



**INTERNATIONAL
ASSOCIATION OF
VENUE MANAGERS**

COVID-19 IMPACT SURVEY

Venue Industry (All Sectors)

Data collected: 7/1-7/17/2020

Research and Production

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

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Background Information

- Using an internet-based survey platform, a survey was conducted to gauge the status of reopening venues currently. The survey began on July 1, 2020 and ended on July 17, 2020.
- From a list of 1,242 venue organizations, a total of 230 complete and 30 partial responses were obtained for a total response rate of 21%.
- When possible the information throughout the report has been broken down by venue type.

Sample Size by Venue Type		
Venue Type	# of Responses	Response Rate
Arenas	88	33.8%
Stadiums	9	3.5%
Convention Centers	59	22.7%
Performing Arts Centers	90	34.6%
Other	14	5.4%

Size of Venues				
Venue Type	Large	Medium	Small	Don't Know
Arenas number of seats	28.7% (Over 12,000)	29.9% (7,501-12,000)	41.4% (Less than 7,500)	0.0%
Stadiums number of seats	55.6% (Over 35,000)	33.3% (15,001-35,000)	11.1% (Less than 15,000)	0.0%
Convention Centers gross sq. ft. of exhibit space	8.5% (Over 500,000)	33.9% (100,001-500,000)	55.9% (Less than 100,000)	1.7%
Performing Arts Centers number of seats	24.4% (Over 2,500)	28.9% (1,501-2,500)	46.7% (Less than 1,500)	0.0%

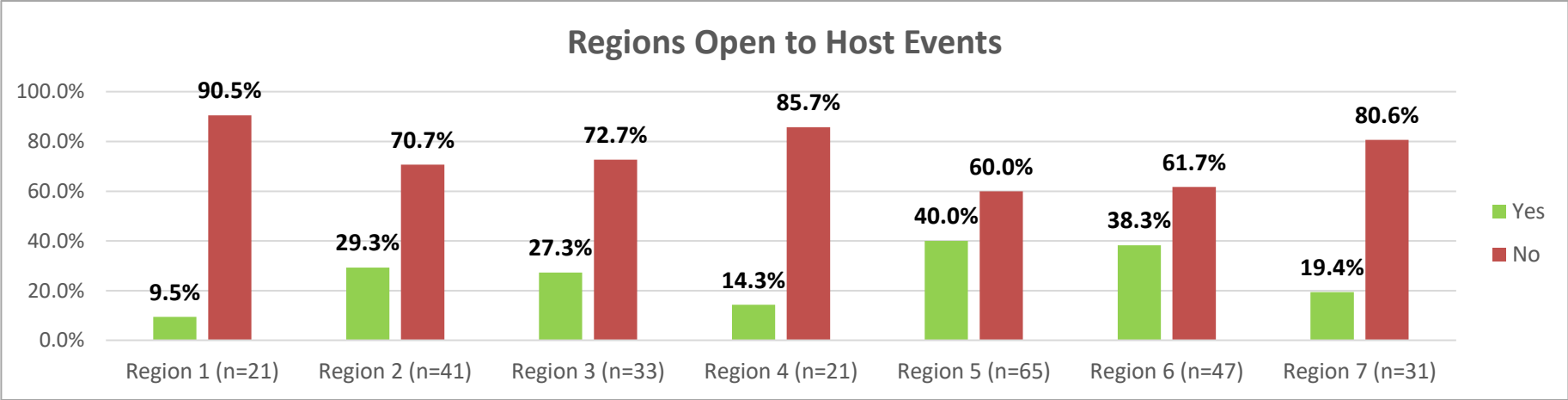
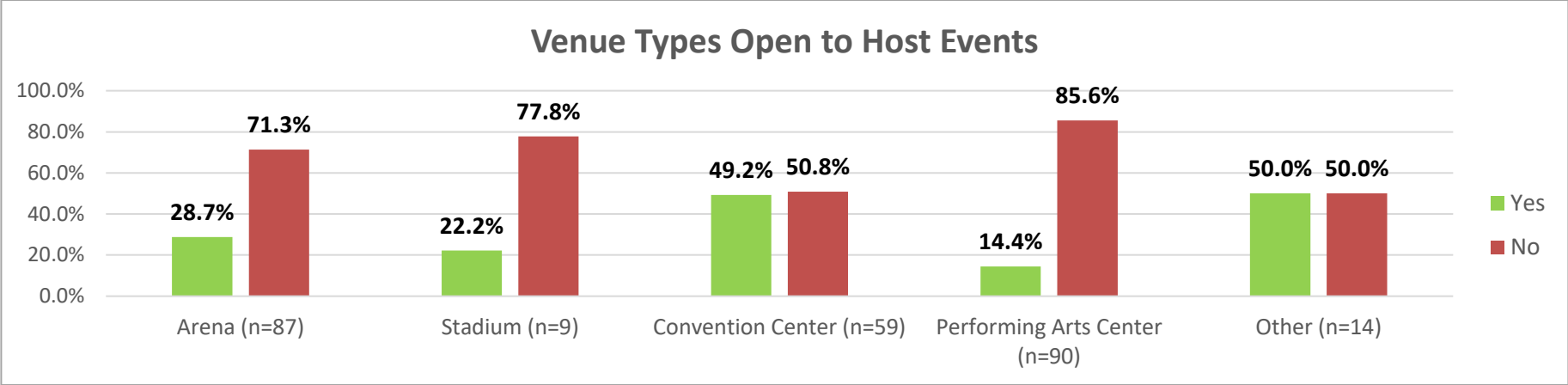
Background Regional Information

