

# CREATIVE CLIMATE CENSUS

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

## EXECUTIVE SUMMARY

MARCH 2018

In partnership with



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# EXECUTIVE SUMMARY

The Creative Climate Census is the longest-running attempt to track the attitudes and behaviours of cultural decision-makers in response to climate change and environmental sustainability. The first survey, published as the **Sustaining Creativity Survey** in May 2014, captured almost **370 responses**.

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

## KEY FINDINGS

- More than four in five organisations (83%) have benefited from their environmental sustainability practice. Benefits range across financial, reputational and well-being indicators.
- Senior leadership is now driving action on environmental sustainability (whereas in 2014 initiatives were mainly being driven from the middle of organisations).
- The three top drivers are:
  - the commitment of staff or senior management;
  - reduced costs, and
  - compliance with regulations or funders.
- Audience demand is also a strong driver for organisations that do not receive public or grant subsidy.
- Climate change and environmental sustainability are creative catalysts, helping to animate new work, partnerships and cultural practice. **Three-quarters** of responding organisations are collaborating both within and beyond the sector.
- The sector does not always recognise or give itself credit for the incremental progress it is making.
- The scarcity of green suppliers and services able to match the quality and cost of 'conventional' suppliers and/or deliver to scale continues to limit environmental action. This is compounded by the complexity of assessing and comparing the sustainability credentials of different products and services.
- A lack of capacity and time remains, unsurprisingly, the highest cited challenge.

# EXECUTIVE SUMMARY

## RECOMMENDATIONS

from respondents to support the Creative Climate Movement

1

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

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2

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

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3

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

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4

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

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5

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

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

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

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

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

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*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!*

# METHODOLOGY & PROFILE OF RESPONSES

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

## RESPONDENTS

In the methodology, respondent profile, and results, please see the full

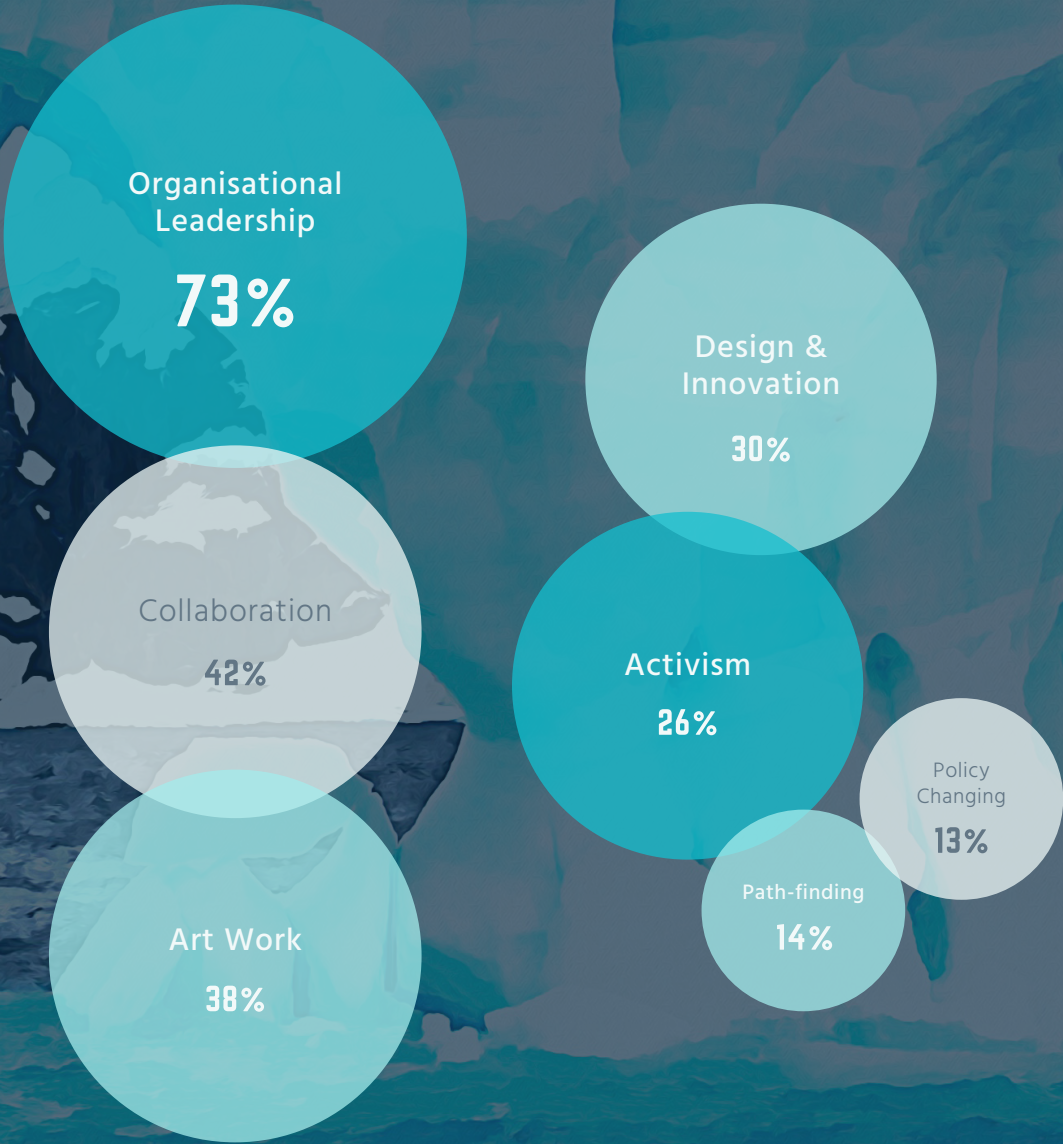
- We received 476 responses in 2017, compared to 370 in 2014.
- Responding organisations have a combined turnover of approximately £1.1 billion.
- Just over three-quarters (77%) of responding organisations report receiving some level of financial support from public funding.
- Most respondents are based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

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

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

# 7 TRENDS

Percentage respondents identifying with each of the Seven Creative Climate Trends



## READ THE FULL REPORT

The Creative Climate Census is a rich research document running to 100 pages. Julie's Bicycle have synthesized the findings into a shorter report and created key summaries for:

- Funders and Sector Development Agencies
- Creative Sectors (Combined Arts, Dance, Literature / Spoken Word, Museums & Heritage, Music, Theatre, Visual Arts)
- Innovation & Greening the Supply Chain

to help readers quickly find the information of most interest to them.

These, alongside the full report written by Social Value Lab for Julie's Bicycle, can be found [here](#).

## ACKNOWLEDGEMENTS

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

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

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

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## ABOUT JULIE'S BICYCLE

Julie's Bicycle is a London-based charity that supports the creative community to act on climate change and environmental sustainability. We believe that the creative community is uniquely placed to transform the conversation around climate change and translate it into action.

We provide the creative community with the skills to act, using their creativity to influence one another, audiences and the wider movement. We run a rich programme of events, free resources and public speaking engagements, which contribute to national and international climate change policy development.

Julie's Bicycle supports the Paris Agreement goal to limit global warming to well below two degrees Celsius by focusing on energy, the major source of carbon emissions for the cultural sector. More than 2,000 companies use the Creative IG Tools, our suite of carbon calculators, and our certification scheme, Creative Green, is the recognised benchmark for sustainability achievement within the creative industries.

We have a deep engagement with the arts and cultural sector, working with organisations and independent professionals across the UK and internationally to embed environmental sustainability into their operations, creative work and business practice.

[juliesbicycle.com](https://juliesbicycle.com)

