

Sustainable Classical

Research with the classical music sector about their attitudes to sustainability and the climate emergency

Indigo Ltd

October 2024

Commissioned by Askonas Holt



Introduction from Askonas Holt



Donagh Collins
CEO

We believe that classical music has a vital role to play in responding to the climate emergency. At Askonas Holt, we are uniquely positioned at the intersection of artists, orchestras, promoters and audiences and with that comes both a responsibility and an opportunity to help shape a more sustainable future for our sector.

We commissioned this research to listen and to learn, with a view to gaining a better understanding of where the barriers and opportunities lie. The findings in this report show that many across our industry are deeply concerned and committed yet also face very real challenges in making change. It is clearer than ever that we cannot solve this in isolation – only through collective action, partnership and creativity will we be able to turn ambition into meaningful progress.

We are committed to being a facilitator for change. We hope this report sparks conversations, builds connections, and inspires a shared sense of purpose. Together, we can chart a path toward a classical music industry that is not only artistically rich, but also environmentally responsible.

Introduction from Indigo



indigo

Katy Raines
Founder & CEO

Since 2022 we at Indigo, cultural audience specialists, have been researching audience attitudes to the role cultural organisations should play in response to the climate emergency. It is clear from the findings over the last three years that cultural audiences are far more concerned about the sustainability agenda than the general public, and that they want and expect the Arts sector, not only to play its part, but to use its creative power and influence to lead radical change.

This research was commissioned as a response to that call from audiences – specifically looking at the Classical Music sector – to try and understand the challenges, appetite and opportunities within the sector to respond positively.

The report indeed shows that the sector is ready and willing to explore solutions but acknowledges some of the significant challenges in doing so – particularly around orchestral touring.

We hope that this provides a baseline understanding of the sector as it stands in 2024/25, from which we can build and measure progress together.

Reading this report in context

Throughout 'Sustainable Classical' we reference other work undertaken by Indigo in relation to sustainability: Act Green. Act Green is the largest study of cultural audiences' attitudes to the climate emergency, and the role they see arts organisations playing in it. With almost 50K responses from audiences of over 120 cultural organisations across the UK, and repeated over three years, it represents a robust understanding of audience attitudes.

Whilst the Act Green report heard from audiences for many artforms, when referenced in this report, we have presented only the findings from audiences who said that Classical music was the artform they attended the most frequently. We have thus been able to make direct comparisons between the attitudes of audiences for Classical music and those who produce the work that they enjoy and consume.

The QR code opposite takes you to all of our Act Green reports and resources.



Act Green

Building our understanding of audience and visitor attitudes towards the climate emergency and the role of cultural organisations in tackling it.

Sustainable Classical: Summary findings



- 1 Recognising the need for change** – Those working in classical music are even more concerned than its audiences about the threat of the climate emergency, and believe the sector has a key role to play in tackling it
- 2 Slow progress** – Whilst most have managed to make considerable change in their personal lives around sustainability, there is a frustration among most at the lack of progress and inability to match this with significant change / progress in their professional lives
- 3 Challenges are seen as practical, not artistic** – Most of the sector believes the main challenges are practical and logistical – largely relating to touring; fewer have considered the potential for artistic choices to be made in a more sustainable way.
- 4 Awareness** – Few in the sector know or understand what others are doing around sustainability, nor who is leading the way in certain areas.
- 5 Opportunities for Collaboration** – All recognise the huge opportunity for collaboration around programming, logistics, relationships, partnerships, advocacy and lobbying

Methodology

An online survey was designed by Indigo and Askonas Holt, with input and consultation from orchestras, artists and venues. The survey was designed specifically to be able to capture responses from:

- **Individual Artists**, such as soloists and conductors
- **Promoters**, such as Concert Halls and Festivals
- **Touring Partners**, such as ensembles and orchestras

This was sent out via Askonas Holt's contacts internationally and responses collected anonymously. The survey remained open between 4 June 2024 – 10 July 2024.

The results have been analysed in total, and where appropriate, split out to show differences between the three groupings shown above.

Any significant differences by region have been included in an appendix.