- With the phases of opening varying based on location some information throughout the report will be categorized by the IAVM regions. This is to allow some insight into the differences that may be present geographically. Participants were all from the United States.
 - Below is a chart of the participating responses by Region (n=260)
- There are seven regions nationally ...
 - **Region 1:** *Maine, New Hampshire, Vermont, Massachusetts, Rhode Island, Connecticut, New Jersey, Delaware, Maryland, District of Columbia, east portion of New York southeast portion of Pennsylvania*
 - **Region 2:** *Ohio, Indiana, West Virginia, Kentucky, west portion of New York, northwest portion of Pennsylvania*
 - **Region 3:** *North Dakota, South Dakota, Minnesota, Wisconsin, Illinois, Iowa, Missouri, Nebraska, upper peninsula of Michigan*
 - **Region 4:** *Washington, Oregon, Idaho, Montana, Alaska, Wyoming*
 - **Region 5:** *Virginia, Tennessee, North Carolina, South Carolina, Mississippi, Alabama, Georgia, Florida, and Louisiana*
 - **Region 6:** *New Mexico, Colorado, Oklahoma, Arkansas, Texas, and Kansas*
 - **Region 7:** *Arizona, California, Hawaii, Nevada, Utah*

Region	# of Responses	Response Rate
Region 1	21	8.1%
Region 2	41	15.8%
Region 3	33	12.7%
Region 4	21	8.1%
Region 5	66	25.4%
Region 6	47	18.1%
Region 7	31	11.9%

