ASSOCIATION INTERNATIONALE DES PALAIS DE CONGRÈS

INTERNATIONAL ASSOCIATION OF CONGRESS CENTRES

INTERNATIONALER VERBAND DER KONGRESSZENTREN

AIPC Member Sustainability Programs and Policies: Survey Results and Analysis

This survey of AIPC member centre sustainability programs and policies was intended to explore the impacts of increasing attention to the issues of green meetings and green facilities, and assess any evidence that environmental reputation is becoming a more significant decision factor for clients. The survey was sent out to members on September 12, 2007. It received 63 responses by the close on October 12, which provides statistically very credible results.

Survey questions, with corresponding results are as follows (an analysis is at the end);

Questions:

1. **Have you seen increasing interest in environmental / sustainability issues associated with your centre? Do you expect this issue will be of increasing / decreasing interest in the future?**

92% of respondents indicated that they had seen increasing levels of interest in these issues against 8% who said no. An even higher number (98%) said they believed that the issue would be of increasing interest in the future as opposed to only 2% who thought interest would decrease.

2. **Does your centre have a formal statement or policy with respect to environmental practices or programs? If yes, how long have you had such a statement / policy?**

68% of respondents indicated that they do have such a statement and / or policy in effect as opposed to 32 % who did not. The majority indicated that they had put such a policy in place within 1-4 years ago, as follows:

In process	3	6 months	5
1-2 year	14	3-4 year	11
5-10 year	2	> 10 year	3

Of the balance of respondents (those that said they had no such policy in place), 12 indicated they intended to put one in place in the near future as opposed to 2 who had no such plans.

3. **What aspects of your operation does the policy cover?**

The majority of respondents indicated that their policies included waste recycling (97%) and energy conservation (95%); just over half (58%) also addressed food and beverage sourcing. Other elements included in the policy were stated as being:

- Carbon footprint
- Green procurement
- Corporate responsibility
- Building materials
- Travelling
- Social/HR
- Water management
- Tree planting
- Cartridge and toner recycling, air filter recycling
- Zero waste

4. Do you have to comply with local government environmental regulations? If yes, in what areas?

59% of respondents indicated that they do indeed have to comply with local government environmental regulations as opposed to 41% who said they did not. Those who did identified the following as the areas where compliance was required:

- Waste disposal
- Energy/electricity
- Water management
- Recycling
- New building design
- Carbon emission
- Smoking
- Procurement
- Green area (tree cutting)

5. Has your centre developed any specific new environmental initiatives in the past three years? If so, what are these?

Again, a majority (71%) of respondents indicated that they had developed new environmental initiatives in this period as opposed to 28% who had not.

Of the new initiatives, those most often mentioned were:

- Waste recycling & management
- Water consumption - recycling
- Energy saving
- Composting

However, there were also a wide variety of other initiatives, including:

- Temperature control systems
- Use of lake water for air conditioning
- Optimizing heating/cooling system

- New wood burner on site; change of boiler; air filter recycling; combined heat and power plant; green roof
- Using electricity from renewable sources
- Local sourcing of materials and supplies
- Environmental management certificate in accordance with UNE EN ISO 14.001/2004 standards
- Separation of oils from waste water
- Purchasing from post consumer materials
- Carpet treatment
- Usage of food industry oil for heating
- Use of environmental friendly detergents
- Creating an environmental task force
- Tree planting & landscaping
- Usage of recycled paper, compostable products
- Using solar energy
- Using fair trade products

6. Do you / will you feature your environmental policy / practices in your marketing materials?

From a market perspective, again a majority (73%) of respondents indicated that they featured their environmental practices in marketing materials as opposed to only, no 14% who did not (some did not respond to this question).

7. Have you had clients specify environmental expectations as part of a bid process (i.e., in an RFP)? If so, what proportion?

Response to this question was split about evenly, with 51% of respondents stated that they had environmental considerations specified by clients as part of a business bid and 49% saying they had not. Of these, the majority noted that this was a factor in somewhat less than 10% of bids, as follows:

1-5%: 7 5-10%: 7 10-20%: 4 > 20%: 1

8. Have you had clients indicate that environmental factors are primary factors in their site selection decision? If so, what proportion?

