Creative Industries:

Sustainability Networks

Catherine French & Martin Charter

The Centre for Sustainable Design ®,

Business School for the Creative Industries, University for the Creative Arts

July 2024

Table of Contents

1. Introduction

This report is based on research into Networks related to Creative Industries (CIs) [1] and Sustainability; with 'Sustainability' referring to environmental Sustainability. Research was conducted between February - June 2024, and included desk research, interviews, and an online survey. The research was completed by The Centre for Sustainable Design ® (CfSD) at University for the Creative Arts (UCA) with funding from by The Games and Innovation Nexus (GAIN), a £2.3m programme led by the University of Surrey, the University for the Creative Arts, and the University of Warwick, and supported by £1.5m from the Connecting Capability Fund, Research England (CCF-RED).

The CI in the UK is defined by the DCMS [2] as having nine sub-sectors. However, there are also a range of supply chains that also feed into sub-sectors that are often not discussed (see Appendix I).

Desk research focused on CI in the UK and other countries, Sustainability, and climate change in CI, CI Networks, and specific 'Sustainability Network' related to CIs. As part of the research, Sustainability Initiatives were also identified that had different characteristics to Sustainability Networks (see box below).

Sustainability Networks	Sustainability Initiatives
Sustainability Networks are defined as processes that connect people in the CI through online and face-to-face events. *Sustainability Networks have Sustainability as a focus but might also alongside other topics.*	Sustainability Initiatives are defined as industry/sector led goals/pledges/ events that focus on Sustainability. Initiatives relate to businesses working together towards a goal.

Interviews were held with industry professionals from a range of different sub-sectors within the CI industries. The purpose of the interviewees was to determine current understanding of Sustainability in the CIs and assess that current Networks that exist. In addition, an online Survey was conducted to further understand issues related to Networks and Knowledge Exchange related to Sustainability within the CI.

2. Findings

Three research methods were used to complete the research: desk research, interviews, and an online survey. The key findings of the research are highlighted below.

---

[1] Creative Industries as defined by the DCMS Definition. Available at:
https://pec.ac.uk/news_entries/national-statistics-on-the-creative-industries/
[2] The nine sub-sectors within the CIs are Advertising and Marketing. Architecture. Crafts. Design and Designer Fashion. Film, TV, Video, Radio and Photography. IT, Software and Computer Services. Publishing. Museums, Galleries and Libraries. Music, Performing and Visual Arts.
https://pec.ac.uk/news_entries/national-statistics-on-the-creative-industries/

Desk research revealed few reports and other sources of information that explicitly covered Sustainability and/or climate change in the CIs as a sector. However, the research identified research focused on Sustainability and/or climate change in specific sub-sectors e.g. Architecture, Film and TV, etc. Where reports existed, the prime focus was on climate and related issues, rather than Sustainability as a whole. As a result, the reports that were found contained little discussion on cross-sector collaboration to address Sustainability issues across all the CIs. It appears that most collaboration is *within* sub-sectors and not *between* sub-sectors.

The desk research also identified CI Networks and Sustainability Networks within the CI. Interestingly, despite business-related collaboration happening *within* sub-sectors, a common theme that emerged was the perceived need for more collaboration *within* CI sub-sectors of, for example, reducing Scope 3[3] carbon emissions. However, there was little mention or evidence of collaboration on reducing Scope 3 carbon emissions *between* and across the CI.

As mentioned in the Introduction, a by-product of investigating Sustainability Networks was the identification of a separate category of Sustainability Initiatives which differed from Sustainability Networks. For example, *Publishing Declares,* (an Advertising Initiative) requests that individuals/organisations agree to progress 5 commitments by signing a pledge (*Take Action on the Climate, Protect Life on Land, Strengthen Partnership, Educate for Sustainability and Advocate for Sustainability*).

Interviews were completed with CI experts and practitioners to explore and identify issues related Sustainability in CIs, and their experience of Networks in the CIs. The interviews were held online between February and May 2024 with 11 people. Those interviewed were involved with and working in the CIs in a range of roles and sub-sectors (see Appendix II). A small number of pre-prepared questions were used in interviews, which were not revealed to the interviewees ahead of time. The interviews were, in effect, undertaken as semi-structured, informal discussions and this allowed for elaboration on thoughts and points that were expressed.

Finally, an online survey was completed in May 2024 with 59 respondents. The survey's aim was to expand on current research knowledge gaps related to Networks, Networking, and Knowledge Exchange related to the CIs overall, and specifically in relation to Sustainability. Five validated email lists and two social media channels (LinkedIn and WhatsApp) were used to reach participants.

The majority (49%) of respondents came via LinkedIn postings. One general CI mailing list produced 20% of the respondents (but two of the general CI mailing lists returned no participants and another 3%). The survey was shared with a large and active WhatsApp Sustainability Music and Events Network. It was assumed that this group would generate most engagements with this survey, but only 12% of the

---

[3] All indirect greenhouse gas emissions that are a consequence of the activities of a company/organization up and down its value chain' https://pec.ac.uk/wp-content/uploads/2023/12/PEC-Creative-Industries-and-the-Climate-Emergency-The-Path-to-Net-Zero-PEC-Research-Report.pdf

responses came from this source. This low level of responses was surprising considering the level of activity in this group. Limited time constraints resulted in a short survey period, possibly impacting respondent numbers.

It would have been desirable to include more WhatsApp groups linked to the CIs (and Sustainability), but these were difficult to locate, as there is no catalogue or searchable index for the platform.

The Survey also aimed to identify the Sustainability maturity of respondents using a method developed by The Centre for Sustainable Design ® (CfSD) at UCA. The results below show that the highest proportion of respondents were on an Intermediate maturity rating of Sustainability awareness and understanding (see Table 1 below).

Table 1 Respondent's Sustainability maturity rating

(Z- Zero, B-Basic, I- Intermediate, A- Advanced)

Maturity Rating (All Sub Sectors)			
Z	B	I	A
Percentage	10%	30%	35%	25%

2.1 Desk Research

The CIs comprise many MSMEs (micro, small and medium-sized) businesses.

"95% of creative companies were micro businesses (fewer than 10 employees) which is 6 percentage points more than in the rest of the economy".

Source: Creative PEC, 2022.

As mentioned in the introduction, the CIs are defined by DCMS as comprising the following sub-sectors:

- Advertising and Marketing
- Architecture
- Design and Designer Fashion
- Crafts
- Film, TV, Video, Radio, and Photography
- IT, Software Services and Computer Services. This also includes Gaming and Createch
- Museums, Galleries, and Libraries
- Music, Performing and Visual Arts
- Publishing

Few reports were discovered that focused on the Sustainability and/or climate change across the CI sector. A report by Julie's Bicycle and Policy and Evidence Centre (PEC) is one of the few reports that gives an overview of climate change covering the CI overall.

