isla.

temperature check

europe 2025

Contents

Foreword

isla's *Temperature Check Europe 2025* provides a data-backed snapshot of carbon emissions in European business events. As climate pressures intensify, the sector faces growing urgency to both reduce its impact and adapt to a changing world.

This report serves as both a benchmark and a guide, helping businesses identify where meaningful sustainability progress can be made.

Data is the foundation of meaningful action. Without comprehensive measurement, we cannot track trends, set realistic benchmarks, or drive evidence-based change.

By analysing data from our industry-leading platform, TRACE by isla, alongside insights from surveys, industry experts, and event professionals, we explore key carbon hotspots, reduction opportunities, and strategic interventions to support a low-carbon, resilient events industry.

— *Anna Abdelnoor, CEO*

Executive Summary

The sustainability landscape is undergoing a profound transformation, and the events industry is at a critical juncture. Climate change is no longer a distant threat; it is a lived reality, already disrupting events through extreme weather, insurance volatility, and infrastructure stress.

The sector is increasingly exposed to physical climate risks, making adaptation essential for business continuity. Events must now be planned within planetary boundaries, acknowledging limits to resource use and the impact of rising emissions, alongside shifting global geopolitical and economic pressures.

At the same time, regulation is catching up. From emissions disclosure to restrictions on environmental claims and new circular economy mandates, a wave of sustainability legislation is rapidly reshaping expectations. By the end of this decade, practices now seen as progressive will become baseline legal requirements.

Measurement practices are improving, with higher energy and waste data capture rates, but significant gaps remain, particularly in audience travel reporting. The data shows that while travel remains the largest contributor to event emissions, over 60% of emissions arise from production, materials, catering, and infrastructure - highlighting multiple intervention points beyond travel alone.

Those who invest early in data systems, supply chain transparency, and emissions tracking will be better positioned to meet compliance requirements, secure new partnerships, and maintain commercial resilience.

The challenge ahead is how swiftly the event sector can adapt, not just to regulatory requirements, but to a new economic and environmental reality that demands resilience, accountability, and bold decision-making.

Dataset

This report draws from the largest dataset of its kind in Europe - analysing 954 events across 22 countries, with a total recorded carbon footprint of 56,000 tCO_2e. New benchmarks, and deeper insights into audience and staff travel, catering, material use and waste provide a clearer picture of where meaningful action can be taken.

Data from 954 events across 22 European countries

Regulation

While regulation is a proven catalyst for change, much of the sector's leadership is emerging ahead of mandates. Among leading businesses, 38% are already measuring emissions, embedding sustainability into job roles, and establishing dedicated committees - despite only 17% being legally required to report.

At its core, compliance is about using data to reduce impact and manage risk

Culture

This shift is not only regulatory, but cultural and commercial - driven by rising investor expectations, public scrutiny, and evolving client demands. 86% of event professionals cite ethical and moral responsibility as their leading motivation for sustainability action, yet values alone don't always translate into progress. Bridging that gap is critical.

Ethical and moral responsibility motivates 86% of event professionals

Climate change and progress in 2024

Extreme weather and the breach of planetary boundaries

2024 was officially the warmest year [1] in 100,000 years. We crossed 7 out of 9 planetary boundaries [2] - the thresholds that define a stable and habitable Earth. These boundaries, from biodiversity loss to freshwater depletion, are interconnected, and exceeding them signals an escalating crisis.

Across the world, cases of extreme weather intensified in 2024, with 617 extreme weather events [3] of which 219 were attributed to climate change.[4] In Europe, flash floods in Spain resulted in over 200 fatalities,[5] reminding us of the increasing human costs of a warming planet.

The reality is stark: the environment is changing, and the event sector is not immune to these impacts. Businesses must decide how they will respond.

Progress amid crisis: signs of a global shift

While the environmental crisis deepened, 2024 also marked a year of progress in climate action. Global clean energy investments exceeded $3 trillion[6], double that of fossil fuels. This shift signals that renewable energy is now the more financially viable choice for the future, accelerating the transition to cleaner and more sustainable energy systems.

Governments also toughened their stance on sustainability, with an increasing focus on greenwashing crackdowns, particularly in advertising and corporate sustainability claims. High profile brands such as Lululemon, McDonald's and Walmart, have been in the spotlight for greenwashing: exaggerating the brand's positive impact while overlooking key environmental issues, including its carbon footprint. New greenwashing rules risk fines of up to 10% of their annual revenue.

The European Union is leading the way in policy shifts, introducing stricter regulations. These systemic factors are driving forward the transition to a circular and low carbon economy.

The realities of a changing landscape

The events industry is no stranger to disruption. From recessions to pandemics, reacting has been the name of the game. It's established the events industry as creative, resilient and ready to pivot.

But climate change is not a short-term challenge to ride out; it's a permanent shift reshaping the world as we know it. Event organisations are far from immune to climate change, with supply chain risks, rising insurance costs, and evolving market demands forcing the industry to react.

We will need to be proactive in mitigating risks, adopting sustainable practices, and investing in contingency plans to protect ourselves against increasing climate uncertainties.

1 WMO, 2025
2 PIK Potsdam, 2024
3 ArcGIS, 2024
4 World Weather Attribution, 2024
5 Al Jazeera, 2024
6 IEA, 2024

How climate change is affecting events

The events industry is already experiencing the impact of climate change and weather-related cancellations are likely to increase.

Correlation between extreme weather and event disruption grows

Research by *McKinley et al* [1] found that 2091 events across the world had been disrupted between 2004-2024, with storms accounting for 81.9% of reported cases.

The research shows the UK is the second highest country to have recorded examples of events that have been disrupted by extreme weather with Germany seventh and Spain tenth.

In 2023 and 2024 the total number of reported event disruptions caused by extreme weather increased by 86.5%.

Extreme weather: a threat to event safety and stability

Extreme weather threatens crowd safety, disrupts transport infrastructure, strains supply chains, drives up insurance costs and in the worst cases leads to cancellations. Due to their outdoor nature, festivals and concerts have been most affected by extreme weather but exhibitions, sporting events, and activations have also been impacted.

In 2024, severe flooding in Valencia resulted in reported losses of over 5.2 million USD [2] across 30 event companies.

According to a rapid analysis by World Weather Attribution [3], climate change made the intense rainfall that week 12% heavier and twice as likely to occur.

Flight disruptions, flooded venues, and overheating in poorly ventilated spaces are becoming real challenges for event organisers. On top of this, existing city infrastructures are not well prepared. The UK's most popular city for conferences, London, is also the country's most vulnerable city to extreme weather [4].

What might this mean for the cost of event insurance?

Climate change will challenge the traditional insurance model for events. Standard insurance cover for adverse weather only covers indoor events, while outdoors usually have around a 14 days prior limit. In the case of extreme weather, there is rarely that much warning. This means the insurance costs for events will increase to ensure coverage. Festivals are already seeing this, with insurance premiums tripling in recent years [5].

Event businesses must act now

This means measuring and reducing environmental impacts, strengthening risk assessments, tracking our supply chains, integrating early warning systems, adapting insurance policies and assessing the viability of some outdoor events. The crucial question is no longer whether climate change will affect events, but rather "what measures can we implement to mitigate the severity of its effects?"

1 McKinley, S., Geoerg, P., Haghani, M., Feliciani, C. (2025). Mapping the impact of extreme weather on global events and mass gatherings: Trends and adaptive strategies. Manuscript submitted for publication.

2 IQ Magazine, 2024

3 World Weather Attribution, 2024

4 AXA, 2024

5 The Ticketing Business, 2019

Key trends in sustainability legislation

Legislative changes are nothing new for the event sector - adapting to new rules and regulations is part of the job. But the pace and scope of sustainability legislation is accelerating rapidly, with new requirements affecting every part of the supply chain. From organisers and suppliers to venues and contractors, the industry must be ready to comply and respond.

Disclosure

Some event organisations are already reporting under regulations such as the UK's Streamlined Energy and Carbon Reporting (SECR) and Energy Savings Opportunity Scheme (ESOS), particularly when working with regulated industries like pharmaceuticals. Venues, meanwhile, are required to hold an Energy Performance Certificate (EPC) and are beginning to shift operations to meet minimum energy efficiency standards.

New EU sustainability regulations are set to significantly transform how businesses track, report, and manage their environmental impact. Large companies operating in the EU are already subject to mandatory reporting under the Corporate Sustainability Reporting Directive (CSRD).

By 2027, any non-EU company generating over €150 million in turnover within the EU will also be required to comply.

Obligations for small and medium-sized enterprises (SMEs) will come into effect by 2028 and will require listed SMEs and those with 1,000+ employees to report.

The UK is currently developing its UK Sustainability Reporting Standards, with a draft expected this year. These are likely to align with the EU's standards, ensuring UK businesses remain compliant and can continue to trade easily with the EU.

Environmental claims

Both the UK and EU are placing increased scrutiny on unsubstantiated and vague environmental claims to protect consumers. Without verifiable data, businesses risk fines and reputational damage for greenwashing.

Only products and services with substantiated claims that *exceed* current environmental standards will stand up to regulatory scrutiny.

Transparency and accuracy in sustainability messaging are becoming legal imperatives.

Circularity and nature

A growing body of regulation is pushing the industry towards circularity and nature-positive practices. This means a move away from extractive, single-use models towards systems that prioritise responsible sourcing, longevity and redistribution. New rules are also emerging to protect biodiversity, prevent pollution, and promote nature restoration.

Within this decade, incoming legislation will no longer treat circularity, nature protection, and regeneration as optional, but as baseline requirements.

These latter changes are particularly relevant for the event sector, which has traditionally followed a linear "take-make-dispose" model. From temporary structures and single-use builds to logistics that are energy and fuel intensive, many standard practices are out of step with emerging environmental standards. But this is changing.

For the events industry, this signals a fundamental shift in how events must be conceived, produced, and evaluated for both impact and compliance.

Major new legislation and anticipated effects on the event sector

Legislation	What this might mean for events
Corporate Sustainability Reporting Directive (CSRD) (EU)	Requires large companies to report on sustainability performance, including Scope 1, 2 & 3 emissions and climate risks. Recent changes have increased the employee threshold for mandatory reporting to 1,000 and SMEs that are publicly listed will need to report by 2028. Expect continued growth in client requests for sustainability data, even for exempt companies, due to value chain transparency requirements.
Green Claims Directive (GCD) (EU) and UK Green Claims Code (UK)	Bans vague terms like “eco-friendly” and other unsubstantiated claims. All environmental claims must be verified by third parties. Strengthens enforcement against misleading sustainability claims, with fines up to 10% of turnover for non-compliance. Event organisers must review marketing materials and ensure accurate sustainability messaging.
Digital Product Passport (DPP) & EU Packaging and Packaging Waste Regulation	Aims to improve transparency and traceability of materials and reduce use of virgin materials in packing. Products - including furniture, textiles, paper, plastics, and electronics - will need QR-codes or other data carrier tools that show sustainability data. Expect increased scrutiny on event production materials and supplier choices.
Nature Restoration Law (EU)	Requires 20% of EU land and sea to be restored by 2030. This could lead to higher costs for materials sourced from natural resources, such as timber for builds and food for catering.

Legislation and compliance aren’t going away

While they’re not a silver bullet for sustainability, they do open the door to powerful strategic insights. Compliance isn’t about ticking boxes, it’s about building a clear picture of your sustainability impact and turning that data to your advantage.

With the right insights, businesses can anticipate risk, lead with confidence, and unlock certifications, partnerships, sponsorships, and funding. Regulations will keep evolving, but you don’t have to wait. By aligning with legislative direction now, you gain an advantage, get a head start, and future-proof your business.

