, coming third from last.
- 81% of Theatre organisations recognise that environmental sustainability is extremely or very relevant (a high proportion)…
- …and the only organisation in the whole survey that considers it to be not at all relevant also comes from Theatre.

- Largest percentage of respondents who perceive the issue to have become more important to their organisation over the last two years (78%).
- 65% think it will increase in importance in coming years.
- The strongest driver is staff commitment, with financial benefits and compliance close behind.
- Consumer demand, climate impacts and trustee pressure are the weakest drivers of sustainability action.
- 59% have realised financial benefits.
- 36% have reported reputational benefits.
- Time is perceived as the biggest challenge.
- 59% of Theatre respondents shared their personal sustainability vision for the sector/their organisation.

Visual Arts

- 13% of the total overall respondents (43).
- 79% have an environmental policy and a high action focus, and they performed most consistently across all actions against all the other sectors.
- Visual Arts had the lowest perception of themselves as leading the arts and cultural sector, with only 9% feeling that Visual Arts do the most in environmental sustainability.
- However, they had the highest perception of relevance with 92% of respondents thinking environmental sustainability was extremely or very relevant.
- They also performed highly in thinking that sustainability has become more important over the last 2 years (78%) and thinking it will continue to do so (67%).
- In terms of drivers, the Visual Arts felt strongly about all of the top four drivers, with engagement with audiences being the lowest driver.
- 51% of organisations had experienced both financial and reputational benefits.

"The creative sector is uniquely placed to inform and share to our widest population without being directive and free from political bias. [My vision is for a] sector [that] is using its influence to affect changes in the lifestyle and habits of its audiences, staff, and wider stakeholders."

Methodology

The survey was designed by Julie's Bicycle and BOP Consulting. The target audience was senior management and leadership within the cultural sector across England, Scotland and Wales.

Invitations to participate were distributed in December 2013 via the Julie's Bicycle contact database, and strategic sector agencies such as Arts Council England, membership bodies and networks.

We received over 370 responses, with some organisations or individuals duplicated. Our working sample has 337 responses. Responses came from Combined Arts, Dance, Literature, Museums, Music, Theatre and Visual Arts.

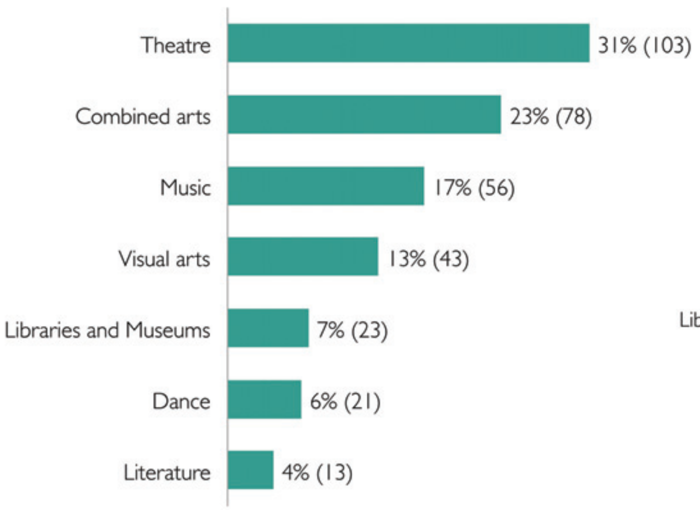
Analysis and review of the results was led by BOP with input from Julie's Bicycle.

Survey results

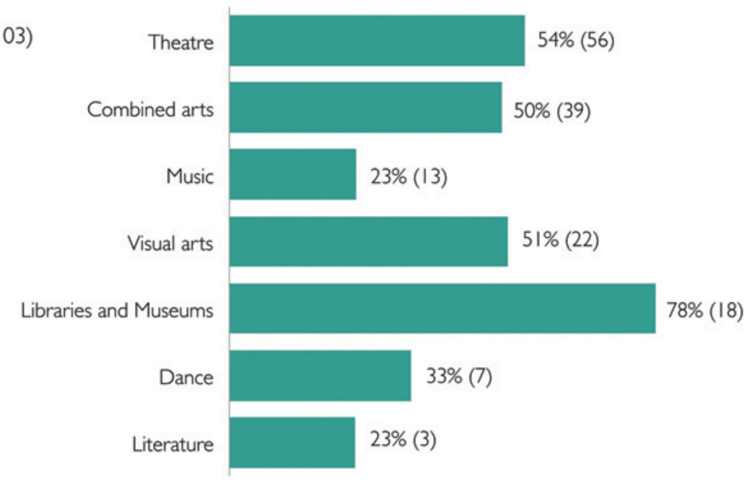
Demographics

There is good representation from across the cultural sector.

What part of the creative and cultural sector does your organisation belong to?



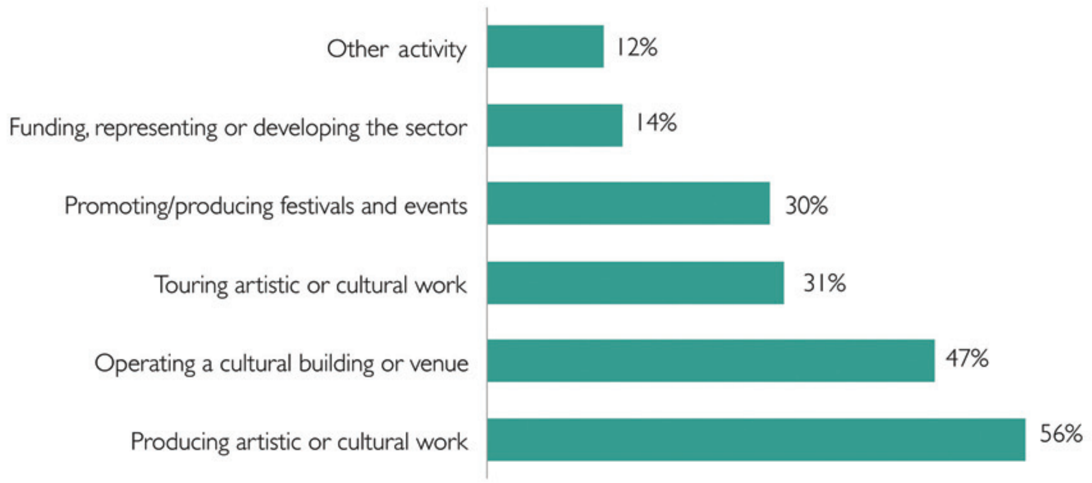
Proportion of respondents by subsector who are operating a building or venue.[5]



[5] Two libraries responded, and were included under Museums.

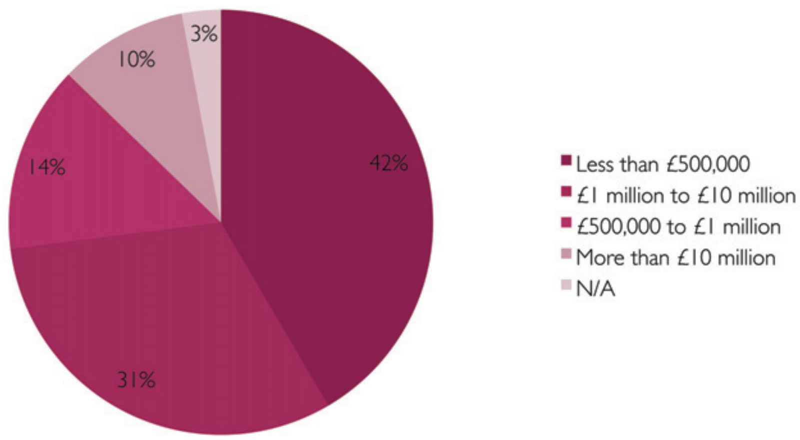
All kinds of organisations are represented.

Which of these describe your organisation's main activities?

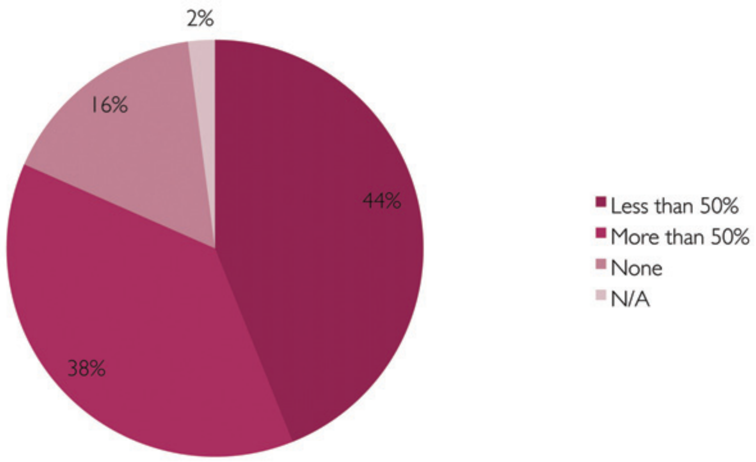


There is a good balance between the different levels of turnover and public funding.

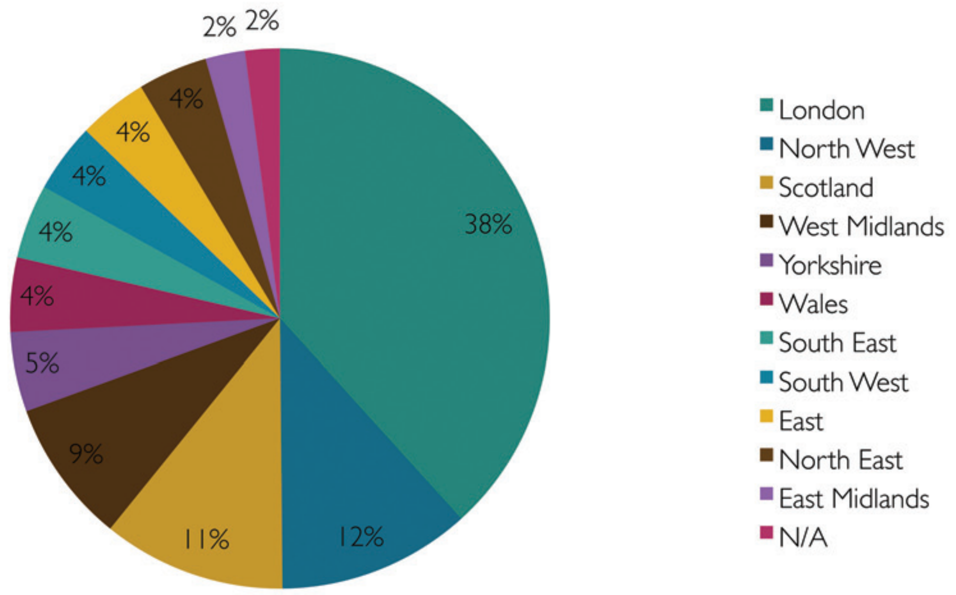
What is your organisation's total turnover each year?