Respondent profile = 190

70 promoters

70% Europe
21% North America
9% Other

42 touring partners

81% Europe
14% North America
5% Other

31 artists

81% Europe
19% North America

Sustainable Classical

Sections

Attitudes to the climate emergency – p8

The role of the Classical Music sector – p13

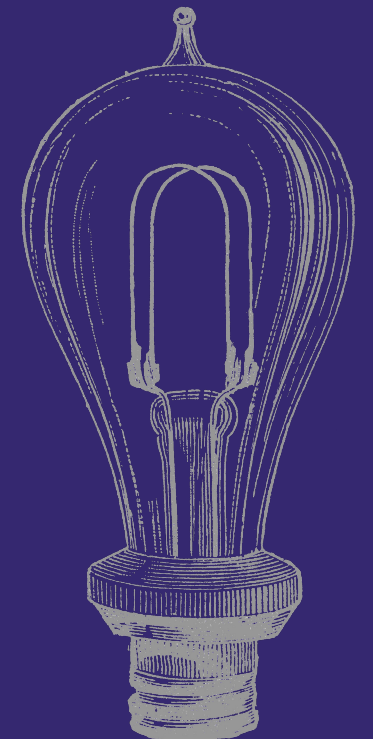
Making Artistic Choices – p28

Making Logistical and Practical Choices – p32

Sustainability Credentials – p42

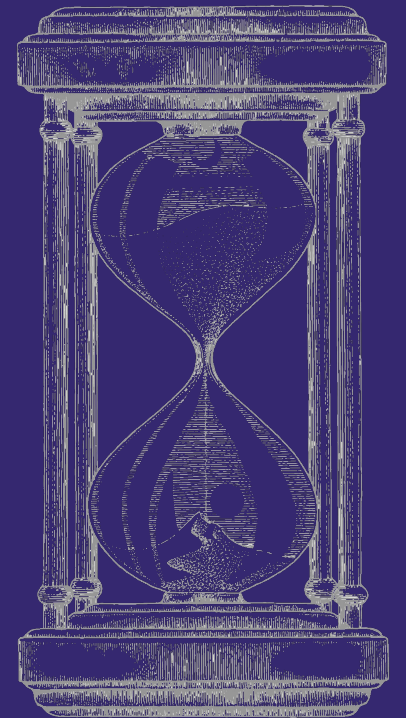
Opportunities and Support – p46

Appendix: Regional comparison – p54

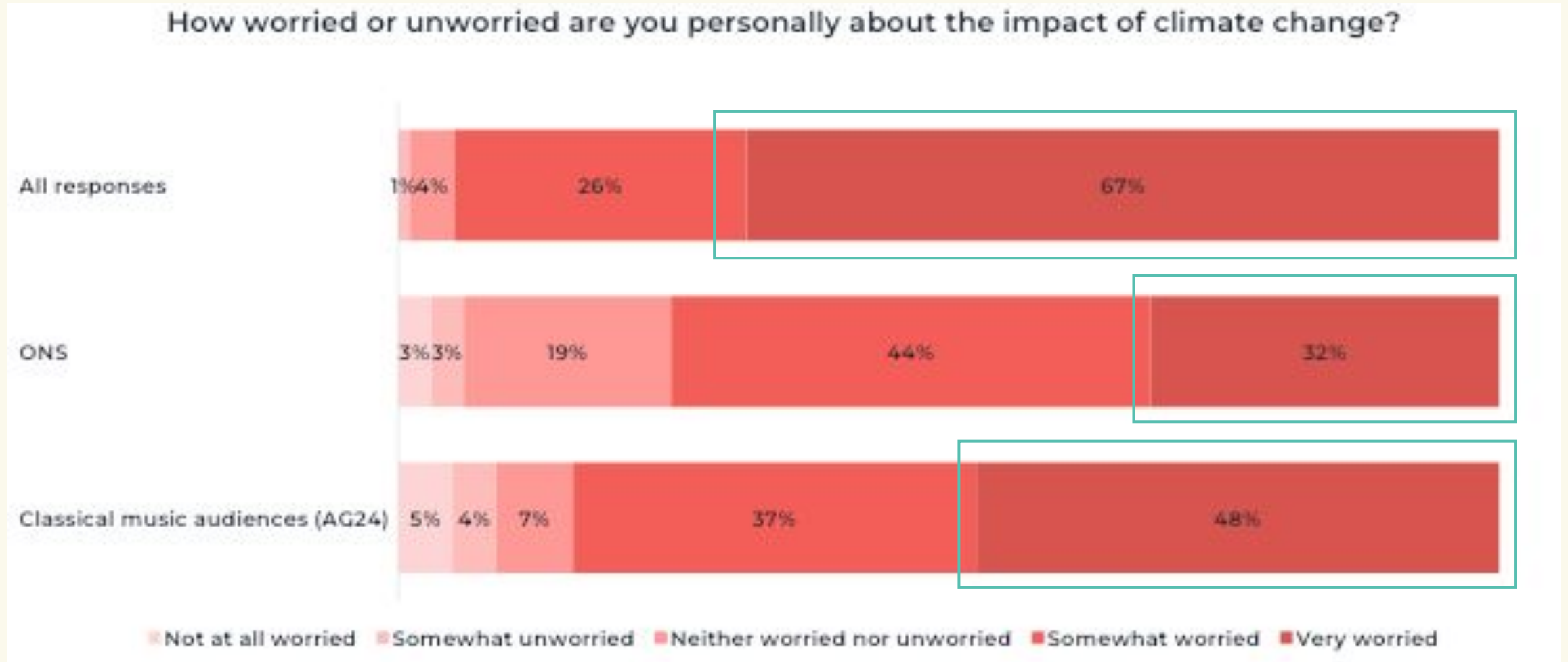


Attitudes to the climate emergency

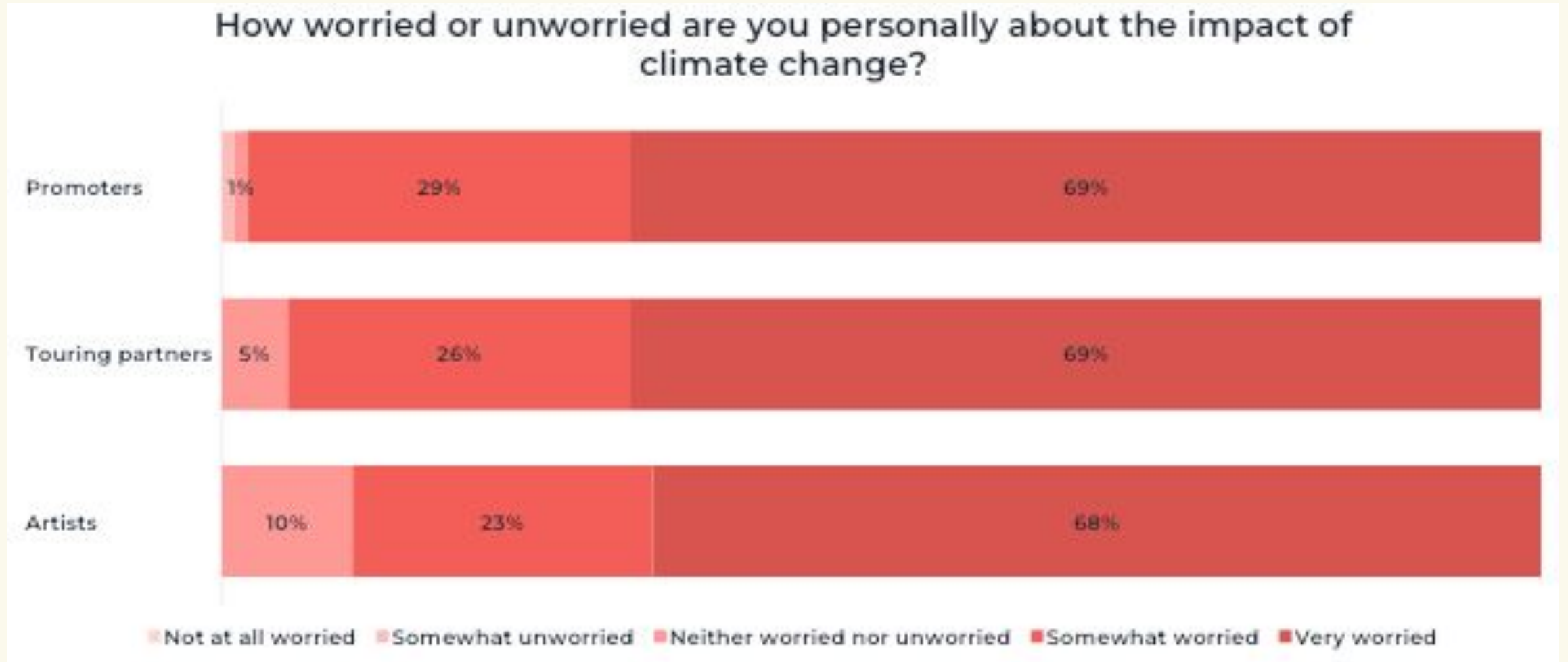
- How concerned is the sector generally about the climate emergency?
- How does this compare to cultural audiences and the general population?



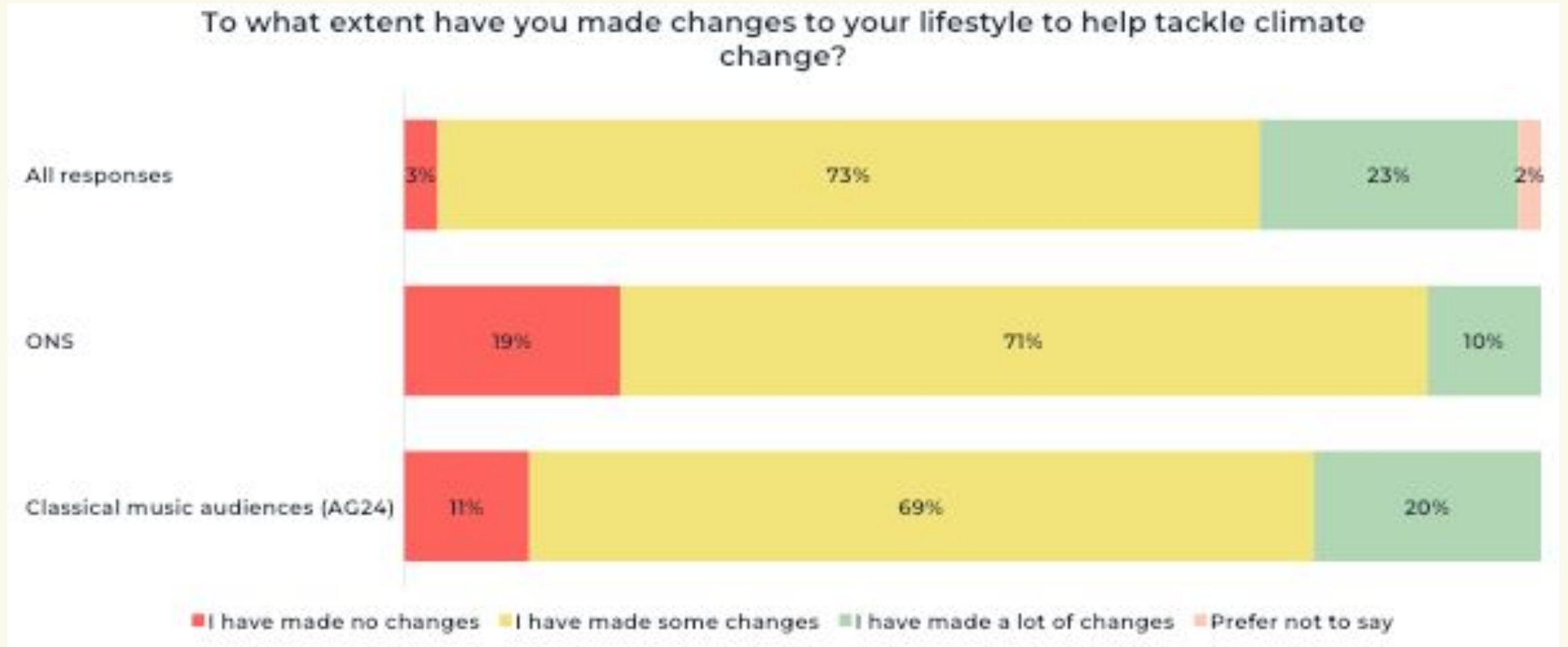
Respondents are extremely concerned about the impact of climate change – more so than audiences and the general population



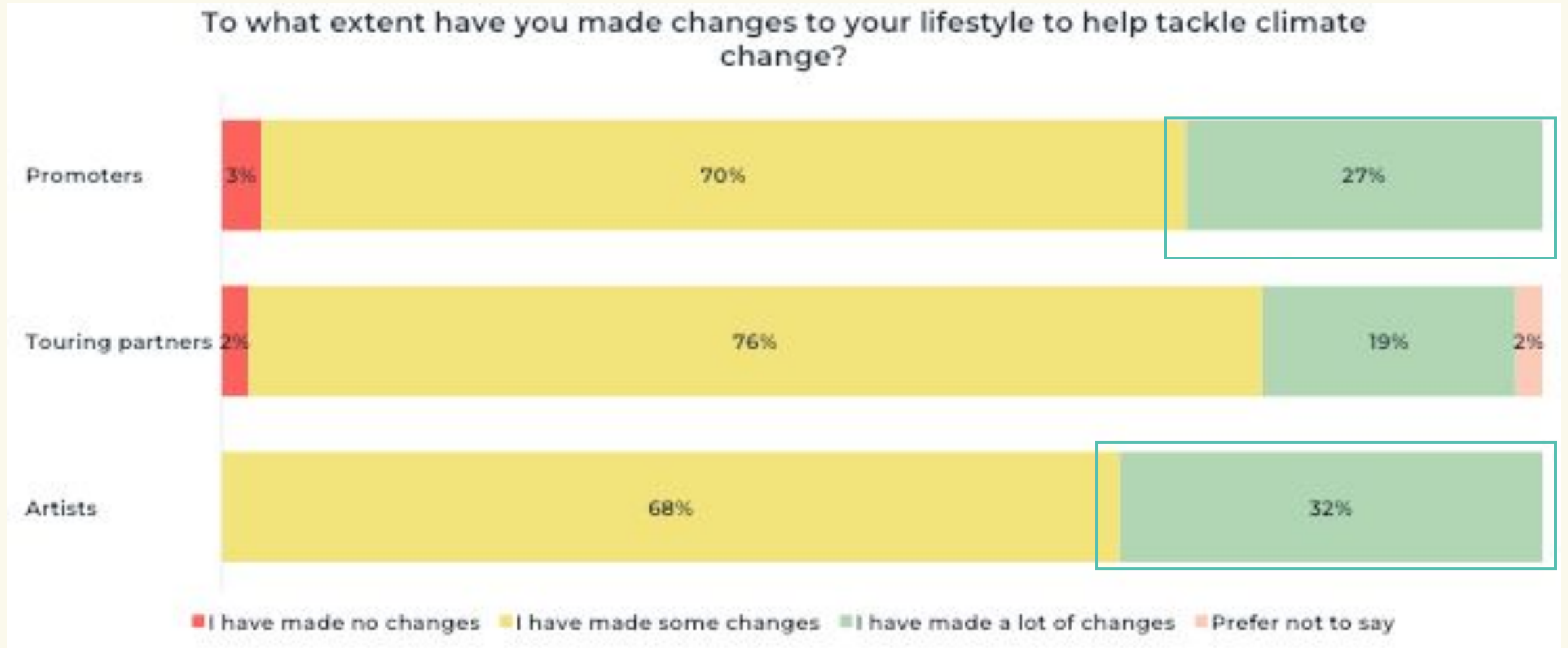
This is consistent across all three groups surveyed



Respondents are also more likely to have made changes to their lifestyle than population or audiences