INDUSTRY PERSPECTIVE

Opinions and reflections from reporting businesses

Legislation brings both challenges and new opportunities to the sector. Although regulations can be complex and difficult to interpret, especially for SMEs without in-house legal or sustainability teams, legislation provides much needed direction and consistency. For those newly required to disclose sustainability data, the workload may feel overwhelming, but like most tasks, it becomes easier with familiarity and experience.

For smaller organisations, it can be a real challenge to collect and provide even basic emissions data - often due to limited time, budget, or expertise. This creates friction when working with larger partners who require Scope 1, 2, or 3 data to meet their own reporting obligations. However, event businesses are used to overcoming challenges and this new stage in reporting will be no different.

A level playing field

Informa, the world's largest exhibition company, is required to report in line with CSRD. **Ben Wielgus, Head of Sustainability**, shares his thoughts:

"For large, international event organisers like Informa and our many suppliers, reporting programmes like the CSRD present both a challenge and an opportunity. It's a challenge because we want to spend as much time as possible delivering our programmes and taking action, and good reporting also needs resources and attention. But it's also an opportunity because it can help us focus on the things that matter most in sustainability and encourage more consistency across the industry.

> **"Many companies will hopefully now be asking for the same data, and therefore the same improvements, from our supply chain partners.**

That will be particularly useful in areas such as energy and carbon efficiency, waste reduction, reuse of materials and social issues such as safety, training, inclusion and local economic impact."

Preparation is key

For **Jennie Mossman, Head of Responsibility at Amplify,** aligning with clients' reporting needs has provided an opportunity to take stock, standardise and implement change:

"Since 2022, we've been measuring our global operational footprint, aligning with the Greenhouse Gas Protocol. This has helped us to identify key hotspot areas and focus our efforts on future reductions. We have found a huge increase in the number of clients and wider stakeholders asking for this information, and having three years of data means we are prepared to easily disclose this information and credibly align with requests.

Whilst the size of our business means we're not currently mandated to report by legislation coming into force, we know this is only going to accelerate and we want to ensure we are already levelling up. That means deeper dives into project-level carbon data, better supplier engagement, and pushing responsible thinking through every brief.

If we could offer one piece of advice to our peers:

> **"Get under the skin of your operations, find the metrics that matter, and don't be afraid to get it wrong along the way."**

Practice makes perfect

Hannah Robinson, Business Development Event Manager at BMA House, shares: "From our perspective, obviously all of these requirements are just making us be a better business, to think more about what we're doing as an organisation and make better choices, to be ahead of the curve and enable us to share best practices to influence others to be better."

Lee Wateridge, Special Projects Director at Imagination, offers a similar perspective: "Although the first time round is hard, once you've done the circuit of them, and get into gathering and sorting the data, then they become fairly formulaic...

> **"Once systems are in place it becomes a standard practice, similar to financial reporting."**

One observation from **Troy Reynolds, Chief Experience Officer at Imaginneurs**: "Right now, the onus is on the big companies to get the most information from the smallest ones, but there's no onus on the small businesses to provide it. But there's no reason why a small business shouldn't be able to report on its Scope 1 and 2 emissions, you just need your bills".

> **Although it may be difficult to implement new processes and practices and it may feel like a burden, these requirements are here and they're here to stay. By the start of the next decade, they'll be part of the everyday. Accepting, adapting and preparing for them now is just good sense.**

Currently, no unified standard exists for measuring and reporting sustainability across events, making collaboration difficult and time-consuming. And whilst the events industry thrives on collaboration, misaligned expectations and inconsistent reporting requirements can lead to delays, frustration and missed opportunities across the full value chain.

Strong data practices can help overcome this complexity. By working together to raise the standard of measurement, we can make sustainability reporting more consistent and accessible across the sector.

FIND OUT MORE →

Insights

About the data in this report

Using data from our industry-leading platform, TRACE by isla, we're able to provide a comprehensive overview of the carbon emissions associated with events.

This report analyses data from nearly 1,000 events, which we believe is the largest aggregated dataset on event emissions recorded in Europe.

For the purpose of this report, we have selected events with the highest quality data to ensure emissions insights are represented as accurately as possible.

Every event counts – including yours.

TRY TRACE FOR FREE →

TRACE insights are based on user-submitted data, meaning the quality of insights is directly linked to the quality of input. We have identified key gaps in current measurement practices - particularly around material use, audience travel, waste reporting, and energy consumption. As a result, all data should be interpreted with an understanding that a margin of error exists at both individual and industry-wide levels. Improving data quality is an industry imperative, and we continue to work closely with our clients to strengthen data collection and reporting practices over time.

Key stats about the event data in this report:

- **954** events across **22** countries in Europe
- A total of **2,944** live days
- **9 million** in-person guests
- **95%** in-person events and **5%** hybrid
- **87%** of the events were indoor
- Activations were the most common event type (**44%**) followed by conferences (**15%**)
- Data exclusively from events held in **2024**

2022 vs. 2024: How does this compare?

In our first Temperature Check report, we calculated the average emissions per event to be 2 tCO_2e, based on data from 127 events held in the UK between April 2022 and January 2023.

In this report, which analyses data from 954 events held during the 2024 calendar year, the average emissions per event rose to 7.61 tCO_2e. This figure is nearly four times higher than the previous estimate.

We believe this increase reflects improvements in data gathering practices and greater measurement competency among platform users. However, it's important to note that even this figure is likely an undercount of true event emissions, as many events still do not capture all relevant boundaries in their reporting.

The average emissions per guest in 2022/23 were estimated at 6 $kgCO_2e$, compared to 4.12 $kgCO_2e$ in 2024. While this suggests a decrease in per-person emissions, we believe the change is due to the improved accuracy and representation that comes with more data, as opposed to decarbonisation efforts.

Benchmarks

For the first time, we can present industry benchmarks to guide event organisations on their journey toward decarbonising events.

Through detailed analysis, we have assessed:

- Emissions per guest
- Per event type
- Across key impact categories such as travel, catering, and materials.

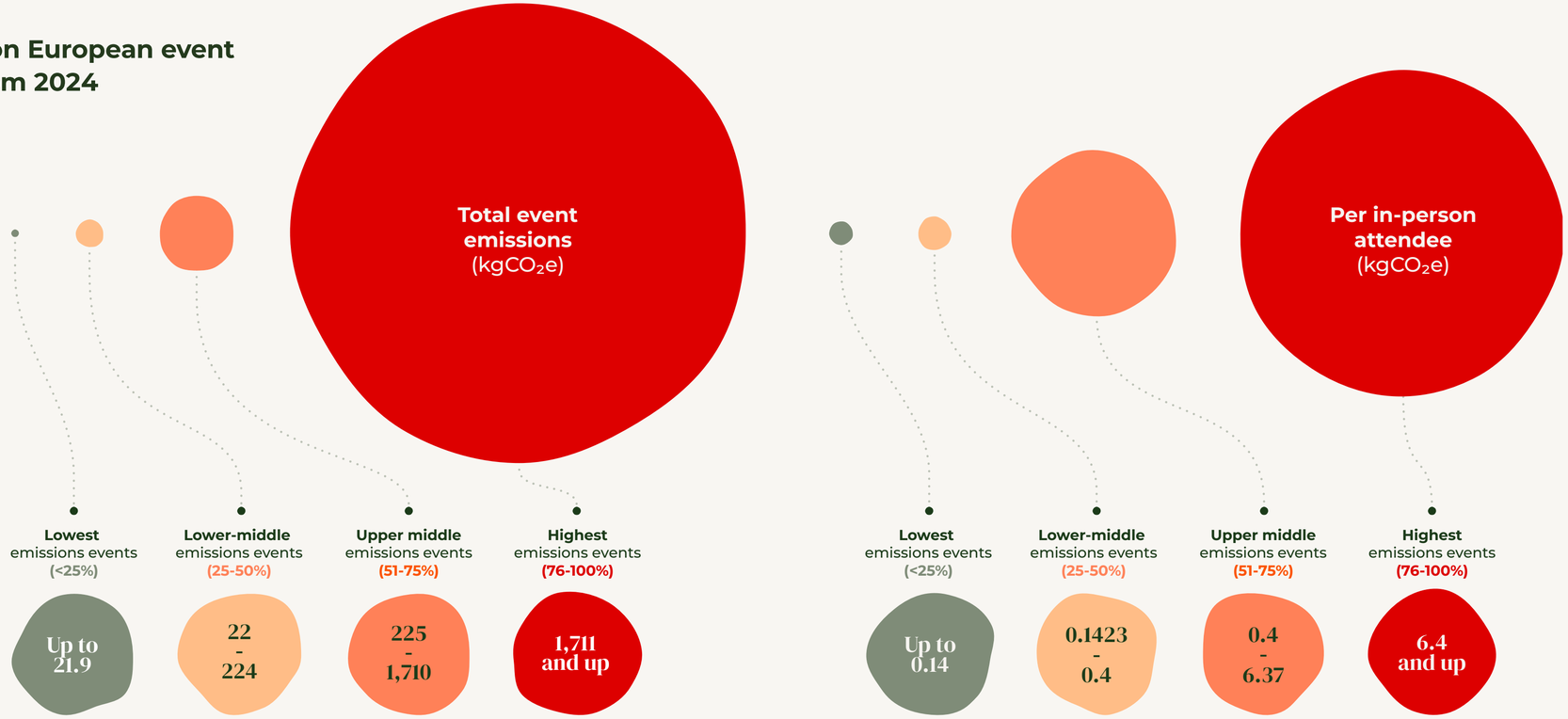
This gives an indication of progress for both individual events and the industry as a whole.

European event benchmarks

Represented here as a relative scale, from those who measured in the lowest 25% of emissions to the highest emitting events, the top 25%. Shown as both absolute emissions and a per person intensity metric.

These benchmarks should be interpreted with caution and as a guideline. They are based on the data available, and direct comparisons should be used with caution. The best benchmarks will be your own.

Based on European event data from 2024



INDUSTRY PERSPECTIVE

Comparable data for continuous improvement

TRACE user **Marie Simpson, Head of QHSE & Sustainability at Identity Group** reflects on why consistent measurement matters, and how this has helped them make progress:

“When we started measuring carbon and waste in our baseline year, measurement processes were new to everyone and as with all new systems it takes time to implement, embed and standardise.

Year-on-year, and now quarter-on-quarter, we have achieved detailed reporting across all of our event and business operations as measurement becomes routine.

Using TRACE by isla consistently now for two years on almost 70 individual and mobile programme events has given us consistency and confidence in our data, such that it can be analysed through the lens of continuous improvement.

It’s not just about measurement and reporting now. It’s given us clarity on categories of emissions to target and a level of granularity for different event types and sizes that helps us to define objectives. We can now provide event teams with the toolkits to have conversations with clients on sustainable choices that are supported by relevant industry data.”

Event emissions

Through analysis of data captured with TRACE by isla, we can now quantify the biggest contributors to event emissions.