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



All regions in England were represented, with a bias towards London.[6] Responses were also received from Scotland and Wales.

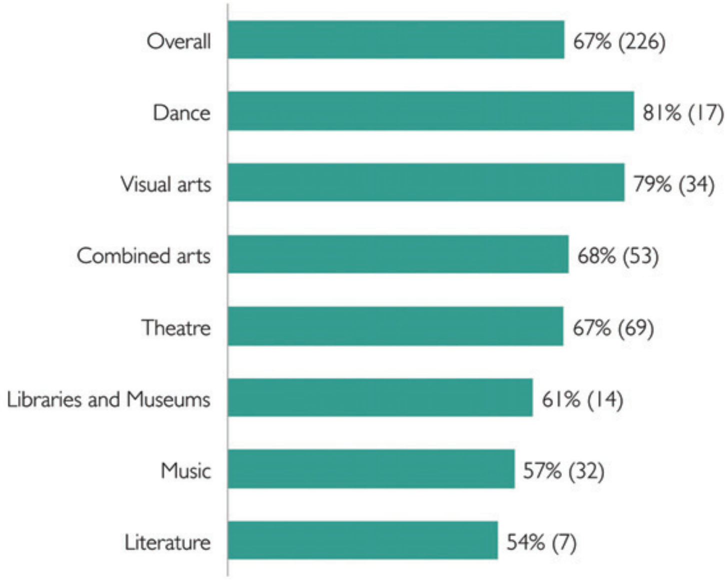


[6] Respondents' locations were derived from postcodes.

How organisations are taking action

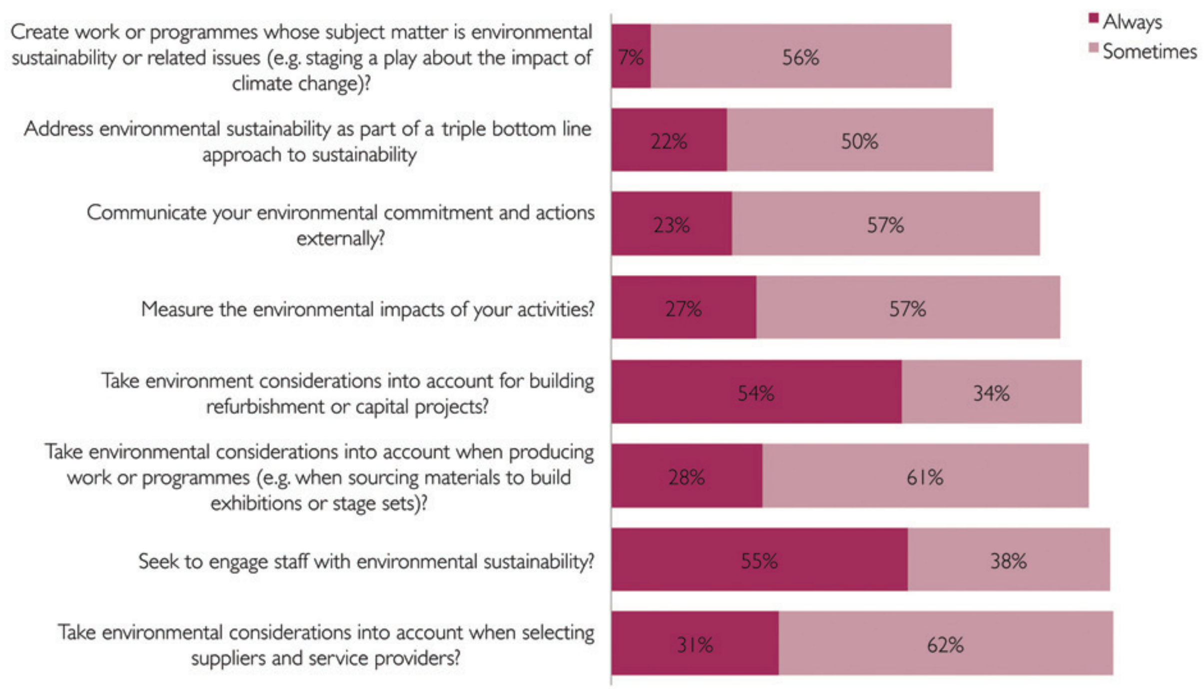
Two thirds of organisations have an up-to-date environmental policy, with significant variation between sub-sectors.

Does your organisation have an up-to-date environmental policy?



At least two thirds of organisations are taking action in a wide range of areas. But very few organisations focus solely on sustainability within their artistic programmes.

Does your organisation...



Each sub-sector has a unique pattern of activity. Visual Arts organisations seem to do the most.

Does your organisation... (Never = 0, Sometimes = 1, Always = 2)

	Overall	Combined arts	Dance	Libraries and Museums	Literature	Music	Theatre	Visual arts
Seek to engage staff with environmental sustainability?	1.4	1.4	1.4	1.3	1.1	1.3	1.4	1.6
Take environment considerations into account for building refurbishment or capital projects?	1.2	1.3	1.4	1.7	0.8	0.9	1.2	1.3
Take environmental considerations into account when selecting suppliers and service providers?	1.2	1.2	1.1	1.1	1.2	1.0	1.1	1.4
Take environmental considerations into account when producing work or programmes?	1.1	1.1	1.0	1.1	0.8	1.0	1.0	1.3
Measure the environmental impacts of your activities?	1.0	1.0	1.0	0.9	0.9	1.0	1.1	1.2
Communicate your environmental commitment and actions externally?	1.0	1.0	0.9	1.0	0.8	0.9	0.9	1.2
Address environmental sustainability as part of a triple bottom line approach to sustainability?	0.9	0.9	0.6	0.9	0.7	0.8	0.8	1.1
Create work or programmes whose subject matter is environmental sustainability or related issues?	0.6	0.7	0.6	0.9	0.8	0.5	0.5	0.9

Operators of cultural buildings are overall more likely to take action, particularly on staff engagement and on refurbishments or capital projects.

Does your organisation... (Never = 0, Sometimes = 1, Always = 2)

	Overall	No building	Building
Seek to engage staff with environmental sustainability?	1.4	1.3	1.5
Take environment considerations into account for building refurbishment or capital projects?	1.2	0.9	1.6
Take environmental considerations into account when selecting suppliers and service providers?	1.2	1.1	1.2
Take environmental considerations into account when producing work or programmes?	1.1	1.0	1.1
Measure the environmental impacts of your activities?	1.0	1.0	1.1
Communicate your environmental commitment and actions externally?	1.0	0.9	1.0
Address environmental sustainability as part of a triple bottom line approach to sustainability?	0.9	0.8	0.9
Create work or programmes whose subject matter is environmental sustainability or related issues?	0.6	0.6	0.7

Publicly funded organisations do more, but the level of funding does not matter.

Does your organisation... (Never = 0, Sometimes = 1, Always = 2)

	Overall	More than 50%	Less than 50%	None	N/A
Seek to engage staff with environmental sustainability?	1.4	1.4	1.6	1.1	0.8
Take environment considerations into account for building refurbishment or capital projects?	1.2	1.2	1.4	0.9	0.7
Take environmental considerations into account when selecting suppliers and service providers?	1.2	1.2	1.2	1.0	0.7
Take environmental considerations into account when producing work or programmes?	1.1	1.2	1.1	0.9	0.7
Measure the environmental impacts of your activities?	1.0	1.1	1.1	0.9	0.7
Communicate your environmental commitment and actions externally?	1.0	1.0	1.0	0.8	0.8
Address environmental sustainability as part of a triple bottom line approach to sustainability?	0.9	0.9	0.9	0.7	0.5
Create work or programmes whose subject matter is environmental sustainability or related issues?	0.6	0.7	0.7	0.5	0.3

Scale of organisation is not a major influence (only the smallest organisations are doing less).

