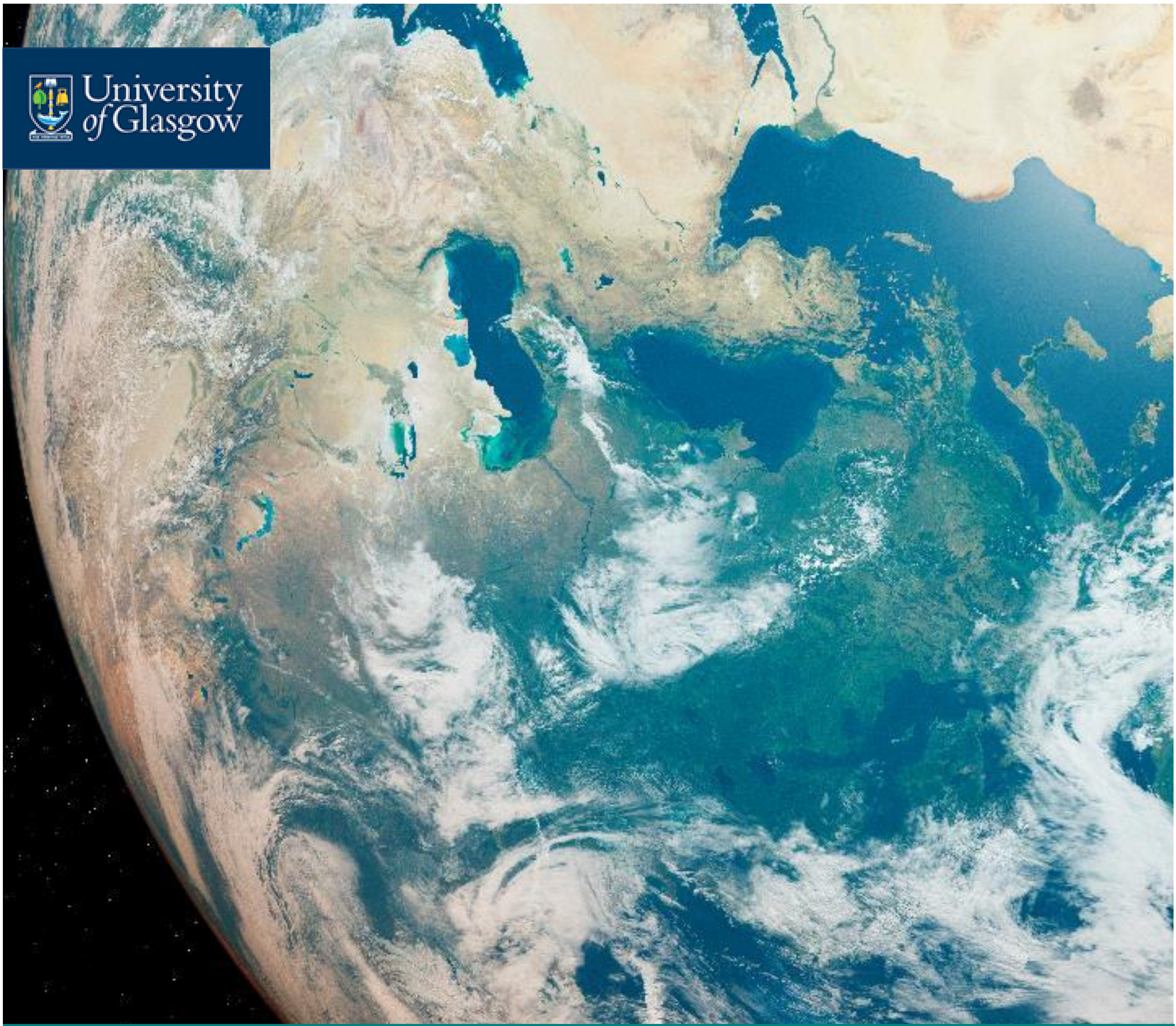

‘Turn Up the Volume’ Survey

Music Fan Attitudes towards Climate Change & Music Sustainability

INITIAL REPORT

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9th May 2022

Contents

EXECUTIVE SUMMARY

- This report presents initials findings and conclusions based on a nationally representative YouGov UK panel survey. The survey asked a range of questions related to music, listening/purchasing habits and attitudes towards environmental issues such as climate change. The main goal was to analyse the attitudes of music fans towards climate change and sustainability in the music industry.
- The findings indicate that music fans are more engaged with environmental issues than the general public. This includes being more likely to care about climate change and place a higher priority on tackling climate change in general and within the music industry. These results are robust to different definitions of music fandom, including definitions which focus on listening and spending habits.
- There is also some evidence that people who engage in music in multiple ways, for example by identifying music as important, listening regularly and spending money on musical products, are even more likely to be concerned about climate change and support efforts to address this.
- The findings suggest a low level of knowledge of existing sustainability initiatives in the music industry even among very engaged fans and regular music listeners. However, music fans do show an interest in learning more about such initiatives.
- Finally, there is evidence that many music fans are prepared to change their consumption habits to support more sustainable products and practices. For example, people who spend money on physical products such as records are especially willing to spend more on sustainable physical products, while live event attendees are especially willing to spend more on sustainable events.

Music Fans, Sustainability and Climate Change.

INTRODUCTION

The University of Glasgow has partnered with a range of music industry stakeholders - Music Declares Emergency, British Phonographic Industry (BPI), Secretly Group, Beggars Group, Involved Group, and Key Production - on a new piece of audience research that aims to offer insights into the perception of climate issues amongst music fans. The project is also funded in part by the UK’s Natural Environment Research Council.

With announcements from music industry initiatives such as the Music Climate Pact, Live Green, and the Association of Independent Music (AIM) highlighting the commitment of the UK music industry towards a net zero future, the research also assesses whether recent industry initiatives are influencing audience thinking and the importance music fans place on climate issues in their purchasing choices.