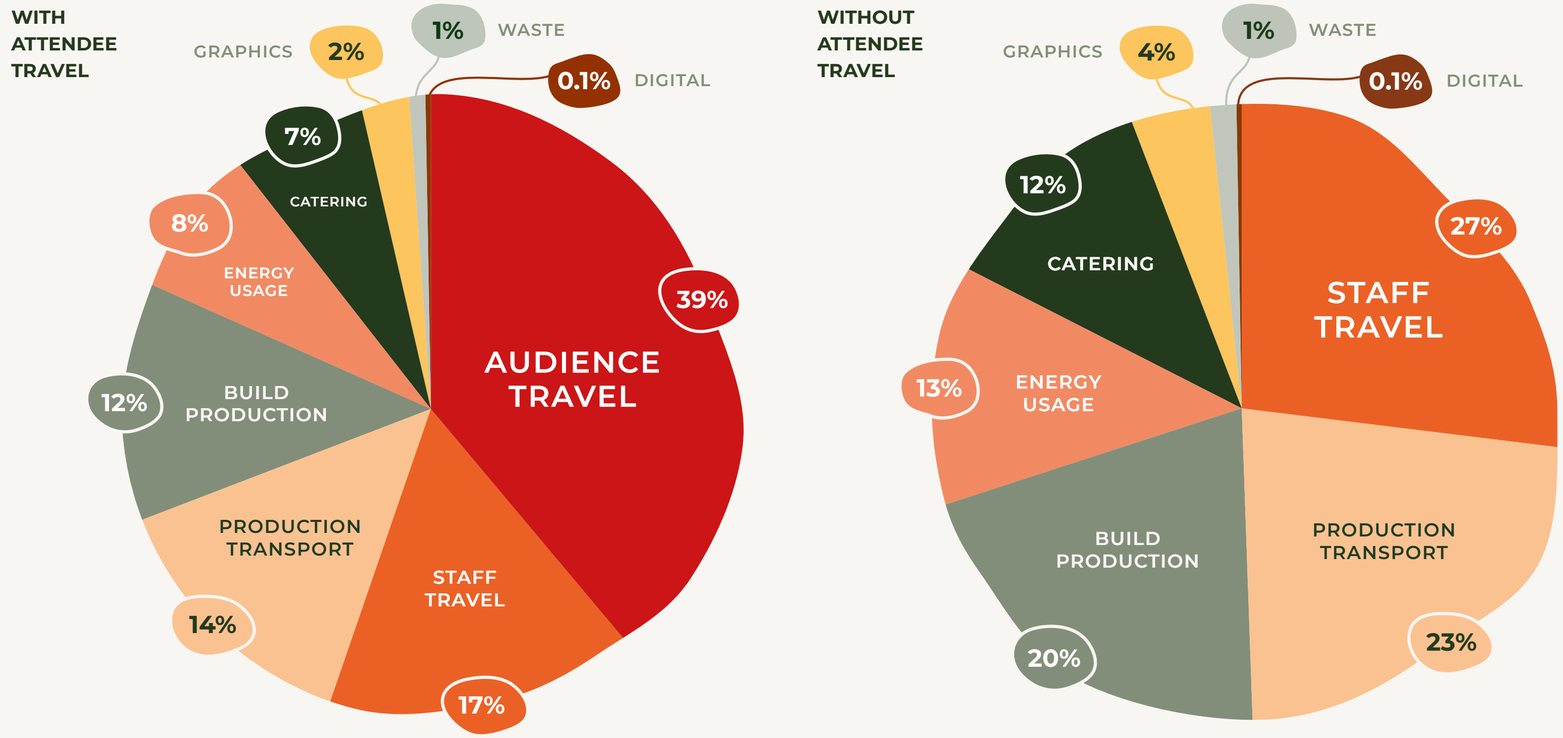
Audience travel is one of the biggest contributors to event emissions, yet it remains one of the least measured and hardest to control areas. The lack of reliable data and the perception that organisers have limited influence means it is often overlooked. But ignoring attendee travel doesn't make it disappear and failing to account for it could be considered greenwashing.

However travel is not the whole picture.

While audience travel is significant, 61% of event emissions recorded in TRACE come from other sources.

We need a balanced approach that acknowledges the impact of travel, while actively working to reduce it where possible, but also prioritises emission reductions across all areas of event operations.

Total emissions by event activity



A standardised practice to measure event emissions is essential to improving data quality. This goes beyond the calculation methodology and into the practical realm of measurement. Clear but collaborative responsibility for data collection must be established, ensuring that all aspects of an event's footprint are accurately captured.

As a response to this, isla will be piloting a standardised measurement approach. We are inviting organisers to find out more and consider participating in this.

FIND OUT MORE →

Event types and emission profiles

While benchmarks offer a useful snapshot of the average event in our sector, deeper patterns emerge when we look at emissions by event type.

- Exhibitions generate the highest overall emissions across all event types
- Activations appear to have the lowest emissions*
- Meetings and roadshows rank second lowest in emissions
- Emissions from outdoor events are higher than indoor events.**

*This may be due to missing audience travel data, as defining an "audience" for these events is more complex.

** This may be due to the transport and installation of temporary infrastructures and higher energy use resulting from generator power. Outdoor events average 26 tCO_2e compared to 5 tCO_2e for indoor events.

Different events = different footprints

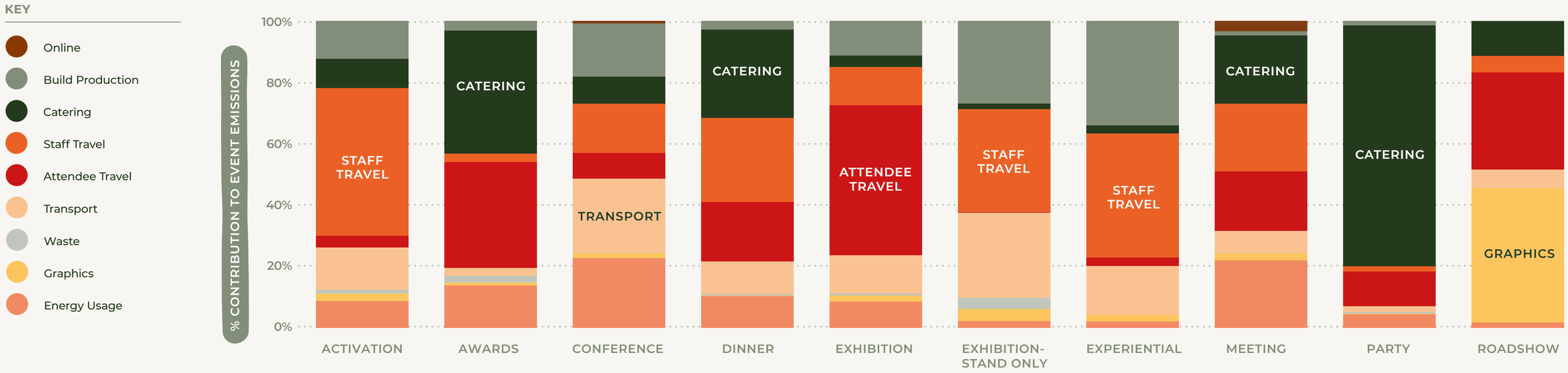
The data makes it clear: different event formats create different emission profiles. Where emissions come from - whether that's catering, travel, materials, or energy - varies significantly by event type.

- Parties have the highest proportion of emissions from catering, at 78.5%
- Activations see nearly half (48%) of their emissions coming from staff travel
- Meetings typically require no build or graphics, so have low emissions from these - 1.3% and 2.2% respectively. Consequently, waste emissions are also very low (0.1%).

This insight is a game-changer

Understanding the emission patterns across your event types means you can take smarter, more targeted action. Instead of applying broad, generic solutions, you can focus on the areas that matter most - maximising impact across your entire event programme.

Contribution of event activities to carbon emissions across event types



IMPACT FOCUS

Catering

Food dwarfs all other emissions related to catering with 98.6% of emissions coming from the food itself, rather than serveware used. This means there is a huge potential for reducing carbon emissions in events by planning plant-forward menus.

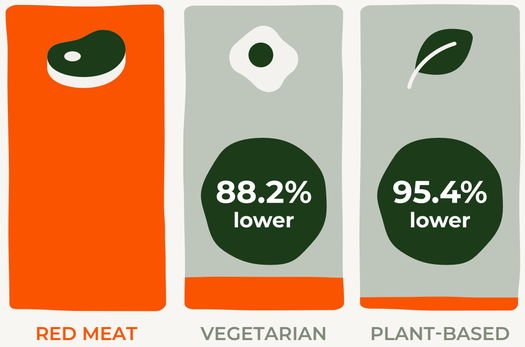
Plant-based: a ready-made solution

Events often cite sustainability as a challenge, but a plant-based menu is a simple and easy to activate solution. Offering plant-based meals doesn't require anyone to adopt a new lifestyle - many events span a single day or just a single meal. It's a small act with a big impact.

More importantly, events are powerful cultural moments. They're hotbeds of creativity, education, and influence. They can play a critical role in normalising plant-based food and encouraging guests to try something new. If we're serious about reducing emissions, then food must be part of the conversation.

Organisers should aim for at least 56% of their event programme to be meat-free, in line with current industry benchmarks in TRACE.

% Lower Emissions vs. Beef/Lamb

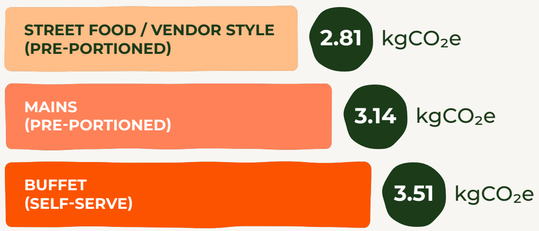


A full plant-based swap for all red meat meals recorded in the dataset would have saved 714 tCO_2e - equal to 6.5 million bananas, or the number of bananas wasted in the UK every five days!

Other influences on food emissions

Beyond the actual food itself, the way food is served impacts emissions too. Buffets have the highest emissions of all meal types, as they are the largest portion of food per person and portion sizes are frequently uncontrolled. As a result, this often leads to larger volumes of food wasted on both the plate and at service.

Serving types and emissions profile

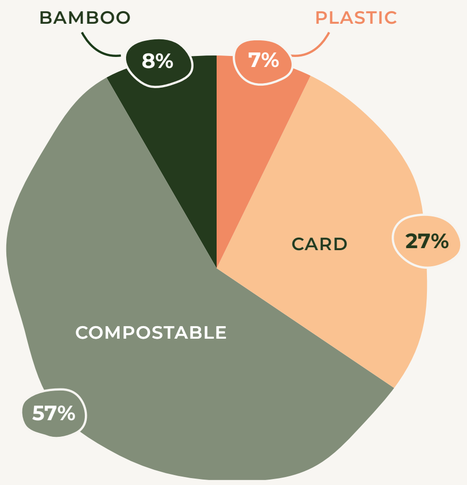


Other associated impacts

Although ingredients have the highest impact on food-related emissions, there are still impacts from ancillary elements such as serveware.

37% of events are using at least one type of single use serveware totaling nearly half a million units and over 7 tonnes of waste.

What type of single use is being used?



The data shows a clear preference for compostable serveware which is often viewed as the more responsible option. However, in most cases, specific waste channels are required for proper management of compostables, and these are not managed as part of standard waste practices.

Even when appropriately managed, compostable serveware is a single-use product and part of a linear and emission generating system.

Operationalising for circularity and reusables should be prioritised over swapping between single-use materials.

2022 vs. 2024: How does this compare?

In 2022/23, 55% of menus recorded in TRACE by isla were meat-free. This trend has not only held but slightly increased in 2024, with 56% of meals now meat-free. Within that, 17% were fully plant-based.

That 17% figure tracks above national averages. In the UK in 2024, just 12% of the population reported following a plant-based diet, with numbers dropping to 2.1% across Europe. However, 11% of Europeans now identify as meat-free, even if not entirely plant-based - suggesting events may be slightly ahead of the curve when it comes to dietary inclusivity.

It's well established that shifting toward meat-free and plant-based catering is one of the simplest, most cost-effective ways to cut event emissions immediately. Despite this, the data shows only marginal progress over two years.

