

Sound and Sustainability

Findings from Key Production
Sustainability Surveys 2024

Contents

Executive Summary.....	3
Materiality Assessment / Stakeholder Survey – Main Issues	4
The Kids Are Alright: Gen Z Embracing the Analogue Music Experience.....	5
Shift Towards Sustainability	6
Perception of Additional Value: Heavyweight Vinyl Records.....	8
Additional Findings	9
About Key Production Group	12

Compiled by John Service.

Key Production gratefully acknowledges the input provided by organisations and individuals who responded to our surveys. Thanks also go to Maren Landsnes, Sam Egarr, Sue Armstrong, Lou Cacciatore, Joe Pursglove and Leeds University Business School, Reuben Hunt, Kevin Callus, Lucy Constable & Statista.

© 2024 KEY PRODUCTION (LONDON) LIMITED

No part of this report may be reproduced in any form without written permission from the copyright owner. For more information, visit [keyproduction.co.uk](https://www.keyproduction.co.uk)



Executive Summary

This report explores the growing demand for sustainable practices within music manufacturing, based on surveys conducted by Key Production Group. The surveys targeted a nationally representative sample of music consumers in the UK, alongside consultations with industry stakeholders. ⁽¹⁾

Key findings reveal a significant shift in consumer preferences towards more eco-friendly music formats, particularly among younger generations. Despite the popularity (and pricing) of vinyl, a large majority of respondents are willing to pay a premium for records made with reduced environmental impact. The research also suggests a potential disconnect between the industry's take on heavyweight vinyl and consumer priorities, with most listeners not perceiving a significant value difference between 140g and 180g records.

The report highlights actionable opportunities for the music industry to embrace sustainable practices. These include:

- exploring alternative materials for record production
- rethinking the use of heavyweight vinyl
- prioritising energy-efficient manufacturing processes

By aligning with these evolving consumer preferences, we can ensure a thriving and environmentally responsible industry.

Materiality Assessment / Stakeholder Survey – Main Issues

Our initial Materiality Assessment survey garnered responses from a range of stakeholder groups including record labels, music consumers, distributors, manufacturers, industry bodies and record shops. The main issues highlighted were:

Environmental & Governance Issues

- Waste Production
- Greenhouse Gas (GHG) Emissions
- Natural Resource Preservation