The *Creative Industries and the Climate Emergency: The Path to Net Zero (2022)* report was completed in 2019 and examined each sub-sector of the CIs. The report highlighted individual environmental issues, Initiatives, and recommendations related to each sub-sector. The report helped to underline the differences in each sub-sector's approach to climate change and Sustainability and recognised that each sub-sector handled the issues in its own way. Some sub-sectors were more advanced than others and had Initiatives and goals, whereas others were less developed, perhaps because they had lower environmental impact and/or few drivers for change. However, the report highlighted that the Sustainability activities in each sub-sector were generally inwardly focused *within* the sub-sector, missing opportunities for collaboration and learning across the CI as a whole.

As stated above, most reports were focused on Sustainability and climate in individual sub-sectors of CI. For example, *Playing for the Planet - Untangling the carbon complexities of the Gaming industry (Playing for the Planet, 2023), The New Screen Deal (Albert, 2020), Built for the Environment (RIBA, 2022), Creative Supply Chain Report (Mayor of London, 2019), The New Screen Deal- Transformation Plan for Wales (Albert et al., 2023).*

A few sub-sector specific reports recognised the need for a broader perspective on Sustainability. For example, *The New Screen Deal* drew attention to TV and Film productions and stated that "productions have changes to make across the production life cycle" (The New Screen Deal, 2020). The report also highlighted that Sustainability impacts covered all aspects of the production life cycle, from pre-production to production and post-production.

Despite being divided into nine sub-sectors, the CI has an intertwined impact on each other, with various crossovers in activities, production, and content development. For example, Fashion Designers collaborate with Music and Film industries to create costumes for performances, shows, films, etc. Another example are composers who may produce, create and produce their own music, but also may work with the TV and advertising sub-sectors. This illustrates that while there are crossovers between the sub-sectors in business or creative practice areas, there appears to be little crossover in Sustainability practice between sub-sectors.

As highlighted above, some reports highlight the importance of Scope 3 carbon emissions in relation to common supply chains (see Appendix I). The *Screen New Deal* report mentioned that "resource consumption and associated carbon emissions are under-reported by productions, and in some cases not reported at all" (The Screen New Deal, 2020). The report recognised that supply chains impact the Sustainability performance of the Film sub-sector and there is a need to improve Scope 3 carbon measurement and reporting throughout the lifecycle. A study was

found on Supply Chains in the CI, the *Creative Supply Chain Study (2019)*, however, this did not address Sustainability or climate impacts.

2.1.1 Networks and Initiatives

The authors of this report define Networks as *processes that connect people in the Creative Industries (CI) through online and face-to-face events*. As of 20th June 2024, 247 general CIs Networks have been identified globally. It is important to treat the number as indicative rather than definitive due to the limited timescale of the research. The overall list was then filtered to create a list comprising Networks that had Sustainability as one of their key priorities and these Networks were labelled Sustainability Networks.

Out of the 247 Networks identified, 74 Networks had some element of Sustainability focus and were defined as Sustainability Network (see definition in Introduction). Of the 74, 24 (32%) were general Sustainability Networks, e.g. non-sub-sector specific and 50 were sub-sector specific (68%). The general Sustainability Network typically comprised government organised schemes that had a specific mission. For example, UNESCO leads the Creative Cities Network, which focuses on cities rather than businesses e.g. MSMEs. The sub-sectors most represented in the 50 Sustainability Network were in Architecture, Film and TV and Software, IT and Createch, etc.

There is an uneven distribution of Sustainability Networks per CI sub-sector (see Table 2). The Architecture sub-sector has the highest number, with 10 Networks solely dedicated to Sustainability. Regulatory and other environmental drivers in the sub-sector possibly contribute to Architecture being well covered. The sub-sector with the lowest number of Networks was the Crafts with no Sustainable Networks identified. Small communities exist in Crafts, but their primary purpose relates to marketplaces/trading, therefore it did not fit with the definition of Network that this research used. There may be group-based Networks on WhatsApp, for example, but these could not be identified.

There were also sub-sectors within the DCMS definition, which contained more granular sub-sectors. The *Design and Designer Fashion* sub-sector (as defined by the DCMS definition) are generally combined as one sub-sector, but the Network analysis broke this down further into smaller sub-sectors (Networks for Design and Networks for Designer Fashion). Using this example, the Design and Designer Fashion sub-sector represents 8 out of the 74 Sustainability Network, with Design representing 3 Networks and Fashion representing 5 Networks. It is possible that some Sustainability Network held events which brought together both sub-sectors, but as Networks, they operate separately. This reinforces that even within sub-sectors, the communities rarely appear to interact.
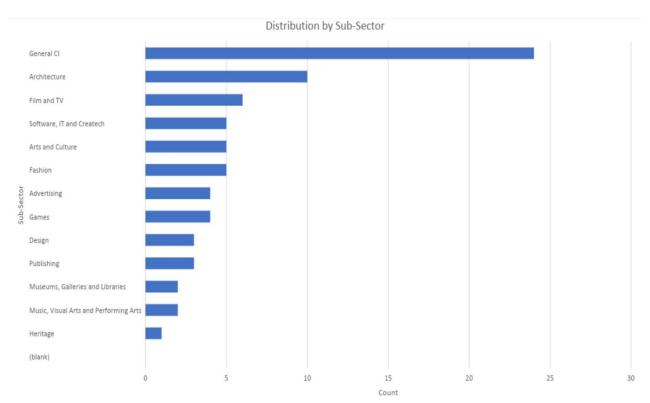
7

Table 2: Distribution of Sustainability Networks organised by the sub-sector

Distribution by Sub-Sector

Further examination of the research identified the existence of Sustainability Initiatives that exist alongside the Sustainability Networks. The level and extent to which there is engagement between Sustainability Networks and Initiatives is unclear and further research is needed (although some Initiatives are clearly started by a Network). Like Networks, Sustainability Initiatives exist primarily within specific sub-sectors of the CI.

As of 20th June 2024, 39 Sustainability Initiatives have been identified that align with different sub-sectors of CIs. This number should be taken as indicative rather than definitive, due to the slightly porous definition. 11 of the Sustainability Initiatives require membership, but the majority are free, only requiring an electronic signature of support or a pledge. Only a few Initiatives displayed a list of the organisations/ people who have signed their commitments or pledges. Initiatives are less likely than Networks to hold regular events, but when they do, it is often through a partner or a connected Network. For example, *Global Fashion Agenda* (one of the 74 Sustainability Networks) holds events related to its Initiative, *The Circular Fashion Partnership (one of the 39 Sustainability Initiatives)*.

As with Sustainability Networks, the Architecture sub-sector has the highest number of Sustainability Initiatives with 6, with Design having the lowest number with only 1 Initiative identified (See Table 3 below). Only two generic Initiatives were identified - CENDANA (Cultural Economy Development Agency)[4] and The Creative Industries Pact for Sustainable Action[5] - with 37 focused on sub-sectors.