INDUSTRY PERSPECTIVE

How BMA House's menu shift is delivering real ROI

In a bold move that underscores its commitment to sustainability and innovation, BMA House has transitioned its conference and event catering from bespoke menus to thoughtfully curated set menus. While the change is simple in concept, the impact is both powerful and far-reaching - delivering measurable returns for the venue, its clients, and the planet.

A smarter approach to sustainable catering

BMA House has long championed green practices, earning a reputation as one of the UK's most sustainable conference and event venues. This latest initiative is rooted firmly in that ethos.

By serving a co-ordinated menu to all events across the venue on any given day, BMA House is significantly reducing food waste

- a critical challenge in the hospitality industry.

"When you're preparing ten different menus for ten different events, the margin for waste is high," says **Hannah Robinson, Venue Manager at BMA House**. "Switching to consistent menus has enabled our chefs to plan more efficiently, order with precision, and eliminate the guesswork that often leads to surplus."

The venue introduced this shift in stages, initially removing red meat from the offering before moving to standardised menus.

In that time, red meat has only been served once as part of a hot fork buffet, demonstrating a consistent commitment to more sustainable, lower-impact ingredients.

Since rolling out the set menu approach, BMA House has sold hot fork buffet packages 820 times over two years, compared to just 60 bespoke options in the same period - clearly indicating strong client adoption, welcoming this change as an aid to event planning.

A win for clients, too

But sustainability isn't the only benefit.

The change is also delivering clear financial ROI for both BMA House and its clients.

By streamlining purchasing and focusing on seasonal, readily available ingredients with low food mileage, the venue has been able to drive down procurement costs. Clients benefit from BMA House prices being able to limit some of the impact of the large produce price rises seen in recent years. They can remain extremely competitive whilst still delivering extremely high quality catering.

Today, a set menu day delegate rate (DDR) comes in at £95, compared to £105 for a bespoke menu - a tangible saving for clients. While it's difficult to isolate exact purchasing savings due to wider cost fluctuations in the food supply chain, internal cost analyses tell a clear story. A comparison of red meat versus chicken options - the latter being one of the main proteins on the current harmonised menu - shows a significant margin advantage. Despite red meat dishes being priced higher, they actually yield a lower gross profit compared to chicken. This makes the menu more cost-effective and supports BMA House's financial sustainability.

Clients are noticing the difference. Not only are they benefitting from reduced catering costs, they're also enjoying elevated menus that reflect the creativity and expertise of BMA House's culinary team. With seasonal ingredients at the forefront, the new set menus are vibrant, flavourful, and anything but generic.

> **"We've found that working within set parameters actually gives our chefs more freedom to innovate. The focus shifts to what's best in season, and we get to build something that really celebrates great ingredients. It's a win-win."**

Measurable results and positive reception

Feedback so far has been overwhelmingly positive. With 93% of hot fork buffet packages ordered as set menus, the vast majority of clients are embracing the change. Delegates have noted the improved consistency and creativity in their meals, while event planners enjoy the clarity and cost-efficiency the model brings.

This menu evolution is just one part of BMA House's broader sustainability journey, and the message is clear: sustainability doesn't have to mean sacrifice. With the right strategy, it can elevate the guest experience, deliver tangible value, and set a new standard for the industry.

VISIT BMA HOUSE →

IMPACT FOCUS

Energy

Data analysed suggests that while there are positive steps towards decarbonisation, the pace of change remains slow.

Renewable energy

Only a third of events in TRACE recorded a renewable energy tariff, meaning the majority are still using standard tariffs.

The data shows the emissions from events that use renewable energy tariffs are 83% lower on average than those on a standard tariff (294 $kgCO_2e$ compared to 1,780 $kgCO_2e$).

Renewable energy tariffs indicate a commitment from the venue to use their buying power to invest and be part of the green transition. However, it's important to note that some venues will find it easier to use renewable energy than others due to various factors such as age and building type.

Energy use by event type

Energy use is not just about infrastructure - event design plays a key role too.

- By event type, **exhibitions and conferences** have the highest energy-related emissions
- Outdoor events consume **twice the energy** of indoor ones (0.94 vs. 1,9 tCO_2e)
- Combined indoor/outdoor events **have the highest energy emissions** - an average of 3.6 tCO_2e per event.
- Just 11% of activations used renewable tariffs compared to almost half of all meetings (47%).

We can derive from this data that complex event setups require more energy-intensive infrastructure, particularly for lighting, temperature control, and production equipment and transportation.

Understanding the hotspots for energy consumption allows for more targeted reduction strategies, starting at the planning stage.

Challenges in measuring and report energy data

Infrastructure is a major prohibitor in the supply of accurate energy data. Often venues are not organised in a way that they can provide sub-metering for the space hired - especially where retrofitting is required.

When a venue is unable to supply usage data, organisers can still measure (and improve the accuracy of their results) by measuring the energy use of equipment. This will require supply chain engagement in pre-production.

A consistent challenge is that unclear accountability leads to confusion as to what data to provide (for example - energy use in a kitchen that serves both your event and other activity across the venue). Establishing clear boundaries is essential to simplifying energy measurement.

67.5% of survey respondents said that venues are responsible for measuring the carbon footprint of energy, and 95% of venue respondents agree. A clear action is for venues to provide this data as standard, whether it is estimated or actual data.

Temporary power

Temporary power accounted for an average of 85% of energy-related emissions at events where it was used. Unsurprisingly, events using temporary power were mostly outdoor events (62%).

69% of these events relied on red diesel generators, a high-carbon and high-pollution energy source that remains the default choice in temporary event power, despite the growing availability of generators powered by renewables.

For events using temporary power, emissions from energy climbed to 15% from 12% of total event emissions, compared to those using only mains power.

2022 vs. 2024: How does this compare?

In 2022, 57% of energy data was estimated, highlighting the challenges of capturing accurate information on energy use. For this report, however, we have analysed 350 events with recorded energy data - a data set three times larger than in 2022, demonstrating clear progress in measurement practices.

Despite this improvement, energy remains a difficult area for accurate reporting: these 350 events represent only a third of the total events in the dataset.

Nonetheless, the larger sample has enabled greater insights compared to 2022, allowing us to identify differences in energy sources, usage between indoor and outdoor events, and variation across event types.

INDUSTRY PERSPECTIVE

SHOWPOWER

Battery Energy Storage Systems

2024 saw a seismic change in how Battery Energy Storage Systems (BESS) were deployed across the live events sector. Whilst generator / BESS hybrid installations for managing base loads remained at the fore, a handful of brave clients, including Global Citizen, Lollapalooza, Coldplay and Massive Attack chose to replace conventional generators with BESS for their stage power.

Finally, the penny seems to have dropped: inverter driven technologies are not merely comparable to electro-mechanical systems when dealing with variable stage load profiles, they are in fact more suited to these kinds of applications and provide better power quality.

For example, there is little to no voltage drop when a BESS is operating in island mode, frequency remains stable even with the sharpest of load steps and the issues typically associated with electro-mechanical systems versus reactive power (kVAR) are 100% removed.

Technical considerations aside, the main driver for BESS is the ability for artists and organisers alike to connect to the lowest carbon energy sources available.

Mains power = equals lower emissions

For too long, the events industry has been sold the idea that biofuels are the most sustainable option for temporary power. But that assumption doesn't hold up - and it's something Showpower has challenged from day one.

The belief in biofuels often stems from a narrow understanding of how modern energy systems work. While fossil fuels haven't disappeared from the grid, *their share is shrinking every year.* In their place, we're seeing rapid growth in renewables, low-carbon technologies, and clean energy imports. The energy mix is changing - and grid power is getting cleaner all the time.

More importantly, when mains power is available, it's the most efficient and sustainable option by far. You only use (and pay for) what you consume. There's no transport, no delivery emissions, no wasted fuel.

Generators, on the other hand, come with hidden impacts. They need to be delivered to site, adding freight emissions, and kept running whether or not you're actively drawing power. And while biofuels might sound like a greener alternative, they still involve combustion, fuel supply chains, and higher costs.

The most cost effective and environmentally responsible approach? Use the grid where possible, and when batteries are needed, charge them from existing mains infrastructure. It's lower impact, more cost-effective, and aligned with the energy future we should be building toward.

80 – 100% emissions savings

The inclusion of permanent and/or temporary onsite renewables alongside a mains connection can further help to reduce the carbon intensity of your energy consumption and make emissions savings of between 80 – 100% when compared to a business-as-usual model of installing diesel generators.

Where mains supplies are not readily available, then using correctly sized generators that run on alternatives to diesel and operate at 60 – 85% of their generation capacity during a charge cycle, is the next best option.

Reducing pollutants and price

Using a grid-connected BESS will not only significantly lower your greenhouse gas production, it will also dramatically reduce your tailpipe emissions, which are airborne pollutants such as nitrogen oxides (NOx), carbon monoxides (CO) and particulate matter (PM).

From a business case point of view, there will be significant savings:

Up to 100% savings
GENERATOR RENTALS

Approximately 50% savings
TRUCKING

60 - 100% savings
FUEL CONSUMPTION

Energy use transparency

Using a grid connected BESS can also make an event's complete energy costs more transparent. During the power advancing process ahead of specifying a battery system, careful calculations need to be made as to a show's total energy consumption.

Consumption estimates allow a power contractor to calculate how much energy will be required to recharge the system and accurately predict the full show costs based on a venue's energy tariff.

Whilst power contractors can supply fuel estimates for generator consumption, they are often reluctant to do so and their predictions can be wildly inaccurate.

The grid connected BESS operational model will undoubtedly be welcomed by organisers, as it offers complete oversight on the actual value of the power contract.

VISIT SHOWPOWER →

IMPACT FOCUS

Materials

While build production and graphics are central to creating unique experiences, they also significantly impact emissions

- Exhibitions generate the highest material emissions, averaging 6.5 tCO_2e per event, by default placing them in the highest emissions quartile of the benchmark
- Outdoor events produce more material emissions than indoor events (3.9 vs. 2.7 tCO_2e).
- Tech (5.6 tCO_2e) and Pharma (2.2 tCO_2e) events have the highest production emissions per event - respectively accounting for 8% and 7% of events in the dataset.

Virgin material usage

The reality in events:

- 75% of materials recorded in TRACE were from virgin sources, meaning they were sourced brand new.
- Meetings used only 27% virgin materials while activations relied on 84% virgin materials.

However, data gaps make it difficult to assess how circular the event sector truly is. Many events don't fully track the lifecycle of materials. Despite being a circular practice, hiring of infrastructure and equipment is often not recorded. Without this data, we're missing a clear picture of how events are contributing (or not) to material circularity.

Top 3 virgin materials used:

Top 3 reused, repurposed or hired materials:

Circularity as a solution

Sustainability is more than carbon. It's about rethinking how events interact with materials, ecosystems, and biodiversity.

Circularity refers to a system designed to minimise waste, maximise resource efficiency, and keep materials in use for as long as possible. Instead of the traditional linear model of take-make–dispose, a circular approach aims to design for longevity, redistribution and minimal waste and pollution.

In practice for events, circularity could involve hiring rather than buying equipment, designing builds for disassembly and reuse, using recycled or repurposed materials, and tracking material lifecycles to reduce unnecessary consumption. Circularity is a key focus of incoming EU legislation, making it both an environmental and business priority.

Incoming legislation is likely to accelerate a shift to more circular practices. The EU's Digital Product Passport (DPP) will require suppliers to trace and disclose material organs. The EU Packaging and Packing Waste Regulation directly aims to reduce virgin material use in packaging. Additionally the Nature and Restoration Bill may increase the cost of natural raw materials like virgin timber, and therefore discourage use.