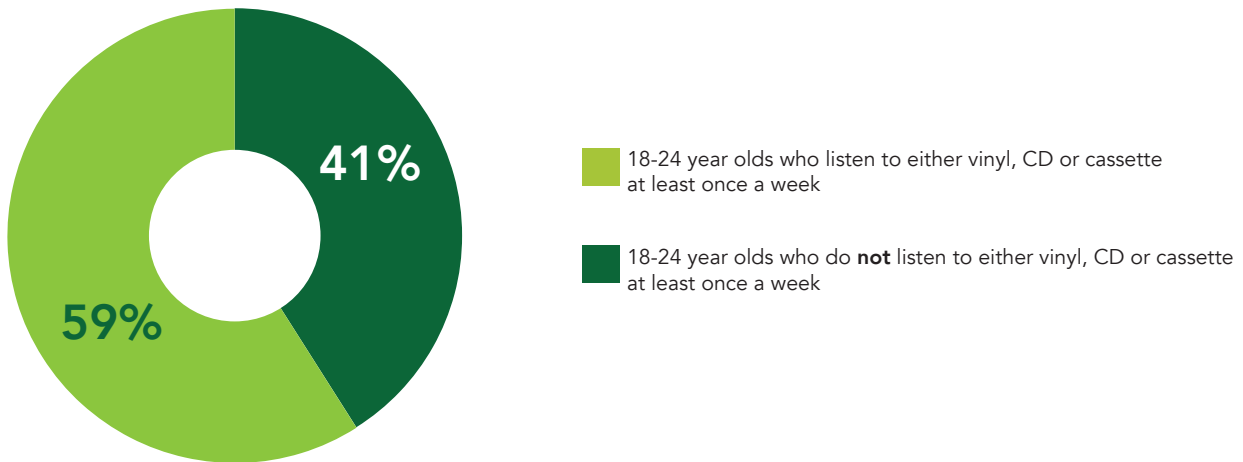
Social Issues

- Fair Labour Practices
- Diversity & Equity
- Work/Life Balance



The Kids Are Alright: Gen Z Embracing the Analogue Music Experience

59% of Gen Z listen to either vinyl, CD or cassette at least once a week



- CD purchases also recorded highest amongst youngest age range

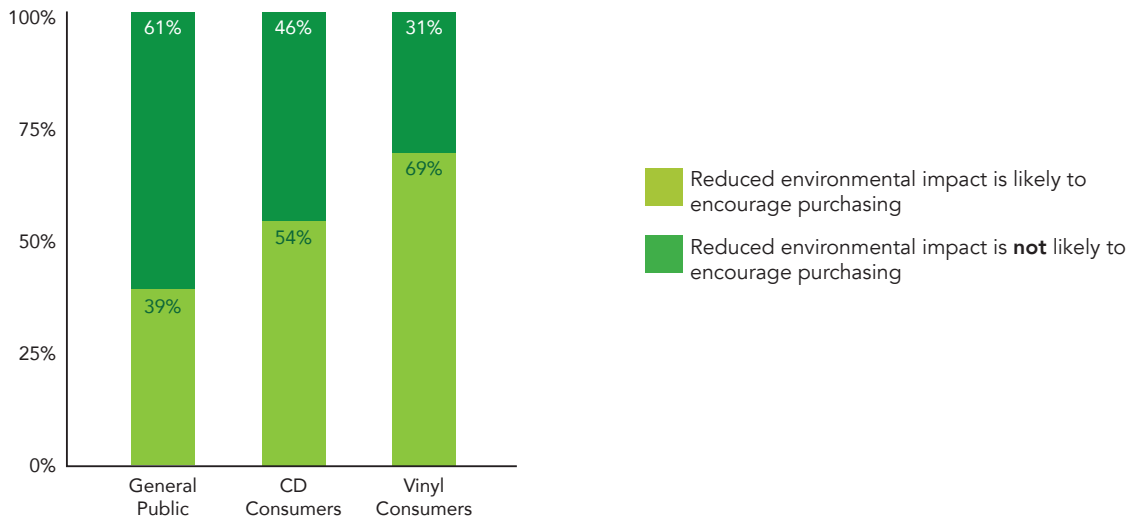
This insight into the younger generations' music consumption (which puts their usage of physical media higher than any other age group) follows the annual reports from the British Phonographic Industry (BPI)⁽²⁾ and the Digital and Entertainment Retail Association (ERA)⁽³⁾ which revealed that physical music sales continue to grow in the UK, with vinyl sales increasing for a 16th consecutive year and CD reporting its best year in 20 years.

This latest research supports the ongoing trend of physical music popularity - but shows that it's not just older generations listening to and buying physical music.

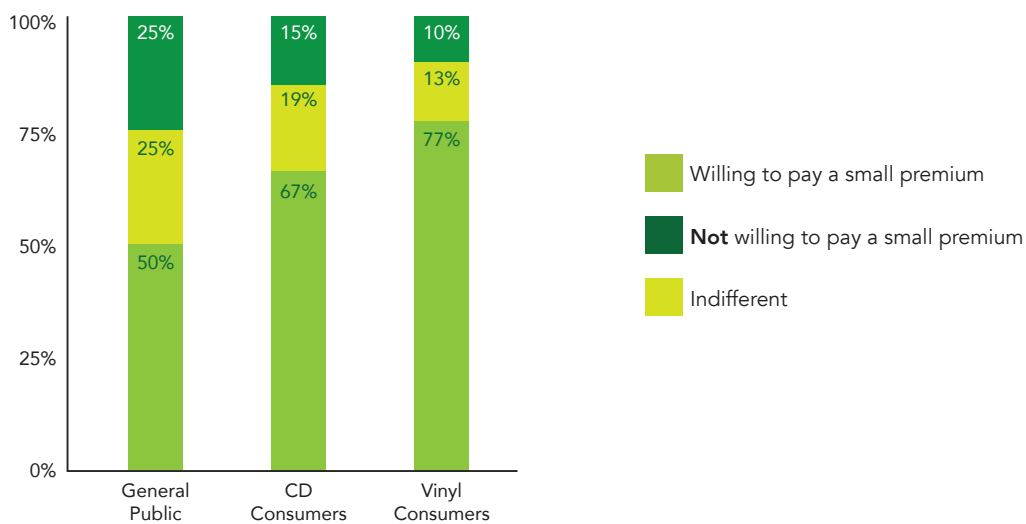


Shift Towards Sustainability - Music Fans Would Buy More Records If Made More Sustainably

