



**INTERNATIONAL
ASSOCIATION OF
VENUE MANAGERS**

2019 Sustainability Survey



RESEARCH AND PRODUCTION

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The IAVM Sustainability Survey was initially developed in 2012 by the IAVM Sustainability Committee in conjunction with IAVM Research Committee. The survey has continued to grow and develop over the years under the guidance of these two groups that oversee their respective projects for the Association. The 2019 survey has been updated to be more inclusive of current industry trends and gathered input from the 2016, 2017, and 2018 Sustainability Committees. The final survey produced by Mercedes Hunt, PhD/ Director of Business Management & Finance Programs/ Senior Lecturer at Granite State College/ Owner of Map & Compass Consulting LLC and Timothy Trefzer, Manager of Corporate Social Responsibility (CSR) / Communications at the Georgia World Congress Center Authority.

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IAVM's Mission: To educate, advocate for, and inspire public assembly venue professionals, worldwide.

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EXECUTIVE SUMMARY OF KEY FINDINGS

IAVM's research continues to demonstrate the importance and relevance of environmental sustainability and sustainable practices to the venue industry.

- 78% of venues believe it is very important that their building to be environmentally friendly and 60% of upper management shares this sentiment.
- 93% of venues are implementing some sort of green practice in their buildings.

At the venues that have implemented green or sustainable practices:

- 49% of venues reported cost savings from implementing sustainable practices.
- 76% of venues reported to be doing more sustainable practices than they were 3 years ago.
- 54% of venues struggle with funding when implementing sustainability practices to their building.

We at IAVM define sustainability as the ability of public assembly facilities to fulfill client and industry needs whilst exercising environmental responsibility through use of green standards, application of technologies, processes, practices and related business implications – balancing the fulfillment of human needs, now and for generations to come, while enhancing the health of ecosystems and the ability of other species to survive in their natural environments.

METHODOLOGY

Using an online survey platform, the IAVM 2019 Sustainability Survey was conducted from February 5th through April 12th, 2019.

A total of 103 venues participated in this survey (42 Convention Centers, 17 Arenas, 7 Stadiums, 19 Performing Arts Centers, 4 Universities, 4 Amphitheaters/Fairgrounds, and 10 other types). The survey was made available to all members of IAVM and Green Sports Alliance (predominantly IAVM members). The sample characteristics of all participating venue types are shown below.

	Convention Centers	Arenas	Theater/Performing Arts Center	Stadium	University	Amphitheater/Fairground	Other Types
<i>Total</i>	42	17	19	7	4	4	10

<i>Size of Venue *</i>							
<i>Large</i>	16	5	9	5	1	1	2
<i>Medium</i>	19	10	8	2	0	1	6
<i>Small</i>	7	2	2	0	2	1	1
<i>Not Sure</i>	0	0	0	0	1	1	1

*= Size Definitions used for Venue Size Classification

NOTE: Complexes and other types were asked to compare themselves relative to venues that are the same type; no quantification was used.

Venue Type	Small	Medium	Large
Arena/Civic Center (number of seats)	<i>Up to 7,500</i>	<i>7,501 – 12,000</i>	<i>Over 12,000</i>
Stadium (number of seats)	<i>Up to 15,000</i>	<i>15,001 – 35,000</i>	<i>Over 35,000</i>
Theatre/Performing Arts Center (number of seats)	<i>Up to 1,500</i>	<i>1,501 – 2,500</i>	<i>Over 2,500</i>
Convention Center/Exhibit Hall (gross Sq. FT. of exhibit space)	<i>Up to 100,000</i>	<i>100,001 – 500,000</i>	<i>Over 500,000</i>

ANALYTICAL NOTES

1. In all charts and tables in this report, percentage totals may not add to 100% due to rounding.
2. Charts are shown for the *total sample of responding venues*. Differences by venue types are highlighted as needed.

Implications of the Research Findings

Written By: Dr. Mercedes Hunt

INTRODUCTION

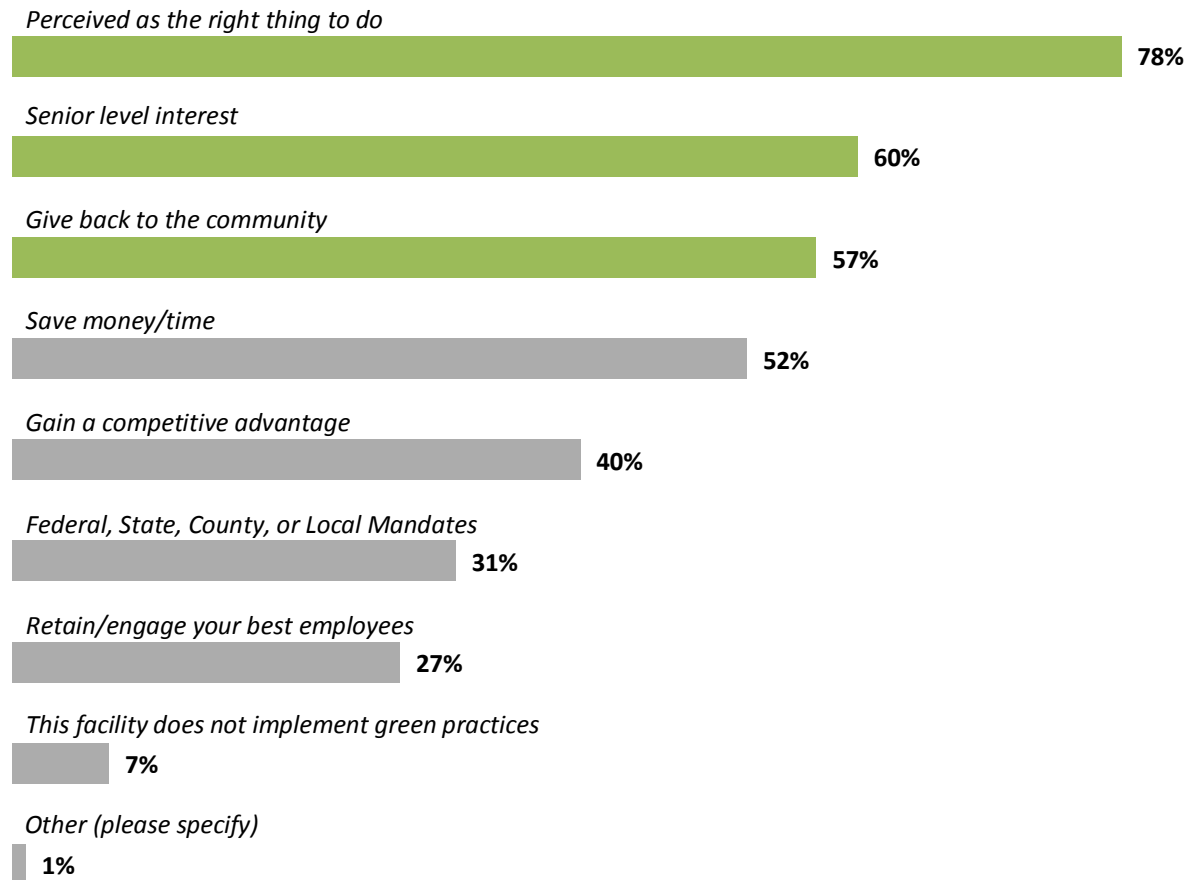
While the sample of the study was small in size, many of the findings were consistent with previous research on the venue industry (Hunt, 2016; Greenview, 2018, 2017). The general findings showed that venues are not only continuing to implement sustainable practices, but they were also continuing to focus on improvement. That being said, the results also mirrored previous studies that found that more needs to be done regarding venue sustainability (Hunt, 2016; Greenview, 2018, 2017).