Improving material circularity isn't just a win for sustainability, it's becoming a business imperative. Reducing the dependency on virgin materials will improve cost efficiency, support compliance and build resilience into your supply chain.

Using less means fewer emissions

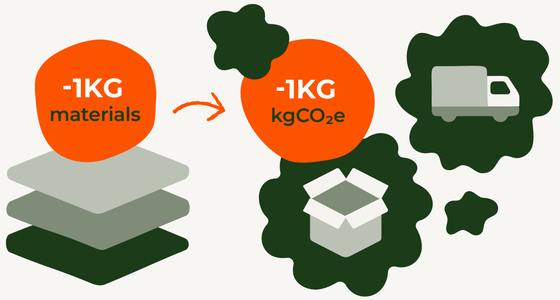
Correlation in the data shows that using lighter or fewer materials (by weight) generally means an equivalent reduction in carbon. For every 1kg decrease in material use, emissions also decrease by 1 $kgCO_2e$. This comes from a combined saving of embodied carbon emissions (0.53 $kgCO_2e$.) and savings in freight emissions (0.49 9 $kgCO_2e$.).

2022 vs. 2024: How does this compare?

In our first *Temperature Check* report, we were unable to draw meaningful insights from material usage data. The dataset was small, data quality was limited (with 61% of material data estimated) and few reliable conclusions could be made.

In this year's report, we have access to a significantly larger and higher-quality dataset. This progress reflects clear improvements in measurement practices across the sector and is a positive trend that we expect to continue.

As data quality strengthens, we anticipate being able to deliver deeper, more actionable insights to guide strategic decisions on circularity and decarbonisation.



INDUSTRY PERSPECTIVE

Emota

How Emota's EnviroPlan cuts waste and cost, without compromise

The exhibition industry has a waste problem. We've all seen it - materials used once, then scrapped. Beautiful builds with short lifespans. Emissions piling up with every shipment, every install. For years, this has just been "how it's done."

But Emota didn't buy that. Instead, they created EnviroPlan, a practical, creative, and results-driven approach that proves you can design smarter, waste less, and still deliver impact. Clients are noticing. And it can potentially save them money, too.

More than a pretty stand

EnviroPlan doesn't stop at the booth. It's a complete methodology that starts with sustainability and ends with better outcomes for everyone.

Yes, it tackles materials - what they are, where they come from, and what happens to them next. But it also **takes on the full system: energy use, rigging, furniture, crew logistics, transport, even how waste is handled on-site.** The goal isn't just to look good. It's to reduce impact everywhere.

That means every project becomes a chance to reduce, reuse, and rethink:

- Can we spec materials that are recyclable, at worst?
- Can we cut carbon by designing for efficient shipping?
- How can this booth configure over three shows, not just one?

It's not just about sustainable design. It's about designing sustainably, from the first concept through every touchpoint on the show floor.

Clients are choosing better, and benefitting

This isn't just something Emota is doing for the sake of it. Clients are asking for it, choosing it, and realising it's a smart business decision. **EnviroPlan has not only saved clients over 70% in CO_2e emissions when compared to a traditional build but also achieved budget savings of over 30% in some instances.**

Take the now widely-used cardboard structural system, developed with suppliers and used across a range of clients. It's rigid, light, beautifully printable, and recyclable. One pharmaceutical client used it to build a full booth that could be transported easily, installed quickly, and dismantled with almost no waste. **It saved on build costs, install time, and even fuel.** Another global client ran a multi-year programme using modular toolkits designed to be reconfigured, not rebuilt. Less material, less waste, less stress - and better value.

Reduced impact, but still remarkable

A common fear is that sustainable design means beige boxes and compromise. But the truth? Smart constraints often push creativity further. EnviroPlan leans into that. It treats raw materials - structural cardboard,recycled plastic, woodwool, even acoustic fibre - not as things to hide, but as part of the story. They show up in the aesthetic, becoming talking points, sparking curiosity and reflecting the values of the brand on show.

Our creative teams aren't limited. They're challenged - in the best way - to deliver a design that does more with less.

Looking beyond the build

One of the biggest shifts Emota's making is treating sustainability as a systems challenge, not a design add-on. That's where the real gains are. A stand is only one piece. So EnviroPlan zooms out. It looks at:

- Lighting, AV, and rigging setups: Can they be streamlined to reduce draw?
- Flooring and furniture: Are they reusable, modular, or sourced locally?
- Logistics and crew: How far are people and materials travelling - and could that be reduced?
- Supplier networks and environmental credentials: Are they aligned with the project's values?
- Waste streams and energy use onsite: Can they be measured, improved, reused?

This is lifetime design thinking. Not just "how do we make a stand," but "how do we make the entire experience more sustainable - before, during and after the show?"

EnviroPlan is not a checklist, but a mindset. It's one that clients are starting to expect and that audiences notice.

Award winning results

EnviroPlan is already delivering award-winning results. At the recent Conference News Agency Awards, Emota won Sustainability Pioneer for EnviroPlan, in a highly competitive category - demonstrating recognition within the industry of a shift to this holistic approach to sustainable design and project delivery. And now it's expanding. Emota is applying the same thinking to live production, logistics, and broader event operations.

The model is simple, but powerful: strip out waste, design for reuse, use better materials, think long-term, and look everywhere for smarter decisions. This isn't about being perfect - it's about doing better and showing what's possible in an industry that's long overdue for change.

Sustainability doesn't mean compromise. Done right, it means efficient creativity, and work that's not only exciting, but worth being proud of.

VISIT EMOTA →

IMPACT FOCUS

Waste and Resource management

Events are notoriously wasteful, and excessive consumption is often the first thing attendees notice when questioning an event's sustainability performance. But effective resource management remains one of the most visible sustainability challenges. Whether it's discarded branding, leftover materials, or single-use serveware, attendees and stakeholders notice when resources are mismanaged.

The data shows most event materials aren't being recovered, repurposed or recycled properly. Over half of materials are still used on a once-off basis.

The problem itself is far beyond the emissions, it highlights a critical gap in resource management.

While energy recovery reduces the volume of waste going to landfill, 13.7% of event-waste is still heading here. These resources heading to landfill account for 87% of waste-related event emissions.

Event materials and their end-of-life

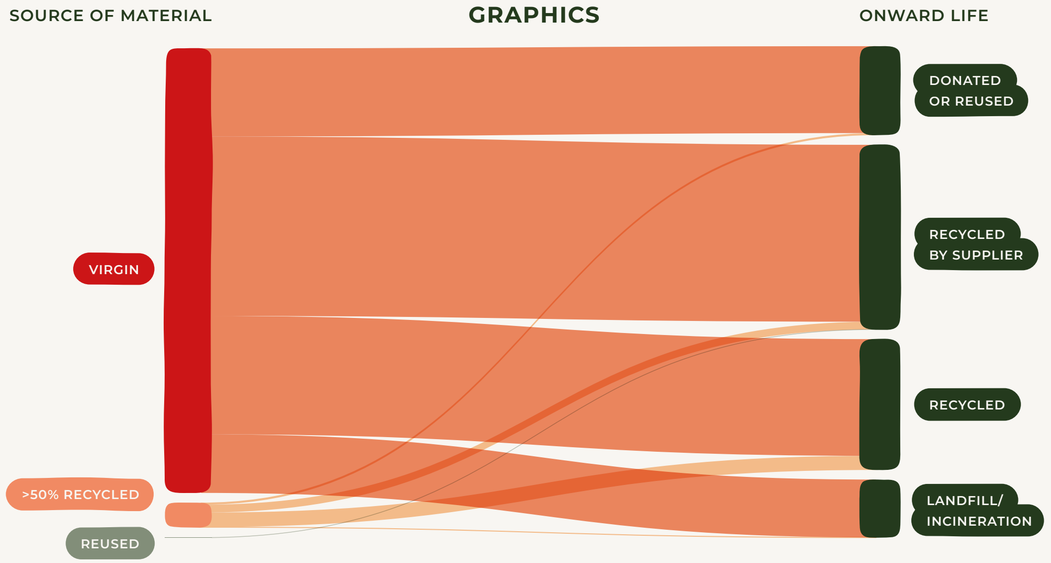
Although recycling is an improved end-of-life compared to landfill or incineration, most materials are still used just once. We've tracked the flow of production and graphic materials which shows a strong trend for single-use virgin-materials.

2022 vs. 2024: How does this compare?

Waste data is improving. In 2022, less than two-thirds of events captured and measured waste data. In 2024, that number has jumped to 72% of events.

However, significant challenges still exist in collecting accurate waste data, so understanding the true impact of event waste is still elusive.

What is the flow of production materials?



INDUSTRY PERSPECTIVE

Unlocking value through smarter resource management

The events industry is a resource-heavy sector, generating vast amounts of discarded materials, excess branding, and one-time-use assets. The challenge isn't just about waste, it's about mismanaged resources. Every item that goes unused represents a financial loss, a missed social opportunity, and an environmental burden.

Yet, with the right approach, these resources can extend beyond the event, delivering lasting social impact while significantly reducing carbon emissions.

Resource & asset management at Paris 2024 Olympics

With only 13% of events achieving zero-to-landfill, the events industry faces significant waste challenges. During the Paris 2024 Olympics, a major client aimed to ensure their hospitality events at Le Bristol Paris aligned with their sustainability commitments. They partnered with Event Cycle to develop a resource management strategy that maximised social value and minimised environmental impact.

Event Cycle worked closely with the client to identify useful and valuable materials from the event including furniture, graphics, and stationery and ensured they were redistributed strategically and locally. By partnering with charities, community groups, and social enterprises in the Paris region, Event Cycle extended the lifecycle of these materials, reducing waste and creating long-term benefits for the community.

Impact Summary

982 items
REPURPOSED FOR COMMUNITY USE

£28,293.02
IN SOCIAL IMPACT VALUE GENERATED

991.49 $kgCO_2e$
EMISSIONS AVOIDED THROUGH LANDFILL DIVERSION

57
PIECES OF FURNITURE REDISTRIBUTED

11
UNITED NATIONS SUSTAINABLE DEVELOPMENT GOALS (SDGS) SUPPORTED

Social and environmental benefits

This initiative transformed event resources into valuable assets for multiple local organisations:

- **Colombbus:** A social enterprise supporting **digital education and professional integration** received chairs and stationery to equip training spaces.
- **L'Œuvre Falret:** Specialising in **mental health and social reintegration**, the charity repurposed event bar furniture into a training facility for individuals entering the hospitality industry.
- **Société Protectrice des Animaux France:** The national animal welfare organisation received **first aid kits, cooling towels, and umbrellas**, improving shelter conditions for animals in extreme temperatures.
- **Couleurs et Senteurs (Régie de Quartier 19e):** A community-driven urban initiative used furniture and mirrors to **enhance its neighbourhood workspace and support employment program**

By integrating sustainability driven resource management, the Paris 2024 Olympics project shows how a strategic approach in events can prevent unnecessary landfill waste, support communities, reduce emissions and drive industry wide change.

5-Step guide to better resource management

1. **Plan for circularity early:** Engage with repurposing partners before the event to ensure efficient material redistribution.
2. **Identify valuable assets:** Prioritise furniture, wood, building materials and signage for reuse and repurposing.
3. **Partner with local organisations:** Connect with charities, social enterprises, schools and community groups to maximise impact.
4. **Track & measure impact:** Quantify carbon savings, financial benefits, and social impact value to showcase success.
5. **Embed circular economy principles:** Work with suppliers to design event materials with reusability in mind.