Likelihood to Encourage Increased Purchasing - Reduced Environmental Impact



Willingness to pay a premium for reduced impact music products

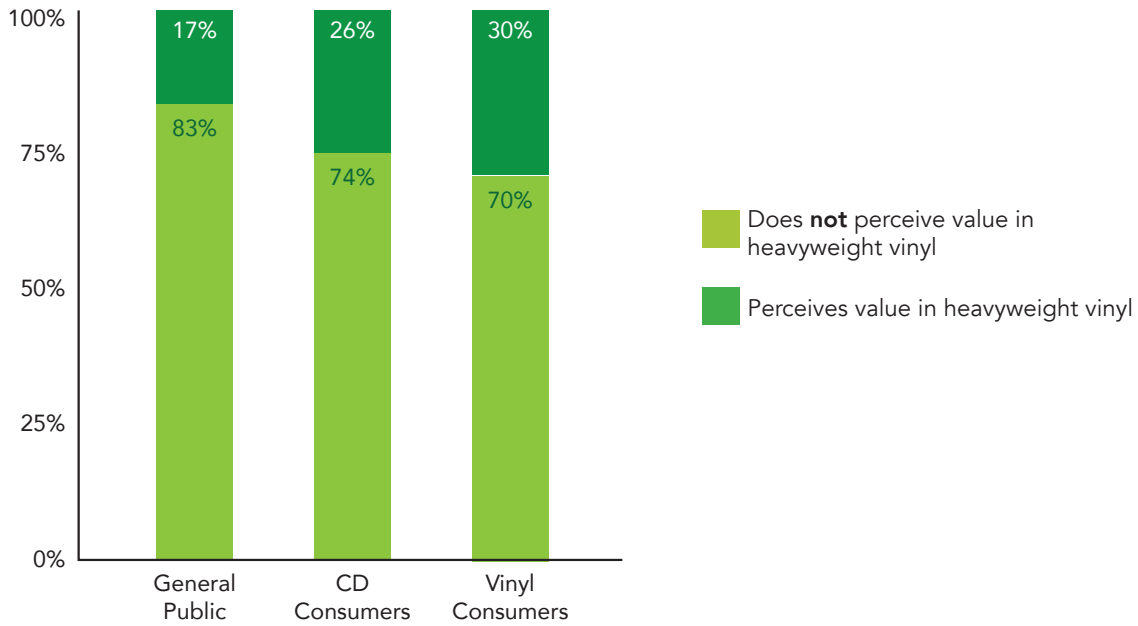


71% of Gen Z are willing to pay a small premium on buying Vinyl LPs if the records were to be produced with a proven reduced impact on the planet



Perception of Additional Value of Heavyweight Vinyl Records

The survey provided some compelling insight into consumers' perception of the value of heavyweight vinyl. 180g vinyl is often distributed as a more high-end and valuable product, due to its increased heft and perceived richer audio quality. In reality, the fractional playback quality improvements with heavyweight vinyl can only be appreciated with very high-end technical equipment that only a very small number of consumers possess.



Consumers therefore do seem to perceive more value in reduced impact than in heavyweight vinyl. We would suggest these findings could underscore a shift in consumer preferences towards more sustainable and environmentally friendly options in the music industry, it's now more crucial than ever for the industry to listen and adopt more sustainable methods.

From an environmental perspective, 140g vinyl should be promoted as the industry standard for example. Its lighter weight reduces emissions throughout the production and distribution process, from pressing to shipping, making it a more sustainable choice compared to heavier alternatives.