Does your organisation... (Never = 0, Sometimes = 1, Always = 2)

	Overall	More than £10 million	£1 million to £10 million	£500,000 to £1 million	Less than £500,000	N/A
Seek to engage staff with environmental sustainability?	1.4	1.4	1.5	1.4	1.3	0.8
Take environment considerations into account for building refurbishment or capital projects?	1.2	1.5	1.5	1.3	0.9	0.9
Take environmental considerations into account when selecting suppliers and service providers?	1.2	1.1	1.2	1.2	1.2	0.8
Take environmental considerations into account when producing work or programmes?	1.1	1.2	1.0	1.1	1.1	0.8
Measure the environmental impacts of your activities?	1.0	1.1	1.2	1.1	0.9	0.8
Communicate your environmental commitment and actions externally?	1.0	1.1	1.1	1.0	0.8	0.8
Address environmental sustainability as part of a triple bottom line approach to sustainability?	0.9	0.9	0.9	0.9	0.9	0.4
Create work or programmes whose subject matter is environmental sustainability or related issues?	0.6	0.6	0.6	0.6	0.7	0.3

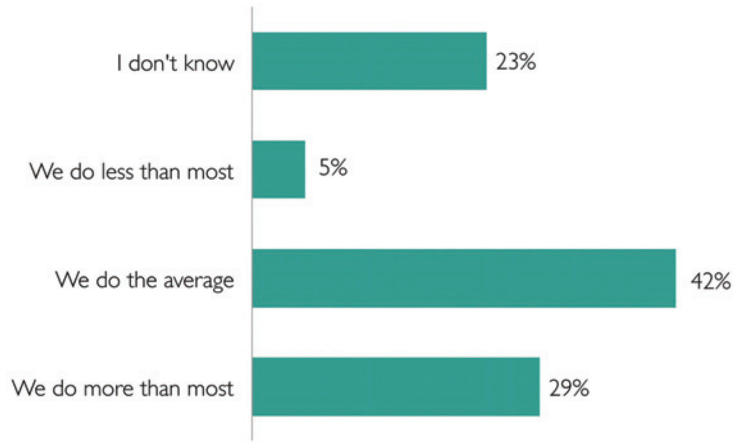
There seem to be major differences between leading regions and low scoring regions.[7]

Does your organisation... (Never = 0, Sometimes = 1, Always = 2)

	Overall	East	East Midlands	London	North East	North West	Scotland	South East	South West	Wales	West Midlands	Yorkshire
Seek to engage staff with environmental sustainability?	1.4	1.4	1.6	1.3	1.9	1.6	1.2	1.5	1.1	1.2	1.4	1.6
Take environment considerations into account for building refurbishment or capital projects?	1.2	1.7	1.3	1.2	1.7	1.4	0.8	1.6	1.0	1.3	1.2	1.3
Take environmental considerations into account when selecting suppliers and service providers?	1.2	1.4	1.3	1.2	1.3	1.2	0.9	1.5	1.1	1.3	1.2	1.4
Take environmental considerations into account when producing work or programmes?	1.1	1.1	1.4	1.1	1.3	1.2	0.9	1.4	1.1	1.2	1.0	1.3
Measure the environmental impacts of your activities?	1.0	1.1	1.1	1.0	1.5	1.2	0.8	1.5	1.0	1.1	1.0	1.1
Communicate your environmental commitment and actions externally?	1.0	1.1	1.1	0.9	1.4	0.9	0.8	1.1	0.8	0.9	1.0	1.1
Address environmental sustainability as part of a triple bottom line approach to sustainability?	0.9	0.9	1.4	0.9	1.0	0.7	0.6	1.1	0.6	1.0	0.9	1.0
Create work or programmes whose subject matter is environmental sustainability or related issues?	0.6	0.9	0.9	0.6	0.8	0.5	0.6	1.0	0.6	0.6	0.8	0.8

Most respondents feel that they do the same, or more, than their peers in their sub-sector.

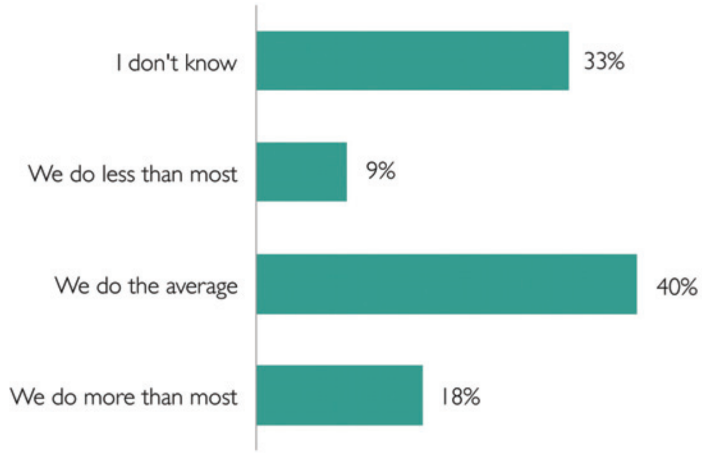
How do you think your organisation's actions compare with others in your creative and cultural sub-sector (e.g. Theatre, Visual Arts)?



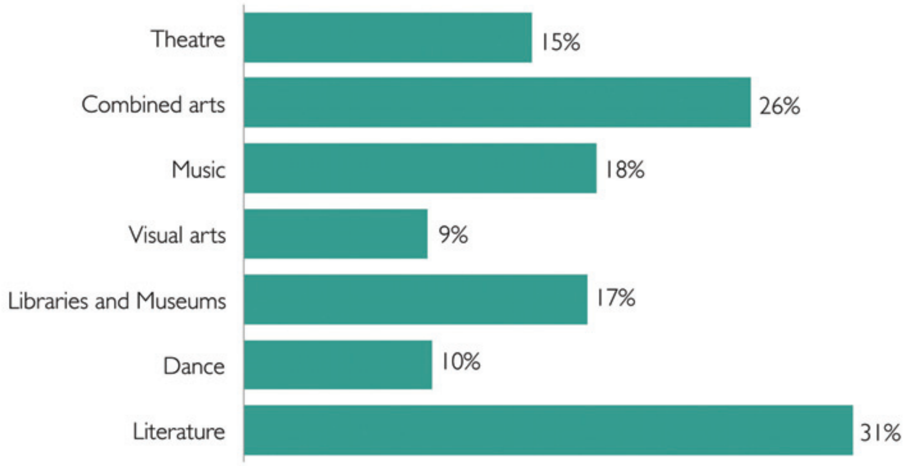
[7] Note that the number of responses was low for certain regions compared to others.

No sub-sector feels that it is in the lead.

How do you think your subsector's actions compares with the creative and cultural sector as a whole? (Response across sectors)

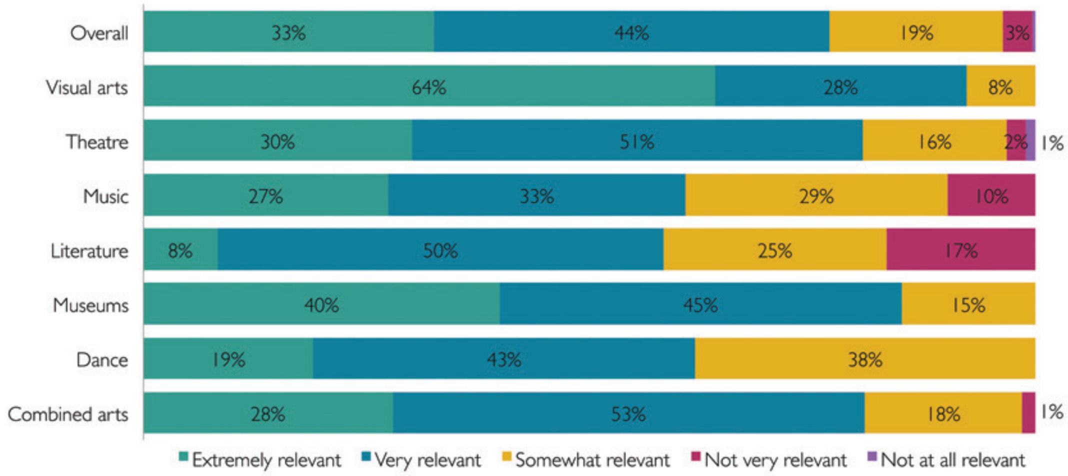


Percentage answering "We do more than most" within each sub-sector.



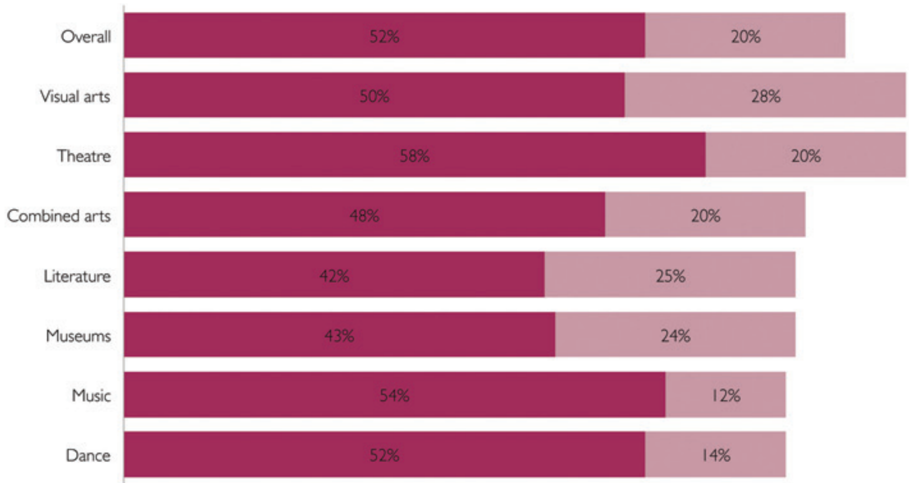
Attitudes

Virtually all organisations believe that environmental sustainability is relevant to them. Visual Arts organisations seem to be the most passionate.



All sub-sectors believe that environmental sustainability has become increasingly important.

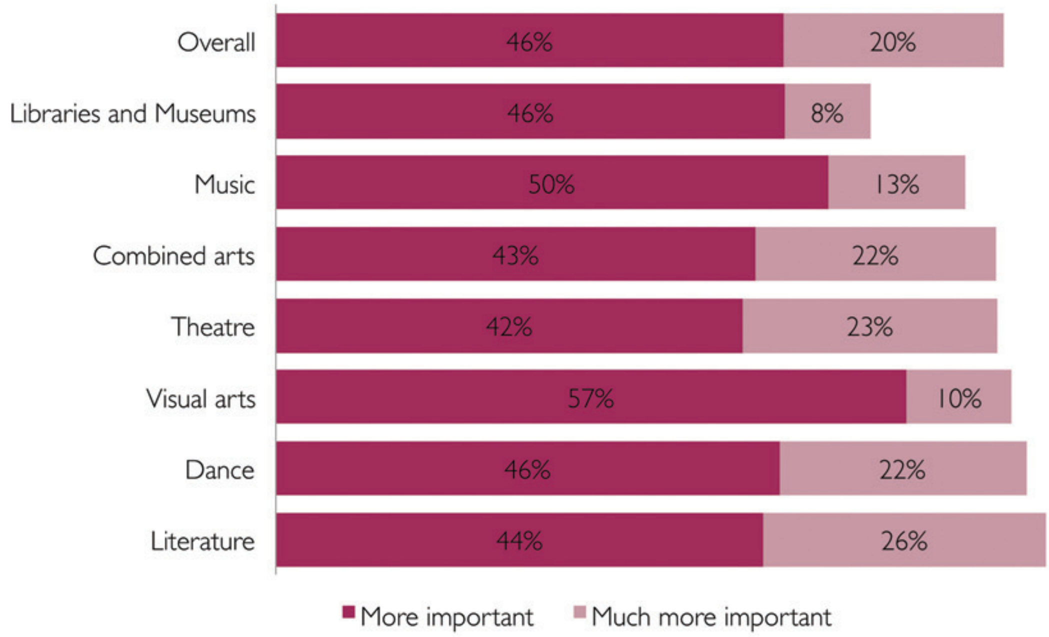
How has the importance of environmental sustainability changed in your organisation over the LAST two years?