VISIT EVENTCYCLE →

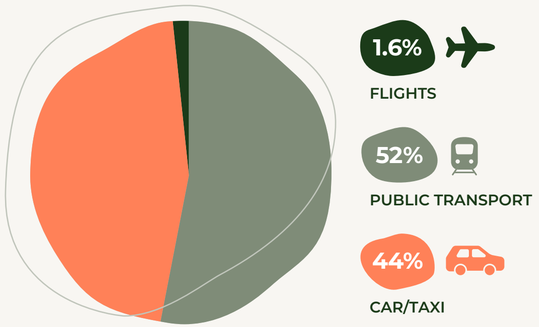
IMPACT FOCUS

Travel

Travel is still the biggest challenge and remains the largest contributor to event emissions. While some level of travel is unavoidable, the data shows clear opportunities to make it more sustainable.

Travel behaviours

In positive news, more than half of all recorded trips were taken by public transport.



Across Europe, a high proportion of public transport journeys are expected due to strong rail networks and cost-effective pricing.

However, flights remain the biggest problem: **air travel accounts for 77% of total travel emissions** - despite representing only 1.6% of journeys. This means a small fraction of travel is responsible for the vast majority of emissions.

While audience travel is a major emissions driver, it remains inconsistently reported.

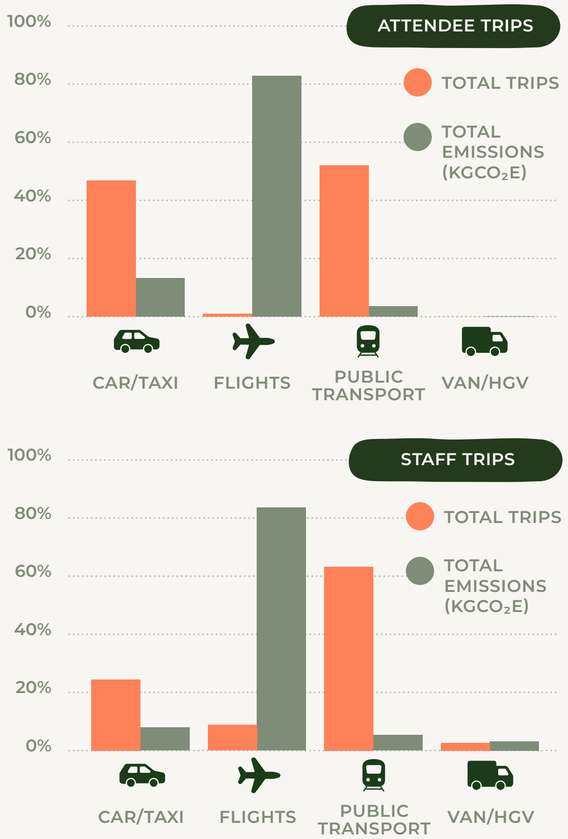
Only **31%** of events in TRACE included audience travel data, yet **71%** of survey respondents agree organisers are accountable for measuring audience travel.

This gap may reflect the types of events captured in the dataset. Roadshows or co-located activations, where audience travel is often out of scope, often have no data record. This may be because attendees are already on site or their participation cannot be clearly attributed to a single event.

Staff are more likely to travel by public transport (**69%**) than audiences (**52%**) which is a significant difference.

Changing behaviour matters. Shifting just *10%* of audience trips from private cars to public transport could save *350.8 tCO_2e* - equivalent to the annual laundry emissions of more than *2,800 households*.

Number of journeys for each type in total with total emissions



Audience travel data should be treated with caution. TRACE relies on user-generated data and while many boundary methodologies recommend including audience travel, there is currently no mandate or standardisation around what must be measured and practices vary widely.

Corporate travel policies should apply wherever event professionals are travelling - whether as organisers, attendees, or suppliers. Hosted Buyer programmes should prioritise lower-emission travel options.

2022 vs. 2024: How does this compare?

Most significantly, the scale of the data set we're working with has increased, from which we can more confidently pull trends and make decisions.

- In 2022, over 10,000 staff journeys were measured, in 2024, over 50,000 journeys were measured in TRACE.
- 50% of staff journeys used public transport in 2022, in 2024 this number has risen to 69%.
- 2022 TRACE captured 19,000 audience journeys, in 2024, this was over 500,000 journeys, providing a significantly larger dataset to analyse.

IMPACT FOCUS

Production transportation

Production transport is the third highest contributor to event emissions, yet it can often be overlooked as a sustainability strategy.

Events with large builds have the highest freight emissions. For example, the average freight emissions from exhibitions was 5.9 tCO_2e/event, compared to just 0.09 tCO_2e for meetings and awards.

Freight choices are entirely within the control of event teams, making it a potentially powerful lever for reducing event emissions. When it comes to tracking and measuring, **53%** of our respondents believe production transport should be measured by suppliers - and **68%** of suppliers agree.

Cleaner fuels exist, but uptake is slow

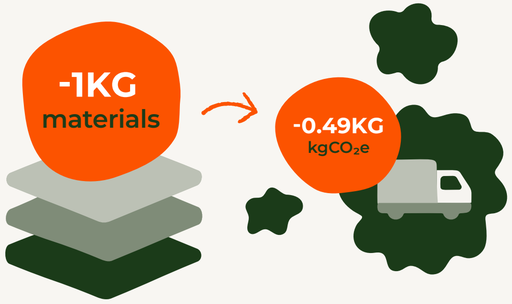
85% of freight trips still rely on diesel - the highest-emitting fuel type. Articulated vehicles and 17-tonne lorries make up 37% of diesel trips, but accounted for 58% of the associated emissions.

- Biodiesel could cut emissions substantially, but it's currently only used in 2.5% of trips, likely because of its higher cost.
- Electric vehicles (EVs) have the lowest emissions, yet only 1.7% of trips use EVs as this is limited to smaller vans and cars.
- Larger EVs face challenges including limited range, long charging times, and insufficient infrastructure, particularly for heavy or long-haul journeys.

Using petrol instead of diesel could save up to 10% of emissions, while using an EV could save up to 70%. While engine-technology is catching up, event design is the best place to take action to reduce emissions from production transport.

Reducing material use will reduce freight emissions

Making choices that require less to come to site will have a knock on impact on your freight emissions, even if the transition away from diesel is more challenging and longer term. For every 1kg of materials you can reduce from your build, you'll save on average 0.49kg in emissions.



Reducing the build for your event so that it will fit in a 7.5t instead of using a 17.5t truck will decrease your emissions by 50% for the same journey.

This might mean reducing material usage or choosing venues with supporting infrastructure already in place - such as in-house catering facilities to avoid the need to transport kitchens to site, or site wide mains power connections to reduce the volume of temporary power on the road.

5 steps to reducing freight emissions in the near-term

1. Switch to "green" fuels wherever possible.
2. Use the appropriate vehicle size for the job (smaller vehicles emit up to 50% less CO_2 per kilometre than larger lorries, especially over short distances).
3. Explore alternative modes such as rail, shipping, or cargo bikes.
4. Source locally and reduce build volume to reduce travel distances.
5. Consolidate loads wherever possible, including between suppliers.

With thoughtful planning and smart choices, freight is a key area where the event sector can drive meaningful emissions reductions.

2022 vs. 2024: How does this compare?

In 2022 - one third of production emissions recorded in TRACE were from air or shipping freight.

In 2024, this dramatically reduced to 8%, with overland transport accounting for 92% of production transport emissions.

This may indicate progress with significant reduction in air freight, however it is important to note that data from our first report considered events only taking place in the United Kingdom which may have a greater requirement for air and sea freight, particularly from organisers based outside of the UK but activating within it.

Beyond carbon: Sustainability in practice

The transition to a low-carbon, resilient event sector depends not just on measurement but on action. To understand how organisations are embedding sustainability into their operations, we ran a survey with 249 industry professionals and carried out two in-depth focus groups.

Together, the findings provide insights into motivations, challenges, and progress on sustainability initiatives.

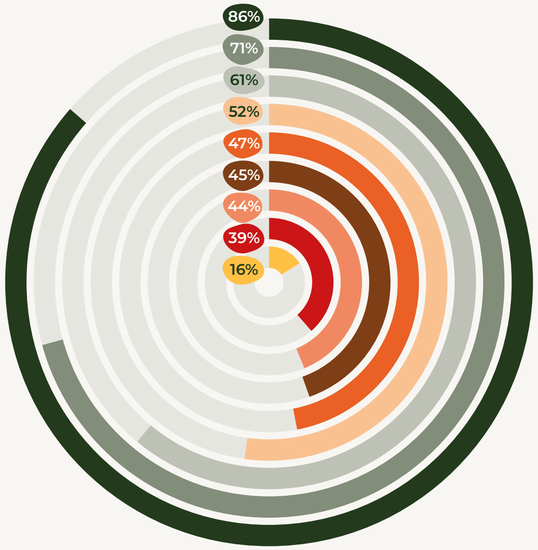
The focus of sustainability efforts

According to our survey, if people had to choose just one action to focus on in sustainability right now, the most popular is measuring emissions from **event activities**, with 18.47% of respondents.

Motivations

From ethics to economics, the drivers behind sustainability action are varied - but values are clearly leading the way. Event professionals are most motivated by a sense of moral responsibility, followed by the desire to protect brand reputation and meet stakeholder expectations. While regulatory compliance and risk mitigation also feature, it's the human and reputational factors that are currently doing the heavy lifting.

What are the main goals and motivations that event professionals currently have for improving sustainability performance?



KEY

- Ethical and moral reasons
- Brand reputation and public image
- Meeting client or partner expectations and requirements
- Responding to consumer or customer demands
- Gaining a competitive advantage
- Compliance with or preparing for regulation
- Mitigating climate-related risks such as supply chain disruptions
- Attracting and retaining staff
- Cost savings

Ethical and moral responsibility

The leading motivation for improving sustainability performance in the events industry is ethical and moral responsibility, with 86% of respondents citing it as a main driver. Many organisations acknowledge that events have an undeniable impact on both the planet and society and that taking meaningful action is not just a business task, but a fundamental responsibility.

And yet, in the world of business, ethical motivation doesn't always translate into action. This disconnect is critical to understand, and possibly the key to unlocking the scale and pace of change we urgently need.

Will things accelerate as legal requirements tighten and the cost of unsustainable practices rises? Do we have to wait for that pressure to build? Or could something as simple as shared-value and peer-expectation help us close the action-gap? If we truly feel sustainability is a moral imperative and not just another item on the to-do list, then that shifts the conversation from compliance to conviction and from optional to essential.

Consumer and societal expectations

Sustainability is no longer a niche concern from a few passionate attendees, it's an expectation. 71% of respondents said brand reputation was their main motivation for improving sustainability performance. 52% of respondents cited consumer and customer demand as a main motivator.

This finding is consistent with a 2024 Eventbrite report [1] which found that 70% of attendees felt happier attending sustainable events, while 74% were willing to pay extra for them.

Consumers are actively seeking events that align with their values, and brands that fail to respond risk losing audience engagement and credibility.

1 Eventbrite, 2024

The growing influence of legal requirements and voluntary commitments

Legal compliance is a proven catalyst for action in the events sector. Our data shows that organisations legally required to report on sustainability are:

twice AS LIKELY to measure their full carbon footprint (Scopes 1, 2 & 3)

twice AS LIKELY to have set carbon reduction targets

more LIKELY to use technology for monitoring, have a dedicated sustainability lead, and implement event carbon measurement practices

Currently, only 17% of survey respondents are legally required to report. However, with incoming legislation in both the UK and EU, this number is expected to rise significantly. At present, venues and brands are the most likely to fall under legal reporting obligations, due to their size or sector-specific regulations.