Led by Dr Matt Brennan, lead investigator of 2018’s UK Live Music Census, and social data science expert Dr Mark Wong, with research assistance from Dr Dave McKeever and PhD candidate Daniel Shaw, the project compares responses from a nationally representative sample of the UK population via a YouGov poll, with targeted responses from music fans across a spectrum of genres.

This paper will quantitatively analyse the attitudes of music fans and non-music fans towards a number of topics related to climate change in general and sustainability in the music industry specifically. This relies on survey responses from a representative YouGov UK panel, which can be used to provide a generalisable sample of the music fans within the UK population. A range of questions relating to the respondent's personal relationship to music, listening habits and purchasing habits are used to compare the attitudes of fans and non-fans on several important topics. These include opinions on climate change, desire for action on climate change both in general and in the music industry, knowledge of existing sustainability initiatives and readiness to change consumption habits. A range of demographic data was also collected in order to control for the effects of factors such as age and income.

The results clearly show that music fans place greater importance on climate change and desire more action from the music industry and society to address climate related issues. Despite poor knowledge of existing music industry initiatives around sustainability music fans show a desire to know more about these efforts. There is also some evidence that a significant proportion of music fans are willing to change their consumption habits to help reduce the impact of the music industry on the environment. This pattern of results broadly holds when looking at people who listen to music, people who spend money on music and people who claim music is important to them personally as well as respondents who fit into all of these categories, indicating robust empirical results.

THE SAMPLE

The YouGov panel is a nationally representative sample of respondents from across the UK.[1] This means that it includes people from across a range of social and demographic backgrounds, accounting for age, sex, class and geographic location. A representative sub-sample of the panel answered the survey, with further weighting applied to ensure nationally representative results reflecting the demographic makeup of the UK. Respondents were not selected and did not self-select to answer the survey based on their interest in music or membership of any particular social, cultural or professional group. This means that the sample includes respondents with a range of relationships to music, including music fans (however defined), non-fans and different kinds of fans. Therefore, we can make interesting comparisons about the attitudes of music fans versus the attitudes of non-music fans across the UK as relates to climate change and sustainability.

The sample size is 2184 people, which is sufficient to draw inferences about both the general population and music fans. However, there are some limitations to note. Firstly, while different geographic regions are recorded (e.g. Scotland, London), a sub-sample from a sample is likely to be less representative for a number of reasons. For example, weighting of respondents to account for age differences is calculated at the national (UK) level, which would not account for the London's lower population age or Scotland's higher age as compared to the sample as a whole. This means while we can look at results for a specific nation or region in the UK, we should be cautious about drawing any conclusions. Secondly, the small numbers sampled for some demographic groups means that results focusing on them are not likely to be robust. However, this is not a major problem as it is not of primary interest to this study.

DEFINING MUSIC FANS, LISTENERS AND CONSUMERS

This paper primarily compares music fans to non-music fans. However, there are various different possibilities for defining music fandom based on the survey questions. This includes the respondent's own feelings on the importance of music to themselves, the respondent's

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[1] See https://yougov.co.uk/about/panel-methodology/ for a discussion of the panel and methodology.

listening habits in terms of how many hours they spend listening to music, and whether the respondent spends money on products related to music. These will be referred to as “fans”, “listeners” and “consumers” throughout this paper, with all three definitions being used to illustrate the robustness of the empirical results. However, all three definitions arguably capture music fandom in different ways.

The way this paper defines fans is to use the questions “How important, if at all, is music to you personally”? and “How important, if at all, is music to your daily routine?” If a respondent answer “very important” or “important” to both of these questions then they are considered to be a music fan. If a respondent answers “not very important”, “not at all important” or “don’t know” to either of these questions then they are considered a non-music fan. This provides a sample consisting of 1082 fans and 1102 non-fans. This definition will be used throughout the rest of this paper. However, it is important note that both more and less stringent definitions of music fan were used, with broadly similar statistical results across all topics.

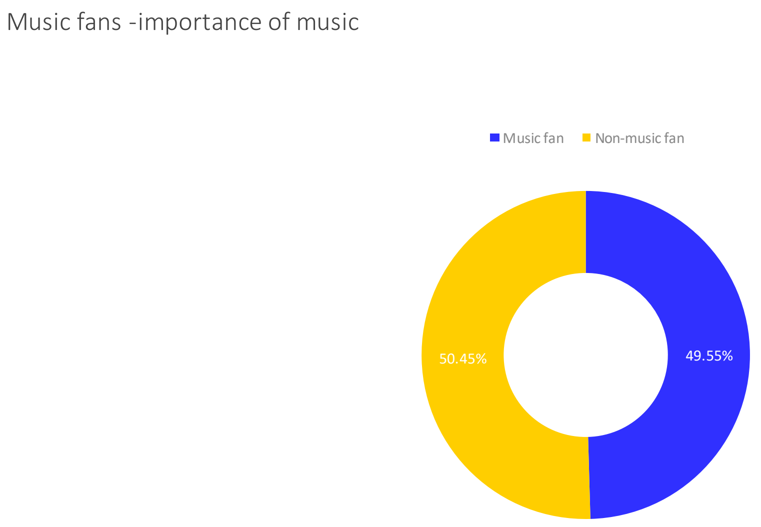


Figure 1: Proportion of music fans and non-fans

This approach relies on indirect self-indentation rather than asking “are you a music fan”, which could lead to confusion over the definition of “fan”. Other methods available would be to define music fandom based on either the number of hours spent listening or the amount of money spent on music products and services. We define a music listener as someone who listens to an average of 5 or more hours of music a week. This provides a sample of 1,130 music listeners and 1054 non-listeners[2]. We also measure whether people spend any money on any music product, with 947 consumers and 938 non-consumers. We also look specifically at whether respondents spend more than £5 in the average month on live events and on physical music products in order to examine specific questions around willingness to change spending habits.