Only 5 organisations believe that environmental sustainability is less important now compared to two years ago.

They believe that environmental sustainability will continue to grow in importance.

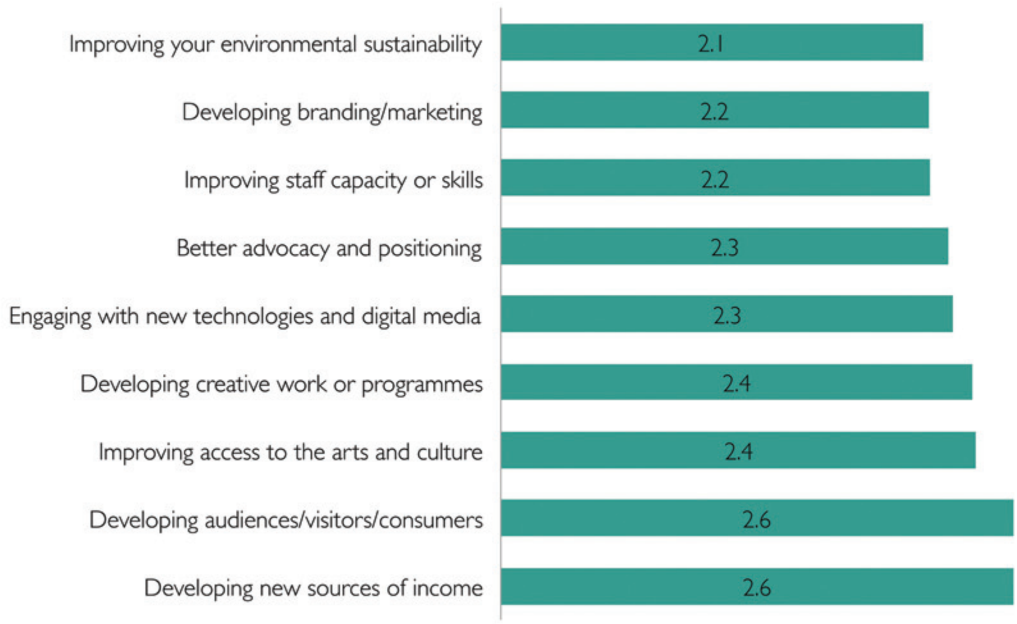
How do you anticipate the importance of environmental sustainability changing in your organisation over the NEXT two years?



Only one organisation believes that environmental sustainability will become less important in the future.

However, environmental sustainability is not yet seen as one of the most pressing priorities.

What are your priorities for improving or strengthening your organisation?
(N/A = 0, Not a priority = 1, Some priority = 2, High Priority = 3)



More positively, improving environmental sustainability is a 'high priority' for almost 40%.

What are your priorities for improving or strengthening your organisation? (percentage answering 'high priority').

Operators of cultural buildings are more likely to rate environmental sustainability as a priority (though it is still not the highest priority).

What are your priorities for improving or strengthening your organisation?
(N/A = 0, Not a priority = 1, Some priority = 2, High priority = 3)

	Overall	No	Yes
Developing new sources of income	2.6	2.5	2.7
Developing audiences/visitors/consumers	2.6	2.5	2.7
Improving access to the arts and culture	2.4	2.3	2.5
Developing creative work or programmes	2.4	2.3	2.5
Engaging with new technologies and digital media	2.3	2.2	2.3
Better advocacy and positioning	2.3	2.2	2.3
Improving staff capacity or skills	2.2	2.1	2.2
Developing branding/marketing	2.2	2.0	2.3
Improving your environmental sustainability	2.1	2.0	2.3

Northern regions and the South East are more likely to rate all priorities as more pressing.

What are your priorities for improving or strengthening your organisation?
(N/A = 0, Not a priority = 1, Some priority = 2, High priority = 3)

	Overall	East	East Midlands	London	North East	North West	Scotland	South East	South West	Wales	West Midlands	Yorkshire
Developing new sources of income	2.6	2.4	2.5	2.5	2.9	2.9	2.5	2.9	2.6	2.6	2.7	2.6
Developing audiences/ visitors/consumers	2.6	2.5	2.6	2.5	2.9	2.8	2.6	2.8	2.6	2.7	2.6	2.7
Improving access to the arts and culture	2.4	2.3	2.4	2.3	2.6	2.6	2.4	2.8	2.5	2.2	2.5	2.6
Developing creative work or programmes	2.4	2.3	2.0	2.3	2.7	2.7	2.3	2.5	2.4	2.3	2.4	2.6
Engaging with new technologies and digital media	2.3	2.4	2.3	2.2	2.8	2.4	2.2	2.7	2.4	2.2	2.3	2.5
Better advocacy and positioning	2.3	1.9	2.0	2.2	2.8	2.5	2.3	2.5	2.1	2.1	2.3	2.3
Improving staff capacity or skills	2.2	2.1	1.9	2.1	2.6	2.5	2.2	2.4	2.2	2.0	2.1	2.4
Developing branding/marketing	2.2	2.0	2.3	2.1	2.6	2.3	2.1	2.5	2.4	1.9	2.2	2.2
Improving your environmental sustainability	2.1	2.0	2.0	2.1	2.6	2.2	2.1	2.6	2.1	2.2	2.2	2.3

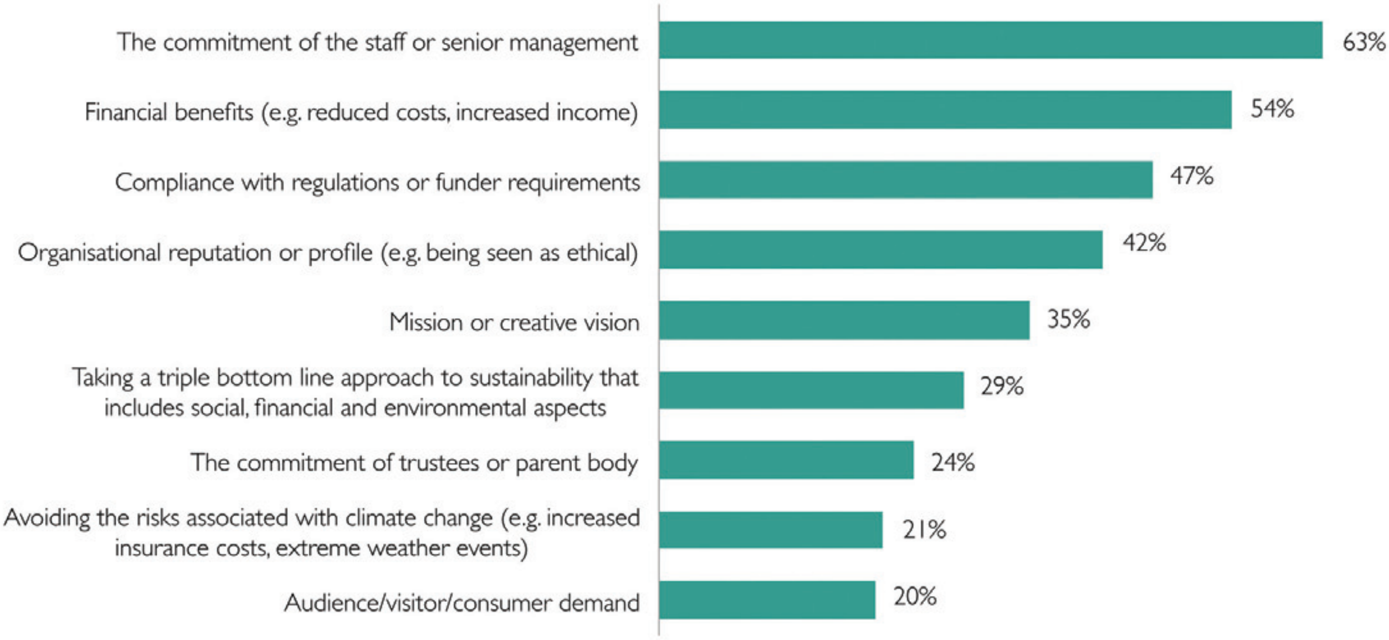
Priorities: other analyses

- There are no clear differences by sub-sector.
- Publicly funded organisations generally rate all the priorities as more pressing, though the level of public funding does not matter.
- Size of organisations (by turnover) does not have any effect.

Drivers

The main driver for environmental action is staff commitment. Audience demand is a weak driver at present.

Percentage of respondents identifying this as a 'Major driver'.



The overall pattern is largely repeated across the sub-sectors. Dance organisations feel most strongly incentivised by these drivers.