Among organisations with 500+ employees, 51% are legally required to report, compared to only 9% of those with fewer than 50 staff. This disparity presents challenges for collaboration across the sector. Nonetheless, the overall trend suggests that legal requirements have a net positive effect on sustainability progress.

Alongside regulation, voluntary sustainability commitments are gaining traction. In our survey, the most common accreditations achieved were:

- **Ecovadis** - 14%
- **B Corp** - 7%
- **Green Tourism** - 6%

These frameworks often build on international standards while offering lower barriers to entry, making them accessible to a wider range of businesses. They are also increasingly recognised by clients and partners, offering brand reputation benefits and market differentiation.

Notably, sustainability accreditations appear to drive greater supply chain engagement. 76% of those not engaging suppliers also lacked sustainability accreditation, compared to only 24% among those with accreditation.

Improved accountability and responsibility for sustainability

As well as broader motivations, sustainability is advancing as organisations are getting better at embedding it into practice.

Our survey revealed a link between integrating sustainability into job roles and performance reviews and an organisation's overall progress on sustainability.

When sustainability is formally embedded into roles, teams are more accountable, engaged, and proactive in driving sustainability forward. 38% of respondents reported including sustainability responsibilities in **all** job roles and these organisations were:

3x MORE LIKELY to consider themselves leaders in sustainability compared to those who only applied it to some roles, and 10x more likely than those who didn't assign it to anyone.

35% MORE LIKELY to be measuring their carbon footprint than those without sustainability in job descriptions.

twice AS LIKELY to have a certification or accreditation, demonstrating commitment to industry standards.

Organisations with a dedicated sustainability committee or board were also significantly further along their sustainability journey, highlighting the importance of top-down leadership and structured oversight.

The role of these committees will change across organisations. They can help centralise data collection for regulating compliance or responding to client requests. Importantly, they help build internal awareness and understanding, contributing to a culture where sustainability becomes a shared responsibility.

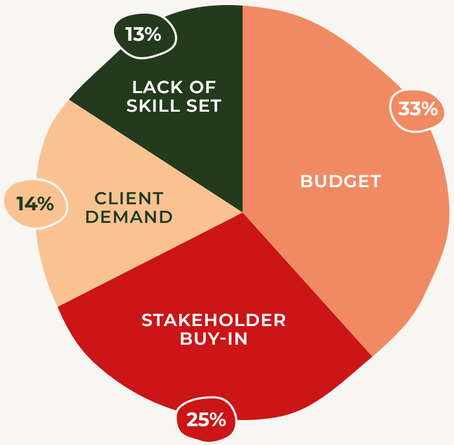
All organisations, regardless of size, should embed sustainability into job roles across the business, creating accountability structures, and governance. By doing so, organisations will drive meaningful change faster and more effectively.

Barriers to progress

Despite growing momentum, it's clear that many event organisations are still in the early stages of progress, and data from TRACE highlights we still have a long way to go before Net Zero.

Our key findings were that budget, stakeholder buy-in (including client demand) and lack of education are the top three barriers to making progress.

What challenges do organisations face when championing sustainability projects?

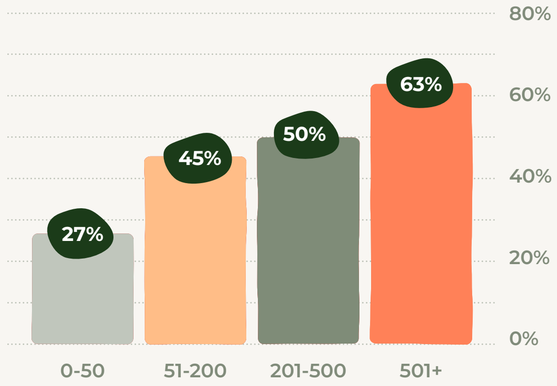


Budget constraints

When budget was explored in more detail we discovered:

- 81% of businesses with a budget in place have moved from early stage to making measurable progress, whereas 38% of organisations without a dedicated budget remain in the early stages of their journey.
- Venues are the most likely to have sustainability budgets (60%)
- Smaller organisations (<50 employees) face unique challenges in implementing sustainability initiatives due to limited budgets impacting choices and staff capacity.

% of organisations with sustainability budget compared to size



Stakeholder buy-in

The event sector is a complex eco-system. Collaboration and improved buy-in across all organisations is required to accelerate progress.

In our survey, 60% of respondents said that stakeholder buy-in was very important in achieving sustainability goals, and a quarter of respondents said that stakeholder buy-in was their biggest challenge.

24% said that buy-in from the supply chain to provide the data was their single biggest challenge to measuring the carbon footprint of their events or services.

Only 14% of respondents said "client demand" was their single biggest challenge, indicating that there is strong appetite and demand for solutions that deliver impactful results.

41% of respondents are not engaging with suppliers and vendors on their sustainability goals. This gap may be less about intention and more about communication: while 86% are motivated by ethical reasons and 71% by societal or consumer expectations, it's clear that many aren't having the conversations that make those values visible or actionable.

Venues are currently the most engaged stakeholders, with 70% collaborating with suppliers and clients on sustainability goals. Brands are lagging behind, with only 42% engaging suppliers - highlighting a missed opportunity to drive change at the planning and procurement stages.

Collaboration is widely recognised as essential, but the data suggests it's not yet embedded in day-to-day practices. 76% of organisations without supplier engagement lacked any sustainability accreditations, compared to just 24% of those that did. This is a clear call for better communication, shared frameworks, and stronger cross-sector alignment.

How to improve supply chain engagement as an organiser

Engage early
Integrate sustainability requirements and data expectations into RFPs, briefs, and onboarding conversations from the outset. Early engagement sets the tone and avoids surprises.

Give more lead time
Wherever possible, build in longer timelines - not just for project delivery, but for data collection. Avoid last-minute requests, especially for detailed measurement.

Set clear expectations
Define what data you need, when you need it, and how it should be submitted. Clear targets and deadlines increase the likelihood of receiving accurate, timely information.

Embed commitments in contracts
Where appropriate, include measurement and reporting requirements in supplier contracts, and for smaller suppliers, consider additional resource / budget requests to facilitate your ask.

Tailor your approach
Be patient but consistent with small or under-resourced suppliers, and bring them along with you. At the same time, don't be afraid to expect more from larger suppliers, especially those already working under regulatory or voluntary sustainability frameworks.

Skills and know-how

Some survey responses revealed misconceptions about carbon measurement and literacy. Responses were contradictory, suggesting terminology was not well understood. 35% of those who said they measured Scopes 1, 2 & 3 also stated they weren't measuring Scopes 1 & 2.

Organisations without clear sustainability training struggle to implement consistent measurement and reporting and those who are leaders have education embedded throughout their organisation.

Cassidy Knowles, Group Managing Director, Chorus Creative Group, shares: "Leadership comes from being educated about the subject that you're talking about. Education isn't just for our project managers or our production managers, everyone from finance to artwork to design goes through training, so we're all singing off the same hymn sheet. This builds collective confidence in the team, even if they don't all have in-depth knowledge across all topics."

Check out isla's **Training Programme** for sector leading sessions to give you the confidence to have impactful conversations with your supply chain.

Following the leaders

While many organisations are just beginning their sustainability journey, some are stepping up as true leaders. Drawing on insights from our survey and focus group discussions, this section explores what sets these organisations apart.

By understanding what leaders are actually doing, we aim to showcase best practices and inspire others to accelerate their own progress.

Who considers themselves as a sustainability leader?

We identified several key traits shared by those who see themselves as sustainability leaders. Leadership was found across all organisation types: Agencies (7%), Corporates (10%), Venues (15%) and Suppliers (16%) and anecdotally, leadership is often recognised externally before its claimed internally:

"People started asking what we're doing and for our opinions and feedback. That implies that we must be doing something right. When that happens a number of times, that's when the penny starts to drop - that we're well-received and respected among our peers within the wider industry." **Matt Phipps, Group Account Director, Moss UK Group Ltd**.

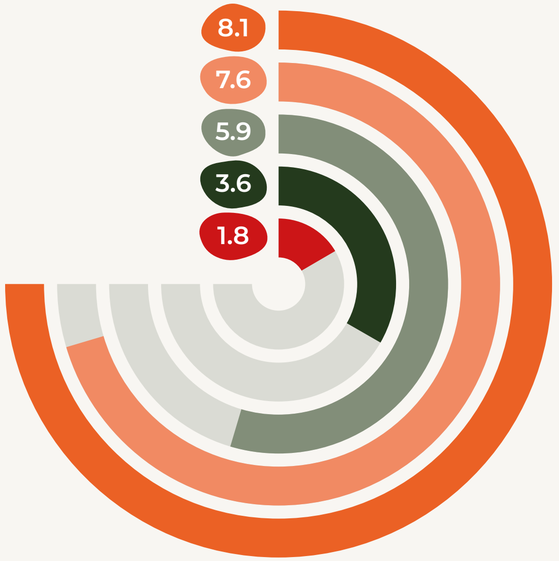
Leaders build a Culture of Sustainability

Sustainability leaders see their role as both educators and change-makers. They advocate for improvements across their supply chains and push for systemic change across the industry. Internally, they're building a strong culture, where sustainability is shared, understood, and embedded across teams.

Our survey confirms the hypothesis that the more actions a business has implemented, the more advanced it is in its sustainability journey.

The three most common sustainability practices are:

- A written sustainability policy or strategy
- Sustainability champions / a dedicated green team
- Supply chain engagement on sustainability goals.



Average number of implemented sustainability activities by progress level

KEY

- Consider ourselves to be leaders in this space
- Implemented significant changes with a clear strategy in place
- Some good progress and a plan for next steps
- Early stages but making progress
- At the very beginning of our journey