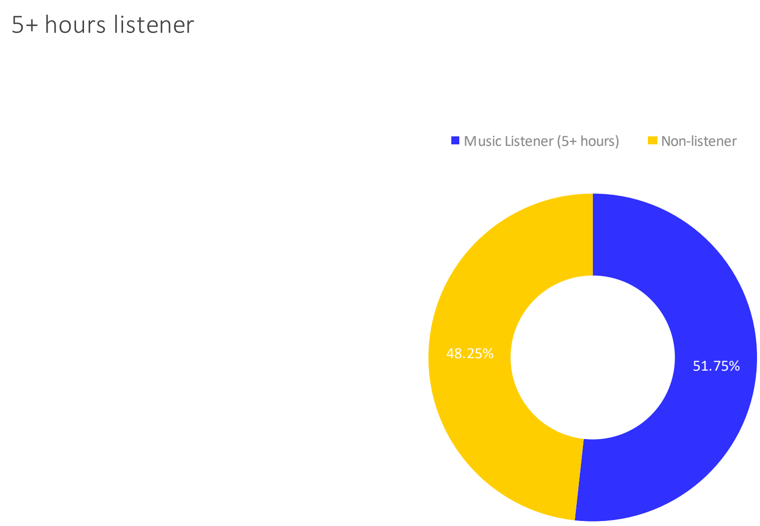


Figure 2: Proportion of music listeners and non-listeners

[2] This group of non-listeners also includes the 46 respondents who answered "Don't know/can't recall" to this question.

Music consumers -£1 any consumption

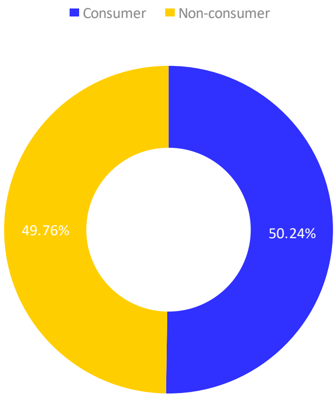


Figure 3: Proportion of music consumers and non-consumers

While these definitions are imperfect, they do allow for clear comparisons in the attitudes of between music fans/listeners/consumers and non-fans, with the representativeness of the overall survey sample meaning that these results should be generalisable to the British public.

Does the extent of engagement with music affect opinions more?

The results above focus on comparing the attitudes of fans, listeners or consumers to non-fans, non-listeners and non-consumers. This is interesting in terms of identifying whether fans, listeners, or consumers care more about certain environmental issues than non-fans. However, it does not allow us to draw any conclusions about whether the *extent of fandom* or *degree of engagement* affects opinions around the same issues. For example, are fans who are more engaged in music even more likely to care about climate change than fans who are less engaged in music? For some questions, such as number of hours spent listening, it would be possible to rank fans based on their answers. For example, some fans listen to 5 or more hours, others listen to 10 or more hours, others listen to 15 or more hours, etc. However, this is likely to raise demographic issues, as some demographic groups may have more or less disposable time and money. Therefore, it is arguably preferrable to look at whether fans who engage in multiple different types of music fandom/activity have different attitudes to those who only engage in one type of fandom. For example, do people who identify music as important AND listen regularly AND spent money on music care more about the environment than those who only identify it as important?

For the purposes of examining this potential difference we compare music fans (people who identify music as important to them personally and their daily routine, as defined above), music fans/listeners (who are both fans as defined above AND listen to at least 5 hours of music per week) and fans/listeners/consumers (who are fans and listeners as described above AND spent at least £1 a month on music). These definitions provide samples of 1085 fans, 832 fans/listeners and 503 fans/listeners/consumers, which are large enough to make meaningful comparisons. This does not necessarily capture whether someone is more or less of a fan, but it does provide a relatively objective way of capturing whether a respondent is more or less engaged with music on a regular basis.

RESULTS

Opinions on climate change

The data indicates that music fans are more concerned about climate change and feel more strongly about addressing climate change than non-music fans. The table[3] below shows the response to the question "how concerned are you, if at all, about the impacts of climate change?" Results indicate that 42% of music fans are "very concerned" about climate change as compared to 31% of non-music fans. The net scores for concerned vs. not concerned show that 82% of music fans are concerned about climate change as compared to 72% of non-music fans. These results are statistically significant at a <0.001 level. While the general population (i.e. column "all" in Figure 4) is concerned about climate change overall, music fans are more likely to be concerned and are more likely to be "very concerned" as opposed to "fairly concerned."

[3] P-values are colour coded in these tables with a key below each. The colour indicates the direction of the relationship while the strength of colour shows the significance level.

Concerned about impacts of climate change

Music Fan

	Music Fan		
Concerned about impacts of climate change	Music fan	Non-music fan	All
Very concerned	42%	31%	36%
Fairly concerned	40%	41%	41%
Not very concerned	11%	17%	14%
Not at all concerned	7%	8%	7%
Don't know	1%	2%	2%
Net: Concerned	**82%**	**72%**	**77%**
Net: Not concerned	**17%**	**25%**	**21%**
Unweighted N	1085	1099	2184

p<.001 p<.01 p<.05 p<.10 p<.10 p<.05 p<.01 p<.001

Figure 4: Music fans more concerned about impacts of climate change than non-fans

It is also worth noting that when we look at respondent who listened to music and spent money on music in addition to identifying music as important the results become even more pronounced, with 46% or music fans/listeners/consumers responding that they are "very concerned" about climate change.