---

[4]Cultural Economy Development Agency https://www.cendana.com.my/
[5] The Creative Industries Pact for Sustainable Action https://creativeindustriespact.com/
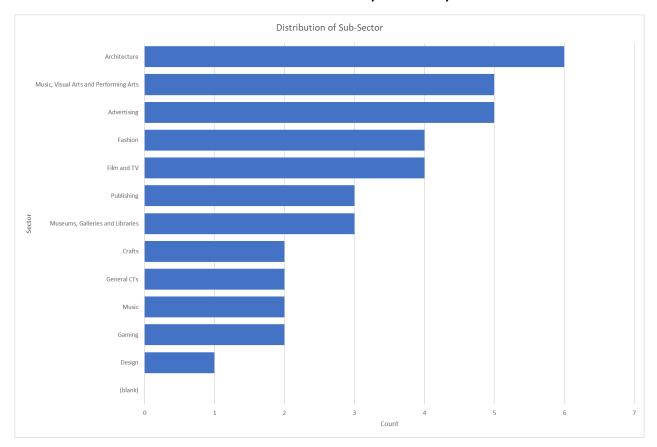
Table 3: Distribution of Sustainability Initiatives by sub-sector

Distribution of Sub-Sector

Sector	Count
Architecture	6
Music, Visual Arts and Performing Arts	5
Advertising	5
Fashion	4
Film and TV	4
Publishing	3
Museums, Galleries and Libraries	3
Crafts	2
General CI's	2
Music	2
Gaming	2
Design	1
(blank)	0

The distribution of Sustainability Initiatives by sub-sector highlights the tendency of those sub-sectors to operate *within* themselves, similar to the Sustainability Networks.

When viewing the content delivery styles of Sustainability Networks and Sustainability Initiatives, it was highlighted that workshops and webinars were the most common, with 48 of the 74 Sustainable Networks and 13 of the 39 Sustainability Initiatives offering workshops and webinars.

It was noted by one interviewee, an event organiser, that they had seen a drop in interest in the webinars. The COVID-19 pandemic drove all Networking and events to online calls and meetings, but there are indications that there is a growing desire to move back to physical events (but to have hybrid options). This was confirmed by another interviewee from the Music sub-sector, who reinforced that people were missing in-person interactions. This was further underlined by survey respondents when asked to rank Networking approaches based on perceived effectiveness, with the most preferred approach being traditional Networking, with "online Networking" being the third (see Table 4 below).

LinkedIn was the most utilised social media platform being used by 57 out of 74 Sustainability Networks. However, initial desk research indicated that the engagement with the posts was generally low on LinkedIn Groups, and that they were primarily used to promote events, etc. Therefore, LinkedIn appears to be primarily acting as a marketing tool rather than a discussion platform. Interestingly,

9

when respondents in the online Survey were asked "How effective do you see various technologies in Networking, Zoom received the highest ranking, followed by WhatsApp and then LinkedIn" (see Table 5), .

Table 4: Networking approaches based on effectiveness

Please rank the following networking approach based on your understanding of their effectiveness?

Further research is needed to identify the platforms used by the Networks. This is because you can only determine the platforms used by Networks if you become a member or know someone who is a member, as they are not publicised and, in most cases, cannot be searched for online.

Although the highest number of respondents accessed the online survey via LinkedIn (49%), this did not mean that they ranked LinkedIn groups as being particularly effective. If we examine those that responded via LinkedIn, 35% rated LinkedIn groups as very effective or extremely effective. However, these respondents ranked Zoom and other videoconferencing technologies as more effective (where 65% selected very effective or extremely effective). For comparison, using all the data, the results were 40% for LinkedIn Groups and 59% for Zoom on effectiveness. So, respondents via LinkedIn rated LinkedIn groups lower than other respondents. However, some caution is needed in interpreting this finding. It may mean that their experience of LinkedIn groups as a technology platform is rated lower, or it could reflect a lack of satisfaction with the communities and Networking on the LinkedIn platform.

10

Although, YouTube was not an option on the Survey, the desk research revealed that 40 of the Networks and Initiatives use YouTube as the primary platform to upload recorded events, ensuring that people can access the information and discussion after the events have taken place (and lowering barriers to participation).

Table 5: Effectiveness of various technologies used for Networking

How effective do you find various technologies used for networking?

In summary, the research highlighted two collective groupings related to Sustainability in the CI: Networks and Initiatives.

- Networks
    - Sustainability Networks are focused on sub-sectors of the CI focused (50 out of the 74 Sustainability Networks) e.g. Conscious Advertising Network.
    - Cross-sector CI Sustainability Networks are funded/operated by government and may not focus on businesses (24 out of the 74 Sustainability Network) e.g. Creative Cities Network, run by UNESCO, focuses on cities rather than businesses and does not specifically target MSMEs.
- Initiatives
    - Initiatives are divided into three Initiative categories: Signatory Initiatives; Membership Initiatives; and Other Initiatives
        - Signatory initiatives are where individuals/employees/ organisations/businesses sign up to commitments in relation to Sustainability. These represent 13 out of 39 Sustainability Initiatives e.g. Architects Declare UK and UN's Fashion Charter for Climate Action.
        - Membership Initiatives are individuals/employees/ organisations/businesses either pay or have free membership in the Initiative. These represent 11 out of 39

Sustainability Initiatives e.g. Playing for the Planet and GamesForestClub.

2.2 Interviews

11 expert interviews (see Appendix II) were held online with CI professionals from Advertising (1), Music (3), Visual Arts (1), Fashion (1), Film and TV (1), Sustainability (3) and events (1).
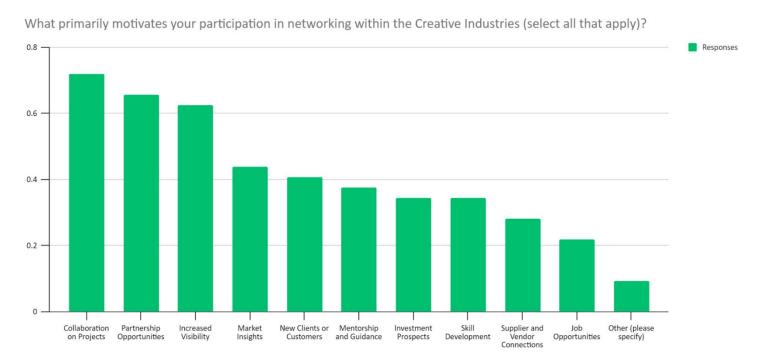
All interviewees had made Sustainability a priority in their businesses and were interested in Sustainability focused Networking in the CIs.

Below are the key findings from the interviews.