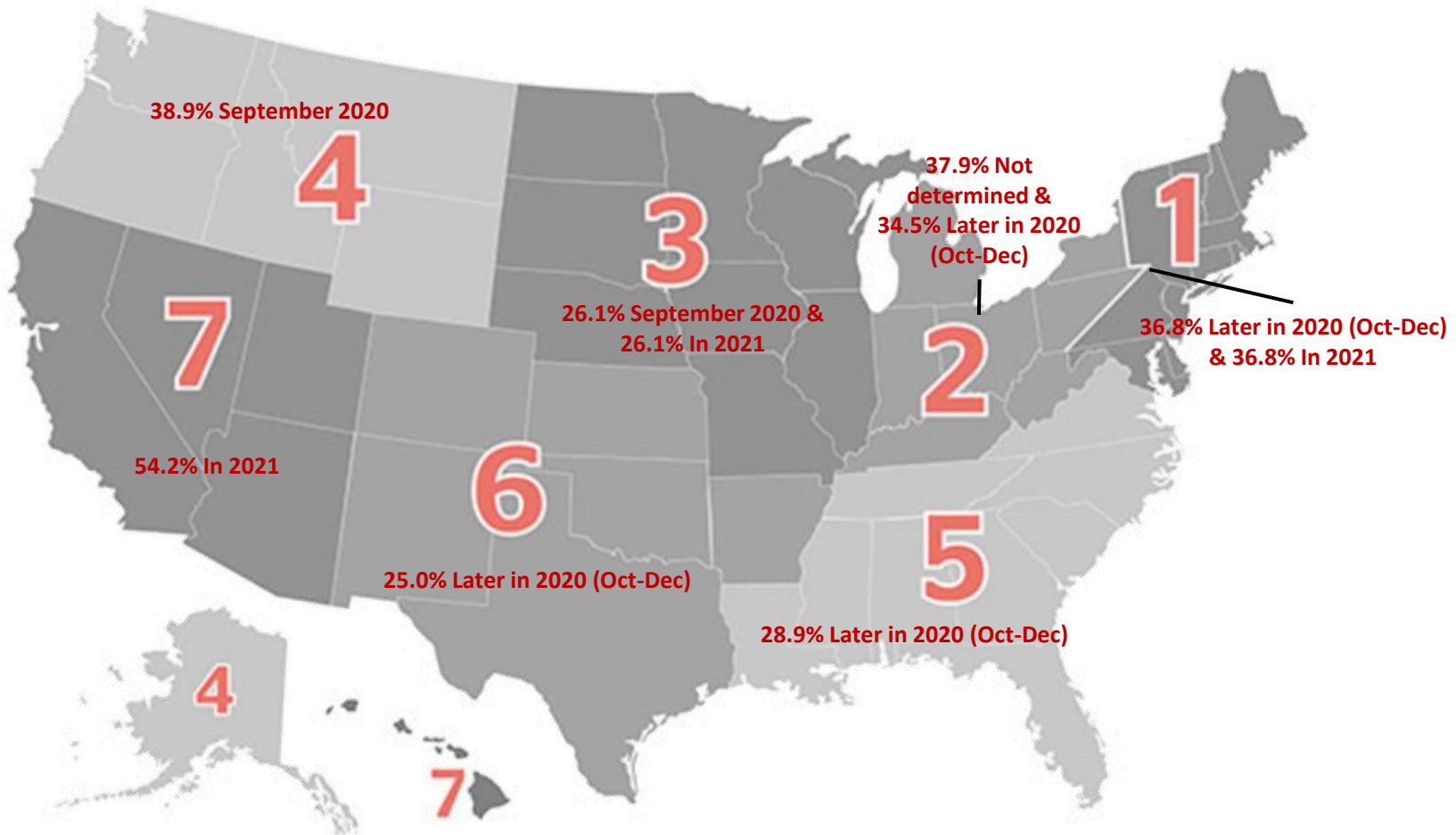
Open to Host Events

- According to the total data collected, most venues are not currently open to host events. Only 29.3% of venues from the total responses collected are currently open for hosting events.
- The first chart below is a breakdown of venues open to host events by type: Arena, Stadium, Convention Center, Performing Arts Center, and Other
- The second chart below is a breakdown of venues open to host events by IAVM Regions.



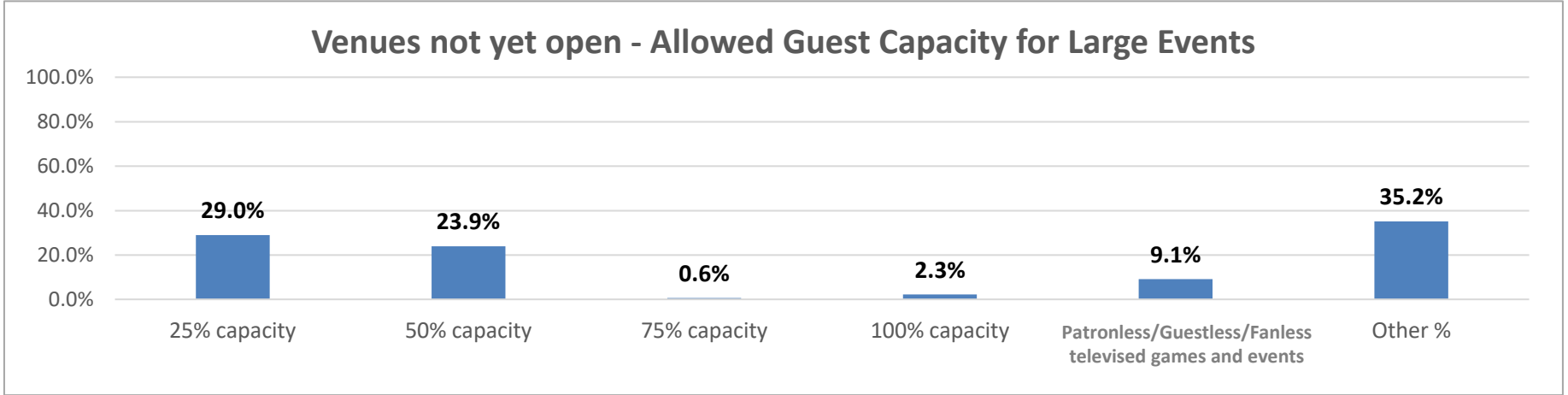
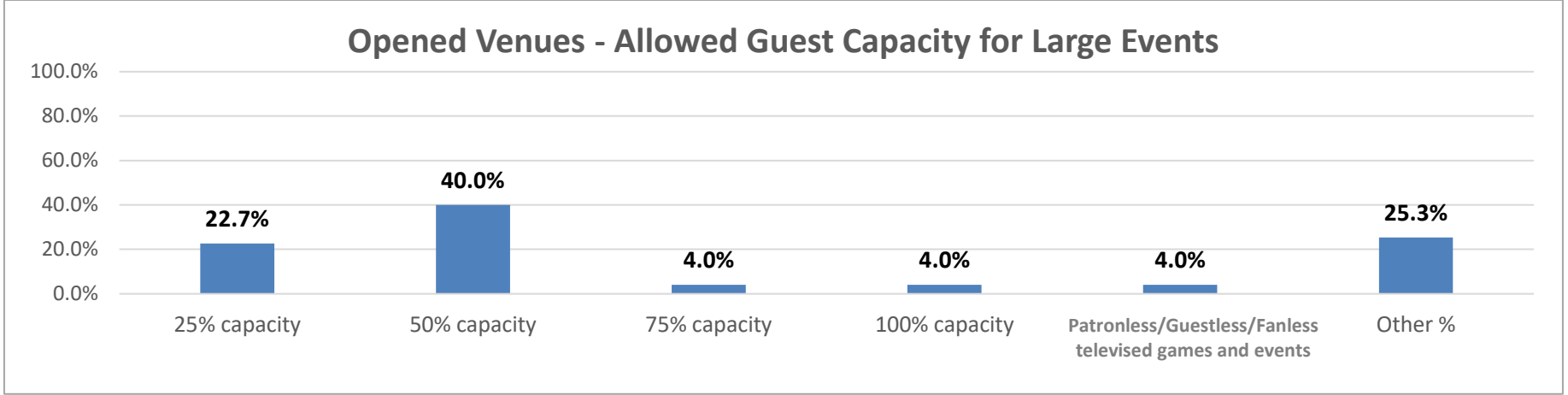
When Venues Will Be Open for Events