Concerned about impacts of climate change

Fan/listener/consumer

	Fan/listener/consumer		
Concerned about impacts of climate change	Fan/listener/consumer	Other	All
Very concerned	46%	36%	38%
Fairly concerned	41%	40%	40%
Not very concerned	7%	16%	13%
Not at all concerned	6%	8%	8%
Don't know	0%	1%	0%
Net: Concerned	**87%**	**76%**	**79%**
Net: Not concerned	**13%**	**24%**	**21%**
Unweighted N	504	1395	1899

p<.001 p<.01 p<.05 p<.10 p<.10 p<.05 p<.01 p<.001

Figure 5: Fans/listeners/consumers more concerned about climate change

The pattern is similar when looking at people who listen to 5 or more hours of music each week. For example, music listeners are more likely to agree with the statement that view the current environmental situation as a climate emergency. 67% of music listeners say that the situation should be described as a climate emergency as opposed to 60% of non-listeners.

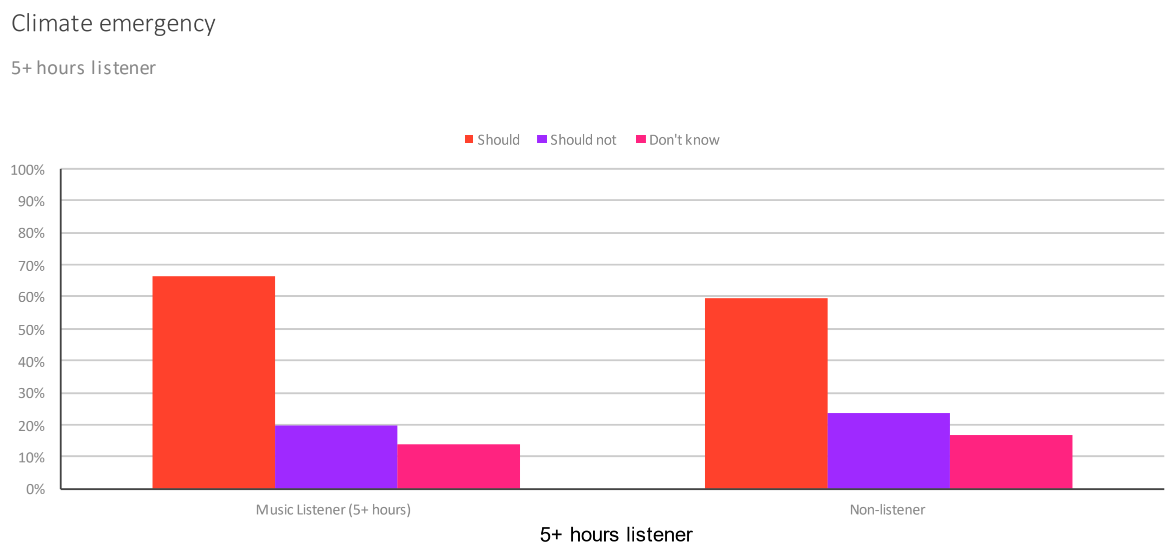


Figure 6: Listeners more likely to view situation as climate emergency

Overall, the results from this survey suggest that while the British public views climate change as a serious issue overall, music fans are more likely to see it as such.

Desire for action on climate change

In addition to being more likely to view climate change as a serious issue, results also show music fans as being more likely to place a priority on efforts to tackle climate change. While both music fans and non-fans tend to see climate change as an important issue which should be addressed, the table below shows that music fans are significantly more likely to view it as a top priority with 54% of music fans agreeing that "tackling climate change should be a top priority now, above other issues" as compared to 47% of non-fans. These results are statistically significant at a <0.001 level.

Tackling climate change

Music Fan

	Music Fan		
Tacking climate change	Music fan	Non-music fan	All
Tackling climate change should be a top priority now, above other issues	54%	47%	50%
Tackling climate change should be a priority at some point in the future, but there are other issues that that should take priority now	34%	37%	35%
Tackling climate change is not a priority anyway	8%	10%	9%
Don't know	5%	7%	6%
Unweighted N	1085	1099	2184

p<.001 p<.01 p<.05 p<.10 p<.10 p<.05 p<.01 p<.001

Figure 7: Music fans more likely to prioritise tackling climate change

This pattern remains the same when looking at listening habits rather than the importance of music to each respondent.

Tackling climate change

5+ hours listener

	5+ hours listener		
Tacking climate change	Music Listener (5+ hours)	Non-listener	All
Tackling climate change should be a top priority now, above other issues	54%	46%	50%
Tackling climate change should be a priority at some point in the future, but there are other issues that that should take priority now	32%	39%	35%
Tackling climate change is not a priority anyway	8%	9%	9%
Don't know	5%	6%	6%
Unweighted N	1107	1077	2184

p<.001 p<.01 p<.05 p<.10 p<.10 p<.05 p<.01 p<.001

Figure 8: Music listeners more likely to prioritise tackling climate change

Knowledge of music industry initiatives on climate change

The music industry has seen a number of initiatives aimed at increasing awareness of climate issues and addressing the environmental impact of the music events and products. This survey tested the knowledge of these initiatives as well as the desire to hear more about them. Interestingly, even among music fans the knowledge of these initiatives was low. 64% of music fans had not heard of any music industry initiatives, with only 3% saying they knew a lot about such initiatives.

Awareness ofclimate-related initiatives in music industry

Music Fan

	Music Fan		
Awareness of climate -related initiatives in music industry	Music fan	Non-music fan	All
I had heard about them, and know a lot about them	3%	2%	2%
I had heard about them, and know something about them	16%	9%	12%
I had heard about them, but know nothing about them	17%	12%	15%
I had not heard about them	64%	78%	71%
Unweighted N	1085	1099	2184

p<.001 p<.01 p<.05 p<.10 p<.10 p<.05 p<.01 p<.001

Figure 9: Fans and non-fans have low awareness of climate initiatives

Even among respondents who listened to 20 or more hours of music a week the knowledge of these initiatives was extremely low, indicating that even regular listeners and dedicated fans are not likely to be very familiar with music industry initiatives around climate change.