As the field of sustainability has rapidly changed since the 2016 IAVM Sustainability Survey Report, we were unable to match most of the questions from the previous survey to the most recent version. One of the largest differences was the IAVM Sustainability Committee's movement away from the use of the words "environmentally friendly" or "green" and by replacing them with the broader, more inclusive term "sustainability", specifying "environmental sustainability" when necessary. Therefore, statistically speaking the questions on the different surveys were not comparable. However, despite the change in definition, some questions were nearly the same otherwise, and I mentioned the notable similarities below. One limitation of the study was that there were not enough respondents from the different types of venues (outside of convention centers), that we could compare and contrast between the venue types. The following are my key takeaways from the survey findings and their implications for venue managers.

SUSTAINABILITY IMPLEMENTATION

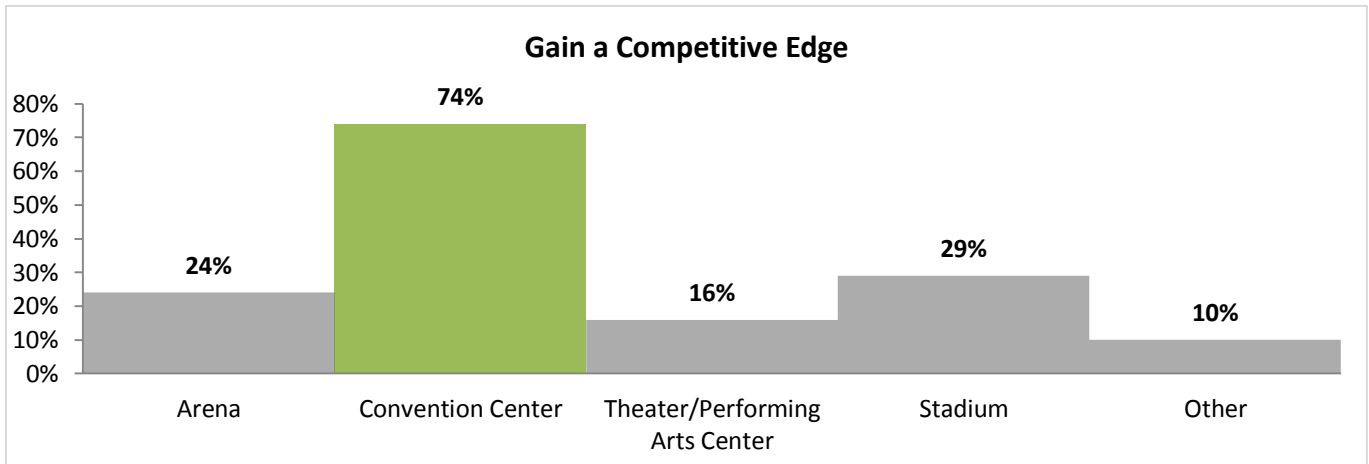
There were 80 (78%) respondents that said that they had implemented sustainable practices because it was the right thing to do, this finding was similar to 2016, when 81% of respondents said the same. Some surprising findings were that 57% of respondents said that they implement sustainable practices because they are giving back to the community; this is a large increase from 2016 where only 38% of respondents selected this answer. The increase indicates that more venue managers are seeing examples of how their sustainability programs are impacting their local communities and these results take time. It is also interesting to note that 61 respondents said that there was interest at the senior level. Previous research has shown that there needs to be support from the senior level for initiatives to be successful (Hunt, 2016).

Motivating Reasons to Implement Sustainable Practices - All Venues

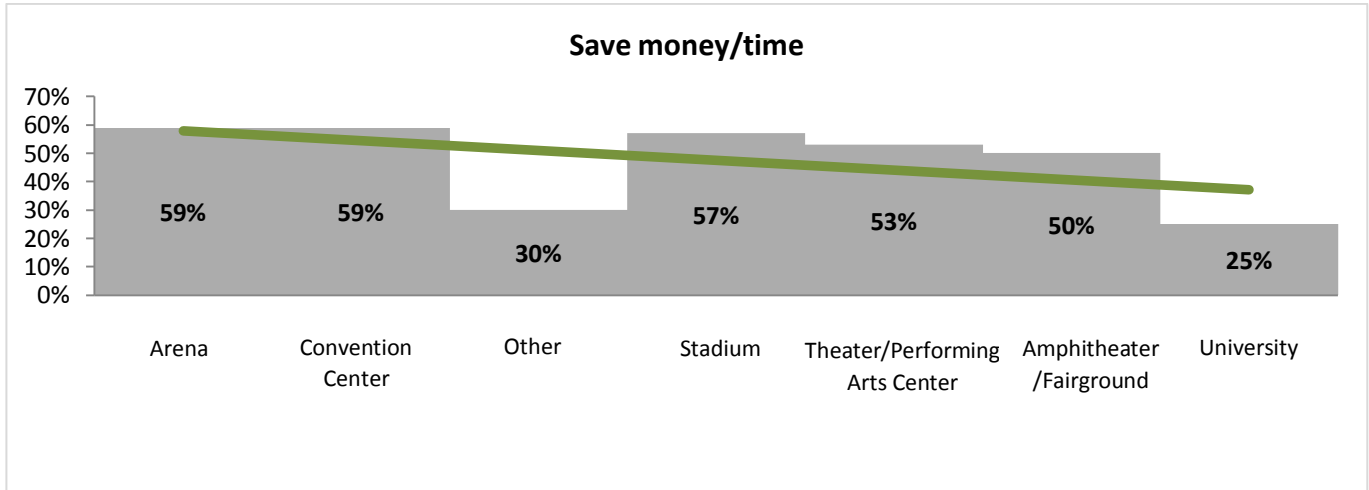


QUESTION: For which of the following reasons does your venue implement sustainability practices? (Please select all that apply)

- 102 responses out of 103 participants
- Top three choices have been highlighted in green



NOTE: *Gaining a competitive advantage* is a much greater motivator at Convention Centers (74%) than at other venue types (40% across all venues)