While only about half of respondents had seen environmental factors actually specified in a bid document, a much greater number – 72% vs. 15% - said that clients had indicated it was a primary factor. This is a very significant response, as it suggests a much stronger influence of sustainability on site decisions that the process would suggest and that the formal process may simply not yet have “caught up” with prevailing attitudes. Again, the proportions of clients taking this position were somewhat less than 10%.

9. **Do you offer specific client program options that address environmental considerations (i.e., a "green meetings" package)? If so, what proportions of your clients utilize these?**

Once more, a clear majority (73%) of respondents stated that they did offer environment-friendly packages as opposed to 27% who did not. However, most felt that it was too early to gauge utilization as the option had been available for too little time.

10. **Have you received or are you pursuing any official recognition for environmental design standards (i.e., LEED certification)? If so, what is this?**

A significant number of respondents (59%) indicated that they were in fact pursuing or had achieved design standards recognition as opposed to 41% who were not. The majority of these were LEED (x5), ISO (x4) or Green Globe(x3) but a variety of other accreditations were mentioned including:

- Australian green building council rating
- SVANEN
- Greenhouse Challenge
- Scottish Green Business Tourism Award
- BOMA Go Green
- Green Meeting Association (certification for marketing purposes)
- BREEAM
- Certification on environmental achievements by the State of Bavaria
- Basque environmental regulation
- Clean City Award

11. **Have you carried out / are you considering building design or operational features to improve the environmental performance of your centre?**

75% respondents replied to this question in the affirmative as opposed to 25% who were not.

12. **If you are carrying out renovations or have done so within the last 3 years, do these incorporate environmental features? If yes, what are these?**

69% of respondents indicated that they had in fact incorporated environmental features into their renovations as opposed to 31% who had not, suggesting that renovation programs were seen as good opportunities to make improvements in this regard. Amongst the improvements noted were:

- Energy saving: isolation, consumption
- Water saving
- Waste management

- In relation to electrical installations
- Exterior landscaping
- Choice of building materials
- Cooling towers, waste stations, packing and sorting areas, airco reduction

13. **Does your centre offer a carbon offset credit program to clients who want to access this for their event? Have you ever been asked for this by clients?**

A large majority of respondents (89%) indicated that do offer this option to clients versus only 11% who did not. An almost equally large majority (86%) noted that they had actually been asked for such an opportunity by clients as opposed to 14% who replied in the negative.

14. **Do other related agencies in your destination (i.e., airlines, PCO's, convention bureaus) offer such a program? If so, who are they?**

74% of respondents replied that there were such offerings in their destination, with only some 26% responding in the negative. Amongst the organizations / businesses referenced in this regard were:

- Convention bureau
- Easy Jet and several organisations which are trading with credits
- MCI
- All Glasgow 'A' list hotels (in a common scheme)
- Travel agencies, national and regional airlines
- CPL Events – PCO
- Airline travel offsets
- A number of airlines
- Geneva convention centre planning initiative

Analysis:

While the demand for environmental products and qualifications does not yet appear to be anything like universal (with less than 10% of clients cited as making major demands in this regard), centres are clearly determined to get ahead of the game and to use their achievements as marketing devices for anticipated growing demand.

Large majorities reported their expectation that demands for sustainable practices would increase, and most are taking, or have recently taken, significant actions in this regard. These actions are only driven to a limited extent by local compliance requirements, with many being at the initiative of the centre itself.

The scale of activity in this area is such that it is probably the case that centres without significant sustainability credentials and programs are already in the minority, and that those with a solid list of accomplishments are looking for even more ways to distinguish themselves. In this respect, market expectations are as likely to be driven by competing centre offerings as they are by client demands.

At the same time, while only a minority of clients appear so far to be demanding sustainability measures and products, most centres have experienced this from at least some clients. This suggests that demand is likely to grow as other clients respond to increasing corporate or member pressures, and that centres that are prepared to respond will find themselves in a better competitive position.