Awareness of climaterelated initiatives in music industry

20+ hours listener

	20+ hours listener		
Awareness of climate -related initiatives in music industry	20+ hours listener	<20 hours listener	All
I had heard about them, and know a lot about them	5%	2%	2%
I had heard about them, and know something about them	13%	12%	12%
I had heard about them, but know nothing about them	15%	15%	15%
I had not heard about them	67%	71%	71%
Unweighted N	239	1945	2184

p<.001 p<.01 p<.05 p<.10 p<.10 p<.05 p<.01 p<.001

Figure 10: Frequent music listeners still have poor knowledge of climate initiatives

Fans/listeners/consumers similarly also see themselves as having generally low knowledge of current climate initiatives, although the proportion of fans/listeners/consumers not heard of current initiatives drops to 59%.

Awareness of climaterelated initiatives in music industry

Fan/listener/consumer

	Fan/listener/consumer		
Awareness of climate -related initiatives in music industry	Fan/listener/consumer	Other	All
I had heard about them, and know a lot about them	3%	1%	2%
I had heard about them, and know something about them	18%	9%	12%
I had heard about them, but know nothing about them	20%	13%	15%
I had not heard about them	59%	77%	72%
Unweighted N	504	1395	1899

p<.001 p<.01 p<.05 p<.10 p<.10 p<.05 p<.01 p<.001

Figure 11: Fans/listeners/consumers also have poor knowledge of climate initiatives

Even when prompted with the names of 14 specific initiatives[4] most music fans were not familiar with them. The following graph shows the top 5 most recognised music initiatives, which are relatively unknown even by music fans. "Plastic bottle bans at festivals" was only recognised as an initiative by 27% of music fans, while 47% of fans recognised "none of these."

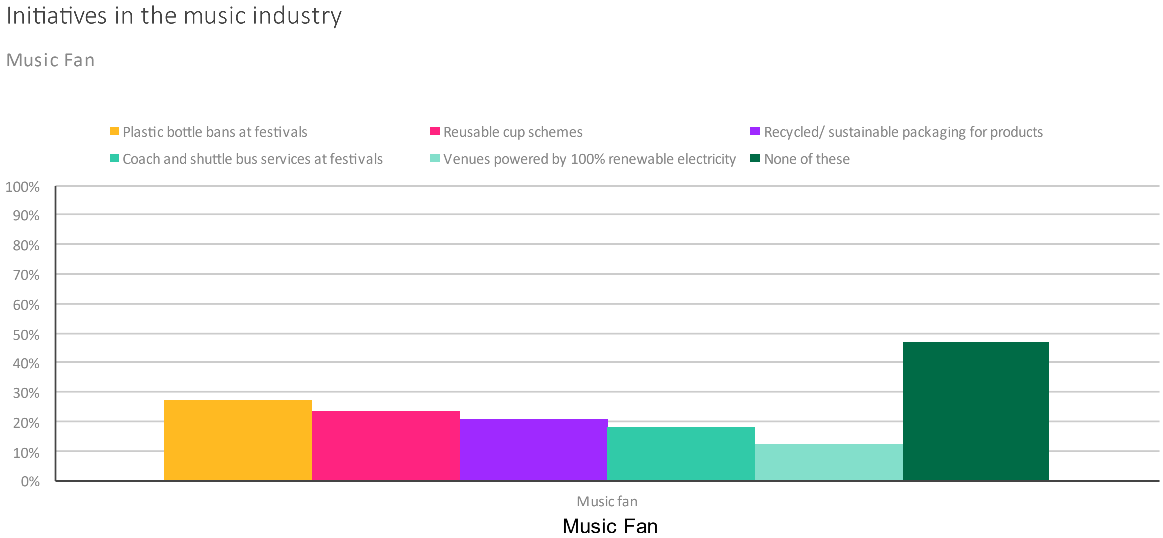


Figure 12: Climate initiatives have low recognition among music fans

While knowledge of existing initiatives is low even among music fans, there is evidence of a desire to hear more. As shown below 58% of music fans answered that they would be 'very' or 'fairly' interested in hearing more about steps the music industry is taking to tackling climate change, as compared to 36% who were not interested.

[4] The initiatives listed in the survey were: Recycled vinyl; Recycled / sustainable packaging for products; Reusable cup schemes; Car sharing schemes for festivals; Coach and shuttle bus services at festivals; Plastic bottle bans at festivals; Dinked vinyl sold at reduced cost; Sustainable certified merchandise; Carbon offsetting donations; Venues powered by 100% renewable electricity; Kinetic dancefloors; Music Climate Pact; Music Declares Emergency; Julie's Bicycle