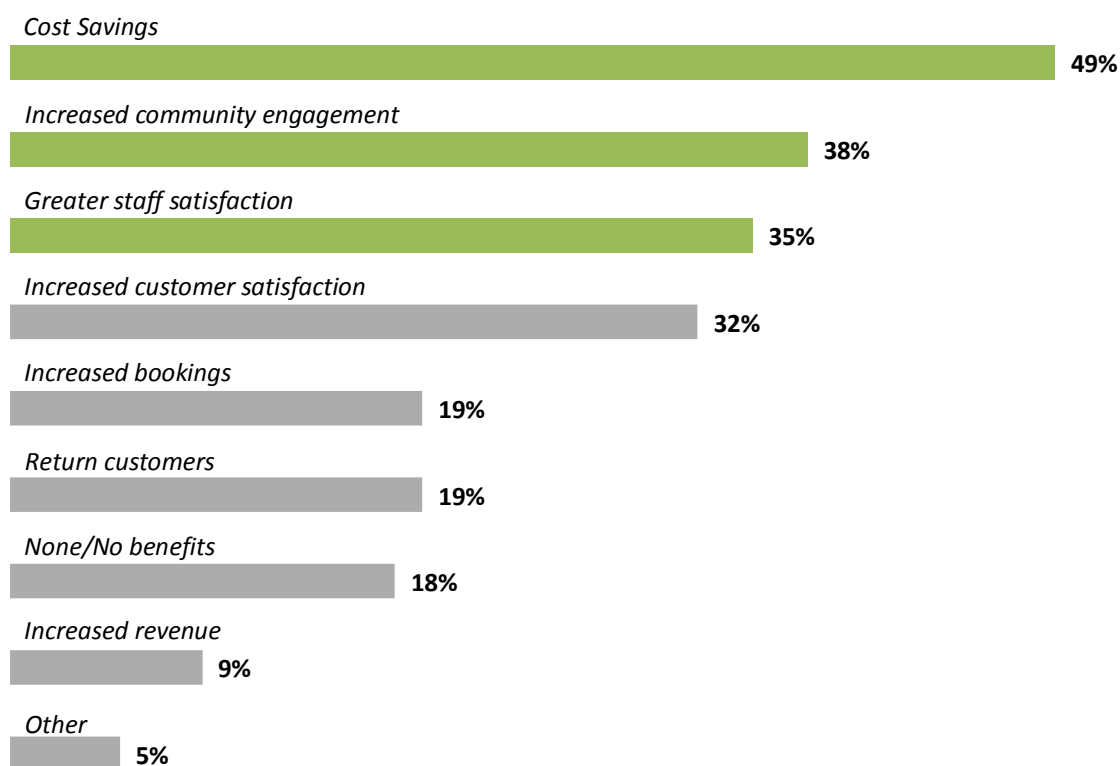


NOTE: *Saving money and time* is an equal motivator across the venue types

BENEFITS

The findings from number 12 were some of the most exciting of the survey. Organizations were finding a plethora of benefits from the implementation of sustainability practices. This question was not asked on previous surveys, yet showed a number of important points. The findings had some interesting correlations with the question that asked for the reasons that venues are implementing sustainable practices. While many people said that they were implementing sustainable practices to give back to the community, it is also interesting to note that 38% of the respondents said that sustainability programs led to increased community engagement. There was a similar correlation between competitive advantage, 40% said that they were implementing sustainable practices for competitive advantage, and 32% said that they are noticing increased customer satisfaction. Finally, there was another interesting relationship, 27% said that they were implementing sustainable practices to help retain and engage employees and 35% of the respondents said that they were experiencing increased staff satisfaction.

Benefits from Sustainability Programs - All Venues

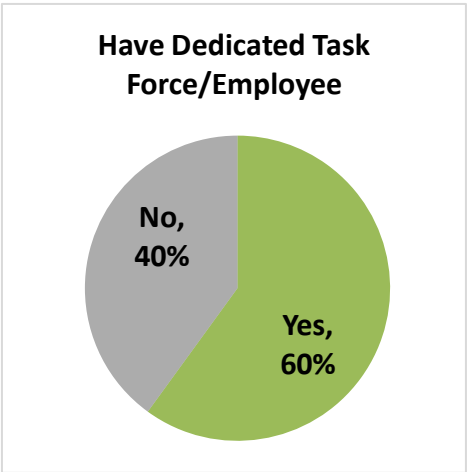
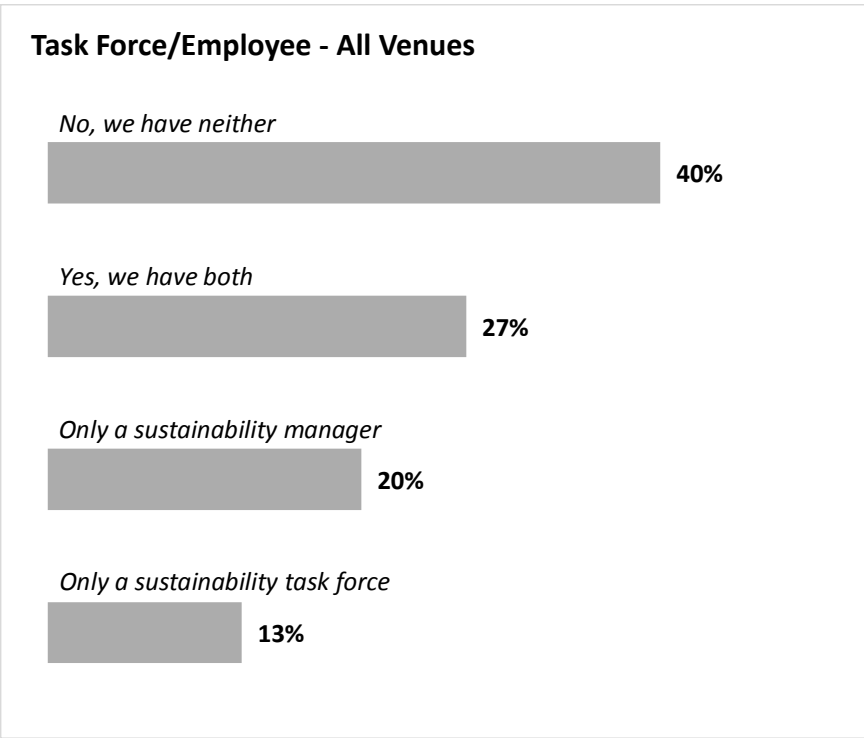


QUESTION: Due to your sustainability program, has your venue seen: (Please select all that apply)

- 77 responses out of 103 participants
- Top three choices have been highlighted in green

DEDICATED SUSTAINABILITY STAFF

The findings showed that 62 (60%) respondents had dedicated sustainable task forces and/or sustainability managers. This number points to the dedication that any venues have put towards their sustainability programs. Many venues find that the more advanced their program becomes, the more help they need running the program, especially when implementing certification requirements.