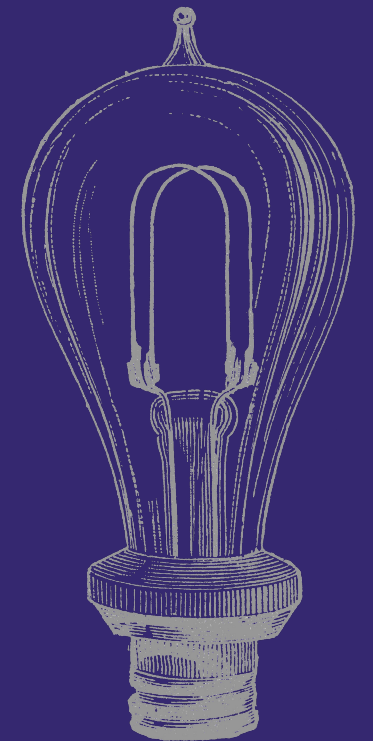


Artists and promoters were most likely to have made a lot of changes

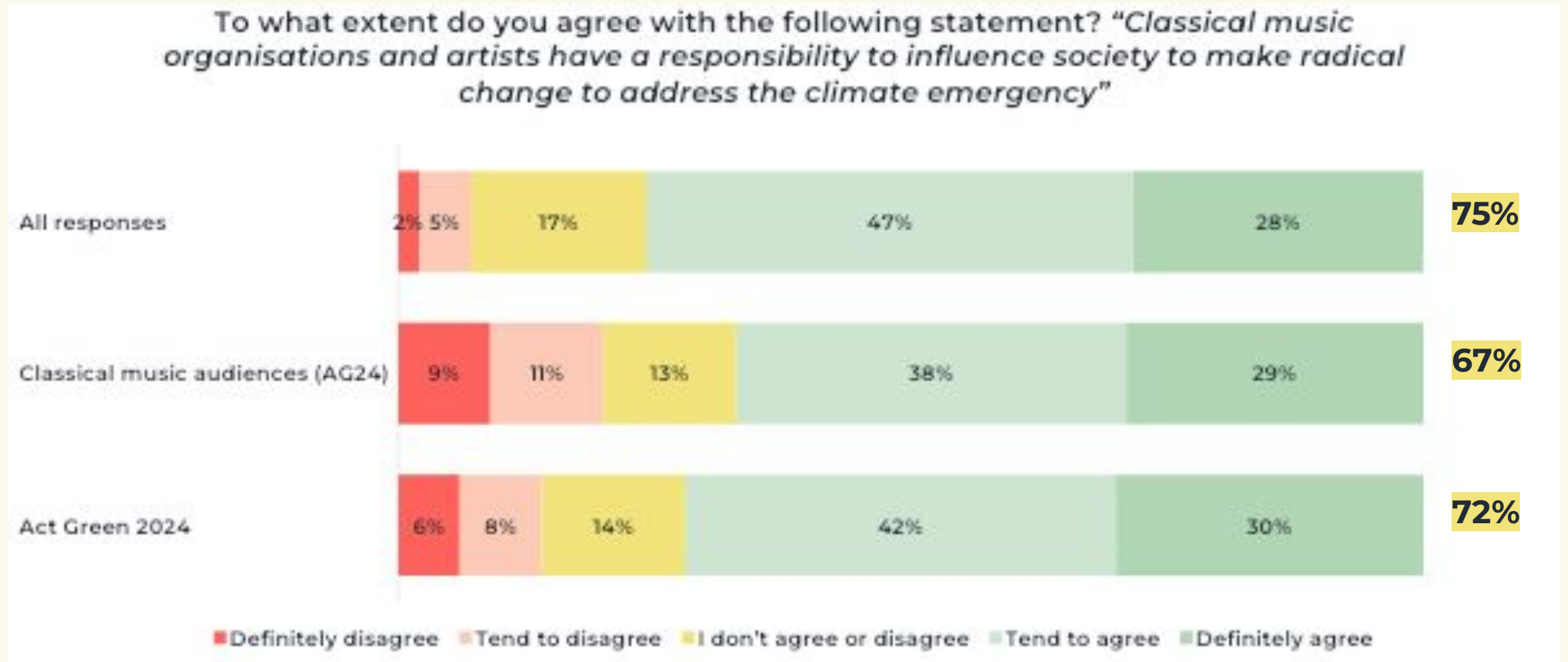


The role of the classical music sector

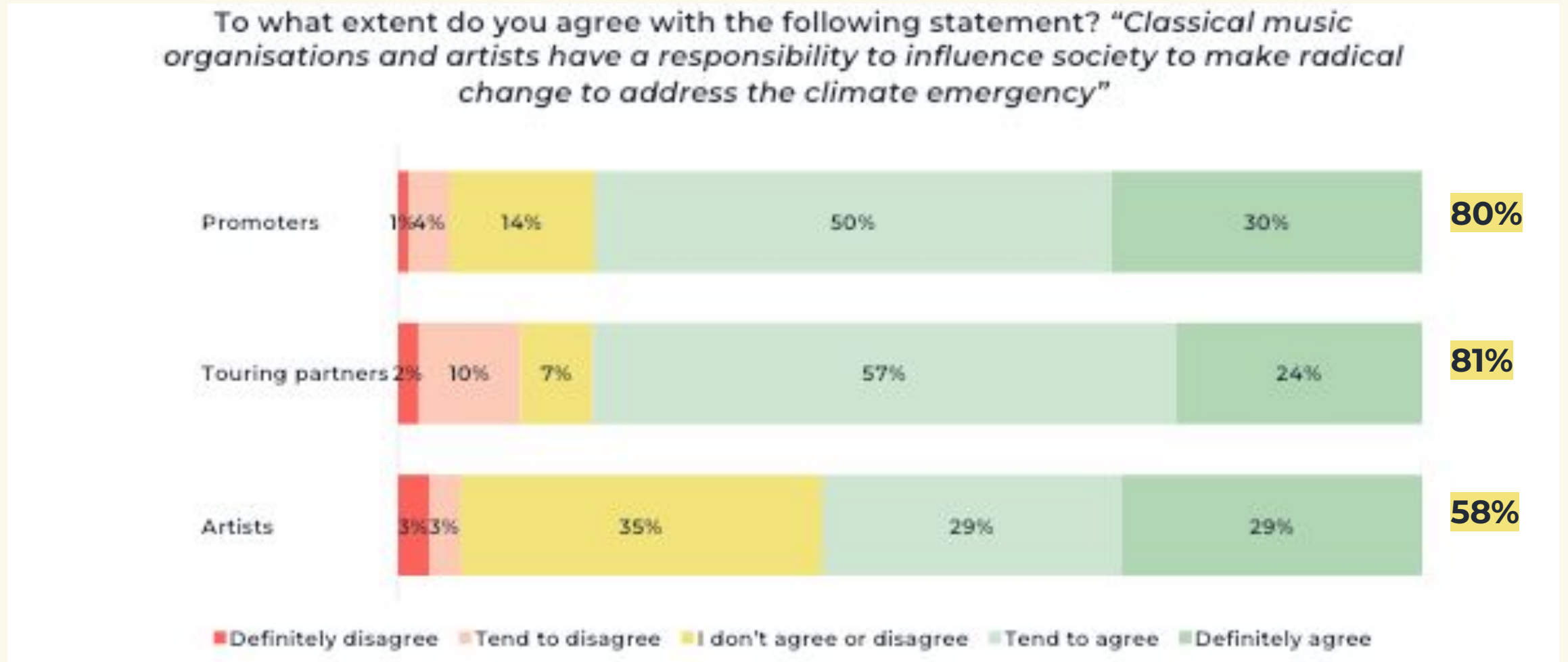
- What responsibility does the sector have for tackling the climate emergency?
- How involved are classical music organisations?



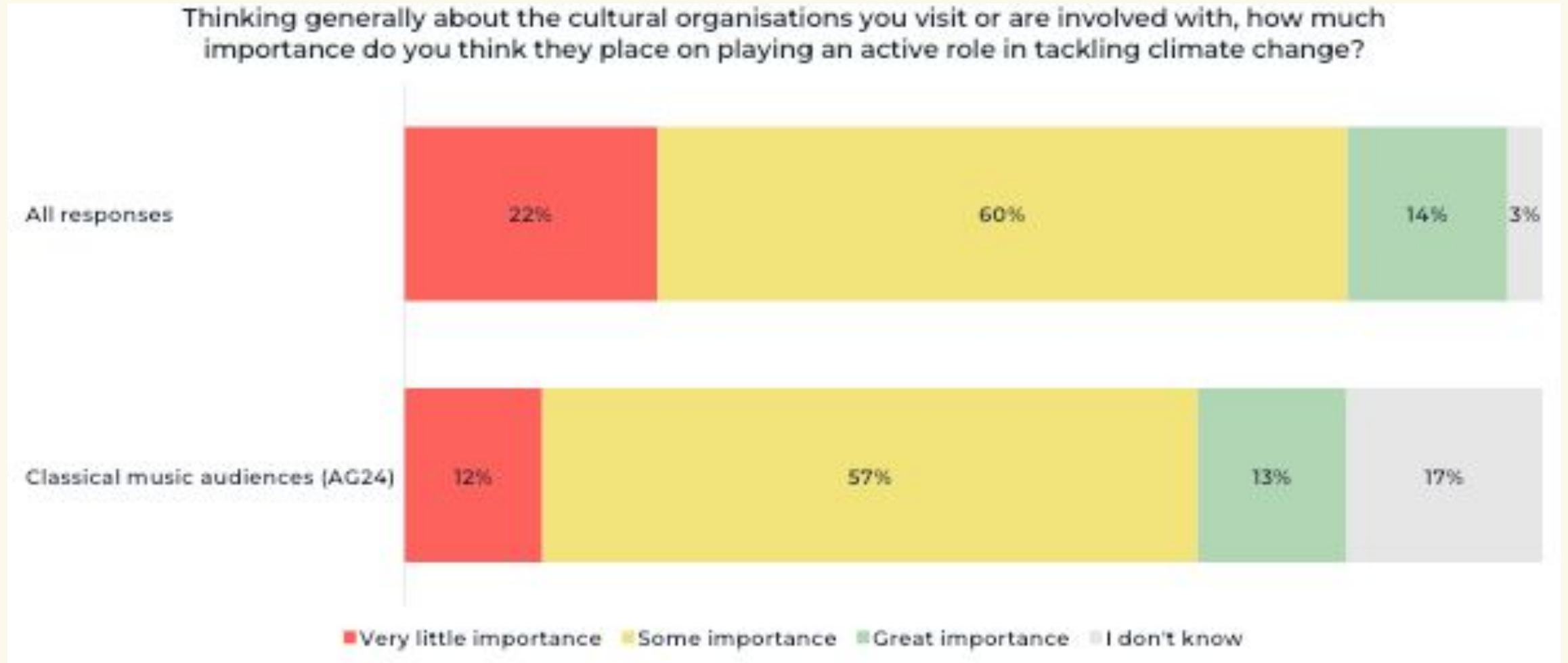
Respondents strongly believe that the sector has a responsibility to influence people to make change



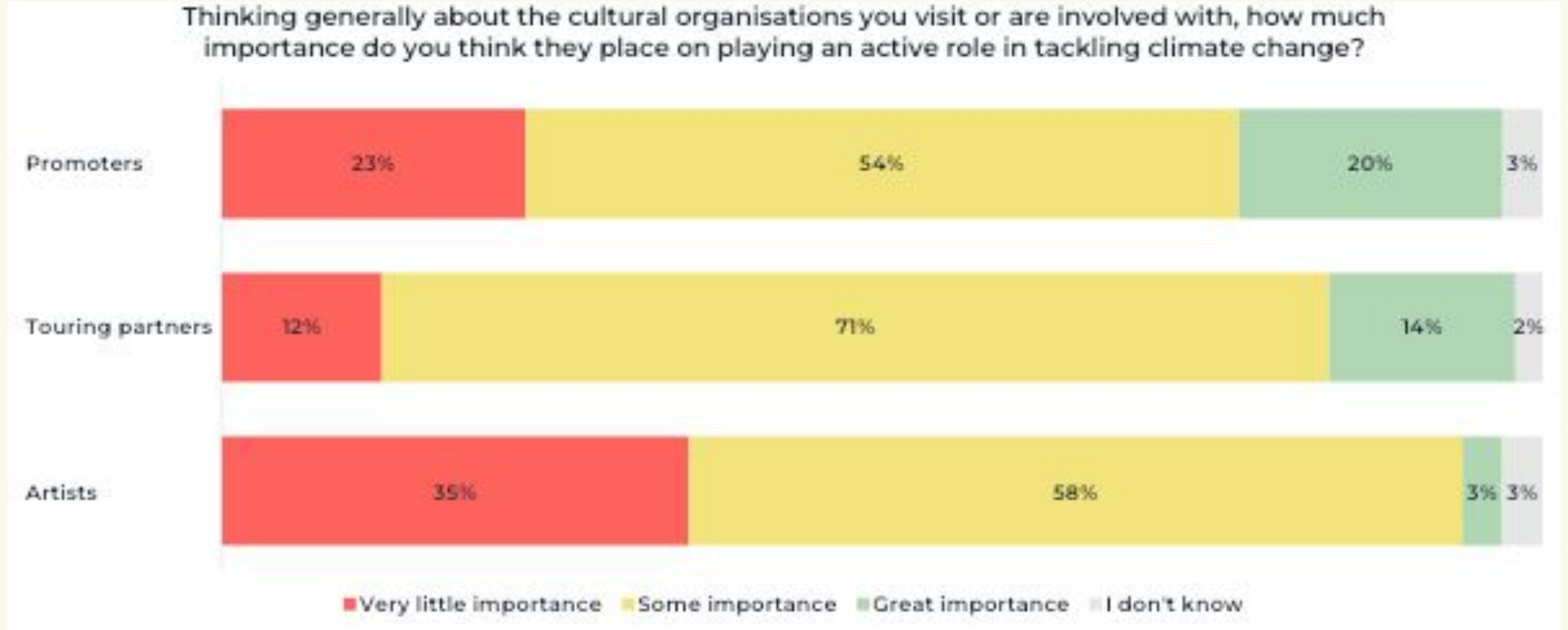
Artists are the least likely to agree with this statement



The sector is more critical about the role they are playing than audiences are



Artists are most likely to think the organisations they are involved with place very little importance on tackling climate change



What do you think are the **three biggest challenges** for the classical music sector in tackling the climate crisis over the next 5-10 years?