2.2.1 Making connections

Three interviewees mentioned interest in a type of 'matchmaking' as a mechanism for connecting with other professionals from diverse fields. Individuals in the CIs often come from creative backgrounds but lack expertise in business, e.g. one interviewee, running a small business in the Fashion sub-sector, found connecting with professionals in law and finance helpful as these areas were outside of existing knowledge and expertise. The interviews tended to focus on interviewees with more advanced Sustainability awareness/understanding.

Table 6: Motivations for participation in Networking in the CIs

What primarily motivates your participation in networking within the Creative Industries (select all that apply)?

Connecting the businesses that were new to Sustainability (Z/Bs) to Sustainability experts (I/A) in the CIs could lead to more information sharing. However, the most advanced interviewees were more interested in Knowledge Exchange with other

advanced practitioners. In addition, when asked in the online Survey, "What would encourage you to participate more actively in Networking events?", the responses related to gaining access to 'Mentoring and Guidance' was lower in Z/Bs than the I/As (but note that only 12 respondents answered this question). In the Survey, overall, respondents ranked "Collaboration on projects" as the biggest motivator, followed by "Partnership opportunities (see Table 6 above). As highlighted above, this is likely to be collaboration and partnership *within* existing sub-sectors and not *between* sub-sectors.

2.2.2. Informality

Two interviewees mentioned a preference for more relaxed Network spaces for discussion. An informal atmosphere was felt to allow individuals to discuss topics more openly, share knowledge, foster trust and potentially lead to collaborations. This was further supported by the online Survey, when asked about improving future Networking events in the CIs, the common response was 'Small and focused groups': smaller groups can lead to deeper connections and engagement.

2.2.3. Education

An interviewee - who works in the Advertising sub-sector - expressed the need for education tools for MSME's and others that are new to Sustainability in the CIs but who want to incorporate considerations into their businesses.

"There isn't the need for inventing anything new. It's all out there. It's just about discovering it".

There are a range of tools that are available, but they are usually sub-sector specific. For example, the Film and TV sub-sector has the Albert toolkit (Albert, 2021), a Carbon Calculator and Carbon Action Plan. However, if a CI business is new to Sustainability, they are likely to lack understanding of where to start or what to do first, therefore there is a need for more Knowledge Exchange on these topics especially for those who are 'starters' and/or at (Z)ero to (B)asic on the ZBIA Sustainability Maturity.

This above aligns with the online survey. The survey respondents were asked in an open-ended question, "In your opinion, what types of resources and support are lacking, but necessary, to make Networking more effective for Sustainability in the Creative Industries?". The main responses were "High-quality, free-to attend events and resources", "More accessible and inclusive Networking opportunities, especially for freelancers and other micro businesses", "Cross Creative Industries platforms, Networking, and events", "More definitive support and guidance on Sustainability from membership organisations and government bodies" and finally "More blended opportunities combining online and in-person gatherings...but focus must be towards action orientated Networking". Respondents that want to access educational tools may also need guidance on where and how to access the tools. However, the answers to this question did not draw on the maturity of the

respondents. This could also mean that the respondents are again highlighting the interest in better collaboration and identification of collaboration opportunities in the CIs.

2.2.4 Content

Besides making connections and Networking within Networks, events need to consider Sustainability content that resonates with companies within the CI overall and/or sub-sectors. This might be more policy driven for some sub-sectors, e.g. Fashion and Architecture, and even Advertising, or more topic-driven in others. Perhaps, three areas that may be common to the CI overall and specific-sub-sectors are 3C's: *carbon* (decarbonisation, carbon accounting, and reporting), *communications* (e.g. greenwashing and greenhushing) and *collaboration* (e.g. based mechanisms to establish effective collaborations and partnerships).

Carbon: There are numerous methodologies for measuring environmental impact in the CIs and wider. In the CIs, numerous carbon calculators have been identified and for many MSMEs, it will be difficult to identify and determine *the* tool that is most appropriate for their business[6]. In addition, there are lack of standards related to carbon accounting and reporting generally and specifically in the CIs and the sub-sectors, and there are differences by country. This highlights that there may be confusion when trading with other countries, without common agreement on terminology and methodologies. The report, *Playing for the Planet- Untangling the carbon complexities of the Gaming industry,* also drew attention to the different measurements in different countries and regions. "The region of use will also have a significant effect on carbon impact results due to variation in carbon emission intensity of electricity from region to region" (Playing for the Planet, 2023).

Communications: As Sustainability is becoming a more prominent topic for businesses in the CI and how you communicate on the topic is becoming more important. Policy is tightening in the EC on how to communicate Sustainability messages. The term "Greenwashing[7]" is increasingly being used to highlight businesses that are making false claims in relation into product and/or service Sustainability performance. The CI is not immune to these issues. For example, Greenpeace stated in an article that "A recent screening of Sustainability claims in the textile, garment and shoe sub-sector suggested that 39% could be false or deceptive." (Greenpeace, 2023). As a result of increasing concerns over inadvertent greenwashing, some companies are deciding not to communicate environmental

---

[6] See Charter and Davis, Createch in the UK: Sustainability Policy Linkages and Company Activity, July 2022 (https://cfsd.org.uk/wp-content/uploads/2022/07/CT_Published_July-2022.pdf) and the 'Carbon calculation and management' section of the CfSD Sustainability Maturity Tool (https://bit.ly/cfsd).

[7] Cambridge dictionary defines greenwashing as "behaviour or activities that make people believe that a company is doing more to protect the environment than it really is." https://dictionary.cambridge.org/dictionary/english/greenwashing

benefits for fear of external pressures and scrutiny. This response is being termed "Greenhushing[8]".

Collaboration: Collaboration is an area of interest that is repeated consistently amongst interviewees and throughout the survey. However, Collaboration appears to be divided into areas by respondents: *business collaboration* with potential partners and business contacts; or *knowledge collaboration* with professionals in relation to knowledge transfer on Sustainability. Overall levels of satisfaction related to Collaboration are rated low amongst survey respondents. However, individuals and companies within the CIs are at different stages of sustainability awareness/ understanding and will have different priorities in relation to Collaboration. For example, one interviewee who was an Advanced maturity rating, highlighted an interest in continuing to accelerate Sustainability learning.

2.3 Survey

This section will look in more detail at the responses provided by the 59 respondents to the online survey that was completed during May 2024. As previously mentioned, the highest response percentage was generated via LinkedIn at 49% (see Table 7 below).

Most respondents were from Founders/Owners (29%) with 78% of Founder/Owners stating their business size as 2-10 employees e.g. MSMEs. Fewer than 5% of the total selected Freelancer, Policy Maker, or Artist as their role. However, 27% of respondents identified themselves as Academics or Consultants, which was not the original target audience. The prime intent of the survey was to reach MSME business owners who, it was perceived, may not have high levels of Sustainability awareness/understanding. However, access to relevant lists and groups of MSMEs in the CI was limited and the lists that were more business focused appear to have provided low response rates. The inclusion of results from the academics and consultants - with higher levels of awareness and understanding of Sustainability - may have diluted the contribution of responses from MSMEs that have Zero/Basic Sustainability awareness/understanding.