Interested in hearing more

Music Fan

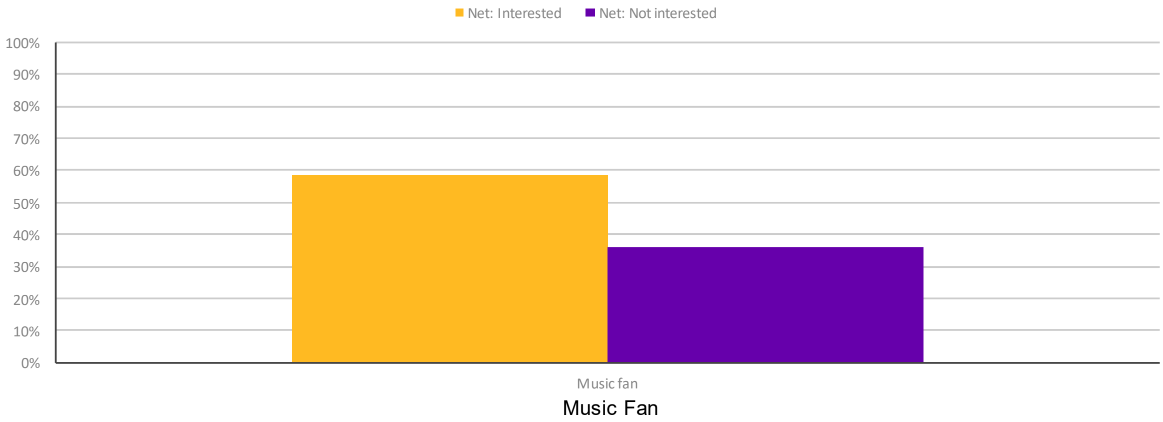


Figure 13: Majority of music fans are interested in hearing more

Overall, the results suggest that knowledge of current initiatives by the music industry to address climate change is low, both among the general public and fans. However, there is significant interest from music fans in hearing more about current and future initiatives.

Desire for action on music industry action on climate change

In addition to wanting to know more about music industry initiatives, many music fans are keen to see the music industry take action to address climate change. As shown below, 44% of music fans believe that “the music industry should do everything necessary and urgently” to address climate change, as compared to 38% of non-music fans. These results are significant at a <0.05 level. However, it is worth noting that even among music fans 18% of respondents answered “don’t know” to this question.

What the music industry should do about climate change

Music Fan

What the music industry should do about climate change	Music Fan: Music fan	Non-music fan	All
The music industry should do everything necessary and urgently	44%	38%	41%
The music industry should act slowly, while it learns more about what to do	27%	23%	25%
The music industry is doing enough	7%	4%	5%
The music industry should do nothing	5%	6%	5%
Don't know	18%	29%	24%
Unweighted N	1085	1099	2184

p<.001 p<.01 p<.05 p<.10 p<.10 p<.05 p<.01 p<.001

Figure 14: Music fans more likely to support urgent action from music industry

When looking at fans/listeners/consumers the pattern is broadly similar, although there is some evidence that people who engage with music in more ways are more likely to see climate action as a priority. For example, for both fans and for fans/listeners/consumers only 5% say that the music industry should do nothing. However, fans/listeners/consumers are 4% more likely to say that the music industry should do everything necessary and urgently.

What the music industry should do about climate change

Fan/listener/consumer

What the music industry should do about climate change	Fan/listener/consumer: Fan/listener/consumer	Other	All
The music industry should do everything necessary and urgently	48%	41%	43%
The music industry should act slowly, while it learns more about what to do	28%	24%	25%
The music industry is doing enough	6%	5%	5%
The music industry should do nothing	5%	6%	5%
Don't know	12%	25%	22%
Unweighted N	504	1395	1899

p<.001 p<.01 p<.05 p<.10 p<.10 p<.05 p<.01 p<.001

Figure 15: Fans/listeners/consumers more likely to support action from music industry.

When looking at specific types of actions which the music industry could take a clear majority of music fans saw it as important that artists should speak out about climate issues, that music businesses should speak out about climate issues and that the music industry should take action to reduce its own environmental impact. There was a similar picture when looking at music listeners.