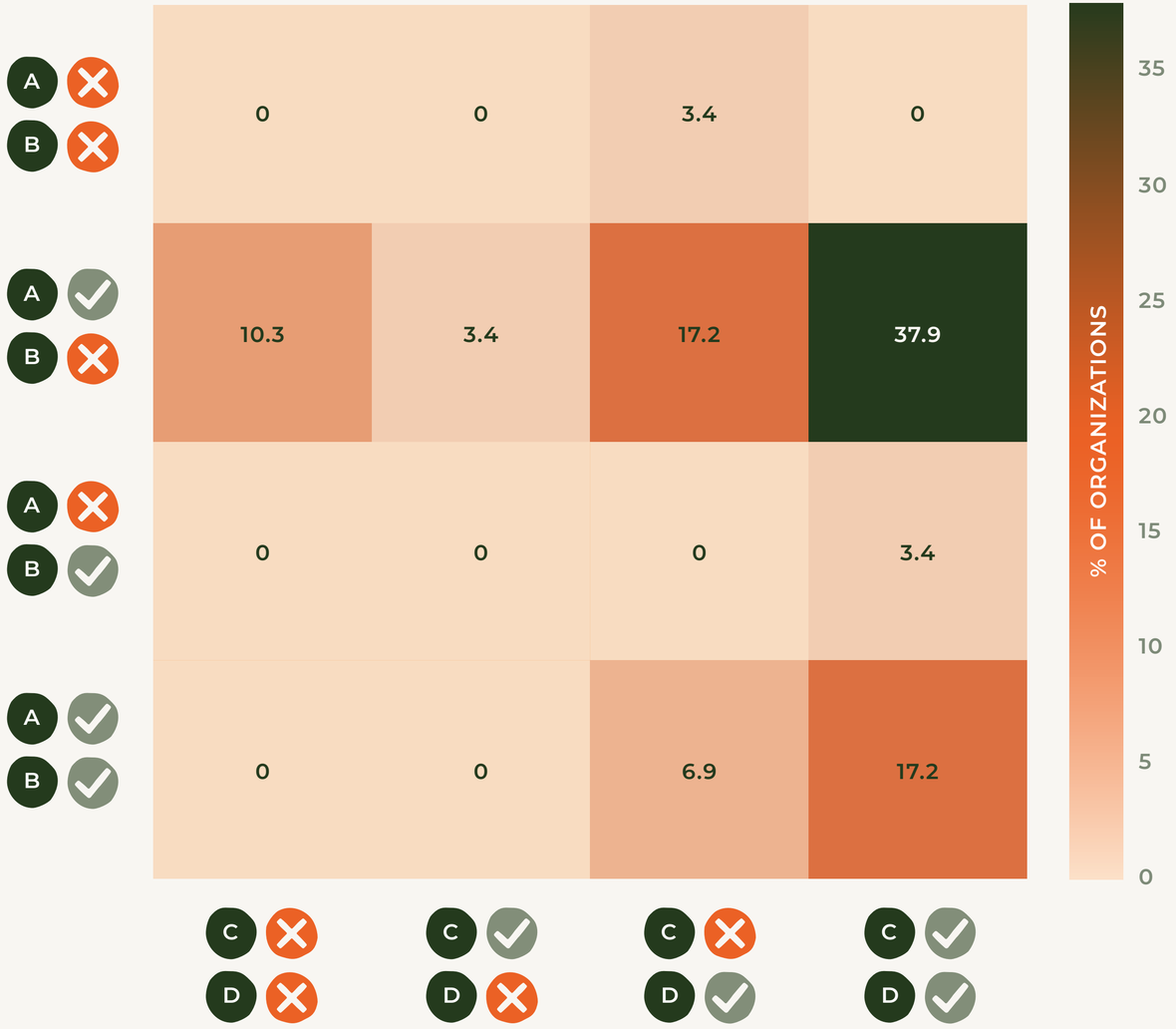
Leading without the legislative pressure

Whilst there are common themes in how leaders are acting, not all leaders act the same. Only 17.2% of leaders are legally required to report, have a dedicated sustainability budget, have a sustainability committee and have responsibilities written into job roles.

But 37.9% of leaders are taking these actions without the legal pressure to report, showing that they are taking the initiative and that sustainability isn't about compliance, it's about driving forward change regardless.

These leaders are not waiting for the auditors to knock at their door, but are being proactive and future-proofing their business now.

Heatmap of key change-drivers and % of leaders implementing these practices



What defines leadership?

What distinguishes these leaders is that intent is backed-up with implementation of structures and the resources to support it. Leaders are:

- More likely to have a dedicated sustainability budget (24%)
- More likely to be legally obligated to report (27%)
- Significantly more likely to include sustainability in everyone's job descriptions (48%)
- Highly likely to have a dedicated sustainability committee or board (93%)

KEY

- A Legally required
- B Dedicated Committee
- C Sustainability in job roles
- D Dedicated budget

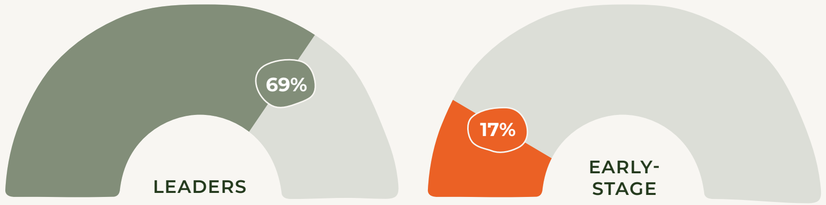
Actions leaders have taken

While the industry as a whole is waking up to the importance of sustainability, a group of frontrunners are already well ahead, translating ambition into structured, measurable action.

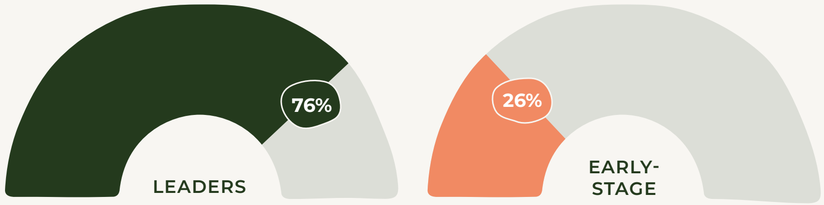
By examining what these leaders are doing differently, we can begin to understand what meaningful progress looks like in practice.

Compared to early-stage organisations, leaders are:

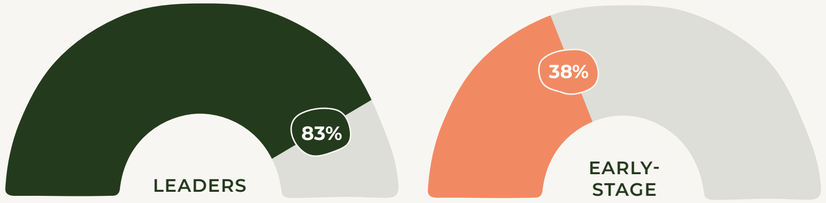
→ **4 times more likely** to measure Scopes 1, 2 & 3 emissions



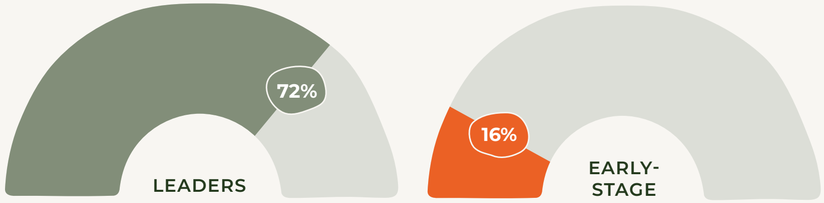
→ Nearly **3 times more likely** to implement event carbon measurement



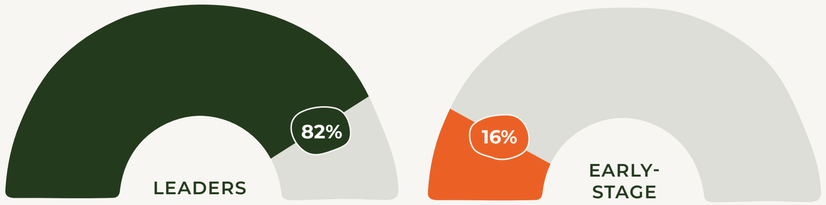
→ **More than twice as likely** to provide sustainability training to employees



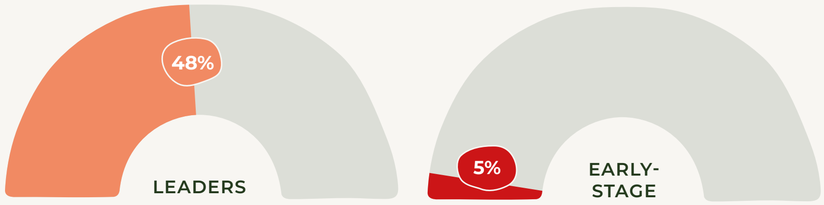
→ **4.5 times more likely** to engage with suppliers on sustainability goals



→ Over **5 times more likely** to have sustainability champions or green teams



→ **Almost 10 times more likely** to have sustainability in job descriptions across the organisation.



Conclusions

The world is changing. Climate breakdown and environmental change are reshaping the systems we work in. Although political shifts in 2025 have tested momentum, some changes are now irreversible. Green investment is accelerating across global markets and landmark legislation in the EU is in motion, with the UK expected to follow suit.

We're only beginning to understand what this new reality means, but the direction of travel is clear; sustainability is no longer optional.

By leaning into these changes now, we can shape the future - rather than be shaped by it. Events don't have to be passive victims of change. They can be powerful drivers of it.

This *2025 Temperature Check* builds on the success of isla's first report with 7.5 times more data than our first release. As the data grows, so too does our ability to spot trends, identify carbon hotspots, and take smarter, evidence-based action.

The sector has already taken important first steps. Now it's time to scale, to lead, and to make sustainability the standard, not the exception.

Carbon and waste impact

Using data from TRACE, we explored the carbon and waste impacts of events across Europe and the UK that took place in 2024. Key findings included:

Benchmarks

For the first time, we present industry benchmarks for event emissions. But with such variety across event types, there's not yet a universal baseline. The best benchmarks are your own.

Travel isn't everything

Audience travel remains a major source of emissions, but it's not the whole picture. Organisers have more influence than they realise. Smart decisions around production, freight, and procurement can significantly reduce emissions. Leading by example can shift both supply chains and audience behaviour.

Smart carbon swaps

From switching to plant based meals, to travelling economy instead of business class, our report highlights small changes that can make a big difference to your event's carbon footprint.

Sustainability in practice

Across the sector, organisations are stepping up, driven by moral imperative and growing social, commercial, and legal expectations. However, limited budgets, inconsistent buy-in, and lack of cross-sector coordination slow progress.

Start with measurement

Measuring your carbon footprint is the foundation for meaningful progress. It unlocks collaboration, prepares you for legislation, and drives further action.

TRY TRACE FOR FREE →

Make sustainability everyone's job

Embedding sustainability into job roles and performance reviews creates clear accountability - and is one of the strongest indicators of long-term success.

Build systems for action

From data platforms to sustainability committees, invest in structures that support responsibility across teams, suppliers, and audiences.

What we expect to see next

Looking ahead, we predict the following trends will shape the next phase of progress:

Measurement at Scale

Broader adoption of tools like TRACE will continue to drive better benchmarking and help identify the most effective reduction strategies.

Circular Design

Events embracing reused, hired, and second-life materials will become industry frontrunners, offering new creative and low-carbon design models.

Collaboration-First Approaches

Success will increasingly depend on partners and clients working together - sharing data, aligning goals, and allowing space for innovation.

Closing statement

The purpose of the Temperature Check report is to transparently share information and provide data to empower conversations, no matter where you sit within the events industry. The report is inherently data-led with carbon data from TRACE by isla and industry survey responses shaping its narrative.

For this iteration, we worked with a significantly larger dataset than our first report, published in May 2023, reflecting the industry's growing commitment to quantifying sustainability efforts and sharing insights. This report also highlights the growing need for formal reporting to comply with regulations, retain clients, and attract new business.

One of the most exciting and highly anticipated aspects of the report is event emissions benchmarking, made possible by the reach of TRACE and the collective contributions of those who have provided data over the past year.

Given the vast diversity across the events industry, benchmarking has historically eluded us. However, as the dataset expands, we can make increasingly confident comparisons - both against the wider industry and, more importantly, against the most valuable benchmark: your own data. These benchmarks will continue to evolve, with deeper analyses by event type coming soon, alongside further exploration of different impact areas.

Producing this report has been a fascinating opportunity to showcase the innovative work happening across the isla and TRACE communities, and the wider events industry.

It has provided moments of reflection, challenging the status quo and inspiring change through creativity and collaboration. At the same time, it has required restraint, as there are countless tangents to explore and insights to uncover - many of which we hope to dive into in future reports.

If you'd like to collaborate on solutions or shed further light on the challenges discussed, we'd love to hear from you.

The team at isla

Acknowledgements and Thanks

With huge thanks to our TRACE clients and users, without whom this work would not be possible. We are also grateful to everyone who engaged in our surveys, focus groups and research.

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isla is a non-profit organisation and this report is entirely FREE. If you have found the Temperature Check useful and would like to support the creation of more insights like this, you can *buy us a coffee*.

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