---

[8] Greenhushing is "a term for the growing number of firms who are unwilling to publicise their net zero targets" https://www.greenintelligence.org.uk/insights/what-is-green-hushing-and-how-do-i-avoid-it/
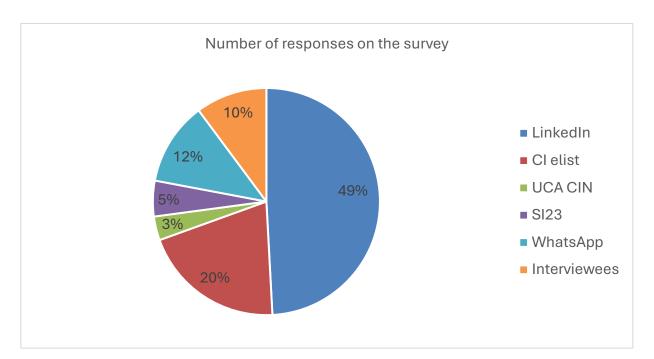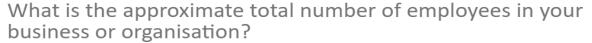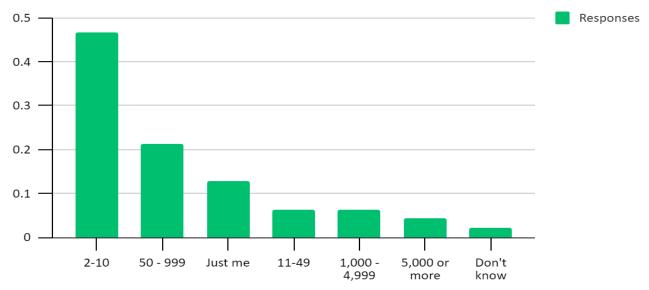
Table 7: Source of responses to the Survey

Number of responses on the survey

Geographically, over half of the respondents were from the UK (59.57%). However, there were also responses from other parts of Europe, including Germany, Belgium and France. There were also responses from the USA (6.38%) and Australia (2.13%).

When asked about the "Approximate total number of employees in your business or organisation," the highest response was "2-10" at over 45% (see Table 8 below), with the majority of those responses coming from founders. In slight contradiction to the statement about 'dilution' above, 36% of respondents from MSMEs and smaller organisations were rated as having Intermediate/Advanced Sustainability awareness/understanding.
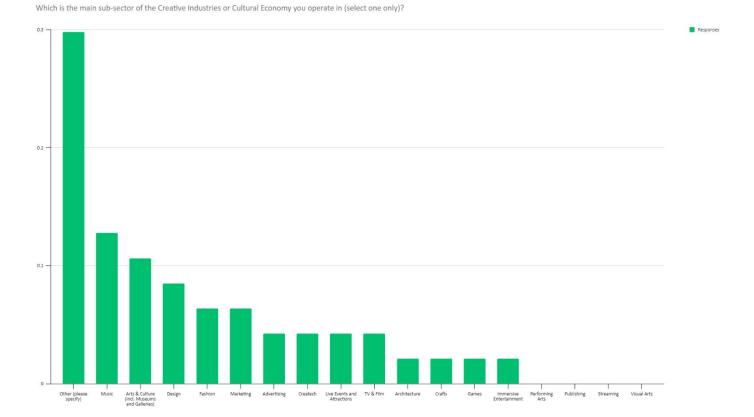
Table 8: Number of employees in businesses or organisations

What is the approximate total number of employees in your business or organisation?

As highlighted below in Table 9, the highest number of responses BY SUB-SECTOR were from those that identified themselves as "Other" (14 responses). Music was the highest individual sub-sector, represented by 6 responses. Although Architecture was the sub-sector with the highest number of Sustainability Networks and Initiatives, the survey only had one respondent from that sub-sector. The relatively high number of respondents from Music may have come from a WhatsApp group with strengths in Music and Events, and the lack of respondents from Architecture being due to a lack of targeting of that sub-sector.

Table 9: Responses by sub-sector of the CIs

Which is the main sub-sector of the Creative Industries or Cultural Economy you operate in (select one only)?
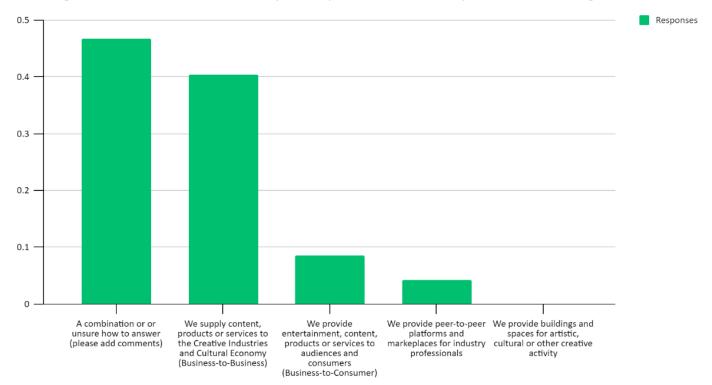

When asked about the position of the respondent in the value chain, the highest number of responses related to "A combination or unsure how to answer". This could mean that the respondents may not understand where they are positioned in the value chain or may have not understood the question. However, there appeared to have been some responses from businesses and/or organisations in the CI supply chains, e.g. the second highest organisation type appears to be from those from the supply chain (see Table 10 below).

The research also sought to discover the current engagement in Networking/ Networking events. Most respondents were a part of a Network in the CI (70%), but not necessarily a Sustainability Network (see Table 11 below). The survey did not specifically ask about membership of Sustainability Networks in the CIs and therefore, it's unclear how many respondents are part of Sustainability Networks in the CIs.

Table 10: Position in the *value chain*

Thinking of the end-to-end value chain you are part of, where does your business or organisation sit?
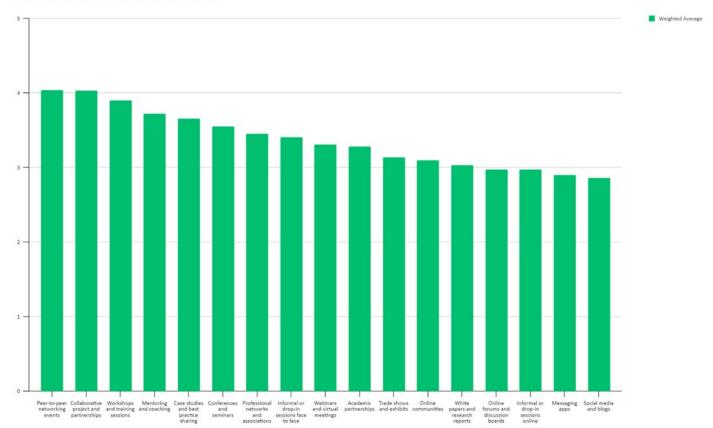

One interviewee mentioned that making better "connections" could help to bridge the gap between the CIs and supply chain stakeholders. The interviewee noted that some manufacturers don't identify themselves as part of the CIs but view themselves as suppliers to it. This emphasises the potential to encourage actors in CI Supply Chains to see Sustainability and Scope 3 carbon emissions as 'common issues' to work on together, helping to bridge gaps in awareness and knowledge at a sub-sector level and/or across the CI.