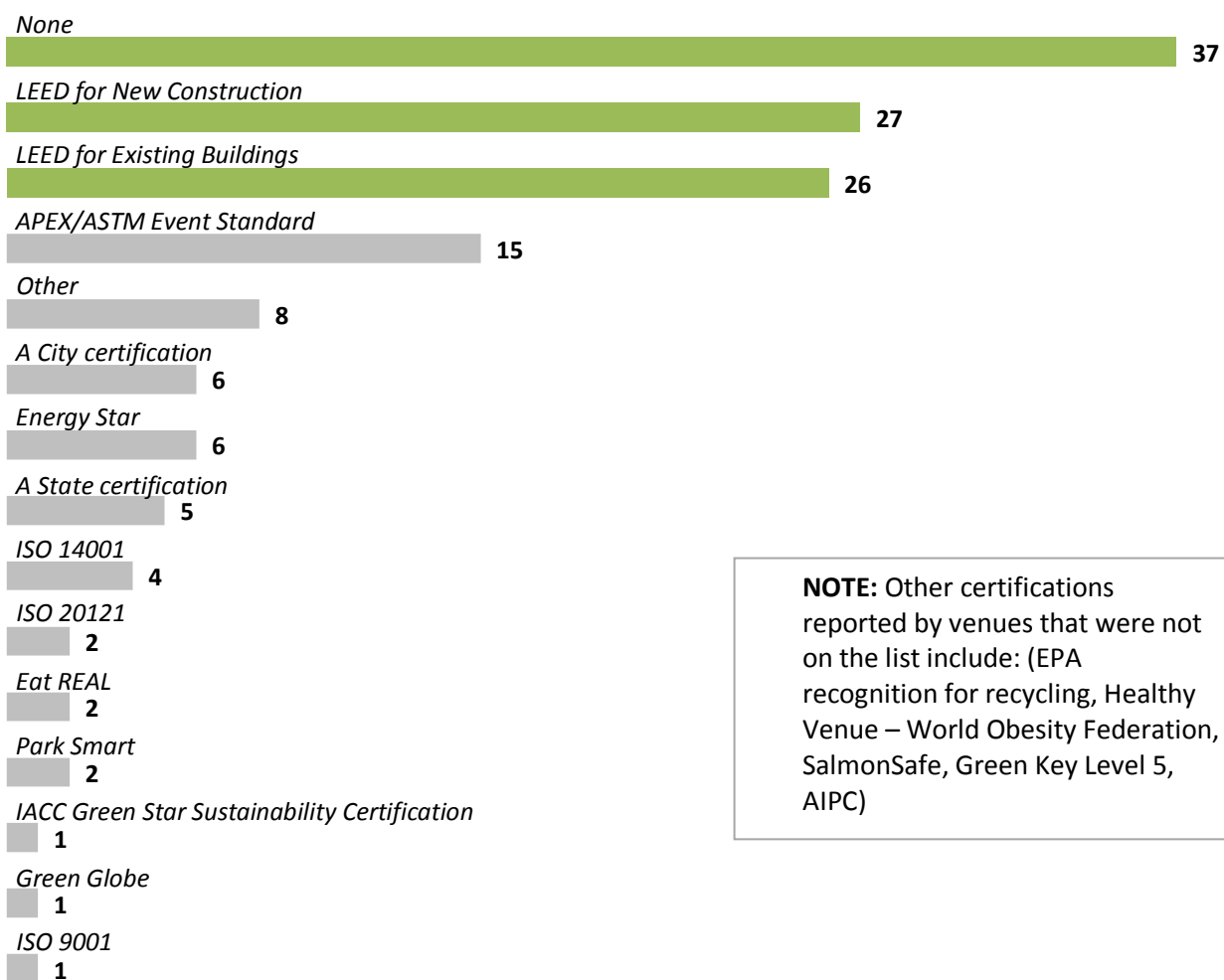
QUESTION: Does your facility have a sustainability task force and/or an employee dedicated to sustainability who implements, manages and measures your efforts?

- All 103 participants responded

SUSTAINABILITY CERTIFICATIONS

Something we realized as we were developing the survey was that the number of sustainability certifications available has significantly increased since the previous survey. The use of certifications had also increased from previous years and 61% of respondents stated that they had at least one sustainability certification. LEED (for New Construction and Existing Buildings) and the APEX/ASTM Sustainable Event Standards were the three most commonly used certifications. Of the venues that were certified, convention centers tended to have the most certifications. This may be related to competitive advantage, as 74% of the convention center respondents said that there was a competitive advantage to the implementation of sustainable practices.

Certifications - All Venues



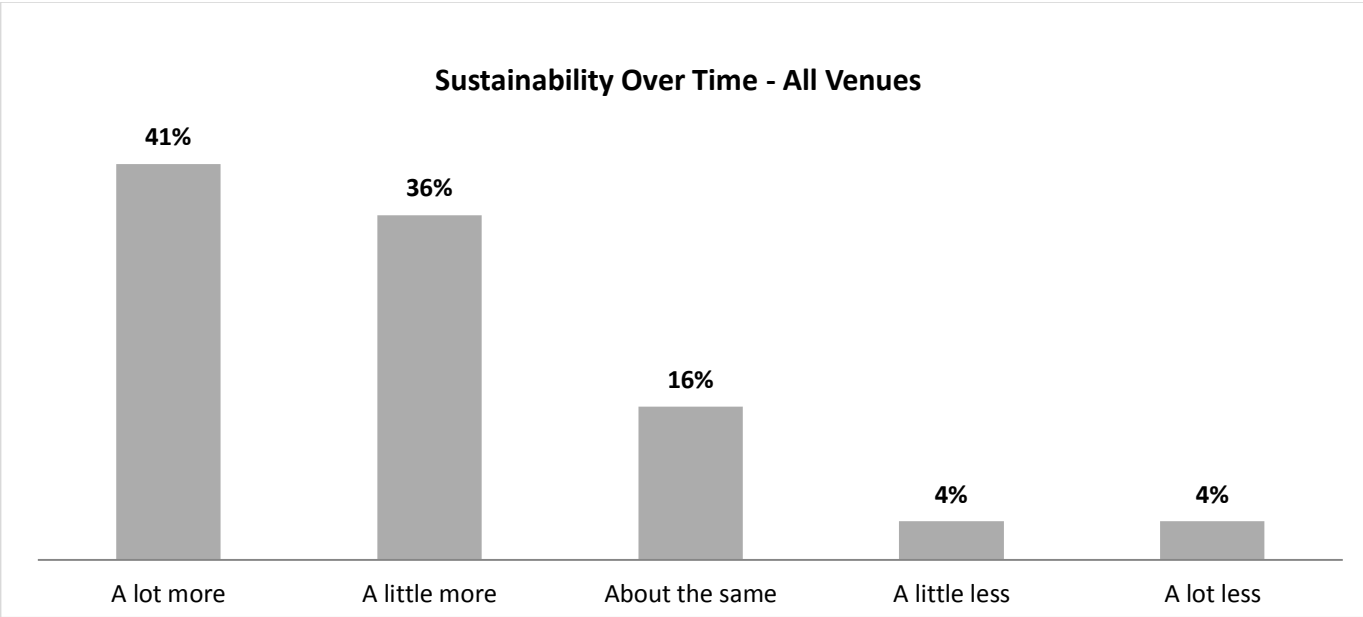
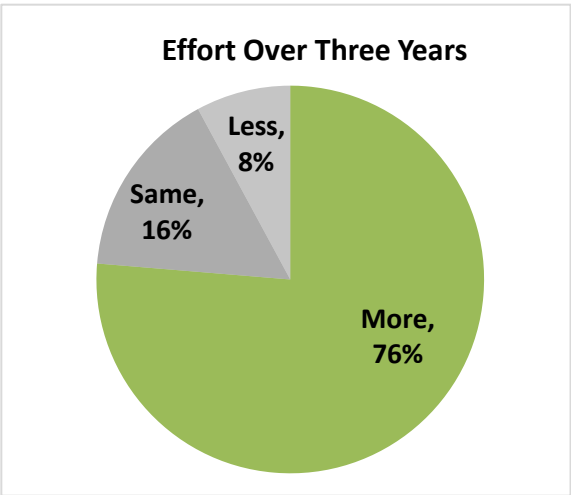
NOTE: Other certifications reported by venues that were not on the list include: (EPA recognition for recycling, Healthy Venue – World Obesity Federation, SalmonSafe, Green Key Level 5, AIPC)