(N/A = 0, Not a driver = 1, Minor driver = 2, Major driver = 3)

	Overall	Combined arts	Dance	Libraries and Museums	Literature	Music	Theatre	Visual arts
The commitment of the staff or senior management	2.4	2.3	2.6	2.2	2.5	2.4	2.4	2.3
Financial benefits (e.g. reduced costs, increased income)	2.3	2.2	2.6	2.3	2.1	2.3	2.2	2.3
Compliance with regulations or funder requirements	2.2	2.1	2.8	2.0	2.3	2.1	2.2	2.2
Organisational reputation or profile (e.g. being seen as ethical)	2.1	2.0	2.6	2.0	2.2	2.0	2.1	2.3
Mission or creative vision	2.0	2.0	2.1	1.8	1.8	1.9	2.0	2.3
Taking a triple bottom line approach to sustainability that includes social, financial and environmental aspects	1.9	1.8	2.0	1.9	2.1	1.8	1.9	2.0
The commitment of trustees or parent body	1.8	1.8	2.0	2.0	2.2	1.5	1.8	1.9
Audience/visitor/consumer demand	1.8	1.8	2.0	1.7	2.0	1.9	1.7	1.7
Avoiding the risks associated with climate change (e.g. increased insurance costs, extreme weather events)	1.8	1.7	1.9	1.6	1.8	1.7	1.8	2.0

Publicly funded organisations are more responsive to these drivers particularly those with a mixed funding base (less than 50% publicly funded).

(N/A = 0, Not a driver = 1, Minor driver = 2, Major driver = 3)
Size of organisations by turnover did not affect the results.

	Overall	More than 50%	Less than 50%	None
The commitment of the staff or senior management	2.4	2.3	2.6	2.1
Financial benefits (e.g. reduced costs, increased income)	2.3	2.2	2.5	1.9
Compliance with regulations or funder requirements	2.2	2.3	2.4	1.5
Organisational reputation or profile (e.g. being seen as ethical)	2.1	2.1	2.3	1.8
Mission or creative vision	2.0	1.9	2.1	1.9
Taking a triple bottom line approach to sustainability that includes social, financial and environmental aspects	1.9	1.9	2.0	1.6
The commitment of trustees or parent body	1.8	1.9	1.9	1.3
Audience/visitor/consumer demand	1.8	1.7	2.0	1.6
Avoiding the risks associated with climate change (e.g. increased insurance costs, extreme weather events)	1.8	1.7	1.9	1.6

The overall pattern is largely repeated across the regions, with some outliers.

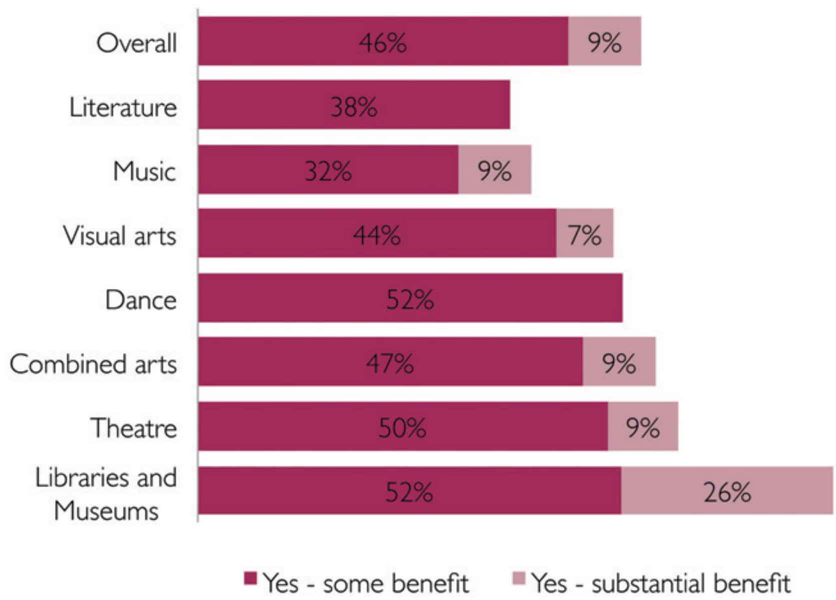
(N/A = 0, Not a driver = 1, Minor driver = 2, Major driver = 3)

	Overall	East	East Midlands	London	North East	North West	Scotland	South East	South West	Wales	West Midlands	Yorkshire
The commitment of the staff or senior management	2.4	2.4	2.1	2.4	2.8	2.5	2.3	2.9	2.3	2.2	2.6	2.4
Financial benefits (e.g. reduced costs, increased income)	2.3	2.1	2.0	2.2	2.8	2.5	2.1	2.7	2.3	2.1	2.4	2.6
Compliance with regulations or funder requirements	2.2	1.8	1.8	2.2	2.5	2.4	2.2	2.3	1.9	2.1	2.3	2.3
Organisational reputation or profile (e.g. being seen as ethical)	2.1	2.1	2.3	1.9	2.7	2.3	2.2	2.5	2.1	1.9	2.4	2.4
Mission or creative vision	2.0	2.0	2.0	1.8	2.6	2.1	2.0	2.3	2.3	1.8	2.1	2.1
Taking a triple bottom line approach to sustainability that includes social, financial and environmental aspects	1.9	1.9	1.9	1.9	2.3	2.1	1.7	2.3	1.9	1.9	2.1	1.8
The commitment of trustees or parent body	1.8	2.0	1.3	1.6	2.4	1.9	1.9	2.3	1.6	1.7	2.0	2.1
Audience/visitor/consumer demand	1.8	1.9	1.8	1.6	2.5	1.9	1.9	2.1	1.9	1.9	2.1	1.7
Avoiding the risks associated with climate change (e.g. increased insurance costs, extreme weather events)	1.8	1.9	1.6	1.7	2.5	1.9	1.6	2.0	1.8	1.3	1.9	2.1

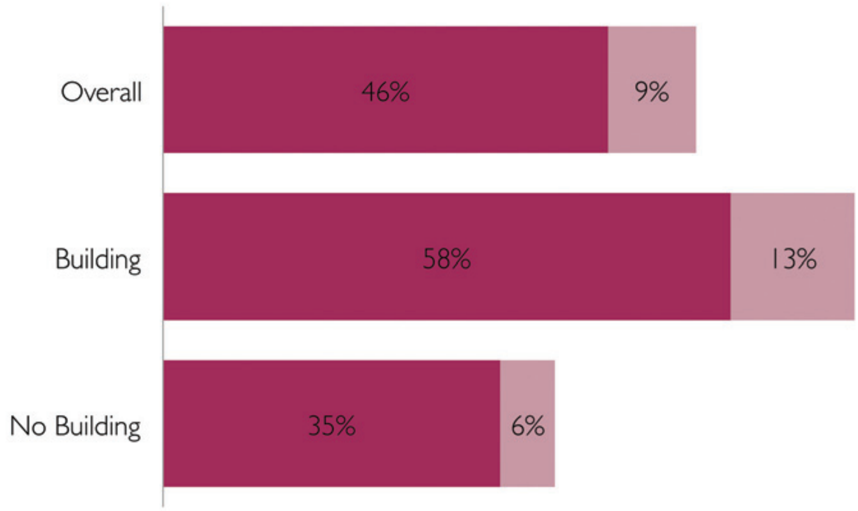
Benefits

55% of organisations have experienced financial benefits. Museums seem to get the most benefit…

Has your organisation already experienced any financial benefits because of its environmental actions?

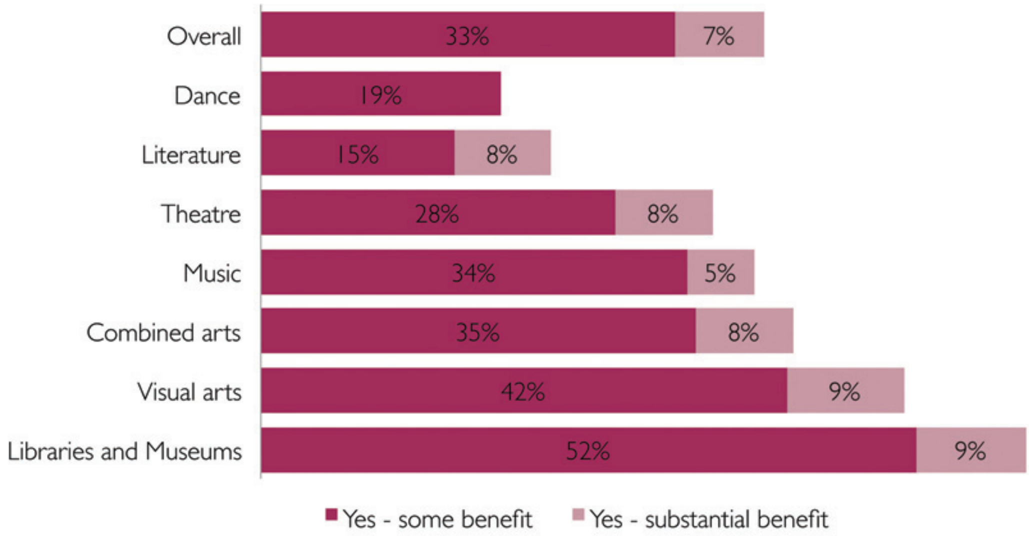


...possibly because building operators are more likely to achieve financial benefits.



40% of organisations have experienced benefits to their profile and reputation, with substantial variance between sub-sectors.