The most effective content styles of delivery were highlighted as "Peer-to-peer", "Collaborative projects and partnerships" and "Workshops and training sessions". (See Table 11 Below). This emphasises that, overall, respondents have a strong inclination towards direct and reciprocal information sharing, followed by workshops, being the most effective means of enhancing Knowledge Exchange, which could be due to their more interactive and engaging format.

Table 11: Ranked responses on the most effective delivery style of Networking events

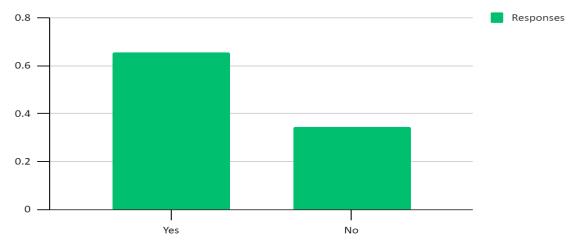How effective do you consider each of the following?

Most of the respondents claimed that they were members of Networks in the CIs and that they would pay for membership of a Network, however, 27 of respondents skipped this question.(See Table 12). However, the respondents that are willing to pay for memberships might be more likely from larger organisations and those more advanced Sustainability awareness/understanding that appear to be more satisfied with networking overall.
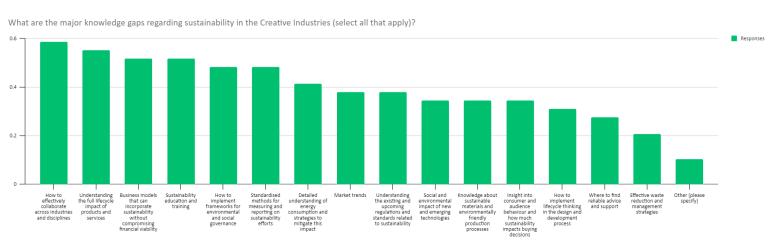
Table 12: Willingness to pay to be a part of a Network

Would you consider paying to be a member of a new network for the Creative Industries?

As seen in Table 13 below, the respondents highlighted that the biggest knowledge gaps in relation to Sustainability were "How to effectively collaborate across industries and disciplines" as followed by "Understanding the full lifecycle impact of products and services" and "Business models that can incorporate Sustainability without compromising financial visibility". This indicates that Networks should consider delivering events and other Knowledge Exchange activities related to Sustainability that cover Collaboration, Lifecycle impacts and Business models. An issue that perhaps needs further consideration is the differences between the subjects e.g. Collaboration is more about setting up processes, whereas Lifecycle impacts and Business models are more topic focused.

Table 13: Major knowledge gaps regarding Sustainability in the CIs

Respondents were also asked about improvements in Knowledge Exchange in the CI. In the responses to open-ended questions, common themes that emerged were:

- **Community Building and Collaborative Action**: Develop regular events that foster collaboration over competition (where relevant and feasible) and address concerns intellectual property.

- **Transformational Partnerships and Strategic Action:** Build Networks that host communities of practice focused on action, creating transformational partnerships and incorporating hard science into strategies.

- **Localised Knowledge Exchange and Inclusivity:** Recognising the importance of hyper-local spaces for Knowledge Exchange, accessing increased funding for Sustainability activities and making events more inclusive for MSMEs.

- **Professional Connections:** Creating dedicated working groups and making it easier for professionals to connect with relevant groups.

Finally, the survey asked about further insights into Sustainability Knowledge Exchange in the CIs. The survey asked, "Thinking of the CIs, what Sustainability knowledge exchange practices have you encountered that could be replicated or scaled within the CIs?". The most common responses were:

- **Adapt Frameworks**
  - Tailor frameworks from other sectors to specific niches within the CIs to provide structure and direction.
- **Large Scale Industry Gatherings**
  - Organise regular industry conferences, workshops and exhibitions that facilitate Networking and Collaboration.
- **Themed Discussions and Roundtables**
  - Organise themed discussions and roundtables with professionals from various sectors to share best practices and explore new ideas e.g. law, finance, etc.
- **Learn from Competitive Collaboration**
  - Study successful models of competitive collaboration (e.g. renewable energy) to improve communication and joint efforts on Sustainability within the CI.
- **Collaboration with Professional and Trade Bodies in Other Industries:**
  - Collaboration with other bodies might be useful around specific areas where there are potential mutual benefits e.g. Createch and computing. Lessons should be learnt from other cross-sector collaborations. However, cultural fit and lack of common language may barriers in the short-term.

3. Issues related to Networks/Networking

This section will explore the findings related to Networks/Networking in relation to Sustainability in CIs. There are four key themes that have emerged from the interviews and the online Survey: Scope; Reach and Timing; Box-Ticking; and Events.

3.1 Scope

There are a significant number of CI Networks that have been identified with approximately 30% providing Sustainability content alongside other topics. There are few generic Sustainable Networks focused on CI and none of these are focused on MSMEs. Most Sustainability Networks in CI are focused on specific sub-sectors. This indicates that there is little Networking and Knowledge Exchange *between* the sub-sectors of CIs, and particularly amongst MSMEs. In addition, Sustainability Initiatives in CI have been identified in some sub-sectors that are focused on specific awareness raising/actions through the signing of pledges/commitments. Some Sustainability Initiatives highlight a list of organisations/people who have signed up to the pledges/commitments, but it is difficult to identify to what extent these Initiatives are driving action or impact or are just awareness-raising exercises.