- 66.5% of venues predict they will be open for events after September 2020 or they have yet to determine a time
 - 25.7% Later in 2020 (Oct-Dec)
 - 20.1% In 2021
 - 20.7% Not Determined
- The map below shows the most common time that venues predict they will be able to open for events by region.



Largest Percent of Capacity Okay for Events

- Most venues that have opened will be allowed a 50 percent capacity during events by the local regulations (40.0%)
- Most venues not yet open are planning to allow a 25 percent capacity during events by the local regulations (29.0%)



Q8: Based on local regulations what is the largest percent of capacity event you can hosts? (n=75)
 Q10: Based on local regulations what is the largest percent of capacity event you can host? (n=176)

Staff Operation

- Majority of venues do not plan to operate with a full staff on hand at the time of re-opening.
- The overall average percentage of staff in comparison to the usual full staff levels
 - Full-Time Staff: 53.5%
 - Part-Time Staff: 31.6%
- Majority of the survey participants responded that their venue will not be requiring employee Covid-19 testing (61.8%).

Operate with a full staff on hand at the time of re-opening

Yes, 47.4% **No, 52.6%**

Percentage of Staff Used Compared to Full Staff Levels		
Venue Type	Full-Time Staff	Part-Time Staff
Arenas	55.3%	36.1%
Stadiums	67.5%	62.5%
Convention Centers	47.5%	19.6%
Performing Arts Centers	57.0%	34.9%
Other	43.3%	41.7%

Percentage of Staff Used Compared to Full Staff Levels		
Region	Full-Time Staff	Part-Time Staff
Region 1	60.6%	24.0%
Region 2	52.4%	40.5%
Region 3	53.9%	38.2%
Region 4	29.1%	16.8%
Region 5	62.9%	31.3%
Region 6	45.4%	31.5%
Region 7	53.1%	28.5%

Q11: Will you operate with full staff at time of re-opening? (n=253)

Q12: If you are able, please estimate what percent of staff do you plan to have operating the venue? (amount of staff on hand compared to usual full staff) (n=110)

Q13: How frequently will you require employee Covid-19 testing? (n=233)



Venue Safety Measures

- The survey asked participants to rank a list of six safety measures and rank in the order of most to least priority.
 - Not surprisingly, contact avoidance is the most important concern for when venues are re-opened
 - Below is a list of the average ranking from all 210 participants

1. Contact Avoidance (ticketless entry, cashless transaction, limited concessions, etc.)
2. Entrance Security (temperature checks, face mask checks)
3. Distancing (maintain distance between guests)
4. Sanitization and Cleaning
5. Employee Protection
6. Communication with Guests/Parton (additional signage, announcements, etc.)

Venues everywhere are facing unprecedented disruptions to daily operations and finance activities brought on by COVID-19. Over the next few months, IAVM will be periodically conducting a pulse survey in order to see the effects and impact COVID-19 has on the venue industry. We would greatly appreciate your participation in the upcoming surveys. Thank you very much for your time.

Research and Production by the 2019-2020 IAVM Research Advisory Committee:

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Please note that we will never identify the specific responses of any participating venue in any IAVM report. We will only report the average responses.

If there are any questions regarding this report, please contact 972-538-1001 or email to Research@iavm.org. For more comprehensive IAVM reports that detail venue operations and financial benchmarking information please check the VenueDataSource page, <https://www.iavm.org/research>.