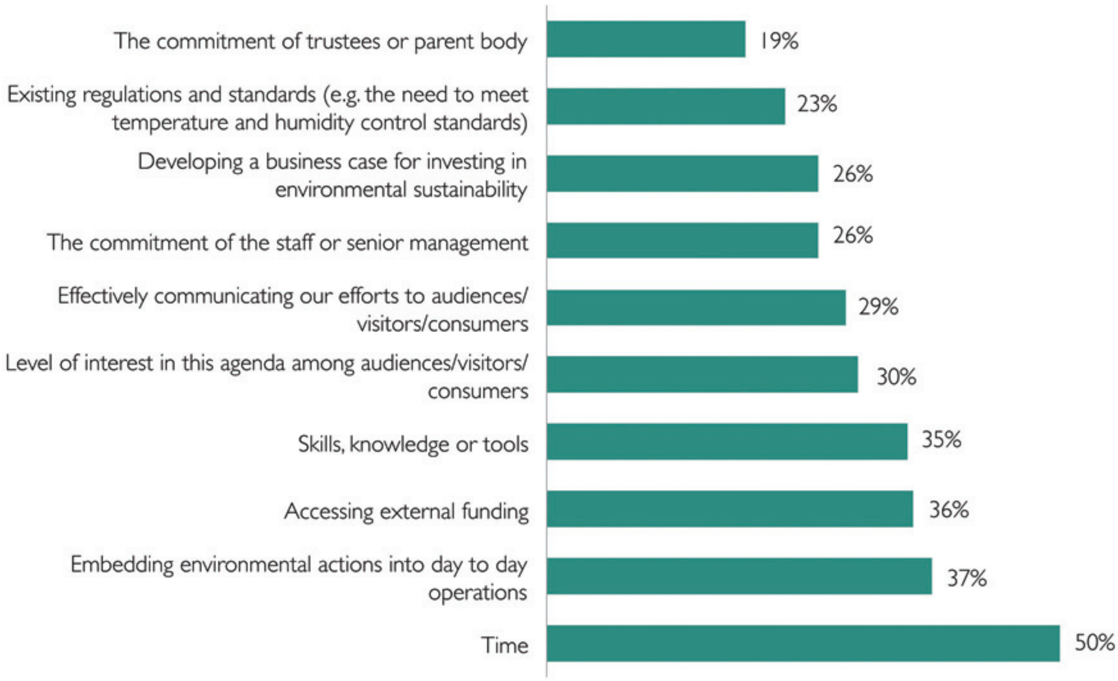
Has your organisation already experienced any benefits to its profile and reputation because of its environmental actions?



Challenges and support needs

Organisations face a range of challenges but there is no single challenge that affects everyone.

Percentage of respondents answering "Yes this is a challenge for us".



Museums and Music feel the challenges most keenly - with a particular need to develop a business case for sustainability.

Percentage of respondents answering "Yes this is a challenge for us".

	Overall	Combined arts	Dance	Libraries and Museums	Literature	Music	Theatre	Visual arts
Time	50%	38%	57%	48%	31%	57%	57%	47%
Embedding environmental actions into day to day operations	37%	36%	43%	43%	31%	38%	39%	33%
Accessing external funding	36%	40%	33%	48%	15%	34%	36%	30%
Skills, knowledge or tools	35%	35%	43%	35%	15%	38%	37%	30%
Level of interest in this agenda among audiences/visitors/consumers	30%	38%	29%	35%	23%	38%	24%	21%
Effectively communicating our efforts to audiences/visitors/consumers	29%	32%	19%	35%	31%	23%	30%	30%
The commitment of the staff or senior management	26%	23%	29%	30%	8%	36%	25%	26%
Developing a business case for investing in environmental sustainability	26%	22%	29%	43%	0%	38%	21%	30%
Existing regulations and standards (e.g. the need to meet temperature and humidity control standards)	23%	17%	33%	35%	15%	29%	18%	30%
The commitment of trustees or parent body	19%	15%	19%	26%	8%	29%	16%	23%

Larger organisations can find it more difficult to embed actions and get staff on board (but skills and funds are less of an issue for them).

Percentage of respondents answering "Yes this is a challenge for us".

	Overall	More than £10 million	£1 million to £10 million	£500,000 to £1 million	Less than £500,000
Time	50%	36%	56%	46%	50%
Embedding environmental actions into day to day operations	37%	45%	45%	27%	33%
Accessing external funding	36%	27%	41%	31%	36%
Skills, knowledge or tools	35%	21%	40%	35%	36%
Level of interest in this agenda among audiences/visitors/consumers	30%	33%	25%	29%	34%
Effectively communicating our efforts to audiences/visitors/consumers	29%	33%	28%	31%	29%
The commitment of the staff or senior management	26%	45%	25%	29%	21%
Developing a business case for investing in environmental sustainability	26%	30%	28%	25%	25%
Existing regulations and standards (e.g. the need to meet temperature and humidity control standards)	23%	30%	29%	27%	16%
The commitment of trustees or parent body	19%	12%	18%	27%	19%

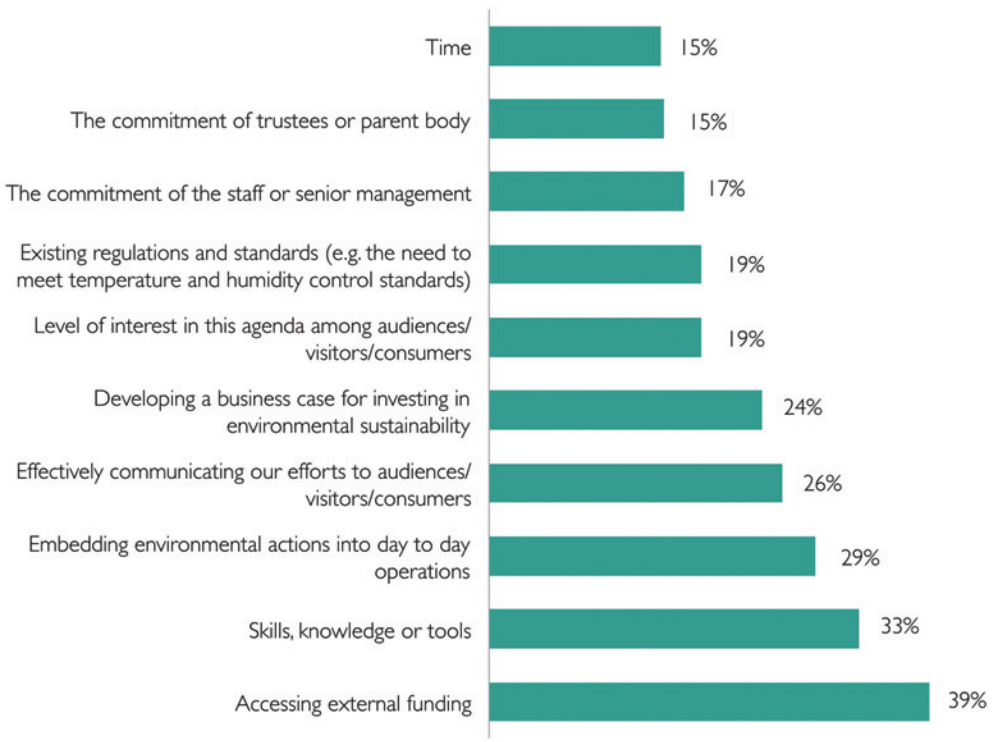
Organisations with a mixed funding base (who were more responsive to drivers) feel more challenged. This could be because they realise the extent of change required.

Percentage of respondents answering "Yes this is a challenge for us".

	Overall	More than 50%	Less than 50%	None
Time	50%	46%	57%	40%
Embedding environmental actions into day to day operations	37%	32%	44%	33%
Accessing external funding	36%	33%	43%	24%
Skills, knowledge or tools	35%	36%	37%	29%
Level of interest in this agenda among audiences/visitors/consumers	30%	31%	30%	27%
Effectively communicating our efforts to audiences/visitors/consumers	29%	28%	30%	31%
The commitment of the staff or senior management	26%	20%	30%	29%
Developing a business case for investing in environmental sustainability	26%	21%	30%	31%
Existing regulations and standards (e.g. the need to meet temperature and humidity control standards)	23%	23%	25%	20%
The commitment of trustees or parent body	19%	17%	22%	18%

Organisations have a range of support needs with accessing external funding coming top.

Percentage of respondents answering "Yes we need specialist support".

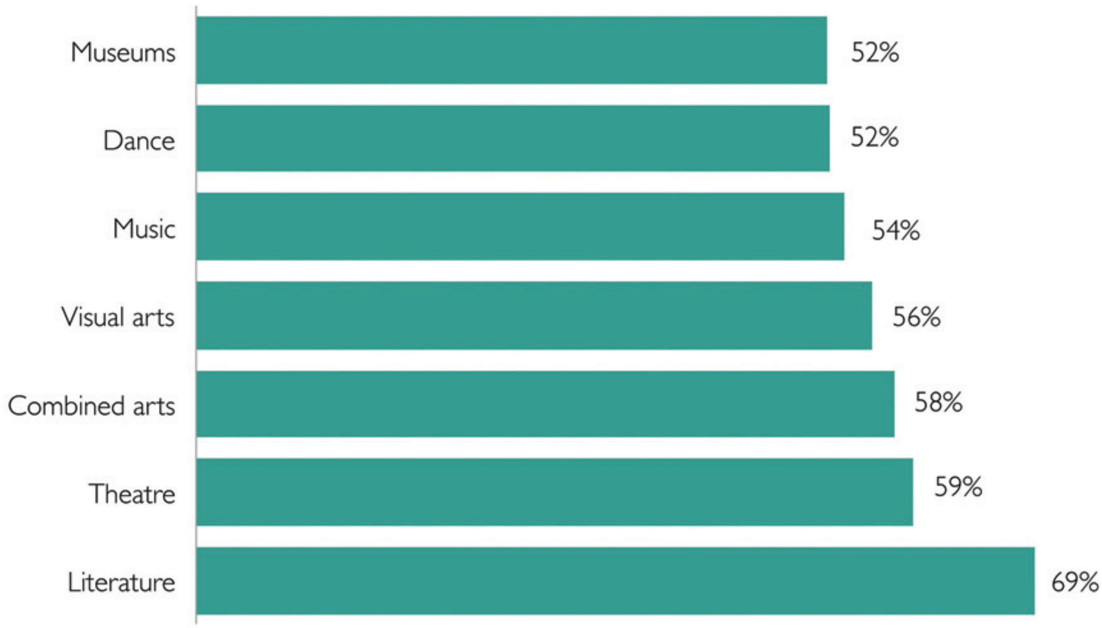


Support needs: other analyses

- Dance and Visual Arts organisations are most interested in support.
- Music and Literature organisations are least interested in support (small sample size in Literature).
- Mid-size organisations (£500k–£1m) are most interested in support.
- Very large organisations (>£10m) are least interested in support.
- Organisations with a mixed funding model (<50% public sector funded) are the most interested in support.
- No clear regional pattern.