A respondent in the expert interviewees - an MSME business owner in the Digital and Visual Arts Sub-sector - stressed the importance of understanding a Network's scope and focus before committing time to attending events/activities. This aligns with that online Survey finding that "Insufficient time" was the biggest barrier to attending Networking events. Respondents emphasised the importance of their time being used productively.
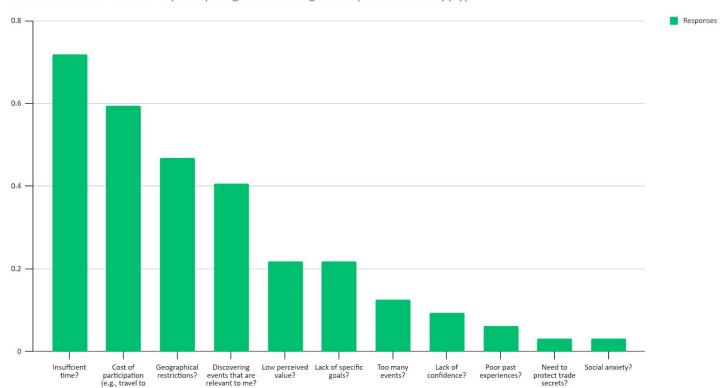
3.2 Reach and Timing

Table 14 below highlights four key barriers to attending Networking events: insufficient time (as highlighted above); cost of participation (including travel to events); geographical constraints; and relevance of events. The importance of physical proximity of events was stressed by respondents to survey when asked "What would encourage you to engage more in Networking events?". The most common responses were: Local and Accessible Networking. Respondents appeared to be attracted to local events in convenient locations at pleasant venues. Therefore, respondents appear to be attracted to more convenient and accessible Networking opportunities. This suggests that Networks need to consider the geographical barriers that Network members may face. This is where the use YouTube to provide event or webinar recordings may be useful alongside some events and webinars. This is already widely used and was mentioned by 40 of the Sustainability Networks.

3.3 Box-ticking

Three of the interviewees highlighted that there was a divide between those who want to engage in Sustainability Networks to learn about how to make their businesses more sustainable and those that just attend events or webinars just to 'box-tick' or greenwash. As discussed earlier in the report, the term 'greenwashing' is

being used more often in the CI. Some may be signing up to Networks and Initiatives to try and signify they are acting Sustainably but, in some cases, maybe not e.g. they trying to assign some credibility by signing pledges, commitments, etc but may not be acting on them. Some of the interviewees expressed that some attendees are just attending events and webinars as a 'box-ticking' exercise and this make discussions much less useful for those who are trying to increase or accelerate their sustainability awareness/understanding.

Table 14: Main barriers to participating in Networking events

What are the main barriers to participating in networking events (select all that apply)?

3.4 Events

One interviewee (who works in an event organisation in the CI) indicated that post pandemic many attendees had become tired of webinars. This and experience from related projects being organised by CfSD, indicates that there is perhaps a reduction in attendance at webinar-based Networking events. The interviewee stated, "The feedback and resonance were not there. People really did not want to do it anymore." The same interviewee highlighted the issue of trust, "It's very hard to build trust in the digital realm…I think it's really vital to meet in a room…and that really builds trust". Some people may not fully engage in or hesitate to join webinars due to a lack information about those who are present at the meeting e.g. might include competitors, and concerns over how responses and recordings will be used. Another interviewee added that in-person events, unlike webinars, can create more

24

relaxed environments and can help establish rapport easier and quicker. Earlier in the report, Table 4 highlighted that traditional Networking/in-person Networking was ranked the highest preferred Networking style – which aligned with the interviews - with "Online Networking" being 3rd and "Business Seminars and Workshops", 4th. However, there is still interest in workshops and webinars. Research indicated that events are still seen to be effective and are most common delivery style for Sustainability Networks. Post-pandemic there may be a growing recognition that webinars can be time-effective with lower travel and can be useful for providing information, but real relationship building comes from physical events where individuals can observe behaviour and language being used by other participants. Therefore, a balance between the two formats, physical and video, should be considered.

4. Conclusions

This research explored the current understanding and status of Networking and Knowledge Exchange related to Sustainability in the CI. Little desk research was found that explored climate change and sustainability across the CIs, with reports primarily focused on sub-sectors of the CIs. A significant number of Networks were identified in the CI with approximately one third covering Sustainability in some form. In addition, Sustainability Initiatives were discovered that focused on pledges and commitments. 74 Sustainability Networks and 39 Sustainability Initiatives were identified. Current Sustainability Networks were primarily focused on sub-sectors of the CIs with few being broad-based. In most instances it was unclear about the relationships between Sustainability Networks and Sustainability Initiatives. In addition, the desk research also highlighted little research related to the Sustainability and the Supply Chains related to the CIs.

The 74 Sustainability Networks were divided into two categories: General (24) - primarily linked to government related bodies; and Vertical (50) – focused on the vertical sub-sectors. Similarly, the 39 Sustainability Initiatives also divided into two categories: General CI (2); and Vertical (37) – focused on the vertical sub-sectors. However, Sustainability Initiatives can be further sub-divided into three categories: Signatory-based (13); Membership-based (11); and Others (15). Several sub-sectors already recognise the importance of Sustainability and there appears to be collaboration and Knowledge Exchange activities *within* the sub-sectors. However, there appears to be very limited Sustainability activities *across* CI as a whole and little collaboration on Sustainability issues *across* the sub-sectors of the industry.

The interviews and the survey indicate a lack of satisfaction with existing Networking and Knowledge Exchange mechanisms related to Sustainability in the CI. Survey respondents expressed a desire for enhanced Collaboration, particularly through more regular, targeted events such as themed discussions and workshops focused on specific topics. The interviews and survey highlighted differences between those with low awareness/understanding (Z/B's) and those with more advanced awareness/understanding (I/A's) of Sustainability. There were indications from the interviews and the survey that Z/B's perhaps required basic, entry level information

on Sustainability e.g. where to start. From the interviews it was clear, that the I/A's desired growth and mutual learning related to Sustainability through smaller groups of like-minded individuals.

Survey participants also indicated an interest in Networking opportunities, emphasising the importance of the event's quality. However, challenges lie in delivering Networking experiences that meet the diverse needs of the sector, and different levels of Sustainability awareness/understanding. Time constraints, particularly for MSMEs and geographical barriers were significant obstacles to participation, with many still preferring traditional, in-person formats particularly after CV19. While online Networking, especially through platforms like Zoom, is still popular, it has been recognised that online formats cannot replicate the trust and Collaboration building potential achieved through face-to-face interactions.

Overall, the research indicates a demand for improved Collaboration and Knowledge Exchange on Sustainability within the CIs. Future research should focus on identifying the most effective methods to facilitate Collaboration and Knowledge Exchange, considering the different levels of Sustainability awareness/understanding and the unique needs of different sub-sectors and Supply chains.

References

Abelvik-Lawson, H. (2023). Fashion greenwash: how companies are hiding the true environmental costs of fast fashion. [online] Greenpeace UK. Available at: https://www.greenpeace.org.uk/news/fashion-greenwash-report-companies-hiding-true-environmental-costs-fast-fashion/

albert. (2020). Screen New Deal. [online] Available at: https://wearealbert.org/2020/07/22/screen-new-deal/

albert. (n.d.). Production Tools. [online] Available at: https://wearealbert.org/production-handbook/production-tools/.