QUESTION: Which (if any) of the following certifications does your venue currently have? (Please select all that apply)

- 94 responses out of 103 participants

EFFORT

Another exciting finding that was not asked on the previous surveys was: “Are you putting more, less, or the same amount of effort into managing your sustainability as you did three (or 1, or 5) years ago?’ The range was asked for venues who may be just starting their sustainability program ranging to venues who have been implementing sustainable practices for many years. The exciting thing is that 76% of the respondents said that their venues were doing more than they had in the past and 41% responded that they were putting a lot more effort into sustainability. This points to growth in sustainability programs across the industry.



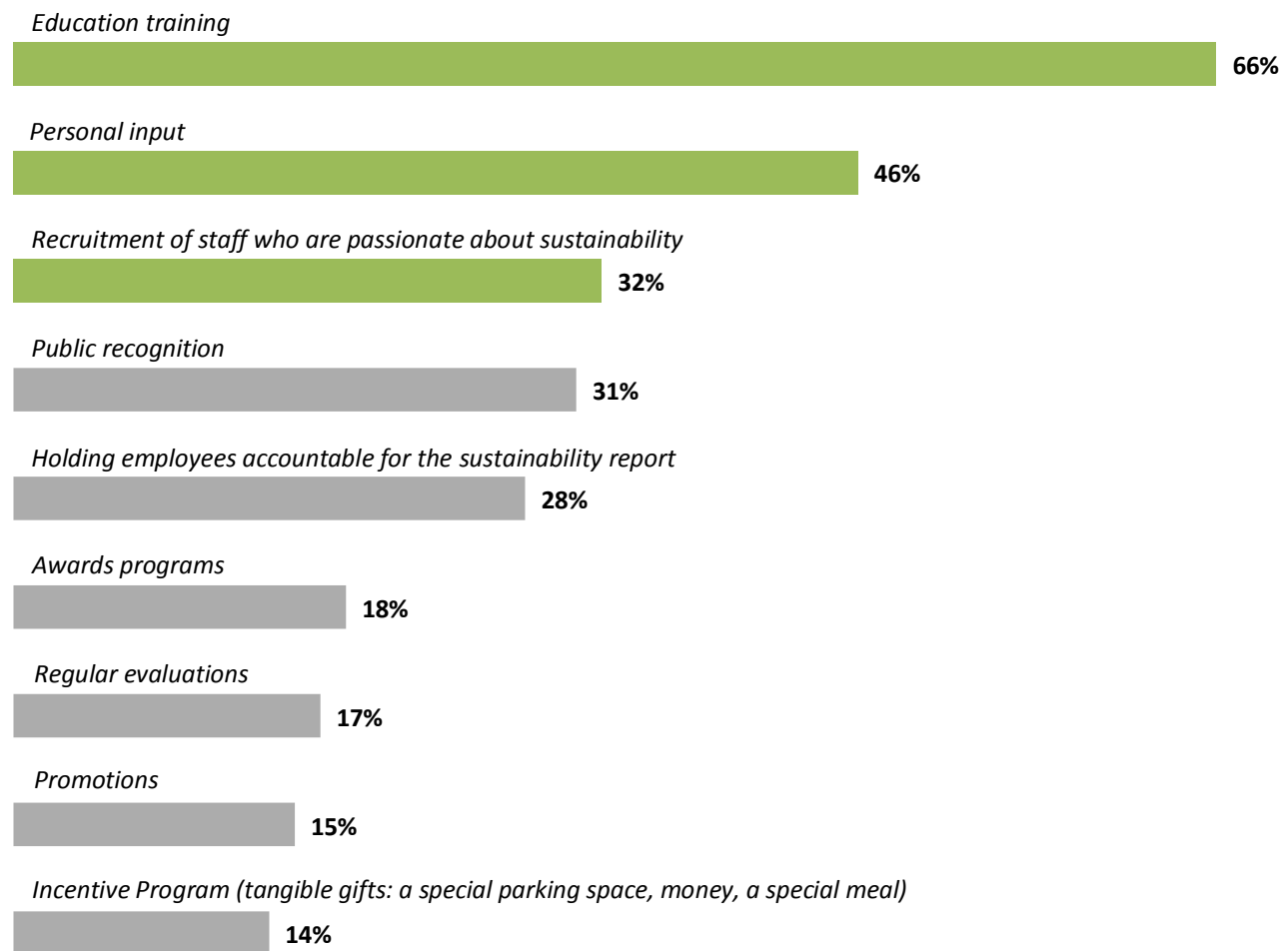
QUESTION: *Are you putting more, less, or the same amount of effort into managing your sustainability as you did three (or 1, or 5) years ago?*

- 76 responses out of 103 participants

ACQUIRING BUY-IN

Question 9 focused on activities that help venues to acquire the greatest staff buy-in. The responses were similar to other studies. The results tended to focus primarily on education/ training (66%) and personal input (46%). This was consistent with other research, which found that employees who understood why a program existed and felt that they are heard when they provided their ideas and opinions tended to be more engaged in venue sustainability programs (Hunt 2016).