1 Carbon footprint of travel and touring

Artist and orchestra travel

“Our values - we currently use international touring as the main way we generate prestige... As long as we do this, we'll be dependent on high-carbon travel.” - Promoter

*“Flights: many artists are not from the producing country and need flights.”
– Touring partner*

*“Change the norm that flying a lot = success.”
- Artist*

Audience travel

*“How to motivate the audience to choose a sustainable way of coming to the concerts.”
- Promoter*

*“Audience transportation.”
– Touring partner*

Logistics and cargo

“Minimizing artists' travel and instrument cargo.” - Promoter

“Reducing the amount of freight to be taken overseas.” – Touring partner

What do you think are the three biggest challenges for the classical music sector in tackling the climate crisis over the next 5-10 years?

2 Sustainable practices in venues and productions

Energy and resource use in venues

“Lower energy consumption of venues (theatres in working order and staging).” – Promoter

“Improving the energy efficiency of buildings/operas/concert halls/rehearsal venues etc.” – Touring partner

“Producing requirements for shows – lighting / heating / power.” – Promoter

Sustainable productions and events

“Repurposing old sets and costumes.” - Artist

“Use material (sets/costumes) more often.”
– Touring partner

What do you think are the three biggest challenges for the classical music sector in tackling the climate crisis over the next 5-10 years?

3 Financial and structural constraints

Cost of sustainability

“The cost of implementing climate-friendly measures.” – Touring partner

“Budgets - slow travel generally costs more and organisations' budgets struggle to accommodate this.” – Touring partner

“Equipping artists, ensembles and orchestras financially so that they can ‘afford’ to consider green decision making.” - Promoter

Personal decisions

“Funding models, or rather lack of funding, that makes ‘getting the gig’ more important than doing the right thing re sustainability.” – Artist

“Competition between artists for work that means personal wealth will be more of a priority than building tours that are sustainable.” – Artist

What do you think are the three biggest challenges for the classical music sector in tackling the climate crisis over the next 5-10 years?

4

Leading by example and using influence

“Persuading our audiences to change their habits by setting an example.” – Touring partner

“To be a source of inspiration for the audience, by telling new stories regarding our society.”
– Touring partner

“Convincing the highest paying ticket holders that the climate fight is important. Those who can afford to participate as a regular member of the public will be the least affected members of society.” – Artist

Very few respondents have made a lot of changes to help tackle climate change



Promoters: What changes have you made?

1. Reducing travel and transportation emissions

Use of sustainable transport: Promoters are encouraging the use of trains over flights, carpooling, and public transportation, as well as adjusting travel logistics to minimize carbon emissions.

“Encouraging train rather than flight travel. More use of electric vehicles.”

“Priority to rail travel for staff and artists.”

Consolidating travel: Some promoters are booking fewer international artists or coordinating travel to reduce the number of flights.

“Trying to co-program with other institutions to reduce one-off travels.”

2. Sustainable venue operations

Energy efficiency: Promoters are improving energy use in venues by upgrading lighting, installing solar panels, and reducing energy consumption through better HVAC systems.

“As part of our Green Theatre program, we produce 25% of our energy with a photovoltaic plant.”

“Technical upgrades to lighting and equipment.”

“Solar panels on our building and battery storage system installed.”

Recycling and waste reduction: Many are introducing recycling programs, cutting down on single-use plastics, and minimizing waste by reusing materials such as sets and banners.

“Recycling, reusing, less on-site travel, switching to a hybrid car, becoming waste-efficient.”

“Recycling, water efficient toilets, water refill stations.”

Promoters: What changes have you made?

4. Sustainable catering and sourcing

Local and organic catering: Promoters are working with local suppliers, providing sustainable food options, and minimizing plastic use in catering for artists and staff.

“We have an organic garden for the artists' snacks and we do not use single-use plastics.”

“Full vegetarian catering, reducing waste, electric/hybrid cars, sustainability sessions with the team.”

5. Audience engagement and sustainable travel

Encouraging eco-friendly travel for audiences: Some organizations are offering incentives like free public transport with tickets and encouraging audience members to use greener options.

“A ticket to a concert or event of the Turku Music Festival always includes free travel on Föli local buses.”

“We encourage audiences and employees alike to use public transport.”

“The Bar is plastic free. We run a free minibus service from the local station to the venue to cut down traffic.”

6. Environmental policies and training

Sustainability training and management: Promoters are educating staff on sustainability practices, creating environmental action plans, and implementing green policies.

“A large part of our team has taken a special training course.”

“Appointed an Environmental Sustainability Manager, Published a Sustainability Action Plan.”

Touring partners: What changes have you made?

1. Reducing travel and transportation emissions

Minimising air travel: Touring partners are prioritising travel by train or bus, avoiding flights whenever possible, and limiting long-haul flights to tours with multiple performances to maximize the impact of each journey.

“No one-off concerts by plane. As many trains as possible even if it takes longer.”

“Travel distances up to 8 hours obligatory to be carried out by train or bus, on concert days up to 6 hours.”

Local instrument sourcing: Some partners are reducing cargo emissions by hiring large instruments like timpani and double basses locally rather than flying them as cargo.

“Hiring instruments locally on tour, rather than freighting them by air.”

“We hired timpani and double basses locally in Australia rather than flying as cargo.”

2. Sustainable touring practices

Residencies and fewer, longer tours: Shifting away from frequent short tours, many partners are opting for residencies or fewer but longer tours to reduce the environmental impact of repeated travel.

“Working earlier on tour routing, creating fewer but longer tours.”

Touring partners: What changes have you made?

4. Carbon tracking and offsetting

Measuring and offsetting carbon footprints: Touring partners are actively calculating their carbon emissions and purchasing carbon offsets to mitigate their environmental impact, with some organizations supporting reforestation projects or planting trees.

“We calculate the carbon footprint of the orchestra and purchase carbon-offset every year.”

“Once a year we plant trees with the orchestra to offset our touring practices.”

5. Sustainable catering and sourcing

Local and vegetarian catering:

“More bus travel rather than flights, vegetarian/local catering.”

“Our tech rider asks for ‘greener’ catering (no bottled water, vegetarian/local).”

6. Engaging local musicians and promoting regional work

Hiring local artists: *“Hiring local musicians and avoiding musicians traveling from international destinations.”*

Focusing on regional work: *“Focus on local and regional work within the community.”*

Artists: What changes have you made?

1. Reducing travel and transportation emissions

Prioritizing train and public transportation: Artists are making efforts to travel by train or bus wherever possible, minimizing air travel, and using electric or hybrid vehicles to reduce carbon emissions.

"I try to travel with trains whenever it's possible."

"I have stopped accepting engagements that require me to fly."

Relocating to reduce travel:

"I have moved to Europe to avoid excessive plane travel, and prioritize trains and buses when at all possible."

2. Conscientious touring models

Careful travel planning: Artists are grouping performances geographically to reduce excessive travel, organising tours to minimise carbon footprints, and avoiding unnecessary or long-haul flights for single performances.

"Doing as much as possible to steer a diary so that concerts are grouped near one another geographically."

3. Raising awareness and climate advocacy

Creating climate-conscious programs:

"Curating programs to specifically address this topic; finding a way to leave a 'living footprint' behind on tours; opening dialogues with presenters and audiences."

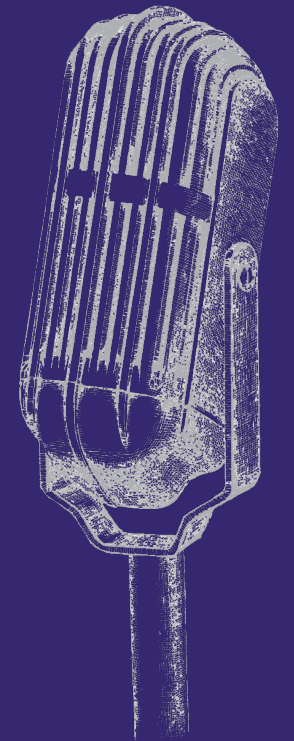
Social media and personal advocacy:

"Raising awareness on social channels."

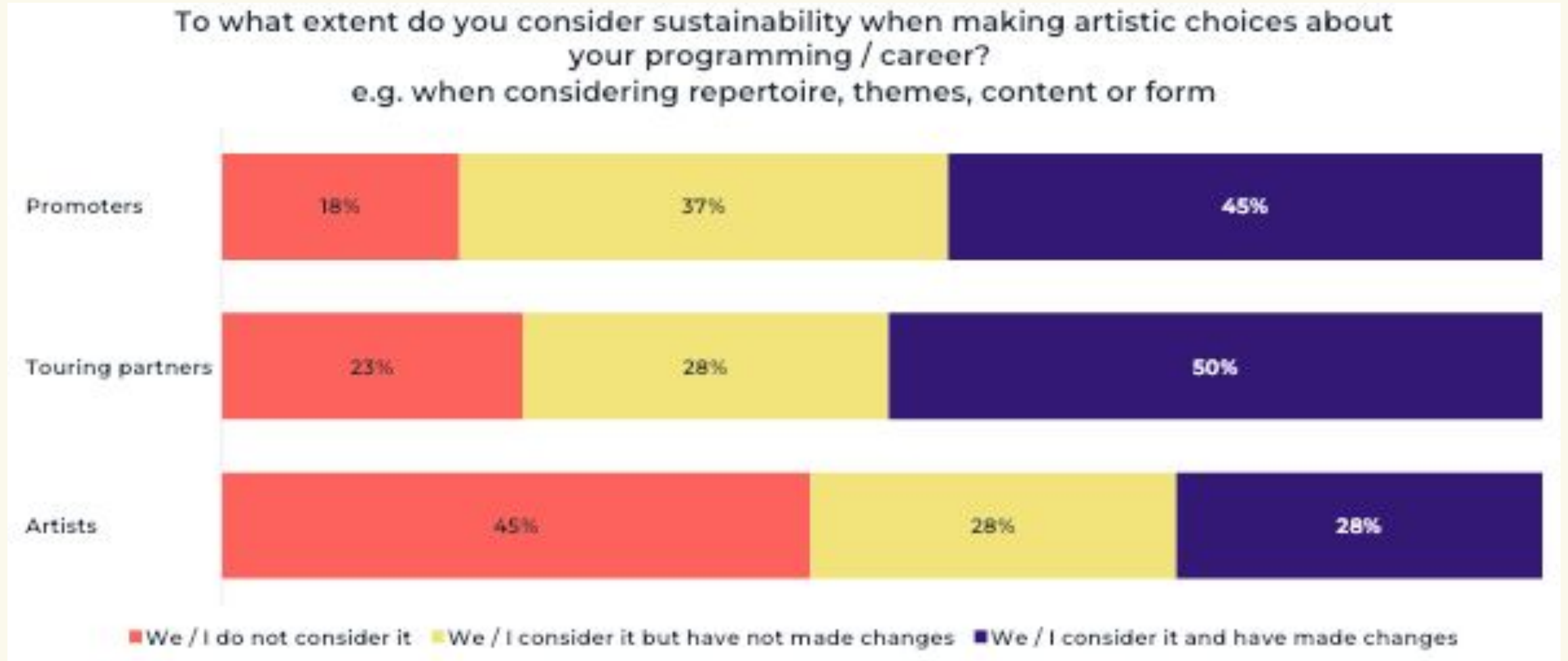
Making artistic choices

How likely are respondents to be considering sustainability when making artistic choices?