Additional Findings:

Shrinkwrap

Finding an alternative to traditional shrinkwrap is still seen as being of importance for all of our stakeholders. As an industry we are pushing for developments in this area within the supply chain. It is important to note that shrinkwrap is recyclable (with flexible plastics, for e.g. with shopping bags in the UK). The recently published "Vinyl Record Industry: First Carbon Footprinting Report"⁽⁴⁾ also highlights the fact that there are other areas of vinyl manufacturing with greater potential for emissions reduction, much of which are covered in our findings here also.

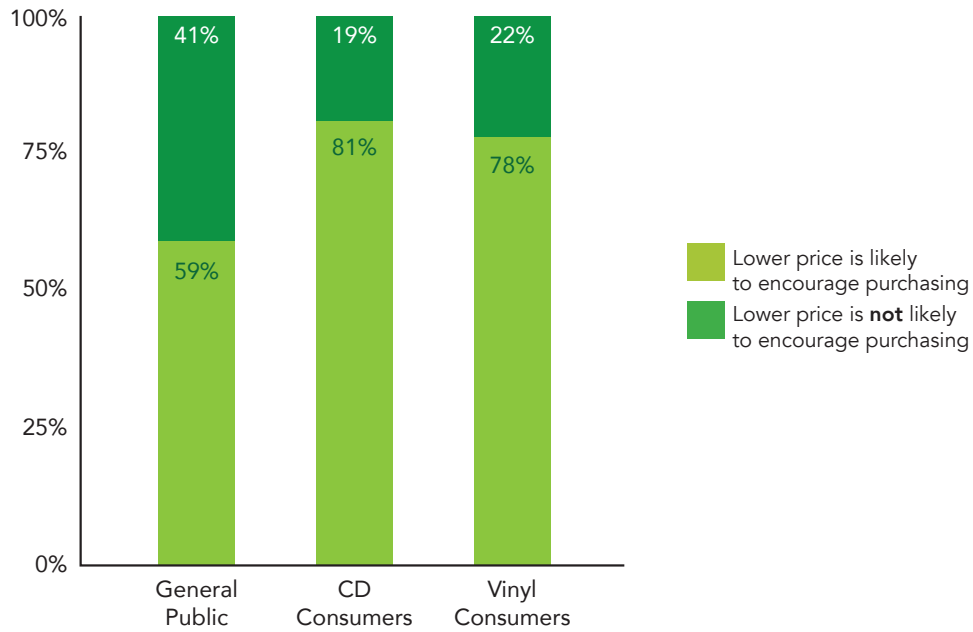
Most music products are shrinkwrapped to reduce damage in transit and retail, with many distributors requiring some form of outer protection on items. It can be argued that not shrinkwrapping product in fact results in more waste due to the greater return of damaged stock. Many new shrinkwrap materials are either now available or in development, from biodegradable and compostable films to material with bio-attributed sources. There are also longer-lasting alternatives such as a PVC or PET outer sleeves which can be considered, or a Belly-Band to authenticate that the product is new.