Activities to Aquire Greatest Staff Buy-In to Sustainability Programs - All Venues



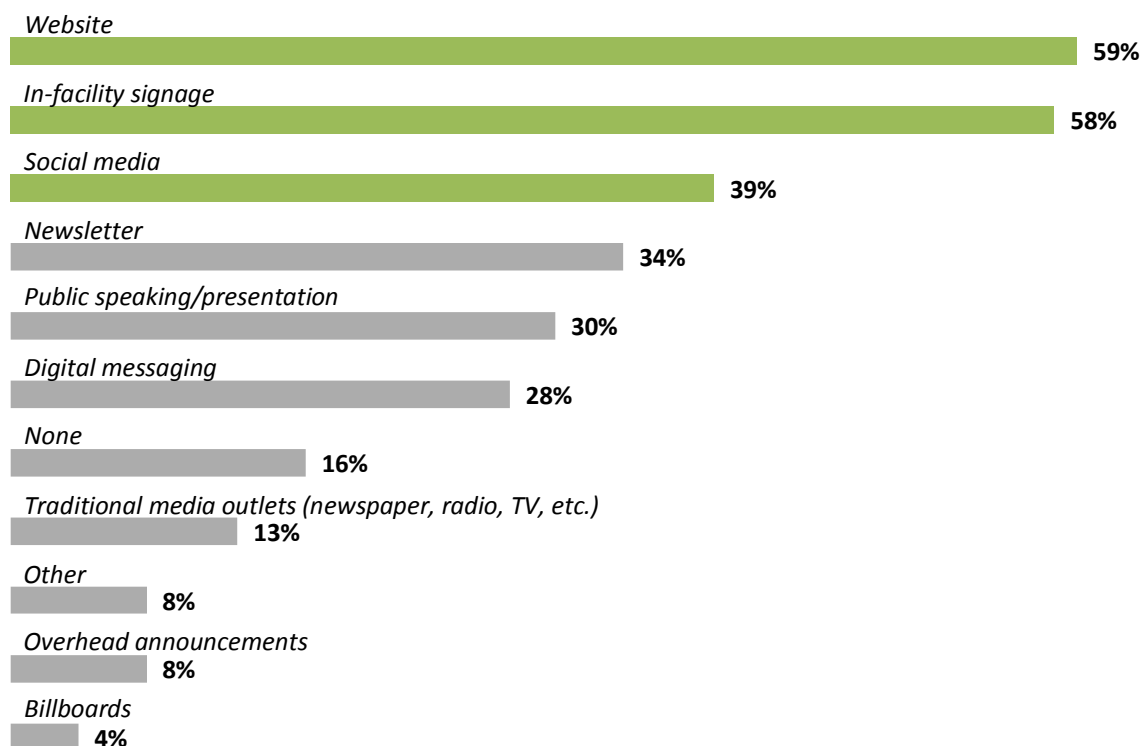
QUESTION: What types of activities have helped your venue to acquire the greatest staff buy-in to your sustainability program? (Please select all that apply)

- 71 responses out of 103 participants
- Top three choices have been highlighted in green

GETTING THE WORD OUT

The most common mechanisms to share information about sustainability activities were websites, in-facility signage and social media. However, when the respondents wrote their thoughts down, they also added meetings with clients, guides, emails and in a program. There were many creative ways of sharing initiatives that went beyond the survey.

Sharing Sustainability Activities - All Venues



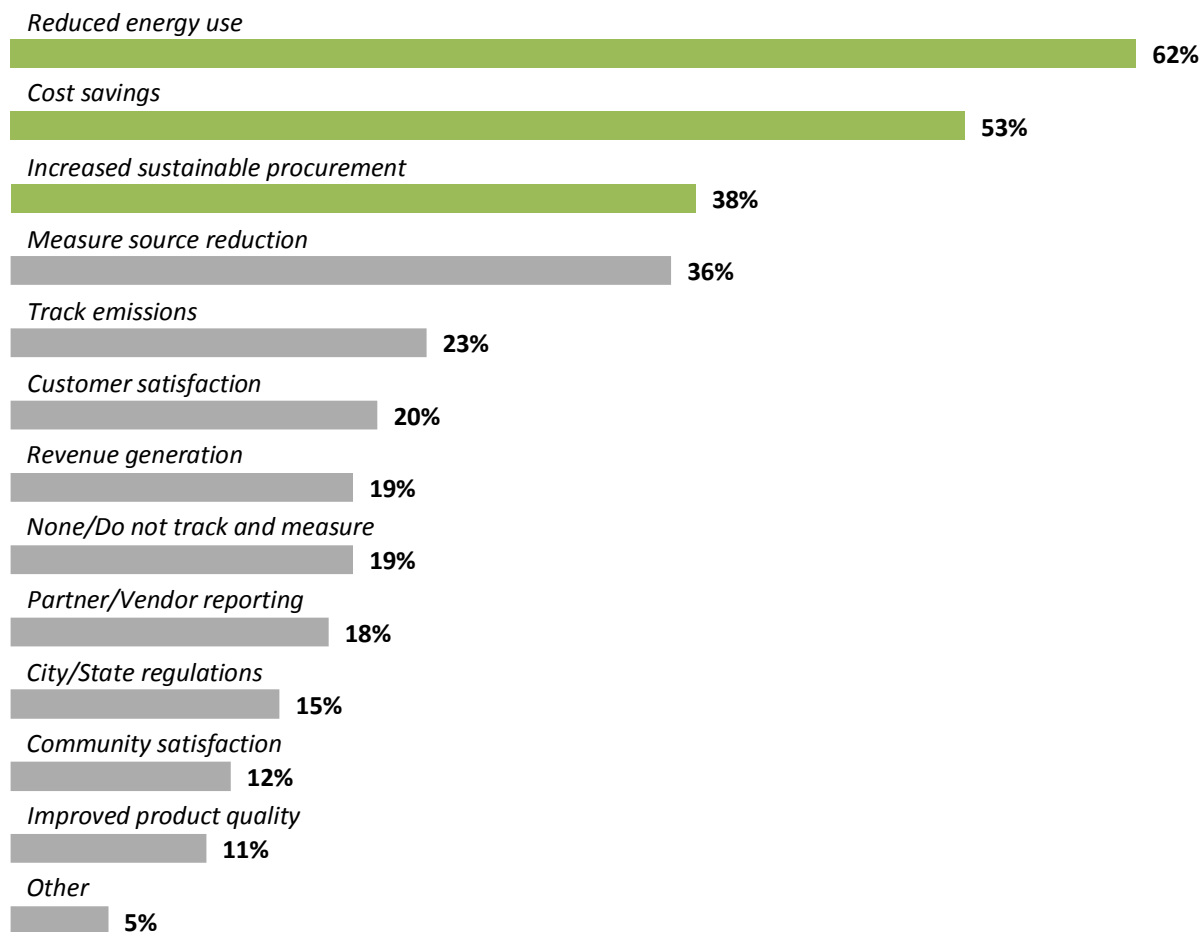
QUESTION: Which of the following mechanism does your venue use to share information on its sustainability activities? (Please select all that apply)

- 80 responses out of 103 participants
- Top three choices have been highlighted in green

TRACKING

Perhaps one of the most interesting and challenging aspects of venue sustainability programs is the tracking of metrics. Cost reductions may not be a primary motivation for the implementation of sustainable practices, but reduced energy use (62%) and cost savings (53%) showed up as the most common forms of tracking progress. As the saying goes, reduce, reuse, recycle. Venues were having great success measuring their results through reduction of energy and resources. The results of the tracking tended to focus on environmental practices. Customer satisfaction played a much smaller role (20%), as did community satisfaction (12%). None of the respondents selected employee turnover as a form of tracking. Other responses written responses included tonnage reports, diversion statistics and certification audits where organizations could potentially outsource the tracking.