What are the challenges?

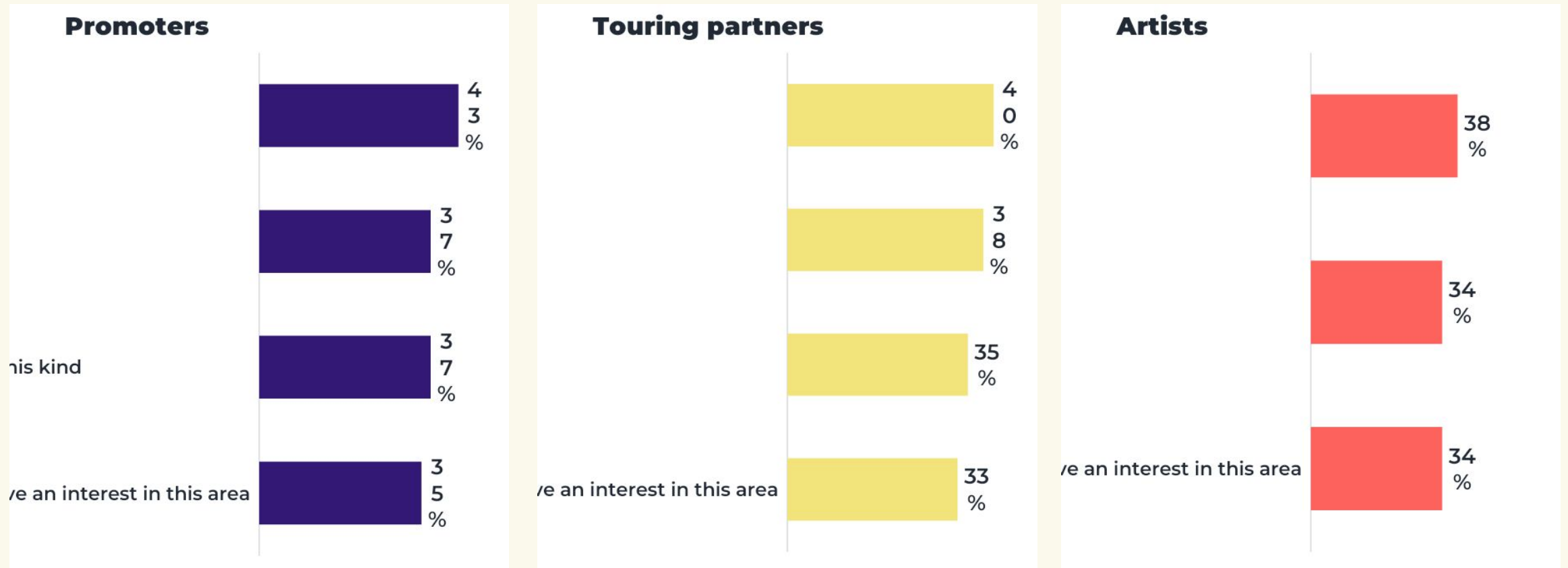


Artists are the least likely to consider sustainability when thinking about artistic choices



Lack of funding / perceived financial risk, along with lack of knowledge, are the key challenges to considering sustainability when making artistic choices

Making artistic choices and considering sustainability: Do you face particular challenges in this area?
(Select all that apply)



Making artistic choices: Other challenges

Lack of interest from leadership and audiences

“Little interest from organizational leadership or audience.”

“We have programmed concerts that, in one way or the other, address the theme. It's not something that the audience is particularly interested in.”

Balancing sustainability with artistic and social priorities

“Ensuring we have a diverse and inclusive offer from across the world.”

“Other areas of social concern are greater priorities in programming themes, etc.”

“Challenge to combine these topics with artistic excellence.”

Opposition or disinterest in climate-themed programming

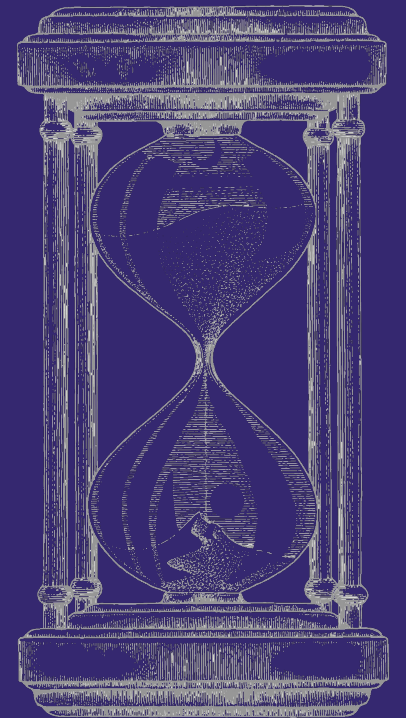
“Not a perceived lack of appetite. We've had active opposition to programming on an environmental theme.”

“Received lack of appetite from private presenters for programming of this kind.”

Making practical and logistical choices

How likely are respondents to be considering sustainability when making practical and logistical choices?

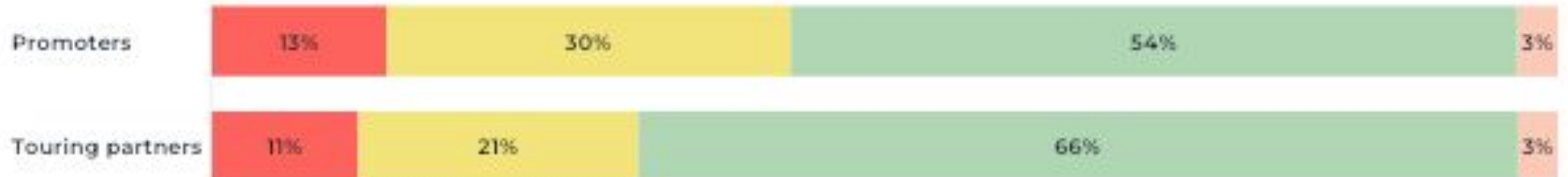
What are the challenges?



Majority of all groups have made changes to their travel when considering sustainability

When making practical and logistical choices about your programming, how much do you consider sustainability in the following areas?

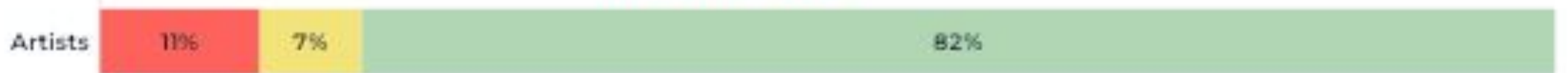
Artist travel



Travel distance

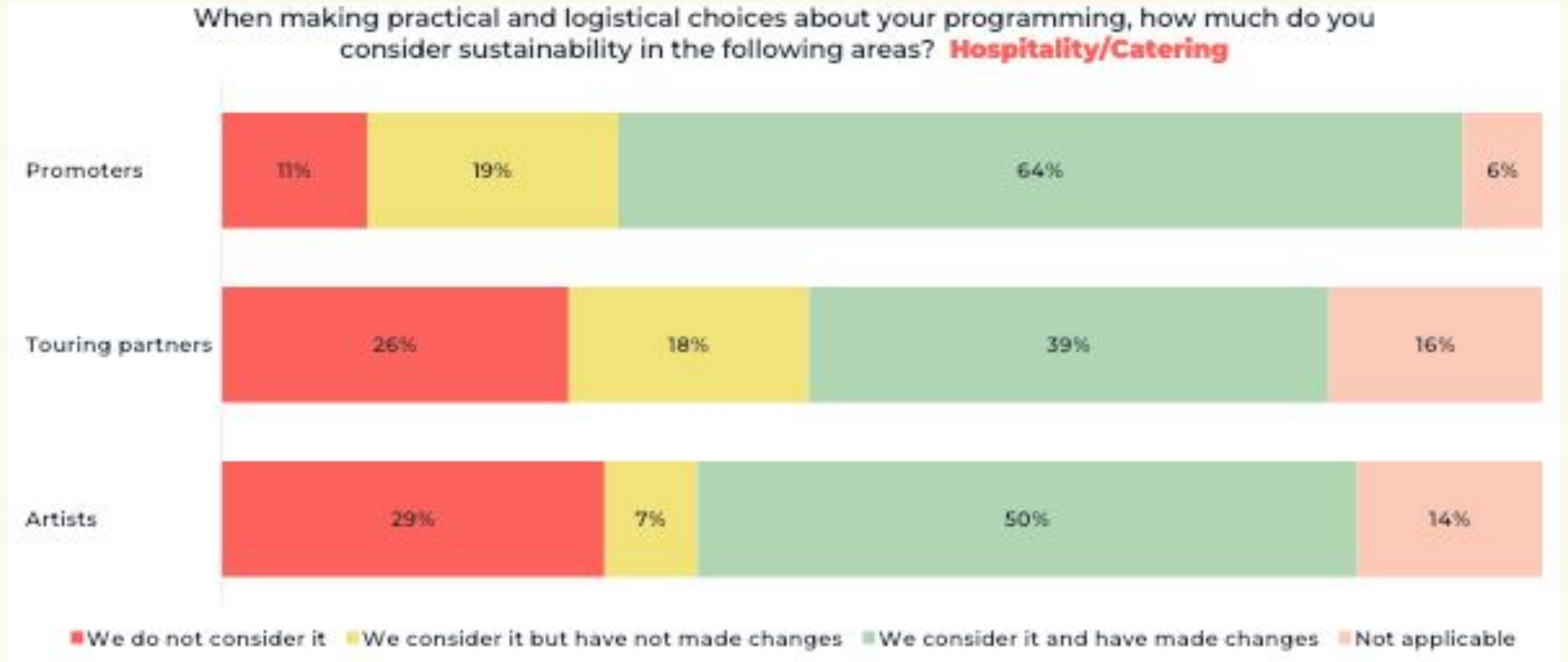


Travel method



■ We do not consider it ■ We consider it but have not made changes ■ We consider it and have made changes ■ Not applicable