Streaming

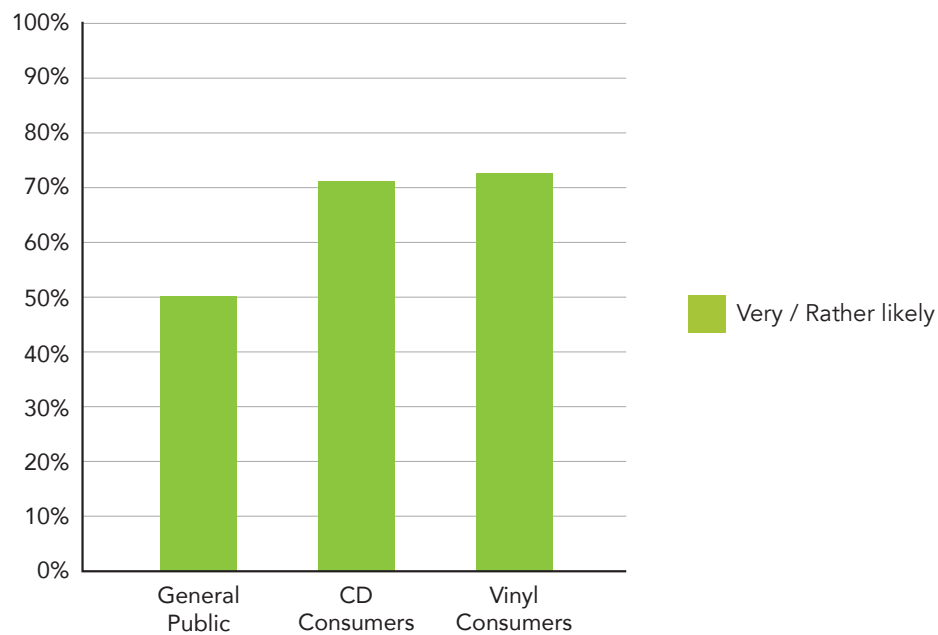
Looking at the survey results around the perceived sustainability of digital and physical music formats, both record labels and music consumers saw digital formats as generally more sustainable than physical formats. This is despite the fact that streaming has a huge carbon footprint. Looking at the bigger picture of the cloud in general, a recent study from MIT's Stephen A. Schwarzman College of Computing found that "the cloud" now has a greater carbon footprint than the airline industry. Explosive growth is expected in data storage infrastructures over the next decade, a tripling by some estimates.⁽⁵⁾ All music formats, along with touring and merch, do of course form part of a vital ecosystem to support artists & our industry and strides are being made in all areas to reduce impact.

Additional Findings

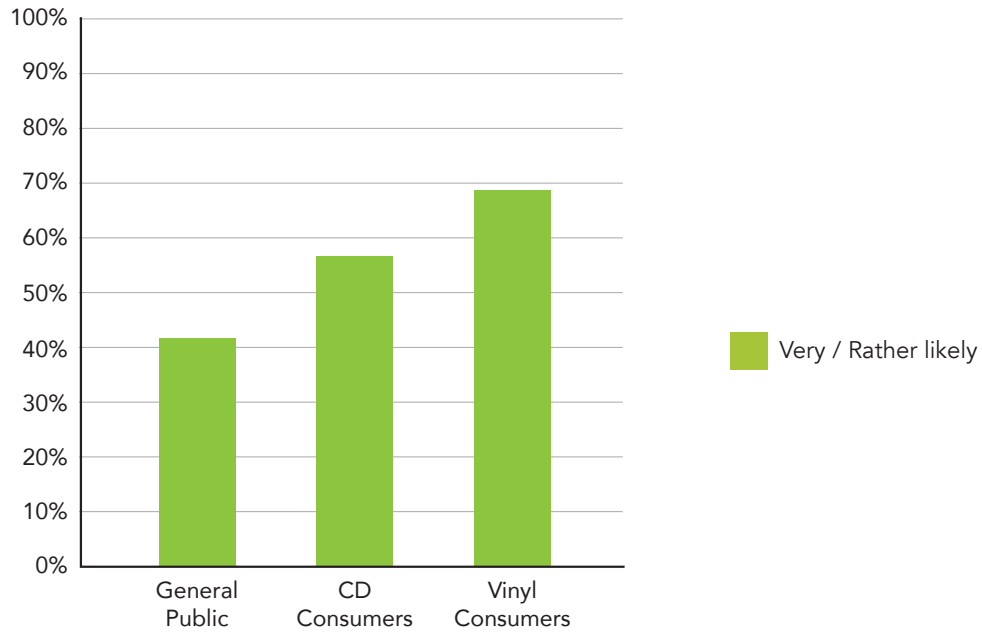
Likelihood to Encourage Increased Purchasing - Lower Price