Development of the sector

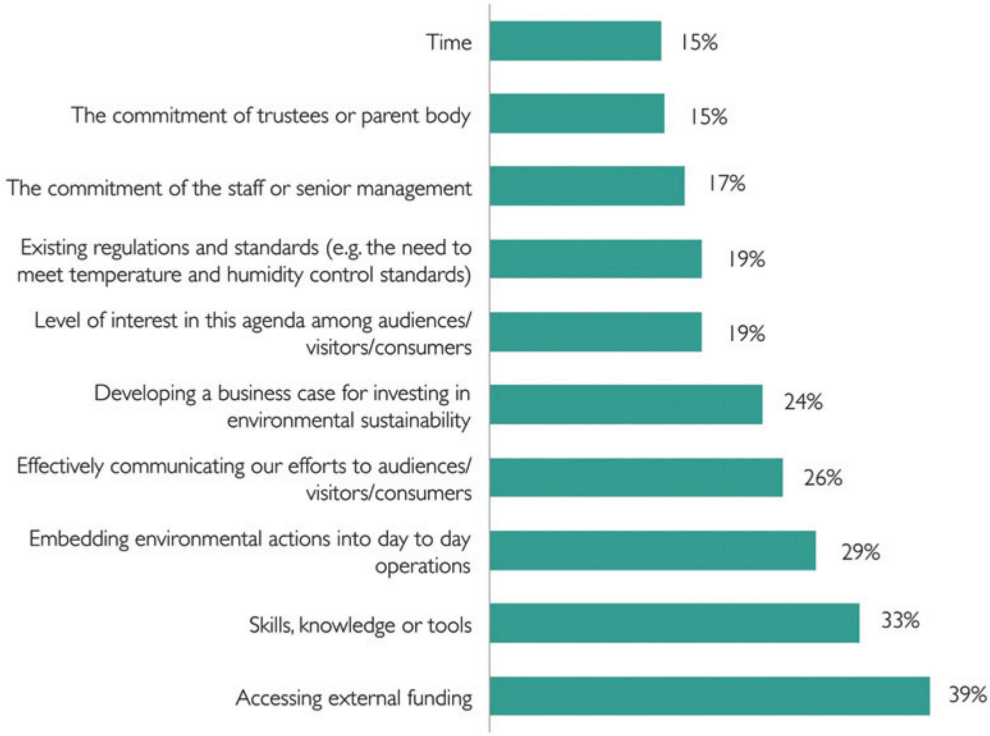
Just over half of respondents from each sub-sector shared a personal vision for an environmentally sustainable creative and cultural sector.



There is appetite for substantial collective action, particularly sharing best practices and working with funders. All sub-sectors are in agreement.

Which collective actions could accelerate environmental sustainability within the creative and cultural sector? (Average score across the sector).

(N/A = 0, No impact = 1, Minor impact = 2, Major impact = 3)



Appetite varies across regions. The North East is very enthusiastic, Wales, less so.

Which collective actions could accelerate environmental sustainability within the creative and cultural sector?

(N/A = 0, No impact = 1, Minor impact = 2, Major impact = 3)

	Overall	Combined arts	Dance	Libraries and Museums	Literature	Music	Theatre	Visual arts
Working with funders to introduce new investment and incentives	2.1	2.2	2.2	2.2	2.2	1.9	2.2	2.3
Developing a community of peers that provide opportunities to share practice and network	2.1	2.1	2.1	2.0	1.9	2.1	2.1	2.3
Developing a shared vision or action plan for the sector	2.0	2.1	2.1	2.0	2.0	2.0	2.0	2.0
Sharing information about the broader context (including scientific and political developments, trends, statistics)	1.9	1.9	1.9	2.0	1.8	1.9	1.9	1.9
High level campaigning to press or politicians	1.8	1.7	1.6	1.9	1.9	1.9	1.7	2.0
Campaigning to the general public to raise their awareness	1.8	1.8	1.6	1.9	2.2	1.9	1.7	2.0

Private sector organisations are relatively less interested in collective action (but still positive).

Which collective actions could accelerate environmental sustainability within the creative and cultural sector? (Average score across the sector)

(N/A = 0, No impact = 1, Minor impact = 2, Major impact = 3)

	Overall	More than 50%	Less than 50%	None
Working with funders to introduce new investment and incentives	2.1	2.2	2.4	1.6
Developing a community of peers that provide opportunities to share practice and network	2.1	2.1	2.3	1.8
Developing a shared vision or action plan for the sector	2.0	2.1	2.2	1.7
Sharing information about the broader context (including scientific and political developments, trends, statistics)	1.9	2.0	2.1	1.6
High level campaigning to press or politicians	1.8	1.8	1.9	1.6
Campaigning to the general public to raise their awareness	1.8	1.9	1.9	1.7

Profiling

Profiling methodology

For each organisation we derived a score for each of the six dimensions studied:

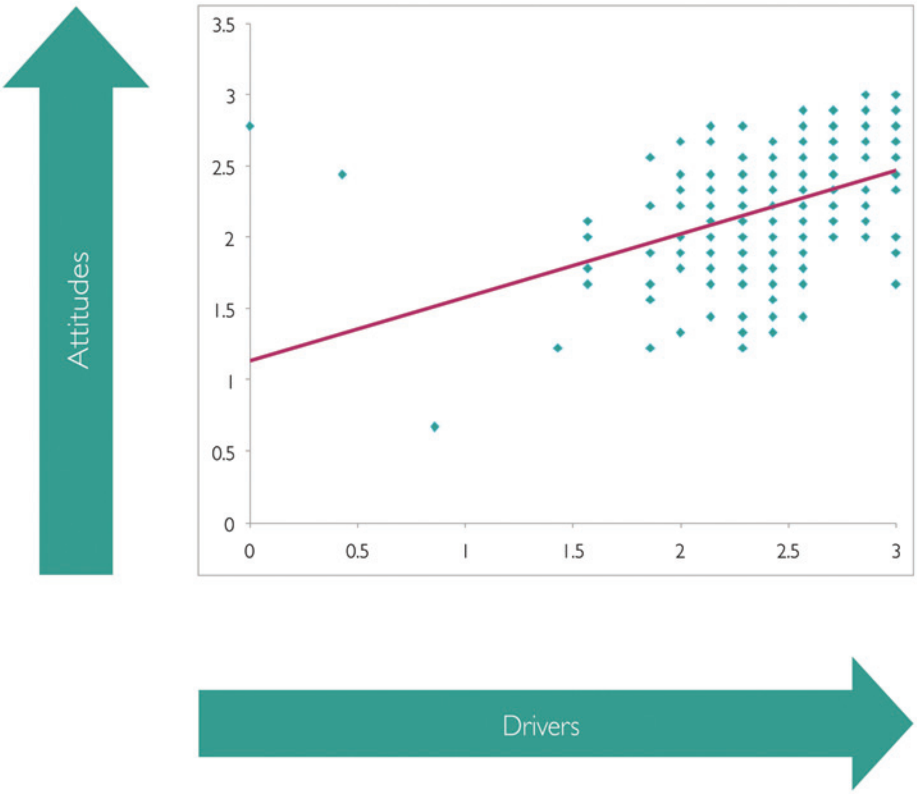
- Actions - Average score from actions presented in "How are the organisations are taking action" (0 to 2 - Always)
- Attitudes - Average score from the section "Attitudes" (from 0 to 3 - High priority)
- Drivers - Average score from the section "Drivers" (from 0 to 3 - Major driver)
- Challenges - Average score from the section "Challenges" (from 0 to 1 - Yes this is a challenge for us)
- Benefits - Average score from the section "Benefits" (from 0 to 1 - Yes we have experienced benefits)
- Impacts - Average score from the section "Development of the sector" (from 0 to 3 - Major impact)

In this section we examine how these scores are related, for example how attitudes translate into actions and benefits.

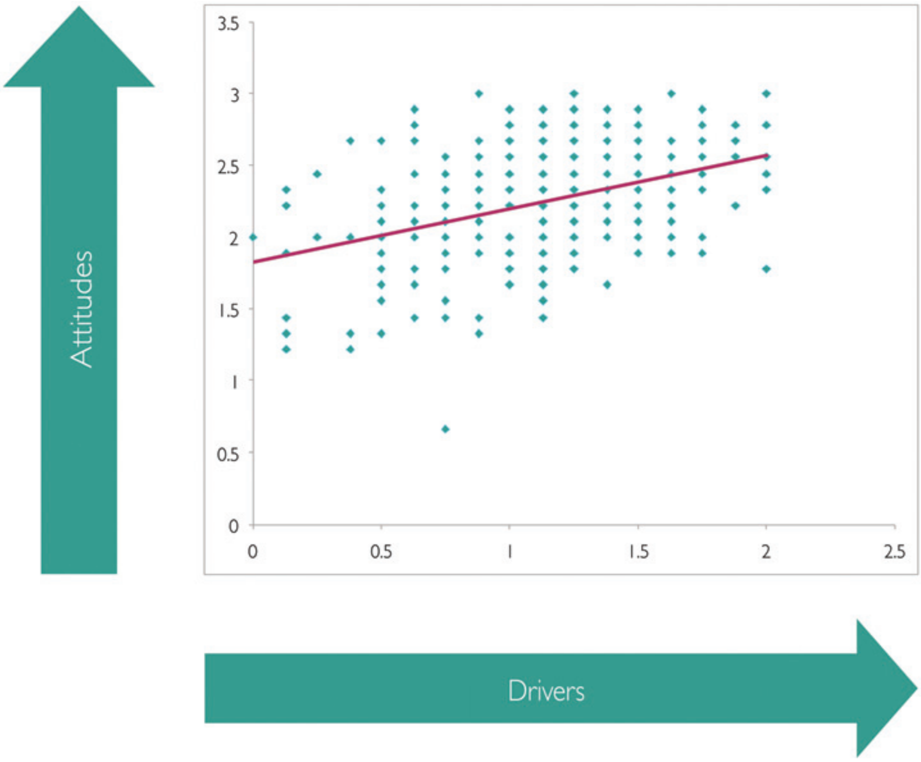
The results in this section are based on 293 organisations that answered a sufficient number of questions.