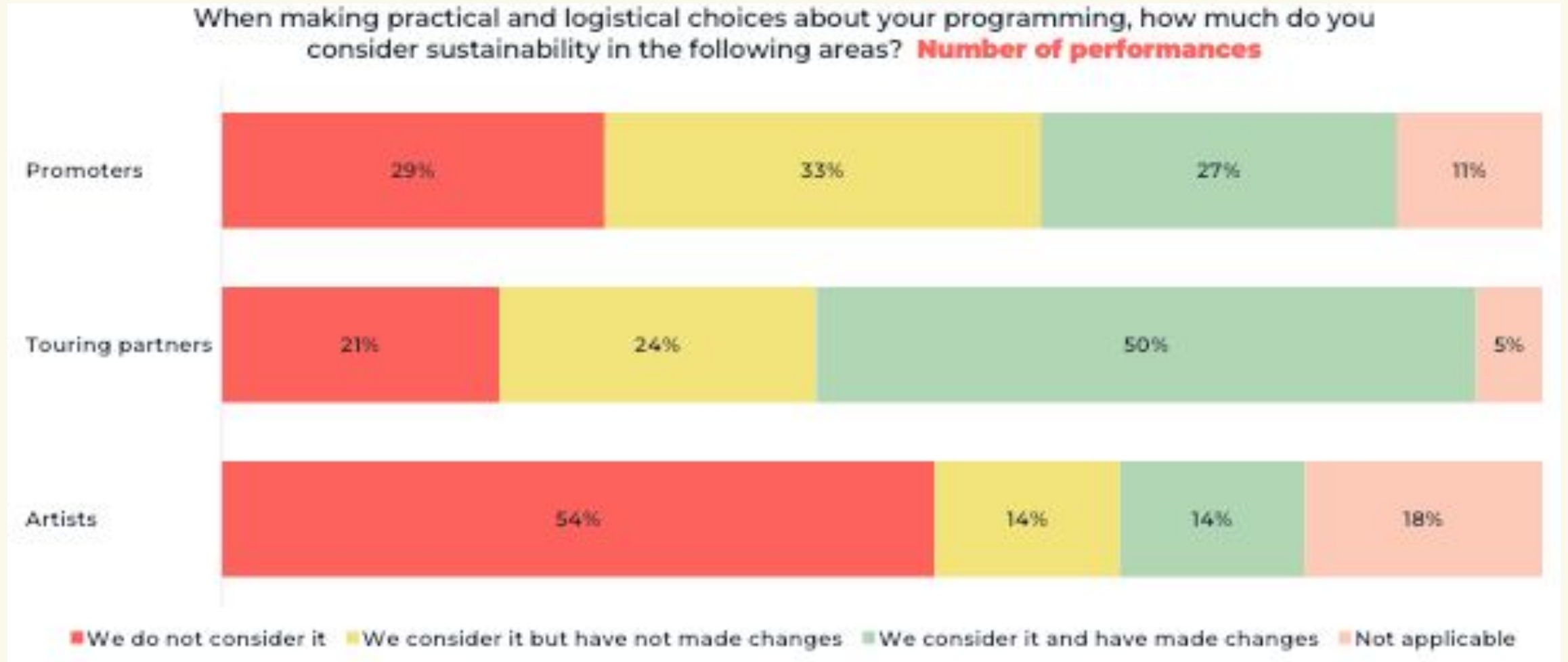
All groups consider hospitality or catering and have made changes



Two thirds of touring partners have made changes to tour routing and performance location



Touring partners are most likely to be thinking about the number of performances



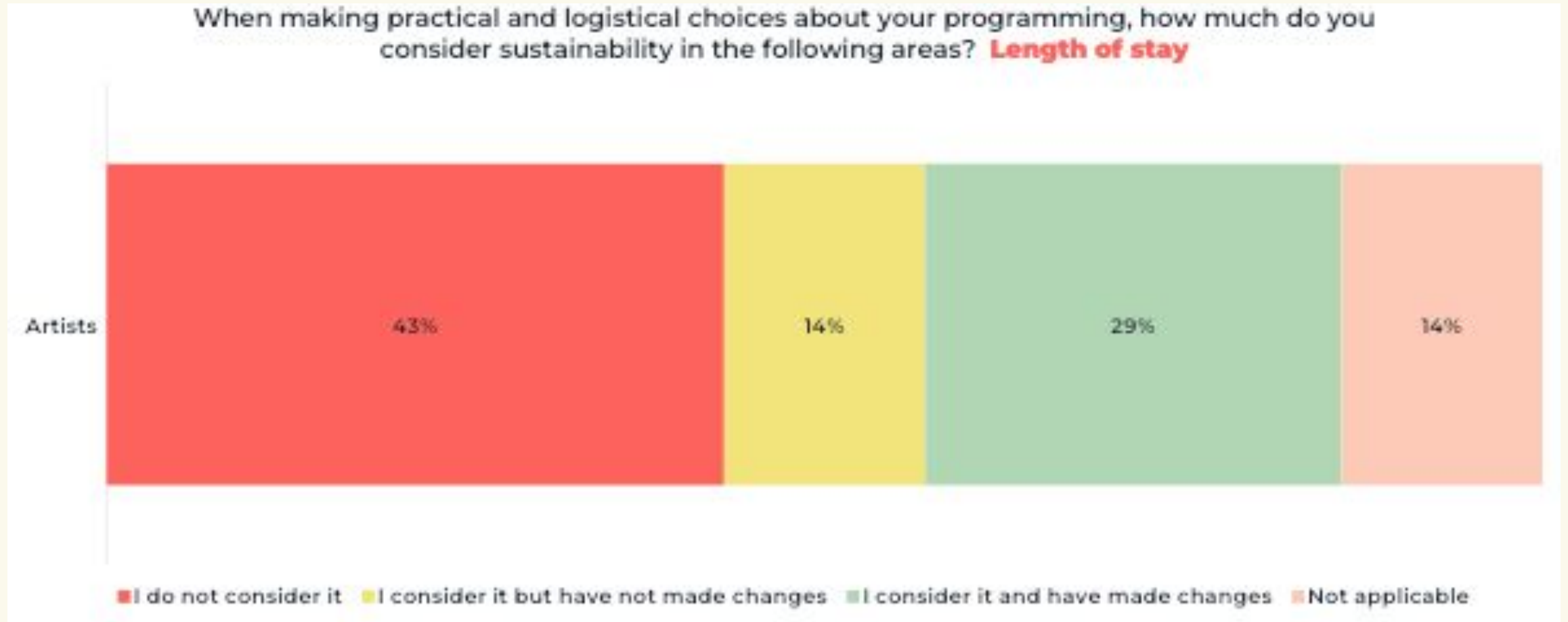
42% of touring partners consider cargo when thinking about sustainability



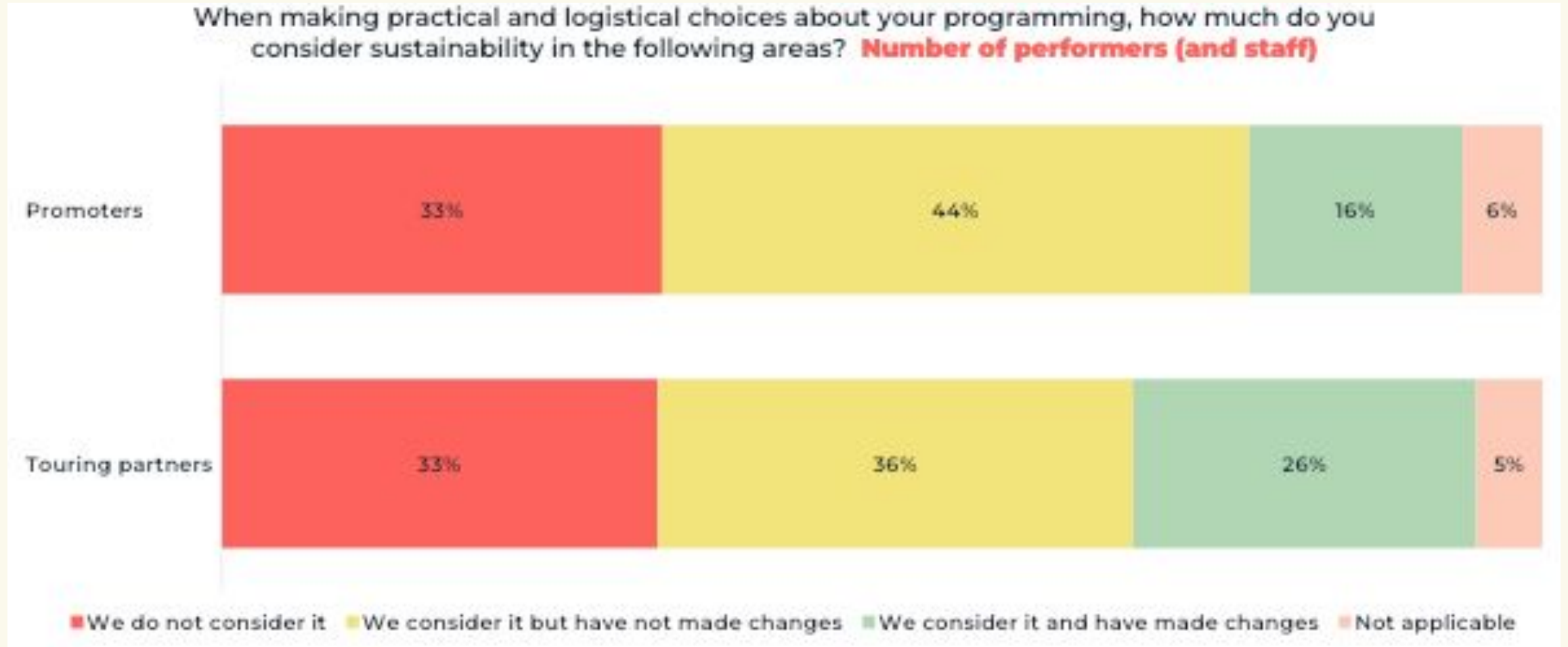
Half of artists and a third of touring partners have made changes to their accommodation choices