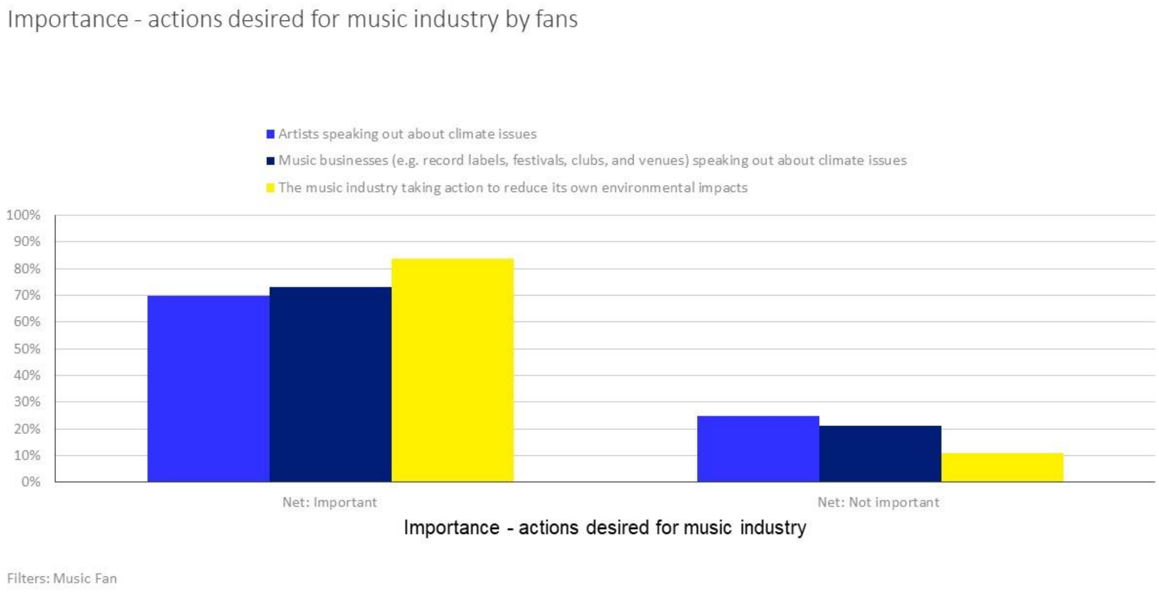


Figure 16: Majority of fans see all actions by music industry as important

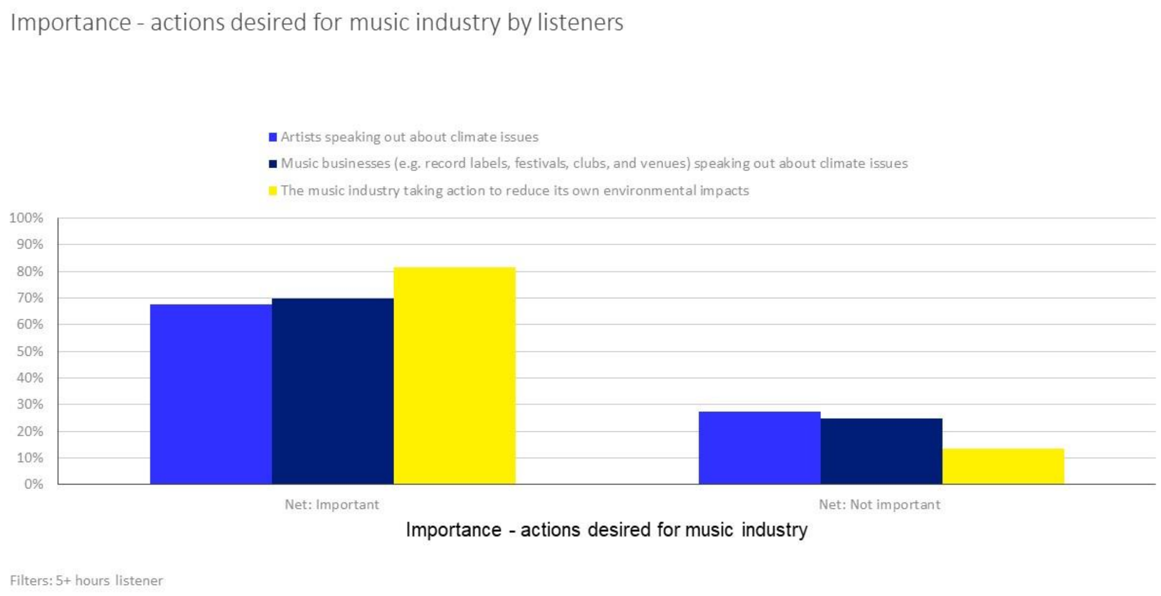


Figure 17: Majority of listeners see all actions by music industry as important

Although fans and listeners support more action across all of the options presented there is a larger proportion in favour of the music industry reducing its own environmental impact. This action is seen as important even among a majority of non-music fans, suggesting that actions which take practical steps to reduce the impact of musical events and products may find more support than those which focus only on speaking about wider climate issues, both among fans and non-fans.

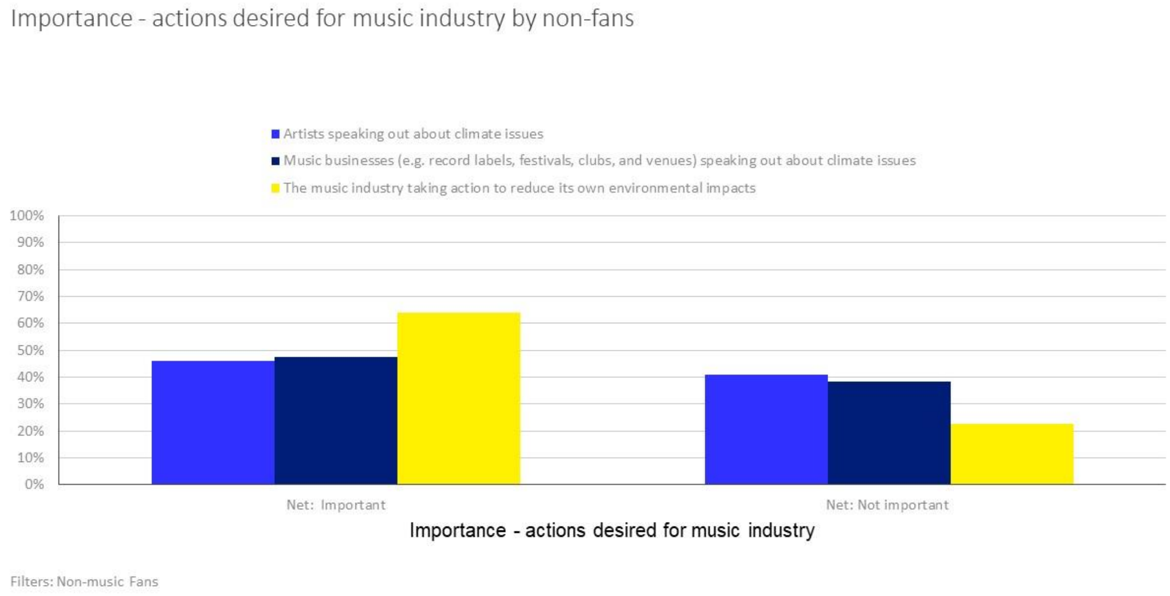
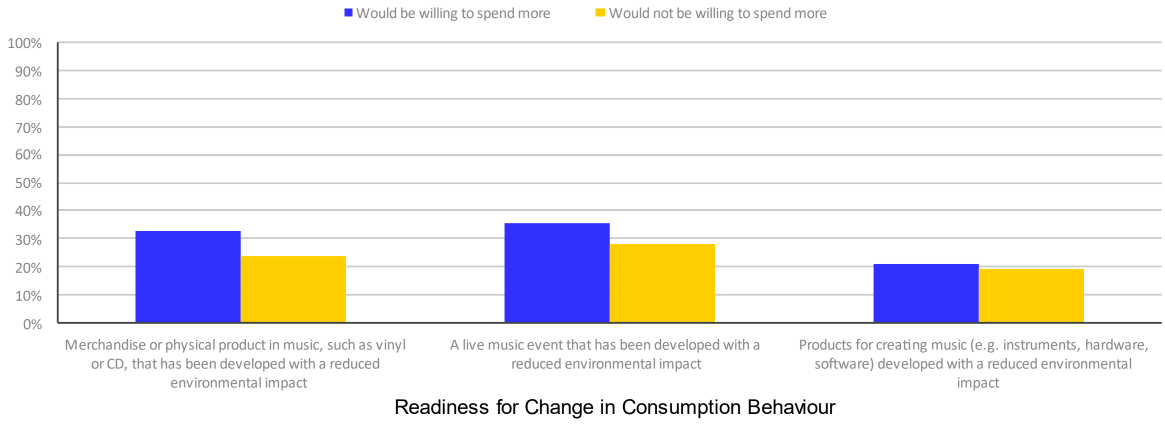