Methods Used to Track and Measure Sustainability Performance - All Venues



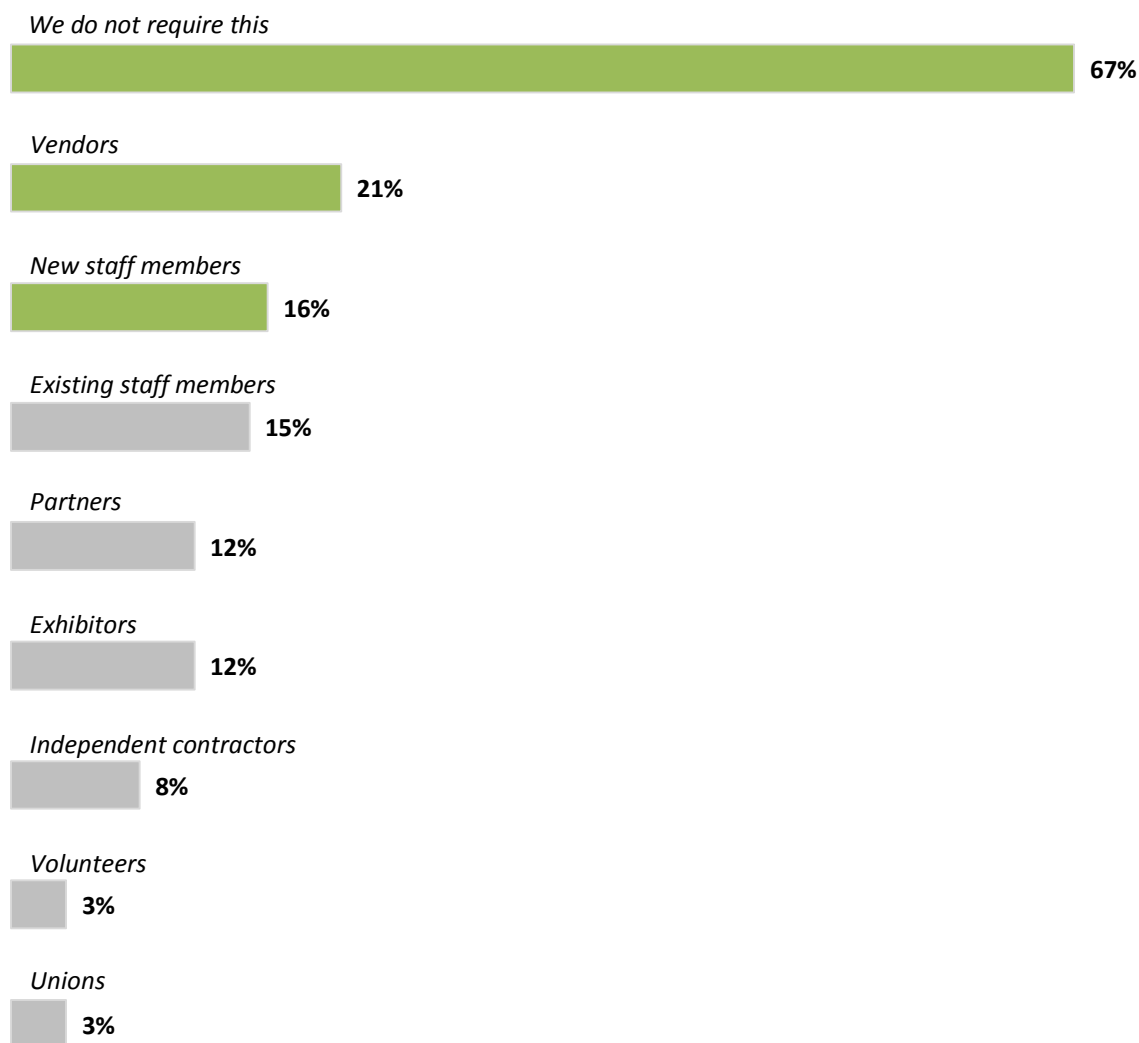
QUESTION: Which of the following methods does your venue use to track and measure its sustainability performance? Please select all that apply)

- 74 responses out of 103 participants
- Top three choices have been highlighted in green

SUSTAINABILITY AGREEMENTS

Most venues did not require individuals to sign agreements or verbally agree to their sustainability policies. Yet, 21% of venues required their vendors to sign agreements and 16% required new employees to sign contracts. This could be an opportunity for the industry, as written and/or verbal contracts encourage more education on a topic or program.