Less than 1 in 3 artists have made changes to their length of stay

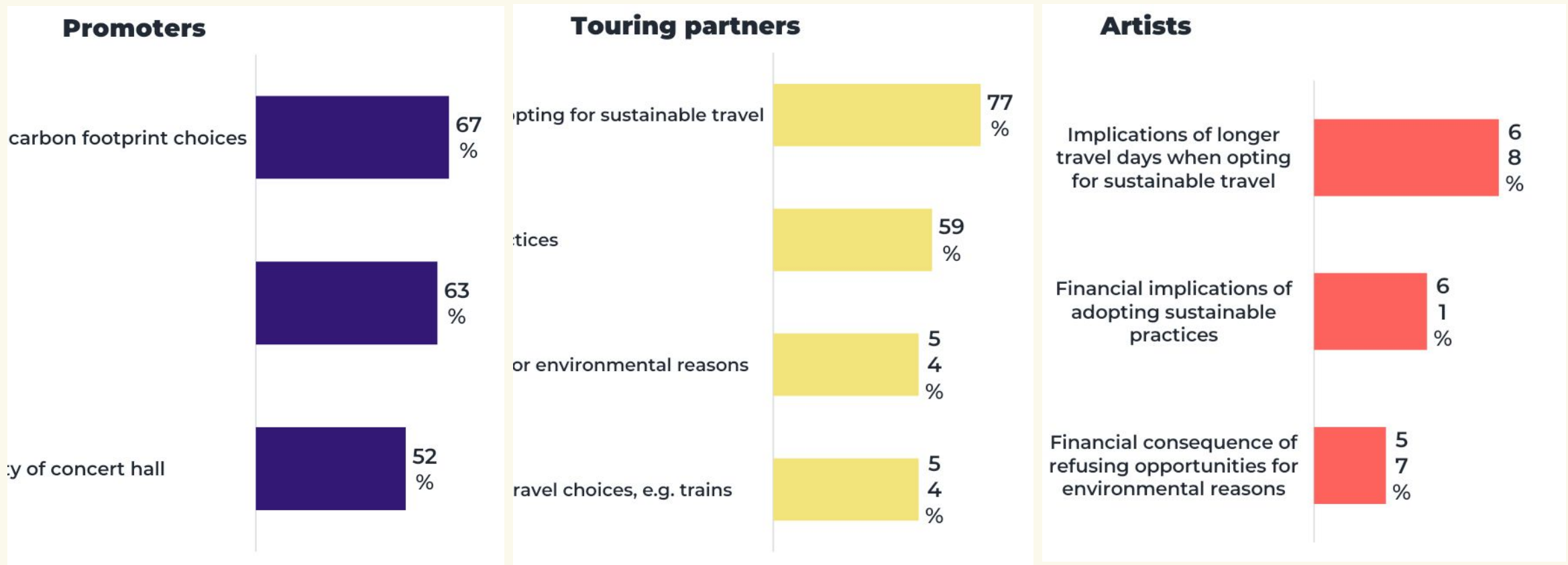


A third of touring promoters and touring partners do not consider the number of people they are touring



Financial implications are key challenges for all three groups – as well as implications of sustainable travel

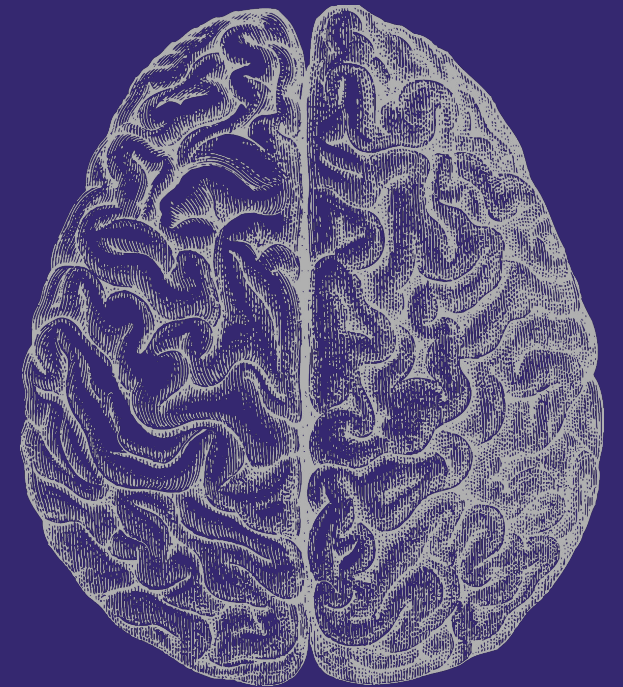
Making practical and logistical choices considering sustainability: Do you face particular challenges in this area? (Select all that apply)



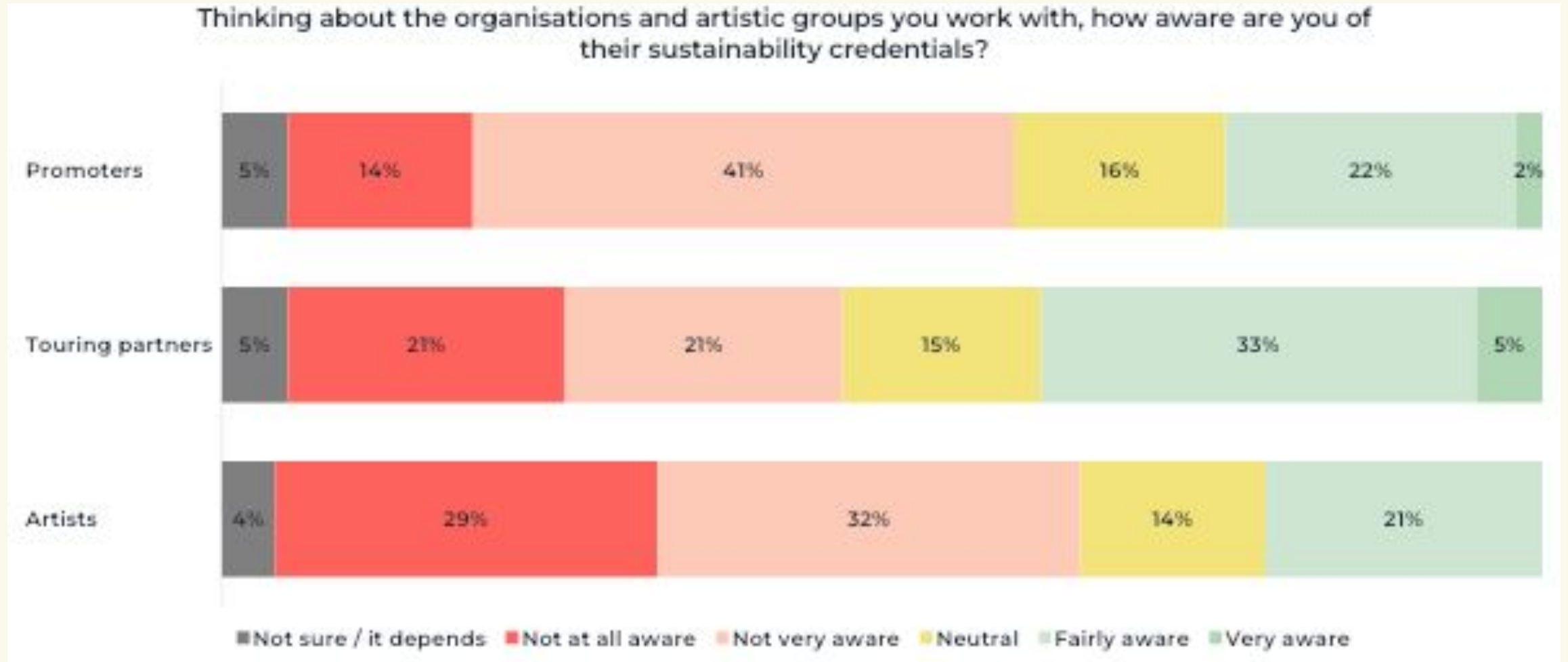
Sustainability credentials and choosing who to work with

What do respondents know about the organisations they choose to work with?

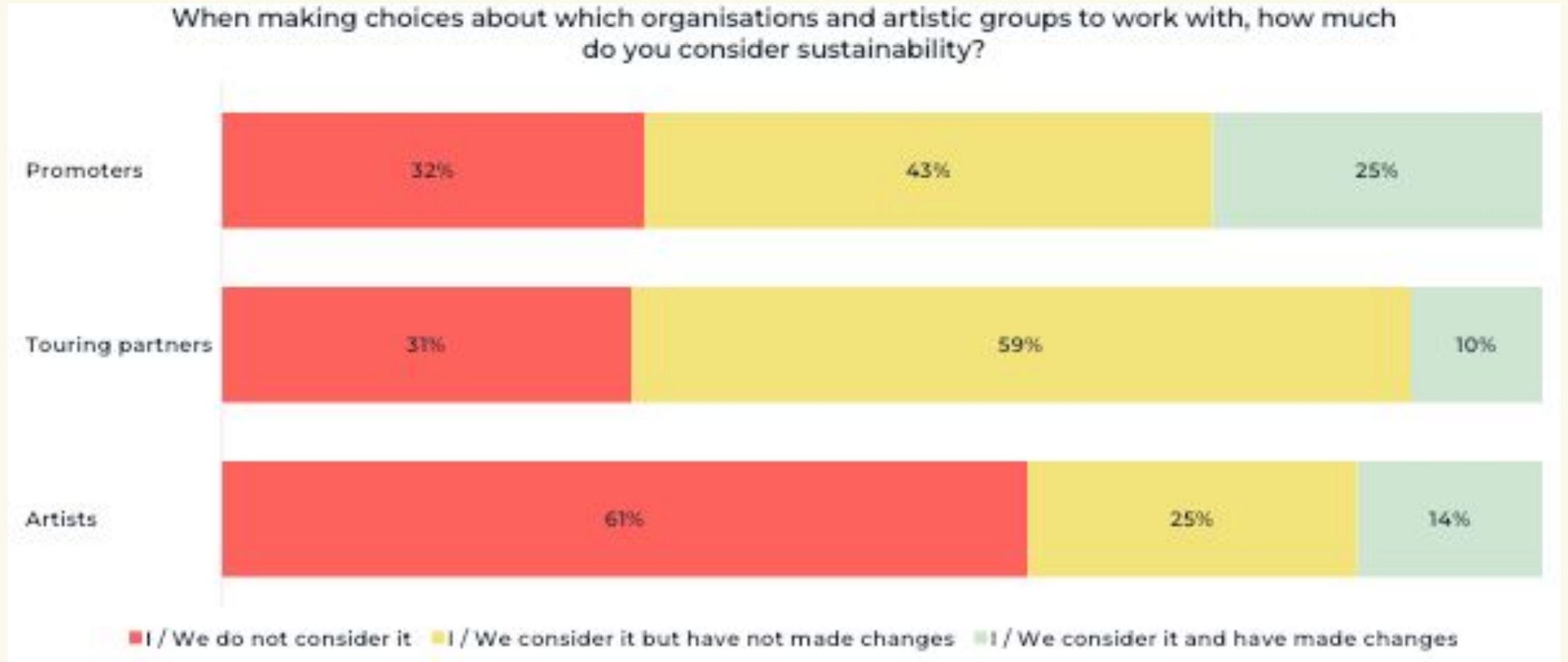
Where does the pressure come from?