Figure 18: Non-fans place more importance on music industry reducing its own environmental impact

Readiness to change consumption behaviour

In order to assess the willingness of respondents to change their spending habits in order to reduce the environmental impact of the music industry it is more useful to focus on the specific sub-sample of respondents who spend money on music, rather than those who listen to music or identify with music being important to them. The results suggest that, after excluding the substantial number of respondents who chose NA or don't know answers, more respondents indicated a willingness to spend more on a range of products including physical products (such as records and merchandise), live events and music creation equipment.

Readiness for Change in Consumption Behaviour consumers, ex NA



Filters: £1 any consumption

Figure 19: Majority of consumers willing to spend more on all products when excluding NAs

It is also worth again comparing the attitudes of fans to the attitudes of fans/listeners/consumers. Here, we see a large gap in willingness to spend more, with fans who listen to music regularly and buy music-related products being significantly more likely to say they are willing to spend more on a range of products.

Readiness for Change in Consumption Behaviour | Would be willing to spend more

Fan/listener/consumer

Would be willing to spend more	Fan/listener/consumer		
Readiness for Change in Consumption Behaviour	Fan/listener/consumer	Other	All
Merchandise or physical product in music, such as vinyl or CD, that has been developed with a reduced environmental impact	40%	20%	25%
A live music event that has been developed with a reduced environmental impact	41%	21%	26%
Products for creating music (e.g. instruments, hardware, software) developed with a reduced environmental impact	26%	13%	16%
Unweighted N	504	1395	1899

p<.001 p<.01 p<.05 p<.10 p<.10 p<.05 p<.01 p<.001

Figure 20: Fans/listeners/consumers more willing to spend more money on more sustainable musical products.

However, it is also important to consider whether people who specifically spend money on certain products are willing to spend more on those products. For example, are people who attend live music events willing to spend more for events with a reduced environmental impact? The results suggest that this is the case. Firstly, respondents who spend £5 or more in the average month on physical products indicate that they are willing to spend more on all forms of music than people who do not spend this amount of money on physical products. The gap between willingness to spend more is most pronounced with physical products, with a 23% gap between physical product consumers and non-consumers. This suggests that people who spend money on products such as records are also the most likely to be willing to spend more money to reduce the environmental impact of record production.

Readiness for Change in Consumption Behaviour | Would be willing to spend more

£5 physical products

Would be willing to spend more	£5 physical products		
Readiness for Change in Consumption Behaviour	Physical Product Consumer	Non-consumer	All
Merchandise or physical product in music, such as vinyl or CD, that has been developed with a reduced environmental impact	43%	20%	24%
A live music event that has been developed with a reduced environmental impact	36%	23%	25%
Products for creating music (e.g. instruments, hardware, software) developed with a reduced environmental impact	24%	14%	16%
Unweighted N	293	1493	1786

p<.001 p<.01 p<.05 p<.10 p<.10 p<.05 p<.01 p<.001

Figure 21: Physical products consumers especially likely to be willing to spend more on physical products

There is a similar picture when looking at live events consumers. Respondents who spend £5 or more on live events in the average month are also more likely to be willing to spend more on all forms of musical products. However, in this case the largest gap between consumers and non-consumers is willingness to spend more on live events, with a 29% gap. This strongly suggests that people who spend more on specific musical products are more likely to be willing to spend more on those products.

CONCLUSIONS

Overall, the data suggests that there is a strong appetite among music fans for greater engagement with and discussion of climate issues within the music industry. Compared to non-music fans, music fans are both more concerned about climate change in general and expect the music industry to do more. These results are robust when using different definitions of music fandom, including when looking at people who listen to music and who consume music products. While knowledge of existing initiatives is low, music fans show an interest in both learning more and in changing their own consumption habits.

The results tend to be most pronounced when looking at the group of respondents who identify music as important to them and listen and spend money on music. This may suggest that regular consumers are driving the overall tendency of music fans to care more about environmental issues. However, a better interpretation may be that people who engage with music more by consuming and interacting with it in multiple ways are more likely to care about the environment. This requires more development and investigation.

The disconnect between current knowledge of sustainability initiatives and desire to hear more and between current consumption behaviour and willingness to spend more suggests that some music consumers are willing to support and participate in changes to promote sustainability in the music industry, but currently lack the knowledge about the best ways to do so.

ACKNOWLEDGEMENT

This survey was made possible thanks to funding from the Natural Environment Research Council (NERC), which is part of UK Research and Innovation (UKRI). The University of Glasgow, Music Declares Emergency, the BPI, Secretly Group, Beggars Group, Involved Group, and Key Production have partnered on this new piece of audience research.

The findings of this report are based on a nationally representative panel survey conducted by YouGov UK in 2022 (Source: YouGov 2022 © All Right Reserved).

APPENDIX

APPENDIX 1: List of Survey Questions

APPENDIX 2: Infographic for social media