Participation Agreements - All Venues



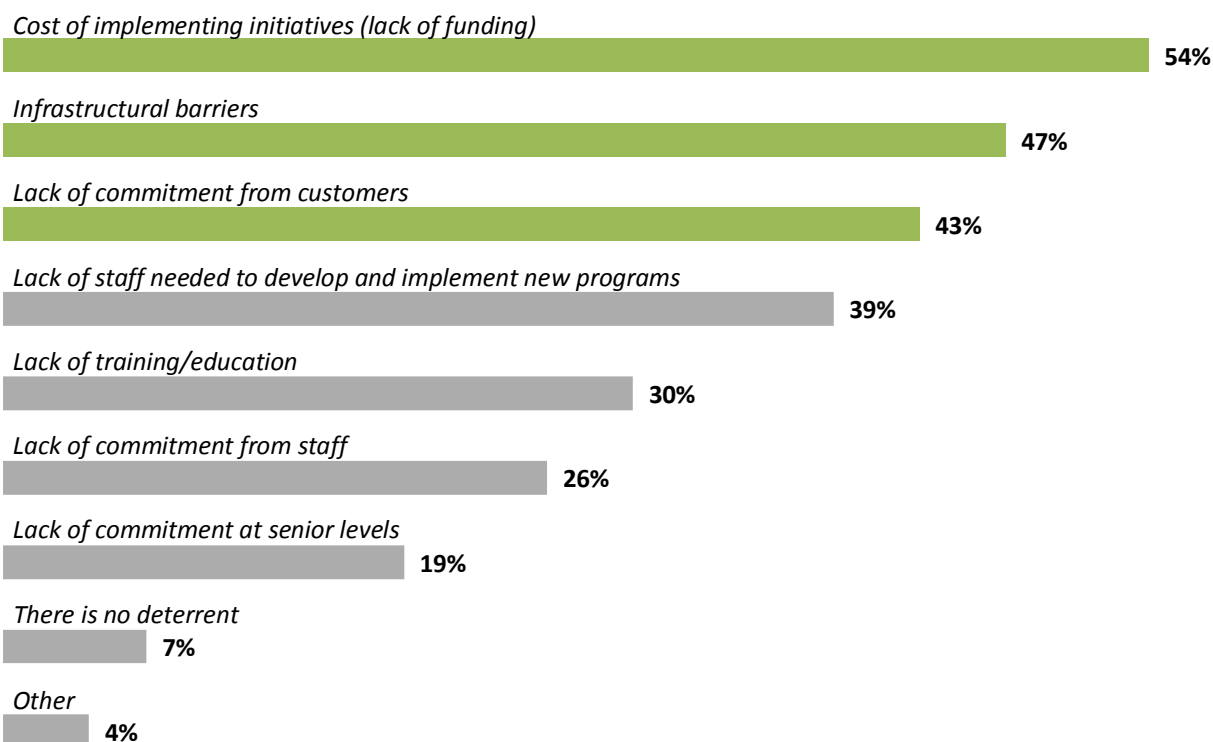
QUESTION: Do you require the following individuals to sign an agreement or verbally agree to participate in your sustainability policy? (Please select all that apply)

- 86 responses out of 103 participants

CHALLENGES

The findings that differed the most from previous surveys related to the greatest challenges/ deterrents that venues face when implementing sustainable practices. While cost of implementation was the most selected answer in the 2019 survey, the percentage of respondents was less than previous years (54%). In 2016, 64% of respondents said that cost was a deterrent to the implementation of sustainable practices, in 2012 it was 84%. The 2019 survey showed only 19% of respondents selected that there was a lack of support from senior levels. In 2016, 36% of the respondents said that there was a lack of support from senior levels, in 2012 it was 26%. Another key difference between the findings over the years were infrastructure barriers. In 2019, 47% of respondents selected infrastructural barriers as a challenge, while in 2016 only 32% of respondents had infrastructural barriers, 13% in 2012. The reason for this sharp increase could be, that as sustainability programs mature, they move past the “low hanging fruit” or the simplest sustainable practices and move towards more advanced practices that require larger, infrastructural changes.

Sustainability Practice Challenges - All Venues



QUESTION: *Which of the following have been challenges to implementing sustainability practices at your venue?*
(Please select all that apply)

- 74 responses out of 103 participants
- Top three choices have been highlighted in green

FUTURE SUSTAINABILITY FOCUS

Question 15 asked the respondents, “What is next for your organization’s sustainability focus?” The findings (45 responses) from the question seemed to heavily focus on

- Energy use, specifically solar, lighting, LEDs, HVAC
- Waste diversion (recycling and composting)
- Certifications (LEED, APEX/ASTM, ISO 20121 specifically)
- Education/ buy-in and guidelines for clients and vendors

What's Next? - All Venues

Increase involvement (customers, vendors, staff, community)



Certifications



Recycling/Waste diversion tactic



Reduce energy usage (solar installation, HVAC, track energy use, etc.)



Guidelines/Training/Education



LED/Lighting



QUESTION: *What is next for your organization’s sustainability focus?*

- 45 participants responded

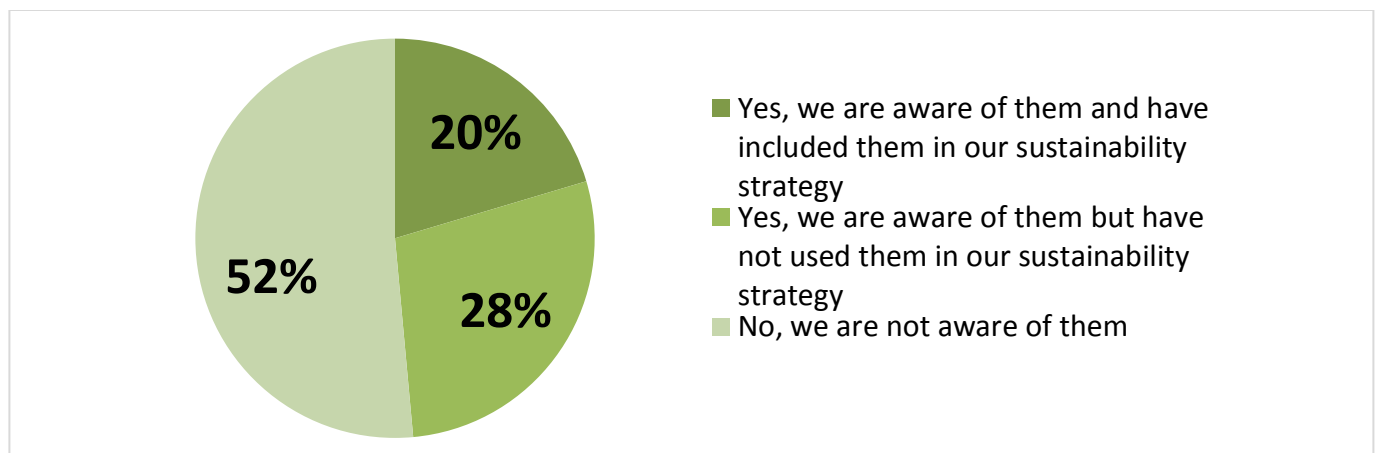
SUSTAINABLE DEVELOPMENT GOALS



Image provided by United Nations page

Go to <https://www.un.org/sustainabledevelopment/> to learn more about the UN Sustainable Development Goals

The survey found that 82 people were either unaware of the UN Sustainable Development Goals (SDGs) or were aware but are not utilizing them as a resource. I have had a lot of sustainability directors tell me that they need fresh ideas for sustainability program implementation; the 17 SDGs provide great ideas, resources and jumping off points.



QUESTION: Is your organization aware of the UN Sustainable Development Goals?

- All 103 participants responded

FINAL THOUGHTS

Overall, I was left feeling very encouraged by the findings of the study, more venues are starting to implement sustainable practices and many sustainability programs are advancing. The findings also showed that, while we have redefined what sustainability means for the industry, the industry still appears to be mostly focused on environmental practices. This provides opportunity for those seeking ways to further develop and measure sustainability within their venues. Staff retention, safety/ security, training/ education and community engagement all contribute to social sustainability. Another opportunity for further thought is ways in which we could better implement the UN Sustainable Development Goals in the venue industry. While the industry still has a long way to go on the sustainability spectrum, this report should be a hopeful reminder that the industry is continuing to move forward and more efforts are being made to implement sustainable practices.