Cambridge Dictionary (2019). GREENWASHING. [online] Cambridge.org. Available at: https://dictionary.cambridge.org/dictionary/english/greenwashing

Creative Industries and the Climate Emergency The path to Net Zero Commissioned by. (2022). Available at: https://pec.ac.uk/wp-content/uploads/2023/12/PEC-Creative-Industries-and-the-Climate-Emergency-The-Path-to-Net-Zero-PEC-Research-Report.pdf

Creative Industries Policy and Evidence Centre (2022). National Statistics on the Creative Industries. [online] Creative Industries Policy and Evidence Centre. Available at: https://pec.ac.uk/news_entries/national-statistics-on-the-creative-industries/

Creative Supply Chains Study. (2019). (Online) Available at: https://www.london.gov.uk/sites/default/files/creative_supply_chains_study_final_191011.pdf

De Pascale, A., Arbolino, R., Szopik-Depczyńska, K., Limosani, M., & Ioppolo, G. (2021). A systematic review for measuring circular economy: The 61 indicators. Journal of Cleaner Production, 281. (Online). Available at: https://onlinelibrary.wiley.com/doi/full/10.1002/sd.2925

Defining the creative industries. (n.d.). Available at: https://static.a-n.co.uk/wp-content/uploads/2016/09/Creative_Industries_Chapter4.pdf

European Commission (2003). SME definition. [online] European Commission. Available at: https://single-market-economy.ec.europa.eu/smes/sme-definition_en

Green Intelligence. (n.d.). Green Intelligence | What is green hushing and how do I avoid it? [online] Available at: https://www.greenintelligence.org.uk/insights/what-is-green-hushing-and-how-do-i-avoid-it/

Kishan (2023). The Screen New Deal Transformation Plan for Wales - Setting a Path to Net Zero. [online] albert. Available at: https://wearealbert.org/2023/11/21/the-screen-new-deal-transformation-plan-for-wales-setting-a-path-to-net-zero/
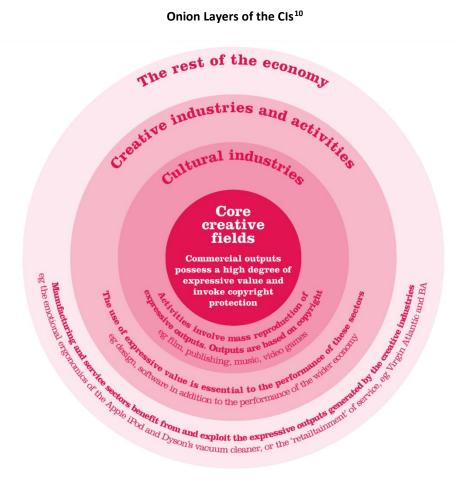
www.architecture.com. (n.d.). Built for the Environment report. [online] Available at:
https://www.architecture.com/knowledge-and-resources/resources-landing-
page/built-for-the-environment-report.

www.playing4theplanet.org. (n.d.). Playing for the Planet. [online] Available at:
https://www.playing4theplanet.org/post/carbon-complexities-report

Appendix I

The CIs are as defined by the DCMS [9] as having nine sub-sectors. However, each sub-sector has Supply Chains that feed into the activities. The 'onion layer' diagrams below represent layers of the CIs along elements that might not normally be considered as part of the CIs. These diagrams highlight supply chains that feed into the CIs, an area in which less research has been completed in terms of Sustainability.

Two versions of 'onion layer' diagrams related to the CIs are shown below. *Onion Layers of the CIs* highlights the economic place of the CIs and has four layers. *Supply chains related to the CIs* highlights the supply chains feeding into the CIs and has three layers.

Onion Layers of the CIs[10]

---

[9] The nine sub-sectors within the CIs are Advertising and Marketing. Architecture. Crafts. Design and Designer Fashion. Film, TV, Video, Radio and Photography. IT, Software and Computer Services. Publishing. Museums, Galleries and Libraries. Music, Performing and Visual Arts. https://pec.ac.uk/news_entries/national-statistics-on-the-creative-industries/

[10] Staying ahead: the economic performance of the UK's creative industries. Chapter 4 - Defining the Creative Industries https://static.a-n.co.uk/wp-content/uploads/2016/09/Creative_Industries_Chapter4.pdf

Explanation of 'onion layers' of the CIs:

- Core creative fields layer. The inner circle describes the core activities of the CIs (as opposed to the Culture Industries below) e.g. commercial outputs that possess a high degree of *expressive value*[11] and invoke copyright protection.
- Cultural industries layer. This depicts those sectors that are involved in the mass reproduction of *expressive value* and highlights the role of music, film, publishing and video games.
- CIs and activities. This highlights that CIs are cultural industries have a distinct difference. The difference being that the CIs deliver both expressive and functional value, where-as the Cultural Industries are purely expressive. The definition of the CIs[12] includes architecture, design, fashion, computer software services and advertising. This differs from the DCMS definition.

Supply chains related to the CIs[13]

---

[11]"Essentially *expressive value* creates new insights, delights and experiences; it adds to our knowledge, stimulates our emotions and enriches our lives." Definition of expressive value. https://static.a-n.co.uk/wp-content/uploads/2016/09/Creative_Industries_Chapter4.pdf

[12] Staying ahead: the economic performance of the UK's creative industries. Chapter 4 - Defining the Creative Industries https://static.a-n.co.uk/wp-content/uploads/2016/09/Creative_Industries_Chapter4.pdf

[13] Source: Multiple sources, e.g. Julie's Bicycle Creative Climate Emergency Report, DCMS CI definition and authors own work.

- Rest of the economy. This layer highlights the relationships and linkages between creativity and the wider economy and relationships between CI and supply chains.

Explanation of the 'onion layers' related to supply chains related to the CIs:

- The inner circle: highlights the Supply Chains to CIs e.g. companies that manufacture, transport and services e.g. waste, energy, etc. This is illustrated by an interviewee from a start-up that supplies biomaterials to pressing plants that then supply products to the music industry.
- The second layer: displays each sub-sector of the CI as defined by the DCMS definition.
- The outer layer: shows examples of what CI sub-sectors offer e.g. architecture/architecture related technical activities. This layer illustrates potential partnerships with other sub-sectors.

Appendix II

List of interviewees.

Job Title	Organisation Type	CI Sector	Date of Interview
Founder	Fahsion rental	Fashion	8th Febuary 2024
Director	Sustainable Vinyl	Music	15th Feb 2024
Managing Director	Visual delivery company	Visual/digital arts	26th Feb 2024
Speaker/founder	Adverstising education	Advertising	28th Feb 2024
Principal	Consultancy	Sustainability/ arts	28th Feb 2024
Director	Sustainability award	sustainability	29th Feb 2024
Founder and Director	Music/ sustainability	Music	1st March 2024
Founder	Sustainbaility sports netwrok	Sport/ sustainability	13th March 2024
Was director of sustainability at bafta	Sustainability in TV/Film	Film/Tv	15th March 2024
Head of Cultural Innovation & Creative Economy	Sustainability and social sus	Events	30th April 2024
Strategy and Sustainability Advisor	Music	Music/ Supply Chain	3rd May 2024