Profiling results

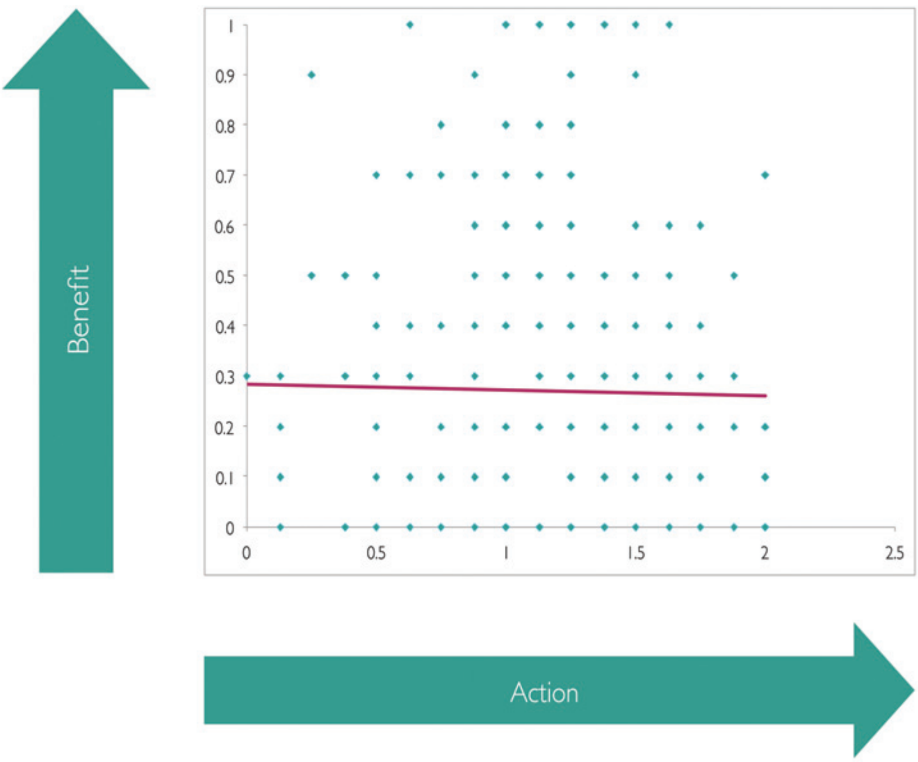
Organisations which are more engaged in general ("Attitudes") are more aware of all the drivers for environmental sustainability ("Drivers").



Organisations which are more aware of the drivers ("Drivers") tend to do more ("Actions").



Surprisingly, there appears to be no link between doing ("Actions") and experiencing financial and reputational benefits ("Benefit").



Organisations that feel most challenged ("Challenges") tend to be less engaged in general ("Attitudes") and tend to do less ("Actions").

Correlation matrix (1 = perfect positive correlation, -1 = perfect negative correlation).

	Actions	Attitudes	Drivers	Challenges	Benefits	Impacts
Actions	1.00	0.23	0.39	-0.19	-0.02	0.13
Attitudes		1.00	0.44	-0.18	0.15	0.16
Drivers			1.00	0.00	0.15	0.21
Challenges				1.00	0.06	-0.01
Benefits					1.00	0.13
Impacts						1.00

Feeling challenged ("Challenges") doesn't appear to affect the ability to realise financial and non-financial benefits from going green ("Benefits").

Correlation matrix (1 = perfect positive correlation, -1 = perfect negative correlation).

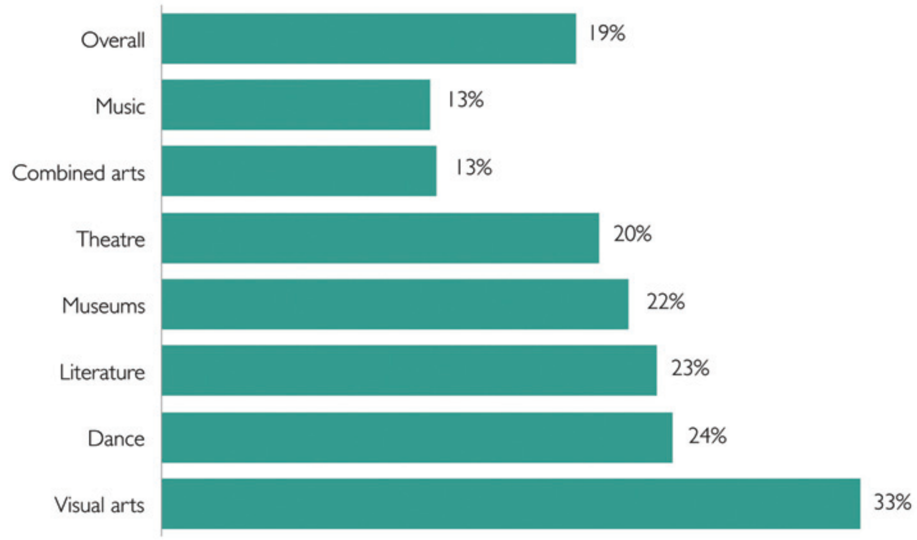
	Actions	Attitudes	Drivers	Challenges	Benefits	Impacts
Actions	1.00	0.23	0.39	-0.19	-0.02	0.13
Attitudes		1.00	0.44	-0.18	0.15	0.16
Drivers			1.00	0.00	0.15	0.21
Challenges				1.00	0.06	-0.01
Benefits					1.00	0.13
Impacts						1.00

Leaders

We have identified 65 organisations as leaders based on their high scores for "Actions" and "Attitudes". Visual Arts organisations are very well represented, while Music and Combined Arts seem to underperform.

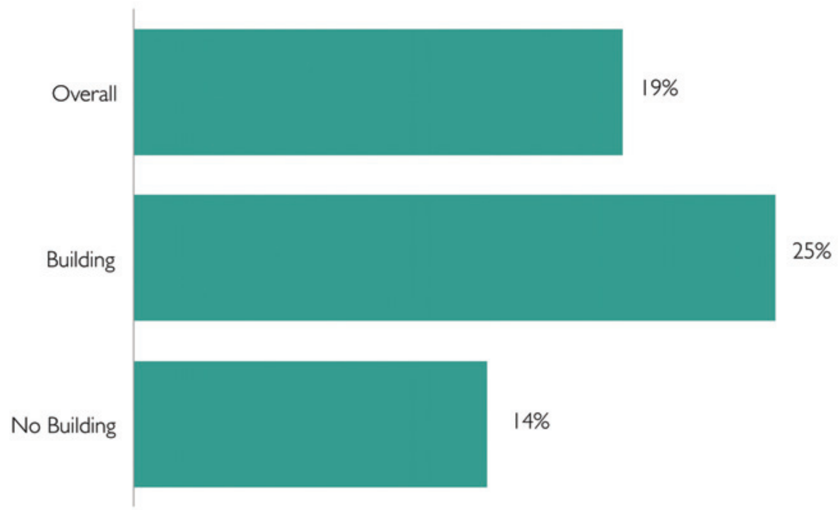
Leadership is defined as three or more examples of: ongoing environmental impact measurement, policy implementation, a range of operational actions, environmental auditing/certification, board/shareholder/owner commitment, commissioning, sustainable capital or refurbishment, renewable energy sourcing, communication with audiences/artists/contractors/funders and supporters, championing the green economy.

Percentage of organisations in each sub-sector identified as leaders.



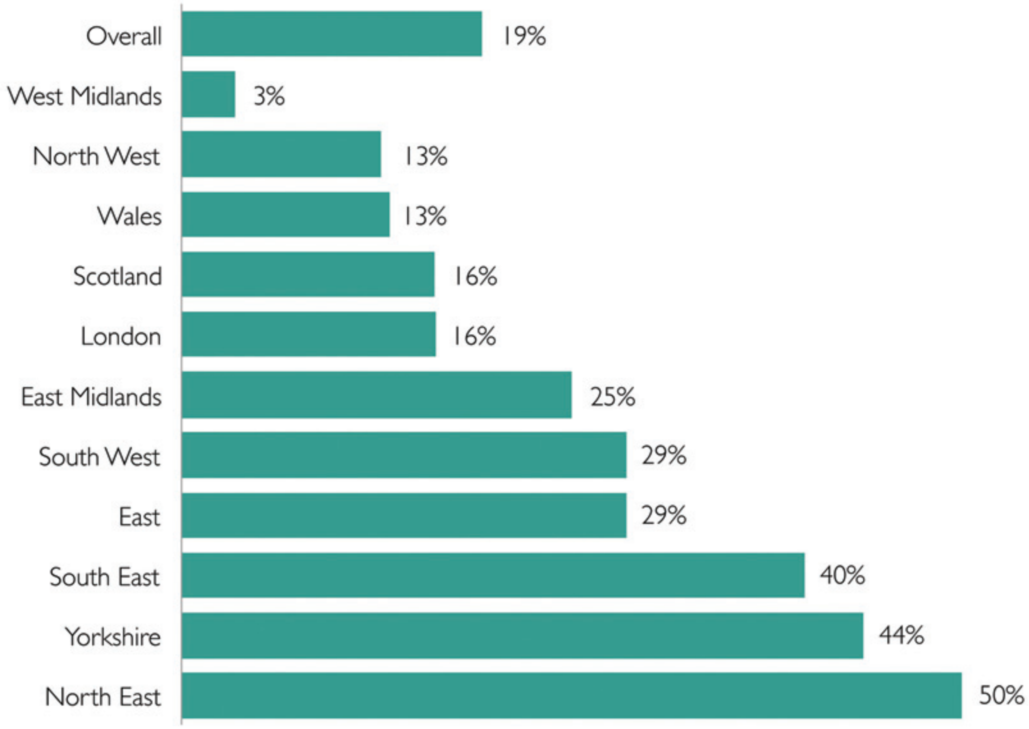
Building operators are more likely to be leaders.

Percentage of each type of organisation identified as leaders.



There is a high disparity between the leaders' locations. North East, Yorkshire and South East perform highly. West Midlands only has one Leader organisation.

Percentage of each type of organisation identified as leaders.



Julie's Bicycle

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