There is a general lack of awareness from all groups about other organisation's sustainability credentials

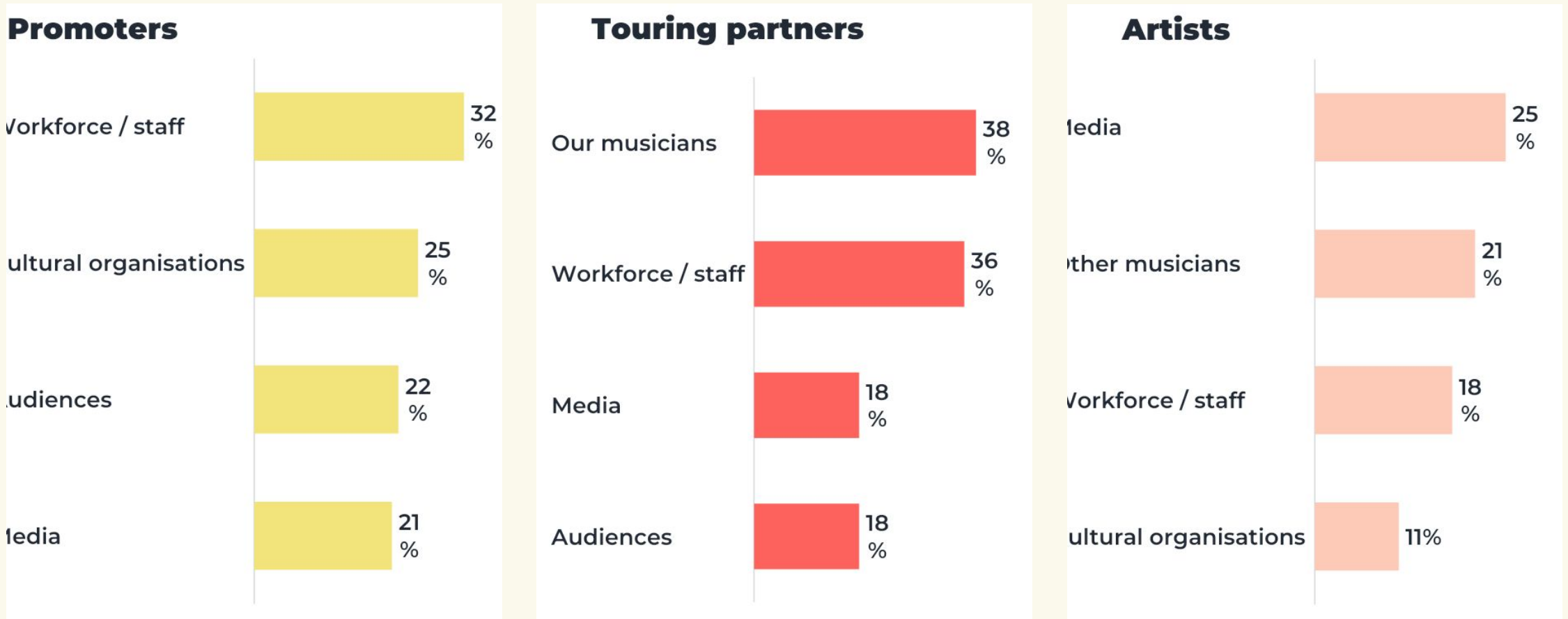


When choosing who to work with, very few respondents have made changes based on sustainability – artists are least likely to even consider it



Pressure to improve sustainability efforts comes from workforce, other organisations, audiences and musicians – artists are most influenced by the media

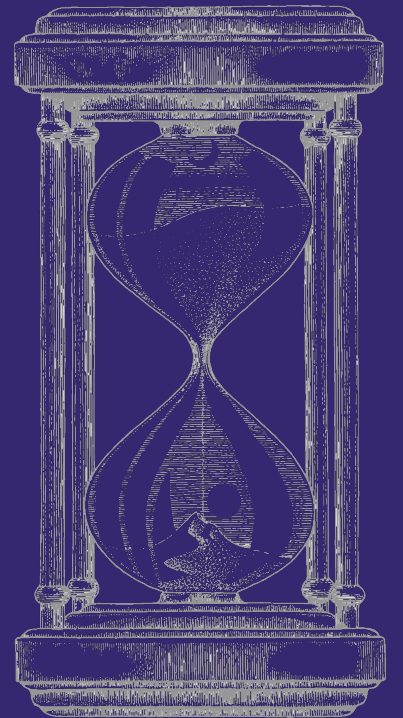
Do any of the following put pressure on you to move faster or further in your sustainability efforts? (Select all that apply)



Opportunities and support

What do respondents think are the main opportunities?

What support do they need from Askonas Holt or elsewhere?



Programming: What would you say are the particular opportunities for collaboration within the classical music sector when it comes to tackling climate change?

Making sustainable choices of artists and performances

"priority to artists from the same geographical area"

"working with colleagues to enable longer residencies and more sustainable tours and travel"

Thematic and educational programming

"music and projects that bring awareness to the issues and help with solutions"

"bring creativity and enhance climate communication in ways that other sectors cannot do"

"environmentally themed concerts, workshops and masterclasses"

"feature programs that not only tell climate-related stories but how the program was developed and its carbon footprint"

Collaborative and resource-efficient projects

"more collaboration between promoters and agents to make good use of an artist's travel"

"more involvement in shared productions"

Logistics and planning: What would you say are the particular opportunities for collaboration within the classical music sector when it comes to tackling climate change?

Sustainable travel and transportation

"Artists working with venues to accommodate sustainable travel choices"

"Make sure musicians favour environmentally-friendly means of transport"

"encourage and incentivise artists to avoid air travel"

"prioritising train travel"

Collaborative tour planning and logistics

"Joining up of tours to ensure that maximum value is had from travel"

"Regional collaboration between promoters and agencies in order to make touring sustainable"

"Promoters and presenters working more closely together to advocate for making the right sustainable choices"

"Cooperation between promoters to make itineraries sensible"

"Plan further ahead... to draw together the best routing for a tour"

Local and regional focus

"Touring that is 'deeper', keeping to smaller geographical areas and engaging more meaningfully with local communities and musicians"

Relationships and partnerships: What would you say are the particular opportunities for collaboration within the classical music sector when it comes to tackling climate change?

Local and regional partnerships

"More collaborative projects with regional/ local partners"

"Foster relationships with closer partners (in the same geographical area) instead of ignoring them considering that only what is international is great"

"We need more collaborations between houses and festivals in reasonable travel distance!"

"Focusing on local partnerships we might not have considered in the past"

Cross-industry collaboration and shared frameworks

"Shared lobbying for more sustainable supplier and public transport availability"

"Shared approach across the industry to make changes possible – cost and risk can't all rest with the orchestra"

"Collaboration around a sustainable touring/performing framework to also include audiences, venues"

"More collaborations and coproductions"

"Interdisciplinary opportunities: collaborating with media figures, writers, environmentalists, artists etc."

Partnering with environmental and public organisations

"Partnering with environmental organizations"

"Build partnerships with organizations focused on climate and receive input how arts and culture can be more effective"

How do you think Askonas Holt could support you, or the sector more broadly, in this area?

Promoting sustainable travel and tour planning

"Prioritize routing of artists to reduce carbon footprint, rather than best fees and traveling all over the world"

"Propose a train solution within the first travel options you give the artist"

"Finding the most cost-effective travelling options"

"Encourage venues to be more flexible with their dates in order to create coherent tours"

"Finding ways of easily sharing information about when soloists/conductors are visiting Europe/the UK so that we Orchestras can avoid booking artists to travel intercontinentally for just one or two engagements"

Collaboration and knowledge sharing

"Encouraging promoters to work together to establish sustainable itineraries"

"Working collaboratively with the other tour agents to aid a more holistic approach for tour routings"

"By bringing together partner organisations...so that as a whole sector we can lobby the government"

How do you think Askonas Holt could support you, or the sector more broadly, in this area?

Encouraging artists and industry to adopt sustainable practices

"Instil a culture amongst artists that train travel, where possible, should be booked over flights"

"Helping persuade its artists to accept the EUYO's Green Contract clauses in all artist contracts"

"Make your artists aware of their choices and how to minimise their CO2 footprint"

"Educating their artists to make more responsible choices, e.g., about the carbon impact of travel/ accommodation/ food etc."

"Artists should accept slightly fewer engagements... and not steadily travel across the world"

"AH can play a part in educating their artists to make more responsible choices"

Leading and influencing sustainability in the sector

"Askonas Holt could help us raise awareness among musicians of climate change, the impact of their travels"

"Askonas Holt can join us in encouraging artists to avoid air travel"

"Leadership from AH is exactly what's needed, to model and encourage change to the wider sector"

"As an agency, Askonas Holt could help us raise awareness among musicians"

What other kinds of support do you need from other organisations or public bodies?

Financial support and incentives

"Grants to help with specific goals related to an organization reducing their carbon footprint"

"Funding for improvements to infrastructure"

"Funding schemes for sustainable planning (in content and structure)"

"Funding. Funding. Funding. ;-)"

Sharing knowledge and best practices

"Sharing good practices and studies"

"Distilling info/sharing shortcuts with smaller organisations"

"Best practice guides would be helpful"

"Searchable case studies to inspire and inform good practice"

Research and expertise

"Research on the increase in costs/budget required to enable a more sustainable way of working"

"To get better expertise in the field: human resources and help to create the carbon footprint measurement"

"Strategic views about how to change the relationship to concerts"

Is there anything else you'd like to share with us?

"Thank you for doing this survey, it's great you're putting an emphasis on these issues."

"Thank you for your work in this area. It really is very much appreciated."

"Thumbs up for this survey and action. Good luck!"

"Thank you for this survey and for taking the lead at this critical juncture."

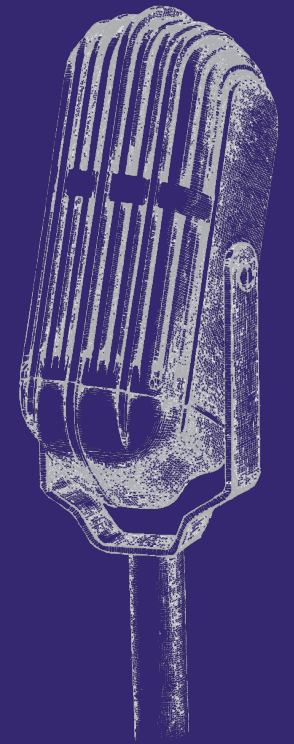
"I'm so glad to learn that you are trying to find ways forward for the music industry and I look forward to read the results of your research."

"It's so fantastic you're tackling this. Having AH set out an intentional plan for modelling better practice in this area is absolutely wonderful."

Appendix

Regional comparison

North America vs Europe



Comparison of responses from Europe (139) with North America (33)

- Respondents are equally concerned about the climate emergency (69% and 70% very worried) but European respondents are more likely to have made lifestyle changes (24% have made a lot vs 12% of North American respondents).
- European respondents are more likely to agree that 'Classical music organisations and artists have a responsibility to influence society to make radical change to address the climate emergency': 78% agree vs 63% North America. Strength of feeling in response to this question is very different: 33% of European respondents 'Definitely agree' vs only 7% of North American.
- European respondents are more likely to have made changes to working practice (20% 'a lot of changes' vs 13% of North American) and to consider sustainability when thinking about programming.
- Consistently North American respondents are less likely to have considered sustainability or made any changes to their practical and logistical choices.
- European respondents are more likely to be aware of the sustainability credentials of the organisations they work with – North American respondents are more likely to be 'Not at all aware' (29% vs 16%) or 'Not very aware' (38% vs 33%).