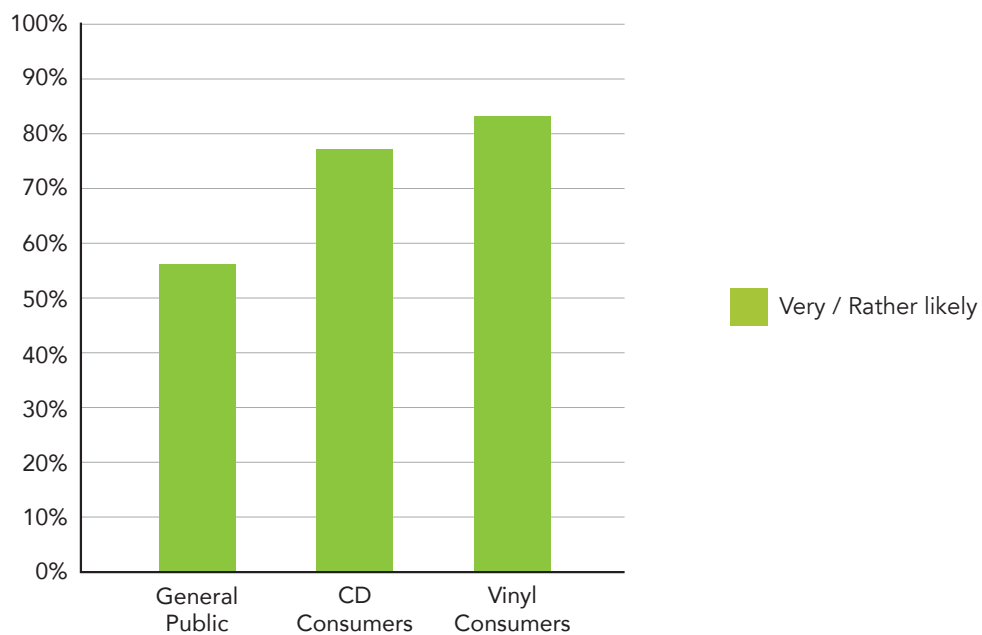
Likelihood to Encourage Increased Purchasing - Bonus Content



Likelihood to Encourage Increased Purchasing - Aesthetics / Packaging



Likelihood to Encourage Increased Purchasing - Limited Edition



ABOUT KEY PRODUCTION GROUP

Key Production uses its wide network across the supply chain, as well as the wider industry (from customers to industry-wide bodies), to push for improvements in sustainability within physical music production for vinyl, CDs, cassettes and DVDs. From certifying as a B Corp to encouraging a forum for suppliers to share best practices (from for e.g. energy efficiencies in manufacturing and on-site renewable energy solutions, to advocating for the uptake of renewable-attributed PVC compounds for its clients), Key are at the forefront of driving change in the industry.

Key Production Group offers end-to-end manufacturing solutions in vinyl, CD, DVD, Blu-ray, cassettes, print and bespoke packaging, working with major and independent record labels as well as individual artists in music, media and corporate sectors. With its knowledge and passion, Key Production Group creates unforgettable physical and audio experiences, striving to do so as sustainably as possible.

Founded in 1990, the London-based company is best known for its work with artists such as Nick Cave, Alt-J, IDLES, Little Simz, Ezra Collective, PJ Harvey and Raye on her Brit Award winning album - amongst many more.

Founded as Key Production, over time the company has been expanding and enriching its expertise and influence. Key Production Group now comprises Key Production, Think Tank Creative, Breed Media and MODO Design, with offices in London, Sheffield, Brighton and Europe. In 2023, Key Production Group achieved a B Corp certification.

Key Production Group press enquiries

- Reuben Hunt: reuben.hunt@dawbell.com
- Kevin Callus: kevin.callus@dawbell.com
- Lucy Constable: lucy.constable@dawbell.com

Notes

1. Survey conducted by Key Production Group between 27th February - 5th March 2024 and distributed UK nationwide. 503 base respondents.
2. <https://www.bpi.co.uk/news-analysis/bpi-s-new-yearbook-highlights-breadth-vibrancy-of-british-recorded-music-including-an-independent-sector-growing-for-a-sixth-consecutive-year>
3. <https://www.eraltd.org/yearbook>
4. Vinyl Record Industry: First Carbon Footprinting Report https://vinylalliance.org/wp-content/uploads/2024/06/First-Carbon-Footprint-report_VRMA_VA_30-May-2024_final.pdf
5. <https://www.sciencedirect.com/science/article/abs/pii/S0921344920307072?via%3Dihub>